

Departamento de Economía financiera II
(ECONOMÍA FINANCIERA Y CONTABILIDAD, COMERCIALIZACIÓN E INVESTIGACIÓN DE MERCADOS)

MARKETING RESEARCH: AN INTRODUCTION

Unit 3: Qualitative Techniques for data gathering and analysis

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Objectives of unit 3:

- To understand the usefulness of qualitative data collection and analysis techniques in the marketing research process.
- To know the types of qualitative techniques and their general classification.
- To understand the possibilities and limitations of qualitative techniques.

3.1.- Justification for the use of qualitative techniques

- **Research has not been completely defined.**
- **We do not have sufficient working hypotheses yet.**
- **We have too many hypotheses or possible responses, and want to rule some out.**
- **We need the advice of one or several *experts* on a specific topic.**

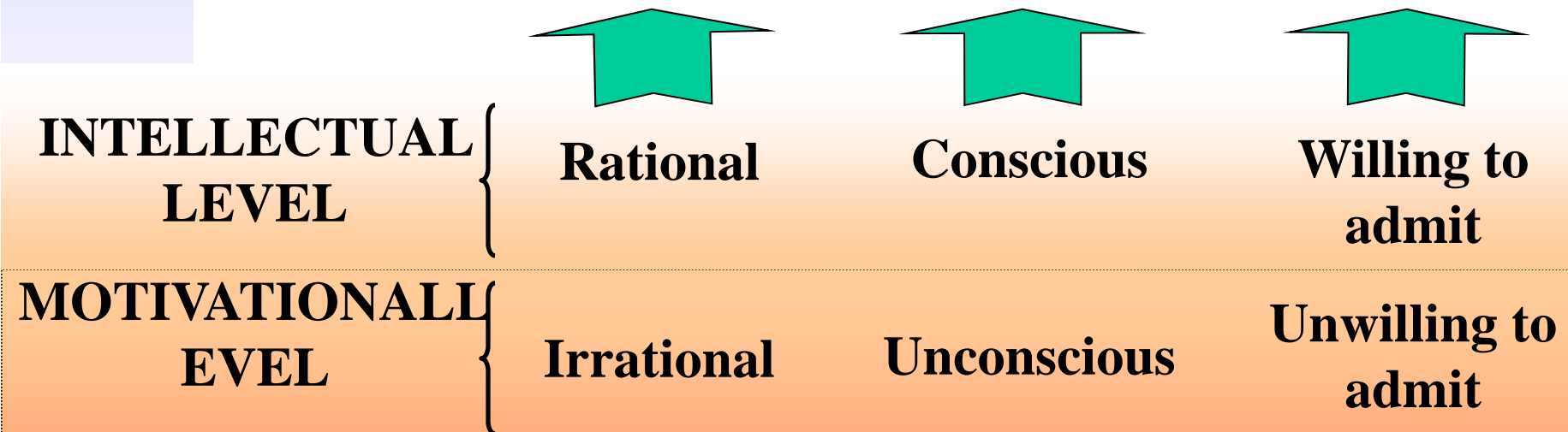
3.1.- Justification for the use of qualitative techniques

- **We need to collect information regarding motivations, attitudes, tastes, opinions, etc.**
- **We are interested in finding out the causes or reasons for certain conducts.**
- **Interviewees may not even be conscious of something, or may be reluctant to admit it.**

3.1.- Justification for the use of qualitative techniques

TYPES OF MOTIVATIONS

SUBJECT'S BEHAVIOUR



Qualitative data collection techniques

Allow researchers to detect the reasons for certain consumer behaviours. They collect data that quantitative techniques can't collect: information about the *reasons* for customers' or users' preferences for a certain brand, their *attitudes* toward a certain establishment or product, their *motivations*, etc.

Qualitative data collection techniques

Direct:

Group dynamics

Interview (centered on the issue)

Indirect:

Projective techniques:

**In-depth interviews
(centered on the person)**

Observation?

