QUALITATIVE MARKETING RESEARCH

UNDERSTANDING CONSUMER BEHAVIOUR

DOMINIKA MAISON

ROUTLEDGE

Qualitative Marketing Research

This is a perfect guide to understanding the core principles of qualitative marketing research. It presents qualitative marketing research in the broader context of marketing and managerial decisions, consumer psychology, and contemporary knowledge about unconscious and automatic processes. Different types of qualitative marketing research methods are examined, from the classic focus group interview (FGI) and individual in-depth interview (IDI), to more cutting-edge methods such as ethnography or bulletin boards, which enable marketing researchers to discover and understand real consumer motivations, needs, values, and attitudes. The qualitative marketing research process is considered in step-by-step detail:

- from converting the marketing problem into research questions;
- choosing the right qualitative method;
- building research schemata;
- conducting the interview;
- to analysing data and preparing the report.

With numerous international case studies, including PepsiCo, Procter & Gamble, Danone, Nestle, Aviva, Heineken Group, and Citibank, the book is uniquely practical in its approach. It is vital reading for advanced undergraduate and postgraduate students of marketing research, consumer behaviour, and consumer psychology, as well as for practitioners.

Dominika Maison, PhD – Professor at the University of Warsaw, Dean of the Faculty of Psychology, and marketing research practitioner. All her professional life she has been trying to connect science with practice in the field of consumer research, social marketing, and financial behaviour. In her scientific work, she studies unconscious and automatic consumer processes, implicit attitudes towards brands and product categories (e.g., using the Implicit Association Test – IAT, a method based on reaction time), consumer motivation, consumer ethnocentrism, materialism, and financial behaviour.

In addition to her academic work at the University of Warsaw Faculty of Psychology, she has been actively engaged in marketing research practice since the early 1990s, having conducted hundreds of focus groups, in-depth interviews, and ethnographic research to date and provided many academic courses and courses for practitioners on marketing research, including qualitative marketing research, as well as bespoke courses for moderators. In 2005, she founded Maison&Partners – a market research company specialising in strategic marketing research. She has worked with some of the largest international clients like Procter & Gamble, Masterfoods, Danone, PepsiCo, Nestle, ING, Aviva, Citibank, Mastercard, and many others. Author of numerous highly cited scientific articles and books, including: *Badania marketingowe. Od teorii do praktyki* (*Marketing Research: From Theory to Practice*), *Propaganda dobrych serc czyli rzecz o reklamie społecznej* (*Propaganda of Good Hearts: On the Issue of Social Advertising*), *Polak w świecie finansów* (*A Pole in the World of Finance*), and *Psychologia konsumenta* (*Consumer Psychology*).

In 2003–2008, she was the President of the Polish Society of Market and Opinion Researchers (PTBRiO), and between 2012 and 2016, the representative for Poland of ESOMAR, the European Society for Opinion and Marketing Research – the largest international organisation dealing with opinion and marketing research.

Qualitative Marketing Research
Understanding Consumer Behaviour

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Introduction

The aim of this book is to present various qualitative methods from several perspectives. First, from the perspective of the people involved in conducting research: on the one hand, marketers – those for whom such research is carried out and who pay for them, and on the other hand, researchers who conduct the study. Second, from the perspective of the knowledge underpinning qualitative marketing research, bringing together many different fields of study. It entails general knowledge from the social sciences (sociology and psychology) on society, culture, and individuals, as well as the mechanisms underlying their choices and driving their behaviours. It also comprises specialist knowledge on marketing, consumer decisions and behaviours, and how advertising works. All of this makes qualitative marketing research an interdisciplinary area that requires the integration of information derived from many different fields and sources, and not just practical skills like moderation. In this book, I have considered several perspectives that stem from my own professional experience as a psychologist and scientist specialising in consumer psychology and, above all, unconscious and automatic processes, as a long-standing marketing research practitioner working with the biggest multinationals, and as an academic involved in the teaching of marketing research to students and practitioners.

At the start, because of the interdisciplinary nature of qualitative marketing research, two issues must be made clear. First, it is important to grasp the difference between marketing research and consumer research as a scientific field. *Marketing research* consists of studies conducted by practitioners with the goal of identifying opportunities to increase product sales, building brand images, or changing consumer behaviour. Based on data collected from consumers (along with additional sources of information), direct and practical recommendations should be formulated, such as whether or not to launch a new product, which version of an advertisement to place in media, and which of several possible brand strategies to adopt. In contrast, *consumer research* is an academic field, where scientists, especially psychologists, conduct relevant studies. The goal here is to establish a general knowledge about the mechanisms underlying consumer attitudes, decisions, and behaviours. Both marketing research and scientific consumer research focus on the consumer (both, without exception constitute consumer research), but each addresses different questions and often uses different tools.

The problem with qualitative research is that it is constantly generally undervalued as a scientific research methodology, which is particularly evident in psychology but in scientific consumer research too, where experimental methodology is overrated. This can be seen not only across many psychological research textbooks, for instance,

but even in marketing research textbooks where qualitative methods are either omitted altogether or are only given marginal attention. The same goes for consumer behaviour articles published in top scientific journals. Fortunately, this is slowly changing and scientific research is also beginning to pay more attention to qualitative methods, discovering their usefulness to understanding the complex nature of a human being (although, it has to be said, that it is still a niche methodology in scientific psychology and scientific consumer research). In practice, however, mainly in the area of marketing research, qualitative methods are an accepted source of knowledge on the consumer, nevertheless, they are, unfortunately, sometimes treated as inferior compared to quantitative methods (mostly because of not being representative), less trustworthy, and most of all, as a method the results of which require quantitative verification for them to be considered reliable. Such an approach to qualitative methods in consumer research (both scientific and practical) is, without a doubt, flawed and reveals a lack of understanding of this research methodology. I try to address many of these misconceptions about qualitative marketing research in this book, also unveiling those areas of knowledge where qualitative research is irreplaceable, and where no other research methods are, in fact, capable of gleaning and unearthing such knowledge (e.g., finding consumer insights; Chapters 2 and 4).

Consistently, this common failure to grasp the specific nature of qualitative research and the prejudices towards this method have made teaching qualitative research (in scientific and practical terms) immensely challenging. First of all, the barrier resulting from the dominant training in the quantitative way of thinking during the education of students must be broken (Chapter 1). Second, there are definitely not that many good educational models concerning the teaching of qualitative research methods as there are in teaching of quantitative research. This applies to textbooks and teaching guides. Third, qualitative methods are more challenging for teachers as they contain a greater scope of subjectivity and, consequently, less clear and explicit rules and indisputable principles which can be passed on to students.

The first step in the process of teaching qualitative research methodology is for the students to gain a thorough understanding of the specificity of these methods (regardless of their type, e.g., in-depth interview, focus group interview, or others). This specificity is best explained by referring to the things that for most people are better known and understood, that is, quantitative methods (Chapter 1). It is also worth bearing in mind in the qualitative research teaching process that the practice of qualitative research, for instance, in the field of marketing research or research on the development of social programmes and interventions (which are other applied fields) looks completely different to scientific qualitative research (the objective of which is to discover the rules and mechanisms underlying consumer behaviour). The main difference is that, contrary to science, in applied research the planning stage of research does not have to be built on a specific theory. Moreover, in the case of analyses, following specific theories is unnecessary and analyses do not have to be performed so precisely, systematically, and rigorously as in the case of academic research (Chapter 8). There is no verification of hypotheses, just posing of specific practical questions, like how the communication of the commercial is understood, what is the potential and what are the limitations of researched brand positioning concepts (in case of future sales performance), what are the factors influencing greater interest in investment funds, and how to get people to give their money to specific charities (Chapter 5).

Drawing from my lengthy experience both as a researcher carrying out practical marketing and social research, and as an academic teaching qualitative research methods (mainly in marketing), as well as a trainer conducting countless trainings and workshops for practitioners, the greatest challenge is passing on the fact that putting the questions to respondents and finding the sought-after information is not one and the same thing (Chapters 6 and 7). For example, if what we want to find out from recent car buyers is what made them buy a given brand and we ask them directly "why did you buy this brand of car?", a direct response will often fail to reflect their true motives. This is because many areas that concern qualitative research are unconscious in nature and automatic (Chapter 2). We oftentimes are unconscious of the reasons why we behave in certain ways, why we make specific choices, and this also applies to consumer decisions. That's why, when we ask a given respondent about why they drink Lipton tea, drive a Toyota, haven't insured their apartment, hardly ever use their payment card, we usually don't get the real answer, which is not because the respondent wants to deceive us or conceal anything from us but because they themselves are unaware of exactly why they acted in such a way (Chapter 2). Insight into the real answers to these questions usually requires a lengthy conversation about topics which may appear to be directly unrelated with the issue in question (e.g., talking about values, needs, and lifestyle) and the use of projective and enabling techniques serving to glean what is unconscious (Chapters 4 and 6). At the beginning of the qualitative research learning process, beginner researchers are convinced that the answers to the questions they put to the respondents will give the true picture of reality. Once they become more and more aware that certain things have to be asked indirectly, the next challenge is teaching them how to go about doing this and what methods to implement (Chapters 3 and 6).

This book is addressed to both practitioners (working in marketing or advertising departments and research agencies), academics (lecturers, scientists), and students in different fields: marketing, communication, psychology, sociology – all with an interest in qualitative marketing research and gaining a deeper, more accurate picture of consumer behaviour. The book, despite its references to the most recent scientific developments in psychology explaining the mechanisms underlying decision making and explaining human behaviours, is – above all – a practical guide that aims to convey knowledge about "how research is done", and "how qualitative research *should* be done, but not always is", giving a wealth of invaluable practical tips and guidelines.

1 Why we need qualitative research methods

The role of research in marketing

Data-based marketing decisions

Marketing department staff, their heads of departments, and brand managers are constantly called upon to make a wide variety of decisions aimed – in short – at the growth in sales of the manufactured products. This apparently simple case is actually extremely complicated mainly because there is a plethora of factors that can affect the rise or decline in sales. The sale of a product is affected by factors related to the product like the packaging, name, promotion, communication, advertising, price and, of course, the quality of the product, as well as many other external factors like the exposition of the product in the store or the activities of the competition. This is why marketing staff are in constant search of support for their decisions in consumer knowledge and this is exactly what marketing research is intended to facilitate.

Marketing research started to become more important when the market became saturated with products with very similar parameters (Alase, 2017; Bailey, 2014; Jeffrey, 2010). This required an assessment of the market needs and consumer preferences so as to aptly adjust production and marketing communication to these expectations and gain a significant market advantage. However, the proper harnessing of information obtained from market research is not so simple a task as it may seem and a lot depends on grasping its specific role in making marketing decisions. First, it's important to bear in mind that consumer research should never be the only source of information but one of many different sources. When a marketing employee makes a decision concerning a change in packaging, for instance, he or she has to take into account not just the outcomes of marketing research (which may reveal a preference for one packaging option), but lots of other information like the packaging of the competition, in order to know whether or not the packaging will stand out. Apart from that, the production possibilities, costs, and distribution are also important for the new packaging – despite being attractive and standing out – to not impede transport.

Another limitation of marketing research is the possibility of its findings having a direct effect on the marketing decisions made. This is, unfortunately, impossible in the case of most studies and every client commissioning research should bear this in mind. There are two reasons why it is wrong to expect that research findings (both qualitative and quantitative) will clearly indicate the line of action. First, it is wrong (usually in the case of qualitative research) to expect that the marketer will find out exactly what he/she should do from the respondents. The respondent may talk about his/her impressions, feelings, experiences, behaviours, and decisions but how this information can be translated into marketing actions is the judgement call of the marketing department. Respondents simply do not have such competences even if they very much wanted to,

although the marketing department may well get to hear some "good advice" from respondents in the course of the qualitative marketing research. This advice can come in the form of the respondent sharing how advertising could be improved or what changes could be introduced to a product for it to be more successful. It is unfortunate, however, that this advice is rarely of great marketing use as the respondent does not take the underlying marketing mechanisms into account in his/her suggestions and simply stops at his/her own individual preferences. Thus, the suggestions could factor in the use of their favourite colour or a specific style of humour that they can relate to in the advertising, or simply picking a product because it's their favourite taste (however strange and unpopular it may be). In the meantime, all of this may be contradictory to the planned marketing, communication, or product strategy and giving in to such suggestions could compromise the studied products instead of actually helping them.

Box 1.1

It would be a mistake to expect the marketing department to capture marketing recommendations directly formulated by respondents during an interview. In a qualitative study, a respondent speaks about their impressions, feelings, beliefs, experiences, and behaviour. A researcher interprets their statements and translates them into recommendations. Whereas, the final decision concerning the marketing actions is made by the marketer in the company, and this decision is not only based on the information coming from the consumer research but also on other information from the market, from the company's internal data, and the experience and "business intuition" of the marketer.

There is yet another reason for the exercise of caution when taking marketing decisions, namely, the very complexity of consumer attitudes and behaviour, so as not to be guided by what was said directly during the study (see Chapter 2). Imagine a new, market-tested product receives very negative opinions from respondents, however, the final decision as to its launch in the market could turn out to be right, despite seeming to be in contradiction to the research findings. If we have a completely unique, innovative, and unconventional product, the negative reaction of respondents may stem from them failing to understand its benefits or from the fear of things new rather than the lack of actual potential of this product.

Box 1.2

The objective of marketing research is collecting data from the consumer along with their interpretation and conclusions. The marketing department, however, is tasked with the analysis of the degree of success or failure of various marketing moves in light of the information gleaned from consumers and taking the final decisions concerning specific actions.

One must never forget that marketing research is only one of the sources of information required to make marketing decisions and is certainly not the exclusive source

(Smith & Fletcher, 2004). It cannot be ignored, of course, but it also cannot be the sole basis for decisions as it can only be enabling in nature. What's more – and this has to be strongly emphasised – is that even marketing department members have a limited impact on the future marketing success of a product. The factors that do remain under their control (albeit partial) include elements of the marketing mix: the product, promotion, price, and location, as well as knowledge of the consumer (although also limited) as the potential recipient of the product. However, there are many other factors that are beyond the marketer's control but have an enormous impact on whether or not the product will be successful on the market. These include: the competitive and technological environment, cultural and social factors, the political, legal, and economic environment, as well as the internal resources of the firm.

Box 1.3

The best marketing decisions extend beyond the information supplied in the research. They refer to many sources of information and are based on the extensive experience of the marketer, his/her marketing sense, and intuition.

At this point, it is worth noting that despite its many limitations, marketing research is a very important component of the product management process. As global experience demonstrates, properly conducted investigations do increase the chances of product marketing success, which is why they should not be given up but conducted with full awareness of their limitations and the specific role they have in marketing decision making.

Qualitative vs. quantitative: choosing the right methodology

Marketing research can be approached from many different perspectives which is why it can be categorised in a wide variety of ways. From the perspective presented herein, the marketing research methodology dividing research into qualitative and quantitative is the most important angle (Bhati, Hoyt, & Huffman, 2014). Of course, this breakdown is a big simplification which is frequently being retracted as it does not always fully reflect the specificities of the research; nevertheless, it remains valid because of the marketing questions which are to be answered within the research. The answers to some marketing questions may only be found on the grounds of quantitative research, while others are based only on qualitative data (Ponterotto, 2006; Smith, 2004). Sometimes qualitative and quantitative research methods have to be combined in order to obtain a comprehensive answer to the posited questions.

Box 1.4

It cannot be said that one of the methods – qualitative or quantitative – is better or worse. Each of them serves different purposes thanks to which they marvellously complement each other. Each of these methods allows different kinds of information to be collected and, if the method is used for its intended purpose, is a very good and even indispensable tool.

In order to harness the findings of qualitative research in marketing decisions properly, it is first important to understand what qualitative research consists of, what it is characterised by, as well as what limitations and potential it possesses (Draper, 2004; Madill & Gough, 2008). However, this is not at all simple as throughout the entire learning process at school we are taught to count and draw conclusions from figures, almost everyone has a feel of what a percentage of something means, and we are constantly exposed to media reports of poll and survey findings. The picture is not so rosy as far as comprehension and drawing conclusions from qualitative data goes. These were the very skills that were missing from most people's education. Thus, the specific characteristics of qualitative research can most simply be shown by comparing them to quantitative methods, which people are more familiar with, and which are intuitively clearer than qualitative research.

The differences between quantitative (survey and experimental) and qualitative (individual and group interview) methods concern many different areas, starting from the research tools employed and ending on the manner of interpretation and results-based inferences that are made (see the comparison of approaches in Table 1.1). The main difference between quantitative and qualitative methods concerns the divergent scope of problems that constitute the subject of the research as well as the different sets of research questions (Burt & Oaksford, 1999; Creswell, Klassen, Plano, Clark, & Smith, 2011). Quantitative research focuses on the quantitative description of reality: how many persons saw a given advertising campaign, what are the differences between the users of product A and B, how many proponents of relevant views in a specific age group there are, what are the prevailing behaviours in a given population, and so on. In qualitative research, however, the investigator focuses on a qualitative description of reality, paying attention to a whole spectrum of phenomena and not their actual frequency (Levitt, Bamberg, Creswell, Frost, Josselson, & Suárez-Orozco, 2018). In a qualitative study on whisky drinking habits, the researcher concentrates on the situations that lead to reaching for a glass of whisky and not other spirits, and what it is that is so special in them. The subject of quantitative research, however, would be the question of which of these situations dominates and in what type of persons (e.g., in view of demographic characteristics). Research questions in quantitative study are often decisive in nature (e.g., do young consumers dine in restaurants like McDonald's or KFC more often). In qualitative research, however, the questions that are posed are more probing and exploratory in nature (Wertz, 2014), for instance: "What associations are evoked by KFC and what by McDonald's?", "What do young people like and dislike in each of these places?", and so on. (cf. Chapter 7).

Another difference concerns the respondent selection method harnessing either quantitative or qualitative methodology (Finfgeld-Connett, 2014; Golafshani, 2003; Morgan, 2007). In quantitative methods, the study participants are screened to constitute the best possible reflection of the population as representative (Churchill, 1995). This selection is done on a random or quota basis. An essential condition for random selection is having a database of all the elements in the population (called a sampling frame), from which the target population is drawn. An essential condition for quota sampling is having access to information on the population structure in terms of the selected variables (usually basic demographic characteristics) and constructing a sample so that it could reflect the structure of the population in terms of these variables. Sampling in qualitative research is completely different. This is a purposive selection based on the specific features of the respondents which is required to understand the studied problem and that characterises the population constituting

the research subject (e.g., young mothers using disposable nappies for their children, men drinking at least four bottles of beer per week, or regular newspaper readers – cf. Chapter 5). If, for instance, the research problem concerns the launch of a new brand of top-of-the-range instant coffee to the market, the respondents should meet the following essential purposive criteria: drinking instant coffee and buying top-of-the-range instant coffee (purchasing brands identified as competitive to the studied brand). The sample can also be characterised with various additional purposive criteria (e.g., demographic) which increases the predisposition of the respondents to obtain the information specified by the research objectives (Mariamposki, 2001; Templeton, 1994). There is no need and, what's more, it is not recommended that the demographic characteristics of the participants of qualitative research are representative of the population e.g., the proportion of men and women or younger and older consumers in the research corresponds to the relevant proportions in the population (Knodel, 1993).

Yet another difference between quantitative and qualitative research concerns the sample size (Morgan, 2007; Onwuegbuzie, 2012). Quantitative study samples tend to be larger depending on the research problem and the sampling methods deployed: ranging from several hundred to several thousand persons. A large sample is necessary in quantitative research in order to minimise sampling error and to allow the results to be analysed in different sub-groups (e.g., users of different brands, persons of different ages or various levels of income), while keeping the reliability of results. As for qualitative research, sample sizes are significantly smaller, usually ranging from 20 to 50 persons (around a dozen individual interviews or several focus groups). Larger samples in qualitative research are not advised (except in exceptional circumstances – cf. Chapter 5), since this has a negative impact on the quality and depth of the analysis. Furthermore, too much qualitative data cannot be effectively mentally processed by the researchers, which is why it may be left unused.

The questionnaire (survey) is the primary measurement tool in quantitative research, mainly comprised of closed-ended questions limiting respondent answers to a set of response options (e.g., "Do you eat yoghurts for breakfast?"). The questions are posed in the same form and order to each respondent. This makes the survey results of individual persons comparable and assumes that the variation obtained resembles the differences between persons and not the differences between measurements. Measurement tools are much more flexible in qualitative research where open-ended questions prevail giving respondents greater freedom of expression in their thoughts and opinions in responses (e.g., "What do you eat for breakfast?"). In practice, an experienced qualitative researcher only has a set of topics that can serve as the basis for discussion and not a collection of pre-defined questions. Such interviews are conducted with a flexibility allowing for the form and order of the questions to be aligned with the research objectives (Templeton, 1994).

The analysis and rules of interpretation of results are also different in each of the two methods (Denzin & Lincoln, 2005; Krueger, 1998). In research using quantitative methods, numerical indicators (percentages and averages) are calculated and statistical tests are used, making them more objective than qualitative research. The greater subjectivity of analyses in qualitative market research is mainly down to the lack of clear and unequivocal analysis criteria, contrary to quantitative methods where inferences are based on the results of statistical analyses and the conclusion leads are based on statistical test outcomes and the level of statistical significance. In qualitative research,

results can often be interpreted in a variety of ways, offering many possibilities and more or less probable interpretations (cf. Chapter 8).

Another key difference between quantitative and qualitative methods lies in the ability to generalise research findings. Qualitative research is sometimes treated as a "second category" research method (Bhati *et al*., 2014; Gough & Deatrick, 2015). It is mainly accused of not allowing the conclusions drawn from interviews to be translated into more general assumptions concerning the population (e.g., all consumers). This is true in the quantitative sense as inferences concerning the intensity or frequency of the phenomena observed in a population cannot be made on the basis of a qualitative study. For this reason, if four out of our eight respondents prefer strawberry jam, and four pineapple jam, we are not allowed to conjecture on the basis of such an outcome that 50% of the consumers in a studied population prefer strawberry jam and 50% pineapple jam. However, conclusions concerning the significance of phenomena and the relationships between them can, without a doubt, be generalised and this knowledge should not be limited to the observations from research. We can generalise the conclusions from a qualitative study provided that we are looking for qualitative knowledge in the research like, for instance, pertaining to the motives, mechanisms, dependencies, or configurations of certain features. A prerequisite for such a generalisation is the repeatability of observations in subsequent interviews. If – returning to the example – more respondents focus on consistent reasons for eating strawberry jam (e.g., it is sweet, has a pleasant strawberry aroma, and they like the sensation of chewing on the small strawberry seeds), whereas pineapple jam enthusiasts will have their own reasons for their choice (e.g., slightly tart), we will have the right to draw conclusions about what attracts consumers to strawberry jam and what pineapple lovers like. We are also fully entitled to make generalisations from such findings outside the several interviews conducted. If a similar pattern of dependencies is found in subsequent interviews, for instance, that brand A alcohol is rather associated with business parties, while brand B with family/friend get-togethers, we can also conclude that this is a general truth about those brands which extends beyond the gathered observations and the group of respondents interviewed. The experience of qualitative researchers shows that the repeatability of observations in qualitative studies makes it reasonable to assume that a given observation not only concerns the study group but the total population corresponding to key selection criteria (e.g., young mothers, experienced drivers, or persons that have just finished renovating their homes).

Box 1.5

Many people treat qualitative research as a worse, flawed type of research. This is a fallacious approach. Qualitative research is just as useful as quantitative but merely serving a different purpose, providing answers to different questions, and conducted in a different manner. And this should always be kept in mind.

Another criticism of qualitative methods by laymen is the subjectivism of the analysis and interpretation of results. It is important to remember that the analysis and interpretation of results in qualitative research is indeed subjective but this does not make this method any worse than quantitative methods (Kitzinger, 1994; 1995). The subjectivism

of analysis may also be an advantage but only for wise, probing, and highly experienced qualitative researchers. Such researchers can look at the results from a wider perspective than just the information provided and unearth much more in the outcomes than less experienced and less inquisitive researchers would.

Qualitative research is sometimes claimed to also have a low level of validity. In classical research methodology, a measurement is valid when it is of the intended object. In the context of qualitative research, scientists often ask themselves whether the observations made by them are valid, that is, if the picture of the phenomena that is maintained through discussions is a true reflection of reality. Do the opinions appearing throughout the interview reflect the true opinions of the participants or do they stem from a fleeting interaction between the respondents and between the respondents and the moderator? Experience has shown that, in most cases, the results obtained in qualitative marketing research can be trusted and considered as valid (Henwood & Nicolson, 1995; Johnson & Waterfield, 2004; Seale, 1999). Nevertheless, they should be approached with some degree of criticism, bearing in mind that there are many factors that can affect the results that are collected: first, the moderator – by the manner in which the questions are formulated, his/her voice intonation, their body language (cf. Chapter 7); second, the participants – through the effect that they have on each other or on group processes, which inextricably accompanies group interviews in particular.

It is also worth remembering that qualitative studies serve other purposes than quantitative research, namely, understanding reality and not the actual measurement of phenomena (Harré, 2004). Thus, it cannot be said that one method is better or worse than the other because they are simply different approaches that can wonderfully complement each other. Each method allows different kinds of information to be collected and, if used for its intended purpose, is a very good and even indispensable tool.

In the context of discussions on the characteristics of qualitative and quantitative methods, it is worth noting that one does not always have to choose between these two methods. In fact, research projects utilising both methods are being executed increasingly more often. Qualitative research findings are then complementary to the quantitative results obtained and serve their further explanation, deepening, and better understanding (Levitt *et al*., 2018; Levitt, Motulsky, Wertz, Morrow, & Ponterotto, 2017; Wolf, Knodel, & Sittitrai, 1993). Segmentation studies are a classic example of this research process. Quantitative segmentation studies are first conducted on large representative samples. Once the segments have been identified (on the basis of statistical analyses of quantitative study results), individual depth interviews (often an ethnographical approach) are conducted among the representatives of the relevant segments to gain a better understanding of the needs and values of given segments which are difficult to probe in a quantitative study since they are normally unconscious and difficult to verbalise for the respondents.

Nevertheless, it must be clearly stated that treating qualitative studies as not standalone and only useful for complementing quantitative research is a misconception that often stems from misunderstanding their specific nature and from prejudices towards qualitative methods (Meyrick, 2006; Rios-Cavalcanti, 2017). Some treat qualitative research as defective because it is unrepresentative since the type of studies and the findings obtained with the use of this method are treated as merely enabling data collected through "better" quantitative methods. However, it is not always necessary to complement qualitative research with quantitative studies – it all depends on the

Table 1.1 A comparison of quantitative and qualitative methods

	Marketing research method	
	Quantitative methods	*Qualitative methods*
Research questions	Determinative questions quantitatively describing the problem (questions: "how many", "who", "how often")	Exploratory questions qualitatively describing the problem (questions: "what", "how", "why")
Measurement tools	Survey – questions with a fixed form and order, prevalence of closed-ended questions	Interview scenario – freely gained information (topics forming the outline of the interview, open-ended questions)
Sample	Random or quota Large – usually within a range of 500–1,000 persons	Purposive Small – 20–50 persons (better when the sample is defined by the number of interviews/groups and not of persons)
Analysis and interpretation of results	Analysis harnessing statistics – more objective	Analysis without the use of statistics – more free and subjective Many interpretative possibilities (diverse range of conclusions), also involving the risk of overinterpretation or erroneous interpretation – the analysis is often more challenging than in quantitative research
	Possibility of quantitative generalisation of results to a population	No possibility of quantitative generalisation of results to a population **N.B.!** A qualitative generalisation of results to a population is possible (cf. Chapter 8)

specific research problem. There are situations where qualitative research is entirely justified as the single study form and there isn't the slightest need to complement it with quantitative research findings (Williams & Morrow, 2009). Some examples can include the study of hidden needs and barriers relating to the use of a given brand or category and the marketing or positioning concept testing where answers to the research questions posed can only be obtained through qualitative research.

How qualitative research can help to answer marketing questions

There are certain groups of problems and marketing questions where qualitative studies are particularly useful and often even indispensable. These include the following three questions relating to:

1 The placement of new products on the market.
2 The development of communication: concept testing and studies at different stages of the development process.
3 Consumer behaviour learning: the study of attitudes, opinions about products and brands, the study of habits and needs, as well as of the barriers and motives related to the use of the brands/products.

Introducing a new product into the market

Bringing new products to the market is one of the more popular areas of use of qualitative research while also being one of the most difficult research landscapes. Despite the most important part of the new product creation process taking place in the firm developing the product, the opinions obtained from potential clients in the early development phase will allow costly mistakes to be avoided and increase the chances of the market success of the product. Qualitative methods can be harnessed at every phase of the product development process: its characteristics, product positioning concepts, packaging, name(s), as well as physical and utility features (Mariampolski, 2001). The findings help align the product under development with the expectations of potential recipients. The chances of success even of an objectively very good product with excellent advertising are still slight if it is perceived by consumers as too cheap or too expensive, of questionable quality, or failing to give any new benefits compared to competing products. Analysis of the lack of success of many new products on the market has shown that conducting marketing research on the product development phase and taking consumer-derived knowledge into consideration in the decision-making process help avoid many failures (Urban & Hauser, 1993).

Product concept testing

The aim of product concept testing is discovering the first, spontaneous reactions of potential consumers to the idea of the product to be brought to the market. Qualitative methods are the most suitable for this as they allow free responses that are uninhibited by structured questions. Quantitative methods are not advisable on the product creation phase. First, because the concept that can be presented to the respondents often requires many explanations and clarifications from the moderator. Second, it is often difficult to foresee so early on in the process how potential buyers could react to the product, which is why it is not clear which questions should be asked in a survey. Such studies should be conducted at the initial phase of the product creation process when the invested money and time is still marginal, allowing modifications to be introduced. Nevertheless, the study can't be carried out too early on when the product concept has not yet been fully specified. Then – because of the lack of specifics – the discussion could be too abstract and, therefore, too difficult for the study participants. All kinds of aids help make the discussion more specific: descriptions of the product, a model (plaster, cardboard, in diagram form), packaging design, name proposals, and visually stimulating materials are desirable in these kinds of studies.

Product idea studies not only concern products in the physical sense but also facilities like services (e.g., financial). In these studies, respondents are presented with new offers (e.g., new savings systems, loans and mortgages, investment products) while the moderator concentrates on understanding how these offers are perceived by the respondents: if they understand the offer, what advantages and disadvantages of the products they see, and what degree of interest is shown (both on the verbal and non-verbal level), etc. Based on the results of such studies, companies can abandon the introduction of a new product or modify it accordingly before it is launched or even produced.

Product features testing

Certain qualitative research is also focused on the reaction of consumers to final products once the development phase is complete. Such studies are used to modify the formulas of these products or select the options with the greatest potential when placing on a new market. From a theoretical point of view, the most suitable product testing method is an experimental quantitative research conducted on a relatively small number of respondents (e.g., 100–150 persons), on purposive samples, and using quantitative tools for measuring and analysing data. However, products are sometimes tested using qualitative research. Despite this not being the most suitable of methods for these kind of research questions, the results produced in qualitative research can also be useful to get a general feel for the problem. However, the outcome of such research should be approached cautiously and no decisive conclusions should be drawn (e.g., product A should be placed on the market because it was evaluated better than product B).

Product testing seldom is – and shouldn't be – the principal objective of qualitative research. It usually is just one of many study elements, for example, when testing brand positioning, advertising, or the general preferences and opinions of a target group, and merely serves in getting an overall picture of the situation (Mariampolski, 2001). Group interviews are usually selected for studies where the sensory traits of products (the taste of fruit juices, the smells of shampoos) and their utility features (e.g., the quality of user manuals) are tested. Since focus groups are not quantitative studies, the product testing outcomes produced in this way should also have a qualitative specificity. For example, when testing juices, it is not which juice tastes better or worse for the respondents or which juice tastes better for the majority but how the tested tastes are perceived in qualitative terms, for instance, if a given taste is perceived as an ordinary or refined taste, if it is more suitable for children or for an elegant event, if it tastes natural or artificial, and so on. The moderators should guide the discussion so as to obtain as much information as possible about the tested products. This is not always easy as consumers are more comfortable talking about which of the tested tastes they prefer most rather than describing the impressions associated with their sensory qualities. When using qualitative methods to test products one must always remember that this is not a classical sensory test (which requires more stringent, quantitative methodology) but more a study of the impressions formed by the products in the minds of the consumers.

Packaging testing

When testing products of everyday use that have very few differences between them in terms of their actual ingredients (e.g., washing powders, yoghurts, margarines, beers, similarly priced cigarettes), the packaging plays a very strong role because specific brand purchase decisions are often based on their appearance ("I bought it because it had an interesting shape", "I liked the colour of it"). This is why the assessment of packaging is also an area of frequent product testing. In qualitative research, packaging can be tested at every phase of the packaging development process, starting from the graphic design stage, right up to the definitive forms (Mariampolski, 2001). If we are after information about the packaging colour scheme and graphic design, boards are sufficient. However, should we be interested in the way the packaging shape or size are perceived, scale or full-size models of the design (e.g., mock-ups) are required.

Brand name testing

Brand name testing is another important area in qualitative research. Here too the investigator's role is not an easy one as it requires giving the right direction to discussions to gain as much qualitative information about the names put forward as possible. Unfortunately, the things that respondents are most eager to talk about, that is, about what they like or dislike the most, are of least importance. The whole scope of the associations and meanings relating to the name are much more important. In qualitative brand name testing, the following information is of greatest interest:

- Content and emotional associations – names, apart from their literal meaning, also have a certain emotional charge, even abstract names have positive or negative emotional connotations and can be associated with something elegant or common, hot or cold, and so on.
- Spontaneous meaning connotations and subliminal messages – for example, a name for a teen market product thought up by a producer can have an unintended negative meaning in teenage slang.

Apart from the various kinds of associations and subliminal messages, brand name testing focuses on the following:

- Tailoring the name to the product category – a name accepted as a biscuit name could be rejected if used for a make of car.
- Tailoring the name to the product image – for example, a brand name that suits a luxury make of car can seem to be pretentious when transferred to a low class car.
- Easily recognisable and memorable – is a name similar to other brand names on the market leading to it being confused with them.
- Easy to pronounce and say – this is particularly significant when products retaining the spelling of the foreign-language original are entering a new market.

Studies conducted many years ago preceding the placing on the Polish market of a premium cosmetics series for mature skin helped prevent a big marketing blunder. One of the brand names that was suggested was "Renaissance". The word "Renaissance", despite having an unequivocally positive meaning in the realm of art, in the context of face creams for mature skin was associated with renovation of historic buildings and, consistently, with beauty products for old ladies ("skin remodelling to reduce wrinkles"), which was not at all the effect intended by the manufacturer. In another study concerning the choice of brand name for a bank start-up, which was meant to be perceived as a high-tech bank of the future based on solid financial foundations, one of the names that was expressly discarded was "Pillar", which – despite implying high stability and a sound financial basis – was missing the essential element of modernity.

Communication research: concept test and advertising pre-test

Positioning concept testing

Positioning is a base for communication strategy and the building of an advertising message. Good positioning emphasises the product benefits that make it exceptional and different from rival products in the eyes of the consumer. The very same product

can be presented to potential clients in many different ways (differently positioned), each time accentuating a specific product feature. Qualitative research tests the proposed positioning concepts of products that are about to be launched or of existing products if a change in their positioning (repositioning) is called for (Mariampolski, 2001). The aim of the qualitative research is to select the best approach to positioning in terms of its communication value: what it says about the product, whether it attracts interest in the product, if it stands out from the many competitive products available on the market.

Some important practical advice in such research is not to focus on what the consumers like the most (since they usually like what is most familiar to them) but on what are the most distinguishing features of the product and what attracts the most attention.

Advertising testing

The right selection of promotional and advertising materials is vital to the later success or failure of the product. Advertising material should present the product or brand in an appropriate way (in the sense of it being consistent with the communication strategy). The study of reactions of potential consumers to developed advertising materials allows the answers to the following questions to be obtained: based on the advertisement, how do recipients understand the advertising message, do they perceive the product in line with the intentions of the product (advertising) developers, and do they see the competitive advantage of the product over rival goods? Due to the high production costs and the ensuing financial risk, it is usually the most expensive advertisements – television commercials – that are tested. Radio, press, outdoor, and internet advertisements are seldom tested because the cost of their development is much lower, thus, involving a smaller financial risk.

Qualitative methods are mainly used in pre-testing visual advertising messages (Maison, 2007). Appropriately carried out focus groups, dyads, or individual interviews provide in-depth information about the reaction of potential consumers to advertising: how they perceive it and what impression of the product is created by the advertisement. Such studies are conducted on different advertisement production stages.

The most preliminary are reconnaissance tests carried out before an advertisement is created, which provide additional information helpful in determining the marketing objectives for the communication and advertising strategy. Such studies supply the data for creating the entire concept of the advertisement. Bypassing this stage may lead to many misunderstandings and the creation of the wrong advertising campaigns. The consumer engagement established through such studies early on in the process increases the chances of creating an advertisement with a coherent message that future recipients will be able to relate to with their needs and values. Depending on what is required, they can be group interviews (giving an overview of the findings) or individual interviews (more in-depth). At this stage, exploratory research with an ethnographic approach is becoming more and more popular (in-home interviews with respondents) giving a deeper understanding of the future recipient of the advertisement (cf. Chapter 3 – ethnographic research).

Qualitative research is also indispensable to testing advertisements during their development. Such studies can be conducted on different phases of the advertisement development process, starting from the earliest phase when weakly structured advertising concepts are tested, right down to the testing of preliminary versions of advertisements in the form of storyboards[1] or animatics[2] (in the case of commercials).

One advantage of testing advertising ideas during the creation process and prior to its final version being created is that it allows misconceived ideas to be scrapped and valid improvements to be made. These studies help prevent very costly mistakes but they do have one flaw: advertisements in their preliminary stage (storyboard or animatic) are often very far from what the final advertisement will look like, which could lead to some good ideas being wrongfully rejected because of the incapacity of the tested material to successfully give across its advantages.

Qualitative methods are much better than quantitative approaches for pre-production testing of commercials at the early stages of the advertising concept creation process. Such tests are still based on very raw materials showing only the general concept of the commercial without any formal elements like music, smooth voices of actors, interesting editing work, or a beautiful model, which affect how the commercial will ultimately be perceived. Because of this, the interviewer has to facilitate the discussion for the participants to talk about the communication layer of the future commercial and not the formal elements of the test materials (e.g., that they don't like the colour of the main character's dress or they don't like that particular breed of dog used in the commercial).

A question that is frequently brought up in the context of commercial testing is which type of interview – group or individual – is more suitable for it. Unfortunately, there is no unequivocal answer to this question. A lot depends on the stage of development of the commercial and the specificity of the advertising message. In the 1990s, most pre-testing of advertisements was conducted within group interviews. At present, mini-groups, dyads, and even individual interviews are increasingly being used for this. If we want to understand viewers' general perceptions of an advertisement, focus groups are usually sufficient. However, if we want to obtain more insightful information, understand the symbolics of specific elements in the advertisement, read the advertising message, individual interviews where other respondents' influence can be avoided would be much better. Especially if we are interested in gathering meaningful data about reading (decoding) the advertising message, such a study cannot be conducted in a group because the opinion of the first person would inevitably affect other respondents.

Experimental quantitative research (small-scale quantitative studies) is also often used in advertisement pre-testing, where the presented advertising material is assessed by respondents in a survey and then answers are provided on scales (Maison, 2007). These studies can be carried out on already completed advertising materials, particularly when standard research tools are harnessed, as they can be used to compare the rating of the advertisement against rivals or with other advertisements of the client. Moreover, the quantitative nature of the measurement bolstered by statistical analysis produces more conclusive results. In the advertising production process (storyboards and animatics), however, if we want to obtain a detailed analysis and penetrating insight into the advertisement, I believe qualitative methods serve this purpose better than quantitative research.

Understanding the consumer: exploration of attitudes, needs, motives, and barriers

Attitude research

Quantitative methods are usually deployed in classical attitude research conducted in psychology and sociology. In marketing, however, attitudes are explored using both

quantitative and qualitative research (Mariampolski, 2001). Qualitative attitude studies are used when new products are being brought to the market – if the product is so new or abstract that there would be no point in having it tested in quantitative studies because it would require more extensive explanations about what the product is and a direct verification of whether the respondents understand the concept. Such studies are designed to unearth the opinions, feelings, and associations triggered by the studied stimulus (product, advertisement). An example could be an attitude test towards a new product which never existed and goes beyond the current experience (or even the imagination) of the respondents. In such a case, quantitative studies could lead to many misunderstandings resulting, for instance, from the respondents failing to clearly understand what the product really is. Qualitative research, however, allows all the questions and doubts of the study participants to be extensively addressed (Nair, 2018; Parker, 2004).

Box 1.6

Qualitative research has evolved from being sociological in nature, endeavouring to describe society and general phenomena, to a more psychological nature, attempting to search for explanations of phenomena by understanding a single consumer and the complex – often unconscious – psychological processes underlying them.

Another area in marketing where qualitative research is suitable is the initial identification of attitudes, which are later verified in quantitative studies. When planning quantitative research concerning a very little known problem, on the whole, qualitative interviews, conducted (usually in a group setting) before the actual design of the survey questionnaire, are extremely useful for pinpointing the relevant areas for the quantitative study and for formulating research problems and topics. Such qualitative research can also provide a great deal of interesting information about the language used by "ordinary people" to describe the phenomenon of interest to us. Thanks to this, many mistakes can be avoided on the level of designing specific questions and adjusting the language to the respondents.

Needs research

Understanding consumer needs is of utmost importance for marketers. A thorough awareness of these needs allows for the development of tailored products perfectly reflecting consumer drives (Ridder & Hoon, 2009; Parker, 2004). The biggest problem is that many wants underlying consumer choices are unconscious or are ones that the consumer him/herself doesn't want to admit to (cf. Chapter 2). Because of this, the only method that can help identify and understand true consumer needs is qualitative research, especially employing advanced projective techniques (cf. Chapter 4).

Motives and barriers research

Another very important issue for marketers is what motivates people to make different decisions (use of services, specific products, or brands) and what are the barriers

preventing them from making these decisions. In other words, a marketer wants to find out why specific brand users choose that very brand (motives), and why rival users fail to use that brand (barriers). In quantitative research, clichéd responses are usually provided that are not a reflection of the real reasons for the use or non-use of a given product (e.g., the statement that a person drinks this brand of beer because it tastes better than competitive beers although blind taste tests confirm that these brands are not actually distinguishable). This is where qualitative research once again comes in to assist us (cf. Chapter 2).

Box 1.7

CASE 1.1 Finding the right insight: the basis for an effective advertising campaign (the campaign concerns a change in attitudes towards people with intellectual disabilities)

TBWA, a global advertising agency which was commissioned by the Polish Association for Persons with Intellectual Disability to develop a social advertising campaign aimed at changing attitudes towards people with intellectual disabilities to become more positive.

The first phase of this study was a diagnosis of attitudes based on conducted quantitative surveys on representative nationwide samples. The results showed that persons with intellectual disabilities are perceived as suffering (53% of the population ascribed this feature to people with Down's syndrome), unpredictable (48%), sad (35%) and slow (34%). The quantitative analysis supplied information on the intensity of the sentiments in the population but they mostly comprised "safe" convictions, which the respondents had qualms in voicing. But it was the qualitative study (FGI using projection techniques like "the world with Down's Syndrome" and "the world without Down's Syndrome" collages) that revealed that there is a fear of "being infected" on the unconscious level. Of course, on the conscious level, everyone very well knew that one cannot be infected by a mental disability but anxiety did appear on the unconscious level, which resulted in reluctance to being with these people and having any physical contact with them (even shaking hands). The discovery of this insight led to laying down the groundwork for the campaign, which took on the motto of: "You can be infected by people with intellectual disabilities . . . but only with passion" and presented happy faces of people with disabilities pursuing their own passions (like playing the guitar, dancing, and cooking). Not only did the campaign have an extensive reach covering film commercial spots (television, cinema), as well as out-of-home media (billboards, public transport) and radio, but it also was very expressive and transparent thanks to harnessing the right insight.

The evaluation of the effectiveness of the campaign (a survey based on a representative sample comparing the attitudes towards people with intellectual disabilities before and after the campaign) revealed that the campaign was noticed by 38% of the Polish population. More importantly still, the perception of people with cognitive impairment changed and became more positive

after the campaign. They were no longer so widely perceived as suffering (a drop in ascribing this feature from 53% to 44%) and sad (35% down to 27%). What increased was the intensity of this group of people being perceived in positive dimensions, like capable of developing friendships (increase from 15% to 30%), and loving (up from 16% to 27%).

The study had many stages and harnessed a variety of research methods (qualitative and quantitative), which led to the creation of one of the most expressive social campaigns awarded the Gold Award for effectiveness at the 2009 Global Effie Awards.

Source: Maison&Partners and TBWA (Maison & Rudzińska-Wojciechowska, 2011)

Exercise 1.1

One of the largest producers of fruit juices on the market is observing a slight but systematic drop in sales of its products. Consider this and try to answer the following questions:

- What could be the possible causes for the drop in fruit juice sales (write down a list of possible causes)?
- Consider which of the causes that you mentioned should be investigated in consumer research and which require analysis of other data (e.g., desk research or analysis of the company's internal data)?
- Consider which of the causes requiring consumer research should be investigated using qualitative research methodologies and which using quantitative research?

Exercise 1.2

Look at the list of research problems below (Table 1.2) and in each case consider if they should be carried out as qualitative or quantitative marketing research.

Table 1.2

Problem	*Method*
1. A European manufacturer of ready meals (frozen and in a jar) would like to launch its products in the Asian market. However, they have no idea whether these kind of products will be met with interest in the country of the target market and who (what type of consumers) will be interested in them.	
2. A tourist company specialising in family holidays would like to find out how holiday decisions are made and what criteria are taken into account.	
3. A company producing a new food source (like algae, insects, khai-nam) wants to grasp the potential and barriers to introducing their new food source.	

Notes

1 ***Storyboard*** – a preliminary version of a commercial in the form of a set of images (usually 5–9), illustrating the most important moments and the main idea behind a future advertisement.
2 ***Animatic*** – a preliminary version of a commercial (although more advanced than a storyboard) in the pre-production phase, consisting of a series of boards with drawings illustrating the most important shots in the future commercial. An animatic often includes a dialogue or narration and a soundtrack, getting closer to the final commercial.

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2 From consciousness to unconsciousness

Evolution in understanding consumers and its consequences for qualitative marketing research practice

Traditional way of understanding the consumer: a rational being aware of own attitudes and needs

In order to explain the choices made by consumers, their decisions were for a very long time viewed mainly from a marketing perspective (the features, price, and distribution of the product) and in terms of economic factors like the consumer's financial resources. This approach was based on the assumption that consumers make rational decisions, hence, if they have less financial resources, for example, they will buy cheaper products, and if they have more, they will purchase more expensive products. This approach also led to the belief that products with an objectively higher quality should sell better than worse quality products. However, marketing practice offers substantial evidence that contradicts these assumptions. Individuals often make choices that objectively are not the best possible and fail to take full advantage of all the information potentially available to them during this decision process.

Box 2.1

Thinking about the consumer in a traditional way, as a person taking fully conscious and rational decisions is a trap in marketing research. Basing conclusions from research directly on the declarations of a respondent may lead to the wrong marketing decisions being taken.

The classic model of consumer decision making (EKB – after the first letters of the surnames of its authors Engel, Kollat, & Blackwell, 1968; Kotler, 1994; Peter & Olson, 1996; Solomon, 2003), which prevails in consumer behaviour textbooks, strengthens the persisting belief that the consumer is (just) a rational being. This model assumes that product choice and purchase decisions are a direct (and logical) consequence of the consumer's passage through the five stages of this process: problem recognition, searching for information, alternative evaluation, final product choice (purchase), and post-decision evaluation. This model clearly assumes that there is a considerable degree of rationality behind the consumer's decision, which is a consequence of the information gathered in stages two (searching for information) and three (alternatives evaluation). It also assumes a rational analysis (of strong and weak product attributes), and the result of this almost mathematical analysis is choosing the

product that objectively has the most desirable characteristics. However, consumer choices often are made by sidestepping this logical and rational analysis of possible options, or the consumer ends up choosing an item that would never have been of interest to the consumer had the decision been logically analysed.

Another popular and classical model that also provides a rational explanation of consumer attitudes and choices is the theory of reasoned action developed by Martin Fishbein and Icek Ajzen (1974; Ajzen & Fishbein, 1980). This model assumes that a person's attitude towards an object stems from their convictions concerning its features and the values attributed to them (how important a given feature is for the person – their weight). The methodological implications of this model is that we can actually ask the consumer about his/her evaluation of the product's attributes (features) and, based on the declared significance of these attributes for the consumer, we can calculate their overall attitude towards the object (i.e., the sum of attributes multiplied by their weights). According to the theory, these calculations also allow us to identify the product from a given category range towards which the consumer has the most positive attitude and, as a result, which the consumer is most likely to choose (buy). Unfortunately, both marketing and consumer research practice shows that these interdependencies are not so simple and the highest utility of a given brand or product mathematically calculated does not necessarily translate into the consumer's use of this brand or product.

A similar assumption regarding the cognitive foundations of consumer attitudes has for many years guided the best-known theory of advertising effectiveness – AIDA (an acronym which stands for Attention, Interest, Desire, and Action; Smith & Taylor, 2004). The AIDA model is widely used to describe advertising effectiveness and assumes that effective advertising requires the viewer to go through a sequence of stages, which include the consumer becomes aware of the advertising that has caught his/her attention (A-attention), the consumer becomes interested in the advertising (I-interest), the consumer becomes convinced that he/she desires it to possess the information (D-desire), and, finally, the consumer will take action (A-action), which means making a purchase. In this model, buying the product is a consequence of having gone through all these earlier stages. Another equally popular model used to explain the impact of an advertising is DAGMAR, which was developed in 1961 by Russell Colley (1961), who assumed that in order for an advertisement to work, the receiver must be aware of the brand and company and must have sufficient knowledge about the product and its benefits. Following this, the action undertaken by the consumer under the influence of advertising (i.e., buying the product) is a result of their conviction about the product benefits.

Both these still often cited models (AIDA and DAGMAR) assume that in order for an advertising campaign to be effective (convincing consumers to purchase the product) the consumer must go through a number of stages which require involvement of the cognitive process, attention, information processing, and accumulation of knowledge. What is crucial in those models is the assumption that an emotional attitude towards the advertised product (a preference) can only be established on the basis of cognitive processes and that in order to purchase the product, the consumer has to go through each of these subsequent stages. The consequences of these fallacious assumptions – from the perspective of what we know today about consumer decisions – the marketing research methods commonly used to explore factors influencing the choice of a product of a given brand, and the impact of the advertising campaign are often inappropriate. Probing the consumer directly on this often leads

to false explanations not because the respondent wants to hide anything but rather because they are unaware of the many processes taking place inside them and do not have introspective access to them.

Box 2.2

Drawing conclusions on consumer phenomena based only on declarations and on what the consumer says directly means that implicitly an incorrect assumption has been taken, that the consumer is conscious of his/her attitudes, motives, and needs and has introspective access to them.

Similar problems of using inappropriate research methods are encountered when investigating the impact of advertising on the choice of the product. This is something that can be observed during pre-test research conducted prior to the launch of a campaign (Maison, 2005) and aimed at estimating the future effectiveness of the advertisement, as well as during post-test research after the campaign is finished to evaluate its effectiveness (Davis, 1997; Haskins & Kendrick, 1997). Pre-test research (qualitative and quantitative) focuses on the advertisement copy elements that consumers notice, on their opinions about them, and about the product features explicitly shown in the advertisement. The objective of all this is to diagnose whether the copy attracts attention and whether it delivers the necessary product information. It is assumed (based on old theories) that better recall of the copy and of the advertised product features should translate into more effective copy. We now know that most of the processes concerning advertising impact take place outside the consumer's conscious control, at a low attention level accompanied by many distractors (Heath, 2001). That is why introspection- and declaration-based advertising research methods deliver very questionable results due to the fact that they test copy reception in very different conditions (high involvement, conscious information processing) from the way advertising works naturally (low involvement, low attention).

A similar problem can be observed in post-test advertising research intended to evaluate the effectiveness of an advertising campaign (after it has been run). The evaluation of advertising effectiveness is usually based on indicators like brand awareness or advertisement awareness, as well as the understanding and recall of the message being communicated. Unfortunately, these indicators do not always denote that the campaign was effective. Consumers might be very familiar with the brand, have good advertisement recall, be able to flawlessly reconstruct the brand attributes communicated in the advertisement, but this may still fail to translate into a positive attitude towards the advertised product or into their actual behaviour leading to the purchase of the given product. Hence, an advertisement that engages the viewer on the cognitive level may turn out to be completely ineffective. On top of this, apart from the messages explicitly communicated in the advertisement (e.g., "this is an affordable, good family car") various non-verbalised and non-conscious associations can also be developed (e.g., "this car is for losers"). Thus, basing research on consumer statements and responses alone would be the wrong route to take since the consumer is unaware of these non-verbalised and non-conscious attitudes held by them, making it difficult for them to verbalise their true convictions.

Box 2.3

Traditional models of consumer decision making and how advertising works often lead to the application of improper methods of marketing research and to searching for the wrong research information, which are often inadequate to the marketing aims.

New approach to the consumer: an emotional being not fully aware of own attitudes, needs, and motives

The conviction that the consumer is a rational being and that cognitive processes prevail in his/her thinking still continues to be commonplace in most consumer behaviour textbooks, hence, this view is still widespread among marketing researchers and marketers (Solomon, 2003). It is unfortunate that most consumer behaviour textbooks are still based on psychological theories originating from the first half of the 20th century. Much progress has, undeniably, been made in psychology, especially with respect to understanding unconscious and automatic processes, implicit attitudes, and the significance of emotions in decision making (Bargh & Chartrand, 1999; Bargh, Chen, & Burrows, 1996; Hsee, Yang, Li, & Shen, 2009; Kahneman, 2011; Thaler, 1985; 1999). However, these new insights have not permeated some academic disciplines enough (e.g., consumer behaviour or marketing) and are slowly taking root in marketing research practice.

Over the past 20 years, all the evidence provided by psychology with respect to the field of social cognition, the psychology of emotions, cognitive processes, and observations from marketing practice call for the assumptions concerning the rationality of most consumer decisions and their introspective access to these processes to be revised, which will undoubtedly have major repercussions for marketing research. It is a well-known fact today that consumers have a very low level of awareness of the needs and motives driving their attitudes and choices. Apart from this, consumer choices are rarely carefully considered and consciously made in the sense that they are seldom based on an accurate analysis of the product information available to them (Ariely, 2009; Dijksterhuis, 2004; Dijksterhuis, Aarts, & Smith, 2005). An interesting example of heuristic-based decision making that does not draw on careful information processing can be found in a story about incorrectly printed discount coupons (Cialdini, 1993). As a result of a printing error, some coupons contained information about the price discount while others did not. Much to the company's surprise, both coupons produced the same amount of orders. This shows that the coupon alone triggered an automatic reaction to place an order, disregarding any rational analysis of whether or not the offer was financially attractive.

Box 2.4

Automatic and unconscious consumer processes do not mean that the consumer has deficits, that they are irrational or stupid. On the contrary – they constitute adaptive processes, which effectively protect them against sensory overload.

The research outcomes on the effects of music on shopper's behaviour conducted by Milliman (1982) showed that stimuli outside of a person's conscious awareness can trigger automatic behaviour without the person being aware of its source or its impact on their behaviour. In the natural experiment carried out in a selected supermarket, different music was played over a two-month period. The music varied in terms of tempo, ranging from 90 to 180 beats per minute with a "no music" control condition. When fast music was played, consumers clearly moved much faster through the shop compared to when peaceful music was played (a 17% increase). More importantly, they spent 38% more money when peaceful music was played. It is quite probable that many consumers would say that they prefer faster and livelier music on the conscious level, however, it turned out that on the unconscious level it was actually the slower music that gave rise to positive emotions and a relaxed atmosphere, leading consumers to move around the store more slowly and to spend more money while they were there.

This gradual transition in the way we look at contemporary consumers coincides with the changes that have recently taken place in psychology in the way in which the human person is perceived. The image of "Man as a Scientist" ("Man as an Intuitive Statistician"), which was dominant in 1950s psychology assuming that the human being first forms hypotheses and then empirically verifies them (Peterson & Beach, 1967) coupled by perceiving the human person through a computer analogy now belong to the past. They have been replaced by discourse on the unconscious, implicit, and automatic processes taking place in the human person, as well as decisions based on heuristics (Ariely, 2009; Kahneman, 2011). Some psychologists proffer that the individual does not even check the hypothesis formulated by them, simply confirming it selectively with those arguments that comply with his/her formulated hypothesis. It is a well-known fact that the consumer often knows on the unconscious level which product brand he/she wants to buy before the conscious decision-making process even begins (Dijksterhuis, 2004; Dijksterhuis *et al.*, 2005). The consumer then proceeds to search for information that would justify the unconscious choices made by them (in the phase which I refer to as post-rationalisation). This process can often be observed in marketing research.

These mental shortcuts and simplifications, despite the risk of making mistakes, perform an adaptive function enabling a person to deal with the complex and complicated environment. The automatic and selective functioning of the mind has, to a certain extent, been forced by contemporary reality. The human mind is simply unable to process the vast amount of information that people today are subject to because of its limited capacity, therefore, it has to make numerous simplifications and be extremely selective to function properly.

Discovering the unconscious mind and its implications for qualitative marketing research

As mentioned earlier, psychology has recently uncovered much evidence of the existence of unconscious and automatic processes in the human person. The findings of such studies are paramount to understanding the consumer and have important consequences for marketing research. Let us take a closer look at a few examples of the psychological phenomena that illustrate the power of the unconscious and of automatic processes. Although this knowledge does not translate directly into marketing, it does help in gaining a better understanding of the consumer, and in

interpreting their opinions, attitudes, and behaviour, and, ultimately, in conducting more effective marketing research.

Mere exposure effect

Classic research regarding the mere exposure effect carried out by Robert Zajonc (1980), an American Professor of Polish origin, demonstrated that an individual does not always know why he or she likes something. In a series of experiments, the subjects were presented a set of Chinese ideograms, some of which were shown only once, while others several times. The participants were then shown the next set of ideograms (some of which had already been presented during the first series) and they were asked how much they liked each one. It turned out that there was a greater preference for ideograms displayed several times during the first series compared to those presented only once or not at all. It should be stressed that this effect was observed regardless of whether the individual was aware that he/she had seen the given ideogram earlier or not.

Implications for (qualitative) marketing research

This simple effect is of huge importance for understanding respondents' reactions to new products and communication (Shapiro, MacInnis, & Heckler, 1997). When testing new packaging, new graphic symbols, or new advertising ideas in focus groups, marketers often cannot comprehend why respondents choose the most banal solutions, usually those that they are well acquainted with or at least resemble something familiar. This often is a simple consequence of the mere exposure effect where familiar things evoke more positive emotions and evaluation.

The mere exposure effect is, however, unavoidable in marketing and qualitative research and the way to deal with this effect is to be mindful of it when analysing and interpreting interview data. Let us imagine that we are testing three packaging proposals, one of which is more unconventional and rules-breaking, while the remaining two are rather conservative. It is highly plausible that the respondents will react most negatively to the unconventional one. In this situation, researchers should not formulate a recommendation based on the most preferred option but should rather consider the aim of changing the packaging and confronting respondents' opinions with the marketing objectives. If the objective is to change the product's image in the direction of a more modern, avant-garde brand, the packaging that is perceived by respondents as unusual, weird, or different should be chosen (despite being viewed negatively or positively by the respondents).

