

Seminars: Strategic Workshops

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So you think you need a focus group?

Lisa Baxter is an arts marketing consultant working on projects involving strategic marketing, brand development, new product development and qualitative research. Qualitative research projects include new product development for Preston Museums Consortium, research for Bradford Community Housing Trust to explore the viability of purpose built 'live / work ' units for creative practitioners, brand perceptions work for Leeds Grand Theatre, Asian Theatre School, Script Yorkshire and RJC Dance and a national programme of research for the Institution of Occupational Safety and Health. Lisa is an associate member of the Market Research Society and a member of the Association of Qualitative Research.

This seminar looked at the reasons for undertaking qualitative research. Using examples from her work in the arts sector, Lisa explored the pros and cons of different qualitative research techniques and demonstrated how to use the insights gained to inform our planning.

We have ways of making you talk!

Many people say they want a focus group but they don't. There a variety of tools which can be used to reveal interesting insights about our customers.

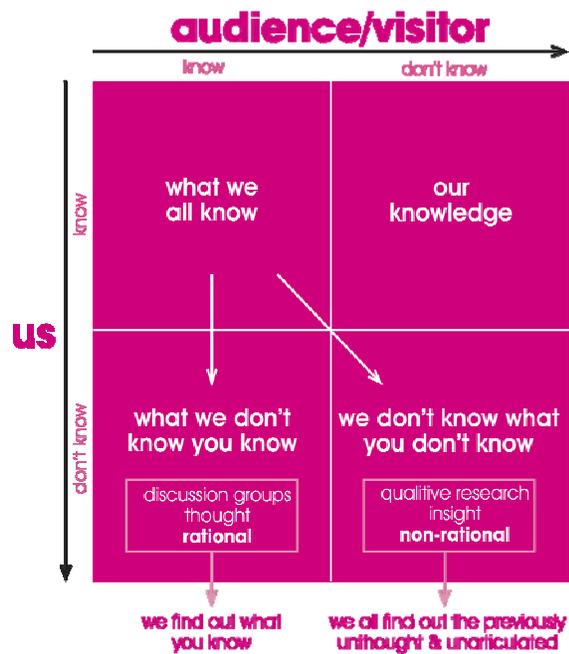
Another misconception is the idea that the higher the number and wider the range of questions which are asked, the greater will be the understanding gained. However, depth is gained through focus on a defined area of investigation.

How Deep is Deep?

It is important to ensure that the research method is appropriate for the customer and that which we want to know. Using the JoHarry window (right) illustrates the areas in which qualitative research is most useful.

Discussion groups might be what you are looking for as they are good for harvesting information and articulating top of the mind and surface material. It has use, but it is not a technique in which deeper truths are uncovered. It is about gaining rational answers to rational questions.

Qualitative research using focus groups on the other hand provides the opportunity for mining and exploring, uncovering deeper truths and revealing previously unarticulated ideas. It is about gaining insight into intangible areas and the previously 'unthought'.



Focus Group Toolkit

There are many techniques which are used by the qualitative researcher, some being deductive, analytical, cognitive and some more metaphorical, sensual, creative, emotional.

- Probing and elicitation techniques: good for discussion groups or warming up in focus groups. It's about digging a little deeper – truer and fuller – rather than taking the first answer that people provide. Using reframing, in which a question is asked in a different way or a point interpreted using a different angle are good ways of moving beyond the pre-prepared answers that many participants have.
- Projective techniques: designed to make hidden meanings more explicit. Especially useful in branding work using personification – assigning human characteristics to products or brands. Another technique, psycho-drawings, involves people drawing experiences and then explaining why they have drawn them in this way.
- Structured techniques: if a particular end-point is required, such as in brand mapping, themes, hierarchies and positioning. Participants are asked to order and place.
- Creative techniques: an extension of projective techniques, helping people to produce personal metaphors, breaking down hollow adjectives such as 'exciting'.
- Fluid groups: asking a couple of open questions then using probing and elicitation seeing what kind of themes and issues emerge.
- Incubation: not relying on blind spontaneity but preparing people and heightening their sensitivity to the issue to obtain a more informed response. It could mean giving people tasks beforehand such as producing a diary or developing a mood board.