Word association test

Sentence completion test

Cartoon test

Basic roles in group behaviour

TORTOISE	Rigid attitude, fixed ideas, obstinacy, weak personality, insecure, do not normally integrate in the group...
SWAN	Narcissistic attitude, place importance upon their physical appearance, believe they are superior, even though they have a weak personality, do not integrate...
GOAT	Contradiction, continuous opposition to everything and everyone, failure experience, weak personality...
ELEPHANT	Passive attitude, realistic and objective individuals, need constant motivation...
SNAKE	Manipulative attitude, introvert and intelligent, adapt well to the environment, ambitious, seek to replace the group dynamics co-ordinator...
RABBIT	Shy attitude, anxious and insecure, adolescent character, timid yet original contributions, inferiority complex...
OWL	Rational attitude, know-it-alls, studious and educated, base their opinions on proven information...
PARROT	Chatterboxes, false appearance of an 'owl', narcissistic through words...
LION	Positive attitude, strong and balanced personality, optimal group behaviour, mature...
EAGLE	Destructive attitude, no interest in the meeting, interventions with direct attacks to other members...

Example of focus groups:

Image study for a brand of hot chocolate powder

Objectives:

- Present market conditions
- Image diagnosis at all levels:
 - Brand, packaging, label, promotional offers, product type, formats, price, product profile, communication, distribution
- Detect negative aspects of the brand image

Example of focus groups:

Characteristics of the sample:

Women in charge of household purchases, in two segments: age 35 to 55 and age 56 to 70

Activity: 75% are homemakers and 25% work outside the home

Type of family: 75% with children and 25% with no children

Social status: Medium-high, medium-medium and medium-low

➤ Image diagnosis at all levels:

Brand, packaging, label, promotional offers, product type, formats, price, product profile, communication, distribution

➤ Detect negative aspects of the brand image

3.2.1.- In-depth interviews

- **Interaction between two people: the interviewer and the interviewee**
- **The conversation is not highly structured (there is no questionnaire)**
- **Interviewer: he/she masters psychological techniques, must be well trained and be experienced**
- **Good for discovering motivations, beliefs, attitudes and feelings (hidden motivations)**

Main characteristics:

- **Duration of between 30 minutes and more than one hour**
- **The interviewer follows an outline unknown by the interviewee**
- **The enunciation and order of the questions will depend more on the answers given by the interviewee**
- **It is important the interviewer's persuasive abilities in order to know the meaning of the answers and getting the truth out of the interviewee regarding his/her hidden feelings or opinions**
- **They are usually audio or video recorded**
- **Possibility for registering visual/physical aspects (physical appearance, location, etc)**

Two types:

a) **Problem-focused interview**

- **The subject is divided into a series of aspects/points**
- **Necessary to devise a plan or outline (in team with the researcher's client), but it never should reach the concretion level of a questionnaire**
- **The interview plan must be followed in a neutral manner so as not to influence. However, there must be some freedom to change the question wording in order to hold the tone of a conversation.**

b) Person-focused interview

- **It is usually considered the *real* in-depth interview**
- **Research is based more on the interviewee's life experience (like in a psychological consult)**
- **The interviewer's role is crucial and difficult**
- **He/she will have to be capable to make the interviewee delve into the research object, conducting without leading**
- **The topics of discussion are not revealed to the interviewee. On the contrary, the interviewer makes questions relating the interviewee's life style, social relations, hopes, hobbies and likings.**

Advantages:

- **Compared with focus groups, they help better to discover someone's personality's hidden aspects**
- **They help better to go into each person's opinions, tastes or motivation**
- **There is no pressure from any group to hide/give opinions**
- **Ideal for people who don't have neither flexible hours nor disposition (willingness) to assist to focus groups or to be tested with projective techniques**

Disadvantages:

- **It is an expensive technique, as they require professional guidance from experts (especially the people-focused one)**
- **The lack of a concrete outline (a questionnaire) increases the risk of bias from the interviewer on the interviewee's opinions.**
- **The obtained information is difficult to interpret and analyze; expert psychologists are usually needed for this task.**
- **Duration of the interview, combined with other expenses, ada con los costes, obliga a realizar un número pequeño de entrevistas**

Uses:

- **Good for finding out information on interviewees' preferences, attitudes or tastes.**
- **Apt for discussion on embarrassing or confidential issues.**
- **Issues over which there are strong socially established norms, and for which the interviewee would easily be influenced by other peers.**
- **Detailed understanding on knowledge and complex reactions.**
- **Interviews to firm managers, not very prone to reveal their information openly.**
- **For products consumed with the senses, or those that affect the interviewee's emotions or mood.**

3.2.2.- Focus groups

- **It is the most frequently used technique, especially in end-user markets.**
- **Origin in group-therapy techniques used in Psychology.**
- **Meeting of a group of people, conducted by a moderator, aimed to look for solutions or more information on any subject.**
- **Base of the method: Any answer from a person will be an stimulus for the rest of the group.**
- **Natural interaction must come up.**