The mere exposure effect also has to be taken into account when selecting materials for testing in the research. If stimuli that are already available in the market (e.g., existing newspaper layout or logo) are presented in testing materials alongside new proposals (e.g., a new layout or logo), it can be expected that according to the mere exposure effect, it will be the prevailing solutions that will evoke more positive reactions (unless, of course, they are clearly perceived as being bad). Therefore, because of the mere exposure effect, research questions along the lines of "what do you like the most" should be avoided and no marketing decisions should be made on their bases. On the contrary, much more attention should be paid to what the tested stimulus actually communicates and what associations it evokes. This manner of conducting

the discussion will minimise the impact of the mere exposure effect on the qualitative research findings.

Unconscious information processing: subliminal and peripheral stimuli

The research on subliminal information processing shows without a shadow of doubt that the human brain is able to receive stimuli that remain unregistered on the conscious level (Dijksterhuis, 2004; Murphy & Zajonc, 1993; Winkielman, Berridge, & Wilbarger, 2005). Sheila Murphy and Robert Zajonc showed in their psychological experiment (1993), which is probably the most classic study in this respect, that subliminally presented affective-type stimuli (faces expressing positive or negative emotions) can influence the evaluation of objects that follow afterwards (Chinese ideograms, the same stimuli as used in mere exposure effect research). The participants were presented with a series of Chinese ideograms and, depending on the research conditions, the ideograms were preceded by a face expressing positive or negative emotions (shown for 4 milliseconds – subliminal exposure). It turned out that the ideogram preceded by a face expressing positive emotions (unseen on the conscious level) was liked more than the same ideogram preceded by a face expressing negative emotions.

Peripheral stimuli can have a similar effect on humans. However, they differ from subliminal stimuli: they are presented above the individual's threshold for conscious perception, but even though they can potentially be seen, they are not registered consciously (because they are outside the individual's attention, for example). When surrounded by numerous stimuli, the human cognitive system focuses on those of greater importance and discards the less important ones (peripheral stimuli). A weak stimulus that is not strong enough to attract the attention of the consciousness becomes a peripheral stimulus, or a stimulus to which the person unconsciously ascribes less significance. The human pupils are a classic example of peripheral stimuli. Depending on their size, the same person can be perceived in a different way (e.g., as being more or less attractive). However, it is not necessary for the person making the judgement to be aware that it is the size of their pupils that is influencing their judgement (Niedenthal & Showers, 1991).

Implications for (qualitative) marketing research

The knowledge gained from experiments on subliminal and peripheral stimuli shows beyond any doubt that the human brain can register stimuli that it does not need to be conscious of (e.g., the exposure was too brief or it was imperceptible). One of the areas of qualitative marketing research where being mindful of peripheral information processing is necessary is research regarding the reasons for choosing or rejecting specific products. In qualitative marketing research, we are often asking why the consumer purchased a product of a given brand and even more often why they failed to buy this particular item and opted for the competitor's offer. The consumer, when answering such questions, taps in to his/her conscious memory resources and often replies in agreement with the image that they have of themselves of a rational person fully aware of their own needs. This means that they will refer to the functional features of the product and reason their choice with statements like "because it's the best product", "because it suits me", "because it's got the right technical parameters", etc.

In reality, their choices may very well be influenced by the advertising or brand image of the product, which the consumer may actually be completely unaware of and they may not even be able to recall any advertisement of this particular brand. Such a brand image or elements of a commercial, despite not being consciously registered by the consumer, could influence their decision in a peripheral way. This should not, by any means, lead to disregarding respondent statements in marketing research but rather to listening to them mindful of the psychological processes and mechanisms that can exert a real influence on their opinions and decisions.

Box 2.5

If something is happening automatically and outside a consumer's consciousness, it really isn't worth asking them what this process looks like because all we can find out are the post-rationalisations, which form the false image of reality.

Immediate affect vs. deliberative affect

After many years of discussions on what the first emotion or cognition is (Lazarus, 1984; Zajonc, 1984), neuropsychologist Joseph LeDoux (1996) delivered indisputable arguments that emotions can appear earlier than the conscious cognitive reaction (thoughts). Research on animals revealed that there are direct interconnections in the brain between the representations of stimuli and the areas responsible for affective reactions (the amygdala). This means that an affective reaction to a stimuli may completely bypass any cognitive processing. According to LeDoux, three types of reactions can emerge in response to an external stimuli: (a) low-road affective processes – located in the brain's limbic system (through the amygdala), which appear suddenly and are manifested by lower-level affective reactions; (b) high-road cognitive processes – which engage the cerebral areas of the brain and the processes that it involves, like thinking, drawing conclusions, awareness, thus, strengthening or weakening lower-level affective reactions; (c) high-road affective processes – evoked by the results of high-road cognitive processes (post-cognitive affect), which are slower compared to low-road affective reactions.

Psychologists studying human cognitive processes in social context (social cognition), not directly involved in actual brain research, also arrived at similar conclusions. Roger Giner-Sorolla (1999) introduced the differentiation between immediate affect and deliberative affect. Just like in the previous notion, immediate affect concerns the feelings and emotions that are quickly, automatically, and effortlessly elicited in immediate response to the encountered stimulus. A deliberative affect, on the other hand, includes feelings and emotions that are activated later and more gradually.

Implications for (qualitative) marketing research

The marketing implications of the above described discoveries primarily concern the very manner of conducting qualitative interviews and the type and sequence of the questions put to the respondents. When respondents are asked about their feelings and emotions, for example commercial, positioning concept, brand, or product, a

completely different set of emotional reactions could be obtained depending on when the question itself is posed: whether before the actual discussion on the research topic (then capture primary affect, lower-level affect) or after this discussion (then capture secondary affect, higher-level affect). These two types of affect may or may not be consistent. In marketing research, we are generally interested in capturing the primary, pre-cognitive emotions elicited automatically, which lie beyond a person's control. Hence, it follows from this that we should be asking about emotions before the actual discussion on the topic is undertaken (before questions like: "what do you think?", "what's your opinion on this?", "what are the advantages and disadvantages of the product?"). We need to remember that the secondary affect is often corrected by social norms or a person's self-image (e.g., of being a rational person). Thus, asking respondents about their feelings and emotions before breaking into discussion is very good practice in marketing research (e.g., by asking them to put their feelings down on paper). This is especially important in focus group interviews because it ensures that everybody has the same amount of time to think about the topic as, once discussion ensues, it is very difficult to capture primary emotions. Moreover, because primary emotions are automatic and often difficult to verbalise, to capture pre-cognitive emotions different types of non-verbal enabling techniques should be used during the interview course (see Chapter 4).

Box 2.6

Oftentimes, before a consumer actually begins the conscious decision-making process, they already know, on the unconscious level, which brand they want to buy. In that case, searching for information about products is subject to collecting arguments supporting the rightness of the unconsciously made choice.

Explicit vs. implicit attitudes

The end of the 20th century also brought an important breakthrough in attitude research. The new understanding of attitudes as unconscious, unintentional, and automatic phenomena is linked to the shift in the way of thinking about the human being that has been emerging in psychology since the 1980s – from viewing the person as a rational being, conscious of the psychological processes taking place and remaining in control of these processes (*homo oeconomicus*), to accepting the fact that there are many unconscious and uncontrolled areas in the human (*homo automaticus*).

For many years, the tri-component attitude model dominated in psychology and sociology, which assumed that an attitude is composed of three very strongly interconnected components: the cognitive (what a person thinks), the emotional (what a person feels), and the behavioural (how a person behaves) (Allport, 1968). However, marketing research practice and scientific research showed that there often is a marked discrepancy between these components (Ajzen & Fishbein, 2005; Bohner & Wänke, 2002). A meta-analysis of 88 attitude-behaviour studies carried out by Kraus (1995) revealed that the average correlation between attitude and behaviour is on the level of $r = 0.38$. Whether this relationship will be very strong or almost non-existent depends on a variety of different factors: the type of attitude, as well as the kind of measurement applied.

For instance, studies with aggregate data about many different behaviours result in greater attitude-behaviour consistency (Ajzen & Fishbein, 1980). Another factor influencing this consistency is how specific the questions pertaining directly to behaviour are (Davidson & Jaccard, 1979). A weak attitude-behaviour relationship undermines a lot of consumer behaviour marketing research based on investigating attitudes towards products, brands or advertisements assuming to predict the likelihood of them buying the product (Bohner & Wänke, 2002; Sheeran & Orbell, 1998).

Considering that people feel, think, and behave differently towards specific attitude objects depending on the situation they find themselves in, the question is raised as to what their true attitude towards a given object is? If somebody believes that chocolate cakes are delicious (positive feeling – emotional level) but fattening and unhealthy (negative opinion – cognitive level) and they sometimes eat them and, at other times, refrain from eating them depending on the situation they are in (behavioural level), one may wonder what their true attitude towards chocolate cakes is? Indeed, this question is very difficult to answer unequivocally because most attitudes are not so simple and straightforward to be neatly categorised by researchers as positive or negative but have many different facets. Many attitudes are complex and contain both positive and negative components, referred to as ambivalent attitudes (Shiv & Fedorikhin, 1999). Hence, every component of an attitude can be regarded as the true attitude, although they may lead to completely different behaviours.

The weak relation between attitude components drove scientists to look for new attitude concepts. First of all, attention was drawn towards the unconsciousness of attitude sources (e.g., subliminal priming, Murphy & Zajonc, 1993; mere exposure effect, Zajonc, 1980), the automatic character of attitudes (Bargh, 1997), and their dualism (Chaiken & Trope, 1999). The dualism of attitudes assumes that the same person can have two different attitudes towards an object at the same time, both a conscious one and an unconscious one. Anthony Greenwald and Mahzarin Banaji introduced into psychology the implicit attitudes concept (Greenwald & Banaji, 1995). Implicit attitudes are defined as unidentified (or incorrectly identified) traces of a past experience that may influence reactions even if the experience is no longer remembered and unavailable on the conscious level (Maison, Greenwald, & Bruin, 2004; Maison & Gregg, 2017). Such an understanding of attitudes clearly differs from the traditional approach prevailing in psychology and sociology since the 1930s, and still held to be true by some marketing researchers, where attitudes were considered to be beliefs which the subject is fully conscious of (Ajzen & Fishbein, 1980; Allport, 1954).

Adopting the assumption about the existence of implicit and automatic attitudes (i.e., uncontrolled and inaccessible to consciousness and introspection) forced researchers to search for new methods for studying attitudes (Devine, 1989; Fazio, Sanbonmatsu, Powell, & Kardes, 1986). They first moved away from measurements based on the self-descriptive questionnaire and respondent declarations towards indirect measurements where the subject is not aware of what is being measured and where the outcomes are independent of the participant's conscious control. Next, they introduced computers and deployed reaction times as attitude-evoking indicators (Fazio, 1990; Fazio *et al.*, 1986; Maison *et al.*, 2004; Maison & Maliszewski, 2016). Although, reaction-time based methods cannot be applied in qualitative studies, qualitative researchers have other tools at their disposal – e.g., projective techniques – that bypass respondent declarations and actually detect implicit attitudes (see Chapter 4).

Implications for (qualitative) marketing research

When conducting marketing research, researchers must bear in mind that examined consumer attitudes are often implicit and unconscious. There are two important consequences of this for research. First, when asking the respondent directly, we do not always uncover his/her real attitudes and what we capture are often only post-rationalisations of implicit attitudes. The story behind the launch of the first cake mix powders is a perfect example of post-rationalisation as a consequence of unconscious consumer attitudes (Morgan, 1998). The product in question started off with very meagre sales. During marketing research, consumers pointed out the product's advantages (quick and easy to prepare) but also mentioned its "artificial" taste and used this to explain why they were not interested in buying it. However, once the consumers tasted the cake without knowing that it was made from a cake mix (blind test), they couldn't differentiate between the cake made from cake mix and the one made in a traditional way (demonstrating that the real problem was not actually its taste). The projective technique showed that the underlying factor making it difficult for the housewives to accept the product was their unconscious belief that something as special as a cake for their family should require more time and effort. The "artificial taste" opinion was a typical post-rationalisation of a negative implicit attitude

Table 2.1 Various psychological phenomena and their implications for qualitative marketing research

Psychological phenomenon	*Consequences*	*Implications for marketing research*
Mere exposure effect	• Rejecting new, unconventional solutions; preference for familiar options	• Appropriate selection of research materials (especially in packaging and logo testing) • Being mindful of this effect in data analysis and recommendation building
Unconscious information processing: subliminal and peripheral stimuli	• Declared reasons for accepting or rejecting products may not be true • Declared sources of attitudes may not be true	• Interpretation of results in light of unconscious information processing knowledge • Use of projective techniques (especially non-verbal, conducted individually)
Primary vs. secondary emotions	• The same object can evoke different emotions depending on whether they are primary or secondary emotions	• The manner of conducting the interview • The order in which the questions are put to respondents (e.g., asking about their emotional reaction first, followed later by their opinions)
Implicit attitudes	• Apart from voiced conscious attitudes, the consumer can also have unconscious, implicit attitudes that may influence their behaviour	• Looking for indirect measurements: reaction times, projective techniques, etc.

towards the product. The consumers – apart from their articulated and conscious belief regarding the product ("a convenient cake mix powder quick and easy to prepare") – also had implicit and emotional attitudes ("when I bake a cake using a cake mix, I am neglecting my family; I'm a bad housewife"), but they were unaware that these very attitudes were actually driving their behaviour.

For this reason, if we want to understand unconscious implicit attitudes, we have to apply tools that are not limited to respondent declarations (see Table 4.4). Projective and enabling techniques, particularly those facilitating automatic responses instead of deliberated (see Chapter 4), are highly useful in such research.

Marketing evidence for the existence of unconscious and automatic processes

Studies of implicit attitudes and automatic processes carried out in scientific research deal mainly with problems which are typical for social psychology: stereotypes and national or ethnic bias and self-evaluation. However, implicit attitudes and automatic processes can also be found in the field of consumer attitudes. A considerable amount of psychological and consumer research carried out during the past 20 years has delivered sufficient evidence that implicit attitudes and automatic processes should be taken into account in consumer behaviour theory and marketing research practice, and it should be accepted that the consumer has no introspective access to many areas (Maison & Gregg, 2017; Perkins, Forehand, Geenwald, & Maison, 2008).

Marketing practice, especially with respect to introducing new products into the market, offers much evidence showing the complexity of attitudes, limited consciousness regarding their sources, and their weak ties to behaviour. Every marketing researcher knows just how difficult it can be to predict whether or not a given product will be successful after its launch when relying on consumer interviews alone. A frequently cited example is that of Sony, which released the Sony Walkman against the opinions of potential users who expressed their disinterest in the product during conducted research. This illustrates the very complexity of consumer attitudes and also proves that the conscious consumers' thoughts and attitudes towards the product do not always go hand in hand with their actual behaviour.

Brand attitudes, which make up the core of marketing research, are a field where implicit attitudes and automatic processes prevail. When thinking about different brands, the consumer refers to a complex knowledge system rooted in numerous convictions connected with specific brands, relating both to the product features (e.g., size of car, power of engine) as well as to the features of its brand image (e.g., Volvo – safety, Jaguar – prestige, Land Rover – individualism and independence, Fiat – affordable). Aside from the verbalised and conscious brand opinions, the consumer also holds many unconscious emotions, convictions, and attitudes that he/she is completely oblivious of. Nevertheless, despite being unconscious, they can very well influence consumer decision and choices. Since a big part of the brand image is unconscious, it cannot be examined using traditional research methods like questionnaires.

Brand attitude, especially its hidden dimensions, is of immense importance since it can affect consumer choices and behaviour. Producers often wonder why, against all logic, consumers sometimes choose an evidently inferior product. The consumer may often see little to no differences between specific brands leaving them at a loss as to which product they should choose. As a consequence, they end up choosing a given

product thinking that their choice was random. The real reason behind their choice may very well be their implicit attitude towards specific brands and products, exerting an uncontrolled and unconscious influence on their decisions.

Just as consumers have a very limited awareness of just how much brands actually influence their choices, they are also oblivious of how strong the influence of advertising can be on their decisions. In focus group interviews, one of the most frequent statements in response to a commercial is: "Advertising has no effect on me" or "I don't buy things as a result of advertising". Similarly, the investigation of the actual factors that influence the choice of specific products, brands, or advertising are also rarely mentioned in quantitative marketing research and, if they do crop up, it is usually at the very end. Consumers usually point to specific product features, quality, and price (especially if it is low). This does not mean that consumers are not driven by the brand or advertising, but merely that they are usually unaware of this influence and are quite certain that they are driven by more "rational" factors.

Advertising is an indisputable source of implicit attitudes – especially television commercials. This is a communication tool where a very complex message about a specific product is created within the space of 30 seconds or less. A part of this message is coded verbally (in the form of an advertising slogan, spoken text expressed by actors, or voice-over) and another part non-verbally (colour, music, etc.). Some of the non-verbal elements of the advertisement are picked on purpose with full awareness of their communication value. Each commercial also contains elements intended only as a creative backdrop to the main message. Consumers also read these elements, often unconsciously, and they too can influence their brand attitude, sometimes in contradiction to the intentions of its authors/producer (Heath, 2001). Designers focus on the creative aspects, often forgetting that each and every element of a 30-second commercial is a potential (though not always intentional) source of advertising message conducive to developing simplified impressions and implicit attitudes, as well as being a source of automatic reactions to the advertising message. Implicit consumer attitudes can also arise from a variety of other marketing communication elements, such as packaging, logo, product price, its distribution, and in-store display, even sponsoring or public relations. All this can shape the consumer's attitude towards the brand, including unconscious attitudes.

Box 2.7

When advertisement makers are engrossed in the creation process of a commercial, they often forget the fact that every element of a 30-second commercial is a potential (although not always intended) source of an advertising message that affects the creation of attitudes (not always conscious) towards this product and brand, but this too is a source of the automatic consumer reactions to a product.

Another source of implicit attitudes is the product price. Consumers are often not aware of the fact that they draw their product quality impressions in an unconscious manner, based on its price. There are numerous examples of marketing errors when a product was not accepted by the market not because of its objective features but

because of the negative perception of its quality resulting from setting the wrong price (Thaler, 1999; Urban & Hauser, 1993). An inappropriate price is not always a price that is too high for people to pay or for people to think it worth this price. An inappropriate price is also a price that is too low, leading consumers to arrive at the conclusion, usually unconsciously, that the product must be of a poor quality. Robert Cialdini (1993) gives an example of a shop where a product was priced incorrectly (instead of a 50% discount, the price was actually doubled). Much to the surprise of the salespeople, the product suddenly roused great interest among shoppers and the entire stock was soon sold out.

Box 2.8

Despite the majority of marketers agreeing with the statement that the consumer is often unaware of their needs, emotions, motives, and reasons for taking decisions, they often insist on directly asking respondents about it in research, assuming that consumers are capable of giving true answers to such questions.

The packaging of the product can also be a factor shaping implicit consumer attitudes. Packaging designers are mainly guided by aesthetics. It should be remembered, though, that almost every element of the packaging may communicate something to consumers that they may not be even aware of but which influences the way they think about the product. An example of this in qualitative research (particularly in focus group interviews) is when respondents were tasked with grouping shampoo packaging.[1] Despite failing to see any strong relation between the packaging and the shampoo's features on the conscious level, an analysis of the results of this task revealed that they imagined different product characteristics and a different product quality of the shampoo depending on the form of its packaging. Packaging with sharp edges implied a shampoo of inferior quality compared to rounded packaging. Transparent packaging and content implied herbal shampoos based on natural ingredients, while non-transparent packaging and a pearl-like shampoo was associated with a shampoo produced using state-of-the-art technology.

Evolution of qualitative research: from collecting information to the search for understanding

The clear evolution in qualitative research is a consequence of the changes that have taken place with respect to understanding the consumer and the psychological processes accompanying consumer decision making. These changes relate to the gradual shift from focus group research to other qualitative methods that can replace it, to the actual changes being introduced to focus group research as such, which now seems to bear close to no resemblance to what was first described in 1946 by Robert Merton and Paul Lazarsfeld (Merton & Kendall, 1946).

The changes that can be seen in qualitative research result largely from the shift in the information sought after in research: from sociological information describing society and general phenomena to more psychological information, attempting

to understand the individual consumer and the complex – and often unconscious – psychological processes taking place inside them: values, needs, and motives underlying the decision-making process. In this case, what the group says is less important than what the individual is saying. This change of perspective does not exclude the generalisation of findings. However, the basis of such generalisations no longer is the consistency of opinions inside groups but the fact that they are repeated during subsequent interviews, both individual and group (Packer, 2008; Seidman, 1998). In other words, it can be said that qualitative research has evolved from being sociologically focused, attempting to describe society and general social phenomena, to more psychologically focused research, endeavouring to understand the individual consumer and the complex – often unconscious – psychological processes taking place inside them.

Number of participants and number of interviews

The first change that took place in qualitative (particularly focus group) research over the last 10 to 20 years is reducing the number of interview participants. In the 1990s, focus group interviews were commonly conducted with groups of 10 or even as many as 12 people. The approach to focus group interview value and cost-effectiveness at that time was linked to the participant numbers: the more, the better. With time, however, it became increasingly more apparent to clients that, paradoxically, a focus group interview with a smaller number of respondents is more beneficial and delivers more valuable information than larger groups. The fewer the participants, the more the researched problem can be probed, the more penetrating are the questions, and the greater the understanding is gleaned about the respondents and the researched problem. Groups with fewer participants (e.g., five–six) also facilitate every person being "used" as everyone can be actively involved in the discussion. Groups of eight to ten people, however, will always have inactive participants simply because of the group dynamics, even if such inactive participants are specifically encouraged by the moderator, their answers are often of little value in the end.

Nowadays, group interviews with more than seven people are hard to come by and many moderators feel most comfortable with a five–six-person group. However, the decrease of participant numbers is not so much because of the actual comfort and convenience of conducting the interview but mainly down to the very quality of the information gleaned from the research. This change has brought specific organisational consequences, the first of which is in the respondent recruitment process where respondent quality takes precedence. In small groups, every single respondent has a greater value and the prospect of losing even one person (due to bad recruitment) becomes problematic. The second, despite the smaller number of participants in the group, is that more information is collected, often calling for a greater probing and, as a result, requiring more time-consuming analysis. For this reason, fewer respondents do not automatically translate into lower costs of research. Quite the opposite is often the case and interviews with fewer participants cost just as much and sometimes even more than interviews with more participants. This usually concerns complex research problems requiring detailed and in-depth analysis (not just reporting respondent statements), and the interviews themselves are usually longer (e.g., 2–2.5 hours), hence, there are also more issues that have to be discussed and analysed.

Box 2.9

At present, focus group interviews include less and less participants and they are seldom conducted with more than seven participants. This is not only because of the ease in facilitating such interviews but most of all due to the quality of the information gleaned from the smaller group setting.

The evolution which has taken place in qualitative research arises from a better understanding of the specificity of this research and from no longer treating it as "inferior to quantitative research", on the contrary, as an invaluable research method in its own right, governed by its own rules (see Chapter 1). The approach to qualitative research, its understanding, and use should no longer be in analogy and comparison with quantitative research. First of all, it must break away from the law of large numbers sacred in quantitative research. This law leads to thinking that the bigger the sample, the better it is for research quality. Indeed, quantitative research strives for as big a sample as possible to increase research reliability. However, there is no place for this rule in qualitative research. As already mentioned earlier, in qualitative research, fewer respondents in focus group interviews (conducive to being more perceptive and inquisitive, and to obtaining in-depth information) often produce much more useful research results than groups with more participants. In line with this mode of thinking, increasing the number of conducted interviews does not result in higher quality and reliability of qualitative research. It is certainly not the case that the more groups that are held, the better the research. Research with fewer interviews but with a perfectly tailored research schemata will deliver better answers to relevant research questions than having more groups which haven't been prepared for or conducted correctly (see Chapter 5).

Interview duration

The decrease in the number of focus group participants is accompanied by an extension of the interview duration. These days, typical interviews rarely last the standard 1.5 hours. It is increasingly common for group interviews to take 2 to 3 hours and even as many as 4 hours. Researchers who are new to such long interviews are concerned about how the respondents involved cope with such a marathon. It turns out, however, that if the interview is well constructed with a logical flow from one topic to another and deft deployment of different projective and enabling techniques (see Chapter 4), the respondents have no problems at all with such a long discussion. In fact, if the discussion is engaging and captivating, the respondents are left astounded that the time has flown by so quickly. Experience shows that whether or not the respondents find the discussion involving or boring depends largely on the moderator, if they listen to the respondents and show genuine interest in what they are saying, communicating that what they are saying is really important. It depends also on the structure of the discussion, if it is free of repetitions and containing involving tasks, rather than focusing on the subject itself. It must also be noted, however, that there naturally are more and less involving topics for the respondents. The topics

emotionally significant for the respondents trigger greater involvement, for example, concerning their pets (cats and dogs, etc.) or issues relating to the local community (e.g., new and interesting solutions in the respondent's district or neighbourhood).

Not only is the duration of focus group interviews becoming longer but also of individual depth interviews. Individual interviews were taking as little as 45 minutes to 1 hour until very recently. Today, a true in-depth interview lasts 1.5 to 2 hours, sometimes even extending beyond that and lasting up to 3 to 4 hours.

The direction of the search for information

The mentioned decrease in the number of interview participants (in the case of group interviews) and the longer duration of interviews are both the consequence of a clear change in the direction of the search for information in qualitative marketing research. This direction has changed from horizontal to vertical, meaning that focus group discussions are less based on questioning each respondent about a given topic, which produced general and rather superficial information, but more on getting to know each respondent in an in-depth way, understanding them in a wider context than just in connection with the use of the product (e.g., in the context of their values, needs, and lifestyle). As mentioned earlier, this has taken place alongside the evolution in the perspective from which the consumer is viewed, which has clearly shifted from a sociological to a psychological one.

Researchers have moved away from looking for concrete pieces of information and are more interested in gleaning in-depth contextual information. Hardly anyone today is interested in a "question and answer" type of qualitative interview where the consumer talks about the product being researched. Researchers are now after a wider range of information, the kind that would reveal the way the consumer sees a given product in the context of their life, values, and needs, as well as their own history regarding the category and brand, and this context would explain why the consumer uses or fails to use a given brand, why he or she makes certain consumer decisions, why they are loyal towards it or why they are constantly switching brands.

Diversity of methods and tools applied

Another clear and recent change with respect to qualitative marketing research is moving away from focus group discussions and towards other qualitative methods that could provide much better answers to the research questions (see Chapter 3 Table 3.2). Compared to 15–20 years ago, a significant increase of conducted individual depth interviews, dyads, and ethnographic-type interviews in respondents' homes is evident (ESOMAR, 2015). More proprietary research method solutions have also been developed in response to specific marketing questions.

The focus group facility where interviews are conducted has also undergone changes. First of all, it has gone through a makeover from focus group interview studios located in offices and decorated in conference room style to cosy rooms in residents' homes. Instead of office chairs around a formal conference table, comfortable armchairs are being introduced making focus studios more cosy and home-like. This change was driven by the desire to create a warmer and less formal interview setting that would

be conducive to making respondents feel more at ease and relaxed. Focus groups conducted in such surroundings more and more often resemble ordinary conversations between friends rather than official business meetings.

The next important metamorphosis involves qualitative research moving outside the studio setting and entering the homes of respondents (Hammersley & Atkinson, 2007; Mariampolski, 2006; Sunderland & Denny, 2007). This primarily concerns individual depth interviews, which are increasingly more often being held inside respondents' homes (in-home interviews or ethnographic research – see Chapter 3). The aim of this is not only to create a pleasant atmosphere, but also to observe the respondents in their natural environment. Getting to know them not only based on what they are saying about themselves (something that obviously has been more or less intentionally filtered) but also in terms of the objects they surround themselves with, which also tell a lot about the person. Seeing the respondent in his/her natural surroundings is an additional and important source of information. What respondents are saying about their values or preferences can take on completely different meanings when set in the context of their living environment.

It is worth noting that group interviews can also be conducted in the conditions of a particular respondent's home. A well-organised and well-equipped focus group studio can be particularly convenient when it has to be observed by clients. However, the importance and necessity of professional focus studios has, in some countries, become somewhat overrated. In most European countries, focus groups are held in studios arranged in an American office style with a designated room with a table and chairs in the middle. It is important to know that a less formal style linked more with the British focus group discussion tradition (Gordon & Langmaid, 1995) can also be adopted. In this approach, group interviews are conducted in more natural conditions (e.g., in private homes). These interviews are based on the assumption that the best place for obtaining honest and in-depth information is where respondents feel best and most at ease. In line with this approach, interviews with housewives, for instance, are held in a house in the neighbourhood, while interviews with businesspeople are conducted in offices or hotel rooms. The British experience shows that group interviews can be successfully conducted outside professional focus studios. Obviously, this style is less comfortable for the client to observe (possibly on television or computer screens or by simply being present in the room where the interview is being conducted) and offers less possibilities of control over unexpected disruptive factors (e.g., a neighbour dropping in). However, the natural setting of these interviews constitutes a definite advantage of observing the consumer in his/her natural surroundings.

Holding focus group discussions in such relatable conditions as respondents' homes does affect group processes. The atmosphere during such interviews resembles more of an informal chat at a neighbour's place than classic research. It facilitates the moderator establishing rapport with the group and the interview participants forging mutual ties and relationships with one another. It does require greater effort on the part of the moderator in successfully guiding the group as the natural setting and less relaxed atmosphere makes it very easy for the respondents to wander off the topic. The advantage of research inside respondent homes is, without a doubt, the chance to observe the respondents' natural surroundings and getting to know the consumer better: by seeing the homes where the researched products are being used, one sees the respondents in

Table 2.2 The evolution of qualitative research

	Before	*Now*
Number of group interview participants	Greater number of group interview participants (eight–ten)	Fewer group interview participants (six–seven)
Interview duration	Shorter: FGIs last approx. 1.5 hours, IDIs take approx. 1 hour	Longer: FGIs last 2–3 hours, IDIs take 1.5–2.5 hours
Number of interviews in research project	Greater number and more general and superficial discussion	Smaller number and more in-depth
	Shorter lasting but have more participants	Longer lasting but have fewer participants
Choice of method	Focus group discussions prevail	Increasing significance of mini-groups, dyads, IDIs, in-home interviews
Direction of information being sought	Horizontal ("skimming the surface")	Vertical ("penetrating and in-depth")
Types of information gleaned	Sociological – about the group	Psychological – about the individual
	Concrete – focused on researched product	Contextual – trying to understand broader context of product
Testing conditions	Formal – in a focus studios	Natural – in respondent homes
Projective and enabling techniques	Fewer techniques and more group tasks	More techniques and more individually conducted techniques instead of group ones, even in group discussion

their daily environment. Moderators accustomed to conducting interviews in standard focus studios may find in-home interviews much more challenging but most of all very rewarding. I remember one example where the research was carried out for an international gas producer in poor rural villages and small towns in Poland. During one of the interviews, when a participant asked for some more tea, it turned out that this was not possible because the host was so engrossed in the discussion that they forgot to add tinder to the stove and the fire had gone out. Such an experience made one much more aware of the conditions respondents lived in and provided a wealth of information about them, much more than could have ever be gleaned from an interview held in a professional focus group studio.

Another change within qualitative research is extensive use of projective and enabling techniques. Acceptance of the fact that the consumer has a whole sphere which is unconscious and that he or she is unable to express many things directly has resulted in projective and enabling techniques in qualitative research becoming much more important (see Chapter 4). Projective and enabling techniques can be conducted in group interviews by all the respondents together as teamwork, but can also be facilitated by the respondents individually. The same technique

(e.g., personification) performed individually usually offers a much broader and deeper understanding of individual respondents and of the researched problem than when conducted by all the respondents together as a group task.

Box 2.10

CASE 2.1 Why women in Poland didn't want to use hormonal replacement therapy to overcome strong menopausal syndromes

An international pharmaceutical company noticed that there were much lower hormonal medicine sales in the Polish market compared to other European countries. Medical analyses concerning the occurrence of strong menopause-related symptoms (ending with visits to the doctor) and data concerning prescriptions issued for these medicines revealed that the problem is neither less intense symptoms among Polish women nor failing to consult a physician but actually failing to buy the prescribed medicines. This diagnosis led the medicine manufacturer to conduct a series of focus groups with women going through the menopause who were experiencing strong symptoms and who saw their gynaecologist because of their acute symptoms and were prescribed hormone replacement therapy (HRT). One group of respondents (2 FGIs) was made up of women who bought the prescribed hormone medication and used them, whereas the other group comprised women who never fulfilled their prescription (2 FGIs).

The conducted focus group interviews showed that there are two main barriers for not using hormone replacement therapy (despite doctor's orders). The first, relatively obvious and openly admitted by the participants, was fear and apprehension towards hormones that their side effects are so great that they exceed potential benefits (the women taking the HRT did not have these fears). The second barrier was much less obvious, deeply rooted in culture and the women were, to a large extent, unaware of it – only to be coaxed out using enabling techniques ("The role of a woman" collage) allowing it to be understood. Many Polish women still perceive their role as a daily struggle, a sacrifice accompanied by a sense of pride in the fact that they go through life courageously (despite their many problems, worries, and pain) without giving up or asking for help. Moreover, they perceived their life as more living for others than living for themselves. These women treated the menopause as another challenge or even as a task where they simply have to bite the bullet and get on with it (just like the pain of childbirth), vowing not to give in and set on overcoming it without anyone else's help (e.g., medication). There were evidently clear differences in the way the women from the two groups perceived their roles. In the collage created by the group of women taking hormonal medication, there were much more photographs illustrating living life to the full, the joy of life, and striving to fulfil their dreams and passions and less of self-sacrifice, which was more prevalent in the second group.

These findings spurred the pharmaceutical firm to create and carry out an educational campaign concerning the menopause and shifting the communication about the very concept of hormone replacement therapy from "helping yourself"

to "thanks to this, your nearest and dearest are happier" (the better your personal comfort, well-being and quality of life, the more goodness is experienced by your milieu). This is how the motivation was directed away from self-centred (endocentric – on personal welfare) and towards others-centred (exocentric – tuned-in to the welfare of others).

Source: Maison&Partners

Box 2.11

CASE 2.2 Looking for insights into advertising communication: a campaign promoting road safety among young drivers

Based on 1998 Police data, one third of all road traffic accidents in Poland occur among the under-25's (both victims and perpetrators) and their most common causes are recklessness and alcohol. Hence, the need for a social campaign that would contribute to greater road safety in Poland by increasing awareness of the problem among young drivers and their passengers (often friends getting a lift home from parties). The first stage of the complex research project involved a qualitative study (4 FGIs) to identify the problem and look for insights into advertising communication. This was a study on young drivers (single, males under the age of 25), who regularly drove their cars, were convinced that they are very good drivers, but who would often seriously violate traffic rules (jumping the lights, crossing a double continuous centre line, double-overtaking). An analysis of the interviews outcomes revealed, first, that driving a car has a very symbolic and social meaning for them – it is less a means of getting around and more a way of boosting their self-esteem and building their position in a group while increasing their attractiveness to women (it should also be borne in mind that this was shortly after the political transformation in Poland before which cars were not a common good). Second, a key result – and definitely the most important from the point of view of the campaign being put together – was the discovery that the most horrifying consequence of a car accident for this group of people was not so much death (in relation to which they were often in denial or minimised), but disability (loss of attractiveness in their milieu, especially among women). These findings led to the decision to detract from communication referring to death, which was prevalent in social campaigns concerning road safety. In its place, an advertising campaign was created that touched on disability as a consequence of car accidents. The campaign billboards very sparingly in form showed images like a drip with the motto: "Your new drinks. After the accident." Another billboard had a wheelchair with the motto: "Your new set of wheels. After the accident." And a final one, showing a walking stick with the inscription: "Your new companion. After the accident."

Finding the new insight allowed the campaign to truly stand out and get noticed, so much so that the campaign effectiveness research conducted later

(continued)

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(quantitative study, nationwide representative sample) revealed that it was noticed by 38% of Poles. Furthermore, more drivers than non-drivers remembered the campaign, which shows that it successfully reached the right target group. The measure of the effectiveness of the campaign also included the perception of the causes of the accident. Before the campaign, 38% of persons under 25 years of age saw young people as the leading causes of car accidents, and this number went up to as many as 66% after the campaign.

Source: Maison&Partners and CitiboardMedia (Maison & Bruin, 2002)

Exercise 2.1

A manufacturer of modified milk for children (breast milk replacement feeding) wants to identify the barriers connected with the use of such milk by mothers of toddlers. Qualitative interviews were planned with mothers of small children (half of them are to use this replacement milk, the other half are not).

- Consider the possible barriers connected with mothers of toddlers failing to accept modified milk.
- Group the barriers into ones which could be fully conscious and easily verbalised by the respondents, as well as those which are less conscious and requiring the implementation of projective techniques in order to be diagnosed.
- Do you have any ideas as to what qualitative methods and techniques could be used to diagnose the mother's unconscious barriers towards the use of modified milk?

Exercise 2.2

The aim of qualitative research is to understand the barriers relating to the introduction of insect-based protein to food in order to create an advertising and information campaign aimed at overcoming the barriers to this kind of food. The client is planning to conduct six mini-groups with four respondents each.

- Consider the possible barriers connected with failing to accept insect-based food.
- Group them into barriers that are fully conscious and easily verbalised by the respondents, as well as those which are less conscious and requiring the implementation of projective techniques in order for them to be diagnosed.
- Do you have any ideas as to what qualitative methods and techniques could be used to diagnose the unconscious barriers towards food with insect-protein?

Note

1 All marketing research examples with no bibliographical reference cited in this book come from the author's own sources.

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3 Qualitative methods

The different tools in the hands of a marketing researcher

Classic qualitative marketing research methods: focus group interviews and individual in-depth interviews

Focus group interviews (FGIs), also called focus group discussions (FGDs), are the most commonly commissioned type of qualitative research in marketing (Belk, Fischer, & Kozinets, 2013; ESOMAR, 2016; Greenbaum, 1993). The greater number of group discussions compared to individual interviews in the marketing context is mainly down to fashion (being considered more spectacular) and convenience (shorter performance times, ease of interview observation by clients), not actual methodological premises. From methodological point of view both methods are essentially very similar and can often be used interchangeably. This doesn't mean that both methods are identical as certain differences do exist between them, thus, when deciding whether a group or individual interview is more suitable, we must be aware of the consequences of using each of these methods (see Table 3.1).

A focus group interview is a discussion between several people, usually about six to eight, led by an interviewer, called a moderator. The moderator's task is to guide (focus) the interview appropriately in order to find out as much as possible about the research subject (Cowley, 2000). This approach has four characteristic elements: (a) it is carried out in a group setting (several participants), (b) it is focused around (concentrates on) a specific topic, (c) the conversation is in-depth (not superficial), and (d) it is in the form of a discussion, not just a question and answer session. Its theoretical basis is two main fields of knowledge: (a) qualitative research methods (individual in-depth interviews, observations, and projective techniques), (b) social psychology – knowledge on small groups, their dynamics, and group processes (drawing from what is known about therapeutic groups, support groups, and interpersonal training).

Box 3.1

In qualitative research, we are moving away from the "question and answer" type interview towards contextual research. Such qualitative research is not limited to questions about consumption but is concerned with an in-depth understanding of the consumer by getting to know the various areas of their life. Their consumption is understood through the prism of this broad and in-depth understanding of consumers.

In turn, the individual in-depth interview (also called an IDI), is a conversation between two people (the interviewer and the respondent) with the purpose of getting to information which is the subject of research and wading deeper into it. These interviews have quite a free structure in the sense that it's more important to obtain specific information than it is to formulate questions or worry about the order in which they are posed. Such interviews require from the moderator not only special skills but also experience to conduct. In true in-depth interviews, the responses of the participants should be recorded[1] and not just taken down as only then can the interviewer truly focus on deepening the conversation instead of mechanically taking notes of responses to pre-defined question sets (in contrast to semi-structured interviews).

In marketing research practice, it is usually pragmatic arguments that help in deciding whether individual or group interviews should be conducted. If the study participants are meant to be relatively readily available and easily convinced into taking part in the study (e.g., beer drinkers, mobile phone users) then group interviews are usually opted for. If the study participants are expected to be hard to come by and enrol in the study

Table 3.1 A comparison of individual in-depth interviews and focus group interviews

	Individual in-depth interviews (IDIs)	*Focus group interviews (FGIs)*
Specificity		
Participants	Situation: 1:1 (one interviewer, one participant)	Situation: 1:7 (one interviewer, several participants)
Interview duration	Duration: 1.5 hours (often drawn out in time – lasting up to 2 to 3 hours)	Duration: around 2 hours (often longer – up to 2.5 to 3 hours)
Performance time	Less information in set time – longer performance	More information in shorter time – shorter performance
Volume of interview information	More information per participant (more in-depth information)	Less information per participant (less in-depth information)
Interaction between respondents	No discussion (contact, interaction) between study subjects	Discussion (interaction) between respondents, mutual stimulation of responses
Respondent impact on each other	No impact (only one respondent in one interview)	Possible influence of respondents on each other
Application		
Topic penetration	Greater need to deepen the problem and search for contextual information	Smaller need to deepen the problem
Perspective	Searching for information from a more psychological (individual) perspective	Searching for information from a more sociological (group) perspective
Confronting opinions	No need to confront opinions	Requires confronting of opinions
Reciprocal respondent impact	Concerns that other people's presence may block (inhibit) responses	Assumption that other people's presence may stimulate responses
Recruitment	Difficult recruitment (respondents are hard to reach)	Easy recruitment (respondents are easy to reach)

(e.g., experts, CEOs, exclusive car owners, consultants of rare specialties in medicine), individual interviews are usually chosen, as they are easier to execute.

Financial reasons are another purely pragmatic criterion to choose between individual and group interviews. Interestingly, financial factors may turn the scale in both directions: towards focus groups or individual interviews. In most research firms, the price of one group interview corresponds to three or four individual in-depth interviews. The easier the recruitment of participants is and the less in-depth treatment a given research problem requires, the more feasible it is to conduct group interviews instead of individual interviews, which involve greater labour costs (overhead expenses). On the other hand, if we only have a small qualitative research budget, enough to cover only one or two focus groups, it is much better to conduct six-eight individual interviews in their place (see Chapter 5). Although, looking at things globally, from the sample size perspective, we will come in contact with a much smaller group of respondents (6–8 persons instead of 14–16), however, a much deeper understanding of the problem will be gained. Furthermore we will have much greater control over repetition of the results in independent interviews, which is so important for qualitative research data reliability (see Chapter 8). If, on top of that, we are interested in different groups of people (e.g., users of our brand vs. users of competitive brands), it is much better for several individual interviews to be conducted for each kind of respondent than one focus group (mixing different kinds of respondents in one group interview is not at all a good strategy – see Chapter 5).

Another important criterion when deciding which approach to use (focus group interview or individual in-depth interview) is the awareness that the presence of other people may both facilitate and impede discussion. No matter what, one should never lose sight of the comfort of the respondents and the conditions that will make it easier for them to talk about certain topics. If the topic is very personal, sensitive, or threatening and we suspect that the participants will not be willing to discuss it freely and openly in other people's presence, individual interviews are better. However, increasing attention is being paid to the fact that group interviews – contrary to what was originally thought – are also suitable for studies concerning personal, sensitive, and threatening topics (Farquhar & Das, 1999). They may in fact sometimes be more fitting than individual interviews as the presence of others facing similar problems helps in coping with one's own problems and openly talking about it. The awareness that other people have gone through similar things, share comparable experiences and opinions for many people instils courage and self-confidence enhancing opening up. The answer to the question of when to conduct a group interview and when an individual interview is clearly not obvious, hence, every situation requires careful thought and consideration on the part of the investigator.

Box 3.2

Increasingly more attention is being paid to the fact that group interviews – contrary to what was thought about them originally – are an excellent setting for conducting research into sensitive, intimate, or threatening topics. Sometimes other people's presence actually helps us to reveal our own problems. The awareness that others have gone through similar experiences, have like opinions and experiences is, for many, a factor that helps them open up.

Apart from the pragmatic considerations mentioned above, the decision as to which interview – group or individual – is more suitable should result, in the first place, from substantive reasons, namely, the research objective. When the study aims to understand the complicated psychological mechanisms underlying brand acceptance or rejection and we also suspect that some of these mechanisms may be unconscious, we should definitely use individual in-depth interviews (or dyads). If we are pursuing a global understanding of a topic we know little about or if we are after an exchange of opinions between equals, group interviews may be of more relevance.

It is worthwhile to remember that when planning qualitative marketing research, we don't always have to choose between individual or group interviews alone (Desai, 2002). There are certain, more complex marketing issues where both individual and group interviews are justified (e.g., because of the need for information from different – some more and some less accessible – respondents or prospecting different kinds of information). In such situation mixing both methods in one research project is recommended (e.g., using four focus groups and ten individual interviews).

Despite the domination of focus group interviews and individual in-depth interviews among qualitative marketing research methods, when planning a methodology for the study it is worth considering whether some other, less conventional and seldom employed method isn't more appropriate to resolve a given issue and will not provide more valuable marketing information.

Dyads: a trade-off between individual in-depth interviews and focus group interviews

Dyads – interviews conducted concurrently with a pair of respondents – require a separate discussion altogether. Dyads are a very interesting combination of the advantages of group and individual interviews, giving the possibility of entering comparably deeper into the topic, as in the case of group interviews, allowing respondent opinions to be confronted. Dyads are not a commonly used qualitative research method, but sometimes they are very useful and irreplaceable. Their potential is underestimated by clients and researchers who usually choose far better-known alternatives: individual in-depth interviews or focus group interviews (Greenbaum, 1993).

The changes in thinking about qualitative research as a source of in-depth and contextual consumer knowledge (not only concerned with product usage but with broader context of consumer life) have contributed to the growing popularity of dyads. In group interviews, it is impossible for one respondent to interruptedly talk about his/her history of use of relevant brands from the studied category for ten minutes nonstop, for example, because the rest of the participants would completely lose interest during this time, and if everybody wanted to talk about their experiences in such a lengthy manner, the whole discussion would have to end at the second question. The situation is completely different in the case of a dyad. One person is very capable of listening – often even with interest – to the other respondent's several-minute monologue and patiently waits their turn. Dyads consisting of participants with similar experiences (e.g., using the same brand, having the same lifestyle, or being at similar life stage) are called homogenous dyads.

Box 3.3

A dyad is a compromise between an individual interview and a group one, taking everything good from each one. It allows a topic to be penetrated in a similar way as in an individual in-depth interview while also giving the opportunity to confront the opinions of the interview participant, which is the strength of a group interview.

The above substantive considerations of deepening the topic warrant the performance of dyads instead of focus groups. Dyads are also preferable to the use of individual interviews when the opinions of respondents with different experiences require confrontation (e.g., user of brand A and B) and for various pragmatic reasons. First, dyads are logistically more manageable: compared to individual interviews, there is contact with a greater number of respondents over a set period (e.g., 12 people in the case of 6 interviews), ensuring greater reliability of results (cf. Chapter 8). Second, dyads, compared to individual interviews, are also easier to observe by the client what with them being less monotonous than individual interviews, with more things going on during their course, enabling interactions between respondents, with more diverse statements, opinions, and experiences. Third, dyads are more time and cost effective than individual interviews (Greenbaum, 1993)

If the objective is to identify differences in attitudes and confront divergent views and experiences (e.g., iPhone vs. Samsung users or Mercedes vs. BMW owners), confrontational dyads can be conducted, which work much better than ordinary group interviews in these circumstances. Group processes usually lead to the averaging of differing opinions (cf. later in Chapter 3 – Confrontational groups). What's more, it is difficult to separate the statements of relevant respondents on the level of a group interview analysis, which gives rise to inconsistencies in results rather than an in-depth understanding of the issue. In a dyad, however, the interviewer has greater control over the opinions voiced by each respondent belonging to a different group (e.g., user of brand A or B).

Traditionally dyads are treated as a type of interview that is justified in two cases: (1) when the topic concerns two persons simultaneously, for instance, a married couple, where an interview with one person will not give a full understanding of the situation (e.g., joint decision concerning buying of an apartment or going on holiday together); (2) when we want to confront different opinions, like users of two directly competitive product brands, or give the means to express two clearly contrasting attitudes (national vs. foreign cosmetics brand advocates, or German vs. Japanese car enthusiasts, etc.) – referred to as confrontational dyads. Dyads are currently used in all research settings when an in-depth approach accompanied by respondent interaction is required.

Shorter, longer, differently: variations around focus groups

The two qualitative methods (individual and group interviews) described above are not just the most commonly used qualitative research methods in marketing but,

according to some authors, practically speaking the only two qualitative approaches (Gordon & Langmaid, 1995). They are quite right, particularly considering the evolution that has occurred in qualitative research. Thus, the approach that twenty or so years ago was considered a different method (e.g., mini-groups) altogether has now become the standard (standard focus group interviews are now conducted with less participants than in the past). Nevertheless, since descriptions of other methods with different names can be encountered in literature and in practice, a brief outline will be presented below. Let's start from variants of group interviews which, failing to meet certain classical conditions of focus group interviews (e.g., duration, number of respondents, participant selection rules), have been given their own names and are sometimes considered to be separate methods. They include, among others, the mini-group, extended group, reconvent group, affinity group, the concept lab, confrontational group, and creativity group (see Table 3.2).

Box 3.4

In qualitative research – contrary to quantitative studies – less means better. The less groups, the less respondents, the less issues discussed during an interview – the better the depth of research outcomes. Only in this way can we grasp from qualitative research what is truly valid and important.

The mini-group

The first variant of a focus group interview is the mini-group, in other words, a focus group interview conducted with a smaller number of participants (four–five persons). Having said that, we must recognise that in the context of the systematic reduction of the number of group interview respondents, groups treated in the 1990s as mini-groups are now coming close to being classified as an ordinary focus group standard (e.g., Greenbaum, 1993 defines focus group interviews as a group with eight–ten participants, whereas a mini-group is with four–six participants). The advantage of the smaller discussion group is that it allows a deeper penetration of the topic to be achieved than would be possible in classical group interviews (especially as big as were conducted in the past). An interview in a small group gives all the participants the chance to take more active part in the discussion. Compared to larger groups, this allows more topics to be discussed in depth. Also, thanks to the more intimate atmosphere that can be created compared to a seven–nine person group, it is conducive to discussing more difficult topics or ones requiring respondents to become familiarised with more challenging or complex information (e.g., regarding some research materials). Groups where a smaller number of participants are recommended are interviews where participants require an increased amount of individual attention from the moderator (Eriksson & Kovalainen, 2015) or with professionals who have much to say about the investigated subject (Greenbaum, 1993). An example of such demanding respondents include groups of children (of preschool and early school age) due to the specific stage of development or medical specialists due to broad professional knowledge.

Below are some examples of situations where interviews with a smaller number of participants are justified (Morgan & Scannel, 1998):

- A very emotional and involving subject – this requires giving each respondent the opportunity to vent their views, which is only possible in smaller groups.
- The participants are experts in their fields – they have a lot to say about a given topic and the statements of each participant are lengthy.
- The topic is controversial – it is easier to notice the verbal and non-verbal inconsistencies in statements made by respondents, making managing the group more straightforward whenever a conflict should arise.
- It concerns a complex and complicated subject and the aim is to obtain in-depth information from given participants – each group member requires more attention from the moderator.
- Complicated respondent recruitment criteria – it is difficult to get a larger group together at the given time.

Extended group

Another modification of the traditional focus group is the extended group, the distinctive feature of which is its duration (from 3 to 4 hours). Depending on the requirements, interviews can be conducted with a larger or smaller group of participants, for instance, in the form of a mini-group. Here, we can also see how the distinction between extended and traditional groups is becoming blurred because of the larger amount of time that standard focus groups take. In groups lasting 3 or more hours, the comfort of the respondents also has to be considered, which is why such interviews usually include a tea or coffee break with snacks. It is very important to introduce many tasks for participants in extended groups, often including projective and other supporting techniques that make the session livelier and less tedious for the participants (cf. Chapter 4).

The increasing duration of interviews is a natural consequence of the contemporary contextual approach to qualitative research mentioned earlier as this is the only way that the moderator can, aside from the conversation about the primary research object (product, packaging, or advertising), also expand other areas less-directly linked to the research objective (needs, values, experiences with other products), however, very important to understand consumer processes.

Extended groups are usually applied in the following cases:

- When searching for contextual information to help gain a deeper understanding of the respondents not just in the context of the used product, which explains the longer discussion time needed for all the topics.
- The topic is very broad with many issues requiring lengthy discussion.
- The topic is difficult, threatening, or personal, requiring more time to be devoted at the beginning in order to build trust and rapport with the group (e.g., in a study concerning personal experiences connected with divorce and the ways of coping with the situation).

Box 3.5

The qualitative marketing research has moved from the horizontal to vertical search for information. The researcher is less interested in the opinions of the majority of participants on a given issue and more in how the opinions of an individual respondent relate to their experiences, views, values, and lifestyle.

The reconvent group

Another variation of the group interview is the reconvent group (Gordon & Langmaid, 1995). These are focus group interviews with the same participants which, after some time, are repeated two or more times. This method is used when the study concerns a change in opinions resulting from new experiences gained as well as a change in attitudes. One example is research concerning a newly released movie series. The first interview will study respondent experiences, opinions, and attitudes about the existing movie series, after which they will then be tasked with watching one or two episodes of the new series at home. The second interview will involve investigating the opinions of the same respondents about the series watched by them. In addition, the second interview could also encompass an assessment of any promotional and advertising materials of the studied product.

These types of interview are also a response to the changes taking place in consumer perception as well as the awareness that anchoring opinions in experiences is of much greater value than opinions not backed by experience. Such studies allow conversations to develop around a longer – hence, closer to authentic situations – product experience (see also Box 3.9, Case 3.2).

Affinity groups

Another modification of focus groups are affinity groups, which are usually formed by selecting respondents based on their work or school friendships. This gives them a greater sense of security in discussing topics that are normally reserved for close friends and not random persons.

The concept lab

Sometimes (especially in the context of studies on advertising concepts) a dynamic form of a group interview may be encountered, which is referred to as a concept lab. In this method, the interview guide is changed from group to group and the choice of specific problems to discuss as well as the time devoted to relevant issues is adjusted as required to the information obtained from the previous group. These studies are usually conducted in the form of one- or two-day sessions during which a series of group discussions are held (usually three–six groups). There are longer breaks between relevant groups compared to classical research (usually lasting 2–3 hours). These breaks are for summarising the results of each group and modifying the study course based on

emerging information: the scenario and the tested materials (e.g., changing the content of a positioning concept). What makes this method unique is the substantial involvement of the commissioning party: client, researcher, and advertising agency team who observe the course of the interviews and work together on the implementation of further modifications (Box 3.7).

Theoretically, classical reports from these studies do not have to be written up and top-lines, stating the conclusions reached after two-day workshop research work, are entirely sufficient, without having to describe exactly what happened in each subsequent step of the process. In practice, however, reports are commonly written up as documentation from the conducted studies, which are later used as the basis for settlements with the research agency.

In this method, however, debriefing, where the results are analysed and summarised progressively, is more important. This is why this approach requires a highly experienced moderator and qualitative investigator who can scrutinise the information obtained and recommend the implementation of changes and modifications at successive stages of research. Under ideal conditions, the concept lab should be conducted by two experienced researchers, one of whom is charged with moderating groups and the other with the analysis and intense cooperation with the client throughout the research process.

Box 3.6

Example of issues investigated in concept-lab research

Research: five focus groups, each lasting 2 hours; project execution lasting two days.

Aim: selecting the best positioning for a new petrol station concern.

DAY 1

Group 1 (11:00 a.m. – 1:00 p.m.)

– Customs connected with the use of petrol stations, station selection criteria (in-depth exploration)

Interval between the groups: summary of results

Group 2 (2:30 p.m. – 4:00 p.m.)

– Customs connected with the use of petrol stations, station selection criteria (less in-depth exploration)
– Assessment of six positioning proposals (briefly explored)

Interval between the groups: selecting, if possible, three of the most interesting positioning concepts from six tested

Group 3 (6:30 p.m. – 7:30 p.m.)

- Customs connected with the use of petrol stations, station selection criteria (only as a warm-up)
- Testing of three positioning proposals (in-depth exploration)

Interval between the groups: summary of results

DAY 2

Group 4 (12:00 p.m. – 1:30 p.m.)

- Customs connected with the use of petrol stations (only as a warm-up)
- Testing of three positioning proposals (in-depth exploration, projective techniques can be introduced to obtain deeper and more affective reception of positioning concepts)

Interval between the groups: rejection of one positioning, if possible

Group 5 (4:00 p.m. – 5:30 p.m.)

- Customs connected with the use of petrol stations (only as a warm-up)
- Assessment of two positioning proposals (deepening of the differences between them, the strengths and weaknesses of each of the investigated positioning concepts – projective techniques can be introduced)
- Presentation of several advertisements of different petrol stations (aim – check which advertising style fits the selected positioning concept)

Debriefing: executive summary. Summing up the advantages and disadvantages (strengths and weaknesses) of the last two positioning concepts (possibly choosing between them)

Interactive methods: confrontational and creativity groups

The confrontational group

This method allows for the study of differing opinions and behaviours of various competitive brand users (usually two–three), also including direct confrontation of those opinions and experiences. To reach this objective, we cannot resort to conducting traditional focus groups with representatives of different options (different brand users, proponents of different views), as then, instead of a confrontation, we will probably obtain averaging opinions. In a normal focus group, respondents don't usually defend their consumer habits and perceptions as they can see or suspect that the remaining interview participants have different opinions. On the contrary, they are eager to hear about rival goods' user experiences, naturally leading to the weakening of their own

opinions and, consequently, the diverging opinions presented within the group become less and less distinctive and diverse.

If we are after a sharpening of opinions that capture specific differences, it is much better to hold a confrontational group. In order to do so, conditions conducive to enhancing a confrontation of opinions must be ensured, referred to as the minimal group paradigm (Tajfel, 1982). In studies on the minimal group paradigm, people were divided into groups based on a set of simple criteria like, for instance, the colour of a randomly allocated pen, which proved sufficient for in-group identification to appear and, consequently, positive feelings and actions towards its representatives and negatives ones towards the out-group. This mechanism is only triggered by those members clearly feeling a sense of connection and belonging to the group. If we want to achieve this effect in a confrontational group (i.e., for sharper views to be obtained), competitive brand users can be seated on opposite sides of the table or in different parts of the room. Every respondent's sense of belonging to each group should additionally be accentuated by an appropriately coloured scarf, a badge with the brand used by them, or a cap with the logo. Failing this, a frank confrontation of opinions is virtually impossible.

When attempting to confront different types of respondents within one group, one must be very careful about the issues to be confronted so as to ensure that the confrontation is stimulating and not blocking respondents, and for it not to be a confrontation of the obvious. This is why users of products from clearly different segments should not be confronted: for example, very cheap products purchased because of their low price (economy products) vs. expensive products bought because of their higher quality (premium products). In such a setting, those buying because of the low price may feel insecure and fail to disclose their real views, and financial considerations may dominate the entire conversation. In the meantime, confrontational groups are justified in the case of heavy users of brands from a similar price range, like Coke and Pepsi, French vs. German car enthusiasts, supporters of two competitive parties or vegetarians vs. omnivores.

The success of the confrontational group as a research method is highly dependent on the area of interest, primarily the level of involvement of the respondents in the studied category or brand used. If they are indifferent to the category or the brands are not very engaging, the chances of the respondents committing to "fight" for their brand are small. However, if the problem concerns an engaging category where really emotionally connected brand users clearly compete with each other, this approach stands a chance of being successful and can provide much more interesting information than an ordinary focus group. This is why we have a chance of getting an interesting confrontation when putting supporters of opposing political parties or users of two strong, clearly competing brands together.

