

Martyn Richards, Qualitative Researcher, Martyn Richards Research

An introduction to qualitative research

Martyn Richards is an experienced qualitative researcher, whose key clients include Guinness World Records, Norwich the Theatre Royal, Sainsbury Centre for Visual Arts and Roald Dahl Foundation. Previously he was an actor, having trained at the Webber Douglas Academy and touring with *Godspell*, *The Taming of the Shrew*, *Great Expectations*. He still directs in his spare time, directing Alan Ayckbourn's *Game Plan* in Norwich in the summer. He has been a regular conference speaker for the AMA in recent years, delivering *Marketing Is in a State of Change* at the Edinburgh conference in 2007.

This session provided an overview of the qualitative research tools available and demonstrated some of the techniques, offering advice on how to carry out the research, which method to use and when expert help might be required.

Qualitative Research – an introduction

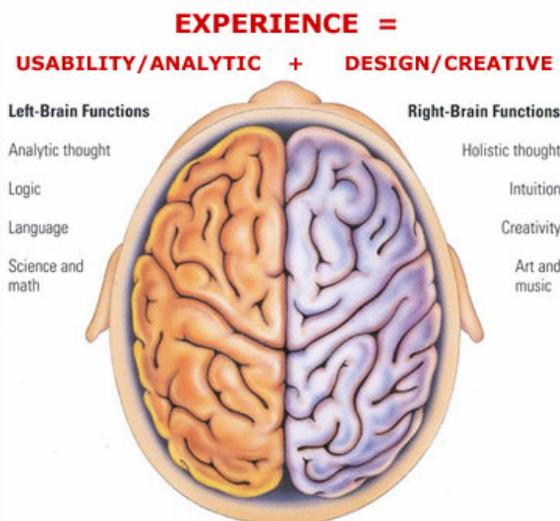
There is a rationale for using qualitative research, beyond the simple finding out of who the audience is and then asking them why they come. There's a lot more that underpins business decisions.

- **Quantitative** Research is designed to help organisational decision-making, focusing on the incidence and statistical relationship of variables.
- **Qualitative** Research is designed to help organisational decision-making, focusing on understanding the nature of phenomena and their meaning, rather than their incidence.

Crucial differences:

- **Quantitative:** focusing on the incidence and statistical relationship of variables
- **Qualitative:** focusing on understanding the nature of phenomena and their meaning

Or put another way, quantitative is left-brain, qualitative is right brain



Qualitative research – the thinking behind it

There are four main areas regarding modern thinking about qualitative research:

- Need States
- Low Involvement Processing
- Neuroscience
- Herds

A definition: *'The complex web of rational, emotional, environmental and personal triggers that lead to brand or product choice.'*

Wendy Gordon, Goodthinking, 1999/2006

Need States

- Shape: Healthy eating 'me'
- M&S Thick & Creamy: Indulgent 'me'
- Sainsbury's: Mummy 'me'
- Total Greek: Sophisticated 'me'

This is based on the premise that consumers rarely make a decision based on rational factors. The rational part of the brain (the pre-frontal cortex) is heavily influenced by emotional stimuli, whether consciously or subconsciously.



Therefore the shopper in the supermarket will pick any one of the highlighted brands, depending on the time, place and the way she is feeling. It is dependent on the need state that she is in at the time. Although this is not very closely related to choosing a theatre or dance piece, the principle is the same.

Low involvement processing

This is the process of understanding what is actually happening in the brain when making decisions. Processing is divided into:

- High involvement processing
- Pre-attentive processing
- Low involvement processing

High involvement processing makes intensive use of working memory; for example, how children process information in the classroom context. High level processing is top-class thinking.

Pre-attentive processing is the opposite: it is in the subconscious and rarely consciously accessed. Pre-attentive processing helps people through tasks and activities that tend to be done automatically, without thought or consideration.

Low involvement processing lies between the two above: accessed through memory, but without needing to think about it. For example, when crossing the road, one can see the bus coming and take that into account when we cross, but we don't consciously think that we had better avoid the bus. It's influenced by the interaction of the memory (in the hippocampus) on the brain.



A memory is a set of connected thoughts in the brain; a good or strong memory reinforces the paths between neurons, so that it stays in the brain.

Therefore what happens when someone is shopping in the supermarket is that the memory comes to bear upon the final choice at the level of low attentive processing. This is why low involvement processing is important in understanding consumers' behaviour and the way that memories are accessed.