The point of the toolkit is to achieve greater authenticity in the responses received and bring to awareness the hidden insights that other research methods cannot access. This then enables us to learn about:

- Beliefs, values and ways of life: good for attitudinal segmentation
- Perceptions and attitudes: how is your brand perceived? Recognition and resonance.
- Needs: how do we meet customer needs?
- Behaviours, motivations and barriers: practical and perceptual barriers to attending
- Decision-making process: how do your marketing strategies help customers to make informed decisions?
- Experiences and impacts

Application of findings

Qualitative research puts in touch with the humanity of our customers. We can then better communicate with them and know what it is they should be offered. It can be applied in a variety of ways:

- Brand development
- Programme development
- Marketing and communications
- Targeting and segmentation
- Relationship marketing
- Customer orientation

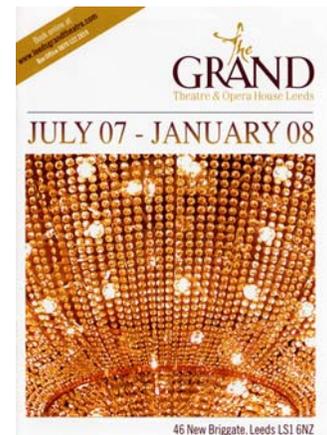


As an example, at Leeds Grand Theatre, the research brief involved an exploration of attitudes to programming and the brand equity of the organisation. It's a beautiful traditional building with an extremely varied programme which was going dark for capital development.

Each target group that was spoken to only bought into a very thin slice of the theatre's work which they believed to be a very high quality. However, they were not complimentary about the rest of the programme (although they appreciated that the programme needed to exist in order to satisfy a wider range of tastes and make an income).

No clear brand identity could be articulated, mainly because the programme was perceived as being so varied and each segment was only tapping into a specific thin slice. However, every single group loved going. They thought it was unique, special, glamorous and a wonderful night out. A key brand personality that was revealed was that of Mae West – getting on a bit in years and rough round the edges - but hasn't essentially lost her looks.

As a result of this research the brand proposition became: 'A Grand Night Out'. 'Grand' has resonance as a Yorkshire word and it also rang true with the re-development of the theatre – it was to be even grander. It took the focus away from the programme and instead capitalised on the unique glamour and history of the building and the perceived high quality of each programming strand. A cohesive visual identity was created around the 'grand-ness' of the Grand.



Drawbacks of Focus Groups

- Unquantifiable: don't offer statistical validation, indicative rather than definitive, exploratory rather than conclusive
- Preconceived ideas: people come with a bag of ideas and an agenda and good moderation skills are required to break this down
- Reconstructed memory: different people remember things in different ways, automatic behaviours and detailed memories are difficult to recall
- Group think: peer pressure to say the right thing rather than what they really think
- Share of voice: danger of hijacking of groups by one or two people

Q. How do you choose who you decide to work with?

LB. It depends on priorities and desired outcome. This leads directly on to deciding who are the people best placed to provide insights. It could be the next stage on from an initial exercise, as a result of doing a mosaic exercise on your audience and then identifying a group to work with. It's important to invest in professional recruitment and to incentivise the attenders properly, probably with money. Focus groups are not cheap but they do deliver value for money.

Q. We are interested in discovering why people buy tickets in certain places. We'd like them to buy more tickets through us. Can focus groups help with this?

LB. Focus groups could help you discover how people buy things but you might find a simple survey or customer circle would provide what you need as it may not be necessary to go particularly deep.

Observational Research

Observational research is observing a location and what people do in that location. This might mean using lots of observers all over a building observing from different vantage points or accompanying and following people.

The value of observational research lies in being able to get closer to the experience, focus on what people do rather than what they say they do, capture spontaneous action and 'moments of truth' and provide insights which can't be accessed from focus groups.

However, observation can mean only seeing a partial picture and it has to be subjectively interpreted, perhaps leading to the wrong conclusions. In order to overcome these problems, one way of dealing with this is to interact with the subject.

Ethnography

Interaction enables a closer and more accurate picture to be gained. It has been used for decades by social anthropologists and behavioural psychologists and increasingly used in commercial research. Ethnography enables you to test your assumptions and find out what's really going on, explore behaviours more deeply and add extra meanings to your observations.

By using this methodology the researcher is able to understand feelings, thoughts and decisions, so that what is observed is not merely taken at face value.

It has been used effectively in museums and galleries, providing background information on the way that visitors engage with the work so that layouts and the style and content of activities can be enhanced.

For example, an ethnographical research project with Preston Museums (National Football Museum, the Museum of Lancashire, the Harris Museum and Art Gallery and the Museum of the Queen's Lancashire Regiment) aimed to look at the family offer which would positively impact on the learning and engagement of families. They wanted to overlay family learning elements on top of the already existing products. Rather than using focus groups ethnographical methods were used in order to achieve the following objectives:

- To gain an understanding of the family dynamic and quality of experience at each museum
- To evaluate whether families look at, learn from and engage with the exhibits in a more meaningful and enjoyable way
- To evaluate the effectiveness of the family offer and gain insights into how to improve existing provision

Methodology involved a combination of observational research and ethnography based on letting the participants test new prototypes in situ, quite simply done. The research began with existing family visitors as they were confident and it enabled comparisons between the old and new approaches to be tested. Observers were dotted around the museum and given specific checklists and observational objectives. The families then took part in post-event discussion groups.