The creativity group

Another completely different variation of qualitative marketing research is creativity groups. We have to be clear that this is a completely different method from focus groups, which is why it is not enough to be a focus group moderator in order to successfully facilitate them but requires skills closer to conducting creativity trainings (which some moderators may, of course, have mastered) accompanied by knowledge of creative process stimulation. In creativity groups, the focus is not so much on

obtaining opinions about certain topics but more on stimulating the group to work together in order to unleash new solutions and ideas. A plethora of creativity-stimulating techniques and creative problem solving like brainstorming, for instance, are introduced in such groups, which are based on the principle of deferred judgement and refraining from criticism on the concept or idea development phase. The scope of creative work in such a group is centred around marketing issues like searching for new product solutions for insurance companies, working on new protein sources for food products, and development of new mobile phone innovations.

Creativity groups usually last longer than standard group interviews: 3–4 hours most often, but it is even better if they take even longer, up to 6–8 hours, and take the form of workshops rather than interviews. The long duration of such groups results from the number and complexity of the tasks set as well as the rules governing creative thinking. One of them is that, in the initial phase of the process, ideas which are a reproduction of what is already familiar and have little to do with creativity are generated. This is why this method requires an experienced facilitator who has mastered creativity cultivating techniques apart from already being skilled in focus group moderation.

Creativity groups are usually composed of more persons than standard focus groups (e.g., 10–12 participants) and most of the tasks are carried out in smaller sub-groups. The selection of creativity group participants is also different from traditional focus groups (Desai, 2002). In focus groups, the point usually is for the participants to be as typical as possible representatives of a given group, whereas for creativity groups, non-standard people are sought who think outside the box and have an above-standard level of creativity (tested before being invited to take part in the study). This is also the reason why persons who are assumed to be more creative than average because of their professions like artists or those with creative occupations, for instance, are usually invited to such studies.

Some clients looking for creative solutions have been known to put pressure on the marketing research agency to generate new concepts and ideas (e.g., the name, packaging design, communication, or an ideal product) in typical focus groups with "ordinary people" as participants. This is not, by any means, a good idea as the outcomes of such attempts have little in common with a creative solution (Desai, 2002). This is primarily because ordinary studies usually trigger a different kind of thinking than creative ones and are associated with functions localised in the other cerebral hemisphere. Traditional marketing research activates convergent thinking, which is typical of reporting facts, assessments, and preferences and is related to analytical thinking. Creativity, however, is divergent – non-judgemental, non-analytical and goes beyond the obvious (An, Song, & Carr, 2016; Forthmann *et al*., 2016; Forthmann *et al*., 2017; Yi, Plucker, & Guo, 2015). Second, "ordinary" people usually find it very difficult to go beyond what they are already familiar with and used to, and what they have already experienced to date. This does not mean that "ordinary consumers" cannot be the source of new ideas; on the contrary, new product ideas, their improvements, and new ways of using them do come from focus groups too. However, "coming up with ideas" is seldom (and shouldn't be) the objective of the typical focus group and new concepts and ideas usually arise while other issues are investigated. I personally advise against traditional focus groups when the objective is generating new product ideas, names, or advertising campaigns. Qualitative research is very suitable for the evaluation of the concepts and ideas created by a company (producer, advertising agency, or graphic design studio), but does not actually stimulate creativity.

Table 3.2 Diversity in focus groups

Method	*Difference compared to classical focus groups*
Mini-group	Fewer respondents in group (four–five persons)
Extended group	Longer interview duration (3–4 hours)
Reconvent group	Repeated meetings (interviews) with the same group of respondents
Affinity group	Group interviews where, by definition, respondents know each other (all of them or friendship pairs)
Concept lab	A series of focus groups where, by definition, the area of information sought and the studied material (concepts) change from group to group
Confrontational groups	Setting up a group interview to stimulate different opinions from various groups (for example, users of two competitive brands) and allow the different opinions to be confronted
Creativity groups	A group of carefully selected persons tasked with creative work and the development of something (e.g., a new product). Special techniques fostering creativity and supporting divergent thinking must be employed in this group

Closer to the real experience: ethnographic research and observation in the marketing research context

The original meaning of "ethnographic research" is related to the study of cultures and societies common in anthropology, where the investigator spends a long time sharing his/her life with the societies being researched by them. And so, for instance, the world-famous Polish anthropologist Bronisław Malinowski, who was living at the turn of the 19th and 20th centuries, spent a large portion of his life in Melanesia, where he tried to gain valuable insights into the culture and society of Trobriand Islanders (Malinowski, 1922/1961). According to him, the objective of an anthropologist and researcher is to see the world through the eyes of the natives, learning about their typical mind-sets and sensitivities, and establishing what are the norms, conventions, and general rules in the investigated community.

In recent years, increasing attention has been paid to harnessing ethnographic methods in marketing research and more research of this kind is being conducted (Bradford & Sherry, 2013; Elliott & Jankel-Elliott, 2003; Mariampolski, 2006). This is hardly surprising as the method excellently lends itself to understanding exactly who the product user is, to experiencing his/her world, learning about his/her values, needs, lifestyle, and to exploring all the issues related to product use, various household activities, and skill acquisition (Arnould & Wallendorf, 1994; Belk *et al*., 2013; Eriksson & Kovalainen, 2015; Mariampolski, 2006; Myers, 1999, 2013).

A characteristic feature of ethnographic research is its focus on exploring phenomena, which requires great openness on the part of the researcher towards a completely different reality and a unique skill set to discover the things that were not defined on the research planning phase (Desai, 2002; Hammersley & Atkinson, 2007). Another distinctive feature of such research is its methodological and organisational flexibility – becoming more of a research strategy than a standard method (Atkinson, Coffey, Delamont, Lofland, & Lofland, 2007). The third and perhaps the most striking feature is the research location, namely, the respondent's natural environment. In focus groups, the respondent can be observed in just one of his/

her roles directly resulting from the research subject: the user of a given brand or product (Desai, 2002). During the interview, the respondent can, for example, be for us a consumer of a relevant fruit juice brand with their other life roles practically being left unseen (e.g., the fact that the respondent is a teacher, a French film enthusiast, or that cycling is one of their pastimes). In ethnographic research, a person reveals (or should reveal) themselves to the investigator in more than one role, context, and plane (Walsh, 1998). The fact that they use a given product is also manifest in a specific context and not in isolation (Abrams, 2000). In studies based on interviews alone, the words used by the respondent may have different meanings for him/her than they do for the investigator (Boote & Mathews, 1999). This is why an interview conducted in the natural environment of the respondent/consumer gives an additional dimension to the knowledge gained. In ethnographic research, an investigator – apart from observing and talking to the respondent – also collects a great deal of visual materials in the form of photographs and video recordings, which are later analysed (Pink, 2005; Sunderland & Denny, 2007) (see Box 3.8, Case 3.1).

Box 3.7

Qualitative marketing research is becoming an ever-greater part of consumer's lives. Researchers enter into consumer's homes to see them in their natural environment. Getting to know them not only from the perspective of what consumers are saying about themselves but also what the objects surrounding them are saying about them.

In a study on margarine commissioned by a Western producer specialising in the manufacturing of food fats in the 1990s in Poland, the discoveries of greatest interest to the company were made during the ethnographic part. In a focus group regarding frying, the respondents started from explaining how they put the fat on a heated up frying pan but they left out the earlier stages, which they considered not to be directly related to frying. It was only during ethnographic interviews conducted at their homes when the respondents were meant to fry meat in front of the investigator that it turned out that their first action involved covering their kitchen worktops with old newspapers. This was a habit that was formed during the crisis period in Poland when margarines spattered when fried because of their water content. This discovery led to the manufacturer positioning its margarine as "non-splatter margarine". This advantage, useless in Western countries, was highly justified in the Polish reality and, at the time, strengthened the brand's competitive advantage.

Another example of using ethnographic data collection methods is the study for the international media group, Edipresse. The aim of the research was to profile the readers of a cheap lifestyle advice magazine in order to gain an insight into what their lives look like and adjust the advice in the magazine to best suit their needs. In earlier focus groups conducted with its readers, statements like "I wear activewear", "I make healthy meals", and "I like modern home interior design" could be heard. However, behind the doors of their homes, a completely different picture could be found. Their wardrobes mainly contained sequined, frilly blouses bought from local

market stalls ("activewear"), they always served traditional food like fried meat and potatoes (which in their language meant "healthy meals"), and all the homes contained old-fashioned wall units, two armchairs, and a small table ("modern interior design"). These "discoveries" allowed the advice in the magazine to be tailored to the group of readers, which very quickly increased their sales.

A good example of a very productive use of ethnographic research was searching for deeper values differentiating the segments identified earlier in a quantitative study that was conducted. These segments were regarded as the main target groups and, because they were quite similar in demographic terms, the study was to provide enhanced knowledge showing their differentiation (which wasn't evident from the quantitative study outcomes). Despite the representatives of both investigated segments stating that their family is important to them (the same percentage of persons in both segments declared that their family is of utmost importance), it was only a stay in their homes that revealed the fundamental differences between them. Even the furniture in the homes of those whose family truly was of great value to them was conducive to spending time together. Family members would often sit down together, eat meals together, watch television together, and spent a lot of time talking with each other. The homes where more individualistic values dominated, the interior arrangement also did not encourage interaction between members of the household: each room had a separate television, there was no room for shared meals, and each household member spent most of their time alone in their own rooms. There often was no room in the home where all the family members could meet and spend time together. The results of this study prompted the company commissioning the research to develop separate marketing communication adjusted to each of the identified segments, addressing different (individualistic vs. collectivistic) values (see also Chapter 7, Box 7.17, Case 7.2).

Finally, it is worth emphasising that what is termed as ethnographic research has numerous variants (Deegan, 2007; Desai, 2002), starting from a brief visit to the home of the respondent (which should not, in actual fact, be referred to as ethnography but rather in-home interview), to the most advanced "walking a mile in the consumer's shoes" by spending a good few hours in their home, combined with an in-depth interview, observation, and having the respondent perform various different activities in the investigator's presence (depending on the research objective, this may involve doing the washing, cooking, cleaning, minding children, or having a drink in the evening). In the most extreme cases, this may even comprise the researcher living in the respondent's home for several days at a time, accompanying them in practically all day-to-day activities, closely following, documenting, and analysing every move.

One must admit that typical ethnographic studies in marketing research are not carried out that often. Unfortunately, this research is difficult logistically, time consuming, and expensive, whilst the marketing reality frequently demands the rapid provision of information. For this reason, studies carried out in the respondent's homes are much more common and – if supplemented by elements of observation or taking snapshots of their living environment – should rather be referred to as "in-home in-depth interviews" or "in-depth interviews with ethnographic elements".

Observation

Many textbooks on marketing research, aside from individual and group interviews, mention observation. Observation is, undoubtedly, a very useful tool and an individual

and group interview data-enriching source (Boote & Mathews, 1999). If, however, we were to analyse type of qualitative researches conducted by a marketing research agency, it turns out that observation, as an autonomous qualitative marketing research method, appears very rarely; in fact, is rarely commissioned and accounts for only a small percentage of the research company's turnover (ESOMAR, 2016).

In marketing research, however, observation is a fundamental tool used in other qualitative methods, especially ethnographic studies (Desai, 2002). It is an auxiliary but crucial source of information about the respondent. Exactly how a respondent's home has been furnished not only shows how well off they are but, to a large extent, reflects the relationships between the members of the household (see earlier example). The objects a person surrounds themselves with tell us what is important to them and what priorities and values they hold dear (Epp & Price, 2010). Observation can also be a very inspiring source of knowledge about the purchasing decision-making processes. Observation of a person doing their shopping can reveal a lot about how this process works, with regard to the involuntary reactions escaping a person's conscious control (e.g., what was looked at for a longer period of time, which places the person stopped at and which were bypassed). The observation examples mentioned here are not, however, autonomous research methods and gaining a good understanding of the information provided by them requires knowledge to be supplemented by an interview with the respondent.

An area where observation is a highly useful method is consumer buying behaviour research, for instance, in which order given store departments are visited by customers, where customers stop or don't stop, where they spend most of their time, whether or not they view and handle the goods, if they know what to put in their basket straight away, and what they look at and read on the product labels (so-called shop-along research) (Rust, 1993; Underhill, 2009). In such a case, the observation provides more information than an interview because moving around the store is, largely, an automated action and not many people are capable of exactly reconstructing their shopping experience once it is over. Depending on the research goal, the observation is either enhanced by an interview or not. If we want to gain a thorough understanding of what is going on in the heads of consumers, observation alone hardly ever suffices but has to be additionally augmented by an interview where the respondent explains his/her behaviour to the investigator (Stafford & Stafford, 1993). If, however, we are more interested in finding the answer to the question of who visits the store, at what time, how they make their purchases, the manner of their movements in the store, which places are most and least frequented, an observation of the store alone and of its clients is enough and does not need to be backed by an interview (Underhill, 2009).

One example of studies deploying observation as a source of obtaining information is usability testing (used to evaluate a product) led by various service firms (so-called usability testing). Microsoft, for instance, employs an entire team of psychologists tasked with studying potential users by tracking the software used by them. They draw their conclusions about their line of thinking based on these outcomes and then determine at which point ambiguities appear in the software, what users find the most difficult, and what requires improvement. All of this is harnessed to release software that has already been tried and tested to ensure a good user experience.

Another example of using observation to recondition a product is a study carried out by a software producer who wanted to find out how not very computer savvy users are managing (or not) with the software installation process, what kind of emotions

Table 3.3 Substantive and functional rationale for the selection of a research method

Method	*Selection rationale*	
	Substantive (resulting from marketing questions)	*Functional (pragmatic)*
Focus group interviews	• Searching for general information (e.g., researching habits) • Topics concerning opinions (e.g., about public transport) • Topics requiring discussion (e.g., social problems)	• Short study implementation time
Mini-groups	• Searching for more in-depth information • Deeper understanding of each respondent not required	• Respondents difficult to recruit • Respondents providing many information (e.g., experts) • Respondents difficult to control (e.g., children)
Individual in-depth interviews	• Looking for really in-depth information • Need to reach subconscious areas (e.g., needs, motives, values) • Investigating barriers associated with brand non-use/rejection (subconscious areas requiring the use of individual projective techniques)	• Territorially dispersed respondents • Specialists and experts – persons who can provide a wealth of information • Need to investigate individual experiences
Dyads	• Similar premises as individual in-depth interviews • Additionally gives the opportunity to confront opinions (e.g., when examining brand loyalty)	• Shorter study execution time • Large respondent sample size (compared to IDIs) performed in the same study implementation time (principle of repeatability) • Easier than IDIs for the respondent • Easier than IDIs for the observer (more lively, dynamic)
Interviews in a respondent's home	• Need to understand the respondent as a person (and not as a consumer); looking for a broader context for market knowledge (directly relating to product use) • The need to confront declarations with reality (observation) • More natural testing conditions	• Useful in places where there are no focus group facilities • Easier to reach persons from small towns and villages
Observation	• Understanding behaviour (e.g., tracking the purchasing process) • Understanding product use problems	• When wanting to examine respondent behaviour without them being aware of being studied

this process invokes, what they do when they can't handle things, and at what moment they surrender and give up on the installation (Abrams, 2009). The respondents were meant to instal the software on a brand-new computer. All the investigator did was observe the whole process without asking any questions or giving any prompts. This observation allowed the researchers to not only understand what creates the software

installation difficulties but also the emotions accompanying them, enabling them to check what steps – often ineffective – are taken by the respondents.

Such observational studies sometimes require the investigators to have enormous mental strength as they often expose the respondent to great stress without which it would be impossible to understand the whole process. In a study commissioned by a producer of devices for people with hearing difficulties, elderly people were asked to independently replace the battery in the device (which they usually asked someone from their family to do). However, the observation of the problems they encountered when trying to replace the batteries, their immense stress and frustration, did produce results because they managed to find a solution (a minor change in the battery design) that greatly facilitated the independent battery replacement process (Abrams, 2009).

Observation as a part of qualitative marketing research is also recommended in the context of studies involving young children (of preschool age). With young children, due to their low verbal competence resulting from their developmental stage specificity, more information can often be obtained by observing their behaviour than by asking them questions (Stanley, 2001).

Exploring new technologies: qualitative online research

Another very interesting and increasingly dynamically developing area of qualitative research is online research (Heinze, Freneley, & Child, 2013; Lee & Bradlow, 2011). Interest in online qualitative research began to develop in the 1980s when computers became commonplace. Back then, the main focus was put on attempting to recreate the focus group research philosophy over the internet (Desai, 2002). First, these were real-time studies involving several respondents at one time in a moderated session. The moderator had contact with the respondents over the internet allowing for interaction not just between the moderators and each respondent individually but also between all the respondents taking part in the study. The participants discussed different tasks during such a virtual meeting (e.g., making a collage together).

Despite the fact that online focus groups in the form described above seemed to be a very promising approach, they did not actually catch on and still represent a minimal part of qualitative research as well as online qualitative studies (Cunliffe & Karunnayake, 2013; ESOMAR, 2016). However, nowadays other forms of online qualitative research have become popular and have met with much greater success, for example bulletin boards. This method involves the selection of a group of panellists (ranging from around ten to several dozen) who perform tasks for a specified period of time (e.g., two weeks). The role of the moderator is to delegate tasks to the respondents and provide the assistance necessary to perform them. What makes this method different from the previously described online focus groups is that the study participants carry out the set tasks at their convenience (Harris, 1997). For example, a moderator may delegate a task or pose a question to the respondents for a given day. They can then check on their progress several times throughout the day, give them feedback, ask further questions, and clarify things. This method is more like online discussion forums than the initial online focus groups (Miller & Walkowski, 2004).

Sometimes the term market research online communities (MROCs) is used alongside bulletin boards. The difference between these two methods is not very clear, however, MROCs are generally considered to last much longer (even up to several months), and usually have a greater sample size than bulletin boards. The issue of

online qualitative research seems to be left open and a lot depends on the researcher's intentions. The pervasiveness of the internet and the freedom of its use suggests that it is this research stream that will continue to evolve over the coming years (Miller & Walkowski, 2004).

Although in the past marketing researchers began to think about online qualitative research when they attempted to directly transfer the focus group method while trying to retain most of its definitional features, at the moment, they are rather trying to harness the specificity of the internet as a medium for qualitative data collection, and not necessarily to replicate traditional methodologies but to search for new solutions (Desai, 2002; Miller & Walkowski, 2004; Verhaeghe, Van Neck, Tomoiaga, & Plazo, 2017). This is why the popularity of the bulletin board method continues to grow. New research methods have arisen and will undoubtedly continue to arise, harnessing the specificities of the internet to gain superior knowledge about consumers. For example, at present, we observe growing interest in online consumer studies combined with qualitative algorithm software used in online behaviour observation or netnography (called also virtual ethnography), which is studying culture and communities in the internet (Belk *et al*., 2013; Kozinets, 1997, 1998).

Box 3.8

CASE 3.1 Using mobile phones to explore the consumer-brand relationship

The Żywiec Group (member of the international brewing concern – the Heineken Group) was the main sponsor of the largest international music festival in Poland – Open'er, for 15 years. The only beer available at the festival was the Heineken brand. After many years of cooperation, Heineken decided to find out what significance the Heineken brand has for the festival-goers, if it meets their expectations, and what brand-building possibilities there were for Heineken because of its festival presence. Since it was the emotions and feelings felt by the participants during the festival that was important (and not retrospective accounts after its end), qualitative studies were carried out using smartphones. The festival-goers were tasked with creating a photostory using their smartphones, the topic of which was "Heineken at the Open'er Festival". These are the instructions they got: *"Photograph situations and write down your thoughts and reflections about everything that you associate with Heineken at the Open'er Festival, its presence, and how this brand fits in or not to the Festival. Document all important situations, both the good and the bad ones."* This approach (photostory created on a smartphone) allowed emotions and impressions to be captured as they were being experienced – "here and now".

The results of the analyses of the visual materials and accompanying captions supplied by the respondents showed that the Heineken-brand world (when the beer is being drunk and when people think about it) wasn't integrated with the world of the festival – experiencing powerful emotions associated with experiencing music, excitement, and frenzy. Unfortunately, the Heineken world, contrary to the Open'er festival world, was associated with mainly waiting for concerts to begin, involving a certain impatience before the concert. The analyses

of the respondent materials showed that the Heineken world and the Open'er world are in fact two separate worlds, probably because of the fact that the food court (including drinking court) was separate from the concert sites (where there was a complete ban on drinking alcohol).

What this study revealed led Heineken to remodel its collaboration with the Open'er festival so that the brand could be promoted not only through actually drinking the beer but also by means of a variety of visually attractive promotional materials in the concert sites (e.g., beer bottle-shaped balloons, tents lit up with green lights). This gave more exposure to the brand and the visual codes connected with it, especially at times when people were listening to music and helped establish associations with the positive emotions resulting from it. All this helped the company realise that the mere presence of the beer did not build a sufficiently strong brand. Additional elements promoting the brand had to be introduced outside the places which were set aside for consumption alone, that is, to the concert sites, which were a breeding ground for positive emotions.

The conducted study also proved useful in terms the methodology. Apart from the group that was tasked with producing an interactive photostory using smartphones, there was also a group of festival-goers that was selected to share their experiences afterwards (retrospective interview). A comparison of the materials obtained from both groups showed that the data provided by the respondents creating photostories using their smartphones were more imbibed with emotions, more expressive and involved than the traditionally collected statements (retrospective interview after the festival). On top of that, the retrospective interview failed to provide any visual material (photos), which helped gain a much better understanding of the emotions being experienced than would be possible with words alone.

Source: Maison&Partners and Grupa Żywiec (Heineken Group), 2012

Box 3.9

CASE 3.2 In-home interview tracking: understanding of the parenting magazine market

Parenting magazines directed at mothers of young children are a specific category of magazines because they are used for a very limited time only (short period directly linked to the age of the child). In 2010, there were more than ten parenting magazine titles on the Polish market, three of which were a part of the portfolio of Edipresse Poland. This publishing company wanted to increase the competitive advantage of their titles over their competition and decided to conduct marketing research to find the position of their titles in relation to the competition. The point was to find out how the magazines are perceived and identify elements of their general perception (qualitative component), and evaluate the attractiveness of specific sections of the magazines and their topics (quantitative element). The sheer volume of the material subject to evaluation

(continued)

(continued)

(6 titles) posed a considerable challenge along with the fact that a reliable assessment of every magazine would require thorough reading of the material supplies (more than 100 pages in each magazine). Another component that was important for the study was capturing the habits connected with the readership of such magazines – how they are read (selectively, comprehensively, on a one-off basis, many times over), what is read, the selection criteria of the articles that are read, and the situations in which the magazine is read, etc. The amount of information that was required ruled out the use of traditional focus group interviews. Ultimately, the decision was made to carry out the study in the homes of respondents. This was a qualitative tracking study (reconvent interview) consisting of the researcher returning repeatedly to the same respondents.

There were 50 mothers of children aged from 1 month to 2 years enrolled in the study, all readers of various parenting magazines (Edipresse or its competition). The study took seven weeks to complete. At the beginning of each week, the mothers were visited by an interviewer who brought one specific parenting magazine (one from the six titles explored in the study) for them to read over a week. During this time, the respondent was meant to use the magazine provided just as she would normally do. The only additional thing she had to do was mark the articles that she read and mark reading material that was interesting (by attaching a green self-adhesive marking tag) or boring (by attaching a red self-adhesive marking tag). The moderator would come back to the respondent after one week and first conduct a survey assessing the magazine in general, then he would go over each article that was read in detail (whether they were interesting, useful, or good in terms of substantive content). Then, the moderator would conduct a 1–1.5 hour qualitative interview, searching for in-depth information about the magazine that was read (e.g., why certain articles were left unread, why the respondent liked something and disliked something else, what formed her overall impression of the magazine). At the end, the moderator would leave the next magazine title with the respondent for a week and collect the previous one. Since as many as five titles had to be studied, the moderator met with each respondent seven times (including one introduction meeting). This amount of meetings also allowed a relationship to be established between the moderator and the respondent, allowing the respondent to feel more and more relaxed and at ease (e.g., the moderators noticed that – meeting by meeting – the respondents paid less and less attention to getting their home and herself (more casual attire) ready for the interview). An advantage of this approach is its ethnographic component where the moderator has the chance to observe the mother's relationship with her child, which turned out to be an important factor underlying the preferences of certain titles and topics over others.

This study is an example of how in non-standard research methodology, qualitative techniques (individual in-depth interviews, ethnography) can be combined with quantitative methods (surveys). Additionally unusual for qualitative research was the solution that was implemented here in the form of tracking elements (continuous repeated measurement) in the panel of respondents (repeated return to the same people).

Source: Maison&Partners and Edipresse Polska

Exercise 3.1

Consider what kind of qualitative research would be appropriate in the case of the following marketing problems.

Table 3.4

Marketing problem/Research question	*Type of qualitative research*
The manufacturer of new anti-dandruff medication sold over the counter (OTC) intends to bring the medicinal product to the market extensively supported by a national television and press advertising campaign. Thus, they want to test the advertising materials, prepared to make any final adjustments before they go to print or production.	
A company in the food business is planning to qualitatively deepen the results of quantitative segmentation research to obtain data concerning cooking routines and food preferences. The aim of the research is to gain an understanding of the segments, their lifestyle, needs, and values and, most of all, to distinguish their nutrition habits.	
A clothing company with a retail store network is planning to cyclically monitor the reception of its new collections by its customers (young women looking for relatively cheap clothing). They want to find out how their clients react to successive collections, what they like in them and what they dislike, which trends should be maintained and which the company should withdraw.	
A well-known coffee shop chain with a considerable market presence is planning global rebranding (change of name, logo, coffee shop interior, modification of its product offer). Therefore they are intending to carry out qualitative research with their customers concerning the reception of the changes in their cafe network (interior design, offering, and customer service standards).	
The manufacturer of an extensive range of women's beauty products wants to gain detailed insight into the morning and evening beauty routines of women. They are planning step-by-step morning and evening beauty routines. They want to investigate the habits and preferences in this domain, what products women choose and why, what influences the use of various treatments and products?	

Note

1 Recording an interview in marketing research may only begin once the respondent has given his/her consent (subject to the guidelines of the European Society of Marketing Research (ESOMAR) – the largest global marketing research organisation, and other qualitative market research societies).

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4 Projective and enabling techniques
A way to go beyond declarations

What are projective techniques?

Projective techniques have their origins in psychiatry and clinical psychology. Projection in the original psychoanalytical meaning is a situation where the person attributes their unacceptable traits, feelings, and desires to objects and persons in the environment. Projective techniques in their classical form are used for the diagnosis of the unconscious and unacceptable traits of a person's personality (Freud, 1864 as cited in Quinodoz, 2005; Wade, Tavris, & Garry, 2015).

Projective techniques are increasingly applied outside the domain of psychology, mainly in marketing research. Many fields related to consumer choices are unconscious, leaving the consumer oblivious to the forces driving him/her, incapable of expressing them in words. Learning about consumer needs, buying motives, and product usage, as well as the barriers to reaching for certain categories or brands, in other words, finding out why buyers act the way they do, are typical marketing research areas where projective techniques are helpful in understanding the real answer to these questions (cf. Chapter 2).

In studies on why consumers buy a relevant brand, respondents usually start with explaining that the given product surpasses rival products. However, for some products this answer, albeit logical, is not quite true. Sometimes, despite a consumer's conviction of the superiority of the brand purchased by them (e.g., better taste), these products are not distinguished in blind tests where competing brands are studied without disclosing the brand image. The reason for this may be the unconscious emotions and beliefs connected with the brand. Products, apart from their functional characteristics, can also be bought because they are a symbol of prestige, of the consumer's lifestyle, or because they satisfy the person's hidden needs: be they unconscious or ones to which they don't want to admit. These unconscious motives of product use (or not use) are virtually impossible to single out using quantitative methods or by asking direct questions within quantitative or qualitative approaches. Projective and enabling techniques harnessed in qualitative research (in in-depth and focus group interviews alike) are the most suitable for discovering unconscious motives and barriers (Branthwaite & Lunn, 1985; Belk, Fischer, & Kozinets, 2013; Gordon & Langmaid, 1988).

Projective techniques, as was mentioned earlier, have their roots in psychology and psychiatry which has many standardised instruments at its disposal. The most classical and commonly used include the Roschach Inkblot Test (Choca & Rossini, 2018; Rorschach, 1921 as cited in Multon, 2013) comprising a set of inkblot images, Murray's Thematic Aperception Test (TAT) with many sets of pictures illustrating

different social situations (Cramer, 2017; Morgan & Murray, 1935), and the Rotter Incomplete Sentence Test which has 40 standardised incomplete sentences (Rotter, Rafferty, & Schachtitz., 1949; Rotter & Willerman, 1947). The specific feature of the projective techniques used in psychology is that they comprise a fixed set of stimulus material (presented to respondents and evoking their reaction), and a wide variety of guides and manuals are available to assist in the analysis and interpretation of results (Anastasi & Urbina, 1997; Butcher, 2009; Martin & Frackowiak, 2017; Piotrowski, 2015).

Despite the wide prevalence of projective techniques in marketing, they are not understood and used in the same way as in psychology (Table 4.1). The first difference is that there is much greater freedom of choice of stimulus materials in marketing research. In practice most marketing projective techniques are constructed for specific studies where, depending on the research problem, appropriate stimulus materials are selected or developed. This is because every research problem is different and the specific materials used have to be aligned concretely to a given problem. What's more, since most studies using projective techniques are commissioned by a particular client, their outcomes are confidential, therefore their further usage for validation procedure is usually impossible.

The second difference between the projective techniques applied in marketing and in psychology consists in there being no interpretation guidance for the techniques used in marketing research, hence, analyses are made based on the overall experience and intuition of the researcher. There is a lack of publicly available information that would provide clear interpretation rules.

The third difference consists in the lack of readily available knowledge as to exactly when projective techniques should be applied in marketing research. The term "projection" has a specified meaning. In classical psychoanalysis, it means "throwing out of oneself" and appropriating unacceptable qualities, feelings, or desires to another person (or object). Projection has a less clinical meaning in contemporary psychology and is used in an even broader sense as the perception of the environment in line with one's personal interests, habits, emotional states, expectations, and desires. In marketing research, however, projection is perceived in a much broader sense as the projection by respondents of all kinds of content onto stimulus material, referred to as a projective technique. Consequently, often almost every kind of indirect question is referred to in this way (Bellenger, Bernhardt, & Goldstucker, 1976). Moreover, it should be stressed that some techniques used in marketing research are not catching projection, but are rather moderating techniques facilitating the interview.

Researchers started to pay closer attention to projective techniques when qualitative methods and motivation surveys began to gain popularity in the 1950s (Haire, 1950). At first, marketing researchers, especially psychoanalytically oriented ones, tried to apply projective techniques in the same way as they were deployed in psychology (and even in psychiatry) and, with their help, explain specific consumer behaviours using hidden and unsatisfied desires associated with the dark side of the personality. Hence, men's desire for owning flashy sports cars was explained by their unsatisfied sexual desire; men's fondness of wearing braces by their unresolved castration complex; and the pleasure of baking cakes felt by women by their strong need to give life (Belch & Belch, 1993; Solomon, 2003). At present, projection in marketing is (thankfully) not discussed in a psychoanalytical, pathological, and sexual context on the whole.

Table 4.1 Differences between projective techniques in psychology and marketing

	Projective techniques in psychology	*Projective techniques in marketing*
Stimulus material/tools	• Standardised (e.g., TAT, Rotter Incomplete Sentence Test) • Generally available tools	• No standardised tools – often construed for the requirements of a specific study • No generally available standardised tools (if standardised tools exist, they are the property of specific research firms)
Principles of analysis	• Standardised – guides, textbooks, and guidelines for specific test analyses	• No standardised analysis guidelines – based on knowledge, experience, and the interviewer's intuition
Object of projection	• Projection of unaccepted and unconscious parts of the personality (respondent's problems) onto the research material	• Projection of the respondent's beliefs, perceptions, feelings (e.g., about a brand or product) onto the study material

A classical and one of the most famous examples of using projective techniques in marketing is the often cited study on attitudes towards instant coffee conducted in 1949 by Haire (1950). Blind taste tests of the product preceding its placement on the American market revealed that most people could not tell the difference between the taste of freshly brewed ground coffee from instant coffee. Despite this, instant coffee was, at first, a dismal failure and – as revealed by surveys – consumers claimed that they don't buy instant coffee because they don't like the taste. That was when a simple projective technique was introduced in the study. The respondents were asked to imagine a woman doing the shopping and to describe her solely based on her shopping list. The respondents were divided into two groups, the only difference being just one item on the shopping list: half of the sample had Nescafé instant coffee, and the other half had Maxwell House ground coffee (at which point it should be added that there was no instant version of Maxwell House at the time). An analysis of the descriptions clearly demonstrated a difference between the perception of an instant coffee buyer and a ground coffee buyer. More negative traits were attributed to the woman buying instant coffee, especially that she's lazy, doesn't run her house well, and isn't a good wife. These outcomes revealed that the image of a "quick" and "easy" instant coffee resulted in the person buying it being seen in a negative light (that they are doing it because they are lazy or taking shortcuts), which brought on an unconscious negative bias towards the product that was rationalised as having a "bad taste" (good example of earlier mentioned post-rationalisation). These results could be obtained thanks to projective techniques and were, of course, firmly anchored in a specific cultural context and captured the specificity of a woman's position in the 1940s, in the United States. The study would probably yield completely different results if it was conducted today.

When projective and enabling techniques can and should be used in marketing research

The reasons for using projective techniques in marketing are often different from the reasons for their deployment in psychology. In marketing (contrary to psychology),

projective techniques are rarely used to reach the hidden and unacceptable parts of a respondent's personality but rather to learn about the things in consumer attitudes and feelings that respondents are not always conscious of or may find difficult to verbalise. The things that are projected by respondents in marketing research are usually not the hidden areas of their personality but rather their beliefs about research objects: products and brands, very often originating in relevant advertising campaigns (even if consumers are usually not aware of this).

Box 4.1

During discussions in qualitative research respondents have the tendency to talk about product or service features in a most rational manner (referring to quality, price, and product characteristics), whereas projective techniques can capture what is unconscious, emotional, and difficult to verbalise.

Projective techniques in marketing research are often used in the following situations:

- **Resistance against disclosure of the truth.** When we suspect that the participants may have qualms about revealing their true opinions because of: (a) a fear of social rejection (e.g., when prestige is the main reason for buying a particular brand), or (b) the topic being very personal or sensitive (e.g., a conversation about the reasons for not taking contraceptives or for giving bribes).
- **Being unaware of certain mechanisms.** When the respondent may not be aware of the real reasons behind his/her behaviour, for instance, a man can be convinced that he's drinking a particular brand of beer because it tastes better than others but in reality it's because of his susceptibility to the brand image of "beer for real men".
- **Difficulties with verbalisation.** Projective techniques work very well when certain issues in the study are difficult to verbalise. It is then easier to discuss such topics in a more symbolic and indirect manner. For example, it is very common that talking about brand images is too abstract for many people and then a simple projective technique consisting in imagining and describing a product as an animal (animalisation) or a person (personification) may prove useful in describing the brand.
- **Eliciting individual opinions.** When we want to learn about the independent opinions of every participant of a focus group untainted by the opinions of the other participants of the focus group interview. The information thus obtained complements the discussion and ensures consistency (or lack thereof) in the opinions of all the respondents. Individually performed techniques, like the Incomplete Sentence or Bubble Test, are applied for this.
- **Interlude.** This function of projective techniques is especially required when extended group interviews are conducted (e.g., taking 2.5–3 hours) or when we want to make the meeting more enjoyable. Projective techniques are introduced to spice up a drawn-out interview and give the participants a "breather", which is usually much to their appreciation (Gordon & Langmaid, 1988; Belk *et al.*, 2013).

Clearly, the reasons for using projective techniques in marketing research are not always related to projection in the traditional (psychological) sense of the word (even assuming the broadest possible definition of the term). They often serve to facilitate the discussion and evoke creative and emotional thinking in a fun and entertaining way. In fact, a better term for them would be enabling techniques since their main role is a functional one where the sought information (not necessarily denied, unacceptable, and unconscious) is retrieved from memory.

Projective and enabling techniques also play a major role in "unleashing" the respondents' memory (Bystedt, Lynn, & Potts, 2003). Interviewers in marketing research are often interested in respondents talking about their feelings, impressions, and experiences related to the past (e.g., how the person does their shopping, how they go about cooking, and how they use something). The biggest problem is that the human memory is, unfortunately, often imperfect and if the interviewer fails to take the necessary measurement tools, all that could be obtained from asking retrospective questions is a false image of reality. Respondents are often incapable of recreating this process which is why, in order to properly understand it, additional, enabling tools are necessary to help retrieve this knowledge.

When conducting marketing research, the interviewer has to be aware of the specific nature of human memory, in particular its limitations. With this in mind, they can then ask the right questions to get the information they need (disregarding the things that respondents can't tell us anyway) and introduce the very techniques and tasks into the interview that facilitate drawing this information out of their memory resources. This may, for instance, involve going back to the time when the person first used the investigated brand and, using non-verbal techniques (photographs), evoke the accompanying emotions. Such techniques give the respondents a lot of freedom to discuss the research subject at length. Below are several ways that can help memory recall (Bystedt *et al.*, 2003):

- **Asking the right questions** – the questions should relate to specific (not general) experiences and the more recent the experience is or the more important the topic is to the respondent, the greater the chance of the situation we are asking about being relatively faithfully recalled (e.g., "Can you think about and describe the last situation when you had an argument with your employer?" instead of "Can you tell me about a typical situation when you have an argument with your employer?").
- **Memory support** – the more distant the experience we are interested in is (distant past) and the less involving it is, the more effort has to be put in by the moderator for the respondent to go back in time and talk about the given situation (and not generally about these types of situations) – otherwise their statements are going to be very general and clichéd.
- **Giving time to retrieve** – the retrieval of information from memory isn't always that simple and sometimes requires reflection and purposeful thinking; respondents should be given this time, for example, by asking them to write down their thoughts, memories, and experiences on a piece of paper before the actual interview. Diaries involving the performance of certain tasks at home are also helpful.
- **Giving an enabling tool** – tasks based on associations and experiences are another useful way of retrieving information from memory. Hence, respondents can be asked to bring certain objects with them that are associated with the research subject or to perform set context activating tasks prompting information retrieval.

When asking the respondent about their experiences and opinions within the marketing research, one always has to bear in mind that the consumer is never a source of objective information about the world and that the picture that they paint in the research is just their subjective perception of reality. The human person processes all the information they receive, giving them a meaning resulting from their own cognitive and emotional structure, personality traits, needs, and values. That's why marketing research is not a source of objective truths about the world but merely provides an insight into the subjective and inner world of the consumer. If the respondent says that they are not buying a certain juice brand because it's too sweet compared to a rival product (i.e., bad from their perspective), it doesn't actually mean that the product is not sweet enough and needs more sugar for it to gain a competitive advantage. It merely implies that this is how the consumer perceives this product (in their subjective world, using subjective assessment criteria), while the assessment itself may not only result from the characteristics of the product itself but also from the brand image and many other external and internal factors alike.

Box 4.2

A person processes all the information that reaches them, giving them meaning resulting from their own cognitive and emotional structure, personality traits, needs, values, and experiences. That's why we have to remember that the objective of marketing research conducted with consumers is not searching for an objective truth about the world but an attempt to understand the world of the consumer, bearing in mind that it is subjective, internal, and perhaps completely different from the researcher's perspective or facts.

Since qualitative research is not for getting the objective but only the subjective truth, the moderator should give the respondent the sense that the point of the study is not for them to guess the right answer that pleases the moderator but for all the associations within the topic of concern, even the most unexpected and surprising, to be successfully collected. That is why the moderator has to be able to give the respondents a sense of security so that they are not afraid of saying what they truly think, expressing their feelings and impressions, and not be anxious about doing any of the tasks requested by the moderator, however absurd they may be (see Table 4.2).

Types of projective techniques: individual vs. group, verbal vs. non-verbal, relational vs. non-relational, etc.

It is very difficult to identify precisely how many and what kind of projective techniques are used in marketing research. Admittedly, there are several basic techniques most often suggested to clients, like the collage, personification, and animalisation, for instance, but there are a great many other, often proprietary, techniques and many varieties and mutations of basic techniques. Even such classical techniques as the collage, animalisation, or personification can be carried out in a number of different ways, whether individually or in a group, verbally or with visual aids.

Table 4.2 Principles underlying the introduction of projective and enabling techniques

What to look out for	*Why it's important*
Comfort of participant	**Type of task** – respondent has to feel at ease with the task, tasks can be easy (more comfortable, e.g., matching pictures) and difficult (perplexing, e.g., expression through art or role-playing – psychodrama). With more difficult tasks, particular attention must be paid to the comfort of the participants by appropriately introducing the task to be performed. **External conditions** – the interview surroundings can also be a source of comfort or its absence (e.g., one-way mirror, microphone). Giving an appropriate introduction to the interview can minimise potential discomfort. **Right of refusal** – the respondent must be given the right to refuse to carry out a task or the freedom to do it to the best of their ability (despite this being unsatisfactory for the moderator). Of course, this does not have to be stated directly to the respondent but this must be communicated to them through the moderator's overall attitude.
Introduction	**Sense of security** – every projective technique should be preceded by a suitable introduction (the more abstract it is, the greater the importance of an introduction); this gives the respondent a sense of security when carrying out a task ("there are no wrong answers", "every person is entitled to their own interpretation", "now we are going to perform an unusual task, let's feel like children for a moment . . .").
	Games – introducing a given technique as a game works very well in many cases but one must always bear in mind that projective techniques are not actual games and can't be performed just to entertain the client.
Deepening	**Follow-up questions** – most techniques are only a starting point for further work on a particular task and a deepening of the topic, hence, asking follow-up questions is essential to fully understand their significance.

However, the manner in which a given technique is performed has serious implications for the depth of the information obtained and for whether the technique truly is a projective technique (unearthing the deep and unconscious aspects), or if it is merely an enabling technique facilitating the expression of opinions and ideas. Also of importance is which psychological process the technique is based on: free associations, expression, allocation, or supplementation. This is why it is so important to clearly understand their types, the principles behind them, and their limitations as only then can these techniques truly be effective in marketing research.

Individual techniques vs. group techniques

As was mentioned earlier, the manner in which a specific task is performed – if carried out individually or in a group – is of great importance. Some techniques may only be carried out in a group, others individually, but the majority can be conducted

both ways. Even during group interviews, the same technique can be performed in a group (collaboratively) or individually (writing or drawing tasks, for instance), followed by a discussion about the completed tasks. Note, however, that the manner in which the technique is performed determines the depth and the level of projection of the data obtained. The decision as to whether a technique is performed in a group or individually should be based on what we want to achieve through the use of a relevant technique.

Individual techniques (e.g., the Sentences Completion, the Bubble Test) are useful when we are looking for the independent opinions of group interview participants and if we want to obtain the first associations of every respondent. Then, even if it is in a group interview setting, the task has to be performed individually at first, to be later followed by a discussion on the topic. If the task is first undertaken on a group level, individual associations are dominated by the opinions of other group members (e.g., those that voiced their opinions first), and the outcome of the technique will only be a reflection of the "collective knowledge" and not of individual views.

Box 4.3

When selecting projective or enabling techniques in a focus group study, the moderator has always to be aware of what impact they have on group dynamics. Each task performed individually by the focus group participants somewhat weakens the dynamics of the group. Whereas tasks performed by the whole group stimulate group dynamics.

Verbal and non-verbal techniques

Projective techniques can also be approached from the verbal or non-verbal perspective. Verbal techniques are when each respondent tells his or her story and their statement is then analysed. In non-verbal techniques, the respondent is given visual stimuli (photos, magazine, and newspaper cuttings) through which they express their unconscious associations with the brand, for instance. From the perspective of current knowledge on unconscious psychological processes, it is reasonable to assume that non-verbal techniques, provided that they are completed quickly without sparing too much thought, have a greater capacity to reach the deeper realm of the unconscious than verbal techniques. Dressing feelings or thoughts in words requires a pause for thought and reflection and this already is a certain form of adjustment of unconscious associations.

Box 4.4

The faster a projective task is performed (without the time to think responses over), the greater the chance of capturing automatic reactions and, at the same time, reaching the deeper, unconscious levels.

Most non-verbal techniques do not end on the performance of a visual task but are (and should be) usually followed by the respondent talking about his/her associations (Belk *et al*., 2013). This is essential to understand whether the associations are truly the sought-after projection of the unconscious or just a coincidence (e.g., the association was triggered only by the colour of the logo). What is important, however, is for the conversation to take place after the completion of the non-verbal projective task and not before, as only this guarantees penetration into the unconscious.

Box 4.5

The non-verbal technique has a greater chance of reaching the deeper, unconscious levels than a verbal technique. Putting feelings or thoughts into words requires reflection and consideration, and this already is a certain correction of the unconscious associations that are arising.

At this point, I would once again like to reiterate that if we want to reach the unconscious deploying visual techniques, this kind of task cannot be performed collectively in the focus group (even though it is often preferred to be conducted that way). A group assignment performed together, concomitantly, first, subjects the results to the influence of dominant group members, second, the obtained material no longer is a reflection of the unconsciousness but rather communicates the common view forged from the discussion between the participants.

Relational vs. non-relational

Projective techniques also differ in whether they are used to diagnose brands independently (non-relational) or the relationships formed between them (relational). Non-relational techniques like, for instance, a collage or personification, are mainly used to gain a better understanding of each of the studied brands, usually bypassing the relation between them. With such techniques, the introduction of too many brands is not advisable (due to the very in-depth exploration of each brand) and sticking with two–three brands is customary. The introduction of a greater number of brands leaves the respondents at a loss to create another (fourth or subsequent) extended story about the following studied brand. Another important thing to remember is that even if the client is interested in one brand only, the technique always has to be executed for at least two brands – with reference to at least one competitive brand (even in the case of the not-relational technique). Based on my experience, this is the only way to differentiate in the analysis layer what is specific to the studied brand and what, for instance, is generic to the category.

Relational techniques, for a change, are based on faster brand associations (and not on extended stories) which means that more brands can be studied (even as many as six–eight) using these techniques. A prerequisite for success is giving the respondents a relatively simple task concerning each investigated brand (e.g., animalisation or the Small Town technique involving allocation of functions in a small town), and not an

extended story created in relation to each brand of interest. With these techniques, we are not only asking about the associations with the given brand (what is done briefly) but also about the relationships between associated objects (animals, townsfolk), which are going to reflect the relationships between the studied brands. In analysing data obtained based on such techniques, we can also refer not only to associations given by respondents but also to archetypes connected to animals (e.g., lion, fox) or town inhabitants (e.g., priest, baker, or sage).

Key success factor: appropriate selection of interview stimuli

Stimuli selection

A suitable choice of stimuli material is important for the successful implementation of projective techniques. Since there aren't that many standardised and generally available techniques, the interviewer is responsible for the selection of the appropriate stimuli materials, which is, of course, not risk free. Let's imagine that respondents are making a collage from photographs for a study on the image of two soft drink brands: Coca-Cola and Pepsi. If the collage reflecting the image of Coca-Cola contains a lot of red pictures and Pepsi has many blue ones, it is not reflecting the deeper layers' unconscious brand associations but is simply a consequence of a very conscious association with brand colours. Such an outcome is, of course, indicative of the strength of the visual and colour identification of the brand but it is not, however, a projection. If we want to reach the deeper projective layers, it would be much better in that case if we removed the colours that are evidently associated with relevant brands from the set of cut-outs or, alternatively, only used black and white cuttings.

Box 4.6

The more abstract the stimulus material is in a projective technique and the less connected with the object of the study (the brand, for instance), the greater the chance for capturing projection and not just superficial and stereotypical associations.

Another important step involves the selection of the appropriate projective technique for the relevant study. The choice of technique in marketing research projects is usually subject to the individual preferences of the moderator. If the moderator feels at ease with a certain technique, they will naturally be inclined to select it more often. Apart from the researcher's individual preferences, the choice of technique should be guided by the goal of the study and by what we want to find out (see Tables 4.3 and 4.4). If we want to learn about the emotional associations with a given brand, different techniques will be chosen than if we want to gain an insight into the image of the user or consumer motives and barriers to using a relevant brand.

Table 4.3 Key drivers for reaching the unconscious mind, revealing projections, and facilitating verbalisation of hidden meanings

Task feature	*Outcome*	*Task examples*
Visual stimuli	Non-verbal tasks (picture stimuli) foster revealing projections more than verbal tasks (stories) do – smaller chance of correction by conscious rethinking processes	• Collage • Selection of pictures
Abstract stimuli, distant from research object	The more distant the picture stimuli or tasks are from the research object, the greater the chance of capturing projection and the less likely it is that conscious automatic associations will be triggered, e.g., based on colour or superficial word associations	• Abstract pictures • Schematic drawings (e.g., in the Bubble Test)
Quick completion of tasks	The faster the task is performed (first associations under time pressure), the higher the chances of capturing automatic reactions (closer to the unconscious) and the lower the chances of rethinking responses	• Sorting pictures • Fast verbal association
Individual tasks	Unconsciousness is an individual phenomenon, thus, a task performed collectively in a group setting is not conducive to diagnosing the unconscious	• Fast word association • Writing on a sheet of paper

Introducing projective techniques

In all the approaches mentioned above, not only the technique itself but also the way in which it is introduced (instructions given) by the moderator, are extremely important (see Box 4.7). A good moderator can introduce a task in such a way that the group would have no hesitations – albeit objective since the task could seem ludicrous – in carrying it out (e.g., imagining a brand is a door or writing a brand obituary). One example of a good introduction to a projective technique is presenting it as a fun game or as brain training. One thing to say could be:

> Now, I have a fun game for you all. Imagine that a fairy has just come in the room and, with a wave of her magic wand, has transformed these three shampoos in front of me into people. How would you imagine these people, what are they like, what do they look like, what are their likes and dislikes? It would be great if you could tell me a bit about them now.

Box 4.7

Examples of "Planet" projective technique instructions (own method)

Now, I would like to propose a game to unleash your imagination. Imagine that a new planetary system has been discovered with three new planets: BMW, Mercedes, and Volvo. In a moment, we're going to begin our journey by visiting each of them

one by one. We'll start with BMW. Now, imagine that the spaceship has landed on planet BMW, the doors of our vessel are slowly opening and . . . what do we see? What is this world like? Does it have any towns or cities? If so, what do they look like? What kinds of people live there? What do they do? How do they spend their time? Etc. Please don't answer these questions just yet. If you could first take a look at the pictures lying on the table in front of you and then each of you select three to four pictures that fits in any way with you association with planet BMW.

(Once every person has completed this picture choice task and the cuttings have been placed on the board together, respondents are requested to move on to the next brand-planet composition. Once the compositions for all the brands-planets have been created further discussion is undertaken to ensure the first tasks performed for each brand are non-verbal in nature.)

What is this world like? What kind of planet is BMW? What does it look like? What are its inhabitants like? How do they live? What do they do? How do they spend their free time? What hobbies do they have? What kind of personality, character traits do they have?

(Only after this discussion can questions be asked about specific photos, especially those that seem to be inconsistent with the image created of the planet.)

Why has this picture appeared here? What does it express? How do you associate this picture with planet BMW?

(After the probing for one brand-planet is completed, the moderator asks about the following brand-planet.)

The success of projective techniques in marketing research is also dependent on the moderator's inner conviction of the purposefulness of the task. If the moderator doesn't feel comfortable with the given technique and isn't convinced that they will be capable of getting the right information from it, the participants will read this from his/her non-verbal cues and they themselves will start to feel hesitant towards the technique. If the moderator feels as if they are doing something stupid by assigning a given task, the respondents will jolly well realise this and most probably not want to do whatever he/she asks of them. If the moderator is genuinely, firmly convinced that this seemingly pointless task is truly worth the effort, they then stand a chance of unearthing their subject of interest and probing layers of knowledge far surpassing declarations.

Projective and enabling techniques most commonly used in marketing research

Sentence Completions: an individual technique

This is a set of incomplete sentences which every participant has to complete individually (Belk *et al*., 2013; Greenbaum, 1993). The idea of this task is based on one of the more classical and more frequently used projective tests in psychology: the Rotter Incomplete Sentence Test (Rotter & Willerman, 1947). This is a very well documented and evaluated

projective test in psychology and is standardised with the same set of incomplete sentences to complete. In marketing research, however, it is adapted specifically for each study based on the subject of the research and the preferences of the researcher.

Since there are no indications as to what such a test should look like (the content of the sentence beginnings), every researcher relies on his/her own experience and intuition. This is why the specific marketing goals (what we want to find out from the Sentence Completions) should always be kept in mind when developing the test and forming the sentences. Decisions concerning the sentence content must be based on the answers to the following validating questions: why do we want to introduce this sentence, what will the answers to these questions give us, will I find out anything more than I would if the question was posed directly, and how should I formulate the sentence to find out exactly what I'm looking for?

Just like there are no rules concerning sentence beginnings in the test, there are also no guidelines as to the length of the task. Hence, one should never forget that projective techniques are merely enabling techniques, one of many elements of marketing research, which is why they shouldn't be too long or time-consuming. Experience shows that the marketing Sentence Completion task should consist of six–eight items.

Sentence Completion is used when we want to discover the associations with a relevant brand(s) or product category and consumer reactions to given marketing problems (e.g., "When I use brand X I feel . . ."; "For me, sport is . . .", "When I think about electric cars, I feel . . ."). An additional, functional argument in favour of using this technique in group interviews is the need to control the associations of individual respondents. In this situation, the projective value of the task carried out is not as important as the functional reasons. It is important to note, however, that this technique in actual fact is not of great projective value.

Bubble Test: an individual technique

The Bubble Test involves writing captions to characters from a story presented in a cartoon (see Figure 4.1). There are usually two characters in the story, one of whose narratives have already been provided and the other requiring filling in. Another version depicts a conversation between two brands or products. This tool best fulfils its function in line with the principles of projection outlined above, when the cartoon is as schematic as possible and contains as little information as possible or provokes a certain kind of response. The more schematic it is, the greater the chances of the respondents incorporating their true feelings or beliefs into the captions and the less probable it is that they were provoked only by the very form of the cartoon.

This tool, like the Sentence Completion, is a verbal technique and involves respondents writing down their statements (i.e., the reaction is not automatic, is corrected by rethinking). Therefore, its projective value is limited. Similarly to the Sentence Completion, it may be used for controlling individual associations in a group interview. The Bubble Test is usually administered when we are interested in various associations with the product or brand and, in more general opinions and beliefs, linked to the situations and behaviours (e.g., associations with eating breakfast cereal or using banks) or a reaction to certain communication (e.g., an advertising slogan or advertisement). Sentence Completion is very useful when we want to uncover conflicting attitudes or capture sensitive topics (Bystedt *et al*., 2003).

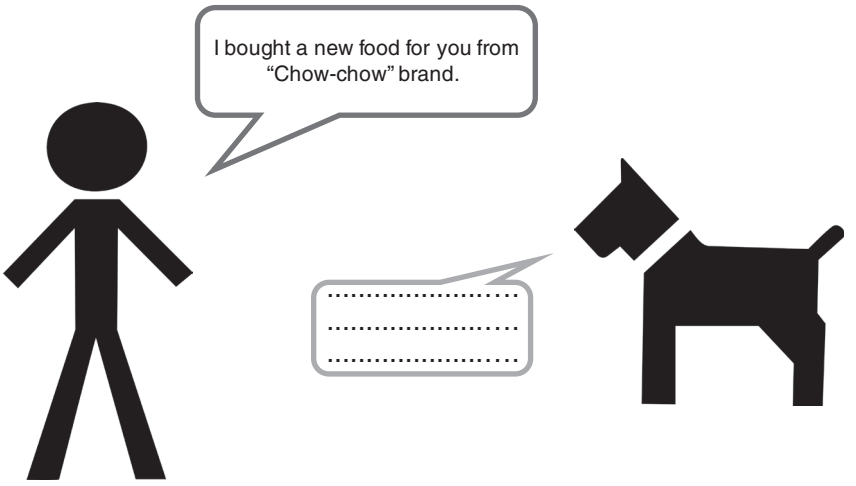


Figure 4.1 "Bubble Test": example of research materials. Task for respondent: to imagine and write down his dog's reaction towards a new brand of dog food.

Personification: an individual or group technique

Personification is probably the most popular projective technique in marketing research. In reality, however, many variations – the projective value of which is very different – hide under this name. Generally speaking, the personification technique (regardless of its version) consists in imagining that a product or brand is a person (Bystedt *et al*., 2003). Then, depending on the version of the task, participants are asked to describe the imagined brand/person in detail (e.g., how she/he looks like, character traits, tastes and preferences, activities, education, and profession, etc.), the milieu (the products it uses that suit it, the car that it drives, its home), or social setting (e.g., get-together of different persons/brands), etc.

These tasks can be carried out individually and in a group setting, in which case all the participants in the group create one common image of the brand/person. In my opinion, I think that personification in a group setting – despite its popularity – does not fulfil its role as a projective technique. First, there are many pitfalls for the created notion, mainly, that imagining the brand as a person may lead to the first label being given (e.g., MacBook => hipster => long beard => originally dressed => against mainstream), after which we are no longer dealing with brand (MacBook) personification but stereotypes triggered by the first label given (hipster). Second, the specific nature of a group interview is such that the first person's voiced associations affect the associations of the rest of the group. If the technique has to be deployed in a group setting, the moderator should direct the task accordingly, preventing the most active persons from dominating the created image. One solution to this group-setting issue could be having respondents write down their personal associations on a sheet of paper and moving on from there to creating a common image. The first associations written down can be a helpful indicator to the moderator as to the extent to which the picture created by the group truly is a "collective image" and not merely the result of the dominance of a few group members.

At this point, it is worth mentioning that searching for the "image of the brand in society" is different from creating this image collectively in a study setting. What we are trying to understand with the help of projective techniques is a certain image, often unconscious, associated with the brand, which is shared by the members of a given society. Nevertheless, this should not be mistaken with this image having to be developed in a group activity during a focus group. In my opinion, individually diagnosed and independent associations are of much greater value and are, if done repeatedly, the most authoritative source of information about the brand image shared by the society (cf. Chapters 2 and 8).

As I mentioned before, there are many variations of personification techniques, the best known being: the Brand Party, the Family Game, and the Small Town. All these techniques are also relational in the sense that they also attempt to diagnose the relationships between the studied brands apart from their independent conceptions.

Brand Party

Here, respondents are tasked with imagining that brands are people at a party (Bystedt *et al.*, 2003). The moderator enquires about various dimensions of every person/brand (their appearance, personality, behaviour) and any related information like where they live, what their home looks like, what their profession is, where they work, what their family situation is, and what their relationship with their milieu is like. The main objective of this technique is getting to know brand perceptions as a person, nevertheless, it also has a relational element to it because the narrative created by the respondent may also concern the interactions present at the brand/person party.

Due to the complex perception of each brand, an in-depth examination of more than three brands is not advisable in this technique (e.g., the client's brand plus two rival brands). The more complex and elaborate the created image of the brand/person is, the less brands can be the object of study. If we introduce five brands to this task, the imagination of the fourth and fifth brand/person will, most certainly, be superficial and schematic.

Family Game

This variation of personification consists in imagining (or rather placing) specific brands as members of one family and aims at determining the relationships between them. The perception of specific brands isn't very deep here but this approach actually allows more brands to be investigated (even up to six to eight). The technique provides lots of useful information on the way these interactions between different brands are perceived. The Family Game is also useful in understanding the interconnections between different types of the same brand products, or various types of products of the same umbrella brand (e.g., shampoo, shower gel, soap, body lotion of the same brand).

In this technique, not only is the role in which a given brand is placed crucial (e.g., as a daughter, mother, or grandmother), but above all the kind of person it is and the part that it plays in the entire configuration (family) of the personified brands. One person may give the particular brand a father role because the "father is the head of the family and someone who is respected", while another may be guided by the fact that the "father has authority and control over everything". A brand may be perceived as a grandmother because it is a beloved grandmother who is the embodiment

of wisdom, while for another it may be a mean old bag that nobody respects. Since the same associations can have different meanings, apart from the place in the family attributed to the brand, the ensuing discussion – trying to understand the reasons behind the associations made – is just as important.