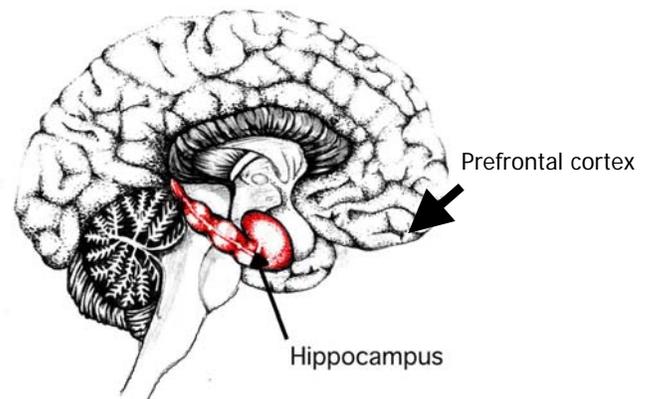
This shows that it's not explicit learning that is important, but the implicit learning; another difference between quantitative and qualitative research: quantitative research is explicit; qualitative research is implicit.

Neuroscience

The most significant research started in 1999, and much has been learned since.

About fifteen years ago, US researchers conducted an exercise on testing Coca-Cola and Pepsi, by putting people in MRI scanners and asked them to test the drinks.

Tested blind, there was no difference, branded testing, the Coca-Cola won every time. So far, this was a familiar exercise, but what was valuable was observing the brain activity: the testers accessed the pre-frontal cortex (decision-making) and the hippocampus (emotional memory store), so the emotional memory prompted choice of Coca-Cola (tapping into the Hippocampus). Now we understand how decision making is influenced by emotion, not rationality.



Herds

Why do people buy the things they do? Because others do. Using the Pepsi/Coca-Cola example again, people buy Coca-Cola even if they prefer the taste of Pepsi, because that's what other people do – it's the herd instinct. We don't want to stand out. We belong in a herd and we show we do by making these kinds of decisions.

Methodologies

If you want to understand the emotional connection that the consumer has with a purchase or cultural offering decision, you need to look to qualitative research.

Identifying the correct methodology for the project in hand is clearly key – a professional's task - and one of the biggest challenges. The consultant needs to write a brief, but getting it right can be very difficult.

There are three main areas of methodology:

- Focus groups
- Observation
- Depth interviews

Focus groups: extended, mini, viewed, conflict, workshop

Focus groups are great for bringing like-minded people together to discuss views and see whether these are shared or disparate.

An extended group would last two to three hours, rather than the standard 90 minutes. This is good for giving the researcher a better 'feel' for the group.

A viewed group usually takes place in a lab, so the client might view it through a one-way mirror. This does give people the chance to go along and see for themselves how customers are talking about them.

Conflict groups: sometimes it is helpful to put together groups of people who have opposing views (usually groups are made up of like-minded people). From this, the researcher can learn the vocabulary people use to describe their experiences.

A workshop might be as much as a full day; it might be a series of extended, reconvened sessions. Most commonly it is used when the researcher wants the people attending to become much more involved in understanding a subject or area. Many party political decisions are taken using the results of workshop discussions. It allows the researcher to discuss implications.

Observation

This is part of ALL qualitative research projects: as part of Immersion/Case Study Interviews; as stand-alone survey – e.g. queuing behaviour. Observation can take many forms. One example is a video ethnography [Samiak Salari's keynote and specialism], in which the researchers spend four or five days with one individual. That's the sharp end of ethnography and observation.

Many researchers use the principles of ethnography, but on a smaller scale. Researchers might watch people go shopping, or eating, or going out to the cinema, cooking or washing their car. These ways of engaging with the consumers when they are making a decision are valuable. Other examples of observation that can be extremely helpful include observing people's body language, the clothes that they are wearing, the books they have in their house, etc.

Much work nowadays is undertaken in the form of case studies, in which researchers use the immersion technique. Researchers spend longer with the consumer, and perhaps in several places (e.g. at home or in leisure spaces). The big difference between this and undertaking a range of depth interviews over a series of days is that the research presents the people as individuals, for example with photographs, to the client. This brings the research alive for the client much more vividly than an amalgam of many peoples' views.

The analogy is with journalism: when a journalist reports on a famine or natural disaster, one powerful example of an individual's suffering or need is more effective in conveying the story than saying that 'ten thousand' people died: the numbers make it impossible to relate to.

Delivering individualised information to the client is very powerful. The client knows that it does not represent the entire audience base, but it is a good way of connecting.