The same was then done with 'less confident families' who were not used to going to these or any museums, specially recruited from local children's centres.

Following this initial stage, successful offers were developed and semi-successful ones refined and then the entire research process was repeated.

After further testing, final product refinement was undertaken, followed by a full launch.

The main qualitative learning outcomes at the National Football Museum were:

- From the observations, there was evidence of
 - positive family interactions
 - high degree of family involvement with the activities
- From participants
 - the family offer helped them talk and play more as a family
 - parents pleased with concentration / behaviour of children
 - developed a better understanding of football through the activities.
- Evidence of 'tunnel vision'
 - children wanted to charge from one activity to the next
 - need to broaden focus and make 'meaningful connections' with displays.

At this point, delegates were asked to think about ways in which observational and ethnographical research could be used in theatres

- Layout of front of house – is there a decompression zone? If you have all your leaflets and posters at the door, people walk past them and don't take notice
- Flow and dwell times (eg. in front of leaflet racks)
- The way that people act during intervals in bars etc.
- Interaction with staff

It was pointed out that it is always necessary to be transparent about what is happening, it's not about 'spying'.

Creative Idea Generation

'Innovation is the generation of new ideas – either new ways of looking at existing problems or of seeing new opportunities.' Sir George Cox

This method is about applied innovation; taking ideas and putting them into practice. It can be used to inform new product development, interesting creative business propositions and solve strategic and tactical problems.

The stages within this process are:

1. Incubation: defining the problem and warming people up.
2. Generating a large number of ideas around agreed problem or theme: free-wheeling generation, suspending judgement in positive environment. Followed by clustering of themes and selection of best ideas.
3. Evaluating: do these ideas have legs? How can they be made implementable?
4. Plan for action: what will you do which will make this happen?

It is vital to keep up momentum as you move through the stages but occasionally, the group will hit the wall and progress will stop. In these circumstances a facilitator needs to have a creative toolkit to deal with the situation

- SCAMPER – substitute, combine, adapt, modify, put to other uses, eliminate or reverse the idea
- By forced association in which something completely unrelated is introduced into the mix, opening up new thinking
- Shifting perspectives – looking at the issue from the perspective of someone else or imaginary creatures for example
- Combining ideas – take two ideas and put them together
- Brain writing – each person adds on to the idea of the person before hand, moving a piece of paper along a conveyor built

Creative idea generation provides time for you to think creatively around an issue, getting out of a rut and to generate new rather than re-evaluating old ideas. It can revitalise your thinking, encourage team building, energise your organisation or to bring insight to life.

Application of Creative Ideas Generation might include:

- Programme and service innovation
- Developing and shaping brand experiences
- Solving practical and strategic problems
- Developing values, missions, aspirations
- Strengthening your competitive advantage
- Devising imaginative, creative marketing campaigns

Some of the ideas that came out of the Preston Museums group (Harris Museum) included having a dressing up box with other members of the family drawing them, enabling them to empathise about the way that portraits were done.

CIG may not be appropriate for organisations which are risk averse (though they might be the ones who need it the most) and they need to be conducted with realism about what can be achieved.

Summary

- **Focus groups are...**
 - Reflective = past behaviours and mindsets,
 - Provide rich insight.
- **Observation and ethnography are...**
 - In the moment = current experience,
 - Gets you closer to the context of the experience,
 - Reveals insights focus groups cannot.
- **Creative idea generation is...**
 - Projective = future developments,
 - Fuels innovation.

Q. Do organisations keep up continuity with the participants after from the qualitative work is over?

LB. It's very much about the action planning which follows from the qualitative work, some of which is down to the organisation itself. This might involve keeping the people involved once the particular project is over and in the future. The key question which the client needs to answer is what are you going to do tomorrow with this information?

Q. How does it work with the outputs produced? What do you provide for the client and how much interpretation is done?

LB. I regard myself as a qualitative consultant and like to be involved in the whole process: defining, conducting, interpreting and recommending. I like to give actionable insights and preferable to have a much longer term relationship with the client. When you are looking for a consultant look at their experience and credentials.

Q. Do some people undertake qualitative research without needing it?

Look at what you already have and especially consider whether the research be actionable. Ensure that everyone in the organisation knows what you are doing and why.