The Small Town

This is the most relational technique out of all those described so far. The approach consists in the study participants attributing all kinds of roles/functions present in a small town to a set of brands, for example: a priest, teacher, mayor, judge, shopkeeper, and homeless person, etc. The assigned roles are later discussed (just like in the Family Game), but the image of a given person/function attributed to the brand is not extensively elaborated but rather used to interpret the archetype of this function (e.g., priest or homeless person). Since this task relies on fast, schematic, and automatic associations and multiple functions in a town, it lends itself perfectly to screening the largest number of brands at the same time and is capable of handling as many as 10–12 brands.

User image: a group or individual technique

One technique which is often confused with personification is the User Image (Bystedt *et al*., 2003). Here, respondents are tasked with imagining persons who can use a given brand. Many people think that since an image of a person is created in this task, it's the same as personification. Sometimes the performance of these tasks does indeed produce similar outcomes but the brand image and user image are different techniques, have different goals and usually give different results. Personification is a technique harnessed mostly to diagnose the image of the brand, whereas the user image gives us insight into the brand use motives or non-use barriers (which can be unearthed by creating an image of a person who is not a user of the studied brand) (see Box 4.9).

The user image can be developed both verbally and non-verbally. I personally am an advocate of the non-verbal technique based, for instance, on sorting through snapshots of persons who look like users and non-users of a given brand. The quicker and more automatically the task is carried out, the greater the chance of the unconscious feelings towards the brand being revealed, and thus, of understanding the often unconscious motives and barriers relating to a given brand. This task can be performed individually and in a group setting.

Animalisation: an individual or group technique

This approach relies on imagining that the studied object (brand, product, or institution) is an animal (Greenbaum, 1993). The respondent has to visualise the studied brands as animals; this should be based on automatic associations. There is a greater chance of the true projection being revealed if it is the first associations of the brand with animals that are captured and not the processed thoughts of the respondents. A discussion usually follows the series of brand associations where respondents endeavour to explain where given associations of theirs came from. This helps clarify things further and avoid misinterpretation. An interviewer must always bear in mind that not all the associations have to be a reflection of unconscious brand images – sometimes they can have different

origins, based on personal experience or linked to a brand's existing symbol (e.g., the lion in the ING bank logo or the horse in the Ford Mustang logo).

Despite the large emphasis placed in projective techniques on the ensuing clarifications of the respondent (and not just on the associations themselves), it should be kept in mind that the respondent is not always capable of justifying his/her associations and that this is something that has to be accepted, seeing that the assumption is that they are often a reflection of unconscious brand associations. This is why the archetype human personality traits attributed to animals (e.g., dog – loyalty, fox – cunning, and owl – wisdom) are also closely examined in the interpretation of animalisation outcomes aside from the explanations of the respondents themselves.

Animalisation is a very useful technique in the diagnosis of emotional associations with brands or other researched objects (also abstract). What's more, thanks to the stereotypical endowment of human traits to animals, this method can provide a wealth of knowledge about the brand personality. The technique, just like personification, gives the users the chance to express even the most irrational concerns, feelings, and impressions of theirs, which would otherwise never be aired (in response to a direct line of questioning).

Animalisation, as well as the user image, can be carried out both verbally and non-verbally by allotting the studied brands to a set of animal pictures or portraits prepared earlier.

Collage: a group or individual technique

A collage is a composition of magazine and newspaper pictures, words, and symbols used to illustrate a certain marketing problem (e.g., the brand image, or the world of a given brand/product) (Bystedt *et al.*, 2003; Greenbaum, 1993). A major benefit of this technique is its initial non-verbal nature facilitating unconscious disclosure, thanks to which (if performed properly) it can be considered a true projective technique revealing the unconscious which would otherwise remain hidden (during an ordinary discussion). We must not forget, however, that not every composition of magazine and newspaper clippings will constitute a projection – it all depends on what the respondents were tasked with and how it was executed (more automatic, conducive to reaching the unconscious, or more thought-out).

Collages, similarly to personification, are carried out in a variety of ways and the differences lie in the kind of stimulus material given, the allocated task to the respondent, and the situation in which they carry the task out (individually or in a group setting). First, the stimulus materials used can have a varying degree of standardisation. The most standardised form is based on a set of identical photographs prepared earlier, which are used in every interview within a given study and sometimes even in every study (irrespective of the topic). Collages, where the interview participants are given magazines and newspapers from which they select the illustrations they need to complete the task, are the most informal of approaches. An advantage of this casual technique is giving respondents complete freedom to choose their own materials without imposing anything on them. However, this method is definitely more time-consuming and, at times, respondents may end up actually reading the magazines instead of creating the collage with which they were tasked. I favour a consensual approach where the respondents get ready-prepared, large sets of cuttings matched to the relevant task (without complete articles which may become a distraction). However, I do think that an identical set of cuttings are not required

for every interview because their main purpose is to stimulate the imagination of the respondents and, as such, they have no diagnostic value on their own.

If we opt for using a ready-prepared set of study materials (magazine and newspaper clippings), their selection should be subject to the research questions and objectives. If, for instance, we are interested in whether or not a given brand of shampoos is perceived as natural or as a laboratory and technology innovation product, a set of pictures symbolising what is natural and healthy (e.g., fruits, herbs, plants, and sports) and what is top quality and high-tech (e.g., microscope, test tube, and pristine whiteness) is needed. These sets should, of course, contain lots of neutral (buffer) photos so as not to give away to the respondents the very dimensions we are testing.

A collage is usually a much-liked and happily performed task. It is, however, time-consuming; assuming that 3 brands are going to be tested, we usually need to allocate 20–30 minutes of group interview time for its completion and the ensuing discussion. Also in this case we do have to remember that not only the sets of illustrations chosen by the respondents but also the commentaries to them are an important source of information and a key element of the task executed. The composition is often taken as a starting point for further projections which is why, once the collages have been created, it's good to prompt the participants to unleash their imagination and continue their narrative, bringing their associations, images, and emotions to the fore. Projections are often triggered not only when the tasks are presented as an "illustration of their associations with the brand" but also when asked to imagine the "world", "island", or "planet" of the brand (based on the moderator's preferences) and create a composition that best reflects this world, island, or planet (see Figure 4.2).

A collage is traditionally a team-effort technique used during focus group interviews. However, just like in most group techniques, the domination of one or two persons, and practically the whole task being performed by those few, can pose a problem. One solution and – at the same time – method which I myself have used for many years, is constructing the task so that every participant is required to select two–three pictures for the composition (see Box 4.7). Another way around this problem is splitting the group into smaller, three–four-person teams responsible for set tasks. This breakdown facilitates the involvement of all the group participants and reduces the task disengagement and withdrawal opportunities of the less active persons in the group.

A collage is a technique that isn't just used to study product brand images but it's also very useful for investigating the images of services, various institutions, and abstract concepts (Havlena & Holak, 1996). We can imagine, for example, that it can be harnessed for surveying airlines. The photos selected by the participants for four compositions: British Airways, Lufthansa, American Airlines, and Emirates, can be an interesting reflection not only of the conscious beliefs and opinions on the service quality of these airlines but can also emulate many emotional and less rational feelings connected with these brands which would otherwise not be manifest in a normal conversation. In standard discussions, respondents have a tendency to talk about the characteristics of a product or service very rationally (making references to the quality, product features, and specifics of the offer), whereas projective techniques can capture the unconscious, emotional, and difficult to verbalise factors.

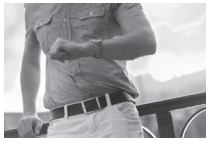
The explanations of the respondent as to why he/she selected given illustrations are crucial to the proper and fair interpretation of projective techniques (see Figure 4.3). However, as I mentioned earlier, respondents aren't always capable of justifying their

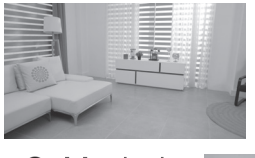
LIPTON

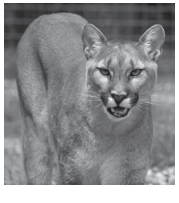
Yellow (colour) – brand identification code, associated with joy, warmth, sun, and optimism.

Youth – young, beautiful, and smiling people.

Modern – technology, urban lifestyle, and professional life.





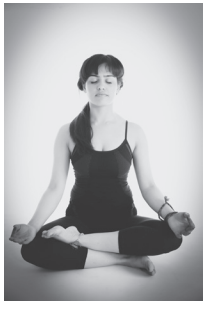


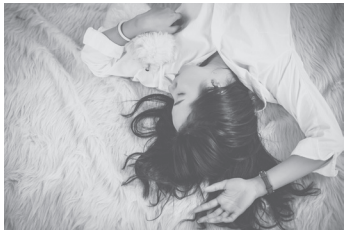
Speed – life in constant hurry and stress.

Cold – lack of emotions, superficial interpersonal contact

TETLEY

Great Britain – the most distinctive feature of the brand.





Harmony – peace, calm, balance in all life spheres, and living life without any hurry.

Tradition – English tea drinking tradition, a celebration of life, the past as a source of knowledge and experience, family values.

Nature – living close to nature.

Figure 4.2 Collage-themed "The Planet of the Brand": an example of presenting the results of brand image research for Lipton and Tetley.

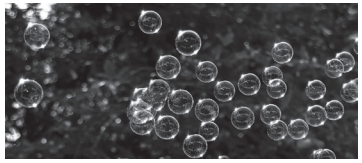


Figure 4.3 Collage-themed "The Planet of . . ." people with Multiple sclerosis (MS) with explanations of respondents: research diagnosing the basic problems of people with MS. The results of the research were used to create a social awareness campaign in support of MS (interviews with people with MS – mini focus group interviews).

choices and that's exactly when there is a very big chance that the association will reflect the projection. Sometimes the explanations of the respondent are important because they can even help the interviewer avoid errors in their interpretation. In one study on three cosmetics brands, the respondents were meant to create a "world" for each of the brands in question. One of the brand compositions had a photo of a very old woman placed right in the middle. This could point to an "ageing" brand image. However, the ensuing discussion revealed that the reason behind incorporating the photo in the collage was the chamomile bouquet the old woman was holding. So, in reality, the photo was a reflection of an association of the given brand not with old age or sadness but with being natural and with nature.

The association test: an individual or group technique

Searching for specific word associations is a very straightforward technique. The task should be performed quickly (approximately 3 seconds per association) to capture the first, automatic, and "uncensored" associations by the consciousness. This is also a way of finding out what's in the *top-of-mind awareness* when thinking of the object of study. This tool is highly useful to test new product and service names prior to their placement on the market. In the analysis, the focus is on whether or not a given word evokes any negative associations, what the root cause of this could be, and can it jeopardise the brand's reputation or have negative consequences for the product's success on the market. With positive associations, attention is paid to whether the associations are consistent with the planned product image and if the name communicates what was anticipated. And one shouldn't forget that the point of this task is not to find out what the respondents are fond of but what associations are triggered by a given stimulus.

Individual associations can also be a good entry point into a group discussion. Group interview participants may, for instance, be asked to write down on a sheet of paper the first associations that come to their mind in connection with brand X and then have these associations discussed in the group. This will allow us to avoid any bandwagon effects and gives us the opportunity to examine a higher number and more unusual associations than if the study was performed in a group setting.

Associations can even be evoked using graphic materials. The respondent's task would then be to select one set of illustrations (e.g., portraits, a set of animal photographs, or abstract pictures) best fitting each studied brand. The task should be carried out quickly, based not on the thoughts of the respondent but on their first reactions and automatic associations.

Box 4.8

What we are trying to understand thanks to qualitative research and projective techniques is a certain image of brand-related associations that is present and shared in a given population. However, this should not be confused with the fact that this image has to be created in a group task during a focus group and shared by all focus group members. The analysis can be based on the associations of individual respondents (in individual or group interviews) which, based on an analysis, create a consistent picture of the researched issue.

Chinese portrait

This is yet another technique that also relies on associations. Here, the respondent is required to quickly associate the studied brands X (e.g., belonging to fashion category) with brands from other categories or with various objects. The moderator states, for instance: "If brand X was a car, what brand of car would it be?", "If brand X was a perfume, which brand would it be?" The respondents then have to swiftly make the associations with the studied fashion brands. Another variety of this method is using objects instead of brands for the associations (e.g., imagining the brand as being a type of car) or more abstract phenomena like the seasons of the year: "If brand Y was a season, which one would it be?" (Greenbaum, 1993).

In actual fact, there are no clear-cut rules as to which associations with which object and for what kind of research problems this research technique should be used. It is down to the interviewer and his/her individual preferences to select the right association object for the study.

Examples of enabling techniques

There is a wealth of enabling techniques deployed in qualitative market research that essentially do not relate (even in the broadest possible sense) to projection. Their role is to support the research process and to stimulate and elicitate the discussion but they sometimes facilitate penetrating into the realm of the unconscious (although not necessarily projective in nature) associations. These enabling techniques are usually

Table 4.4 Characteristics of projective techniques

Technique	*What it entails*	*Verbal/ Non-verbal*	*Performance (group or individual)*	*Level of projection*
Sentence Completion	Completing unfinished sentences	Verbal	Individual	Small
Bubble Test	Writing down statements or thoughts in response to the presented situation	Verbal	Individual	Small
Personification	Imagining a brand is a person	Verbal	Individual or group	If individual – large; if group – small
Animalisation	Imagining a brand is an animal	Verbal or non-verbal (pictures)	Individual or group	If individual – large; if group – small
Collage	A picture made of magazine/newspaper cuttings	Non-verbal (pictures)	Individual or group	If individual – large; if group – small
Verbal associations	Attributing automatic associations to the studied object	Verbal	Individual or group	Average
Non-verbal associations (picture selection)	Selecting pictures evoking associations with the object in question	Non-verbal (pictures)	Individual	Very large

less abstract, making them more suitable for use with average qualitative research participants. Respondents also like these tasks because they are an interesting enrichment of the discussion.

Mapping/perceptual maps

Product mapping (see Figure 4.4) is one of the most popular enabling techniques that shows how brands available on the market are perceived (out of a given product category), what criteria are important in brand perception and what features serve as the basis for formulating judgements and opinions, which brands are similar and which are more distant, as well as which dimensions determine their proximity or distance. Mapping is also very useful for diagnosing the relationships between many brands (objects) in a fairly short time. It even allows for a comparison of as many as ten or more objects. Product mapping is particularly useful when we want to understand how new products are perceived (prior to their launch into a market) in light of the current market situation (perception of competitive brands).

The technique is used in focus group interviews. Respondents are tasked with quickly (to ensure capture of automatic reactions) grouping products into categories so that each group contains the most similar products, but for the formed groups to be as different from each other as possible, for example, everyday use and special occasion brands, brands for the young and for the elderly. These categories can be imposed by the moderator or invented spontaneously by the respondents. What is important, at the end of each grouping task, is that the respondents are asked to explain the grouping criteria applied and exactly why relevant brands were classified to a given group. Only then can we discover what exactly people were guided by (even if they were unconscious of this process) when making inferences about a given characteristic (e.g., the shape or colour of a bottle shaping the image of the product inside).

Apart from its information value, this task is usually also engaging, fun, and enjoyable for the respondents. The respondents have to get out of their seats, stand around a table, and complete the task together. Seeing that various people's perceptions of the studied objects aren't always similar, the task leads to a discussion, which is also an important source of information. Different forms of materials can be used in the task, ranging from more specific, like real-life products (their packaging), to more abstract forms like photographs of packaging, logos, or sheets of paper with brand names written on them. Depending on the material used, we can gain better insight into the role of packaging or the image of the brand in product perception.

One example is a task where the respondents had to group shampoos into "natural" and "synthetic". An interpretation of the results based on the groupings demonstrated that the feature on which the respondents based their inferences about how natural or synthetic a shampoo is, was its transparency. Coloured (green, orange, yellow) and transparent shampoos were considered as natural and based on herbal and other organic ingredient formulas. White, pearl, and opaque shampoos were seen as "synthetic" or "technological" and created using advanced laboratory techniques. These findings were, of course, based on the interviewer's interpretation of the completed task and not on the direct statements of the respondents. The respondents themselves would never have specified such a dependence because the described product feature inferences (between the perceived and inferred characteristic) are usually unconscious.

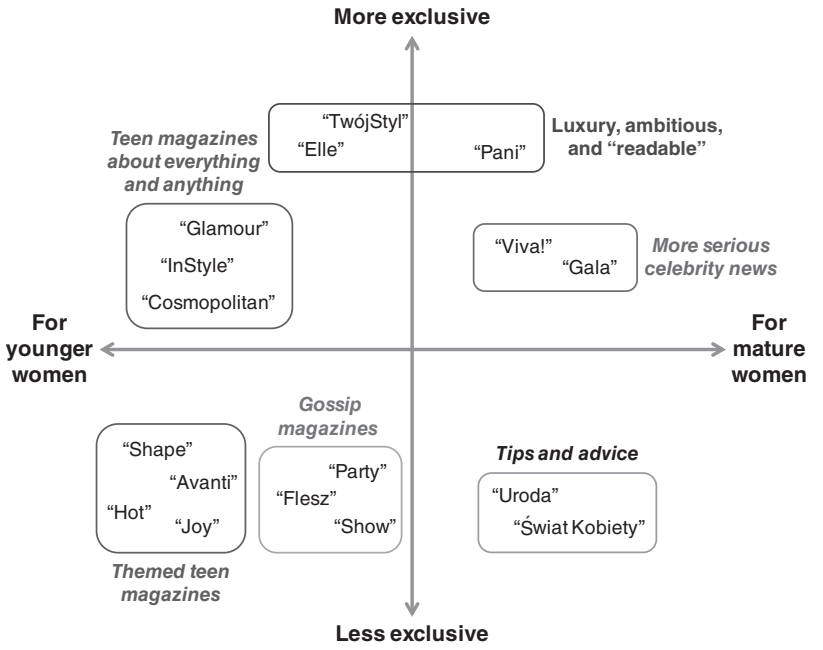


Figure 4.4 "Perceptual mapping": example of focus group interview results presentation. The study concerned was on perception of women's magazines (names of titles available on the Polish market) (see Box 5.15; Case 5.1).

What's most important in this kind of task is that the participants are not meant to talk about their experience with given brands but about their perceptions of them. This can tell us a lot about the not always completely rational and conscious convictions about brands. Let's consider the same shampoo example and assume that the task concerns grouping shampoo brands according to their foaming performance. Respondents are often not familiar with all the brands but they can still group them in terms of set criteria (provided that we're asking about their perceptions and not their knowledge – "what do you think, which shampoos look like they foam up well?"). Only then can we infer based on the results obtained that the feature on which consumers form their perception of whether a shampoo foams up well or not is, for instance, its more or less intense colour. In turn, when grouping shampoos into cheap and expensive ones, it may well turn out that price is indicated by the perceived quality of the product triggered by the shape of the bottle. In the described study, shampoos with more angular bottles were perceived to be "outdated", "lower quality", and, therefore, cheaper; whereas more oval shaped bottles were held to be more modern, utilising advanced technologies, better quality, hence, more expensive.

Photo-sort

Another enabling technique is photo sorting where the task itself is similar to product sorting (mapping) but its objectives are comparable to those used in collages. This technique requires much less time than a traditional collage. The task of the

respondents is to sort the photographs prepared earlier (e.g., of people, objects, landscapes, or abstract pictures) as fitting a given brand of product or not. If photographs of people are sorted, the task can also be used to study the images of the users of a given brand or product category.

Diary/homework/pre-task

Doing homework and keeping a diary are also enabling techniques augmenting qualitative research. A diary in itself isn't a projective technique but the tasks set out in a diary can incorporate certain projective techniques (e.g., a collage). A diary is, however, an excellent way of getting more information out of a standard qualitative study than can be derived from group or even individual interviews (Patterson, 2005).

With this approach, respondents keeping a diary usually have set tasks to carry out several days before the actual interview, which are more or less directly related to the topic. Some of them may require more thought than others and have a varying degree of difficulty. Depending on the research objective, respondents may be required to write down all their meals throughout the day along with the ingredients (verbal task relating to past experiences). Other tasks may include creating a collage (from magazine clippings) about an "ideal vacation" (specific, non-verbal task) or about "happiness" (abstract, non-verbal task). Yet another task may involve photographing important elements from the respondent's surroundings or situations illustrating the research subject (e.g., health, safety). These techniques give us an insight into associations with abstract concepts that couldn't be accessed during an ordinary discussion.

The data obtained from such homework tasks first increase the amount of data for analysis and, second, provide material that can be used during interviews (individual or group). The interviewer can make reference during their enquiries to tasks performed earlier, ask about certain things that came up in those tasks, and seek clarifications. When we can build on tasks that required some effort and thought on the part of the respondent, the interview itself is deeper and more concrete than if the same questions were asked during a traditional interview without any pre-tasks. The respondent moves beyond clichés and generalisations and talks about specific and well-thought-out matters. Let's compare healthy lifestyle study situations, for example. If this is one of many interview topics, the statements of the respondent often reflect their wishful thinking or their ideal image of themselves (e.g., "I live a healthy life"). If, however, the respondent had the time to complete some tasks relating to the study topic (e.g., a diary of daily activities and meals) beforehand, we have more realistic information than wishful declarations.

There are many more projective and enabling techniques available than the ones described here. Some techniques are licensed and can only be used by specific research or advertising agencies but most techniques used in marketing research are generally available. Some are developed by moderators in the course of their practice and are only deployed by them personally. The techniques applied by an interviewer usually reflect the needs resulting from the research goals as well as the individual preferences of the researcher: which techniques they prefer and feel most comfortable with.

Analysis and interpretation of projective and enabling techniques

Constructing a projective technique is less of an issue than the correct interpretation of results (Krueger, 1994). Contrary to the projective techniques used in psychology

and psychiatry, there are no interpretive standards in marketing, which carries with it the risk of error and the wrong conclusions being drawn. The absence of standardised textbooks does not mean an absence of rules, however. The first rule is to use in analysis contextual information derived from the entire study accompanied by other available data. During the analysis, attention should be given to whether or not the projective test conclusions are consistent with the other results available and if they can be explained using them (Branthwaite & Lunn, 1985). The clarifications collected from the respondents once they completed the set tasks can also assist with interpreting projective techniques. That's why, once the task is completed, the outcomes are discussed with the respondents (e.g., where given associations came from or the significance of specific photographs). In many cases, the statements of the participants explaining their associations are a more important source of information than the associations themselves. However, another thing to bear in mind is that projective techniques, by definition reaching the unconscious, may – and in fact should – paint a different picture than what is obtained in response to questions directly posed to the respondents.

Projective techniques used in marketing research are often criticised for the subjectivity of interpretations resulting from the absence of rules concerning their analysis. A corollary of the absence of interpretive rules and guidelines can be the overinterpretation of the results of projective tests or the excessive influence of the interviewer's own views (his/her own projections!). The appropriate analysis and interpretation of outcomes, in the sense of them being as objective, accurate, and reliable as possible, depends on the researcher's general psychological knowledge, his/her grasp of the intricacies of qualitative methods and projective techniques, and his/her experience in applying these methods in a marketing context.

The analysis of results obtained using most projective techniques in marketing is an analysis of the response tendencies and results overview in a studied group (diagnosis of the problem), and not a scrutiny of one person's statements (diagnosis of the person) – which is one of the major differences between projective techniques deployed in psychology and those used in marketing research. Conclusions are drawn not about the respondent but about the research object like, for instance, the brand image, the position of the product relative to the competition, and the dominant needs and motives underlying brand acceptance or rejection, etc.

An analysis of projective techniques first of all consists in searching for recurring associations (principle of repeatability – cf. Chapter 8). Repeatability can have a direct form when different respondents have exactly the same association (e.g., exactly the same wording in the Sentence Completion test: "This club is . . . *for rich people*"). Different Sentence Completion wording but with the same meaning can also be treated as a repetition (e.g., "This club is . . . *for rich people,* . . . *for people with money,* . . . *for directors,* . . . *for yuppies*"). A similar approach is taken to the interpretation of a selection of collage clippings or photographs. Here, our first concern is the recurrent stimuli appearing in literally the same form, followed by looking for similar categories of various forms of stimuli.

Next, the associations observed in different groups, for example, between users of brand A and B, are compared. The users of comparable, rival brands (e.g., Coke vs. Pepsi, Starbucks vs. Costa) usually justify their brand preference with better quality (e.g., that it tastes better). With such brands, however, most consumers don't actually distinguish them in blind taste tests. This is why data collected from projective

techniques can provide vital information about the more emotional and unconscious motives (in the case of brand users) and barriers (in the case of non-users).

Looking at the outcomes of projective techniques, one should also eliminate those responses that could suggest automatic associations not constituting a projection (e.g., repetitions in advertising slogans, proverbs, common sayings, and colours or symbols of the brand). Such associations say little about the true feelings of the respondent and are merely an automatic repetition of set slogans or associations, thus, they cannot be considered an authentic projection. One should also remember that projective techniques should be interpreted qualitatively and not quantitatively. Repetition should be treated as a general guidance that a given field is pertinent but no inferences can be made about its strength in the population based on its frequency (i.e., if something came up seven times, it doesn't necessarily mean that it is more significant for people than something that appeared four times).

Considering that projective techniques are not ends in themselves, the last step in projective technique analysis is to approach the findings from the marketing objective of the study. This means that if, for instance, the study concerned the brand image, one should consider what can be said about the brand image in light of the research outcomes.

Box 4.9

CASE 4.1 How to overcome the social desirability effect: research on the potential of Warsaw as a short city break destination

Weekend getaways are becoming increasingly more popular and Paris, Rome, Barcelona, and London are still at the top of the list for Europeans. Polish cities are much less popular in these terms. The Town Hall of the Capital City of Warsaw decided to enhance Warsaw's potential as a target city break destination and, to do this, they decided to conduct a qualitative study among the residents of several cities across Europe. The first study was conducted in London. The study consisted of four focus groups with people who occasionally go on weekend getaways to European cities, where two of the four groups were people who had never been to Warsaw, and two with respondents who have already visited Warsaw (although not necessarily for pleasure).

Those who had never been to Warsaw claimed that they would very much like to spend a weekend in Poland's capital ("Why not?"; "I think it might be a very interesting city"; "I think I could learn a lot there"). However, the non-verbal communication revealed an absence of enthusiasm and genuine interest in the respondents with respect to travelling in this direction and suggested that their responses are rather due to the social desirability effect and not genuine interest in travelling to Warsaw for a weekend break. Hence, an additional (initially unplanned) "Portrait" projective technique was included, which uncovered the real and not directly revealed barriers connected with Warsaw as a short city break destination.

The task of the respondents was to select one portrait from a set of six of a person who looks like someone who had spent their short city break in Warsaw

(continued)

(continued)

and is (a) happy with their stay or (b) unhappy, and then to tell a short story about that person, what they do, what kind of a person they are in terms of their character traits. The stories about the people on the portraits created by the respondents were surprisingly similar within a given task and, at the same time, the portraits of a person who was happy with their weekend getaway in Warsaw and unhappy with their stay were very different. A person happy with their trip was usually portrayed as a single person, for instance, a middle-aged woman, working in a library or a government office, who likes reading books – especially about history – in her free time and who doesn't have much of a social life. During her trip to Warsaw, she spent her time in museums, especially ones concerning the Second World War and the holocaust. The results of the applied "Portrait" projective technique brought the greatest image barrier for Warsaw out into the open – perceiving it as a sad, lifeless city solely reliving its past, permeated with the atmosphere of the Second World War, good for sad and alienated history enthusiasts who aren't interested in having fun, enjoying life, and meeting new people or gaining hands-on experience. A comparison of the results from this group with the impressions of people who have already been to Warsaw revealed that Poland's capital actually makes a completely different and very positive impression on people – as an interesting and colourful city bursting with life.

These findings led the Warsaw Town Hall to change their communication strategy directed at people living abroad by moving away from highlighting the historical significance of Warsaw and pointing to the contemporary and emotional character of the city. And so came about the "Fall in love with Warsaw" motto and a vibrant logo promoting Poland's capital city.

Source: Maison&Partners and the Town Hall of the Capital City of Warsaw

Exercise 4.1

The task is to carry out at least two three–four person groups. Each of the groups creates a collage using newspaper and magazine clippings around the topic of "The World of the Brand" for two competitive brands belonging to the same category (on two separate boards); where Group 1 creates a composition for one category (e.g., cars: Toyota vs. Volkswagen), and Group 2 for a second category (e.g., airlines: Lufthansa vs. Emirates). Next, the two groups swap tasks; hence, Group 1, which created the car collage, looks at the airline composition prepared by Group 2. The persons from Group 1 analyse the compositions made by Group 2 and try to interpret the visual material (what are the common elements for the two brands, that is, what should be interpreted as generic for the product category, and what is specific to each brand, that is, what should be interpreted as specific and unique for the brand). Then, the group that interpreted the results presents its own interpretation to the authors of the composition. Only then can the authors of the composition share how they imagined this world and explain what underpinned this selection of photographs to illustrate the world of a given brand.

Follow the steps below to complete the task:

1 The participants are divided into two groups and each group creates a composition around the theme of "The World of the Brand" for the two brands in the product category allocated to them (e.g., cars or airlines).
2 Each group is given two boards, a set of newspaper and magazine clippings, glue or adhesive tape, and a felt tip pen. The group creates a "The World of the Brand" themed collage from the clippings, on separate boards for each brand.
3 The groups change places and interpret each other's collages (basing only on the visual materials delivered by the other group).
4 Once they have done that, both groups come together around the boards created for the first category (e.g., cars) and discuss the materials in the following order:

    - The interpreting group presents their interpretations of the visual materials to the group which created the composition.
    - The group that created the composition tells them how they imagined this world (additional verbal information to be used in the ensuing final interpretation) and provides feedback as to whether the interpretation gives across their underlying intentions and explains why they included certain pictures (special attention should be given to those elements of the composition that are not obvious to those interpreting them, which is exactly why they require clarification).
    - The interpreting group fine-tunes its final conclusions about the researched brands, integrating the information coming from the visual material as well as the verbal explanations and clarifications provided by those that created the collage.

5 The steps described in point 4 are repeated for the other product category (e.g., airlines) and the two brands in this category (e.g., Lufthansa and Emirates).

N.B. During this exercise, special attention should be given to the following aspects:

- What can be garnered from the visual material alone (without any verbal explanation)?
- How useful are the explanations of the authors of the composition? What extra information do they provide? Were they consistent with the interpretation of the visual material?
- What information was gleaned from the compositions on the non-verbal level, what did they "say" about the emotions and feelings, and what information was obtained about the unconscious areas connected with the researched brands?

Exercise 4.2

The producer of good quality tea present on many markets cannot manage with the persistently low marginal share of its brand in the market of one of the countries in which it has been present for a long time. Its brand has a relatively large familiarity but a very small share in the market. The manufacturer is afraid that brand image problems underpin this. The conduct of eight focus group interviews has been planned: two with users of this brand and six with users of other competitive

brands (four focus groups with users of two of the largest brands on the market [two per brand] and two focus groups with brand switchers). Suggest the application of two–three projective techniques or enabling techniques that would help diagnose the position and image of the client's brand. Describe what a given technique will be diagnosing, what the tasks for the respondents will consist of, and what should be the instructions for the respondent.

Exercise 4.3

Go back to Exercise 2.2 concerning understanding barriers relating to the introduction of insect-based protein to food. Think of a new (non-existent) projective or enabling technique which is not described in the chapter and which could be used in focus group interviews (mini-groups) in order to understand these barriers:

- Create a new (non-existent) projective or enabling technique that could be used during such an interview.
- Describe what this technique will be diagnosing.
- Describe what will be the task for the respondents and write down the instructions.

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5 Step 1
Defining the research questions and research schemata

Beyond moderation: different stages of qualitative research

Many people see qualitative research, particularly focus group interviews, from the perspective of conducting interviews alone, without appreciating the significance and importance of the phases preceding moderation and following it (Knodel, 1993; Singh, 2015). Moderation, in other words, the conduct of an interview, is just one of the phases in qualitative research. Apart from moderation, qualitative research has its fixed and critical stages that are crucial to success, which are:

(a) Defining the research problem.
(b) Designing the research schemata and research planning (defining the number of respondents, the number of interviews, the location, selection criteria, and choice of the moderator, etc.).
(c) Setting up the interviews (recruitment, preparation of the interview guide and research materials, e.g., projective techniques).
(d) Conducting the interviews (moderating).
(e) Analysis and interpretation of results.
(f) Write-up of a report.

A different side might be responsible for each of these phases: a researcher in a research agency or the client (see Table 5.1). There are, of course, some exceptions from these rules. Sometimes, the client goes to a research agency with a ready definition of the research problem, research schemata, or even interview guide. This usually happens when the client has extensive research experience or if the study is part of an international process where inter-country study coherence is required.

I am of the opinion, however, that even if the client makes most of the decisions concerning the study, they should always run the research questions intended to be the starting point for the whole research process by the researchers so as to discuss them in a marketing context. This will give the researcher (interviewer) a better understanding of the research objectives and clarity as to exactly which questions need answering (and not only asking!).

Defining the research area: from marketing questions to research questions

The first phase of the research, regardless of whether a qualitative or quantitative approach is used, is to appropriately define the research problem – specifying what exactly we want

Table 5.1 The phases of the research process and the person usually responsible for its execution

Phase of the research process	*Person responsible for execution*
• Defining the research problem	• Client – person responsible for the project on the client side – or researcher in research agency (often both: client and research agency)
• Establishing the research schemata (characteristic and the number of groups/interviews)	• Researcher in research agency (with the client's approval)
• Planning – defining the selection criteria, assigning the number of groups/ interviews and the location; selection of the moderator, etc.	• Researcher in research agency (with the client's approval)
• Preparing for interview execution	
(a) Recruitment, technical, and organisational aspects	(a) Research agency fieldwork department or external fieldwork agency
(b) Preparing the interview guide and the research materials, etc.	(b) Researcher in research agency responsible for the execution of a given study (with the client's approval), sometimes the client him/herself
• Execution (moderation of interview)	• Moderator/interviewer (research agency) – sometimes the same person as the researcher charged with the study, sometimes somebody different. Usually several persons for large projects
• Analysis and interpretation of results	• Moderator/interviewer or qualitative researcher (sometimes it is the same person, sometimes a different one)
• Drawing up of the report, presentation of results	• Moderator/interviewer or qualitative researcher (sometimes it is the same person, sometimes a different one)

to find out and what information we are interested in. Once we know precisely what we want to unearth, the next step is to consider whether the planned research can actually provide us with the information we are after (Ertz, Lecompte, & Duriff, 2017). This phase is critical for the success or failure of the entire research process (Mariampolski, 2001). An incorrectly defined research problem and badly formulated research questions could lead to the selection of the wrong research method and, consequently, to the information collected in the study failing to resolve the client's marketing problem.

Box 5.1

Inappropriately worded research questions at the beginning of the research planning process will lead to the selection of inappropriate methods and, consequently, to supplying information from the study that may not solve the client's marketing problem.

The significance of this phase is often undervalued by both researchers and clients alike, resulting in the client's marketing problem not being given sufficient time or analysis to be considered thoroughly and profoundly enough (Park & Park, 2016). It is common in marketing research practice that the client commissions qualitative research, expecting the moderator to ask the respondents a set of questions, without earlier discussing the goal of the study with the researcher. Unfortunately, a study planned (or, in fact, unplanned) this way, usually does not give the client what he/she wanted to reach from the study. Collaboration with the client often mistakenly begins from handing over a topic guide to the moderator.

I thoroughly recommend that all research projects start from the moderator first discussing the marketing goals and research problem with the client. Then, based on the outcomes of such a discussion, considering the following. First, will the qualitative research provide the information required, or would quantitative surveys or experimental approaches be more suitable, or perhaps the marketing problem cannot be verified using consumer research and, instead of that, other analyses should be applied (e.g., internal data analysis, desk research, etc.). Second, if we come to the conclusion that marketing research is required and that a qualitative approach is most appropriate, we should consider which specific qualitative method could best unearth the answers to the marketer's questions (Sinuff, Cook, & Giacomini 2007; Tracy, 2010). Although explicit questions for focus groups to be conducted usually appear in requests for research proposals,[1] after analysing marketing and research questions, other methods like individual interviews, dyads, mini-groups, in-home interviews, or creativity groups would often be more suitable (cf. Chapter 3).

Box 5.2

The first and crucial (and sometimes forgotten) phase of the research process is the formulation of research questions (goals); the methods that will allow us to obtain the information answering these questions should be selected later. The method is secondary in relation to the research questions (goals), and not the other way round.

Imagine the relatively common problem of a decline in market share of a product. If we want to conduct consumer research in this setting to get us back on track with our marketing activities, before choosing which method of research would be most fitting, we should first identify the underlying reasons for this situation by formulating valid marketing hypotheses/questions. The market share slump may be down to external factors that are not directly linked to the product itself, like changes in the market situation due to competing products appearing on the market accompanied by an intense promotional campaign. Another reason for this market share decline could be a change in consumer habits that does not result from a change in the quality of the product (e.g., consumers are now looking for products containing less fat). The reasons for this could also be tied to the product itself, for instance a deterioration in its quality (absolute or relative in relation to a competitive offering) or its wrong packaging, price, advertising, or distribution. Each of these hypotheses/marketing questions

translates into research questions. Thus, each of these hypotheses requires different methods and approaches, without forgetting that some of them may simply be impossible to verify in consumer marketing research (see Table 5.2).

Change in market situation: arrival of new competitors

Prior to starting the consumer research, we have to check whether the fall in sales of the product is not down to a change in the market situation triggered by the arrival of new competitors. In this situation, the first thing should be analysing the sales figures. If, however, our question concerns how the new product is perceived by consumers compared with our product, we can proceed to the study phase, which should involve qualitative research. In this case, focus group interviews could be used where consumers can express their opinions, convictions, and impressions of the available products.

Distribution problems

If we suspect that the sales issues result from distribution problems, this too cannot be verified in consumer tests but requires an analysis of the market situation (i.e., the firm's internal materials). If it turns out that the problem requires further research, business-to-business (B2B) studies, which probe the distribution network, are more appropriate here than consumer research.

Changing consumer habits and behaviour

Excluding the first two hypotheses (no new brand has been launched, the drop is recorded throughout the entire category, and there aren't any distribution problems) we can assume that the sales decrease results from changing market trends. Therefore, we might need feedback from qualitative research on the prevailing market trends, habits, and behaviours relating to this category (e.g., to improve the product or its communication). The ethnographic research-type of qualitative method is often used in such situations, where in-home interviews combined with an observation of product use-related behaviours are harnessed.

Product quality problems

If we suspect that the sales problems may be linked to the physical product characteristics, like its taste, smell, consistency (regardless of whether the problem results from a drop in product quality or is relative to a better quality rival product debuting), the only research method that can provide us with the answer to this question is an experimental quantitative study (conducted on purposive samples). The research schemata will then depend on detailed research questions, however, in general, blind tests comparing our product with the competition and blind vs. branded tests should be run. In this case – despite this sometimes being the practice – qualitative research, especially focus groups where the opinions of some respondents can become overbearing and dominate the group, are definitely not advisable. It is unfortunate that the product tests investigating physical properties are so often erroneously conducted using qualitative research and this is probably the most common methodological mistake made in marketing research.

Another thing to bear in mind is that for many fast moving consumer goods, especially those with strong brands, the brand image has great bearing on the sensory perception of the product despite consumers oftentimes being completely oblivious of this (see Chapter 2). When products are tested in focus groups, we often obtain clear and strong opinions from the respondents, for example, "too sour", "fruit are too small", "too bubbly". However, when the same products are tested in a fully controlled experimental study, many times no differences are observed in the perception of the product, which means that the statements found in focus group interview settings are nothing more than rationalisations of the emotional relationship with the brand and not down to any real problems with the product features.

Sometimes consumers spontaneously share their opinions about products on the occasion of qualitative research being conducted in relation to other issues (e.g., "I don't like this coffee because it's too bitter"). Regrettably, the clients taking part in such studies often wrongly cling on to such statements, forgetting that this is not a method of verifying product characteristics.

Marketing communication problems

Another reason for a downturn in sales could be the wrong marketing communication resulting from, for instance, inappropriate packaging (communicating the product to be too expensive or outdated), or bad advertising (using communication which is inappropriate to the target group or creates an undesired impression of the product). If we want to test hypotheses concerning decoding (understanding) the advertising message or the packaging communication (elicited associations), qualitative research is appropriate and the most fitting are in-depth interviews (individuals or dyads where the mutual impact of respondents has been minimised and we can penetrate the network of associations of every respondent.

If, however, we suspect that the problem may be caused by an incorrectly set product price and we want to verify this using research, it is definitely not qualitative methods that should be used but quantitative pricing research tools that should be deployed instead. Qualitative research (both focus groups and individual interviews) used in this context is not suitable for three main reasons. First, each person has their own acceptable price range – a price that may be cheap for some people, could be expensive for others (and, importantly, this is not directly dependent on a person's income – Maison, 2013). This is why we can never know to what extent a given statement heard in a qualitative research setting tells us anything objective about the product features (e.g., if the product is indeed more expensive compared with rival products), and how much of the respondent's individual price sensitivity and approach to money it gives across. Second, price is a highly sensitive psychological dimension and, despite appearing to be objective, oftentimes is a subjective reflection of the perceived quality of the product in the consumer's mind. Third, when consumers make statements about prices, they relate to their own market experience and not to the mechanisms governing the market, which could set different prices than wished for by respondents or be considered as appropriate by them.

One example of this is the situation accompanying Edipresse publishing company launching a new glossy women's magazine on the Polish market at a 50% lower price compared to rival products. The reactions of female respondents mostly observed in

Table 5.2 Marketing questions vs. research questions and the choice of research methods based on the marketing problem of a "drop in market share of a product"

Marketing hypotheses/questions	*Research questions*	*Research method*
Change in market situation – arrival of new competitors	• What share in the market does our product have compared to the competition? • How our product is perceived in relation to how the rival product is perceived?	• Market analysis (resigning from consumer research) • Analysis of sales data • Qualitative research (e.g., FGIs)
Distribution problems	• Is our product available everywhere we intended it to be?	• Analysis of the distribution network – B-to-B research (resigning from consumer research)
Changing consumer behaviour	• How and in what situations do consumers use a given product category? • What products could replace our product?	• Ethnographic research • In-home IDIs
Problems with product quality (physical product features)	• Is there anything in our product's characteristics (e.g., sweetness, density, aroma), which is wrongly perceived by consumers? • How are the specific features of our product perceived against the competition?	• Experimental research (quantitative)
Problems with marketing communication	• How is the packaging perceived (packaging communication, functionality)?	• Experimental research (quantitative) • Qualitative research (individual interviews better than group)
	• Has the price of our product been set correctly (too low, too high)?	• Quantitative research (pricing research) – perception of the price vs. the quality and/or competition • Market analysis – comparison of the prices of the competition
	• How is advertising communication perceived (what does it communicate about the product)?	• Qualitative research (individual interviews better than group)

group discussion were: "This is not good; only tabloids cost this much; I'm not going to buy such a magazine", and they suspiciously probed how something of such good quality could cost so little. Of course, the respondents were unaware of the fact that a large portion of the magazine's budget came from advertising and not from sales, which is why they can sometimes continue to be profitable while significantly cutting the price. The market clearly proved that this was a good strategy but one would not expect to hear such feedback from respondents in a qualitative approach.

Designing research schemata: quantitative thinking in qualitative research

Research planning is a stage where many detailed decisions are made in order to build research schemata such as with whom should the interviews be conducted (what respondent recruitment criteria to apply), how many interviews should be run, and in how many locations (detailed research schemata). The success of the future study and whether or not we will get to the very information that we are after depends largely on the answers to these questions. The turnaround time and expenses are also consequences of these decisions. This is the stage where good and bad decisions can equally easily be made (Knodel, 1993; Mariampolski, 2001; Parker, 2004). A major difficulty is that there never is one best solution. It is often a decision that involves a trade-off, for instance, by cutting the number of interviews, we lower the quality of the results, however, at the same time we are also shortening the turnaround time and the total project costs.

Lamentably, the importance of this study phase is seldom duly appreciated, which often leads to schematic and rash decisions being made of the following sort: "Let's do four focus groups, two in one city and two in another" (Basch, 1987; Burrows & Kendall, 1997). For one thing, the decision regarding the number of interviews should not be used as the starting point when designing the schemata but should, in fact, be one of the last decisions made and be based on a deep and penetrating analysis of what it is exactly that we want to find out and, above all, who we want to talk to. For another, perhaps it is not focus groups that should be used at all and we may, quite unnecessarily, want to travel to another town because we may well find the right respondents in one city.

Planning the research schemata is deceptively simple but much more challenging in practice, which is why so many mistakes are made at this stage (Meyrick, 2006). Inappropriate decisions made as to whom we should talk to often end in the wrong conclusions being drawn and the research questions at the core of the whole project remaining unanswered. When laying down the respondent selection criteria for qualitative research, especially during research schemata determination, thinking rooted in quantitative experimental research method is, paradoxically, very helpful.

Box 5.3

The importance of the planning phase is often undervalued, which leads to schematic and rash decisions being made. The decisions as to what qualitative methods should be used and how many interviews should be conducted should result from an in-depth analysis of what we want to find out and who we want to talk to in order to achieve our goals.

Choosing the right respondent: selection criteria

In qualitative research, as in any other research, selection of the right respondent (so often underappreciated) is crucial. The precise determination of who exactly the study participants should be is one of the most important decisions made in the study design phase (Curtis, Smith, Gesler, & Washburn, 2000). In quantitative surveys, respondents

have to be selected for the sample so that they best represent the studied population, enabling generalisation of the findings to the entire population. When a bad selection is made in such a study, the quantitative results are flawed and cannot be trusted (e.g., 20% of the particular answer in the sample can be very far from the opinion represented in the population).

Sample selection in qualitative research, however, is always purposive and subject to the research goal (Parker, 2004). Since the goal of qualitative research is getting to the bottom of the problem by insightfully probing it, the study participants should be selected with a view to finding out as much information as possible from them and obtaining the most meaningful and valuable data. In this case, a bad selection means obtaining information that falls short of the research goals. Unfortunately, these things do happen and usually result from using quantitative thinking from surveys (overemphasising the significance of demographic variables in sample selection) when setting the criteria for qualitative studies. This usually is because the client, knowing the demographic specifics of its users, endeavours to recreate this structure in the qualitative study, treating demographic characteristics as the most important (e.g., women, 25–35 years old, mothers with 1–2 children, with a $1,000 income per capita), forgetting about the much more significant behavioural criteria relating to the studied issue (e.g., use of the relevant product category, use of a specific brand, manifesting certain behaviour) or associated with the needs that this product can satisfy. Imagine that we want to place a new kind of premium margarine fortified with vitamins positioned as a margarine for older people. If we invite respondents to the study guided only by demographic variables (e.g., age and income), it may turn out that we don't have a lot to talk about with many of them (because they are staunch supporters of butter, for instance, or they categorically refuse to include margarine in their diet). In this situation, openness to using margarine and a specific attitude towards nutrition are much more important criteria. What's more, if our product is going to be a premium product, the fact of using margarine and other foodstuffs from a specific price group is a more important criterion than the amount they earn. Since we are focusing on the proper purposive behavioural variables other demographic variables like the education and age of the respondents are no longer relevant. Of course, on a statistical level, it may turn out that the use of premium food products correlates with the demographic variables but the harnessing of these variables in selection would fail to guarantee that our discussion would involve the right persons.

Box 5.4

A common mistake when selecting respondents for qualitative research is overestimating the significance of demographic variables in the selection criteria and underestimating the much more important behavioural criteria, which are directly linked to the use of a given product or brand category.

Another mistake in laying down the selection criteria for the qualitative study that also stems from the quantitative research study sample selection logic is attempting to pick the participants on a random or quota basis (in the sense of recreating

the structure of the population in the characteristic of participants). A sample in qualitative research is not big enough anyway to create a suitable representation of the population. This is why there is no point whatsoever in striving to recreate the demographic structure of the population (e.g., in terms of the sex, age, or education) on a quota basis in the focus group as it only disrupts the homogeneity of the groups and still fails to ensure demographic representativity of the population. Because of this, it's best to give up the idea altogether and, instead of that, focus on specifying the purposive criteria as best as possible.

Before the issue of selecting respondents for qualitative research is discussed in detail, a distinction must be drawn between two types of decisions accompanying the laying down of selection criteria: decisions concerning the selection of persons for the whole study (selection criteria common for all groups – *sine qua non*), and decisions on the diversification of the groups, their number, and composition (selection criteria diversifying the groups – determining the research schemata). The decision pertaining to the criteria common to all the study participants is usually easier and doesn't affect the research schemata. However, the decisions regarding the differentiating criteria are often more challenging and do have a direct bearing on the research schemata (number of interviews) as well as the validity of the conclusions drawn from the study (Knodel, 1993). The decisions concerning the criteria common to all groups and differentiating them will be discussed separately as each of them involves different factors and a distinct decision-making process.

Box 5.5

The first thing that we should define at the selection criteria decision stage are the selection criteria common to all groups, which are a vital condition of participation in the study (this often is the use of the product category), and then we define the criteria differentiating the groups (e.g., used brand), which ensure differentiation between interviews and determine their number – these are the criteria shaping the research schemata.

In qualitative research, picking respondents should be subject to two purposes: (a) gleaning the most information possible about the given topic, and (b) limiting the variance between participants in order to minimise the effect of uncontrolled and, at the same time, irrelevant for the topic variables on the results and, for focus groups, make sure that the participants are made to feel comfortable and at ease to freely discuss the relevant topics (Haverkamp, 2005; Templeton, 1994). I propose to look at the selection criteria for qualitative marketing research from two perspectives: (a) significance for the research goal and determining research schemata – essential criteria and (b) importance for the quality of data – additional criteria (see Table 5.3).

- **Essential purposive selection criteria** – these are criteria that are study-specific, result from the research goals, and are of key importance in eliciting information (e.g., being a user of a given brand of product) – the participants should be selected so that as much relevant information as possible can be obtained from them.

- **Additional criteria** – these criteria are decisive in the homogeneity among the study participants, minimising the effect of confounding variables. These usually include basic demographic characteristics such as sex, age, income, and education. Theoretically, the participants should be selected so that the group is as homogenous as possible in terms of the basic demographic characteristics, fostering greater comfort between group interview participants. However, in the case of individual interviews, maximising homogeneity of the respondents in the sample reduces the chances of the picture of results being distorted by the imbalance of the characteristics irrelevant to the research subject that may unnecessarily influence the results (e.g., the level of education or income). Other additional criteria could include marketing research experience (where usually less experienced people are preferred) or professional ties with the area of research (apart from expert interviews, persons with no professional ties are favoured).

Two independent perspectives can be taken on the respondent screening criteria: (1) essential criteria – the significance of the criterion for the research goal and determining the research schemata: (a) common for all respondents and (b) differentiating criteria, and (2) additional criteria – the importance of the criterion for the quality of research results: (a) linked to the study goal and (b) linked to the study method. A specific criterion like the use of a product of a given category (e.g., drinking instant coffee) may also be a common and essential criterion, whereas the use of a precise brand of coffee could be a differentiation criterion and an essential criterion at the same time (users of the Nescafé brand vs. the Tchibo brand). Yet, if we are conducting separate interviews with women and men, the sex of the respondent could be an additional criterion and a differentiation criterion, too.

Box 5.6

Many people overestimate the significance of additional criteria (usually demographic characteristics) and treat them as the most important criteria in the qualitative research. Criteria based on behavioural variables (essential purposive criteria), like what a given person uses, what they buy, how they behave in the context of the research subject, etc., are much more useful.

Essential criteria: purposive criteria

When thinking about recruitment criteria, we should always start by defining purposive criteria that determine the sample and are therefore crucial to our study (Knodel, 1993; Lincoln, 1995; Shaw, 2008; Stiles, 1993). If, for instance, the study concerns the barriers to using a given brand of coffee, the first criterion that should be precisely defined is the issue of being a user of a category and a user of a specific brand of coffee. Contrary to what one might expect, this is not always straightforward because it is not enough to define it on a theoretical level (person drinking coffee) but one also has to operationalise it by specifying a desired frequency of drinking coffee (e.g., at least three–four times a week).

Among the purposive criteria, some may be common to all respondents (common selection criteria – Table 5.3), while others could be differentiating criteria determining the research schemata and number of interviews (differentiating selection criteria – Table 5.3). The product category is often a common criterion in marketing research while the brand is frequently a differentiating criterion. For instance, in carbonated soft drink consumer research, the common criterion could be regular drinking of fizzy drinks. The differentiating criterion, however, could be drinking specific brands like (a) being heavy-users of 7Up (our brand users); (b) being heavy-users of Sprite (competing brand users); (c) being a fizzy drink drinker but unattached to any brand (category users not loyal to any brand).

Box 5.7

Decisions on the study design begin from analysing the behavioural variables related to the marketing problem and should constitute the essential purposive criteria for the creation of the study schemata and assign number of interviews. The next criteria, like demographic variables or interview location, are additional criteria, which we define in second place.

Setting out the purposive criteria seems easy at first glance, the problem is, however, that it is not always clear which criteria exactly this should concern. This happens particularly often in studies related to the placing on the market of new products when the research should be conducted with potential users of the product – its future target group. If, however, nobody is actually using the product yet, it is very difficult to foresee who will actually become its user (as this doesn't always coincide with the group the manufacturer set for itself or the one that uses the given product abroad). If the potential user group is not adequately defined, the group of respondents will also be inappropriate. A frequent mistake in setting out the persons for such studies is defining the target group based on demographic data alone. If the product is innovative and quite expensive and we are guided by stereotypes, we will want to talk to young, high-income earners; whilst forgetting the essential purposive criteria linked to the potential needs that the product could satisfy, we will very likely not be talking to the persons we should be.

Additional criteria: demographics

Additional criteria are ones that are introduced into the study, in a sense, "just in case". They are not essential to the research goal but have a supplementary function and, thanks to ensuring the homogeneity of the interview participants, they facilitate fieldwork and the ensuing drawing of conclusions (see Table 5.3). Demographic variables usually perform the function of secondary criteria. Laying down the demographic participant selection criteria, despite appearing to be straightforward, also presents difficulties and creates many doubts. For this reason, this sub-chapter will deal with the basic selection principles in terms of the four main – and most debatable – demographic characteristics of sex, age, income, and education.

Table 5.3 Types of selection criteria and their characteristics

Selection criterion	*Characteristic*	*Example*
Essential purposive selection criteria	Study-specific criteria resulting from the research goals. Failure to meet these criteria defeats the purpose of participation in the study (essential criteria includes both common and differentiating criteria)	
Common selection criteria	Meeting these criteria is a prerequisite for study recruitment and the same criteria apply to all the study participants	Use of the category (e.g., drinking coffee a certain amount of times per week) Going on holiday at least once a year
Differentiating selection criteria	Criteria determining the research schemata and the number of interviews (FGIs or IDIs) – the diversification of the interviews depend on this	Use of the investigated brand vs. use of the competing brands (using specific brands of coffee) Holidaying within one's own country vs. holidaying abroad
The **additional** selection criteria	Additional criteria are defined later on (after the essential criteria). These criteria aren't treated as rigorously as the essential criteria and can often be given up altogether	
The **additional** criteria linked to the study **goal**	If we want to make sense of the variety of views based on these variables, they will affect the research schemata (the number of groups envisaged). If they are only used as a control, they will not impact the research schemata. Controlling them helps to ensure that the group or entire study remains homogenous	Demographic variables such as age, sex, income, and education usually fall into these criteria. They have repercussions for the research schemata when we are planning to separate people having different characteristics (e.g., younger and older persons or women and men and have them as participants of different groups)
The **additional** criteria linked to the study **method**	Customary criteria used in most qualitative research for the following reasons: • Minimising recruitment abuses • Excluding inappropriate respondents (e.g., experts in ordinary consumer research)	Minimisation of recruitment abuses: • No recent participation in marketing research • Participants don't know each other Exclusion of inappropriate respondents: • Links with marketing • Professional ties to the research subject (e.g., selling cosmetics in consumer research on cosmetic use)

Box 5.8

The significance of demographic variables in respondent selection is often overestimated in qualitative marketing research. If a strong purposive criterion (like being a loyal user of a specific car brand, being a dog breeder, a cycling trip enthusiast) connects both women and men or persons of different ages, combining them to take part in the same group interview doesn't pose the slightest problem.

Sex

The treatment of sex in the selection of qualitative research participants has not been completely clearly set out and is most questionable in the focus group context. It is sometimes argued that women and men shouldn't take part in the same group interview or dyad. This is not always the case because it all depends on the research problem and the culture. If the topic is neutral and concerns women and men alike, they can, successfully – at least in Western culture – take part in the same discussion group (e.g., use of mobile phones or banking services, opinions on pension scheme advertising, and drinking fruit juices). An argument in favour of separating the sexes and conducting independent interviews for women and men is having a sensitive topic. If we expect the topic to make the male and female respondents feel uncomfortable or self-conscious in each other's presence, for example, personal hygiene, appearance, etc. Other topics that could have the same effect are ones concerning gender role stereotypes, like cooking, looking after children, repairing and maintaining cars, DIY jobs. In mixed sex groups, such topics intensify the self-presentation of respondents, which could lead to a false picture of the results. This situation increases the probability of the statements being in sync with the social roles stereotypes or being ostentatiously in denial of them, instead of reflecting the personal convictions of the interview participants.

Conducting separate interviews for persons of different sex is also desirable if, from a marketing point of view, both women and men are an important target group for us and with the assumption that each of the groups can hold clearly different views on a given topic. In recent years, an example of research that commonly is conducted separately with women and men but where the members of both sex are included in the study, are automotive market research, particularly concerning needs. This is one case where marketers avoid the mixing of women and men in one group because of their often divergent car needs. Women in general value different things in cars (safety and appearance being more important than technical parameters) than men (where technical parameters prevail over safety and appearance), thus, in effect, there is a different decision-making process taking place in both groups. Since, however, the number of female car owners and users is gradually increasing, as is their role in car purchase decisions, interviews with women are also increasingly being taken into account in such studies, and although the tendency is still to keep these two groups separate, this is not a hard and fast rule but depends on the specific research topic.

Even if the users of the category are both women and men but we come to the conclusion that it would be better for the study topic not to be mixed sex in the same groups, it is not always necessary to conduct separate interviews with women and men. Sometimes interviews with one demographic group only (exclusively women or men-only) are sufficient. Such a decision can be reached if, from the point of view of the product, one group is clearly more important due to it involving the dominant category user. Then, interviews only with that group are conducted with the assumption that uncovering the deep-seated opinions of one side – more engaged with the relevant problem – suffices to reach crucial marketing decisions. Additionally, this involves smaller research expenses and reduced turnaround time. Following this approach, most of the research on foodstuffs and household cleaning products are conducted with women alone, despite the fact that men also purchase and use these products. The assumption is made that enlisting the exclusive opinions of women is good enough for making strategic marketing decisions since women make up the bulk of the viewers of advertisements for

this product category and also the vast majority of buyers and users. However, it should be borne in mind that there will inevitably be a shift in this due to progressive cultural changes, family model metamorphoses, and changing gender roles. Men are involving themselves increasingly often in areas which have, until recently, been reserved exclusively for women (cooking), and women in areas usually treated as male (like the already mentioned automotive field). Such social changes will, without a shadow of a doubt, also impact the ways in which qualitative research will be run and particularly the decisions relating to the study recruitment criteria and the research schemata.