There are also other areas and research methods for looking at human behaviour. An early example is one high street bank that used cameras to observe their in-branch queues. As a result of the research, they changed the queue management systems and used it to market their services. This was clever because previously the queue had been lost time for the bank, but they made it profitable for them. Other banks adopted this approach and now it is common practice to 'work' a queue.

Depth interviews: Paired, tele-depth, immersion, accompanied

In-depth interviews: these are very good for understanding individual thought processes and for sensitive areas such as financial information.

Paired: these can often be used when interviewing children, so that they can attend with their parent or carer and quite often feel more comfortable.

Tele-depth interviews have crept in recently because of cost and although this can be useful, the researcher is not able to establish a face-to-face relationship, observe body language or build empathy during the interview.

Immersion and accompanied: these are becoming seen as interchangeable.

What the consultant/researcher does

The most obvious element comes at the very end: a report, or a presentation, or both. Most clients prefer a presentation, because they want to make decisions very quickly and move on, whereas reports tend to sit on shelves and gather dust. The key is how the researcher gets there.

Delivery

- a) choose method
- b) moderate
- c) analyse
- d) present

A good qualitative researcher will choose the most appropriate method, bringing all their experience to bear in terms of moderating. They will produce a robust analysis of the content and know how to tell a story in order to involve and engage the client, when they present the

findings. There are two membership organisations for qualitative researchers: the Market Research Society and the Association for Qualitative Research. When selecting a researcher, check their website, see who their clients are and talk to other people (word-of-mouth recommendation).

Avoiding the pitfalls

A good researcher will know how to avoid them. They will know how to:

- put the respondent at ease for example, so that the respondent opens up
- look for signs when people are not telling the truth, and how to get under that
- maximise input from everybody in a group, including the quiet ones (and managing the loud ones)
- get behind the masks that people put up when they are in particular situations;

Theory into practice

The group were asked to identify parts of their business that could be aided by qualitative research:

- *Testing the offer.* Making the case for a new venue and opening it successfully.
- *Drop-off.* Knowing why people have stopped coming to a venue.
- *Non-attenders.* Understanding why a venue finds it difficult to engage with sections of the community or specific communities, in a local authority context
- *Non-returners.* Understanding why people do not come back to a venue; what it is about the venue that stops them: understanding the experience
- *Families.* How a museum could engage in more depth with families and understand why they go, what they do, why, and how to communicate with them better
- *Decision-making.* Understanding the process and then making strong management decisions
- *Competition, position and collaboration.* Helping a soon-to-open venue understand the current programming and provision mix from other venues and identify their position and opportunities to grow audiences

Some of the modern qualitative research techniques, such as accompanying people on visits, can be very effective at providing solutions to some of these issues.

There are two more areas where qualitative research is especially effective, more so than quantitative research:

- *Communication.* Whatever form of communication it is, qualitative research is very effective at testing it, understanding how different methods are perceived and may or may not be acted upon by customers. Qualitative research should be seriously considered whenever planning, reviewing or changing communications.

- *New ideas.* Qualitative research allows us not only to test new ideas, but also to take it back a stage. This means that researchers might convene sessions with clients as well as with customers to identify potential routes forward in the future. These can be very beneficial for an organisation and can be tested through qualitative research

[Focus groups were then demonstrated by practical break-outs, to help delegates understand the process of identifying the appropriate methodology for each of the issues identified above]

Selecting the most appropriate methodology

Testing the offer: this is a case where quantitative works with qualitative research as well in a phased process (quant, then qual, to explore in depth).

Non-attendance: focus groups are a good solution for this situation. Observation can also be a good methodology for analysing non-attenders. The research could identify people who have not been for a while and provide them with tickets to visit the venue and then answer questions afterwards. This allows the research to get to the nub of the issue.

[Delegates were arranged in groups according to the number of AMA conferences they had attended, and conducted a whistle-stop focus group about the AMA.

Normally more time would be spent warming up the audience with subjects that were not important to the brief, but obviously there wasn't time in the remaining 20 minutes of the session.]

What would you say are the key attributes of an organisation like the Arts Marketing Association?

- Sharing views
- Social aspects

what other qualities should it have?

- Approachable
- Knowledgeable
- Professional
- Promote excellence

The groups were then asked to rank the six most important attributes:

1. sharing views
2. knowledgeable
3. approachable
4. professional
5. promote excellence
6. social

This is one way of taking apart the information, pulling it to pieces, and then asking people to put it back together again.

Which other professional organisations do members belong to?