Age

Another commonly used qualitative study participant selection criterion is age. Age is an important variable both in terms of the consumer behaviour studied within marketing research and from the point of view of social behaviours and functioning in a group setting. However, its significance in the selection of respondents is often overestimated. Introducing this criterion to research on products directed at a specific age group (e.g., acne treatments or medications for menopause) is relatively obvious. In other cases, however, age is not a critical factor and we should essentially be guided by the principle of homogeneity (uniformity) of the group. An excessively large age gap between focus group participants could give rise to barriers and prevent people at the extreme ends of those age groups from freely sharing their views. The maximum age difference generally considered as acceptable between respondents is 20 years, but this obviously is just convention and depends on the research problem itself. If the participants are clearly linked by a different criterion (e.g., mothers of children less than 24 months of age or classic car enthusiasts), age becomes less important.

It is worth emphasising, however, that even if the users of our product are persons of different ages (e.g., ranging from 20 to 60 years), interviews with the representatives of each age group are often not required (this is not quantitative research!). All we do in such circumstances is limit the age of the study participants in relation to the age of the target group by choosing the most important age range from a marketing perspective (e.g., 25–40 years of age). Another solution would be to conduct separate interviews with two age groups: 20–40-year-olds, and 41–60-year-olds.

Too large an age difference between the respondents could be problematic not just in focus groups but also in individual interviews. True enough, there no longer is the problem of homogeneity in the individual interview (since only one respondent is interviewed) but this could create a serious problem with the interpretation of results. If, for instance, the study objective is understanding the differences in motives or barriers relating to the use of brand A and brand B (essential purposive criteria differentiating the research schemata) and there will be too big a discrepancy in age among group participants of interest to us and, worse still, there will be age differences between the two groups of respondents (e.g., older users of one brand and younger users of the other brand – even if this is also suggested by quantitative usage data), it will be difficult to draw reliable conclusions from such a study since we will not know exactly if the differences observed by us are related to the brand usage or the age of the respondents. Likewise, corresponding to the logic of experimental research, too big an age difference between respondents or a disparity relative to this between the groups may constitute an uncontrolled variable distorting the picture of the results.

Despite age as a selection criterion being traditionally understood as metrical age, it shouldn't always be treated in this way. In consumer research, it is often the life stage of the person that is of far greater importance, that is, if they are married or single, whether they have children, and if their children are young, adolescents, or adults. Sometimes a 20-year-old woman will have more in common with a 35-year-old if they have both recently given birth, than two 30-year-olds one of which has three small children and the other one is single. This is why it's often worth asking several questions of a greater diagnostic power, like if the person is in a stable relationship, has children and how old are they, and whether or not they hold a job, etc., instead of focusing on the metrical age (Maison, 2014).

Box 5.9

In the case of qualitative research a much more useful selection criterion than metric age is the family lifecycle. Women with an age difference of 20 years but both in a similar life phase, for instance, single, no children, working in managerial positions in large corporations, spending their free time actively, may be much closer to each other than two women of the same age, where one of them is an unemployed mother of three small children, while the other is single, working from early morning to late evening, holding a high position.

When establishing the age selection criteria of participants, one thing to bear in mind is that the younger the respondents are, the smaller the age gap tolerance in the focus group is. Just as a 20-year age gap between respondents is still tolerated among adults (e.g., 30- and 50-year-olds in the same group), adolescents and children can stand a much narrower difference, where often 5 years can be a huge and intolerable age gap. This results from the tremendous pace of developmental changes taking place in children and adolescents. Because of this, having a focus group comprised of 12- and 16-year-olds (primary and secondary school pupils) is definitely not a good idea and, at the same time, if we want to acquire knowledge about children and adolescents, we should not draw any conclusions based on our conversations with 16-year-olds alone.

The situation where age is the differentiating criterion, when we want to grasp the difference between the views, behaviours, and opinions of younger and older persons, is another topic altogether. In this case, the best thing to do when developing the research schemata is to make the age groups extreme, thus, sharpening the potential differences observed, and have, for instance, a group of younger persons (20–30-year-olds) and older ones (50–60 years of age). However, we have to bear in mind that qualitative methods are not the best tool for observing differences between different demographic groups. Quantitative methodologies are much better for these purposes. Nevertheless, we can imagine a situation where this kind of research schemata would be desirable. One such example is a manufacturing firm whose products are mainly used by older persons (over 40 years of age) that is interested in brand repositioning in order to reach a younger target. Two groups can be selected in such circumstances: (a) older people (50–60 years of age) – existing users of the brand, to see how they

react to the planned communication, and (b) younger persons (25–35 years of age) – non-users of the brand but users of the category, to see how they will take to the new brand communication.

Income

In Western countries, one of the most important respondent selection criteria in qualitative marketing research is belonging to a specific social class. However, in countries where the class divide isn't sufficiently distinct, income is of greater importance. A person's earnings as a selection criterion is especially justified in the case of research on luxury and expensive goods (e.g., expensive cars) or premium brands usually chosen by persons with no financial constraints.

Unfortunately, income is a very difficult criterion and its ties with purchasing decisions are complex. Introducing income as a selection criterion in qualitative research is often difficult. First, people have a tendency to conceal or understate their income in many countries. Hence, if the financial resources of individuals are truly an important criterion for a given study (and they should, in addition, be high earners), an indirect manner of posing questions is worth introducing such as through their holdings: house/apartment, car, domestic appliances, or the manner in which they spend their money (eating out at restaurants on a regular basis, taking holidays abroad, etc., therefore, more behavioural criteria than demographic ones!). We must remember that the manner of diagnosing income can also be flawed (e.g., a person with a lot of money may not actually spend it). Nevertheless, adding indirect questions (e.g., about perception of financial situation) to explicit questions about income usually gives a truer picture of the financial situation of the respondent than asking about their earnings straight-out and, what's more important is that it gives a better understanding of the willingness to spend money.

Box 5.10

In qualitative research, income is definitely a criterion of much smaller importance than the motivational potential of spending a given amount of money on a specific product. And this kind of potential can be defined by the brands used to date and possibly the amounts which the respondent is willing to spend on products of a relevant category, much better than by income.

Another problem when considering income as a selection criterion is the manner in which questions are asked. It has to be clear to the person being recruited if the question concerns their own income or per capita income (which often makes a world of difference) and if it concerns the gross or net income. Even if this is clarified in the question, many people around the world aren't actually aware exactly how much they earn (especially gross income).

The last problem is the very legitimacy of a question about their income in qualitative research. I am aware the income question is traditionally taken into account in defining selection criteria for the qualitative study and this is usually because marketers

possess the quantitative data on the average income of given brand users and competitive brands. However, this "quantitative" thinking in qualitative research often turns out to be a treacherous trap. A statistical fact is one thing, but the motives behind an individual's brand selection decisions are another. That's why it is much more important to define the potential brand user (which is the objective of setting the respondent recruitment criteria for studies) in terms of behavioural variables, that is, for instance, through the use of other products of a specific price segment, than in terms of the earnings of a given person.

Let's imagine a situation where expensive premium ice cream is being introduced to the market which is meant to compete with the Magnum ice cream brand. If we want to recruit persons for the study that could be potential users for such a product and we define them by their income alone (and, of course, by the use of the relevant category, that is, ice cream eaters), it may well turn out that we will not have the right persons in the study. Although, on a statistical level, cheap products are usually consumed by lower-income earners and vice versa, this may not be the case on an individual level. A low-earning ice cream lover can also buy high-end ice creams (and possibly just limit how often they buy them), whereas a high-earning person may well buy the cheapest ice cream around because they attach little importance to this category and aren't keen on ice cream at all. It is also a well-known fact that students, despite their limited income, buy a lot of premium products (such as cosmetics). They reach for dearer products at the expense of restrictions in other categories whenever given categories are important for them.

The situation with durable and luxury goods (e.g., cars, expensive alcohols, flying business class) is somewhat different, as unit price is so high that low incomes present a real barrier to their use or ownership. This is when we truly have to exclude the persons with the lowest incomes from the study. Nevertheless, I do believe that it is not income that constitutes a predictor of the potential use of a brand but other variables, above all, behavioural ones relating to the use of a given category and the brands and variables linked to the needs and values of the consumer. For this reason, if I were going to recruit respondents for a study on a new brand of car with prices ranging from $30,000 to $40,000, I would put more emphasis on criteria like the car they already own and their readiness to spend a specific sum of money on a new car, and not on how much the respondent earns.

The situation with studies attempting to understand motives and barriers relating to specific brand use is similar. If we take our brand users for the study (to unearth the motives behind reaching for the brand) and the given person really is a user of the brand, we don't have to add the income criterion. If she's using it, then she's using it and that's that. When talking to the users of competing products, however, it is enough that this is a user of a rival product that is comparably priced to make the income criterion obsolete as their readiness to spend a specific amount of money on a product of a given category is clearly evident from their behaviour alone.

The attachment to income as a selection criterion and the overestimation of its role in qualitative research is also driven by the users of brands with a lower market share often justifying their non-use of brand leaders by the fact that they are too expensive (and clients, upon hearing this during interviews, often paying too much attention to it). As I mentioned earlier in Chapter 2, these are often post hoc rationalisations of unconscious negative emotions or result from failing to see the brand assets. It often appears that the consumer is unaware of exactly how much his/her brand costs compared to the competitive brand or whether or not there is a significant price difference between them, and the

real reason why the given product is not purchased by them is, in actual fact, failing to pinpoint the brand drivers or deterrents and not the actual price barrier itself.

Education

From a marketing point of view, education rarely is an important selection criterion in qualitative research because it is not this that determines the use or non-use of products or brands. Education (although being more of an intellectual potential) is of paramount importance to ensure the coherence of focus groups and the quality of the information gleaned throughout the qualitative research. Persons with different levels of education not only differ in terms of their experience but also in terms of their vocabulary, their manner of speaking, their worldview, and their self-expression. Therefore, in order to secure homogeneity, persons with the lowest and highest levels of education are not usually recruited to the same focus group. If, however, such persons should meet in one group, contact between them may be more strained and the group will probably have weaker dynamics. If such respondents do get put into the same group, this usually results in one of the parties withdrawing from taking active part in the interview. Sometimes it is the less educated individuals that are silenced, dominated by the erudition of the better educated group members, while at other times, it may be the more educated persons that back out upon realising that they have no conversation partners within the group.

If we set up a group based on clear similarities in predilections (e.g., Brazilian soap opera enthusiasts or regular fitness club goers), the level of education (and other demographic variables) selection criterion can often be omitted. Here, the coherence of the group is built on the preference, which is why the discrepancy between their level of education, similarly to other demographic characteristics, shouldn't disrupt the dynamics of the group.

Education as a selection criterion used in qualitative research can be taken into consideration in studies requiring multiple abstract thinking tasks, generalisation skills, and problem solving (e.g., studies on positioning concepts, pre-testing of advertising, and studies using complex projective techniques). Even if the target group for the studied product or advertising also includes people with basic schooling, it is best to invite persons with at least secondary education to these studies. As a general rule, persons with primary education often find these tasks quite challenging, which renders their participation of little use to marketers.

However, we shouldn't try to artificially eliminate people with less schooling from marketing research. If the product or problem so requires, such persons are, of course, very welcome to take part in the study. We must not forget, however, not to mix persons with diverse levels of education in focus groups and to always adjust the interview scenario to the intellectual capacities of the respondents in qualitative research, for instance, by avoiding too abstract and sophisticated vocabulary.

Additional rules for selecting respondents

Striving to homogeneity

The principle of homogeneity, that is, as little internal diversification of the study participants as possible, is particularly important in the case of focus groups

(Templeton, 1994). The internal consistency of the group is an essential condition underpinning many group processes because a group of people that recognise their similarities will interact with each other more rapidly (Forsyth, 1983). If the group members see themselves as a group of like-minded individuals, they will spend less time on describing, introducing themselves to the group, and on self-presentation which will, inevitably, give them more time to discuss the actual problem in question. The easiest way to arrive at group consistency is through the similarities between the participants in terms of their demographic characteristics. As mentioned earlier, this is not always sufficient or not always necessary in marketing research. Equally important, if not more important at times, are the similarities in experiences, social standing, and preferences (e.g., of certain product categories over others, supporting the same political party, reading the same magazines) – that is, psychological and behavioural variables.

Despite striving towards a group cohesion that is required for the appropriate group processes to take place, we also need to ensure a certain diversification of views and experiences. The study is meant to facilitate an exchange of information and sharing of the broadest possible spectrum of observations of the studied phenomenon. This is why typical consumer research involves working towards cohesion in terms of the characteristics that could influence the functioning of the group as a whole (demographic characteristics), whereas, when tackling diversification, this is done in terms of the factors impacting the diversity of opinions (e.g., different occupations held by the participants or the selection of persons who don't know each other).

Since recruitment is a crucial element of the study and experience shows that the wrong recruitment of respondents is often at the root of fatal flaws in qualitative research, research associations throughout the world are attempting to lay down some general guidelines for successful recruitment (Gordon & Langmaid, 1995). The codes of these associations – among others the QRCA and AQR[2] – incorporate many of the following successful recruitment suggestions:

- Ideally, participants should not have previously taken part in any marketing research; in practice, this restriction applies to a period of the last few months (depending on the research agency).
- The participants should not be familiar with the goals and object of the study (with only a general topic provided to them).
- The respondents shouldn't know each other beforehand.
- The participants should not be acquainted with the recruiters.

These points, despite being listed in most of the codes, are not essential requirements from the point of view of qualitative marketing research methodology. Nevertheless, their implementation as selection criteria is customary in most market research vendors (additional selection criteria linked to the study method – see Table 5.3), mostly to prevent cheating – which unfortunately is not uncommon among recruiters – consisting of inviting the same people to take part in the research time and time again or recruiting their friends to put some extra cash in their pocket. Even though, as we said, these criteria are not crucial for the methodology, they will be discussed in detail below, because they are customarily used in selection.

Can the study participants know each other?

Probably the most controversial of the mentioned additional respondent recruitment requirements is that the participants of focus groups should not know each other beforehand. For some clients, the discovery of the fact that focus group members know each other is almost a factor disqualifying the entire group. This is probably one of the most strictly followed recruitment requirements in the majority of recruitment firms. Is it really such a critical criterion and to what extent does it have a bearing on interview success? It turns out that this is not required from the methodological point of view (despite what some people may believe). The problem is not whether the people know each other but the power imbalance in the group stemming from the fact that some respondents know each other and others do not. Persons that are acquainted with each other straight away have a stronger position in the group because they give each other the support and courage to voice their opinions in what undoubtedly is a difficult situation for everyone. On the other hand, respondents that do not know each other are more inclined to explain what they are feeling with greater precision and thoroughness. Conversely, those that already know each other have the tendency to skim the surface of the topic, use shortcuts and simplifications, and may leave many aspects understated.

The support that already acquainted persons give each other in a group of strangers can sometimes be harnessed as a tool facilitating group dynamics. Sometimes – especially with difficult and sensitive topics – people that already know each other are especially invited to give the group participants some encouragement. What's important then, is for the group to be made up entirely of pairs of people that knew each other beforehand and for there not to be a single participant that doesn't know anyone (see affinity groups – cf. Chapter 3).

This requirement of the respondents not knowing each other should not be treated too rigorously. If we are conducting interviews in a village or a small town and the participants are recruited from this place only, it would be very difficult to find respondents that don't know anyone in the group. The same applies to specific professional groups (e.g., doctors with rare fields of specialisation). It would be futile searching for persons that don't know each other and, in fact, there is no need to do so, as this setting in no way impedes the conduct of a group interview. It may, however, pose a greater challenge for the moderator who has to pay particular attention so that the respondents will not stray from the topic and talk about their problems and difficulties, paying little or no attention to the moderator and the meeting objective.

Professionals: links with the research topic

In ordinary consumer research, not interviews with professionals, apart from the already mentioned basic recruitment principles, the requirement that professionals who are experts in a particular field of research are excluded from the study is traditionally added to this list (so-called security questions, Mariampolski, 2001). For example, one would not invite hairdressers, stylists, or beauty store shop assistants to take part in research on shampoos alongside ordinary users, and, when conducting automotive research – taxi drivers or car repair workshop mechanics. This is because of their normally far greater knowledge of the problem than that of typical consumers,

hence, the criteria which they adhere to when choosing between brands and products are often very different from those applied by ordinary users.

Research agency, marketing, and advertising agency staff are also, as a rule, usually excluded from consumer research so that their professional ties with research, consumer products, or advertising do not affect their responses. Another reason why they are precluded from taking part in the research is the confidentiality accompanying most consumer research. This reduces the likelihood of staff coming from rival companies or persons working for the competition taking part in the research.

Avoiding "professional" respondents

The selection criteria of most companies include the recommendation that persons who recently took part in marketing research, especially ones that participated in a study on the same topic, should be excluded from the study (Mariampolski, 2001). The period of exclusion from research is determined individually by each research vendor (usually ranging from three to six months before the study). The rule of inviting "fresh" participants aims to prevent the enrolment of "professional respondents" (use of the same respondents time and time again). It must be said, however, that studies on the methodology of qualitative research show that persons that have already taken part in at least one study make more productive respondents than first-time study participants (Gordon & Langmaid, 1995). Taking part in qualitative research for the first time is always stressful for every respondent because they simply have no idea what to expect. Some people may also find talking to strangers stressful enough. Those that have already taken part in a study already know what to expect and are more at ease, open, and function better in a group, establishing a rapport with the moderator. Hence, prior participation in marketing research also fails to pose any issues. Nevertheless, it is extremely important for such persons not to be guided solely by making some easy money and for them to meet the set selection criteria.

Box 5.11

Money is an important motivating factor to attend the qualitative research as well as compensation for the respondent's time given to the study. However, aside from money, it's also extremely important to instil in to the respondent's inner motivation, that her/his opinions are very important and highly significant. When it comes to the effectiveness of the recruitment process, it turns out that the higher a person's income and the senior the position held by them, the less important the financial reward is, and the more significant is the inner motivation of the participants.

No criteria: a product for everyone

When defining the selection criteria for qualitative study, researchers must be very wary of the client not wanting to impose any criteria whatsoever, usually justifying this by claiming that their product is "universal". Regardless of whether or not "one product for all" has any place in marketing, studies with "anybody whatsoever" do

not produce the desired results and, most of all, not everyone – even if they are a potential user of the product – is an equally good source of information, in other words, a good respondent. I personally advocate imposing selection criteria in terms of "from whom can we get the most relevant information about a given topic". Therefore, as already mentioned earlier, I rather avoid persons with basic schooling for relatively abstract topics like testing advertising or positioning concepts and studies involving many complex projective techniques, sometimes even if the product is also intended for this specific group of persons.

Box 5.12

The more precise and more fitting to the research goals the selection criteria are, the greater the chance that the study will lead to obtaining the sought-after information. Unfortunately, in many marketing research cases, there are a great many difficulties in determining the purposive criteria and it may sometimes turn out that the selection criteria were formulated badly, and the researcher talked to the wrong people.

Study site location

The key issue of study site location, which the number of groups is also dependent on, has not yet been addressed in the considerations about research planning and participant selection criteria. Many research vendors offer to conduct most studies in two locations, often without giving any consideration to the reason why specific cities were chosen, why so many sites were selected, and whether all of this really is necessary. Running qualitative research in different sites has two underlying objectives: (a) preventing possible bias (differences) resulting from the location where the measurements were taken (called the location bias); (b) monitoring the expected differences between specific fields.

In the first case, when we are after excluding possible measurement errors, the study is usually conducted in two locations only. Interviews conducted in the second location are carried out "just in case", to observe and eliminate the risk of a false portrayal of the results due to the specificity of the first city. In this case, there is no difference in which order the cities are put, which is why this choice can, without any qualms, be based on convenience only (e.g., the location can be conveniently reached, it provides comfortable focus group facilities and a reliable recruiter is available there).

When deciding about the number and the location of focus groups, one thing worth considering is whether more than one location is absolutely necessary. Sometimes, when the studied product or its advertising are typically at the metropolitan level, there may be many more critical criteria determining the differentiation of the groups and their number than the location where the study is conducted.

The situation is different when the location is significant in collecting the information required about consumer behaviour differences, shopping habits, or reactions to advertising. Then, the location is carefully pinpointed in line with the criteria of interest to us, for instance, a small town and a large city. Later, a specific town/city has to be singled out that would, in our opinion, best represent the given category.

Different study locations are imperative whenever we expect to find significant differences between regions. Such differences are to be expected when investigating culinary differences or the way global brands are perceived in different regions within the country by local brand users. However, it has to be said that when dealing with advertising issues and consumer behaviour research, varied locations are not common because brands are becoming increasingly more global. Geographical diversity is needed more frequently in political and social research where the qualitative differences between regions are much more distinct.

The differentiation of locations to capture the differences between study sites can lead into a certain methodological and logical trap. Let's assume that we want to find out the extent to which female consumers differ from each other between small towns and the city, and interviews will be conducted in both locations with this goal underpinning the research. Unfortunately, even if the results do reveal certain differences, we can never be sure of their root cause. Is it because the persons taking part in the interviews are truly very typical of the given town (or perhaps they have just moved to this town or have lived there for a long time but are atypical)? A particularly difficult interpretive situation relating to the regional differences occurs when only one group with a specific type of respondents is conducted in a given location (e.g., a focus group interview with users of brand A in one city and with users of brand B in another). Then, even if we find differences between the results obtained in both locations, we can never be certain whether or not they stemmed from other potentially influential factors (e.g., being a user of brand A or B).

Number and type of interviews: final design of research schemata

We have finally come to one of the toughest decisions in research planning of how many interviews (individual or group interviews) should actually be conducted. This has consequences for the study costs that the client has to cover, the turnaround time, and the quality of the research outcomes.

Unfortunately, there are no clear rules as to exactly how many qualitative interviews should be carried out. The final decision almost always is a compromise between the ideal, where we investigate everything we need to know in a given situation, and the financial capacity and time constraints (Thomas, MacMillan, McColl, Hale, & Bond, 1995). Research planning involves decisions as to what kind of respondent groups we want to conduct interviews with and what kind of respondents we don't want in our group so that the final number of interviews is optimal in terms of the cost-to-quality ratio.

Box 5.13

When planning qualitative research we shouldn't be guided by the number of respondents but rather by the number of interviews. From the point of view of the reliability of the results, we are more entitled to carry out six individual interviews (and this kind of study often makes sense) than one group interview with six respondents (as the repeatability of results cannot be observed here in isolation from the potential for conformity or single-respondent domination taking place within the group).

A basic principle to always keep in mind when planning any, even the simplest qualitative research, is that a certain minimum number of interviews have to be conducted in order for meaningful conclusions to be drawn (Mukhopadhyay & Gupta, 2014). Due to the principle of repeatability of the results, every qualitative study should encompass at least several interviews. Research comprising of one focus group or two to three individual interviews should not be conducted as we risk obtaining results that are purely coincidental. This does not mean that a study based on one group interview only or three individual interviews will always provide wrong results but the interpretation of findings involves a much greater risk since we can never entirely be sure whether the results truly reflect typical views on particular issues or only give across the specificity of a given group or even of an individual respondent (Morgan & Scannell, 1998). One of the dangers associated with running only one focus group interview is that the results cannot be compared between interviews, preventing repeating patterns being identified in responses. If, however, we carry out two or three groups with identical criteria and we manage to obtain a similar depiction of the results for subsequent interviews, we can exclude the hypothesis that the results obtained are incidental. We are always looking for a repetitive pattern of responses and this can only be ensured by running several interviews (Webb & Kevern, 2001). From the point of view of the reliability of the results, we are more entitled to carry out six individual interviews (and this size of study often makes sense) than one focus group interview with six respondents, even though the number of respondents encountered in the research is the same. However, in the case of group interviews, repeatability of results cannot be observed in isolation from the potential for mutual influence of respondents by each other.

Bearing in mind this principle, we can assume that in the case of simple research problems (e.g., appraisal of a new advertisement design) with uniformly defined selection criteria (e.g., working women with 3–6-year-old children), it is enough, in principle, to conduct a study underpinned by two focus groups with the same composition or 4–6 individual interviews. In practice, however, such minimalistic schemata are rarely used. In order to reduce the risk of drawing the wrong conclusions from the research (which may turn out to be very expensive in the marketing context), the number of interviews should be increased. That is why, in marketing practice, the smallest qualitative research usually involves four focus groups, six dyads, and eight individual interviews.

If, however, the research questions are more complex, which tends to be the rule in most marketing research, and the research goal is, for instance, penetrating the differences between different groups in terms of the marketing problem (e.g., our product users' perception of a new commercial vs. the impressions made on competing product users) or we are interested in people with different characteristics (demographic, social), which differ so much that they cannot take part in the study together (e.g., because of the large age gap), we should increase the number of interviews so that, ultimately, there will at least be two interviews in one cell of the research schema.

Box 5.14

Regrettably, there are no hard and fast rules as to exactly how many qualitative interviews should be carried out. The final decision almost always is a compromise between the ideal (where all respondent groups that should be penetrated in a given setting are investigated) and the financial capacity and time constraints.

It is important to remember that when planning qualitative research – contrary to quantitative surveys – we should not be guided by the number of respondents but rather by the number of interviews. The number of respondents – whether 20 or 30 persons – taking part in the study is less important for the quality of the findings than how many groups there will be in the research schemata (cells) and how many interviews will be carried out in each cell of research schemata. Also in this case, the thinking underpinning the planning of qualitative research is similar to the logic of experimental research where the number of respondents is directly related to the experimental research schemata and the number of persons in each study condition, while the experimental schemata follows directly from the number of differentiating variables (e.g., being a user or non-user of a given brand, being a loyal user vs. a switcher).

Another argument in favour of distinguishing separate groups (cells) in the research schemata is when the research objective is to observe the differences between certain types of behaviours (behavioural variables). Then, separate types of behaviour (resulting from the research goals) become the sampling criteria placing the relevant participants in the given groups. A typical example of this is conducting studies with the users of a specific brand and the users of rival brands separately, or with the current and former users of a brand, product category, or service, or individually with persons that currently have relevant experiences and others that had these experiences in the past (e.g., current and former smokers).

If the research problem is complex and little known, determining the number of groups and their appropriate composition may turn out to be quite a challenge, which should first be approached by considering which characteristics can be linked to the problem in question and which of them could influence the differences in functioning in a given area. For instance, when studying petrol station users we would have to examine which characteristics could determine a different style of use of petrol stations: the type of car owned (passenger or goods vehicle), the nature of the ownership (private or company), the engine type (diesel, petrol, or electric). In the case of very complicated research problems, there may be many differentiating features, which is why the next step should be to make sure that the research schemata is not too large, which involves cutting down the long list of criteria to only a handful of the most important ones. What would then be of interest to us is assaying which category is of sufficient interest to us to constitute a separate research schemata cell where a separate interview (group or individual) will be conducted. One thing to always bear in mind when planning qualitative research is that we are not dealing with quantitative research on a representative sample and the aim is not to talk to all the types of potential recipients of the product or advertisement. Only the groups of greatest interest to us in light of the research problem, thus, the groups which are going to provide us with the greatest amount of relevant information, are selected.

Doubts concerning the composition of the group and the number of respondents may also arise when the objective of the research is picking up on differences in opinions or behaviours between two distinctly different groups of persons (e.g., users of cheap vs. expensive washing powders, users of our product vs. users of competition, or category users vs. non-users). Some, wanting to explore the differences in opinions about a given topic between various groups of people, conduct mixed groups. In principle, such a group is meant to lead to a confrontation of views and a more dynamic exchange of opinions but in practice, it falls short of these goals. I personally think that when the aim is to ascertain the differences between radically different groups of

persons, putting the participants in one focus group is not recommended. First of all, in this case, the underlying problem is that later, on the level of analysis, the researcher is often at a loss as to which opinion was produced by whom (the material used to write up the results usually doesn't list the authors of relevant statements). The second, much more important reason, is the natural – inherent in group processes – averaging of opinions within the group (cf. Chapter 3 – confrontation groups).

As can be seen, there are no distinct rules concerning how many groups should be incorporated into qualitative research. The number of groups depends largely on the diversity of the population of interest to us from which the respondents are selected. If the population of interest to us is rather homogenous, the research could be comprised of a smaller number of groups (interviews). If, however, we are looking for a more diverse population and we expect to find significant internal differences across the sub-groups, the study requires more differing groups in terms of their selection criteria.

Deciding about the number of groups to be held in qualitative research and about the respondent selection criteria is a constant search for the answer to the following questions:

1 Is that group (persons with specific characteristics) important from the marketing perspective?
2 How broad a spectrum of characteristics should be taken into consideration in the study to have control over preference diversity (e.g., persons aged between 20 and 60, or is the 30–50-year-old range sufficient)?
3 Can persons with mixed characteristics be combined in one group or will this distort group homogeneity (e.g., women and men, older and younger persons, persons with children and persons without)?
4 If there is a suspicion that homogeneity can be distorted, should additional groups be introduced or should the spectrum of observations be narrowed down (e.g., two groups with women and two with men, or only two groups with women; interviews in cities or medium or small towns, or only in cities)?

There are many more questions of this kind and how many of them arise and how many should be answered when designing research schemata all depends on the specific research problem and its complexity. At this point, I would like to emphasise that the responsibility for the decision concerning the composition and the number of groups not only rests on the research agency but is often made together with the client and based on the knowledge supplied by the client (e.g., about the market situation), which the marketing researcher usually lacks. If the research problem is very complex and the researcher isn't capable of deciding on the final number and composition of the groups in research schemata on his/her own, they can prepare two options for the client to consider (e.g., a less and more complex version). In this case, it is crucial to clearly emphasise the pros and cons of each approach.

In qualitative marketing research, as accentuated earlier, one should avoid overly complex schemas and too many interviews in the study (as this is not quantitative research!). My experience shows that most standard qualitative marketing research have schema based on 6–8 focus groups or 8–12 in-depth interviews, which, by all means, is sufficient. However, there are situations where a more multiform research schemata may be required and, in extreme cases, include even as many as 20 or so groups and individual interviews.

An example of a research problem where qualitative research comprising several dozen interviews may be called for is a qualitative deepening of a quantitative segmentation study (Maison, 2014). In this case, if we want get more insight into selected segments (e.g., in terms of the motives, needs, and values), at least several interviews have to be run in each segment. Let's say there are 7 segments to penetrate with a mere 6 in-depth interviews being conducted in each of them, all in all, the research schemata will take the tally to 42 interviews.

Most common mistakes in planning research schemata

An abundance of mistakes may be made at the study preparation phase that may later lead to a deterioration in quality of the results obtained. Sometimes, the responsibility for these mistakes rests solely with the research agency (e.g., inappropriate recruitment criteria), while at other times, it may result from the client failing to provide the researcher with the necessary information (Tuval-Mashiach, 2017). The most common mistakes that are made during the research planning process are detailed as follows.

Inappropriate selection of respondents

Inappropriate selection of study participants may concern two aspects: on a general level, which is not linked to the specific subject of the study, and on a specific level, connected with the objectives of the study. Being the wrong respondent in the general sense mainly boils down to being a "professional respondent", that is, someone who is regularly involved in various marketing research. An inappropriate selection of participants relative to the research subject occurs when the participants lack the knowledge required to discuss a given issue (e.g., because they don't use the product in question and this is what is precisely of interest for the study). Unfortunately, these mistakes do happen in qualitative research and – apart from evident scams – usually because of the vagueness of the problem definition and too general selection criteria. Imagine that we want to introduce a new fuel dispenser model at self-service petrol stations that have been specially designed for women (light, with a comfort-grip nozzle, etc.). In the planned research, we want to find out what improvements should be introduced to standard fuel dispensers to make them more user-friendly for women, hence, we have invited active female drivers to take part in the study. However, during the study course, it turns out that none of the recruited female drivers actually fill up their cars on their own (and have never done so!), because their husbands always do this for them. In this situation, the results obtained will not be very useful because of their limited experience with fuelling, preventing them from talking about what they didn't like about it. A group comprised of women that do fill up their cars on their own but fail to see any problems with this would also be of little use. If the selection criteria would be extended to include two more factors: (a) women filling up their car on their own (at least from time to time), and (b) a sense of reluctance about it, the efficacy of the interview and the quality of the research finding would probably increase.

Inappropriate number of interviews

Researchers or clients commissioning group or individual interview studies sometimes forget that this is a qualitative method and, no matter what we do, will not furnish

representative data in a statistical sense based on which we could later make inferences on the intensity of given phenomena in the population. Some, however, treat this characteristic of qualitative research as a defect and try to compensate for it by introducing too large a number of interviews than is actually required by the relevant research problem. They may try, for instance, to run separate interviews with each target group of potential interest. A reversal of this phenomenon – usually resulting from financial constraints – is where the number of groups are reduced to a minimum when the study actually requires a more substantial research schemata. One example of this could be a study concerning product modification to attract new consumers (competitive brand users) where it should be conducted on both current and potential product users but is actually limited only to the users of competitive brands. Failing to conduct interviews with current users may actually lead to losing existing customers at the expense of soliciting new ones.

Improper location

A consequence of the already mentioned drive to obtain "representative" qualitative research is the tendency to carry it out in too many locations. Organising studies in one or two different locations is usually sufficient in the study of most marketing research problems. Increasing the number of groups by adding new locations is worthwhile only if significant differences in attitudes or behaviours are expected between various regions and, on top of that, they are important for us from a marketing perspective (e.g., if we figure that the inhabitants of small towns will have completely different reactions compared to those living in big cities and both groups are equally important for us – however, as was earlier explained, even then their inclusion in the qualitative research schemata is questionable). Another mistake is increasing the number of locations just out of curiosity. We must not forget that the performance of qualitative research in two different cities will not allow us to draw conclusions on the differences between these city dwellers (cf. Chapter 8, Principles of qualitative data analysis), since we can never be sure how typical a representative of a given region these respondents are.

Box 5.15

CASE 5.1 Introducing a new "people" magazine on a saturated market: complex qualitative research schemata to diagnose problems from different perspectives

In 2011, Edipresse Poland, one of the largest international publishers of women's magazines, a few years after successfully introducing a new celebrity news magazine called *Party* on the Polish market, decided to bring another title to the market from the same category ("people" magazine category). The publisher faced two main challenges: 1) the market for celebrity news magazines was already saturated, with several powerful titles dominating the category, and 2) the readership of traditional paper magazines was continuously decreasing across the entire category as many readers "moved" to the internet.

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A two-year, and very complex, research project using various methodologies (quantitative and qualitative) was conducted, delivering valuable insights for the publisher, allowing them to create and introduce a highly successful new "people" magazine called *Flesz*. The research project consisted of the following steps and methods:

- **Finding the directions.** The starting point was four focus group interviews with experts (e.g., journalists) to find the right directions for the new magazine.
- **Exploring segments to identify the target group.** The second stage was a need-based quantitative segmentation study among women's magazine readers, conducted on a representative sample of 600 participants. The study delivered information about reading habits and attitudes towards different magazines, allowing five different segments of women's magazines readers to be singled out.
- **In-depth segment exploration.** In order to understand the specific needs and barriers towards the product category, nine focus group interviews were conducted with three selected segments of biggest potential for the new product. New magazine concepts were also tested in each segment during the interviews.
- **Product concept test.** Twenty dyads were conducted with two respondents (two readers of different competing titles and a moderator) to test the prototype of the magazine (mock-up).
- **Final product and communication test.** Twenty-four dyads were conducted among potential target groups to evaluate the impact of different aspects of the magazine (e.g., its layout, content, and title) and to create the final product. The communication strategy for a new title was also tested. The interviews were conducted in different locations throughout Poland (cities varying in size).
- **Post-launch test.** Three months after the magazine was launched, a qualitative study (seven focus group interviews) was conducted to understand how the new magazine was perceived, its position among competitors, as well as its purchase motivators and barriers.

As a result of these research projects, we found that there still is an unoccupied group of readers in Poland with an "approach-avoidance" motivational conflict, who liked gossip, were interested in the lives of celebrities, and wanted to read about them, but at the same time denied this need and were ashamed of reading traditional "gossip rags". *Flesz* (meaning "Flash") magazine was created precisely for them, catering for their needs (to read celebrity news) and factoring in their barriers (not wanting to admit to enjoying a bit of gossip). It was positioned as a "celebrity fashion and style" magazine. In fact, the only difference was its positioning, not so much its content. This communication strategy enabled *Flesz* to reach completely new readers who were previously not catered for on the Polish market. The remarkable market success of the

magazine exceeded publisher expectations – the first issue, which appeared on the market in 2011, sold more than half a million copies (the highest sell in the category), and the next issues kept this trend up, selling about 300,000 copies. Most importantly, the launch of *Flesz*, due to appropriately matched communication and content, met reader needs perfectly and did not affect the sales of other titles in the category from Edipresse Poland's portfolio (the *Party* and *Viva* titles).

Source: Maison&Partners and Edipresse Poland

Exercise 5.1

Overview of the situation

A Dutch network of old people's homes has decided to enter into other markets. The company offers very high quality, round-the-clock care, single rooms fitted with televisions and en-suite bathrooms, full board, and 24/7 nursing and medical care. It is planning to offer a monthly care package in such a home at the level of the average national income in a given country. The aim of the research is to get a grasp of how this offer is being perceived and to whom and how it should be communicated (who should the target group be for the offering and the communication). At this stage, the company can still introduce many modifications both in its offering as well as in its communication.

Task

Plan a schema of a qualitative study preceding this company's entry into a new market. Answering the following questions will help you prepare the study schemata and put it down on paper:

- Respondent definition – with whom should we be doing the interviews?
- Study schemata – with what groups of people should the interviews be conducted and what qualitative methods should be applied in the case of each group?
- Number of interviews – how many interviews and in what respondent groups should they be carried out?
- Location – where should the interviews be conducted (how many and what kind of locations)?

Exercise 5.2

Go back to the previous task and define the selection criteria (with their operationalisation) that will be taken into account by the recruiter when looking for people for each of the respondent groups in this study defined by you. Create a selection questionnaire for a minimum of two respondent categories defined by you e.g., (a) future nursing home residents, (b) present carers.

Notes

1 A request for a proposal is made by the marketing department of a firm (client) and directed to the research agency, asking them to prepare an offering detailing the method, schemata, turnaround time, and the price of the research.
2 QRCA (Qualitative Research Consultants Association) – in the US, and AQR (Association for Qualitative Research) – in the UK.

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6 Step 2: discussion guide
The art of asking the right questions

Elementary rules for a good discussion guide

The recruitment stage is also the time for the qualitative researcher to prepare the script and additional study materials (projective and enabling techniques or tested products). The interview guide is a plan that specifies the main topics that should be discussed during the interview along with the time frame to be allocated to each topic in the discussion.

The discussion guide is usually prepared by the moderator or another person responsible for the study on the basis of the information provided by the client. A prerequisite to a well-prepared guide are precisely defined research goals and their thorough understanding by the researcher. There are no universal guides that can automatically be copied from study to study. Each and every research situation is different, which is why every guide should be best fitting to each research problem and its specific characteristics (Levitt *et al.*, 2018; Levitt, Motulsky, Wertz, Morrow, & Ponterotto, 2017; Osbeck, 2014; Rennie, 2012).

Box 6.1

There are no universal discussion guides that can automatically be copied from study to study. Each and every research situation is different, which is why each guide should be best fitting to each research problem and its specific characteristics.

An interview guide developed by a moderator (qualitative researcher) should then be consulted with and approved by the client. Researchers should not perceive it as a form of control but as an essential verification of the fact that both parties understand each other well and that the moderator understands the research objectives well. Of course, some friction and misunderstandings may also appear at this stage, which often boil down to lack of experience on either side and – more likely – from their different approaches to qualitative research. A frequent mistake made by researchers is preparing the topic guide only in view of the course of the discussion without including any additional information on the various discussion area goals or the tasks (and their purpose) to be carried out by respondents. If the scenario includes such clarifying information then this will undoubtedly help the client understand the motives and intention of the researcher.

A common mistake of clients is being overly focused on the specific questions that are going to be posed by the moderator, in other words, thinking in terms of the

questions and not the topics or areas for discussion. The questions formulated by the client with the expectation that they will be put to the study are often research questions linked to the marketing goal but not the actual ones or in the form in which they should be included in the guide. Examples of such questions are: "Why isn't the respondent buying my product?", "What influenced their decision to buy this brand of car?", "Will the respondent buy this product if it is placed on the market?" Respondents usually find it very difficult to answer these kinds of questions. It is, of course, fully understandable that the client wants to find this information out. This is also why they can expect to get answers to these questions after the study, in the final report, but not during the interview itself nor directly from the respondent. Putting such questions directly to respondents does not usually lead to a greater understanding of the marketing problem; on the contrary, it may show a distorted picture of the situation. The problem is that the respondents are unconscious of many of the processes to which these questions refer. Hence, the answers given by them may well reflect the post-rationalisation of unconscious emotions and attitudes (cf. Chapter 2). The answers to these questions are gleaned through the analysis of the many statements and results of projective and enabling tasks (see Chapter 4).

Box 6.2

What is called a "qualitative interview" is not always true qualitative research. The structure of a true qualitative interview (both individual and group) should be in-depth but relatively casual where the wording of specific questions and their sequence is less important than gleaning specific information, irrespective of what questions will be posed in order to obtain this information. The task of a good qualitative researcher is not to ask specific questions but to understand the underlying problem and find the answers to the questions which help to solve the problem.

Clients with extensive experience (especially if they had earlier worked in research agencies) sometimes prepare their discussion guides themselves. Whoever creates the first version of the discussion guide (the client, a researcher different to the moderator, or the moderator him/herself), the final version used to conduct the interview should be fine-tuned by the moderator to ensure that they are comfortable with it and have a thorough understanding of the aims of the questions that will be addressed (discussion areas). Hence, even if the topic guide is provided by the client, it's always worth putting it to the moderator so that the final version can be prepared by the moderator in a form which they are most used to and comfortable with (also in terms of its graphic layout). It is also important to remember that an interview guide is not a survey questionnaire requiring the same questions to be posed in an unchanged manner. The guide merely sets the direction of the discussion; what is more important than phrasing specific questions, is for the interviewer to never lose sight of the research goals and the problems that are going to be discussed (Gergen, 2014; Gergen, Josselson, & Freeman, 2015). If the interviewer has the specific question in his/her mind, they will not have any problems with altering it appropriately and asking respondents in a different way to unearth the desired information when they see that the original question was badly phrased,

unclear, and difficult to grasp for the respondents and will not lead to the intended objective. If, however, they understand the goals underpinning each question in the guide, they can rephrase it or exchange it with a different one in order to reach the goal.

Some clients (fortunately this doesn't happen that often) do not disclose their real research goals but merely provide a question set, expecting the moderator to put them to the respondents literally. In this situation, a quantitative study is more fitting because such a rigid, questionnaire-like discussion guide can never lead to in-depth qualitative outcomes. Focusing on the wording of the questions and not on the research goals disrupts the dynamics of the group and distracts the moderator's attention away from listening to the respondents, leading to the interview being relatively superficial and failing to unearth the information that the client is interested in.

Box 6.3

If a moderator focuses on the wording of the questions and not on the research goals, the dynamic of the interview is disrupted, leading to the interview being quite superficial and the conversation not being capable of unearthing the information that the client is after.

From research questions to the discussion guide (interview scenario)

A discussion guide should never contain too many questions. If it has an overabundance of pre-defined questions, the moderator will inadvertently concentrate on identifying the questions which are yet to be posed and, as a consequence, will not listen to the respondents carefully enough. If, however, the guide consists of a bulleted list of discussion topics, a quick glance suffices to identify what remains to be addressed (Creswell, 2013). There really is no need for the questions to be written out word for word (Mariampolski, 2001), on the contrary, this could be a stumbling block to the moderator, pulling their attention away from the actual discussion. If the moderator knows exactly what they want to find out and is in tune with the respondents, they will most definitely be capable of coming up with a strategy as to which questions should be asked and when. However, the generation of as many questions as possible when discussing a specific topic could prove to be an excellent exercise for less experienced moderators. This kind of exercise helps in becoming accustomed to the research topic and identifying different approaches that can be taken. Nevertheless, I would also recommend that beginning interviewers use topic-focused interview guides from the very start.

Box 6.4

A qualitative research discussion guide isn't a survey questionnaire requiring the same questions to be posed to each respondent in an unchanged manner. A script merely sets the direction in which the discussion is heading. This is why it should be focused on the research goals and discussed problems, rather than on phrasing specific questions.

Interview guides do not have the same function and structure in every qualitative study (see Table 6.1). Their structure is largely dependent on the moderator's experience, the client's requirements, and the type of study being conducted (e.g., focus group interviews vs. ethnography). An experienced moderator who is cognisant in the research problem may rarely need an actual discussion guide, and, if they do use one, it is only as a support and not as a strict list of interview guidelines. The significance of a topic guide also changes throughout the course of the study. In a sense, the moderator is actually "learning" the guide from interview to interview and, after several discussions, can manage perfectly well without one.

A more detailed discussion guide with sample questions would be required if many moderators were involved in the study (various interviews conducted by different people) and in international research projects (analogously). This helps avoid misunderstandings and measurement errors stemming from questions being asked too differently.

Interview time planning and number of discussion topics

Some moderators also have a time plan for their topic guide (how much time in minutes is envisaged for each topic). I personally think that time planning is highly useful in interviews and has two basic objectives. First, it has the function of a communication tool with the client. The time allocated to discussing particular topics in the guide reveals what the moderator or client consider to be more important in the planned interview or less so, what they want to spend more time discussing, and what should be given less time. The time frame also helps to streamline the interview process. If 10 minutes have been planned for a given topic and the discussion has exceeded this time frame, we know that we should swiftly move on to the next topic. However, time frames are only there to guide the interviewer and it may turn out during an interview that he/she will have to adjust them. If a discussion of a certain

Table 6.1 Factors influencing the structure of the interview guide

	Less structured interview guide	*More structured interview guide*
Moderator's experience	More experienced moderator	Less experienced moderator
No. of moderators involved in the project	One moderator also operating as the qualitative researcher in charge of the study	Several moderators International research (i.e., several moderators) Different persons preparing the guide and performing the moderation
Combined experience of moderator and client	Very experienced	Inexperienced; first project together
Research topic/area	Research underpinned by understanding the problem (e.g., testing advertising concepts)	Research aimed at obtaining specific information (e.g., preceding the construction of a large survey)

topic, despite being longer than envisaged, still brings lots of interesting insights connected with the research goal then this is a signal that certain fine-tuning of the guide and the time frame is called for there and then. Nevertheless, such decisions should be made in view of the whole study since extending the time spent on one topic cannot be at the expense of another, equally important issue in the research or the interview dragging on.

Box 6.5

Characteristics of a good discussion guide for qualitative research

- A rough outline of the discussion threads.
- Problem-based, without detailing specific questions.
- Fixed time frames for specific topics.
- Short and easy to memorise.
- User-friendly and clear layout (bold type, underlining, colour-coded formatting – whatever works best for the interviewer).

When planning a focus group interview, it is important to remember that discussions with 6–8 persons lasting 1.5–2 hours allow 4–5 topics to be penetrated. Should we attempt to examine more topics during this time, we are risking collecting superficial information. A dyad or individual interview allows slightly more topics to be covered in a more in-depth way compared to a group interview. However, we should always be wary so as not to introduce too many topics, especially ones that are not very related to each other, into one study (and one interview guide). The client may sometimes request more questions to be incorporated into the topic guide, which is, of course, understandable, since they want to make maximal use of the research situation. However, giving in to such pressure on the part of the interviewer may inadvertently lead to straying too far from the research objectives and to losing the in-depth character of the interview.

At this point, it is worth pointing out that interviews conducted on the basis of the same interview guide may vary considerably in terms of their duration (see Table 6.2). There may be many different reasons for this. First, it depends on the respondents themselves, most of all, on how talkative they are. Some people can discuss things more freely and like talking about themselves – they are simply more outspoken. Interviews with these kinds of people usually last longer than with quiet and reticent individuals who often use sentence fragments and from whom almost every answer has to be patiently drawn out. This "talkativeness" is not just a characteristic of individual persons but also of groups. There are more and less talkative groups with the discussion being conducted more or less freely. This is often connected with the dynamics of the group. The duration of group interviews may also depend on the homogeneity of the group. Heterogeneous groups in terms of experiences and their approach to the topic usually last longer because of the broader spectrum of opinions.

Box 6.6

A good discussion guide should not only take the course of the conversation into account, but should also explain the aim of the specific areas of the discussion and the tasks performed. A good discussion guide should also include the amount of time planned for each topic. This is very important for the communication between the researcher and the client, who has a better understanding of why relevant questions are asked, why specific tasks are executed, and the importance of each topic.

The interview duration also depends on the insightfulness of the moderator. A qualitative interview facilitated by a skilled and experienced moderator who asks a lot of questions and digs deep to unearth deep-seated drivers will last longer than if conducted by a rookie not especially adept in the craft, who barely skims the surface of topics. Such diligence in getting to the essence of a problem is a very desirable quality (cf. Chapter 7), which should, however, be distinguished from a long interview but one which is off topic, which simply means that the moderator is not doing a good job of guiding the discussion.

Third, the length of the interview also depends on which interview it is in the research process. The first interview is always longer as everything needs probing and the asking of follow-up questions is needed in order to become more familiarised with the subject, get underneath people's responses, and fully understand and deepen the topic. Many areas are clarified and sufficiently penetrated during the course of subsequent interviews so that they can be treated a little more sketchily, without having to get every respondent to expand their statements; hence, the duration of following interviews is naturally shortened. We must be wary, however, not to fall into the trap of taking a too cursory, routine approach to the last of the interviews because of the moderator's sense of him/her knowing and understanding everything there is about the topic. Even if the moderator has this impression, it's best not to shorten the time of successive interviews mainly because the repeatability of data in the statements of subsequent respondents is an indication of the reliability of the results (cf. Chapter 8). In addition, sometimes the interviews that follow are observed by different persons representing the client and seeing such a "shortened" interview could produce a misleading picture of the results. Conducting interviews in two moderator teams helps avoid such traps of an overly routine and perfunctory treatment of the next interviews in the research process.

Order of the topics

When developing the interview guide, one should consider what the logical sequence of relevant problems is and introduce the topics into the discussion in line with this logic. If the guide is logical, there will be a seamless transition between the topics. With a well-thought-out discussion guide, the next topic on the guide may spontaneously appear in the discussion just as the moderator was about to move on to it.

Table 6.2 Factors affecting the duration of qualitative research (cf. Chapter 7)

	Lengthened interviews	*Shortened interviews*
Moderator specificity	A **probing** moderator, proactively deepening the interview	A moderator **skimming the surface** of topics, failing to probe or follow up on topics, wrapping up the topic after the respondent's first statement
	Manner of posing questions – **open-ended questions**, put rather as exploring problem areas, like: "Could you please tell me about . . .", "What are your experiences with . . .", "What came to your mind after watching this commercial?"	The manner in which questions are phrased – **closed-ended questions that are conclusive in nature**: "What do you like best?", "Have you used . . .?", "Does this commercial appeal to you?"
	Non-verbal communication **stimulating** the respondent's responses – open position, signals of attentiveness and active listening	Non-verbal communication **blocking** respondent's answers – closed position, no active listening signals only lack of interest in respondent
Specificity of respondents	**Talkative**, and articulate respondents	**Silent** respondents
	Articulate persons forming complex statements	Reticent respondents making simple statements
Group dynamics	A **great deal of dynamism** in the group, cooperative, and proactive	**Low group dynamics**, passive, clammed-up, not engaging in discussions but merely responding to questions
Interview location in the research process	**Closer to the start** of the research process, first few interviews	**Nearer the end** of the research process, last interviews (especially in studies comprised of a number of interviews)
Subject	**Engrossing**, exciting, and valid topics for the participants	**Unattractive**, boring, and uninspiring topics

The questions should be sorted in the order of their significance for the research, which is why the most important questions should be discussed closer to the beginning when the respondents are full of enthusiasm and energy to discuss the issues and not towards the end when they may already be tired or there may not be ample time to cover the issues. However, the most important questions should not be right at the beginning either because respondents (regardless of whether it is a group or an individual interview) need time to become accustomed to the new interview situation and to get to know each other (especially in the case of focus group interviews).

Questions from each of the topic areas should be put in an order starting from the more general and spontaneously voiced opinions, gradually moving towards more specific and detailed issues. Hence, we are first asking about "what impression did the commercial you just watched make on you?", and only later probing about the images, soundtrack, messages, or the product. This is very important from the

perspective of getting underneath people's responses and unearthing the unconscious and automatic processes (see also Chapter 2). The answers to the questions concerning first associations are usually a better reflection of the not fully conscious or rationalised opinions. What is more, when asking open-ended questions, respondents tell us what is most important and more significant to them, while closed-ended questions, referring to specific information, trigger more control mechanisms. When enquiring about first associations, it is exactly what is automatic and not fully conscious that we want to uncover. If this is taking place in a group interview setting, it is best to ask the participants to write down their first associations on a sheet of paper and move on to discuss the topic later on. If we let the group (regardless of whether it is made up of two or eight persons) discuss it straight away, we will only manage to capture the association of the first respondent to speak, as the next respondents will have the time to give more thought to their response and possibly modify it (even unconsciously) in light of what was said beforehand.

Box 6.7

A qualitative interview script should be structured like a funnel, in the sense of a "top-down" approach, starting from questions that are most general and unstructured, and slowly moving towards more and more detailed questions (from more general to more specific). This principle can be repeated several times during a single interview in relation to each of the topics discussed.

In the context of the reflections on the order of the interview topics, a question that often crops up is where should projective techniques be placed in the interview course. It was traditionally assumed that projective techniques shouldn't appear too early on in the interview course because they may prove too difficult to carry out at first before the respondents become accustomed to the interview situation (both group and individual). It was supposed that the respondent has to first feel at ease, through the conversation being about something less threatening. However, after much qualitative research and practical experience, I am becoming increasingly convinced that this is unnecessary and a good, adept moderator can easily begin the interview from the seemingly difficult projective techniques (of course, after their relevant introduction – cf. Chapter 4). The advantage of this order is that it channels the whole interview from the very start onto emotional and automatic tracks, while also increasing the chances of reaching the deep and unconscious areas.

Just like most of the rules associated with qualitative research, the rules about the form of the interview guide are also quite loose and relaxed. Some moderators, no matter how experienced they are, feel much more comfortable with a guide in the form of questions than problems. If this is the case and attempts to change it have reduced the moderator's efficiency, irrespective of the rules, it is best to stick to what suits the moderator best (even a guide in question form). The overriding rule is to prepare the tools in line with what the moderator is most comfortable with so as to maximise their effectiveness in conducting the interview and gleaning the desired information.

The guide, to a large degree, reflects the individual style of the moderator and, most of all, is there to aid and not to impede (cf. example of focus group interview discussion guide – Appendix 1).

Box 6.8

If we want to get to grips with the first, automatic associations in a focus group interview, it's a good idea to ask the respondents to write down on a piece of paper the first thing that comes to their mind, and only to later discuss this with them. If we let the group discuss it straight away, we will only manage to capture the association of the first respondent to speak, as the next respondents will have the time to give more thought to their response and possibly adjust it in light of what was said beforehand.

The structure of the interview: unstructured or structured

While discussing the interview guide, questions are often asked about the extent to which a focus group interview and individual in-depth interview should be structured. There is no straightforward answer to this question. In fact, both a group interview and individual interview should not have too rigid a structure as qualitative in-depth methods. The degree of the structuring of an interview largely depends on the individual preferences of the moderator (unique moderator style), the client's preferences, the scope of the research topics, and the research objective. If we are interested in the difference between relevant study groups – women, men, young people, older people – the structure of the interview should be more defined (Morgan & Scannell, 1998). Conducting an interview in a similar way across several groups and asking analogous questions allows for better comparability of results. The same applies to studies carried out by several researchers, international research, and regularly repeated studies.

If the qualitative research concerns a relatively well-known issue, the questions that should be asked can be more specific, which is why such studies are also usually more structured. When less is known about a given topic and the objective is to explore an unknown problem, less structured interviews are run. The topic guide in this situation is more open because it's usually very difficult to foresee all the topics. Questions arise during the course of the interview and result directly from the earlier statements of respondents. Of course, in order to successfully conduct such a study and for it not to be a conversation "about everything", the research goals need to be very specific and the moderator must never lose sight of them when facilitating an interview. To prevent interviews from becoming 2 hours of off-target verbosity, the study also requires experienced moderators. Smooth and logical goal-focused navigation through the research subject area gives an indication of how competent and experienced the moderator is. It should be remembered that less structured interviews are also more difficult to analyse and, because of this, require a more experienced qualitative researcher. The difficulties with such analysis consist of distinguishing the actual differences between the groups from those linked to a different interview course, the particular manner of asking questions, and the varying order of discussion topics.

Box 6.9

Qualitative interviews, because of being in-depth and unstructured (both group and individual), require a great deal of experience from the moderator so that they not stray off the topic. A highly experienced person is also needed to analyse the results of qualitative research in order to differentiate between information which could have resulted from the way the interview was conducted and information which is independent of this.

Interviews that are freely conducted and in an unstructured manner have the advantage of giving the respondent the chance to talk about what is important to them and reveals their way of seeing the world. Thanks to this, the moderator's perspective of the world is not imposed on the interview structure. It should, however, be admitted that giving the respondent the freedom to choose what they want to talk about is not always advisable. There are situations where the topic of interest to the researcher is not always easy to discuss for the respondents and they may naturally want to stray from the topic. The moderator must then tactfully steer the interview and keep respondents from rambling. One example can be an advertising communication study. After watching a commercial tested in qualitative research, respondents are usually keen to talk about whether they liked it or not as well as what they liked and disliked in it. This information is not particularly meaningful for the marketing researcher because whether they like or dislike the tested commercial is much less important in view of the qualitative research goals than what emotions it evokes, how they understand the communication, and how they perceive the advertised product (cf. Chapter 1).

Box 6.10

The purpose of qualitative research is to understand how the respondent sees the world and not how they respond to the vision of the world created by the researcher. That is why if qualitative research is too structured, it limits the understanding of the true image of the studied issue.

Question type rules

Conducting a qualitative interview is mostly about asking the right questions to glean as much information as possible. Hence, the questions that are asked by the moderator and how they are framed are critical to the interview's success (Creswell, 2013; Creswell & Miller, 2000). Is the interviewer skilled enough to frame the questions to win the trust of the respondents, encouraging them to share their opinions, or do they pose the questions clumsily, generating tension and hindering exploration and discussion?

Questions in an interview have two basic functions: they should be informative and motivating (Wertz, 2014). Informative questions are used to search for specific information and the quality of the results obtained depends on the manner in

which they were framed. Motivating questions serve as the basis for maintaining and enhancing motivation for discussion and signal the moderator's interest in the information provided by the interview participants.

Adjusting the language of the questions to the participants

Questions should always be put casually, freely, and be worded in the language of everyday life. This does not mean, however, that less attention should be paid to the framing of the questions because the way in which questions are worded largely determines the answers we exact.

When asking questions in an interview, one must never lose sight of who we are addressing them to, who our interlocutor is. The questions should be developed and spoken so that the recipients can understand them. Both the grammatical correctness and alignment with the level of understanding of the respondents are equally important here. The interviewer is often better educated and more experienced than the respondents, with comprehensive knowledge of consumer research. The everyday language of the interviewer and their worldview does not always coincide with the standpoint of average consumers. A researcher who lives in a large city, is well travelled, who knows several foreign languages, and has substantial earnings oftentimes talks to construction workers, manual labourers, or housewives, whose world and scope of experiences are limited to their work and to television. In this case, the moderator's ability to adapt to his/her interlocutors, to be properly understood by them, is essential. The moderator must also be careful not to use the jargon of professionals in the field of psychology, sociology, marketing, or advertising. Phrases like "what are your preferences" (psychological jargon) should be avoided and replaced by "what did you like the most, and what would you choose in these situations"; we do not ask about the "perception of an advertisement" (psychological jargon), but about "what comes to your mind when watching this commercial?" The use of colloquial language when asking questions often requires a larger number of words but, importantly, decreases the distance between the moderator and the study participants.

The questions should be well phrased, clear, concise, and specific. Shorter questions are generally clearer and easier to grasp, and the risk of losing the accuracy and clarity of the message increases with question length. The precision of the message is also lost when we attempt to get to the bottom of several things at once, as in "which of these commercials did you like the most and which did you find was easiest to understand?" Responses to questions framed in this way are always tricky for researchers because the commercial that was easiest to understand does not necessarily have to be the one that was most liked. Therefore, questions should be unidimensional; questions about what the respondents liked the most should be asked separately to what was easiest to understand in the commercials viewed by them. Moreover, it is important to remember that the questions should not suggest answers.

What questions to ask

A common pitfall in phrasing and posing questions in qualitative research is that the hypothesis or research problem (what we want to find out), is not always tantamount to the question we should be asking in order to unearth this information. And so, we should not be asking about the "brand image" but rather about "what

Table 6.3 Examples of various types of questions

Open-ended questions	*Closed-ended questions*
What do you usually have for breakfast?	Do you eat cereal for breakfast?
What does a typical day in your life look like?	What time do you get up?
What are your impressions of this commercial?	Did you like the advertisement that you just saw?
Non-threatening questions	*Threatening questions*
Have you ever been on a diet?	Why haven't you tried going on a diet yet?
Have you ever considered finishing university?	Why didn't you finish university?

do you associate with the product, with this name?", "what comes to your mind when you think about this brand?" The brand image is a research problem, the goal that we want to reach through the research. Yet, we can excavate this information not through asking such questions directly but by an insightful analysis of various other questions and tasks (e.g., projective techniques) and drawing the right conclusions from them. What's more, this information hardly ever comes directly from the respondents. Many times, in order to get hold of an answer to the issue of interest to us, we have to ask numerous questions and it is only through a penetrating analysis and interpretation of many respondent statements that the answers to our research questions can be obtained.

In qualitative in-depth interviews, open-ended questions definitely work much better than closed-ended questions in group and individual interviews alike. Open-ended questions are designed to encourage more elaborate responses, not just "yes" and "no" answers, spurring the respondents to engage in the discussion. When asking questions in a closed-ended manner, such as "Did you like this advertisement?", we are provoking a simple "yes" or "no" answer. If we asked the same question in an open-ended manner: "What are your impressions of this advertisement? What came to your mind when you watched it?", we are not specifying what areas are of interest to us. This is a way of letting the respondent decide what they found important and what they would like to talk about – whether about the things they liked or disliked, about the music, the images, the actors, or the actual message of the advertisement. It also reveals what was of greater importance to the respondent because usually the things that spontaneously crop up at the beginning are more significant.

Closed-ended questions usually impede discussions and interview dynamics. However, they also have their function and are worth using as a starting point for discussion to establish who we are dealing within the group. For instance, we can begin a study with new car users from asking a closed-ended question about the make of car that each of the interview participants has. A discussion about car service workshop satisfaction could start from probing which of them have used the services of a particular brand of car service workshop and which have never done so. A closed-ended question could also be in the form of a discussion wrap-up when, for instance, after a lengthy conversation about the characteristics of a tested fruit juice (taste, smell, consistency, sweetness), to end, we ask who likes this juice and who doesn't.

One of the strengths of open-ended questions is that they provide us with more in-depth information, whereas closed-ended questions give us more specific and

reliable data and facilitate replication of the results and tracking over time. That is why, in quantitative research where reliability and replicability is so significant, closed-ended questions are applied; in in-depth qualitative research, however, where the objective is to get the broadest possible orientation in a given field of interest, open-ended questions are more appropriate. With open-ended questions, however, one must always bear in mind that they shouldn't be too broad in scope, otherwise the respondents may not be clear about what specifically the questions concern. Let's say that we're interested in snacking habits, that is, in eating between meals. If we phrase the question as "What do you eat during the day?", the person may start from talking about their main meals, right from breakfast, omitting what they eat between meals altogether. It would be better if we narrow the question down and ask it more precisely: "What do you eat between meals, apart from your main meals?"

When framing questions, it is also very important for them to be worded in a non-threatening manner (or at least as unthreatening as possible). In consumer research, threatening topics appear relatively rarely. Nevertheless, there are issues like tampon use, personal hygiene, obesity-related issues, or the use of condoms, which are undoubtedly difficult issues to discuss but are also the subject of marketing research. Regardless of how personal, intimate, or sensitive the studied topic is, it's important to know that there are no topics that could not be discussed within qualitative research. What is relevant is how the questions are phrased because we can ask about the same thing in a more or less threatening way. Whether a given question will be perceived as threatening or not largely depends on how it is phrased and the non-verbal signals accompanying the question being put by the moderator, namely, their intonation and facial expressions, etc. If the non-verbal signals show that the moderator feels uncomfortable with the question, this also makes the respondents feel uncomfortable with it, which increases the chances of them being reluctant to answer it.

The questions used in a qualitative in-depth interview are usually in the form of multiple-sentence, extended statements. These kind of extended questions are particularly important when moving onto the next topic areas. Sentences that introduce the fundamental question help ensure the smooth and natural flow of the interview. Extended introductions should always be used to lead into projective tasks (cf. Chapter 4).

Question and topic sequence rules

Apart from the wording of the question, the sequence of the questions (topics discussed) is also important. Regarding the structure of the interview, the topics discussed should be planned in line with the logic of the given problem. If we want to conduct a study involving new car owners, we should first discuss what spurred them in to buying this particular make of car, to be later followed by a discussion about the sales process itself, and not the other way round. If we start with questions about a sale, statements about their buying motives will soon inevitably crop up. If the issues that have just spontaneously appeared are ignored (not be sufficiently discussed) it will be difficult to return to them at a later time when this topic was actually intended to be discussed. If, however, we decide to probe the thread of the buying motives that just spontaneously appeared, the fundamental topic (sales) may not be exhausted.

Apart from the right structure of the whole interview, the way the questions are ordered within each topic is also very important. An overarching principle is to gradually

and seamlessly lead respondents into the topic. That is why questions that are general in nature are asked first, to be later followed by more detailed questions. We should start from what the participants want to say about a given topic, after which we can probe the topics of interest to us. The first thing to ask about is their general assessment and then their evaluation of the dimensions that are of interest to us.

The right order of questions is also crucial to the interview being effective and natural, otherwise the questions can jeopardise the comfort of the participants (evoke negative emotions) and be too difficult for the respondents. The interview should start from more general and pleasant questions, then gradually move on to more challenging and sensitive ones or ones raising negative emotions. This question-asking strategy reduces the chances of defence mechanisms, especially that of resistance, being triggered. As mentioned before, threatening topics rarely crop up in consumer research but that does not mean they are absent from it altogether. These include issues relating to physiology (like intimate hygiene, the use of sanitary towels, etc.) and topics concerning personal appearance and self-esteem (e.g., being overweight, having acne, women's facial hair problems, etc.).

The same applies to the sequence of questions of varying difficulty. We start from the questions that are easier for the participants to answer and gradually move on to more and more challenging ones. It's easiest to talk about facts, about what one has done, and what things have happened, which is why we usually start qualitative research from such questions ("What kind of facial products do you use?", "How often do you drink beer and in what kind of situations? Could you please tell me about them?", "Where did you go on holiday this year?"). It's much more difficult to talk about motives for choice and actions, and even more so to discuss the reasons for a rejection ("Why do you use these very facial products?", "What made you choose this form of holiday this year?", "Why aren't you using anti-ageing face creams?"). Talking about feelings, especially justifying them, is also very difficult – explaining why one likes or dislikes something, which is so very common in qualitative marketing research. This is why interviews seldom begin with this set of questions.

Box 6.11

Basic principles of question sequence

- In the order of the topics discussed
- In line with the logic of the research problem
- From neutral to more awkward (from positive to negative emotions)
- From easiest to more difficult
- From general to detailed

Order of topics and interview sections

A qualitative interview scenario involves some sections which should always be covered (see Table 6.4). The first few sentences belong to the interviewer. This is a kind of welcoming of the participants, the interviewer's self-presentation, and a warm-up to the discussion. It's important not to forget to lay down the rules of the meeting at

the beginning. The participants should be informed that the meeting will be voice-recorded and watched, and reassured that the greatest degree of discretion will be exercised (data only being used for research purposes and not being disclosed anywhere else). During the introduction to the focus group discussion, a few words should also be said to develop the respondents' sense of security: that every opinion is equally valid and that we are very eager to hear from every single one of them, not just simply the majority opinion or positive opinions.

After this, the respondents are invited to introduce themselves. The issue of the moderator's and respondents' introduction, more specifically, the scope of this introduction, raises considerable controversies among qualitative researchers. There are moderators that give a lengthy self-introduction by talking about their family circumstances, hobbies, and interests, believing that this will help build and cement rapport with respondents. I personally think that there is no need for an extensive self-introduction on the part of the interviewer, where personal information is revealed. First, this is not a building block for forging a relationship with respondents (contrary to active and engaged participatory listening, non-verbal communication, and genuine interest in each participant); second, this kind of information can actually enhance the distance between them if it does not fit in to the group (e.g., the lifestyles or the family situations of the group participants and of the moderator being completely different). Information concerning the family situation is always a label through the prism of which the interviewer will be viewed. From the point of view of the research, whether or not the moderator is married, in an informal relationship, single, engaged to be married, or divorced is completely irrelevant. It also does not matter whether they have any children, what their educational background is, or their age. Their hobbies, what they like and dislike doing in their free time, is even more irrelevant. In this respect, the role of the moderator recalls the role of a therapist, where maintaining an asymmetry between different roles is always necessary. The moderator must be aware that the manner in which they introduce themselves at the beginning will later shape the way the respondents introduce themselves. If the moderator, especially in the focus group interview, says that they have a dog, then, each subsequent respondent will refer to this by bringing up the fact that they own a dog, making all the respondents who don't have any pets feel very uncomfortable.

I also am of the opinion that in most cases (especially when using focus groups) there is no need for comprehensive self-introductions on the part of the respondents that would include socio-demographic data like their age, marital status, children, and free time. Although this has become common practice, it does have several flaws. For one thing, this information may, contrary to appearances, be quite embarrassing for many people (e.g., their age or marital status), which is why, instead of creating a more congenial atmosphere in the group, it may lead to tension and discord. For another, some of this information works like labels and completely unnecessarily opens a whole host of stereotypes. This is true of certain professions and pastimes (especially the more unusual and unconventional). Research, where the objective is to gain a deeper understanding of the respondent, their life, values, and needs, is something completely different altogether, in which case, extended individual in-depth interviews and in-home interviews are much more suitable.

Coming back to qualitative research conducted in focus group facilities, the self-introduction should be brief and limited to sharing one's name (without the surname)

and saying a few words about oneself. After a brief introduction, a few warm-up questions very loosely related to the topic are worth asking. These questions should be easy to answer so as not to catch anyone off guard and to facilitate straightforward responses. It's best to give everyone in the group the opportunity to speak and share about themselves as this helps bring down barriers. If a respondent has already shared his/her thoughts publicly at least once in a given group, it will be easier for them to spontaneously speak up about something with candour, even about the more challenging and threatening topics, and even despite being a naturally reticent person.

The introduction should be followed by a warm-up section intended to make the respondents feel more at ease with the interview situation, which – for the majority of them – will be a new experience. What is particularly important in a group interview is for each of the respondents to get a chance to say something in this part. This kind of "polling" of each participant is meant to encourage less active persons to overcome any possible barriers they may have to public speaking. These are very important questions in terms of the group dynamics but less so as far as data collection goes. This part of the discussion helps the people in the group to get to know each other and to get the discussion going. Since the group has not yet developed rapport and closeness, there shouldn't be any critical questions in terms of the information sought. This part of the interview lasts about 15–20 minutes.

After the introduction and warm-up section, begins the third, crucial, part of the interview, directly linked to the topic. It is in this section that the fundamental questions are asked – those that are the most important from the point of view of the topic. In focus group interviews, these questions are posed once the group feels more at ease. We can move on to these questions much earlier on in individual interviews or dyads. However, there can't be too many fundamental issues (in terms of the thematic areas), otherwise the conversation will end up being superficial. Usually about 10 to 20 minutes is allocated to each topic. This part of the study requires a great deal of concentration and focus on the part of the moderator.

A qualitative interview, like every good literary work, should have an introduction, a substance, and an end. That's why it is worth dedicating the last part of the interview (5–10 minutes) to wrapping the discussion up (closing questions). Here, the less active participants can be given one more chance to present their point of view and additional questions for which there was no time earlier on in the interview can also be put to the group, along with clarifying any issues that weren't completely clear before. At the end of the group discussion, the participants can be asked to vote, for instance, on which of the two tested commercials they like the most, who prefers packaging A, who B, and who C, etc. We mustn't forget, however, that the results of such votes should not be interpreted quantitatively but should rather be treated as one of the ways to wrap the discussion up. Another thing worth asking the respondents is whether or not they have any comments or anything else to add, giving them the chance to spontaneously share their thoughts and opinions. It is unfortunate that in-depth qualitative interviews (especially group ones) are usually so overloaded with discussion topics that there's no time left to gently bring the discussion to a close. Hence, interviews are often ended abruptly with the curt statement: "Well, that will be all, thank you". Bringing the interview to a smooth conclusion is indeed difficult but endeavours should nevertheless be made to tailor the closing since this is much more satisfying to the respondents.

Table 6.4 Parts of the qualitative interview, their function, and examples of discussion areas

Interview part	*Function*	*Example discussion area*
Introduction	Explaining the rules	• The interviewer's self-introduction • Information about the topic of the meeting • Interview recording notification • Additional information, e.g., about refreshments provided • The self-presentation of the respondents
Warm-up (engagement questions)	Establishing rapport between the interviewer and the respondents, helping the respondents get accustomed to the situation One or two rounds giving everyone the opportunity to speak – overcoming concerns	• Giving a simple, non-threatening topic for the respondents to discuss that they can easily talk about • Questions about facts and experiences are preferred (easier) than requesting opinions (more challenging). Questions concerning use of the category should appear at this stage • Sometimes a more extended self-presentation of the respondents can also be treated as a warm-up • Depending on the circumstances, this part of the study can be brief
Fundamental questions	A deepening of the most important research areas that are crucial to the project and expansion of the marketing questions	• More difficult tasks and questions can appear at this stage, requiring more focus and concentration from the moderator and greater effort on the part of the respondents • About 15 minutes should be allocated to each question/topic (4–5 questions/topics) • This is where projective techniques are usually introduced • Example areas: ○ History of category use ○ Pros and cons of the used brand ○ Reasons for using a given service provider ○ Testing of positioning concepts
Follow-up questions	Gives the interviewer the chance to ask about less important issues for the research project	• The questions can be less significant to the research goal and can include follow-up questions that can be sketchily discussed in the event that the moderator run out of time • For example, in a study on positioning testing, asking about opinions on samples of category commercials to get a feel of the general preferences
Conclusion of the interview	Leading to the natural conclusion of the interview, to avoid a sudden ending	• Notifying the respondents that this would be all, on the moderator's part • Asking whether the respondents have anything else to add

Pilot interview: the last check of the discussion guide

No matter how experienced the moderator is, they can never completely foresee how the interview will go, whether or not the script will adequately cover all the important issues, if the planned discussion topics will get to the heart of the problem and, most of all, if the introduced projective and enabling techniques will work as intended. Hence, putting the script to the test in an earlier pilot study is strongly recommended. However, this is impracticable in most research settings due to both time and financial constraints. This is why the first interview becomes a sort of pilot study for the discussion guide and tasks, so we shouldn't be afraid of introducing script modifications and adjustments after the first interview. Sometimes, it turns out that the carefully planned sequence of topics is inadequate or the selected tools and techniques are inappropriate for the treatment of the research goal, in which case it's better to modify the script than stubbornly stick to an ill-fitting tool.

Box 6.12

The first interview (regardless of whether group or individual) is often a kind of a pilot study of the discussion guide. Therefore, one shouldn't be afraid of implementing script modifications following it. If it turns out that the pre-arranged order of questions or the prepared tools and techniques fail to lead to the answer to the research questions, it would be better to change the discussion guide accordingly instead of forging ahead with an inappropriate tool.

The things that are completely unacceptable in quantitative research (e.g., modifying the questionnaire during the study or after several interviews), is quite acceptable in qualitative research due to its specific nature (if it will improve the quality of the gathered data). What is absolutely imperative in quantitative research, which, when departed from, would constitute misconduct (a change in the sequence of questions, the use of a different tool in two measurements), is completely legitimate in the case of in-depth qualitative research.

Sometimes, especially in large-scale qualitative research comprising many interviews (e.g., 20–30) and facilitated by several moderators in many locations, conducting a pilot test interview to pre-test the efficacy of the script and to allow the moderators to specify the goals of specific parts of the interview is very useful. It doesn't necessarily have to be an additional interview, it can be the first interview in the study, but it has to be appropriately planned and prepared. Even if the entire study has been arranged in the form of in-home interviews, it is better if it is conducted within a focus group facility as this allows the client to observe the interview and to be able to hear the explanations of the person in charge of the research regarding which marketing and research questions are meant to correspond to which script questions and tasks. Such an interview should be attended by all the interviewers and the person with the greatest research experience on the side of the client. It should also be followed by a debriefing where any changes to the script are discussed and its final version is worked out and finalised.

Box 6.13

CASE 6.1 From values, needs, and parental relations to food

The objective of the qualitative research carried out by PepsiCo was to gain an understanding into which individual traits of a mother (her attitude towards life, values, and needs) and her relationship with her child (parenting model) affect her eating habits and behaviours. A total of 30 ethnographic individual in-depth interviews (carried out in respondents' homes) were conducted with mothers of children aged from 1–12 years old. The interviews were carried out in the presence of the child, which allowed the relationship between the mother and child to be observed throughout. The interviews lasted 2–3 hours; two-thirds of this time was dedicated to general issues, and only one-third to nutrition topics. This set-up gave insight into how the approach to life and motherhood translates into dietary habits. The script covered the following topics (in the order in which they were introduced into the interview) and the reasons for their inclusion in the interview:

Topic	*Goal of conversation*
1 **Mother's and children's self-introduction**	Finding out key background information about the family (husband, children) and professional status (employed or unemployed)
2 **Projective task:** "me now vs. me in ten years' time"	Finding out the mother's values and needs, her approach to life, her aspirations
3 **Motherhood:** how she looks after her children, where she gets her knowledge about upbringing from, her authority figures, the role of motherhood in her life, pleasant and unpleasant aspects of motherhood	Understanding what her outlook on life is in confrontation with the reality. Understanding the role of motherhood (happiness, duty, struggles, etc.) and its place in the structure of her personal identity. Understanding the role of motherhood in the family: resting with the mother or shared responsibility with the father. The source of knowledge and support
4 **Domestic responsibilities:** division of responsibilities between the husband and wife, the child's approach to doing household duties, the duties of the child, the child's participation in shopping (particularly food shopping), and the child's impact on the choice of products and brands	A diagnosis of the model of the family (partnership, modern, traditional). The sources of such a model (developed together or imposed by one party) and its consequences (satisfaction vs. frustration) The participation of the child in household duties as a manifestation of the model of upbringing The child's participation in shopping and his/her impact on consumer choices
5 **Education, upbringing:** the child's education (type of school, why this school), extracurricular activities (what kind, why, the role and significance of extracurricular activities for the mother)	Understanding the model of upbringing in the family and the way parenting roles and the role of the school is perceived in the raising process – diagnosing who "steers" the decisions, to what extent does the child do as they please and impose his/her will on others (control, democracy, absence of rules). Perceiving responsibility for upbringing: parents vs. school vs. "the child will grow up on its own"

6	**Ways of spending free time:** a normal day of the week, the weekend (the role of the internet, time spent with the father), preferences and actual behaviour, who decides how they spend their time (parents, children), summer holidays	The source of knowledge about family relationships – who decides what is the basis of the decision (e.g., the good of the child, child preference, the convenience of the parents) and a lifestyle diagnosis (active vs. passive)
7	**Nutrition:** what their daily meals look like, what is eaten where (at home, at school), what's important in preparing food	Understanding the eating habits at home (health, speed, price, hassle-free) and the role of eating in the family (satisfying hunger, prize, easing pangs of conscience, another obligation)
8	**Snacks:** what is eaten, what snack-eating habits are in place – who decides what is bought, chosen, how often it is eaten, views about what is healthy/ unhealthy, allowed/ not allowed	Understanding the presence of snacks in the life of the family and the child: perceptions and behaviour

Source: Maison&Partners and PepsiCo

Exercise 6.1

A snack manufacturer would like to understand the "World of Snacks", what people snack on, in what situations, why certain snacks are bought while others aren't, and why specific snacks are chosen in certain situations. A total of six focus groups have been planned with the following groups of respondents: (a) heavy users of salty snacks; (b) heavy users of sweet snacks; (c) light users of snacks (salty and sweet).

Design a discussion guide for such research, taking into account which interview elements would appear throughout all the focus group interviews, and which are applicable only to specific groups.

Exercise 6.2

Go back to Exercise 2.1 concerning understanding the barriers related to the use of modified milk by mothers of small children (aged 1–12 months) who are having difficulties with breastfeeding their child. Consider what the interview guide for an in-depth individual interview should look like and what projective or enabling techniques could be implemented in order to understand the barriers that breastfeeding mothers have in relation to this product:

- Prepare a script for a 2-hour interview, specifying the estimated time for particular interview phases (issues).
- Suggest 2–3 projective or enabling techniques that could be applied during such an interview.
- For each technique, describe what a given technique will be diagnosing, what the task will consist of, and what instructions the respondents will be given.

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7 Step 3: conducting an interview

The difference between good and bad moderators

Good moderation: a skill or a gift?

Who can become a moderator?

The first question in the context of the discussion about who can be a qualitative interview moderator almost always is what educational background would best prepare a person for a career in this field. Unfortunately, there aren't any academic degrees that would actually prepare the person for a job as moderator (Levitt *et al*., 2018). There is a certain skill set that can be mastered on some degree courses which can help smooth the way for a successful career. Practice shows that a degree in psychology is a great advantage in being a moderator as it lays solid foundations for the use of qualitative research methods and projective techniques, and equips the person with interview facilitation skills, understanding other people, and interpersonal communication. A social sciences degree like sociology, providing knowledge on society and the intricate mechanisms of human behaviour, is also useful in the later work of a qualitative researcher. It must be said, however, that a psychological or sociological background, although constituting solid grounding for the development of further skills, is neither essential nor sufficient to be a good moderator in the marketing research field. A good consumer research moderator also needs extensive knowledge of marketing, consumer behaviour, and advertising, which can be acquired through marketing studies or experience. Only then can the discussion be led to glean the most useful information, which can then be harnessed to solve specific marketing problems. For example, in qualitative pre-testing of a commercial, only a moderator that knows how advertising works will be able to guide the discussion on the right tracks to ensure effective advertising (e.g., understanding the message and credibility), and away from the less pertinent issues that respondents are more inclined to discuss (e.g., whether or not they liked the advertisement).

Box 7.1

A good moderator is one who combines knowledge in the social sciences field (psychology, sociology), marketing, consumer behaviour, and also has a series of other vital personality traits.

When working as a moderator, personality traits are equally as important as the knowledge held by the person (Chrzanowska, 2002; Gordon & Langmaid, 1995; Greenbaum, 1993). That is why persons that do not have a psychological, sociological, or marketing background but have the desired personality traits turn out to be very effective and can make much better moderators than those with degrees in the fields of study mentioned above, but lacking in the appropriate personality traits. Conducting qualitative interviews often looks like an ordinary, effortless conversation for outsiders, which does not require any preparation (Ponterotto, 2005a). Hence, it may seem to them that facilitating such interviews requires little to no effort. However, for the two or more hours of conversation to bring the desired results, provide the information of interest, and give reliable responses to all the research questions, the moderator must have the necessary knowledge of qualitative research methodologies and – perhaps above all else – many years of practical experience.

Box 7.2

The conduct of qualitative interviews often seems to be incredibly simple and easy to observers, almost effortless, and not requiring any special preparation or skills. However, in order for 2 or 3 hours of conversation to produce reliable responses to all the research and marketing questions, the moderator must have the necessary knowledge of qualitative research methodologies, consumer behaviour, marketing, and many years of practical experience.

Clients know best how important the moderator is for the quality of the findings, which is why they often stick to a tried and tested research agency because of the moderator facilitating the interviews, often commissioning studies on the condition that they get "their" moderator on the job. This attachment to a specific moderator and her/his style of facilitating the interview may be so great that the client follows the moderator in the event that they switch to a different research agency. These situations usually happen to moderators that are not only skilled in moderating but are also excellent qualitative researchers (which is not always synonymous!), and, on top of that, they have mastered marketing principles (see Chapter 8).

Box 7.3

Clients know best how important the moderator is for the quality of the findings in qualitative research. They often stick to a tried and tested research agency because of the quality of the moderator facilitating the interviews, often commissioning studies on the condition that they get "their" moderator on the job.

Experience: the way to success

It's best to learn moderation in practice, under the watchful eye of a seasoned moderator who can watch over the doings of the fledgling moderator, providing feedback

and giving guidance as to how to hone their skills (Chrzanowska, 2002). The learning process is long-lasting, based on self-observation, and the ability to learn from the experience of other seasoned and professional moderators. This is analogous to the process of learning psychotherapy which is always done under the supervision of an experienced psychotherapist (Ponterotto, 2005b).

At first, watching group or individual interviews being facilitated by experienced moderators and scrupulously analysing one's own attempts at moderation helps develop the skills needed. Watching video recordings of individual in-depth interviews or focus groups facilitated personally also helps to catch mistakes, consider other ways of phrasing questions, observe one's own non-verbal behaviour and the reactions of respondents to the questions put to them (e.g., whether they understand them). I personally think that an excellent launching pad to becoming a moderator is taking on interview transcription work before actually setting about personally conducting interviews. That's why I always encourage my students who are thinking of going for a career in moderation to cooperate with research agencies in doing transcripts from the interviews. This is an excellent opportunity to become very well acquainted with different moderating styles and with the many ways of reacting to respondent statements (deepening the conversation, following-up, coping with difficult respondents), and to get a real feel for which methods are best suited to which situations (Goodell, Stage, & Cooke, 2016).

It is unfortunate that some research agencies don't pay enough attention to moderator training. In such companies, often anyone can become a moderator, and young, inexperienced staff with no prior preparation, supervision, or feedback are allowed to moderate individual or group interviews. A consequence of such practices are large numbers of moderators who, despite having years of professional experience and hundreds of conducted interviews behind them, are still conducting them badly and repeating basic beginner mistakes that have taken root (Chrzanowska, 2002).

Box 7.4

Stages of moderator skill acquisition and development

- **Knowledge** – theoretical introduction to the method – books (about facilitating interviews, qualitative research methods, focus group studies, marketing research), training, coaching.
- **Passive experience** – watching interviews conducted by more seasoned moderators.
- **Note-taking and transcribing** – taking notes of watched interviews of accomplished moderators, interview transcription work.
- **Supervised moderation** – taking the first steps in moderation under the watchful eye of an experienced moderator – at this stage, trainer feedback about the strengths and weaknesses of one's moderation is of major importance.
- **Studying one's own interviews** – watching and scrutinising video recordings of one's own interviews.

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- **Implementing changes, experimenting** – conscious attempts to deploy various different techniques (e.g., different ways of asking questions).
- **Working on honing non-verbal communication skills** – "reading" other people and what they want to say, and controlling one's own behaviour.

Choosing a moderator for a particular research project

An essential condition for qualitative research success not only lies in hiring a good moderator but also in matching their individual characteristics and facilitation style to the needs and requirements of the study (Berger, 2015). Exploratory research like positioning concept testing or pre-testing advertising materials requires much more spontaneous interview facilitation. The structure of such interviews is not fully defined since achieving the target is more important in this case than asking concrete questions. This is when a moderator that can smoothly and flexibly adjust the interview course to the study needs is most suitable. Studies focused on learning opinions, customs, and behaviours require a more systematic approach to conducting interviews, which corresponds to a different – more structured – moderation style. A good moderator can, of course, cope with any of these tasks but one moderator may feel better with one, and another with the other.

Box 7.5

There aren't any moderators, even among the very best, who would suit all clients. The very same moderator may be adored by some clients and unacceptable for others.

When talking about the fit of a moderator to a specific study, the general question of to what extent should a moderator be similar to the group she/he is talking to, often crops up. This is another question to which it is difficult to give a straight answer (Collins, 1980). Traditionally, there was a widely shared perception that the moderator should be similar to the group in terms of the basic demographic characteristics, in the sense that a female-only group should be led by a woman, and a group made up of elderly persons should be facilitated by an older, rather than a younger, moderator. However, the first is not always possible, and the second is not always actually necessary. Matching the moderator to the respondents in terms of their age is advised but this does not mean that they should be exactly the same age as them. Being skilled at leading a group and establishing and maintaining rapport are much more important. The moderator should be chosen so that the participants will want to freely talk to him/her about the subject of the study and feel at ease in their company.

There is also the perception that the moderator should match the group in terms of gender but this largely depends on the research topic. There are topics where a moderator of different sex to the respondents renders conduct of the interview impossible or changes its scope (Haverkamp, 2005). For this reason, I would avoid a male moderator in a study on use of sanitary towels by women or about having trouble with finding a partner, while a female moderator would not be advisable for studies concerning

prostate problems or erection issues (assuming that this is a study involving men and not their partners, of course). As a rule, the principle of homogeneity and group cohesion described earlier also applies to the moderator. The more fitting the moderator is to the group, the better the group interaction and communication. Matching the gender of the moderator and the individual interview participant is somewhat less of an issue because striking a gender balance doesn't pose a problem in this setting.

Another question concerns whether the moderator's scope of experience corresponds to those of the respondents. This certainly is not a prerequisite – one absolutely does not have to be obese in order to facilitate an interview with overweight people, one does not have to have a small child or even be a mother at all to talk to mothers about their children's nappies, and one does not have to be a pig farmer to talk with pig farmers about the feed they use. Sometimes, lack of experience in a given matter actually helps because the moderator can stay more focused on understanding the problem and will not emphatically engage with the respondents in the problem, start exchanging expertise, or slip into the dangerous for the moderator "understanding without words" style. In the case of most consumer products (both fast-moving consumer goods (FMCGs) and durable goods), if the subject of the study is to get to know the opinions of ordinary consumers and not experts, the moderator does not have to have any specialised knowledge in the given field, which means that they don't have to know the ins and outs of the yogurt production process to facilitate a study on yogurt consumption, or know the composition of tobacco to conduct a study on cigarettes. It's enough that the moderator has her/his personal experience as a consumer. It follows that the aim of such studies is not the confrontation of the consumer's knowledge with the (genuine) knowledge of the moderator but to understand how the consumer perceives the world, no matter what this world is like in reality. Let's not forget that in marketing research we are looking for knowledge about the way the world is perceived by the consumer and not for objective knowledge about the world.

The situation is completely different if we're conducting interviews with experts about specialist, professional topics, like interviews with physicians about the reasons for prescribing various medicinal products and different forms of treatment, interviews with architects about the specialised solutions implemented by them, or with CFOs concerning financial management solutions. In these cases, a regular, run-of-the-mill moderator may not be able to cope because they may not have the skills to guide the conversation to distinguish the banal threads, which should be overlooked, from the important leads that require probing. The complete lack of professional knowledge in a given field may not only impede the search for information but also be seen as ignorance and ruin the rapport established with the respondents. If the expert respondent taking part in this kind of study starts to suspect that the moderator (or person facilitating the in-depth interview) has no knowledge whatsoever about the particular field, they will not treat the moderator as a conversation partner, which can, of course, damage the relations between the facilitator and the respondent. One should remember, however, that not every interview with an expert requires specialist knowledge of the moderator. If, for instance, a study involving physicians concerns medicinal product advertising or relations with pharmaceutical representatives, qualitative market research and marketing expertise and general knowledge about the field of study will suffice, with any specialist medical knowledge being superfluous.

Despite the principle of matching the moderator to the group, cases of deliberate mismatching can also be encountered as a means for soliciting information (De Vault, 1990). If this is the case, the moderator is selected so that it is blatantly obvious that she/he

knows nothing about the subject of the study – for instance, a young man talking to mothers about nappies or a woman talking to men about DIY. Such a strategy aims to provoke the participants to discuss things which they would otherwise omit from the conversation had there been greater cohesion between the moderator and the group (higher degree of commonality of experience), since such information may have seemed too obvious to share in the circumstances.

Characteristics of a good moderator

Cognitive skills

The goal of qualitative marketing research is often to understand the reasons behind people's behaviour, finding out why people act the way they do, why they choose some brands over others, and why they like and feel encouraged by certain advertisements while others have the opposite effect on them. That's why a moderator has to be a perceptive and probing person who is not appeased by superficial answers of the study participants but is relentless at putting out feelers in order to deepen the interview (Gergen, Josselson, & Freeman, 2015; Gilligan, 2015). The difficulty here is in deftly deploying deepening techniques. Although the purpose of the probing is to reach the causes of motives and behaviour, in other words, getting to the bottom of why a given person acts in a certain way, the moderator should avoid asking about this directly. The hows and whys are actually research level questions which should not be put directly to the respondents. These are questions that assumes a logical answer but the areas to which the study pertains lies usually in the realm of the unconscious and may seem to be illogical. Because of this, asking the hows and whys outright may cause some embarrassment to the respondent or trigger self-justification responses (providing excuses) for one's feelings, opinions, and choices. Hence, the hows and whys should be replaced by several more descriptive questions concerning various aspects of these reasons. For example, if we are trying to find out in a particular study why a given person eats oatmeal for breakfast, instead of asking respondents directly (the simplest and most trite answer to which would be "Because I like it"), it would be much better to ask them several open-ended, descriptive questions: "What makes you want to eat oatmeal for breakfast?", "What is it in oatmeal that you like the most?", "Which oatmeal characteristics are most to your liking?", "In what situations would you choose oatmeal over other products?" It's only once the responses to such questions have been analysed that any inferences can be made about what motivates a given person to reach for oatmeal instead of other products and why they eat oatmeal in the morning.

Box 7.6

Replacing general and declarative questions with questions referring to experiences increases the chances of bringing to light the behaviours or opinions that are less socially acceptable or less conscious. That is why, in order to know eating habits, it is better to ask the respondents to share about specific situations (like what they had for breakfast today), than general questions about how they behave in certain situations (e.g., what do they usually have for breakfast).

Flexibility in conducting the interview is also crucial. Without this skill, the moderator will not be up to introducing adjustments to the interview course as the need arises. They should be experienced enough to change the way the questions are phrased and their sequence, be able to come up with and seamlessly implement new techniques during the course of the interview to further assist and bolster gleaning of the sought-after information. Of course, this does not mean that the moderator should arbitrarily make changes to the study course and dismiss the expectations of the client. However, if the moderator senses that the questions or tasks chosen for the study (e.g., a specific projective technique) are not leading to obtaining the desired information, for instance, if the respondents do not understand the task given, feel embarrassed carrying it out, or are still giving too superficial answers, the moderator should be skilled enough to introduce modifications and improvements as required.

Box 7.7

The research problem (what we want to find out) is not always equivalent to the question that we should ask the respondent in order to obtain this information.

Apart from the insightfulness and flexibility in conducting the interview, the moderator should also have a very good memory, be a quick learner, and stay perfectly focused on the task. These skills are extremely useful in conducting the interview more effectively (Ponterotto, 2005c). Concentration helps in avoiding questions loosely connected with the study problem and in appropriately guiding the discussion. A moderator that remembers the earlier responses of respondents can seamlessly and effortlessly relate to them and doesn't ask the same questions over and over again. The ability to generalise the information obtained is also invaluable in managing the interview. Thanks to this, the moderator stays on top of things, for his/her own benefit, summing up and analysing the information amassed in terms of whether the topic has been exhausted, whether it requires further probing or clarifying, and so on and so forth. A global picture of the information obtained at various points in the study can help the moderator assess if the topic should be pursued or if he/she can move on to the next issue. Persons with little moderating experience that are incapable of looking globally at the information gleaned during the course of the interview oftentimes only realise as late as on the level of analysis of the findings, that certain areas have not been sufficiently exhausted while others could have been wrapped up much earlier.

A global perspective also means that, throughout the interview, the moderator doesn't lose sight of the time horizon, which by far surpasses the very situation of holding the interview (the past – present – future perspective). Despite staying focused on the interview itself (present), the moderator should never forget the aim of the research, its goals, and objectives, and the very information to be extracted (past) and whether he/she will be capable of answering the pre-ordained questions spelt out in the research purposes (future). What is useful is asking oneself a set of auxiliary questions throughout the interview (see Box 7.8).

Box 7.8

Auxiliary questions which the moderator should put to him/herself when conducting an interview

- What else should I ask about? What other questions should I put to gain a better understanding of the participants?
- Have I heard everything I need to hear to gain a thorough understanding of the problem and to answer the research questions exhaustively?
- How much time do I have left? Do I still have time to get the answers to all the questions/issues that have been planned? Do I have the time to probe this issue further?
- What have I learnt? What have I found out from this study? Is the information gleaned by me so far sufficient to answer all the research questions and solve the marketing problem which the study concerns?

Interview facilitation skills

Conducting an interview requires a broad skill set needed to deftly ask questions and listen deeply. Irrespective of the discussion topic, the questions put by the moderator should largely be simple, both in terms of their length (short and without superfluous words) and the vocabulary used (simple language, without any specialist words or jargon). Apart from interviews with specialists, questions using professional and technical terms or too elaborate questions should be avoided (Watt, 2007). Confusing questions with long and drawn-out introductions are mostly phrased by

Table 7.1 Skills and qualities of a good moderator: cognitive skills

Skills & qualities	*Why they're important (what benefits they bring)*
Intelligent	Swift and adequate responses to changing situations (e.g., unexpected changes on the part of the client or resulting from the run of the interview)
Good memory and concentration	Focusing on the statements of the respondents and the research goals at the same time (being on the alert for non-meaningful topics moving the discussion off track), referring back to earlier remarks of respondents
Able to generalise	Summarising and analysing the information obtained during the interview in the context of the research goals and the marketing objectives
Insightful	Asking, probing and deepening follow-up questions, exploring the causes, not accepting superficial responses
Flexible attitude and mind	Capable of adapting to the flow of the interview as needed (question phrasing, question sequence, enabling techniques)
Open to new information	Open to the respondent's world being completely different from the moderator's world, and different from what the moderator imagined

budding moderators who can extend the introduction so much as to leave the participants completely lost and confused that they no longer know what the moderator is actually asking about. An experienced moderator will ask simple questions and use the language of everyday life thanks to which the interview will seem to be a friendly conversation – despite it being very far from just this – instead of a serious research project.

Apart from question-asking skills, active and attentive listening prowess is equally important. Beginning moderators, since they are most afraid of the ensuing silence after asking questions, judge the success of an interview by whether or not the respondents were eager to engage and were talkative. If the respondents – especially group interview participants – are chatty and actively involved, starting out moderators are so pleased that they often stop listening to what the group members are saying and assessing whether or not they are actually answering the questions being posed or, in fact, sidestepping the topic. In qualitative interviews, especially focus group interviews, the ability to distinguish "talking about everything and anything" from "statements sticking to the topic" is particularly important. If the respondents are straying off the topic, one shouldn't be afraid to interrupt (without creating a threatening atmosphere, of course) to get the conversation back on the track of the research subject and away from what the respondents want to talk about.

Box 7.9

For moderators, especially when conducting focus group interviews, the ability to distinguish between the situations when respondents are "talking about everything" (but in fact about nothing) from "statements sticking to the topic" is particularly important.

A moderator should also be very good at keeping track of time. Qualitative research is a kind of contract between the client, the research agency, and the research participants. It's also a term contract. The respondents get rewarded for their time and participation in a meeting that lasts a fixed amount of time. That's why interviews should not be extended too much. We must bear in mind that, for one thing, the participants have their own plans and schedules, for another, the next interview is often already scheduled and the client may want a break to go over certain things with the moderator. Excessively prolonging the interview is a common mistake of beginner moderators who lose too much time on introductory questions and have qualms interrupting the respondents regardless of whether they are talking about relevant or irrelevant things. Novice moderators who let the interview significantly draw out in time usually shift the blame to the focus group being overloaded and being unable – in the circumstances – to put all the questions in the set time frame. An experienced moderator, on the other hand, can assess if the focus group is overloaded or not by just glancing at the guide, even before actually conducting the interview and, based on this, facilitate the degree of deepening of various topics accordingly. The opposite of letting interviews overrun, which also is a common characteristic of beginner moderators, is exhausting the topic too quickly. Such a moderator can often manage to complete the entire interview

Table 7.2 Skills and qualities of a good moderator: interview facilitation skills

Skills & qualities	*Why they're important (what benefits they bring)*
Asks the right questions	Questions are asked using appropriate, simple, and comprehensible language
Knows a lot, but not everything	Creates a positive impression of a competent person but at the same time one that learns a lot from the respondent
A good listener	Shows a genuine interest in what is being said (and expresses this on the non-verbal level), actively and perceptively listens, and communicates this through their body language, facial expressions, gesticulation, and words
Distinguishes "statements about everything and anything" from "to-the-point answers"	Not afraid of interrupting people who stray off the point
Good at keeping track of time	Does not extend or cut the interview short; the actual duration of the interview is consistent with the planned time and they are capable of assessing how much time will be required for a given interview at the guide creation phase
A keen observer	Confronting the statements of the respondents with their own observations (especially during in-home interviews); keeps vigilant watch over group dynamics and adapts the interview course and tasks to the interview flow
Masters of non-verbal communication	Is mindful of all the non-verbal communication of the respondents and picks up on any inconsistencies between verbal and non-verbal communication

in 45 minutes instead of the planned 1.5 hours. This largely stems from insufficient deepening and probing, in other words, skimming the surface of topics.

Interpersonal skills

A moderator must be able to easily establish rapport. This is a key skill in every qualitative interview but particularly in focus group interviews. One of the greatest difficulties in conducting group interviews is that there is very little time to establish and build rapport and overcome possible reluctance on the part of the participants: first 5–10 minutes of group discussion. After the first twenty or so minutes, the moderator should have such good contact with the group to be able to seamlessly move on to more difficult, sensitive (due to their intimate nature), or threatening topics without disrupting the dynamics of the group. The moderator's personality is the most decisive in whether or not they will be able to establish good rapport with the respondents as some personality characteristics may impede while others may foster forging positive relationships. Additionally of relevance to building good rapport is the moderator's appearance and what they actually say at the beginning of the interview – how they present themselves and the study situation to the respondents. That's why the moderator shouldn't refer to things that emphasise the differences between the moderator

and the participants (e.g., that they are a psychologist) or clearly categorise or label him/her (e.g., divulge their bizarre or unusual hobbies) during the moderator's self-introduction (see Chapter 6).

Box 7.10

There is no need for an extensive self-introduction filled with personal information on the part of the moderator. First, this does not build rapport with the respondents and, second, such information can actually create a distance between them if there is a large difference between the moderator and the respondents.

It would also be good if the moderator is an energetic and dynamic person. A spirited moderator can give much more to life to the interview, thus, motivating the participants to take active part in the discussion. If the moderator lacks vigour and vitality and asks the questions in a monotone voice, the meeting will be dull and unattractive (despite it delivering the sought-after information), and this is difficult both for the respondents who have to bear with such a moderator for 2 hours straight and for the clients who have to watch such an interview. The moderator should create a pleasant atmosphere conducive to a relaxed and congenial conversation. The degree to which the meeting will be pleasant also depends on the interview topic, of course. Regardless of the topic, a good sense of humour and a relaxed and friendly approach also help shape a convivial atmosphere.

Table 7.3 Skills and qualities of a good moderator: interpersonal skills

Skills & qualities	*Why they're important (what benefits they bring)*
A natural flare for building rapport	The relatively short interview duration requires deft rapport-building skills and the quality of the information gleaned depends on the degree and swiftness of building relations
Communicative	Knows how to craft comprehensible questions for the respondents, leaving them with no doubt as to what he/she is after
Courteous and considerate	Regardless of the social, intellectual, and personality differences between the moderator and the respondents, they have genuine respect for them
Friendly and accepting	Knows how to create a friendly and pleasant atmosphere and bridges differences between people, creating a relaxed and casual atmosphere
A good sense of humour	Can joke about him/herself, can make light of tense situations, and can react with humour to different circumstances, not being afraid of sharing responses of laughter with respondents
Vivacious and dynamic (but not dominating or overwhelming!)	Thanks to this, interviews are invigorating and much more interesting for both participants and the observing client

Box 7.11

Some "do's and don'ts" for moderators

- When creating the discussion guide and throughout the interview, never lose sight of the **research goals**.
- Know the **aim of every question** in the guide – you have to know what each question serves, its functions and purpose.
- **Don't read the questions** from the interview guide. The questions should be smoothly and confidently introduced into the conversation. The guide is not there to be read but to be glanced at from time to time.
- Discreetly **keep track of the time**.
- Be **natural** – it's very important to be true to one's character as only then will the moderator feel fully at ease and the respondents will tap right into this.
- Stay **focused** on the participants and the research goals throughout the interview and not on yourself or the interview guide.
- **Learn** from every new situation – a moderator should consider himself a lifelong learner – there's always something to learn and imbibe from every moment and situation.

Types of skills advisable for group discussion

As I wrote earlier, the skill sets necessary to conduct individual and group interviews are, in fact, very similar. The cognitive or rapport-building skills mentioned at the beginning of this chapter are required both in individual and group interviews alike (Wilkinson, 1998). However, the fact that some moderators feel more at ease in individual in-depth interview settings or dyads, while others much prefer focus group interviews, shows that there is a certain skill set specific to each method.

One thing which undoubtedly is essential to successfully leading group interviews is a sound knowledge of group dynamics' rules and a set of group coping skills (Barrett, 2007; Forsyth, 1990; Gergen, 2014; Mariampolski, 2001). Group processes, which are a major advantage of focus group interviews, can unfortunately also be a source of problems and difficulties. It is impossible to avoid the undesirable consequences of group processes to the focus group course (e.g., group conformity); what we can do, however, is be conscious of them, try to understand them, and, in so doing, control them. A moderator who knows the rules governing group processes can facilitate the interview so as to successfully minimise their adverse impact on the outcomes obtained (Forsyth, 1990; Greenbaum, 1993; Mariampolski, 2001).

The largest threat to focus group interviews is group conformity which can be simply defined as yielding to the majority influence, involving a change in belief or behaviour, in order to fit in with a group even if a given person is convinced that they are right, not the rest of the group (cf. Box 7.12). In focus groups, the group conformity phenomenon cannot be avoided but the moderator can, with the right interview

navigation, minimise its effects. They may, for instance, clearly emphasise that every person in the group has the right to have a different opinion but also non-verbally interact with the participants, giving them support, and creating a conducive atmosphere in the group. The moderator, knowing about the tendency of more withdrawn individuals to agree with dominant persons, should encourage them to give their input first. They should also be sensitive to the non-verbal signals indicating that there are participants in the group that disagree with the opinions of the rest of the persons. Such signals may include a grimace or clearly leaning away from the table whilst others are speaking. Should the moderator notice this, they should always follow this up with the person concerned. Sometimes the topic can be so difficult and sensitive to social approval that the participants may not want to disclose and share their genuine opinions. That's when appropriate enabling techniques should be introduced which can help capture the independent opinions of each and every respondent before the discussion develops and in anticipation of the possible arise of the group conformity phenomenon.

Box 7.12

Group conformity phenomenon

The phenomenon of group conformity was shown in the classic experiment conducted by American psychologist Solomon Asch (1951, p. 279 and following). The participant in the experiment was tasked with judging the length of a line. The person being tested along with the group of the remaining subjects taking part in the study (who later turned out to be confederates assisting the experimenter), were presented with a series of board pairs where one board always contained one line (the target line) and the other contained three lines of different length (the comparison lines). Each person taking part in the experiment had to state which of the three comparison lines presented on the second board were most like the target line shown on the first board. The task was construed so that the right answer was always obvious and the confederates assisting the experimenter always gave blatantly wrong answers. The real participant always gave their answer last or as one of the last persons so that they could first hear the wrong (but internally coherent) answers of the confederates. After a series of these tasks, the real participant – despite noticing the absurdity of the situation and oftentimes having the inner conviction that he/she is right – started to give the same answers as the rest of the participants (i.e., the wrong answers). Later, when they were interviewed, this is how they justified their responses: "It was a group. They had definite views and mine didn't agree with them. [. . .] I felt that I am completely in the right but they could have thought that I'm strange". What's most interesting, however, is that the presence of only one ally who had the same opinion as the real participant was enough for the real participant to stay true to his/her opinion.

Box 7.13

Factors minimising the group conformity phenomenon

- **Appropriately phrased questions** – questions addressed to specific persons and not to the group (instead of "What do you all think . . .?", "John, what do you think . . .").
- **Appropriate moderation** – inquisitiveness and insightfulness.
- **Sensitivity to non-verbal communication** – particularly appearing while listening to other people's responses.
- **Good contact with the group** – an atmosphere of acceptance of all the responses being shared.
- **Introduction of individual techniques** – enabling techniques preceding a discussion on a given topic; sometimes it's enough to have each participant write down their individual opinion on a sheet of paper.
- **Supporting differing opinions to the majority** – the moderator may verbally or non-verbally support opinions which are inconsistent with the majority opinion in the group, encouraging sharing of contrasting opinions.

Dealing with different types of respondents

The dominant respondent

Another skill area needed especially by a moderator of focus group discussions is appropriate reactions to two different types of difficult respondents: dominant and domineering persons, and their exact opposite – quiet and withdrawn participants.

Sometimes there will be focus group participants who are highly involved, manifesting their superiority and competences, and who are always first to share their views on every topic. Energetic persons who are always quick off the mark sharing their answers to set questions are very helpful at the early stages of the group interview because they can encourage others to take part in the discussion with their confidence. Such persons help shape a model, proactive focus group respondent. One must not, however, allow them to always speak first throughout the entire interview. If it has come to this, attempts should be made to minimise their dominance and effect on other people's responses. The moderator should manage the discussion to tactfully weaken the dominance of such persons without offending them or putting them off. With such interventions, the moderator has to be careful so as not to create a threatening atmosphere in the group or assert excessive dominance over the group.

Box 7.14

Non-verbal ways of coping with dominant and domineering participants

- Avoiding eye contact.
- Giving them the cold shoulder – clearly turning towards other focus group participants and away from the dominant/domineering person.

- Refraining from commenting on the statement of the overconfident person.
- Directing questions to other, non-domineering persons (best done by addressing them by their first names).

If these indirect approaches haven't done the trick (which sometimes is the case), they can be asked directly to wait until the end to share their thoughts and opinions. This kind of intervention should always be done subtly and tactfully so as not to hurt anyone's feelings. It can also sometimes be done by emphasising their greater knowledge about a given topic, in which case, the request is not treated as a punishment but as positive recognition given by the moderator. The situation is much more difficult if this person is behaving like a second moderator and is trying to take over the group, directing it from a leadership position. Sometimes this is so strong and forceful on their part that it almost looks like a hostile attack on the moderator. The participant may even go as far as to suggest differing, more interesting – in his/her opinion – aspects of the discussion, interrupting the moderator mid-sentence, judging others, and sometimes even putting questions to other participants and attempting to hijack the interview. In such a case, techniques similar to those harnessed when trying to minimise the impact of dominant/domineering persons should first be deployed. If this doesn't help (and it sometimes doesn't), they should be reminded once again of the rules and the division of roles in the group (who is facilitating the meeting and who is taking part in it). One has to react firmly and decisively in relation to such persons, even at the expense of disrupting the dynamics of the group. If the moderator makes light of such a situation and fails to react, the disruptive person will just get worse and any intervention will become more and more difficult as time goes on. Should the moderator have reason to have a stern word, every effort should be made for the comment to be as unthreatening as possible towards the person it is addressed to. Unfortunately, a stern intervention made by the moderator towards one, even the most belligerent and annoying of persons to all, always gives rise to negative feelings across participants and shakes up the dynamics of the group.

Table 7.4 Examples of disruptive behaviours of participants and their handling by the moderator

Disruptive behaviours of participants	*Possible way of handling them by the moderator*
Rambling, off-topic statements	Requesting them to keep to the topic
Personal insults or attacks of other participants	Reminding them of the ground rules, that everyone has a right to their own opinion
Attacking the moderator and undermining their competences	Ignoring such outbursts or having a direct and stern word with the person, reminding them of the division of roles in the group
Attempting to switch roles with the moderator (e.g., turning the questions to the moderator and asking for their opinion on a given topic)	Emphasising the breakdown of roles in the group (reminding them of the subject and nature of the meeting)
Trying to hijack the meeting by putting questions to other participants	Calling the respondents' attention to the division of roles in the group

Withdrawn respondents

Timid and unassertive respondents (reticent and quiet persons who are very wary to speak their mind) or respondents that are withdrawn for any other reason (e.g., because they clearly stand out from the rest of the group) are the exact opposite of dominant or domineering participants. These persons are not actively engaged in the discussion. It is the moderator's task to ease them into the discussion by giving them verbal and non-verbal support and motivating them – sometimes over and over again during the course of the interview – to get them actively involved. In this case, contrary to the treatment of dominant or domineering persons, eye contact between the moderator and the timid participant should be intensified and other non-verbal signals should be sent to prove to them that the moderator is truly interested in what they are saying, using body language or gestures like leaning towards them when they are speaking. Address questions directly to these people, referring to them by their first name. Such persons don't usually respond to questions posed to the group in general, however, when specifically requested to comment, they often have a lot to say and make a valuable contribution to the discussion.

Dealing with different types of group dynamics

Overactive group

Another problem area when conducting focus group interviews can be group dynamics (Forsyth, 1990). The problems match those encountered in the case of "difficult respondents" – the group can be overactive and garrulous, or quiet, and even passive or spiritless. The difference is that this time we are not dealing with the behaviour of an individual but with a group process connected with the dynamics of the group.

If the group is hyperactive and the answers to specific questions are taking up too much time, are full of digressions that aren't always spot on, or when people are talking over one another, the moderator should have no qualms about stepping in and asking them to stop. One can bring up the "stay on the agenda" ground rules (the research respondents are paid for their involvement) and remind everyone that there are still many topics remaining to be covered. This should be done assertively but tactfully so as not to curtail the debate or silence the members of the group. It's

Table 7.5 Examples of moderator interventions stimulating and impeding respondent responses

Interventions stimulating respondents	*Interventions blocking respondents*
Intensified eye contact between the moderator and the participant	Not looking at the person doing the talking (clearly looking away from the person, in another direction)
Leaning towards the speaker	Leaning away from the speaker
Addressing the person by their first name	Giving the person the cold shoulder by not referring to them at all or clearly referring to other people
Reacting to responses with signs of approval (e.g., smile)	Leaving statements without comment
	Glancing at one's watch (ill-mannered but effective)

important to have the right sense/intuition as to when one can step in and interrupt. This should never be done mid-sentence or in the middle of somebody's narrative. It's best to take advantage of natural intervals in the statement (e.g., breath pause, pause for thought) or the moment just before the next person starts to speak. If there is no other option – everyone is talking over everyone else, without any breaks, or completely off-topic – they should simply be interrupted.

If the group has hijacked the meeting and the moderator has lost control of the discussion with everyone talking at once (sometimes it really does come to this!!), there are several ways in which these negative dynamics can be reduced:

- The respondents can be reminded that only one person can talk at a time or that the session is being recorded (which works like a wake-up call).
- They can be given individual tasks (e.g., write something down on a piece of paper) – focusing everyone on their own task, which steers the ensuing discussion towards much calmer waters (at least for some time).
- The moderator can stand up (non-verbal message establishing dominance) and start summing the discussion up making effective use of the whiteboard.

Inactive group/insufficiently active group

The opposite of an overactive group is when the group is too passive and quiet and its participants are not actively engaged in the discussion. Facilitating such groups is gruelling not only for the moderator but also for anyone watching. Looking at the course of such a discussion (which actually is almost non-existent), one gets the impression that every statement took great effort to produce and every opinion had to be painstakingly drawn out of the respondents.

Sometimes the listlessness of the group can clearly be put down to the moderator's behaviour who carelessly and clumsily phrases questions or does something at the very start of the interview to put the whole group completely off him/her. It's often difficult to say what exactly led to such a level of group inactivity. Even the best moderators run across such groups from time to time and the only thing that remains is to try, as far as possible, to get the group going using any of the following ways:

- Addressing questions to specific persons and not to the whole group, referring to respondents by their first name ("Kate, what do you think about this?").
- Setting group work that has to be carried out together (e.g., breaking into smaller groups, where one group will think of all the pros and the other of all the cons).
- The moderator can start doing an activity (e.g., get up and write key points on the whiteboard) – interestingly, this kind of behaviour helps both to calm an overactive group down and to actuate inactive group members.

Individual in-depth interviews

The majority of the skills needed by focus group moderators are also required for individual in-depth interviewers or dyad moderators. As emphasised earlier, despite the similarities between these two research techniques, some moderators are more effective in group interviews than in individual in-depth interviews or dyads. Individual interviews require less skills relating to group processes and dynamics – what counts

more here is inquisitiveness and effective listening skills and the ability to focus on both the subject and the respondents.

Inquisitive and penetrating moderators that dig deep to unearth the required information are better suited for individual in-depth interviews. Such moderators aren't afraid of pursuing an issue and asking a seemingly similar question for the nth time. A good qualitative interviewer conducting real in-depth interviews (individual or diads) is someone who can glean an abundance of information from the respondent and who doesn't back out of deepening the topic upon hearing the respondent say "I don't know" or upon them giving banal or superficial responses.

Types of skills advisable for ethnographic research

The skills that are key to conducting ethnographic studies are the ability to quickly build rapport and establish trust (it is even more important than in focus group interviews). Such a researcher has to be able to go into the homes of people they don't know and carry out various, sometimes strange and unusual tasks, like looking into their bathroom cabinet, asking the person running the house to clean something up, cook something, change the child's nappies, and so forth (Suzuki, Ahluwalia, Mattis, & Quizon, 2005; Wolcott, 2010).

It turns out that persons who have no problem with asking about seemingly strange things with conviction, regardless how ridiculous their request may look, are highly efficient because they know full well why they need this knowledge in the context of the research and in light of the information to be gleaned (Cunliffe & Karunnayake, 2013; Ellis & Bochner, 2011). An example of such a problem might be a study involving looking into the respondent's fridge and taking photos of what was found inside. During this study, one of the moderators reported that the respondents didn't agree to their fridges being viewed and photographed. Interestingly, only one of the moderators – and a very experienced one but in moderating group interviews – came across this problem. After a thorough analysis of her interviews, it turned out that the refusals of the respondents resulted from the manner in which she phrased her request to photograph the inside of their fridges. Since the moderator herself was not at ease with the whole situation and had the sense that she was asking for something inappropriate (crossing lines that should not be crossed in an interview), she asserted this with her body language and non-verbal communication, giving the respondent a lot of leeway to refuse. This was driven by the lack of the moderator's inner conviction that whatever she is doing is really worthwhile and meaningful and absolutely essential in order to gain a deep understanding of the studied issue. In this context, it is no wonder that most respondents refused (for more detailed description see Box 7.16, Case 7.1).

Another key skill which is indispensable in all qualitative research but plays a very important role in ethnographic research is being a keen and sharp observer (Yassour-Borochowitz, 2005). A moderator of an in-home interview not only is required to talk to the respondent and be vigilant of what is said but also has to be an astute observer of the surroundings. In an ethnographic study, this is as equally an important source of information as the interview itself. That's why a perspicacious and sharp-eyed moderator is much more efficient than a moderator mainly focused on the conversation.

When doing an in-home interview, one mustn't forget that this is an exceptional occasion to confront what the respondent is saying about him/herself and his/her life with what their life truly looks like (LeCompte & Goetz, 1982). This kind of

information would never be gleaned in focus group interviews alone. Let's imagine that we're conducting a study on nutrition. A completely different image can be created of the respondent's eating habits based on what is said during a group interview carried out in a focus group facility than compared to what can be observed in their pantry, refrigerator, or kitchen.