- Chartered Institute of Marketing

- RAC
- the Co-op

Using the RAC as an example, the group discussed which attributes that organisation shares with the AMA:

- professional
- knowledgeable
- approachable

Then a focus group would be asked to explain why they had made these choices, and so on. Ranking and sharing attributes are two of the simpler elicitation techniques that researchers use. This approach is quite downwardly focused, where researchers get people writing things on pads or charts, cutting out magazine pages, creating collages, etc. These techniques encourage people to find a way of expressing something that they feel about a project or a situation, without having to rationally underpin it.

Recruitment

1: homogeneity = harmony; ease of discussing with others

2: homogeneity = analysable feedback

Normally, researchers recruit with homogeneity in mind. There are two reasons for grouping like-minded people together:

- a better group in terms of dynamics, relating to one another and ways of discussing the subject
- a homogenous group provides better quality analysable feedback

However, if the client has discovered some gender or age differences, for example, in the customer base, then a specific group can be valuable. On the whole, though, researchers would recruit a homogenous group.

[In-depth interviews were then demonstrated with a volunteer (first time AMA conference attendee). Using the conference experience as the subject, 'warm-up' and welcoming techniques were used, such as asking the interviewee's about job, role and ambitions. The interview worked through swiftly, but covered feedback on the social events, the catering and the suitability of the venue, opportunities to meet new people and networking. The interview took five minutes and yielded a great deal of information (which could all be probed further). A few notes and observations on the use of body language, questioning format and techniques included:

- starting a sentence and leaving the other person to answer it
- negative and positive reinforcement of responses through language
- mirror technique with body language, for example, by crossing legs in the same way,

Projected techniques are also useful; people are encouraged to respond on others' behalf, for example, by opening a sentence with 'what do you think people would say about...?' or 'People have said that... how do you feel other people think?'

Vocabulary is another important aspect, which makes good transcription very important, so recording or video-ing interviews, taking notes, etc are crucial, because they provide a foundation and evidence for what is reported.

The group was warned not to be obvious with any particular technique and advised to be subtle: one can use positive reinforcement like congratulating someone on their work.

The average cost of qualitative research

4 standard focus groups, ranging from £2k to £12k (2k, 6-8k, 12k)

A breakdown (costing sheet) showed how the researcher would arrive at a price for the client. Although the total looks expensive, a small proportion goes to the researcher (£50 per hour). On the other hand, an audience development agency has promised to recruit, deliver and report on a focus group for £500.

Task	Hours/cost
Meeting	1.5
Project management	10
Recruitment	£1,200
Topic guide	3
Moderation	6
Travel time to meeting	6
Travel time to groups	4
Travel costs to groups	250 x 40p
Incentives	32 x £30
Hotel/subs/overnight	2 x £120
Transcription	360 x £1.25
Analysis	12
Presentation writing	10
Presentation	1.5
Travel to presentation	6
Report writing	12
TOTAL HOURS	72
TOTAL COSTS	£2,950

15 depth interviews costs around £6.5k, 18 depth interviews, 6 being case studies c£10k

Qualitative research is about insight, including exploration of emotional reactions and memories.

It is not recommended to undertake DIY qualitative research, but organisations can do these things themselves:

- Consultation exercises, as long as it is clearly understood that this is not the same as qualitative research
- Qualitative tools, such as asking customers to keep a diary about their experiences relating to something
- Observation: ticket queues, watching the way people behave in the bar etc. Photographs can also be helpful for this.

Analysis of what has been gathered may be the point to seek professional assistance.

The briefing process

Organisations often follow a tendering process, but this is not always the best course of action for the piece of work:

- Firstly, the quality of the brief affects what a researcher can do. It can restrict original thinking and then reduce the selection criteria to just one: cost.
- It is entirely appropriate to use a known consultant in some cases, but if not, then it is helpful for both parties if the consultants being interviewed or considered are able to visit, spend time with the team and get to understand the project.

One final piece of advice: treat researchers as your friend and a resource.

Questions

How do you create focus groups that engage with young people?

It is difficult to work with this age group; focus groups are often not as effective as depth-interviews (either single or paired) and case studies.

Can you describe the process of taking the raw information and analysing it?

Different researchers have different ways of doing this. Some researchers don't use transcriptions; they listen to the playback and make notes; some make a map on the floor and start filling it in with writing. The analysis begins during the work itself, and researchers will start to compare, contrast, and rank the information.

How many depth-interviews would you need to have a useful data set?

The nature of the project and the type of people being interviewed would influence numbers. With a relatively homogenous group, one might say 12 depth interviews otherwise it could be 18. Focus groups should not have less than four people. Just as important as the number of people, researchers need to have the *right* people to speak to.