Additional skills essential in qualitative research

Active listening: a tool to uphold contact with respondent

Moderation is based on active listening, in other words, listening that encourages responses from the participants. In moderation, it's important to maintain an asymmetry of roles between the leader, who mainly listens, and the participants, whose task it is to speak. The role of the moderator does not consist of passive listening but active and engaged listening (Singh, 2015). They should constantly stimulate respondents to pick up and amass as much information as possible and navigate the discussion so as give everyone in the group equal opportunities, no matter how active or passive they are.

A moderator should also work to maintain good rapport with the respondent. This is much easier to accomplish in individual in-depth interviews or dyads than in focus group interviews where there are always several participants to tend to. Maintaining good contact with the respondent is facilitated by various verbal and non-verbal signals of approval and acceptance, interest, and understanding given by the moderator. Non-verbal active listening cues come from body movements, posture, gestures, and facial expressions. Verbal signals facilitating maintaining rapport in the group or with the respondent which moderators can harness to enhance their performance include paraphrasing, clarifying, following up, and probing. These proactive ways of maintaining contact can be applied both in individual and group interviews. When deploying these techniques, one must endeavour to use these contact-maintaining and discussion-stimulating cues in the right moment and for them to correspond with what is being said by the participants and, most of all, for them to be natural, not forced. It's also important not to overuse these methods or to limit their use to only one throughout an interview. Offering verbal acknowledgement every few seconds like "Yes, I see" or "Uh-huh" and "Mm-hmm" can be very irritating for the speakers and can actually spoil rapport instead of enhancing it.

Following up and probing

From the point of view of qualitative market research, following up and probing is the most important manner of fostering contact and active listening. Probing and follow-up questions to what is being said by the respondents are of great importance in all kinds of qualitative research (Fontana & Frey, 1994). These can be phrased as follows, for instance: "Could you tell us a little bit more about this?", "Is there anything else that you'd like to add?", "Is there anything else that is connected with this?" Effective probing and good follow-up questions require a lot of skill and tact to aptly choose between the statements which are central to the study and which require deepening, and those which can (or even should) be circumnavigated. In a group interview, one must be wary of asking the right follow-up questions so as not to waste too much of

the precious time on one person's response and for the focus group interview not to metamorphose into a series of one-to-one interviews with selected participants.

In an individual interview, probing mainly concerns the statements of a given respondent, while in a group setting, both the individual responses of a specific respondent ("Is there anything else that you'd like to add?") and the group-wide topic can be probed by asking the next persons in the group if they have any additional input on the topic ("What are your experiences in this area?", "Is there anything else that any of you would like to add to the topic?"). Follow-up questions in focus group interviews are of particular importance in the case of respondents that give cryptic or vague comments, avoiding direct answers to the questions posed, by saying things like: "I agree with the rest" or "I think so too". Once this is followed up with them, urge them to give their own, independent answer in their own words, it turns out many a time that their opinion is not at all like the others in the group. Thus, following up and probing is also essential when people use mental shortcuts and, assuming that the listener understands them, leave a lot of things unsaid.

Clarification

Clarification is used to get to the gist of the statement by asking the speaker to make a given issue more precise, to succinctly give across the crux of the matter. Clarification is used to explain any inaccuracies or inconsistencies in the statement and to make sure that everything that has been said has been accurately understood by the moderator. Examples of clarifying statements include: "Could you explain this to me/say this again?", "Could you put this differently . . .?"

Paraphrasing

Paraphrasing is a very good way of maintaining contact with the talker and is used when it seems that the respondent doesn't know what else they would like to say. Paraphrasing consists of briefly rephrasing the ideas of the speaker. It is not, however,

Table 7.6 Examples of questions stimulating more elaborate responses

Follow-up questions addressed to speaker	*Follow-up questions addressed to remaining participants*
"Could you give us an example of what you are talking about?"	"What is the opinion of the remaining members of the group on this?"
"Could you tell us a little bit more about this topic?"	"Kate, what about you, what do you think about this?"
"Is there anything else that you could add to this?"	"What do the other group members think about this?"
"I'm not sure I understand, could you specify what you mean by this?"	"I can see that some of you are nodding your heads. Is there anything else that you could add to the conversation?"
"Could you please repeat what you just told us?"	"Does anyone else think differently perhaps?"

an interpretation of the statement but merely its rewording by the listener in their own words. Paraphrasing facilitates committing the content of the conversation to the moderator's memory and, above all, helps avoid misunderstandings. If we repeat what our interlocutor has said in our own words and get something wrong, the respondent should correct us and explain what she/he meant. In focus group interviews, paraphrasing can be deployed in relation to extended statements of one participant as well as to sum up the responses of several persons. Examples of signal phrases introducing paraphrasing: "From what you said, I understand that . . .", "So, you mean . . .", "You said that . . ., is that right?"

Non-verbal communication: a tool uncovering more

Moderators often forget that it's not just the respondents that are sending out non-verbal signals but that they too are doing this as the person running the interview. Every interview consists of an interaction between the moderator and the respondent(s). Hence, the moderators should be able to skilfully read the non-verbal cues of the respondents and expertly control their own communication. The non-verbal signals sent out by the moderator are read (usually on the unconscious level) by the respondents and can either help them or be a barrier to building rapport with them. A good moderator can, first, control his/her non-verbal communication: their posture, the way they're sitting, the intensity of eye contact, signals expressing approval or disapproval (which should not be correlated with statements in line with moderator expectations). Second, they can deftly use them to put the discussion on the right trail, maintain eye contact, and support and encourage shy and reticent persons while minimising contact with dominant and domineering participants. Third, they can read the non-verbal cues of the participants and interpret them correctly (here, sensitivity to verbal and non-verbal inconsistencies is of particular importance).

Box 7.15

It's crucial to be sensitive to various kinds of consistency (and especially inconsistency) when conducting qualitative interviews. First of all, to the discrepancies between the verbal level (what the respondent says) and the non-verbal level (e.g., a grimace as a sign of discontent). Second, to the discrepancies between what a person says over time, at different moments in the course of the interview. If this is observed, clarification is required.

Of course, the role of non-verbal communication in qualitative marketing research should not be overestimated. Non-verbal communication can complement the information gleaned but should never be treated as the sole information source. It should be interpreted very cautiously as its meaning largely depends on the context and the individual differences between people. No non-verbal message can be unequivocally interpreted with 100% certainty in isolation from a specific context. For example, being red in the face is usually an indication of negative excitement: anxiety or shame. Nevertheless, this does not always have to be the case; a person may have a flushed

face because of positive excitement. When interpreting non-verbal cues, one must never forget that every person has their own, initial behaviour, gestures, and voice intensity, etc. That's why we can only make inferences by comparing a given behaviour to the initial state of a person, which is characteristic of them.

When conducting focus group interviews, being tuned in to catch any inconsistencies in statements is highly useful. This is important because oftentimes the subjects of focus group interviews are issues in which social perception is important (e.g., reasons for using products or brands) or even concerning socially unacceptable issues (although this is more common in focus group interviews concerning social problems rather than commercial ones). In such cases, an interview participant may refashion her/his answers (consciously or unconsciously) to be as consistent with the views of the group as possible. However, regardless of how aware the person is that they are saying things which are incorrect or misleading, their body usually gives away cues showing the inconsistency between their verbal statement and their actual feelings, and a seasoned moderator will be able to catch this dissonance out.

There can be two levels of inconsistency in the flow of the interview: (a) between the verbal and non-verbal level (the content of the statement and the intonation, facial expressions, and gestures), and (b) between the statements of the same person over time. If somebody says that they "like something" and hesitation can be heard in their voice or their facial expressions convey doubt, we have an evident inconsistency between the verbal and non-verbal cue. Such an inconsistency calls for a reaction on the part of the moderator by asking for further clarification. If, however, we notice inconsistencies between different statements of the same person, one should first consider the root cause of this and, only once we have done this to no avail, one can follow up on it. Caution is needed in such cases so as not to give the person the impression that we are trying to control them by following up on inconsistencies, demonstrating to them how they have gone back on what they said earlier. Thus, if we cannot find the reason for the discrepancy on our own, it's usually best to give up on pursuing the

Table 7.7 Most common forms of non-verbal signals conveyed by moderators and examples of how they can be interpreted

Signals	*Interpretation*
Head nodding in agreement	Sign of approval, encouraging the respondent to keep talking
Murmurs of agreement like "Uh-huh" and "Mm-hmm"	Sign of approval
Facial expressions, smiles	Maintaining contact, "I'm listening to you carefully"
Looking in the speaker's direction	Maintaining contact, encouraging participants to comment
Raising the eyebrows	Expressing surprise, astonishment, query
Extending a supinated palm towards a person	Encouragement to start speaking: "Your turn . . ."
Uplifted palms	"We have a problem", "What can we do?"
Leaning on the table	"I'm interested", "Tell me more"
Leaning away from the table, leaning on a chair	"Please continue, I'm listening carefully", but also "I'm not interested", "I don't agree with what you just said"

matter so as not to create a threatening atmosphere or make the participants anxious or uncomfortable.

Non-verbal cues are, undoubtedly, a valuable source of information for the moderator; if, however, they slip out of the moderator's control, they may well become a driver of disruption of group processes and the source of informational errors. One must be particularly on the lookout for approval or disapproval signals like head nodding and markers of agreement like "Uh-huh" and "Mm-hmm". The speaker will unconsciously pick the listener's signals up in an instant and will modify his/her response accordingly. These cues act as enhancers and make the speaker talk about topics associated with signs of approval while omitting those linked with disapproval. Both parties are usually oblivious of the entire process as it usually happens on the level of the unconscious.

Six major mistakes in moderation

Mistake 1: only moving in the realm of the rational declarations of the participants

It would be wrong to only move in the area of the rational and conscious opinions of the participants during a discussion because people are not always aware of the real reasons underpinning their behaviour and their decisions (cf. Chapter 2). However, the appropriate questions (and projective techniques used) can help reach the less conscious and less rational areas of a person that are often the drivers of their behaviour and of their consumer choices.

Mistake 2: collecting opinions without attempting to get to their root cause

Focusing solely on collecting opinions in the study (e.g., "I like this commercial", "I don't like this brand") without even trying to understand the causes (without trying to get to the bottom of the reasons behind their commercial or brand preferences) is a common mistake made by inexperienced moderators. An interview where opinions alone are collected without uncovering the factors behind them, dismally failing to answer the critical questions of "Why?" and "What does this mean?", is largely a wasted interview because such information is only descriptive in nature, devoid of any unravelment or clarification. This is also why such interviews have little to no impact on marketing actions.

Mistake 3: "questionnaire" type of interview

A common mistake made by many beginner moderators is facilitating a group interview by asking each and every participant the very same question and expecting them all to answer every single question that is posed. Such polling of all the participants on every issue can completely prevent interaction between the participants, block the dynamics, and derail the group process. If we have the respondents answering the moderator's questions instead of actively engaging in a discussion between themselves, we are losing a large portion of significant data that may only surface in confrontation between divergent opinions. This may also result from clinging too tightly to scripted questions. Not only can this lead to completely preventing a free and open discussion from taking place but also to an unnatural transition from topic to topic.

Mistake 4: inability to control the group

Novice moderators often cannot control the group or navigate the discussion without blocking it altogether. They are not able to keep the respondents on track with the aim of the meeting, they allow unnecessary digressions or drifting off the topic onto non-meaningful issues. Moderators who have no command over the group tend to let the interviews run overtime without good reason and spend too much time on the introductory remarks and topics serving only as a warm-up for the study, consequently, not having enough time to discuss the important issues from the point of view of the research goals. Difficulty in retaining control over the interview process is also manifest in allowing one or two participants to dominate the group and the same persons to always answer the questions put to the group first, imposing their opinions on the rest of the group members. An adept and experienced moderator will be able to redress these disparities between the activity of the participants: encouraging the inactive ones to take a more sprightly approach and be more engaged in the discussion, and to curb the domination of the leaders.

Mistake 5: dominating over the group

The opposite of lack of control is being overly controlling of the group. Such a moderator often behaves like a teacher doing a question and answer drill, always expecting to get the right answer to the questions posed by him/her. Creating such an atmosphere makes the respondents closed to sharing their actual feelings and impressions and focuses them only on finding an answer that will appease the moderator. In such a group, discussion and interaction between the moderator and the participants are non-existent and the moderator clearly is the central figure of the meeting.

Mistake 6: being a participant instead of a moderator

Some moderators are wrong in thinking that sharing one's own opinions with the participants will help bring them close to each other and build better rapport. Unfortunately, moderators sharing their own viewpoints and giving them a model to follow usually derail the meetings and drag the productivity of the meetings right down, narrowing down the groups' explorations and subduing their responses. In qualitative marketing research it's very important to maintain the asymmetry of the researcher-respondent roles. Both sides have a different part to play and these roles should not be confused. The moderator is tasked with asking questions, probing, and navigating the discussion, but they are not meant to be one of the respondents (i.e., they should refrain from divulging their own views and opinions), whereas the respondents, conversely, are required to share their opinions, thoughts and reflections, emotions, and impressions, but not to facilitate the meeting or to directly influence the scope of the topics discussed or the flow of the interview.

Box 7.16

CASE 7.1 How to ask awkward questions?

A large ethnographic marketing study needed as many as six moderators at the same time. The aim of the interviews was to understand eating habits, hence,

one of the interview elements was taking snapshots of the contents of the respondent's fridge and discussing why the given respondent uses these specific products and brands and not others. One of the moderators, a psychologist with a doctor's degree, with extensive experience in qualitative research but with no ethnographic study experience, joined the team. This moderator reported a certain problem after the very first interview, namely, that the respondents refused to show the contents of their fridges (other moderators had no issues whatsoever with this). When the same problem cropped up in the second interview, the researcher responsible for the study listened to a recording of the interview conducted by this moderator, paying particular attention to the way in which this moderator introduced this task. It turned out that this moderator had a strong sense that she was asking for something improper and this was evident both in the way that she phrased her request as well as in her non-verbal communication. The moderator's exact words were:

> Now, I'm going to move on to a rather strange part of our interview. I'm very sorry that I have to ask you to do this, and it wouldn't surprise me if you refused, but could we go into your kitchen and have a look inside your fridge to see what you have there?

Such an introduction clearly resulted in a refusal on the part of the respondent – even though they may not have perceived showing the contents of their fridge as anything personal prior to that – as the mere fact of such an introduction may very well have compelled them to refuse.

This example shows how important the inner conviction of the moderator is for the effectiveness of the information gleaned from the interviews, in terms of whether a given question or task is truly important for the study and if the moderator is fully entitled to ask it. The respondents will sense any indecision and lack of conviction, which will often lead to a failure in collecting the sought-after information.

Source: Maison&Partners

Box 7.17

CASE 7.2 Critical observation: a very important tool to help the moderator to understand much more than the respondent verbalises

Observation is an incredibly important tool in the hands of a qualitative researcher, which can help her/him understand the true meaning of what the respondent is saying during interviews. One such example is an ethnographic study that complemented and deepened an earlier, very large segmentation study on a nationwide representative sample. One of the research objectives was understanding the role of the family in each of the segments in order to fine-tune the communication strategies used. The quantitative part failed to

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reveal any differences in these terms between the two segments – over 90% of respondents (in both segments) declared that family was most important for them. A completely different picture was unveiled by the qualitative ethnographic study that was carried out, especially through observing how the home was furnished and what objects are displayed as important. The segments with clearly collectivistic characteristics, truly valuing the family, always had a place in their home where all the family members could meet and enjoy each other's company. These persons also pointed out the important places in their home as being associated with contact with other family members living there ("this is the table where we always eat supper together", "this is the couch where we always sit in the evenings and share what our day was like"). A completely different picture was revealed by the homes of the segments with a clearly individualistic orientation for whom the family was less important (despite their declarations to the contrary). There usually was no place in the homes of these people that was specifically set aside for family gatherings and, even if there was, they rarely spent time together there. The objects that were indicated as important in these homes were usually tangible goods, not connected with interactions between the household members ("this is our new TV; we finally managed to buy such a large one", "these are my dream kitchen equipment and appliances, I've always longed to have them").

Source: Maison&Partners

Exercise 7.1

Split into groups of three, where one person will play the role of the respondent, the other will conduct the interview, and the third person will observe. Carry out a 10-minute interview about "Favourite ways to spend my free time". Before the interview begins, the person who will facilitate the interview should prepare the main topics that they would like to discuss with the respondent.

When running the interview, the observer should watch and take notes on how the person conducting the interview and the respondent behaves (non-verbal communication). The observers should analyse the interview in order to later give feedback on the following matters:

- The interview content: did the person facilitating the interview obtain information about the topic of the interview? Were some important issues omitted?
- The way the interview was conducted: did the person running the interview dynamite the course of the interview or hold it up?
- Interview facilitation skills: did the interviewer listen and follow what the respondent was saying? Did they probe at specific points in time and did they do so in an appropriate manner?
- Non-verbal communication of both the respondent and the interviewer.
- Atmosphere of the interview (friendly, hostile, calm, nervous, etc.).
- Emotions accompanying the interview – emotions of the person facilitating the interview as well as the respondent.

Exercise 7.2

Split into pairs where one person will play the role of the respondent and the other will carry out the interview (taking turns). Conduct two 10-minute interviews on any topic of your choice (e.g., "How do I imagine myself in ten years' time?"), where you take it in turns to be the respondent. The interviewee's task is to be a reticent and withdrawn respondent, reluctant to speak and very vague, from whom the information has to be drawn out. It is down to the person facilitating the interview to extract as much information as possible using appropriate interview tools and enabling techniques (e.g., deepening, asking follow-up questions, paraphrasing, and clarifying).

Once you have completed this exercise, consider (from both perspectives: the respondent's and the facilitator's) what had an encouraging effect on the interview and what other things could have been introduced in the interview in order to help reduce the hostility of the respondent.

Exercise 7.3

Just like before, split into pairs where one person will play the role of the respondent and the other will carry out the interview (taking turns). Carry out two 10-minute interviews on any topic of your choice (e.g., "The way I approach ecology and pro-environmental behaviour"), where you take it in turns to be the respondent. Now, the interviewee's task is to be a talkative respondent who wants to dominate the conversation, is eager to speak but often not about the topic in question, straying from the main topic, failing to answer the questions of the interviewer. It is down to the person facilitating the interview to extract as much information as possible using appropriate interview tools (e.g., deepening, asking follow-up questions, paraphrasing, and clarifying).

Once you have completed this exercise, consider (from both perspectives: the respondent's and the facilitator's) what contributed to giving the interview a certain order and to the facilitator taking control over the respondent, which of the interventions taken by the interviewer led to the respondent giving the sought-after information.

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8 Step 4: analysing and interpreting qualitative data

Why qualitative data analysis is difficult

The analysis and interpretation of the findings of qualitative marketing research is a very important stage in the research process, on which the quality of the conducted study largely depends (Dey, 1993; Miles & Huberman, 1994; Neale & West, 2015; O'Brien, Harris, Beckman, Reed, & Cook, 2014; Silverman, 2001). It is regrettable that so little time and attention is dedicated to the interpretation of results in many research agencies. This is largely down to the constant hurry accompanying marketing research. There often is simply not enough time for proper analysis in research firms, where one more day would often be sufficient to thoroughly think things through, consider things further, take a breath, and look at the findings in the right perspective, so as to ultimately draw firm and final conclusions. Therefore, the analysis of results sometimes takes on a descriptive form of what happened during the interviews, lacking an exhaustive and penetrating qualitative analysis extending beyond the declarations of the respondents and deprived of a global perspective on the results in a broader knowledge and marketing problem context.

Beginner qualitative marketing researchers often find it very difficult to get a grasp of the specificity of qualitative data analysis, which is, in fact, also very difficult to explain. The difference between quantitative and qualitative analysis is like the disparity between analysing numbers and analysing the meaning of words. When analysing numbers, regardless of who is doing the analysis, it's enough to keep to some basic rules of arithmetic in order to always obtain the same results. An analysis of numbers has established and fixed rules, which is why 20 is always greater than 19, 19 is always greater than 18, and so on, and so forth. The situation with analysis of meanings is completely different. Two people can draw very different conclusions based on the same information available. For one person, the word "sun" may sound pleasant because of its association with summer vacations and leisure, whilst for another, it may have negative connotations since it reminds them of sunburn and drought.

Box 8.1

A good qualitative researcher is one who isn't afraid of quantitative research, knows it, and understands it. Thanks to this, they opt for qualitative methods since they are the most appropriate to investigate a given problem and not because they don't know or understand quantitative methods or are scared of statistics.

Qualitative analysis is very demanding and clear rules as to how qualitative data should be analysed are also challenging to devise (Ereaut, 2002; Levitt *et al*., 2018; Levitt, Motulsky, Wertz, Morrow, & Ponterotto, 2017). This is probably why most practical books on qualitative marketing research avoid the data analysis issue or give it somewhat laconic treatment, wrapping the entire topic up in a few sentences. Hence, the only true way to learn and master this specific kind of analysis is through personal experience, preferably under the tutelage of an experienced researcher (Ereaut, 2002). The fact that there are difficulties in phrasing the rules governing the interpretation and analysis of qualitative data does not mean, of course, that no such rules exist. There are numerous publications, particularly academic ones, that are available (although still much less than quantitative data analysis literature), which can also assist in the analysis and interpretation of qualitative marketing research (Dey, 1993; Miles & Huberman, 1984). They propound a very systematic, time-consuming approach. The analyses that are encountered are usually based on a particular theory (Eriksson & Kovalainen, 2015; Myers, 2013), e.g., grounded theory (Glaser, 2001; Glaser & Straus, 1967; Straus & Corbin, 1998), narrative research (Polkinghorne, 1995), or discourse theory (Wetherell, Taylor, & Yates, 2001). In marketing research, contrary to scientific research, the predication of analyses to specific theories is unnecessary and the analysis does not have to be performed so precisely and systematically as in the case of academic research (Ereaut, 2002).

Box 8.2

There are less clear and explicit rules that must be followed when it comes to analysing qualitative data compared to quantitative data. Qualitative analysis is largely based on the researcher's experience and usually leaves lots of room for different interpretations, which is why the conclusions drawn from qualitative research are highly complex. This wealth of conclusions and interpretations of the results of qualitative research is its unquestionable advantage but it also carries a certain risk of overinterpretation and drawing the wrong conclusions.

The time-consuming manner of analysis deployed in qualitative research has led researchers to seek out computer-assisted qualitative data analysis software to facilitate the entire process (Dey, 1993; Fielding & Lee, 1991). The market is now rife with such software like QSR N6, MAXQDA, ATLAS.ti, etc. These programs are oriented mostly to coding, cataloguing, and advanced search functionalities of earlier encoded parts of the interview, thanks to which the time allocated to this qualitative data compilation phase is shortened. The computer analysis of qualitative data is not akin to the analysis of quantitative data – these programs handle the organisation, arrangement, and searching of data and undoubtedly accelerate work but the proper analysis and interpretation of results still rests with the researcher. Thus, the expression "qualitative data analysis software" is a certain simplification and can even be regarded as a misrepresentation. A computer may be an aid but can never replace a researcher because the global picture of the outcomes is critical in the analysis of qualitative data and one of the most important things is an openness of mind to a plethora of possible interpretations (Dey, 1993). Qualitative analysis in commercial research is largely based on intuition

and bolstered by experience, which is why sometimes a researcher can be certain of the veracity of the conclusions drawn by him/her yet find it difficult to explain and logically justify precisely why such a conclusion was drawn (Ereaut, 2002).

Box 8.3

Qualitative analysis is largely based on intuition bolstered by experience, which is why sometimes a researcher can be certain of the veracity of the conclusions drawn by him/her yet find it difficult to explain and logically justify precisely why they drew such a conclusion.

A qualitative analysis, irrespective of whether or not it was performed entirely by a human or was computer assisted, always requires time (Krueger, 1998; Kuckartz, 2014). The time dedicated to the analysis and preparation of reports is reduced as the moderator acquires greater experience and mastery, but a good and thorough analysis and write up of a sound report nevertheless requires the appropriate amount of time to be dedicated to it. Exactly how much time should be given to the analysis, interpretation, and preparation of reports from qualitative research depends primarily on the moderator's experience and on whether or not the author of the report is also a moderator. Conducting at least some of the interviews clearly cuts short the time required to analyse and interpret the results. The time needed to process the outcomes also hinges on how many interviews the study comprises. If there are many interviews with more starting material to trace and organise, the analysis will take more time. Exactly how much time this phase will take depends on the variety of topics discussed in given interviews and the diversity of the groups with which interviews are conducted. The preparation of a report based on a six focus group interview study on adult drinking habits conducted with the participation of similar respondents (e.g., beer drinkers) and using the same interview guide is much easier to prepare than a report from a study of the same size but performed with a variety of different groups (e.g., beer drinkers, wine enthusiasts, and spirits connoisseurs).

Box 8.4

The analysis of the results in genuine, truly in-depth qualitative research where endeavours are made to reach what is unconscious and what is not spoken directly, has to take time. In such research, the thorough analysis of the results and write up of a reliable report takes about two weeks and is simply impossible to achieve in two days.

Qualitative data analysis framework

There are four different stages in qualitative data analysis (Krueger, 1998) (see Figure 8.1). The first stage involves the correct preparation of data. In qualitative interviews (focus group interviews, dyads, individual in-depth interviews, etc.) this

usually requires verbatim transcription of the course of the interviews. Some research firms do not transcribe interviews, in which case the person responsible for drafting the report goes through all the recorded interviews and prepares a report on their basis. I personally am against this kind of approach as it hinders gaining a concise overview of the results and prevents going back to certain threads at will, making the whole process more cursory and superficial. If we have a transcription (or at least accurate notes) from the entire course of the interview, we can refer back to specific statements across the interview groups. We can then compare the information gleaned from relevant groups and at different moments in the interview course. Preparing a report directly from video recordings is much more time-consuming than working with transcriptions. Although we have to admit that when working on transcripts to process the results (without watching the course of the discussion), we are, undoubtedly, losing a lot of subtle information that could prove useful or sometimes even fundamental to the analysis, such as the intonation, non-verbal communication (gestures, facial expressions, body language), etc. In the case of group interviews, the lack of information about the authors of specific statements (which may be of significance in the analysis) does pose certain difficulties with analysis based on transcripts alone. For this reason, as mentioned earlier, it's imperative that the person writing the report conduct or at least watch some of the interviews.

One of the problems of qualitative research is the large volume of data that has to be processed, which is why starting out moderators are often overwhelmed by the large volumes of transcripts from several focus group interviews or twenty or so individual in-depth interviews and are at a loss as to where to start the analysis. One of the ways to reduce the vast amount of data is to select the content in line with the research questions (*cut-and-paste technique* – Stewart & Shamdasani, 1990). The first task is to sort through the data, rejecting the fragments that are not linked to the research agenda (which inevitably always crop up during an interview). Next, the material should be categorised according to the problems corresponding to the research goals (Belk, Fischer, & Kozinets, 2013; Dey, 1993; Ereaut, 2002). Then, the researcher should look for the interrelations between different themes covered in the interview and try to find their meanings for the investigated issues (similar to thematic analysis applied in psychology, Braun & Clarke, 2006).

Content categorisation can be done in a number of different ways, for instance, by highlighting the meaningful categories under each research question using colour codes.

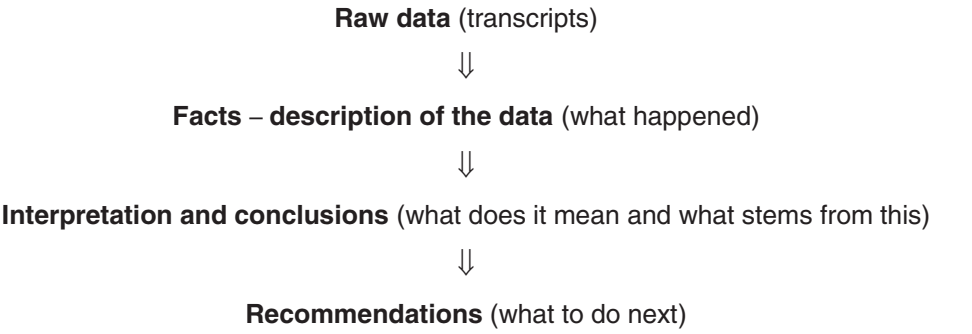

Figure 8.1 Four main stages in the analysis of qualitative research findings.

This facilitates navigation through the relevant fragments once on the analysis stage of a given topic. Another computer-assisted approach that is highly recommended is sorting through the fragments that match the relevant topics and putting them in order using tables, which can later be printed up. I personally am a strong advocate of working on research material which has been sorted and categorised in this way, with all the unnecessary content being carefully sifted out (data reduction). Such processing of the research material in order to prepare it for further analysis can be done by the researcher's assistant, leaving the researcher free to focus his/her efforts and attention on a more advanced, probing, and in-depth analysis. The researcher, through the very fact of facilitating the interviews, will find it easier to pick out any recurrent items across the groups as well as the differences between them. They may, for instance, notice that the users of brand A speak differently of the category, which may signify that they have a different emotional connection with the brand, which has a disparate meaning to them compared to the others (e.g., more hedonistic approach), than users of brand B (e.g., more functional angle). The interrelation between specific parts of the interview can also be picked up, for example, that the connection with a given brand is linked to a specific approach to life.

The next step is to set to work on the final report, where the first thing to do is to describe what happened (present the facts), then move on to the level of interpretation of results, and finally to drawing the conclusions from the research. Many aspirant qualitative researchers find it very difficult to distinguish the description of results from their interpretation. Such reports tend to lack interpretation and give the impression that the interpretation and the drawing of conclusions has been left to the reader (client). If the question of "What actually results from this?" keeps on cropping up while reading the report and no answers to this can be found within its pages, it means that the report is missing this layer of analysis and interpretation. The reverse situation, where the conclusions are too far-reaching and illegitimate from the point of view of the data supplied, is also uncalled for. A good report should contain both a description and an interpretation of the findings and this distinction between them (what the respondents actually said vs. what the researcher brought to the report) should be very clear to the reader.

Box 8.5

A good report should contain both a description and an interpretation of the findings. But the distinction between where the description of the results (i.e., what the respondents said) ends and the interpretation (i.e., the researcher's input) begins should be very clear and unequivocal.

The disparity between the description of the data and their interpretation is oftentimes difficult to explain and not always crystal clear. Theoretically, the interpretation is an additional explanation, clarification, or commentary to the presented findings. The interpretation should be centred on explaining the reasons for the results obtained and facilitate understanding of their meaning and significance. When presenting the results, we are limited to the facts only, for instance, that according to the participants,

the most frequently purchased products influenced by advertising are cosmetics, toiletries, and cleaning products. In the interpretation, however, we should relate to given interjections and comments and present them in a broader context, for instance, by pointing out that, for one thing, these are also the most frequently advertised products; two, since the study itself concerned the use of toiletries and cleaning products, their mention can most of all result from the topic of the study. A report narrowed down to the coverage of the interview and what was said therein without any interpretation of the findings is, without question, a bad report (Ereaut, 2002). The data should be sorted, coded, and commented on.

Box 8.6

The interpretation is an additional explanation, clarification, or commentary to the presented findings and it should be centred on explaining the reasons for the observed phenomena and facilitate understanding of their meaning and significance.

The next and last step of the analysis process is a discussion and interpretation of results, drawing of conclusions and – if called for – the formulation of recommendations. The part of the report referred to as the discussion of results should entail information on novel and unexpected items that appeared in the study and the differences observed across groups. The most difficult part of this analysis is the articulation of recommendations, which should go beyond the description and interpretation of results. These recommendations give an indication of which steps should be taken next by the client based on the research outcomes and be firmly rooted in a broad marketing perspective. Researchers from research agencies may not always be equipped enough to give valid and well-founded recommendations because of not being familiar enough with the marketing foundations of the study. Because of this, research agency staff should think twice before proffering any categorical recommendations the likes of "bring product A to the market", "go into positioning product B in a set direction", or "bring products with flavours A and B to the market" if they have limited access to the internal data of the company and an overview of the business goals of the client. Imagine a study where the research goal is to select a product positioning concept. The researcher, based on the results, may recommend the one which evoked most favourable reactions, had the greatest positive emotion appeal, and created the best product image. However, it may turn out that this is not a good recommendation at all because chosen positioning is too similar to the positioning of another product of the same manufacturer present on the market. As a consequence, introducing a new product with the same positioning could lead to cannibalisation. That's why, if the researcher is not abreast of the entire business and marketing context and the strategic corporate goals, they will usually not be capable of identifying the single best business direction to take based on the study results alone (but they may be able to single out the ones with the largest and smallest potential – see Chapter 1).

Box 8.7

If a researcher is not abreast of the entire business and marketing context and the strategic corporate goals, they will usually not be capable of formulating good marketing recommendations and identifying the best direction for the client to take.

The recommendations are usually (if at all) placed at the beginning of the report, together with the executive summary of the findings and conclusions, but before the detailed presentation of outcomes, even though they are actually written right at the very end, once the whole description and analysis of results process is complete. Despite the fact that the conclusions and recommendations take up a very small amount of space in the report (three–four pages), special care and attention should be paid to their preparation (Dey, 1993; Rabiee, 2004; Sandelowski & Leeman, 2012). Unfortunately, in marketing practice, there usually is not enough time left for this part of the report. Most researchers forget that the conclusions and recommendations are the hallmarks of the research agency because the head of the client's company usually only reads this part and builds his/her image of the research agency and assesses the quality of the service performed based on this alone.

Box 8.8

Most researchers forget that the conclusions and recommendations are the hallmarks of the research agency because the head of the client's company usually only reads this part (being pressed for time) and builds his/her image of the research agency and assesses the quality of the service performed based on this alone.

Singling out meaningful statements (expressing the respondent's genuine views or feelings) from less meaningful and insignificant content (off-topic or resulting from reproduced, stereotypic views) is also a challenge for most budding moderators. The first encounter with writing up a qualitative research report is usually an overwhelming experience because of not knowing how to sort through the information or separate the meaningful from the trivial issues, as everything seems to be highly relevant. The ability to sift through and distinguish meaningful from less important information is acquired with experience gained. In every interview, there are statements and interjections that do not carry meaningful information. Of course, this is where the question of how to tell meaningful content apart from the trivial appears. One of the distinguishing features of the meaningfulness of a given statement for a respondent is how it is phrased, whether as a first person "I" statement, or using "one" – the third-person singular pronoun. Generally, the rule of the thumb is that first-person narratives are more significant than third-person

statements. Let's say the following two statements were made: "Whenever there's a commercial break, I usually switch channels" and "Whenever there's a commercial break, one usually changes channels". In the first remark, it is more likely that the person themselves is actually doing this. In the second instance, it's probable that the assertion reflects the belief held by the respondent, that this is how one should react to advertising, which does not mean that this is how he/she actually reacts to commercial blocks.

Box 8.9

One thing that qualitative research is often criticised for is the subjectivity of the data analysis. However, this should not be treated as a flaw but rather a specificity of this method, which one should not lose sight of to ensure that its impact on the analysis process could be reduced to a minimum. Throughout the entire course of the analysis, self-criticism towards the conclusions drawn by the researcher and a constant search for alternative explanations for the observed events are also paramount.

One thing that qualitative research is often criticised for is the subjectivity of the data analysis. This should, however, be treated as the specificity of this approach rather than its flaw or shortcoming. A researcher approaching qualitative data analysis should be well aware that the person analysing the qualitative data can, unconsciously, influence the pattern of results obtained. This is a specific characteristic of human perception, which always is selective and subjected to the cognitive structures, emotions, and the values held by a person. People have a natural tendency to listen to what confirms and upholds their convictions and mind-sets, and avoid (reject) information that could upturn them or make a dent in them. Researchers are by no means exempt from this characteristic of human information processing which can, unfortunately, lead to errors in analysis (Paterson, Thorne, Canam, & Jillings, 2001). That being said, the difference between good researchers and mediocre ones is precisely the ability to break away from personal convictions, emotions, and worldview in order to correct these cognitive flaws and carry out the analysis as objectively as possible. Thus, the open- and nimble-mindedness of the researcher is also crucial to the quality of the analyses performed (and countering selective perception). Throughout the entire course of the analysis, self-criticism towards the conclusions drawn by the researcher and a constant search for alternative explanations for the observed events are also paramount (Payne & Williams, 2005). Ideally, the same research materials should be analysed by two independent but equally proficient and experienced researchers and then verified based on the conclusions drawn. Unfortunately, this is rarely the case in practice, mainly due to time and financial constraints. There are cases, however, where researchers work in pairs, discussing the conclusions drawn there and then, which can have a positive impact on the quality of the final report.

Box 8.10

Characteristics of qualitative data analysis

Qualitative data analysis should be:

- **systematic;**
- centered on the **goals** of the study;
- containing both a description of the data and their **interpretation;**
- **internally valid –** based on the same data set the same conclusions should be reached by independent researchers;
- **externally valid –** the conclusions reached by the researcher must reflect the reality and cannot portray a false picture of it;
- **reliable –** should take into account all the data and not be vitiated by the slightest error.

Box 8.11

A good qualitative analysis is such where, based on the same data, another accomplished researcher would reach the same conclusions as the first researcher.

Types of qualitative marketing research results presentation

The analysis of qualitative interview outcomes usually leads to a report of the study. However, the end result of qualitative research is not always (and not only) a final research report. Various levels of data analysis and, consistently, different ways of expounding the findings can be encountered in qualitative research practice (Krueger, 1998; Mariampolski, 2001; Wu, Thompson, Aroian, McQuaid, & Deatrick, 2016). The most common include: debrief; top-lines – 2–3 pages in Word; a final written report – 30–40 pages (now mainly in PowerPoint); and an oral presentation of results (see Table 8.1). Exactly which of these forms will end up as the final effect of the study depends mainly on the expectations of the client as they are free to request any given form or combination of forms of their liking.

The debrief is an oral executive summary of the findings, which immediately follows the completion of the research. The debriefing goals are to get right to the substance of the main outcomes and to confront the moderator's impressions with the impressions of the client watching the interviews. Such meetings may last from half to even several hours. Efficacious participation in a debriefing on the part of the moderator requires considerable knowledge and experience from them. It necessitates a global perspective on the information gleaned, swift formulation of accurate conclusions, a flair for translating observations into marketing thinking and relating them to the research questions and the client's needs and requirements. After several hours of interview

Table 8.1 Types of presentation of qualitative research results, their characteristics and data sources

Type of presentation of results	*Characteristics of given form of presentation of final results*	*Person analysing, interpreting, and writing up the results*	*Data source*
Debrief	• Set of the moderator's "first impressions" formulated immediately after the interviews • Affected by errors • No verbatims • Oral presentation of impressions	• Moderator and/or qualitative researcher	• Memory
Top-lines	• Set of the moderator's "first impressions" formulated 1–2 days after the interviews are finished • Affected by errors • Some verbatims possible (but not essential; only if notes were taken) • No illustrations • Written presentation (usually in Word)	• Moderator or qualitative researcher	• Memory • Notes (if taken)
Proper report	• In-depth analysis of data from the interview (transcriptions) • Supplemented by analysis of non-verbal communication and projective techniques applied • Complete with graphics – illustrations • Global interpretation of results – reinforced with interpretations and conclusions (possibly also recommendations)	• Final analysis: moderator or qualitative researcher • Initial data preparation: researcher's assistant	• Interview transcription • Possible tables presenting results or computer-assisted analysis of material • Sometimes video recordings – not recommended
Oral presentation of results	• Cohesive summary of thoroughly and extensively analysed results • Complete with conclusions • Complete with recommendations (in writing or presented orally during the discussion)	• Moderator or qualitative researcher • Sometimes person in charge of client accounts	• Report

facilitation, the moderator has to be at the ready to spend another 1–2 hours of intense thinking to synthesise the findings and draw firm conclusions on the spot. Not every moderator is cut out to meet such a challenge successfully. Thus, whenever debriefing is an important element of the research process for a client, not only the ability to successfully facilitate a group but also the knack to take active part in debriefing, is indicative of the quality and mastership of the moderator.

Occasionally – although this happens seldom – a written final report of the research is not required. In such a case, the analysis and conclusions are limited to an oral executive summary directly after the completion of the research. This may be the case when there is a client with extensive experience in qualitative research who is also actively involved in the research process (e.g., observing all interviews). Another situation is when firm and quick marketing decisions have to be made just after the fieldwork (e.g., choosing one advertisement version over another or setting the product positioning direction). Conducting a multinational qualitative study with interviews being held in different countries is another situation when final reports in each country are often not required. The research in specific countries ends up usually as an extended debrief or executive summary with only one final report being compiled by the researcher from the coordinating country.

Box 8.12

Examples of questions discussed during a debrief

- What are the most significant findings in this study?
- How does the information gleaned hold up to the expectations/forecasts/hypotheses?
- Has any unexpected information cropped up? What surprised you? Did anything unexpected appear?
- What differences are there between the information obtained from one group compared against the other groups?
- Should we/can we change anything in the interview guide for the next groups to come in this study to gain a better understanding of the researched issues?
- Which of this information should be included in the final report? What should we pay particular attention to in the analysis?
- What should we pay particular attention to in upcoming interviews?

A top-line is a somewhat more advanced form of elaboration of results and consists in a written summary of the main results, which are prepared one–two days after the study. In this case, the moderator has slightly more time than in a debriefing to consider and think over the study conclusions. This kind of analysis is also called a top-of-mind report, which excellently reflects its specificity as it should be written from memory (or possibly study notes), and focuses on the most distinct results committed to memory by the moderator, constituting a summary of the most important cues in the ensuing discussion. Here too, just like in the case of debriefing, the outcomes are worked without a comprehensive and probing analysis of the materials collected in the study but are based more on the moderator's impressions. Because of this, it should be

predominantly descriptive, bereft of too far-reaching conclusions (since there simply is not enough time or groundwork – no transcriptions yet). The main top-line outcomes are succinct and cannot be too complex, covering around two–three pages, and be written in bullet point form. It's worth remembering that in view of the source of the main results compilation (the moderator's memory), the conclusions drawn can, of course, differ somewhat from those that appear in the final report. That is why I believe that the top-lines should be prepared (however, often they are not) in a text file (e.g., Word) in order to emphasise the document's working nature and to set it clearly apart from the final report. In marketing research, a written executive summary is usually deployed when the client is pressed for time to reach a decision. It then becomes a support in the decision process but a full and final report is, nevertheless, prepared later, forming the basis for the internal settlements between the agency and the client.

A common mistake is to agree to prepare top-lines for the client, which are drawn up 4–5 days after the study on the basis of transcripts, inclusive of graphics, and are presented on 30 slides in PowerPoint. This kind of product is, regrettably, definitely not a top-line but a hastily prepared, "half-baked" final report. The researcher's biggest problem after producing such an extensive top-line is actually writing up the final report because they will, undoubtedly, run out of content that can be included in the proper final report. Sometimes the only difference between such poorly executed top-lines and the final report is the presence of additional verbatims in the latter.

In the majority of cases, however, the end result of qualitative research is a detailed and extensive final report that – due to the sheer amount of time required to create it (or that should be required to create it) – should contain a much higher and more advanced level of analysis. Sometimes, alongside a written report (seldom instead of it), the client expects an oral presentation of the research outcomes. The preparation of a good presentation of qualitative research results certainly requires a lot of effort, as one usually only has 1–1.5 hours to succinctly convey an enormous amount of information. A good presentation requires approaching the results and integration of information from a global perspective and moving forward from the description level to the level of interpretation of the research findings. The quality of the presentation is raised through the introduction of diagrams that illustrate the outcomes obtained.

During an oral presentation of qualitative research results, one should be prepared for questions not only concerning the outcomes themselves but also the methods used, especially if the presentation is being given to a wider client audience also comprised of executives with little to no prior qualitative research experience or knowledge of relevant methodologies. Here, some very surprising things from the view of qualitative research experts may crop up all of a sudden, like questions about the reliability of the qualitative research or its representativeness (considering such a small sample size).

The presentation of findings should not merely be a reduced report made up of selected pages of the report in an almost entirely unchanged layout, despite this often being the case due to time constraints. A good presentation should zero in on the marketing questions and not try to resolve them. This oftentimes requires a completely different structure of results than that in the final report or a different graphical composition altogether. The presentation of results should be selective and concise, contrary to a report, which should entail complete documentation of the threads appearing across the interviews and be descriptive in nature so that anyone reading it can, without prior knowledge or participation in the study, easily understand the results obtained on its basis. From my own experience, I can see that the

best presentations are often created independently of the report and are the product of research discussions on the answers to the client's pivotal questions.

Principles of qualitative data analysis

Starting qualitative analysis during the interview

In quantitative analysis, the data collection and analysis processes are clearly separate; the data is collected by one set of people, others analyse them, and the analysis itself begins only once all the data has been collected and the whole data set has been utilised. Conversely, in qualitative research, the actual analysis begins right from carefully listening to the respondents while facilitating an interview, which is constantly subjected to verification in light the research goals and questions to which the researcher has to find the answers upon study completion, steering the course of the conversations along their lines (Belk *et al*., 2013; Gilgun, 2005; Sandelowski & Leeman, 2012; Walsh, 2015). At this stage of the research process, it's important for the moderator to have an open mind to the different ways of seeing and experiencing the world, and for him/her to be able to separate their own, personal point of view, beliefs, and convictions from what the respondents are sharing.

The freedom and flexibility of conducting qualitative research is something for which this methodology is often criticised. But this is also a tremendous potential of this approach (Wisdom, Cavaleri, Onwuegbuzie, & Green, 2012). The fact that the person conducting the interview can, at their discretion, modify the script and adjust the questions in response to the answers being given by the respondents provides enormous opportunities to obtain the information sought. Should the moderator – while analysing the collected information during the interview course – be asking him/herself if they have obtained enough information to gain a good and penetrating grasp of the studied problem, they can then appropriately modify the ensuing interview to maximise the utility of the gathered information. If, however, the moderator begins her/his analysis once the data has been collected, they no longer have any means of making modifications or adjustments. It may well turn out in such a case that the projective technique which was used in the interview failed to provide sufficient knowledge on the topic and that the questions being put to the respondents came to naught. Carrying out the analysis as early as in the interview facilitation phase helps avoid such problems.

The ability to analyse data while conducting the interview is invaluable, particularly when a debriefing is required immediately after the end of the interviews. If the moderator just passively sits and listens to the respondents, they will often not be capable of contributing anything to the debrief other than what the observers saw for themselves. A good moderator who analyses interviews as they go along, on the other hand, can have much greater input into the summary of the research, by far exceeding anything that the observers could pick up on from behind the one-way mirror.

Another argument in favour of the qualitative data analysis process beginning right from interview facilitation is the fact that a researcher who is only passively involved in the interview, oblivious of the later analysis process, may leave a lot of the information unprobed (which is yet another argument for moderators to also be adept researchers). Let's imagine that we're running a study on banking services and we want to find out why our respondents – users of competitive banks – have chosen this

bank over others, which will allow us to modify our offer. The respondent justifies his/her consumer decision with the following assertion: "I chose this bank because I value the quality of the services offered to me". This kind of statement, completely valid in an ordinary conversation, is entirely unacceptable in marketing research. Without probing "What kind of services do you mean?", "What do you understand by high quality banking services?", the earlier response is worthless for the client because of its overgeneralised form, thus, rendering it impossible to construe into recommendations for specific actions. Such unprobed responses are completely unproductive and lead to nothing in terms of the real motives behind choosing a given brand, leaving us on the level of clichés of no marketing value.

Understanding the significance of statements

The analysis carried out during the interviews is important but the fundamental and most time-consuming analysis takes place later, of course, based on the interview material prepared. The problem that most qualitative researchers face is differentiating between what is meaningful in the statements of the respondents and less so for the study, identifying responses revealing the true image of the respondent against false portrayals which should be omitted (e.g., the rationalisation of own choices described earlier – see Chapter 2). Unfortunately, there are no clear rules concerning separating the meaningful from the meaningless information, which should be left out. These skills are acquired by the researcher through research experience and gaining a wide range of expertise and knowledge on consumer behaviour, marketing mechanisms, principles for how advertising works, and psychological processes.

The basic rules for ascertaining the validity of information obtained in qualitative research are the repeatability of outcomes (Braun & Clarke, 2006; Dey, 1993; Miles & Huberman, 1994). If an observation or association emerges once throughout the study, we can never be sure whether this was only due to chance. Should an association crop up several or more times in subsequent interviews, we can assume with higher probability that the given observation is no coincidence. That's why it's so important to conduct at least two group interviews in the study and with the same type of respondents, making it possible for repeatability of results to be observed. This is precisely why one should avoid conducting one interview in a segment of interest to oneself, and it is why it's better to run four individual interviews or two–three dyads instead of one focus group (see Chapter 4). Thus, a qualitative researcher in the analysis stage should glean repeating outcomes and trends and, on their basis, draw conclusions about the significance of the given finding. When looking for the repeating outcomes, it's also important to remember that people can express completely different things using the very same words and, conversely, the same feelings, emotions, and impressions can be described using different words.

In order for qualitative research outcomes to be reliable, there has to be sufficient data (as is the case in quantitative studies) to justify reaching conclusions. Although a much smaller volume of data (observations) is acceptable in the case of qualitative research as compared to quantitative studies, here too certain minimum standards must be met. The problem with drawing conclusions from a single observation (regardless of whether it concerns an individual or group interview) is that the result cannot be compared with any other observation, thus, rendering it impossible to find a pattern or model for the observation (Krueger, 1998).

Searching for a broader context

The opinions of respondents collected in qualitative research in marketing are always confronted with the broader context of psychological and sociological knowledge, consumer mechanisms, and the principles for how advertising and marketing works (Attride-Stirling, 2001). As has been highlighted many times before, it is the subjective perspective, not the objective knowledge of the world which is revealed in a conversation with a respondent (see Chapter 4). Thus, if for instance a respondent shares that "This is a bad commercial", it does not mean (or at least does not have to mean) that the tested advertisement is truly bad (objective knowledge of the world), but that this is how the respondent sees things (respondent's subjective perspective). Bearing this difference in mind is the key to qualitative marketing research success, in particular the sine qua non of an accurate and relevant analysis and drawing conclusions about the research.

Searching for the broader context also includes going beyond what is rational: the stated opinions and controlled statements of the participants. Good qualitative analysis should also be based on non-verbal cues that create a highly useful backdrop for separating meaningful content, which should be taken up in the research (i.e., reflecting the actual opinions or feelings of the respondents), from the less meaningful that should be ignored (e.g., resounding the various prevailing "wisdoms" or stereotypes). Examples of such statements, which almost always surface in the context of advertising research, include: "Advertising doesn't work on me", "I never buy under the influence of advertising", "As for me, I think that all advertisements are stupid".

Box 8.13

The analysis of qualitative research should lead to an insight that will allow the researcher to perceive new meanings surpassing those directly resulting from what the respondent said.

A big problem in analysing contextual information in qualitative research is that it often is a very lengthy, drawn-out process (usually lasting one or two weeks). Unfortunately, as time goes on, many subtle details which cannot be incorporated into the transcripts or go uncaptured using recording devices observed during the study run, go amiss. Note-taking directly after each interview or voice recording the debrief discussion can help minimise this problem.

Box 8.14

Qualitative analysis is a complex intellectual process involving the categorisation of data, the search for dependencies and relationships, the making of comparisons, and the summing up of observations in order to answer to the research questions facilitating finding the right solution to solving the marketing problems underpinning the research.

Quantitative thinking trap: frequency vs. significance

Despite having previously pointed out on numerous occasions that the repeatability of observations is a very important basis for drawing conclusions on the significance of the qualitative research data, the frequency of occurrence of certain statements cannot be confused with their significance. It would certainly be wrong if a researcher attempted to count the frequency of occurrence of certain opinions and make inferences on their meaningfulness solely on this basis. Some information may surface a number of times just because it was provoked by the situation, is based on stereotypes or misconceptions, or is a dominant cognitive schema influencing ways of thinking. Recurrent statements – especially in focus group interviews where the participants influence each other – can also stem from the dominance of one person with a fixed set of views over the entire discussion group.

In contrast to the tendency to analyse data quantitatively is attempting to treat every statement appearing in the interview as meaningful. This does not mean that individual statements should be omitted from the analysis but that the analysis should, in principle, be centred on getting a concise, global picture of the content. With individual statements, in particular those that are inconsistent with the general overview of the results, one should first consider the reasons for such an opinion arising before taking it into account in the report. The person might belong to a different segment and is the only one to seldom use the studied product compared to the rest of the respondents (e.g., heavy-users), or maybe the person is a much lower- or higher-income earner than the rest. Practice shows that such analysis should be undertaken when conducting the interviews because, once working on focus group interview transcripts (contrary to individual in-depth interviews), the researcher often forgets who the author of a given response was and cannot make any corrections as to the value of the information, thus, the chances of making an error in interpretation is higher.

The final report

General guidelines on writing qualitative research reports

In most cases, the end result of a qualitative marketing study is a final report. The report, on the one hand, is a written account of the research outcomes; on the other, serves as the basis for settlements between the client and the research agency. That's why, when writing up a report (especially a commercial research report), one should not forget about both these functions (Krueger, 1998; Mariampolski, 2001; Sandelowski & Leeman, 2012). Considering the first function of the report, the most important aspect is that the content, namely, the data, should be analysed in line with the requirements for qualitative research methodology and serve the objective of furnishing as much and the most reliable information as possible. As for the other function, every effort should be made to ensure that the report is done in a visually attractive form and be coherent. A badly formatted report (e.g., too much and unwarranted bold type, underlining, italics, etc.) makes the text unintelligible and cumbersome to read. In the case of marketing research negative impressions produced by a poorly prepared report in terms of its form can actually thwart all the researcher's efforts and dominate the substantive content and the value of the report.

The final report is of paramount importance yet its role is often underestimated (Neale & West, 2015). A clumsy and shoddy report presenting the wrong conclusions or opposite, the right conclusions but in an unclear way, may result in important and valid research conclusions being overlooked and, consequently, the wrong decisions being made by the client. Because of this, not only moderation but also report writing skills are critical in qualitative marketing research (Rennie, 2012; Wertz, 1983). In most research firms, the facilitator of the interview is the same person as the one drawing up the final report. However, this is neither always the case nor always necessary because the skill set required to be a good moderator is not the same as that necessitated by a good final report writer. A top-notch, experienced moderator who builds excellent rapport with the respondents and is accomplished in facilitating discussions on any given topic is not always a first-rate report writer who can produce clear and precise reports that are a pleasure to read. On the other hand, it's worth bearing in mind that if the author of the report is not the moderator, they should have sat in on some of the interviews or at least watched the recorded interviews. If this is neglected and the report is based on the transcription alone, a lot of valuable information connected with non-verbal communication, the atmosphere in the group, and its dynamics will inevitably be lost. Additionally, if the report is not going to be written by the moderator, it's important for him/her to take part in the process of analysis of the results or at least to read the final report.

Box 8.15

A qualitative researcher is a broader concept than a moderator. The moderator handles the conduct of qualitative interviews whereas the qualitative researcher deals with all stages of the research: the planning of the research and, most of all, the analysis and interpretation of results and creation of reports.

When getting down to writing up the report, it's important to think about the reader – the things that are obvious to the researcher are not always so to the future reader. Depending on their level of competence and preparedness (familiarity with the study and research experience) the level of detail of the report should be adjusted accordingly. Clients with less research experience or no experience at all require more explanations and less research jargon. If, however, we are dealing with an experienced client, especially one that has been in longstanding cooperation with the researcher, the report can be more condensed with more room given for interpretations and conclusions than the description of results (what the respondents said).

Just like the interview itself, the report should be centred around the research goals (O'Brien *et al*., 2014). The report should not be a narrative of everything just because it appeared during the course of the interview. Thus, before sitting down to write up the report, it would be worthwhile preparing a plan first, to select and categorise the material. Such a plan is similar to a table of contents which is usually at the beginning of the report. A table of contents is also important because it tells the reader how the report is organised, where particular issues have been discussed, and how much room and attention has been paid to particular issues.

Basic parts of a report

The first element of the final report is the title page. It is important because it creates the first impression, hence, it should have aesthetic appeal. It should also contain the most important information enabling the client and research agency fast and easy identification of the report in their archives, even after a considerable amount of time has passed since its creation. This information first and foremost comprises the title. The title should always tell the reader about the research problem, not just about the method. Thus, a title along the lines of "Qualitative Research Report" will always be a bad title. A title only giving away the topic without any mention of the method will also be stinted and inadequate. The date of the research should also be found on the title page along with a mention of the author of the report which, depending on the company, will either be the name of the research agency or the specific researcher responsible for the project.

The table of contents immediately follows the title page, making it possible to swiftly navigate to a specific part or page of the report. A methodology chapter outlining the goals and methods used in the study directly precedes the presentation of results (Rabiee, 2004). In scholarly research, this part must be more ample and detailed than in marketing research. Nevertheless, details about the method employed must also appear in commercial research and should contain all the information required to give an indication of what the research was about and what it consisted of. In the case of qualitative research, the method should also include information as to when and where the research was conducted, how many interviews were run, and what selection criteria were used: key criteria specific to the research topic and additional demographic criteria (e.g., gender, age, and education) (see Chapter 5). This part may (but does not have to) contain information on the research flow (e.g., the sequence of the topics discussed) and the tools used (projective techniques, enabling techniques, etc.) (Tong, Flemming, McInnes, Oliver, & Craig, 2012).

The part that – contrary to its name – usually appears before the presentation of research results is the executive summary. The executive summary is not the same as the earlier mentioned top-lines, written up straight after the study, although they are often confused. The executive summary included in the final report, despite its small volume (two–three slides in PowerPoint), contains a much more advanced level of analysis than the top-lines drawn up following the study and also includes conclusions and recommendations. This summary constitutes a separate part of the report and should be clearly and coherently written, regardless of the remaining content of the report. The summary is placed either directly after the table of contents, before the methodology, or immediately after it. I personally advocate the latter solution, allowing the reader to become familiar with the research goals and methods before moving on to the executive summary.

Box 8.16

The executive summary is a separate part of the report and should be clearly and coherently written so that it can be fully understood even when taken out of the report. This part of the report is of paramount importance because it is the showpiece of the client and of the researcher.

The executive summary and conclusions should be an inherent part of every report, while the recommendations remain optional. Formulation of good marketing recommendations – as already mentioned earlier – requires extensive experience and, importantly, being equipped with information extending far beyond the facts gleaned in the research itself (e.g., product marketing strategy or planned advertising strategy know-how).

Box 8.17

Recommended elements of the report and proposed sequence

- Title Page (title, author, audience, date)
- Table of Contents
- Methodology
  - Research goals
  - Research method
  - Selection criteria of respondents
- Executive Summary of Findings – main results, conclusions, and possible recommendations
- Results and their Interpretation (divided into sub-chapters corresponding to specific issues)
- Annexes

The presentation of the findings occupies the most space in the report. This part should be divided into sub-chapters discussing relevant problems (Tong, Sainsbury, & Craig, 2007). Depending on the researcher's level of experience and the client's expectations, the presentation of the research findings should take on a more descriptive or interpretive form. I personally value reports that go beyond the level of a description, include an interpretation of the findings and the researcher's conclusions. However, since interpretive skills are extremely difficult, if the person preparing the report has no experience in such analysis it is better for them to remain on the descriptive level than draw unauthorised conclusions (and especially wrong recommendations). The descriptive style is easier for the person writing up the research (requires less effort) but more challenging for the reader because it leaves the conclusions to them.

Short films featuring respondent statements that illustrate key research results are an interesting supplement to qualitative research reports. These films can be included with the report and constitute an interesting enrichment of the presentation. In qualitative marketing research, films are mainly used in ethnographic interviews as they not only portray what the respondent is saying but are also a window into their world and their living environment, allowing us to see exactly how they go about their various activities related to the study topic (e.g., cleaning when looking into the use of household cleaning agents or cooking when researching specific foodstuffs). Another application for films, making the presentation of results more interesting and enhancing the delivery of the message, is quantitative and qualitative segmentation research.

If large segmentation research is supplemented by a qualitative deepening of the results obtained in the identified segments (often including ethnographic interviews), a brief 3–4 minute film for each segment with the most pertinent statements of the participants illustrating key research findings greatly helps to gain a more insightful understanding and a real feel of the specificity of each segment.

Other final qualitative research report writing tips

In the context of analyses of research comprising several interviews (groups, dyads, and individual interviews), the sort of questions I have come across are if the results should be presented and discussed in terms of the research problems (discussing issues independently of the interview as they appeared) or in terms of interviews (discussing everything that cropped up during each subsequent interview in turn). The final report should definitely be construed in terms of the research problems/issues (and not by interviews) as this gives a more comprehensive picture of the results and allows going beyond the level of description of the findings (Walsh, 2015). Such a report is also much easier to read because it contains fewer repetitions and more synthesis. This is particularly true of reports when the script is the same throughout, the groups have a similar composition, and the research goal does not entail a between-group comparison. It is very important that final reports in such scenarios are structured around the research problems. If the groups are clearly different and the research goal is to gain an in-depth understanding of specific groups and the differences between them, the analysis can be structured around groups (e.g., teachers, pupils, and parents in a study on educational issues, women and men in research concerning the use of contraceptives, or subsequent segments in segmentation research). Separate reports from each interview should not be written up in this situation either. Such reports must also not be deprived of a commentary discussing the differences and similarities between the studied groups of respondents.

There are concerns when preparing qualitative research results concerning what percentage of the final report should respondent verbatims occupy, and how much of it should be devoted to the description of the findings. I personally think that verbatims are interesting and should be incorporated into the qualitative report, bearing in mind, however, that they serve merely as an illustration, adding appeal to the text, and not as its core element. Sometimes one can come across reports where verbatims make up a major part of the presentation of the findings and are left almost without any comment on the part of the researcher. This is definitely a badly composed report and gives the impression of the analysis being left to the reader. The client usually expects downsized and condensed data and any verbatims should only be for enrichment, to portray the group atmosphere, the language of the participants, and specific phrases used. That is why I believe that verbatims should take up no more than 5–10% of the presentation of the findings. Since the role of quotations in the report is similar to the role of illustrations in a book, verbatims should not appear in the main body of the text but be clearly set apart from it. The report should be fully comprehensible without having to read any verbatims, just like every narrative should be coherent without its illustrations. When introducing verbatims, it is also worth mentioning who the author of the quote is using characteristics relating to the study design groups and the key recruitment variables (e.g., “new-car user, female, 25–45 years old” or “old-car user, 25–45 years old, male”).

Box 8.18

Verbatims are interesting and should be incorporated into the report, bearing in mind, however, that they serve merely as an illustration, adding appeal to the text, and not as its core element. The report should be sufficiently clear and coherent without having to read the quotations. Hence, verbatims should only be for enrichment, to portray the atmosphere of the interview, the language of the participants, and the specific phrases used, but not to provide content that is crucial to the report.

Another issue altogether is which verbatims should be selected for the report. Quotes must, above all, be in sync with the content of the report. For instance, one cannot write in the report that the advertisement was positively received and then present two quotes, one of which expresses a positive opinion of the advertisement and the other criticising the studied advertisement. The selected quotes should also be checked for linguistic correctness. Quotes should be presented in the most literal form possible (to get a sense of the "living person") on the one hand, and be fully comprehensible for the reader, on the other. Colloquial language often has parts of the sentence missing (e.g., either the subject, or the predicate, or both the subject and predicate) or has grammatically incorrect syntax. Such statements taken out of context and presented in their literal form could be incomprehensible as far as the reader is concerned.

Box 8.19

Qualities of a good report

- short, concise, but not cursory (cannot omit important threads)
- communicative, adapted to the reader
- research goal-centred
- contains appropriately selected verbatims – both in terms of their content and volume
  - verbatims vivify the work (when they're interesting)
  - verbatims illustrate the text (when they're consistent with the content relayed in the report)
- contains an interpretation and not just a description of the findings
- clean and neat layout and coherent graphics

Moreover, a good final marketing research report should not be longwinded. Some researchers erroneously believe that a long report is tantamount to a high quality report and that the number of pages handed over to the client should be directly proportional to the funds spent on the research (Wisdom *et al.*, 2012). The corollary of this is vast and voluminous reports (e.g., 50–60 pages in small font), which are

impossible for the reader to take in and digest. Oftentimes, half or even a greater portion of such a report is made up of verbatims or descriptions of respondent responses, completely lacking an interpretation of the findings or conclusions. Such reports are obscure and verbose with many reiterations. A good marketing research report is concise and specific and portrays the global picture of the findings, bringing the most important ones to the fore without undue focus on the details. Unfortunately, contrary to what one might expect, writing a short but succinct report is often more challenging and time-consuming than writing 50-odd pages of useless text (Wu *et al.*, 2016).

Box 8.20

Writing up a qualitative research report is the art of making right choices and good selections. Not everything that appears in the interview should be included in the report – a good researcher can pick out what is truly important from the insignificant that could overshadow the most significant research findings.

In present-day marketing research, where the tendency has clearly been to drift away from writing qualitative research reports in the form of a single block of text created in Word (narrative report) and move towards creating them as extended PowerPoint presentations, graphical ways of reporting results in such reports are becoming increasingly more common (Appendix 2). These illustrations should be a means to an end, not an end in themselves, and should add another dimension to the report. Well-thought-out illustrations can help the readers gain a more thorough understanding of the relationships between different study subjects (e.g., brands, product categories), perceptual maps, typologies (e.g., of the respondents), causal relationships, and the like. The illustration alone hardly ever suffices for a full understanding of the illustrated phenomenon and should be complemented by a write-up.

The last element of a report (although not always present) are annexes. Annexes should contain everything that is not essential to understanding the report from the research, but comprise documentation that allows getting a better picture of the flow and course of the research. This is also where the research materials used in the research can be included: the guide, projective techniques, and sometimes even the raw data collected from any projective techniques used.

Exercise 8.1

Split into pairs where one person will play the role of the respondent and the other will carry out the interview (taking turns). Conduct a 10-minute interview about "The most important things in life for me".

Next, discuss the interview that was conducted according to the following criteria:

- The interviewer – sum up in 3–4 sentences what you have heard during the 10-minute interview, what is most important in the respondent's life.
- The respondent – give feedback on whether the interviewer gave a good summary of what you said, comment on whether the facilitator gave across what you wanted to say/express.

Exercise 8.2

Select two volunteers from the participants for the exercise, one of which will be the respondent and the other will conduct a 10-minute interview, the aim of which will be to diagnose the respondent's eating habits. The remaining participants are observing the interview, after which they will split up into groups three–four persons and write up a summary of the interview (a diagnosis of the respondent's eating habits). Then, each group analysing the interview presents their diagnosis.

Pay attention to the following aspects during the exercise:

- How similar were the respondent's eating habit diagnoses across the groups involved in the analysis?
- If the diagnoses (summary, conclusions) prepared by different groups were divergent, what was the root cause of the discrepancies? Were there any overinterpretations, unfounded conclusions, or conclusions not backed by data?
- What was missing from the interview (what information) in order to make an accurate diagnosis?
- What was the respondent's response to the formulated conclusions? Which conclusions does the respondent agree with and which do they think are flawed?

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9 Concluding chapter

Future developments in qualitative marketing research

Why will qualitative research in marketing not disappear?

Qualitative research, as shown in the book, is subject to various changes, modifications, and evolutions. Modern focus group interviews are no longer what Merton and Lazarsfeld referred to as focus group interviews and they are also different to what they were 30 years ago (e.g., in terms of the preferred number of respondents). In the context of ongoing transformations in the approach to qualitative methods, the introduction of continually new (or modification of old) methods, and the occasional rise of ominous prophecies that the end of qualitative marketing research is nigh, it would be good to consider the future of this method of acquiring consumer knowledge.

Throughout my over twenty years of experience with marketing research, I have survived several grim prophecies that qualitative research (group and individual) is coming to an end as it will be replaced by some kind of new methods (like semiotics, neuromarketing, or online qualitative research). However, after some time, it always turned out that the new methods are not so much driving classic methods out but usually existing alongside them, thereby excellently complementing to the tools harnessed by marketing researchers. Looking at it globally from the perspective of several decades, it is the internet which has had the biggest impact on how qualitative research is conducted. According to ESOMAR data on the world marketing research market, in 2015, quantitative research constituted 70% of the $68 billion research market, qualitative research made up 16%, and other methods including desk research and Big Data a mere 14% (ESOMAR, 2016). Compared to figures from previous years, an increase in the "other" category can be observed but not at the expense of qualitative but quantitative methods – the share of qualitative methods across the entire research market has remained almost unchanged for several years. Stronger changes can be observed within the qualitative research category where online research is playing an increasingly bigger part.

Marketing research is also subject to various trends. New methods appear (or old ones are rediscovered) from time to time, gaining in popularity so much so that almost every corporate marketing department commissions them, tries them out, but also usually goes back to the qualitative research conducted earlier (although not always rightly so). A trend for ethnographic research emerged towards the end of the 20th century (Mariampolski, 2006; Pink, 2005). The growing interest in these methods raised concerns that they would dominate classic research. However, this was not the case. Ethnography still has its place among qualitative research but (unfortunately from my perspective) it is still a niche type of qualitative research with a relatively

low research market share (see Figure 9.1). I believe this to be a huge loss because certain important marketing questions (e.g., concerning consumption habits, consumer behaviour motivation, and values) are best answered by using this very method. On the other hand, the niche position of ethnographic research is quite understandable because, from the economic perspective, such research is not very cost effective, with long lead time and high costs, especially in relation to the number of respondents studied. However, it is – as I mentioned earlier – irreplaceable from the point of view of deepening the knowledge and quality of insights.

Semiotic analysis grew in popularity at the same time as ethnography, and even new research firms specialising in this very method emerged. Perhaps the best known company of them all is Semiotic Solutions established by Virginia Valentine, who pioneered the use of semiotics in market research. Semiotics is a branch of logic studying the life of signs. In the marketing context, semiotics deals with the analysis of marketing communication from the cultural code perspective (e.g., what knowledge about the role of money in society and people's relation to money can be gleaned from bank advertising). In such studies it is not the respondents that are the subject of research but the brands, product categories, and phenomena, where the codes, symbols, and narrations accompanying the researched object are decoded through an analysis of the available communication (Gordon, 2004). This material is used to make inferences about which emotions and beliefs can be created in the recipients of such communication. This kind of research, after its prime time as an independent research method, has now become more of a tool in the hands of a qualitative researcher complementing other methods (e.g., more classic qualitative research).

The beginning of the 21st century brought another breakthrough, when neuromarketing using physiological indicators of arousal (EEG, heart rate, facereader, and eyetracking) appeared, although the first attempts to use physiological measures were made in the 1980s. That was when it turned out that the studies are too time-consuming, expensive, and often too cumbersome for the respondents. However, the dynamic advancements in the field of technology and IT have led to the instruments measuring physiological indicators being more readily available and to a resurgence of interest in these methods in the context of the trendy term of "neuromarketing". These methods are mainly used to investigate marketing communication like commercials, packaging, and product placement on shelves. The communication on the supremacy of these methods was rooted in a similar reasoning to that underpinning this book, namely, that the consumer is often unconscious of the reasons for his/her behaviour (cf. Chapter 2), which is why asking them about this outright is pointless. Hence the postulate for measuring the automatic physiological reactions instead (e.g., eye movements in the case of eyetracking or the microexpression of emotions in the case of the facereader), which give a better prediction of consumer choices than classic qualitative research. The greatest proponents of neuromarketing were even conjecturing the end of qualitative research (Lindstrom, 2008). Practice has shown, however, that after the neuromarketing trend period, it is now another niche area for marketing research, which undoubtedly complements qualitative methods but does not replace them (Maison & Stasiuk, 2014). Whereas neuromarketing methods are without a doubt a very useful source of knowledge about the consumer that is used rather in scientific consumer research, giving a better understanding of the mechanisms underpinning the formation of consumer attitudes and behaviour (Maison & Oleksy, 2017; Maison & Pawłowska, 2017).

The 1990s digital revolution led to the digital revolution in marketing research, in both the fields of quantitative and qualitative research. From the point of view of this book, the emergence of online qualitative research was the most important (cf. Chapter 3) as well as the predictions that it brought with it that this time these methods would oust classic qualitative research. As demonstrated in Chapter 3, this was not the case for online focus groups but the internet has, unquestionably, become a major tool and source of qualitative data acquisition. Online qualitative research (bulletin board, market research online communities (MROC)) is gaining popularity and its share in qualitative research will surely continue to grow since the internet for many people is becoming an ever more natural environment. However, some people argue that online qualitative research is not a specific method of research from a methodological point of view (still being qualitative research), but a new way of reaching the consumer, extracting information from them, and a means of communicating with them. From this point of view, these methods will probably evolve towards ever-new ways of using the internet. There is already talk of the classic bulletin board being soon replaced by online chats (Verhaeghe, Van Neck, Tomoiaga, & Plazo, 2017). This is explained by the fact that chat and messaging apps like WhatsApp, Facebook Messenger, and WeChat are becoming the dominant communication medium for increasing numbers of people, not just the young. What's more, there is also the view that such research could soon be conducted using chatbots, without even requiring a researcher. Research testing chats as a means of collecting data in marketing research provided interesting results (Verhaeghe, *et al*. 2017). The data was collected under two conditions: through a classic chat and comparative chatbots. To the researchers' surprise, the data obtained from chatbots did not differ in terms of quality from that collected in the second research condition (classic chat with a person/researcher on the other side), and the advantage was that the data was gathered much faster through chatbots. This example shows that the ways of reaching and collecting data from the consumer within online qualitative research can also change along with the technological developments in the field of communications. New methods and solutions will no doubt appear but what is most important is for them to be used appropriately, in a manner harnessing their full potential but without giving in to fashion-driven usage (McPhee, 2010). It's also worth noting that data obtained within online qualitative research can never surpass the quality of the data collected within classic qualitative research, where the relationship between the researchers and the respondent is direct. This allows for the respondent and his/her behaviour, facial expressions, and the whole array of non-verbal communication to be observed – which no emojis can replace (cf. Chapter 7). Hence, online qualitative research will never achieve the same level of deepening of the results obtained as face-to-face research, although, as mentioned earlier, online research already has its prominent place among qualitative research and there are issues where it is also irreplaceable.

Another type of research that is attracting a lot of interest right now is Big Data, that is, the analysis of existing data. There are two driving factors of interest in such sources of information about the consumer: the vast "overproduction" of data, which are used only to a small extent, and the development of IT and analytical solutions facilitating the collection of useful information to marketing. Behaviour is analysed based on passively collected large data sets (e.g., data on transactions from banks, Facebook activity data, online shopping transactional data) (Kosinski, Matz, Gosling, Popov, & Stillwell, 2015; Kosinski, Stillwell, & Graepel, 2013). Big Data has also

opened the door to new hopes for business executives to improve organisational performance by supplying many new insights that could not be obtained using traditional methods (Strong, 2013). After the strong interest in the Big Data method (as well as the concerns or hopes that it could relegate other research methods to which researchers have become accustomed), it turns out that also in this case, although information coming from Big Data gives an accurate picture of behaviours, it does not provide the knowledge about their driving motives and the person's whole inner world. Big Data and the predictive analytics tools accompanying this phenomenon have created unparalleled possibilities for tracking human behaviour based on the digital trail left behind by them, identifying the unapparent relationships between various behaviours and phenomena, as well as profiling, and the subsequent targeting of consumers (Kosinski, Bachrach, Kohli, Stillwell, & Graepel, 2014). Nevertheless, the very access to huge data sets cannot replace the deepened understanding of the human person that qualitative research methods provide. Thus, Big Data can – at least in the case of certain marketing problems (see Chapter 1) – be an interesting complement to knowledge about the consumer (particularly their actual behaviours), but it will never replace qualitative research. From this perspective, Big Data is more of a threat to survey quantitative research where knowledge concerning consumer behaviour is based on declarations.

Another trendy marketing research method over the last decade or so which appeared mainly in the context of innovation research is the so-called "co-creation". The usefulness of classic qualitative methods in the context of innovation has long been criticised while their relevance for managerial decisions has been questioned. In classical research in this field, respondents are asked about their opinions about a new solution that is not yet available on the market. It turns out that data collected in this way unfortunately do not lay strong groundwork for the success of a given solution (cf. Chapter 3). After years of criticism of innovation research, there were calls to change the role of the consumer from a passive (supplier of opinions) to an active one – being a co-creator of innovation right from the earliest stages of their development. Some companies (e.g., P&G) have even adopted a general rule that innovation must come from the company's external environment, including from consumers (Medeiros & Needham, 2008). This is how the co-creation concept came about as a method of obtaining qualitative (but not only) information from consumers, and its popularity has been increasing in recent years (Dierikx & Lynch, 2008; Needham & McNaughton, 2009). More and more companies like, for instance, P&G, Philips, BMW, and Unilever are creating innovation based on the co-creation method (Dodgson, Gann, & Salter, 2006; Jawecki, Bilgram, & Wiegandt, 2010; Medeiros & Needham, 2008). Studies comparing co-creation with traditional qualitative research have confirmed that they have a higher relevance when it comes to introducing innovations (Tseng & Chiang, 2016). But what is co-creation from a methodological point of view? It is very difficult to answer this question unequivocally because co-creation may be anchored in various well-established methods. One of them is a qualitative workshop in which both clients and consumers take part, the other is the creation of online communities based on the firm's own clients, not only becoming a source of information derived from the consumer (just like in classic online qualitative research) but also a tool for co-creating innovation and building relationships with consumers. Co-creation is undoubtedly a consumer-centric method where the consumer-respondent role significantly changes. The consumer becomes the co-creator and starts to have a

real impact on the development of new solutions (Prahalad & Ramaswamy, 2000). However, it's difficult to determine whether co-creation is a new research method (probably not), or only the application of already existing methods (online communities, qualitative workshops) in a new context (innovation), or even, as is sometimes said, a new company management technique that takes greater account of the consumer as the source of the implemented changes and not just their recipient. It definitely is a method that has recently received considerable attention in the qualitative research practice. It is worth noting, however, that putting the qualitative research consumer in a new role of a marketing action participant and co-creator of new solutions is indeed a very important consequence of the co-creation trend. This is a shift from a passive to an active, or even interactive role. It is "the idea of creating products and services *with* and not only *for* the users" (Jawecki *et al*., 2010).

In the context of the trends and new (old) research solutions emerging recently, it seems that the position of qualitative marketing research is still strong and stable (Cooper, 2007). There are still topics that cannot be investigated in any other way than by in-depth individual interviews or using ethnographic research (e.g., motivations, values, needs, especially the unconscious ones). There are signs, however, that there is change in the manner of obtaining qualitative data, which is being increasingly sourced from the internet (e.g., analyses of discussions on existing online forums) or over the internet (e.g., bulletin board). Nevertheless, as demonstrated by analyses comparing online and classic qualitative research, it is the latter that continues to supply information of a greater depth and it will still be more useful to research problems requiring such knowledge (Brüggen & Willems, 2009).

The word search frequency list covering a 14-year period (from 2014 to 2018) prepared by Sotrender (www.sotrender.com), a company specialising in the analysis of social media, shows the changing interest in various keywords connected with marketing research (Figure 9.1, analysis based on Google Trends). The outcomes of this analysis

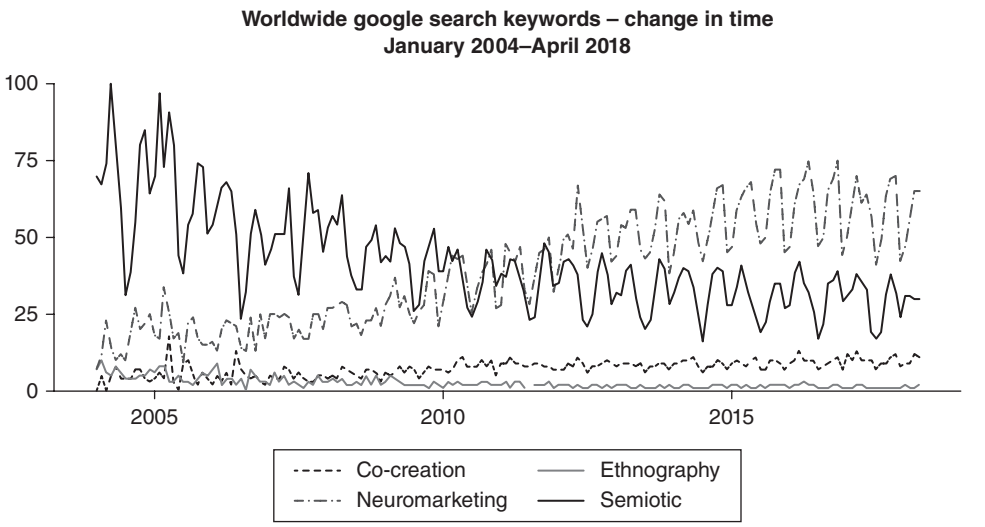

Figure 9.1 Comparing the frequency of internet searches for words relating to marketing research over 14 years (2004–2018). Source: Sotrender based on Google Trends.

confirm the research trends mentioned earlier, manifest in the changing interests in various methods of obtaining knowledge about consumers. In general, neuromarketing and semiotic are searched for much more frequently than the co-creation and ethnography keywords. Furthermore, interest in research topics on the internet is changing over the analysed years. A gradual decline can be seen in the case of the semiotic and ethnography keywords but this drop is more pronounced in the case of semiotic ones because of the much higher level of interest in this word compared to ethnographic. As for the keywords of neuromarketing and co-creation, a continuing increase can be seen in searching for these terms, although interest in using this method in the practice of marketing research is dwindling. The drop and increase is more clear-cut also in this case of a keyword of greater general interest (semiotic or neuromarketing).

Qualitative research of the future

From the perspective of my many years of experience in conducting marketing research, I am convinced that qualitative research will continue to have a secure position as a source of marketing knowledge, although, in the context of the growing volume of available information about the consumer (e.g., from Big Data) it is likely that its role will change somewhat as will the predominant tools for collecting data and reaching the consumer change (Nuttall, Shankar, Beverland, & Hooper, 2011). Let's consider then how qualitative research of the future will look like, in which direction will the changes go since the volume and availability of various consumer data is continuing to grow?

In my opinion, there will first be a greater integration of the various sources of knowledge about the consumer and the different methodologies. Quantitative and qualitative research will be much more integrated with each other. This tendency can be already seen in the changes in the organisation of large research firms. The breakdown into separate quantitative and qualitative departments that have no contact with each other and no knowledge of their research conducted for one and the same client has thankfully been consigned to history. At present, departments are increasingly qualitative and quantitative, where experts from different research methods closely work together. The ideal, from my point of view, are researchers that combine qualitative and quantitative competences, allowing them to think less in terms of "methods" and more of "problems to be solved" or "questions that have to be answered" (cf. Chapter 1). Apart from integrating quantitative and qualitative methods, there should also be a greater openness to various qualitative methods to combine them in one research project. This approach focused on combining different methods and methodologies, is referred to in science as the "mixed-method approach", also called the "hybrid approach" or "bricolage" by practitioners. In classic sociology, combining different methods of searching for information has been known for a long time and is referred to as "triangulation" (Koller, 2008), so it is not a new concept. Unfortunately, the combining of different methods is not used that often (or, in my opinion, as often as it should) in the practice of marketing research. And I am not talking about the automatic or schematic proposing of "surveys accompanied by several focus groups", but a wise linking of several methods, where each delivers different information and is selected precisely because of its specific manner of collecting information.

The integration of several methods should also be accompanied by a greater receptivity to the use of new and unconventional research solutions. Qualitative research

should not be limited to existing methods that have been named and described in this book. However, this does require the researcher to be more creative and for his/her vista to change course from thinking about which method to use, towards considering how a specific research problem can be solved and how to obtain the answers to the questions raised. Let us imagine, for instance, that we are conducting research for a large brewery and we want to gain insights into why consumers choose certain brands over others. We can, of course, use traditional focus group interviews but we also have the option of visiting several pubs and actually talking to consumers in a relaxed atmosphere, over a pint of beer. It is unlikely that this will replace traditional research but it may be an interesting enhancement. It is worth remembering that a qualitative researcher has unlimited possibilities for finding his/her own ways of seeking knowledge and gaining an understanding of the consumer and the world in which they live. Qualitative research is not merely a tool but above all a way of thinking. It is a search for information of a qualitative nature, which does not have to be limited to what is already known and familiar. However, this requires a great openness of mind from the researcher in the research-planning phase and the power of persuasion to bring the client round to a non-standard solution as well as courage on the part of the client to take a risk and do things differently.

Another trait of the qualitative research of the future is, in my view, its much greater contextuality than at present. First, this refers to the growing importance of psychological knowledge about the consumer as a person in explaining their consumer behaviours (cf. Chapter 2). Hence, conversations about the product, brand, or service will increasingly become just one of the elements of an interview, where more attention will be paid to understanding the values, needs, and experiences or emotions of the consumer (cf. Chapter 6). Second, the context also entails knowledge of the culture and the environment in which the consumer lives. Understanding the socio-cultural phenomena in the consumer's surroundings will also help the qualitative researcher gain more insights into their choices. The way I see it, qualitative research of the future will involve the "study" of the consumer in the context of everything that surrounds them and in light of everything that they have experienced to date. Only such a wise and broad way of looking at the consumer can ensure a good understanding of the consumption phenomena and, consequently, the provision of valuable information to the client, which translates into sound and well-reasoned business decisions.

The last attribute of qualitative research of the future is, in actual fact, an expertise of the qualitative researcher. They should be someone characterised by knowledge of the consumer obtained not only from the research conducted by them (and, worse still, from what the consumer says about themselves, for example "I never buy under the influence of advertising"), but also from other sources, also scientific ones and from different fields and areas. This knowledge will give an enhanced understanding of the phenomena observed within the conducted marketing research, a better explanation and prediction of consumer behaviours and, most of all, facilitate the formulation of more fitting recommendations for the client (see Chapter 1). It is also worth stressing that the scientific approach in this sense means science as a source of knowledge, which constitutes the background for the data derived from qualitative research, whereas science as a theoretical basis for conducting research (e.g., grounded theory, narrative analysis, or hermeneutics) is not applied in the practice of marketing research, unlike in qualitative scientific research (which also concern consumer behaviour).

Table 9.1 The characteristics of qualitative marketing research of the future

Mixed-method, hybrid method, bricolage, triangulation	• Integration of qualitative with quantitative methods – concerned with "finding the solution" and not "conducting the research" or "using particular method" • Integration of different qualitative methods • Integration of different sources of information about the consumer (e.g., Big Data, analysis of blogs)
Flexible	• Open to new, unconventional solutions • Experimenting with new methods, creating new methods
Contextual	• Consumption understood through broader knowledge about the consumer as a human being (in the context of his/her experiences, values, and lifestyle) • Consumption understood through broader knowledge about consumer background (family, community, and culture)
Grounded in scientific knowledge (as background)	• Consumer opinions and declarations of behaviour should be examined in the context of up-to-date scientific discoveries/ knowledge from the field of psychology, consumer behaviour, advertising, and behavioural economics, etc.

If one were to examine the traits of qualitative research of the future mentioned by me, they constitute wise, profoundly insightful studies of the consumer in different contexts supplemented by the latest scientific developments and knowledge. They are also studies requiring extensive experience and wisdom of the qualitative researcher. Why did I draw attention to precisely these traits of the qualitative research of the future? Because qualitative data as such is more easily available and may soon not even require a researcher (chatbots), in this situation, the raison d'être of classic qualitative research will lie solely in what will set it apart from easily available data.

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Appendix 1

Example of qualitative research guide prepared for research on seniors 60+

Research aim: to gain in-depth knowledge about segments of people 60+ (extracted based on a quantitative nationwide survey n = 1000) in order to understand their lifestyle, values, approach to life, media usage, and consumption. A communication campaign directed to promoting an active lifestyle and inclusion in different areas of life was planned based on the study.

Methodology: 36 in-home interviews of an ethnographic nature – 6 interviews per segment. Each interview lasted approximately 3–3.5 hours. Interviews were preceded with a pre-task (diary lasting five days), where respondents had to do different tasks each day.

Pre-tasks:

Day 1. Collage *"Me now"*

Day 2. Collage *"Me ten years ago"*

Day 3. Collage *"My free time, my places"*

Day 4. "Activities diary" – the list of all activities during the whole day (from waking up to going to bed)

Day 5. "Eating diary" – the list of all foods eaten during the day (including drinks and snacks)

Discussion guide: in-home individual in-depth interview

Full version of scenario. The purpose of the scenario is communication with clients and setting up interview standards between the four moderators involved in the research. Therefore the scenario is written in the form of questions; however, they are not questions to be asked, but they describe areas to be investigated.

1. Introduction (5 minutes)

- Self-presentation by the moderator and laying down the rules for conducting the interview: recording, ensuring anonymity.
- Presentation of the research goal: understanding the needs, habits, and opinions of people of different ages.

2. Self-presentation by the respondent (25 minutes)

Aim: *Psychographics; understanding how the respondent perceives themselves, their life, what's important to them, how important to their identity is their age, what builds their identity.*

- Please tell me a bit about yourself . . .
- I'd like us to start in a somewhat non-standard way. If you were to show me one room/place in your home that would best describe you as a person, which would give us the biggest insight into you as a person, what room/place would it be?

The moderator takes a photo of this room/place and asks about the reasons:

- Why exactly did you choose this room/place in your home?
- What can it tell me about you?
- What do you like in it and what do you dislike about it? What would you change in this place to fit you better? Why?

The moderator refers to the collage themed "Me now" from the diary (Pre-task 1):

- Now, let's take a look at the composition that you prepared about "Me now". Did you find this task difficult? Why?
- What have you included here? Why these pictures/drawings? What did you want to express through them? What do these pictures bring to your mind?
- What's important to you? Which areas of life do you put in first place and what is less important? Why?
- What gives you greatest joy? And what worries you, what are your cares?
- Do you have any hobbies, interests? What kind?
- What are your dreams? What kind? Are you working towards fulfilling your dreams in any way? In what way exactly?
- Taking into account the past year – what would you say were your successes and achievements, and what made you happy, proud? And were there any failures or setbacks? What kind?

The moderator refers back to the collage themed "Me, ten years ago" from the diary (Pre-task 2):

- And now let's look at another task – the "Me 10 years ago" collage. Did you find it difficult to complete this task? Why?
- What have you included here? Why these pictures/drawings? What did you want to express through them? What do these pictures bring to mind?
- Back then, how did you imagine that your future would look like? Did you expect yourself to be in the place that you are now?
- What would you say had an effect on the way your life looks like today?

The moderator is attempting to understand if the person is directing their life, if they feel that they have a sense of agency, that they are in control of the way their life looks like, or if they feel that not many things are independent of their actions and not a lot depends on them (internal vs. external locus of control diagnosis).

3. Between youth, middle age, older people, and old age: attempts at defining them and their transition points (15 minutes)

Aim: *Understanding how these concepts are understood by the respondent, what is the starting point of old age for the respondent, what is it determined by, and understanding the differences in, the perception of these matters depending on the segment.*

Before we move on to various areas of life that are important to you, I'd like to talk a little about age, about what it's like in different stages of life, what it means to be young, old, etc . . .

- How would you divide the human life stages? Where does youth begin, where does it end, and what's next?

If the respondent fails to specify, go on to ask them about the particular life stages: youth, middle age, older people, and old age.

- What demarks these stages in a person's life?

If the respondent fails to specify, ask them about such aspects as: age, children, work vs. retirement, psychological vs. physical condition/wellbeing, or the role of external events and inner predispositions.

- How would you describe, in a few words, a typical representative of these groups (young, middle age, elderly, and old-age person)?
- Which group would you consider yourself to be in? What makes you say that you are in this group?
- Let's now take a closer look at your generation? How would you describe it? What words would you use to define it? Do you consider yourself a "typical" representative of your generation/the older generation? Why is that?
- Can the representatives of your generation be grouped somehow? If so, how? On what grounds/dimensions?

4. Approach to work and approach to retirement (20 minutes)

Aim: *Understand how respondents view work and retirement, how they approach them, and/or are they important areas of their life.*

Work

- Are you working currently?

If they are still working:

- What do you do for a living?
- What role does work have in your life? What do you get out of it?
- What are its biggest advantages? And what are its greatest disadvantages?

If they are retired and no longer working:

- What did you used to for a living do before you retired?
- What role did work have in your life? What did you get out of it?
- What were its biggest advantages? And what were its greatest disadvantages?
- Do you miss working? Why?

If yes:

- How is this manifested?

Retirement

- What is retirement to you? What does it mean, how do you understand it?
- How would you describe the life of an average pensioner? What could you say about them, how would you characterise them?
- Is it somebody like you? What common traits do you have? And what don't you have in common?

The moderator follows up with those still working:

- What's your take on the prospect of you retiring? What feelings accompany this? Why?
- What's positive about retiring? And what are its negative aspects?
- How do you think your life will change once you retire? Do you think it will be a good or bad change? Why?
- Are you preparing yourself in any way to retire? If so, how? Why?

The moderator follows up with those who are retired:

- Could you, for a moment, think about the year before you went on retirement? What was your take on the prospect of you retiring? What feelings accompanied this? Why?
- What was positive in retiring? And what was negative about it?
- After you retired, did your life change in line with your expectations? Why was this?
- Has your life changed in any way? What changed and why?

5. Fostering health (10 minutes)

Aim: *Understanding how the respondent approaches the matter of health; is health important only on a declarative level; and what are the actual actions being taken towards this, what lifestyle.*

Now let us talk a bit about health?

- How would you define your lifestyle, would you say that you lead a healthy life, or not really?
- What does healthy living mean to you? Where do you get healthy lifestyle information from? Who or what would you say is a reliable source of information about healthy living? Why these persons/sources?
- What do you do to foster healthy living? (if the respondent declares healthy living-oriented actions, probe to gives examples)
- Is there anything that you'd like to do but aren't doing or you're not doing enough of to foster healthy living? What kind of things? What's keeping you from not doing them in the end?

If the respondent fails to specify, probe about the preventive actions, healthy eating, sports, vitamins, dietary supplements taken.

6. A typical day in the life of . . . (25 minutes)

Aim: *To understand what the respondent's average day looks like, what do they spend most of their time doing, if this activity is important to them, does it give them satisfaction, or is it a burden for them, etc. Understanding social functioning (family and friends).*

- I'd like you to think about a typical day in your life. How would you describe it?
- What time does it start? What's the first thing that happens?
- And what comes after that? And what else?
- What kind of activities does your day revolve around? Why?
- Would you say that these activities are more chores or pleasant? Why?
- What dominates your day – chores or pleasant activities? Why do you think this is the case?
- Does it vary depending on what day of the week it is ("ordinary days" vs. the weekend)? If so, how?
- Why do you spend your time like this? Does this (state of things) suit you? If you had the chance, what would you change in your daily routine? What would there be more of? And what would there be less of?
- Is there anything that you'd like to do but for some reason are not doing? What kind of things? Why aren't you doing them? What would have to change for you to do them in the end?

Other people

- What kind of people do you meet up with during the day/week? Let's list them now . . . With whom did you meet last week?
- Who are these people? When do you see them/meet up with them? In what situations? Why is that?
- And how do you feel when you see/meet up with them? Would you say that it's a rather pleasant or unpleasant situation for you? How does this affect you? Why?
- How would you feel if you no longer had any contact with this person? What would this change? And what about if you had more contact with this person?

The moderator probes about specific people, like children, grandchildren, carers, friends, and neighbours, etc. (if those people were not yet mentioned by the respondent).

- Are these meetings different in any way depending on whether they take place during the week or at the weekend? How do they differ?
- Are you happy with the meetings with these people and their frequency? If you had the chance, what would you change with them? Who would you like to spend more time with? And who would you like to spend less time with? Why?
- Are there any people with whom you'd like to have contact but don't for some reason? Who are these people? Why would you like to have more contact with this particular person?

Family (probe if no chance to diagnose this earlier)

- What is family to you? How significant is it to you?
- What is your contact with your family like? What is its frequency? With whom exactly? How is this time spent?
- How would you describe an ideal family relationship? Who and how much should people give of themselves? And what's your situation?

7. Shopping, consumption: locations, products (25 minutes)

Aim: *Understanding how, how often, and where respondents do their shopping, what are their shopping habits like, what plays a role in their brand and product choices.*

- I'd also like to discuss the topic of shopping with you in somewhat greater detail.

Everyday shopping (foodstuffs, cosmetics, sanitary articles)

- What kind of everyday shopping do you do? How did your shopping look yesterday, or the day before yesterday?
    - Is it more small bits of shopping or big shopping once in a while?
    - Different products in different places or everything in one place?
- In what stores? Are they more small stores, markets, or large supermarkets? What makes you choose these places to do your shopping?
- Are you taking part in any loyalty programmes? What do you think about them? Which do you think are the most interesting? *(loyalty gift rewards, cinema tickets, grocery coupons, etc.)*
- Do you have your favourite stores? What do you like in them?
- Are there any places that you dislike, which get on your nerves? What places/stores have this effect on you? What bothers you in them?
- What do you take into account when doing the shopping?

Probe about the significance of the brand, price, manufacturer (domestic or foreign), the ingredients, the occasion that specific articles are bought for, promotions, etc.

- How do you approach new products? Do you like trying new brands/types? Why?
- How do you usually pay for your shopping? Cash or card usually? Why? In what situations do you choose each way of paying for transactions?

Food

- Now, I'd like us to take a look inside your fridge . . . The moderator takes photos of the inside of the fridge.
- What's there to eat in here? And what's there to drink? What products can we find in here? What brands? Why these specifically?
- Do you always buy the same products?

If yes:

- Why?

If no:

- What makes you change the products/brands that you buy? And what do you change them to?

The moderator probes whether this concerns a strict group of brands or if the choice is more random.

- What does this depend on?

The moderator seamlessly moves on to talking about food and dietary habits.

- Could you please describe your dietary habits to me? How would you describe your eating style?
- What's particularly important to you in nutrition? What kind of food do you try to eat? And what do you try to avoid?
- Can you think of an example of healthy/nutritious eating? And now, an example of unhealthy eating? How do you differentiate between the two?
- What, in your opinion, makes a product nutritious and what makes it not very nutritious? Can you think of any guidelines that could help you in this?

The moderator probes about healthy food, organic food, functional foods, dietary supplements.

- How important is this to you?
- And what about preparing food and meals? How does this look in your life? How do you cook in your home? Using what ingredients?
- Do you use ready-made meals?

If yes:

- What kind? In what situations? Why?

If no:

- Why don't you use such products?
- Do you have any sweets at home? Why? Is this an important product category for you? Why is that?

Cosmetics/toiletries

- Where at home do you keep your cosmetics?
- What kinds of cosmetics or toiletries do you have at home? Why these products (types, brands)? What are their benefits/what do they do?

The moderator takes photos and, in the meantime, starts up a discussion about taking care of oneself.

- Why do you use all these products? What are their benefits/what do they do?
- What does taking care of oneself mean to you? How important is it to you?
- Apart from using these products, do you do anything else to take care of yourself, your appearance, complexion, etc? What? Why? In what situations?

Clothing

- Where do you get your clothes, in what shops? Why do you choose these shops in particular?
- Are there any shops that you avoid? What kind? For what reasons?
- Where would you shop for clothes if you had no constraints? Why there specifically?
- How much do you spend on clothes on average (per month/per year)?
- When was the last time you bought some clothes for yourself? What were they? Where did you buy hem? How much did they cost?
- Can you show me your favourite everyday item of clothing? Why do you like it?
- Can you show me your favourite item of clothing for special occasions? Why this one?

The moderator takes photos.

8. Free time, the media (30 minutes)

Aim: *Understanding how respondents spend their free time – if they have an active or passive approach; what parts of their lives involve the use of new technologies and what impact do they have on them.*

The moderator refers to the task themed "My free time, my places" collage from the diary (Pre-task 3):

- The next task that you had to carry out was the "My free time, my places" themed collage. Did you find this task difficult? Why?
- What have you included here? Why these pictures/drawings?
- What did you want to express through them? What do these pictures bring to mind? What do they symbolise?
- What kind of places do we have here? Why these specifically?
- Do these places change over time? Would you have identified the same places say, ten years ago? What is the reason for this?
- Is the present way of spending your free time different in any way from how you used to spend your free time ten years ago? What would you say are the main differences? Why do you think this is the case?

Television

If watching television was included on the collage, the moderator probes the topic further; if not, he/she starts this topic:

- Do you watch television?
- What kinds of programmes do you like watching the most? Why them?
- How often do you watch them? What did you watch yesterday?

- And are there any programmes that you dislike? For what reasons?
- Do you feel that there's something missing from the programme offer? What kinds of topics would you like to see more of for television to be more interesting for you?

The moderator places pieces of paper with the names of television series/breakfast shows in front of the respondent:

- Here are a few series/breakfast shows that are currently on television. Could you rate them in terms of those that you'd like to watch the most and those that you'd like to watch the least?
- What is your first preference? Why?
- What is in second place?
- . . . .
- What's in last place? Why is that? Who do you think this series/programme is for?

Newspapers/magazines

If reading newspapers/magazines was included on the collage, the moderator probes; if not, he/she starts this topic:

- Do you happen to read newspapers or magazines?
- What kind of newspapers or magazines do you like reading the most? Why them?
- How often do you read/buy them?
- And are there any newspapers or magazines that you dislike? Why is that?

The moderator places pictures with the covers of some random newspapers and magazines in front of the respondent:

- I've got a few newspaper and magazine covers here. Could you put them in the order that you would most like to read them, ending with the one that you'd like to read the least?
- What did you place in first place? Why?
- What did you place in second place?
- . . . .
- What's in last place? Why is that? Who do you think this newspaper/magazine is for?

Radio

If the collage included listening to the radio, the moderator probes; if not, he/she starts this topic:

- What kind of radio programmes do you enjoy listening to the most? Why these?
- How often do you listen to them?
- And are there any programmes that you dislike? Why is that?

The moderator places pictures with the names of radio stations in front of the respondent (if they don't raise the topic themselves):

- I've got several radio stations here. Could you please put them in order of the radio stations that you'd most like to listen to, down to the station that you'd least like to tune in to.
- What is in first place?
- What is in second place?
- . . . .
- What's in last place? Why is that? Who do you think this radio station is for?

Internet

- Do you use a computer? Why? For what purpose? When?
- Do you use the internet? When and for what purpose?

Next, if respondent uses the internet the moderator asks about websites, e-mail, social networking sites, online shopping and auctions, instant messaging services, internet communicators, and online banking (concentrate on last experiences and not only on general declarations).

Holidays

- How do you usually spend your holidays? What do you do?
- Let's go back to your last holiday. What was it like? Where did you go? What did you do?
- Would you say that this a typical way of spending your holidays and are you happy with it? What are the positive things about it? Are there any things about it that are less positive? Why?
- If you were to imagine your ideal holiday, what would it be like? What would you be doing during it? Where would you go? And who would you go with?
- What would be the best thing about this kind of holiday?

The "offer"

- Do you think that there are opportunities for spending free time offered by various kinds of institutions (district, town, or city hall, religious organisations, etc.)? What kind of things do you think they could offer?

The moderator probes: senior citizens' clubs, clubs organised by religious organisations, hobby or interest clubs, universities of the third age, charity organisations, workshops and events in cultural centres, agricultural clubs/rural housewives' association, etc.

- Did you know about these opportunities? Where did you find out about such opportunities? What dosuch opportunities consist of?
- Would you say that they're an interesting option? Why?
- What do you find interesting? Why is that? And what puts you off?
- Is there anything that you would like to see that is not yet available? What exactly?
- What should be included for you to find it interesting? Why?

The moderator presents propositions of various kinds of activities for senior citizens on separate pieces of paper and discusses them.

- Do you happen to spend your time in this way?
- Which of these forms of spending free time do you like and which do you dislike? Please put the cards in order starting from those that you like and ending with the ones that you dislike.
- What is it that you like about this way of spending free time?
- What is it that you dislike about this way of spending free time?

9. Closing (5 minutes)

This was everything from my side.

Is there anything what you would like to add?

Thank you very much.

Appendix 2

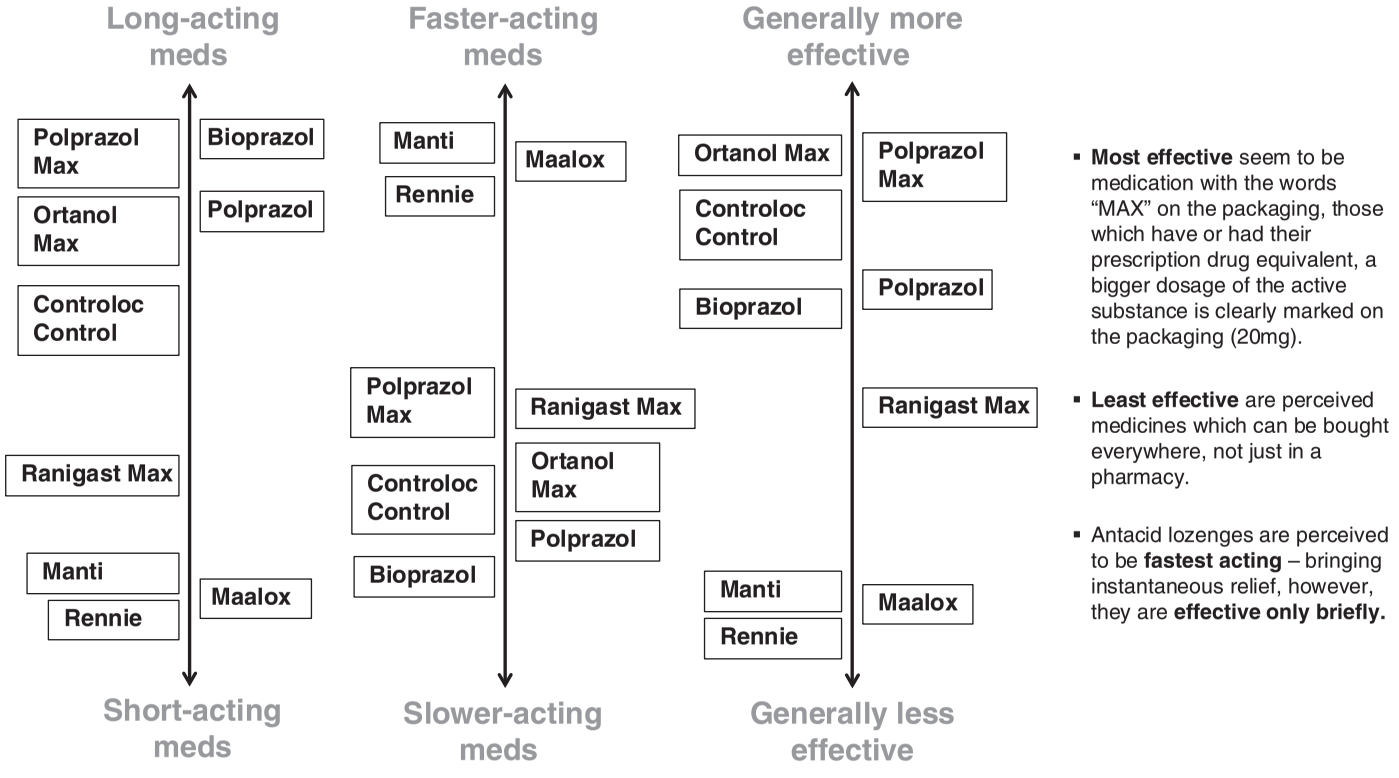


Figure A2.1 The perception of heartburn relief medication (OTC) from the perspective of three dimensions (based on six focus group interviews with users of different brands) – an example of presenting the results.

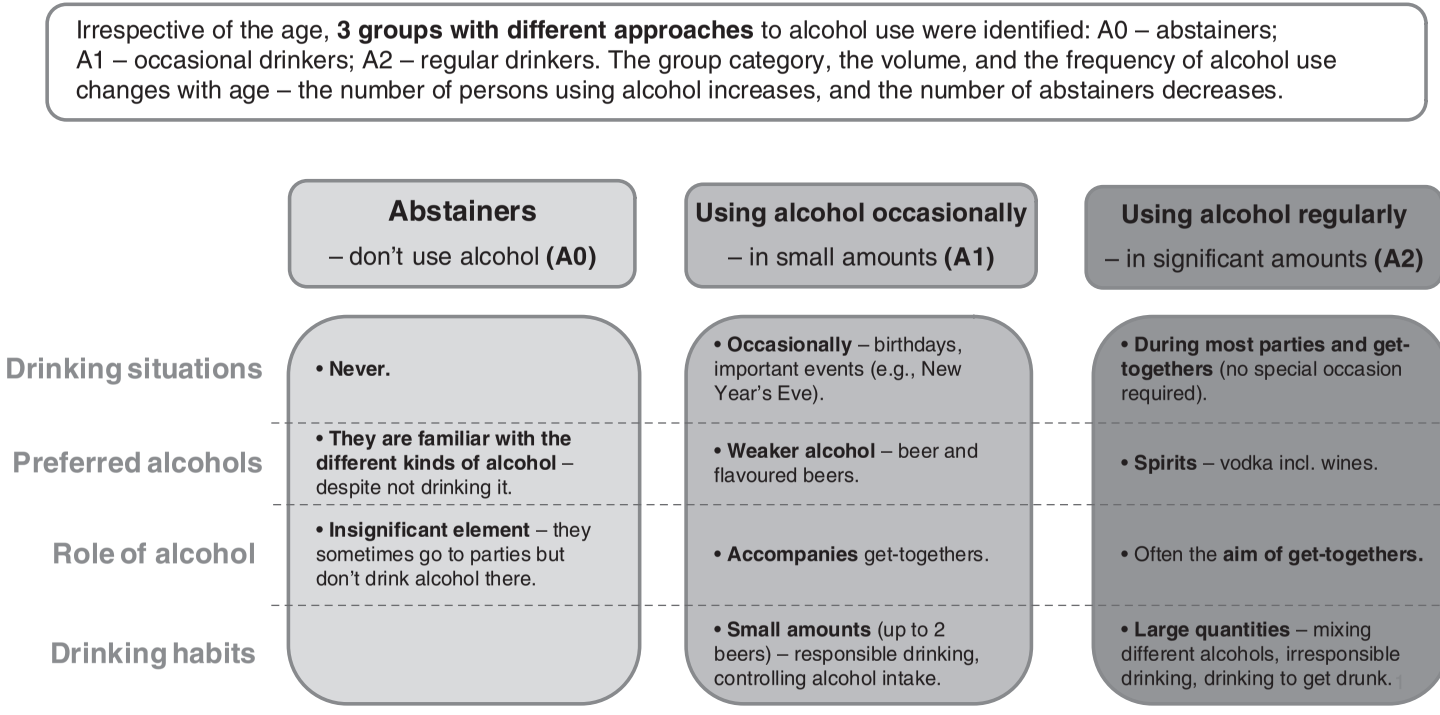


Figure A2.2a The role and style of adolescent alcohol use. An example of presenting the results of qualitative research on the use of alcohol by adolescents (three-week MROC – market research online community, n = 54, youth aged 12–15).

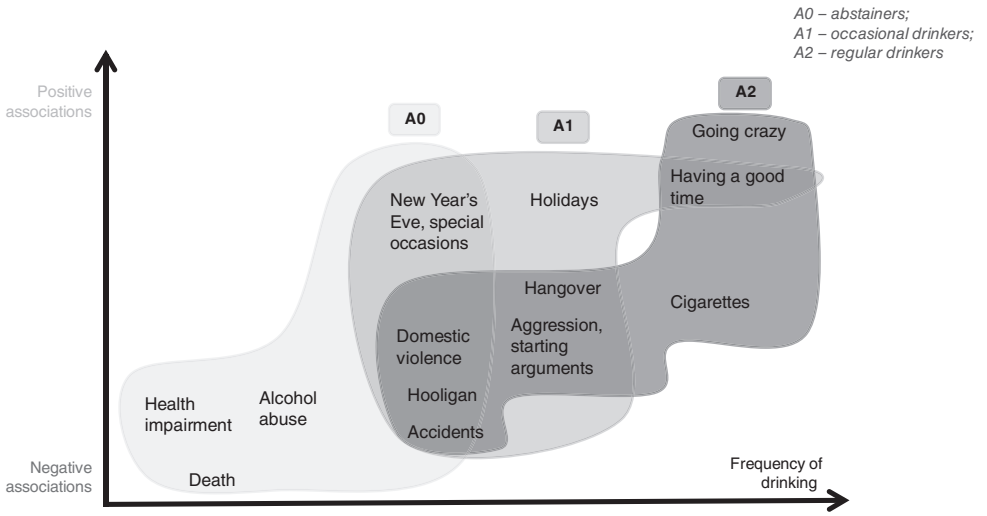


Figure A2.2b Associations with alcohol depending on the intensity of the drinking (Groups A0, A1, and A2). An example of presenting the results of qualitative research on the use of alcohol by adolescents (three-week MROC – market research online community, n = 54, youth aged 12–15).

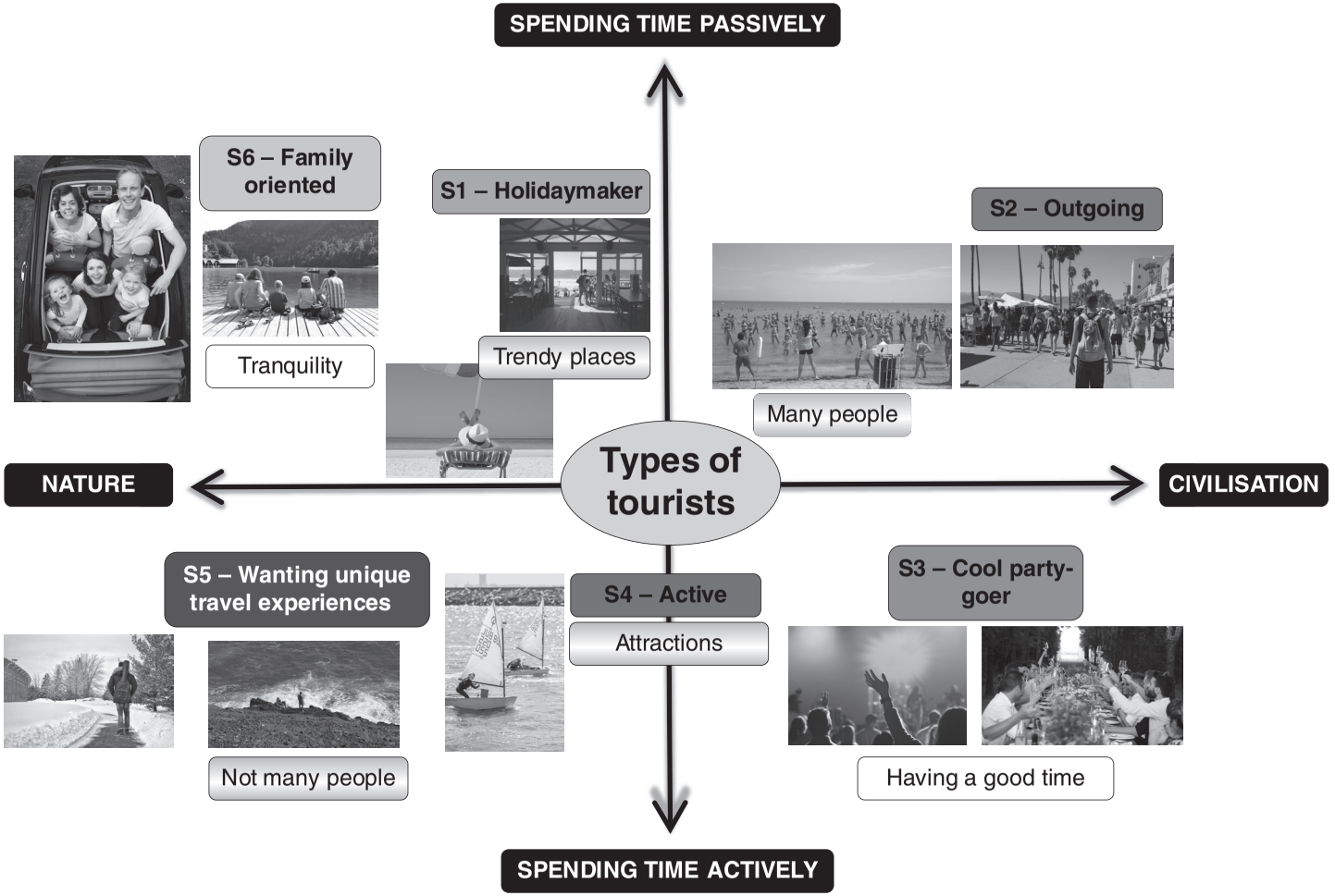
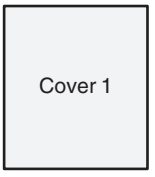


Figure A2.3 Types of tourists (segments S1–S6) and their key vacation needs (analysis of dimensions: spending time passively vs. actively, and nature vs. civilisation). An example of a visual presentation of the results of qualitative research on the tourist needs (eight focus group interviews with tourists and eight individual in-depth interviews with tour operators).

	MATERIAL 1	MATERIAL 2	MATERIAL 3	MATERIAL 4
Strengths	• Aesthetic presentation • Clear font	• Aesthetic presentation • Attractive and eye-catching graphic design solutions	• Approachable • Succinct useful information	• True stories • Easy to understand message • Suitable form
Weaknesses	• No convincing arguments • Difficult terms used at times • Articles are too long	• Difficult, specialist language • Misleading brochure title	• Impossible to understand definitions and terms • Difficult, specialist language	• Written too naively • Oversimplifies cashless payments (showing them to be too easy)
Language	• Fairly difficult "financial" language (except "FAQ by pensioners …")	• Very difficult, specialist, and complicated financial terms, comprehensible only to specialists	• Language was difficult or impossible to understand at times (e.g., definition of a charge card)	• Simple, everyday, and very clear language not reserved to financial matters
Graphics	• Aesthetic and clear brochure (suitable font size) but Polish people didn't relate well to the photos used (not "typical" low-income Polish OAPs)	• Interesting graphic design solutions (comic strip form), but this form is not appropriate for elderly recipients (small and illegible font)	• Very handy and easy to use "pocket" form but with an unclear objective (intended for home use or to carry in wallet/purse)	

Figure A2.4 Assessment of tested advertising materials for a campaign promoting cashless payments (holding a bank account, use of payment cards) addressed at people over 60. Research for the Polish National Bank, 30 in-home individual in-depth interviews. Example of data presentation.



- **Six issues** discussed only partially on the first page (continued on following pages) gave the impression of **chaos and fragmentation**.
- **Name of the newspaper does not stand out** from among the text titles (newspaper title takes up a tiny fraction of the cover, and its font isn't much bigger than the font of article titles).
- **No teasers** helping the reader navigate around the most important topics of the day.

THIS VERSION OF THE COVER GIVES THE IMPRESSION OF BEING AN INSIDE PAGE, NOT EYE-CATCHING, OVERWHELMING

- **Discussion of three issues** makes the first page look **clearer and neater**. More fitting to the **cover of a newspaper daily** form (three articles and brief teasers of articles covered).
- **Name of newspaper** is definitely **more visible.**
- Additionally, putting the title in a vertical layout **makes the newspaper stand out**, making it different from other competitive newspapers and more modern.

THIS VERSION OF THE COVER IS MORE EYE-CATCHING, EXPOSING THE TITLE AND BETTER MEETS COVER EXPECTATIONS

Figure A2.5 Evaluation of two versions of the cover of *Dziennk Gazeta Prawna* (*DGP*), a newspaper published in Poland focusing on economic and legal affairs. Research concerning a new layout – six focus group interviews, readers of *DGP* and readers of competition.

Index

Note: References in *italics* are to figures, those in **bold** to tables.