Characteristics:

- **6 to 10 people participate. If group is too small it does not encourage discussion, if it is too large, divisions among participants may come up and give way to several discussions in parallel.**
- **Groups must be homogeneous in demographic and/or socio-economic terms.**
- **However there might be a given feature splitting the group in two, if it is determinant (consumers vs non-consumers, etc.)**
- **Participants must be experienced regarding the subject of discussion**
- **Some marketing research institutes have a census of possible participants and hire them by telephone.**
- **People that participated in previous times should be discarded.**

- **Duration of 1 to 3 hours.**
- **Normally the meetings are held in the institute's headquarters or in a room**
- **Along with in-depth interviews, sessions are video/audio recorded.**
- **The moderator has a key role. S/he must establish a communicative relationship with the group and promote interaction and participation.**
- **Also, s/he must be an expert in this technique (psychologist or sociologist)**



The number of sessions that have to be done will depend on:

- **The research subject**
- **The number of market segments to be analysed**
- **The number of generated ideas within each (subsequent) session**
- **The time and budget**

Once the moderator is able to anticipate the answers or key aspects of the topic, that will be the moment to call to an end. Typically 3 to 4.



Advantages:

- It provides a greater number of ideas referring to the hypotheses than by using in-depth interviews. *Snowball* effect.
- The time consumed is shorter than with the case of in-depth interviews. Getting the information from a single interviewee could take as long as an entire focus group.

Disadvantages:

- **Some of the participants could feel intimidated by the rest of the people, and end up accepting their ideas instead of stressing on his/hers.**
- **Risk of giving not his/her own opinion but the one that is expected from him/her.**
- **More proneness to exert influence on the participant's opinion → bias from moderator.**
- **Moderating as a task is more difficult than in any other technique (except for the people-centered interviews). Difficulty in holding the outline/plan. Quality of result vary a lot depending on the moderator.**

Applications:

- **Understanding consumers' perceptions, preferences and behavior, related to a product or service**
- **Good for getting feelings towards a concept, prototype of tangible product.**
- **Good for generation of ideas for product modification or improvement.**
- **Good for evaluation of advertising creativity**
- **Price testing**
- **Advertising evaluation: TV, press, radio, internet exposure, feelings towards the message of an ad, etc.**



Focus groups also have applications for methodological purposes:

- **Helping to define more precisely a research object.**
- **Getting valuable information in order to structure a questionnaire.**
- **Generate hypotheses to be compared empirically by means of a quantitative research.**

3.2.3.- Projective techniques

- **The subject does not know the aims of the research**
- **Ambiguous stimulus as regards the research object are shown to the interviewee**
- **By means of his/her reactions/response, the subject *projects* hidden aspects of his/her own personality**
- **Interesting from their capability to delve into non-manifest aspects of his/her behavior or feelings**

They are an unstructured and indirect form of questioning that encourages participants to project their underlying motivations, beliefs, attitudes or feelings regarding the issues of concern.

- **They are complementary to the above mentioned focus groups and in-depth interviews**
- **Use very restricted to some specific ends within MR**
- **Usable only depending on the need to get into some specific ideas → risk of being counter-productive because of their subjectivity and difficulty of interpretation.**
- **Interesting to use when necessary to understand hidden motivations, feelings or attitudes.**

Projective techniques

a).- Association techniques:

- Word association test
- Picture association test

b).- Completion techniques:

- Sentence completion test
- Story completion test

c).- Construction techniques:

- Picture interpretation test
- Cartoon test
- Identification test
- Imaginary planet test
- User profile test

d).- Expression techniques:

- Role-playing
- Third-person test

Examples of projective techniques

a).- Word association test:

A beverage manufacturing company launches a new tropical fruit soft drink:

“Listen carefully to the following ideas and answer with the first word that comes to your mind: Equality, Ecology, Freedom, Security, Health, Culture, Wellbeing, Adventure, Civilisation, Risk, Nature...”

Examples of projective techniques

a).- Picture association test:

An image study for newspapers in the Basque Country:

“Identify, according to your criteria, the typical reader of each of the following newspapers:”

→ SHOW CARDS DEPICTING ARCHETYPES:
Businessman, Labourer, Bohemian, Intellectual...

→ SHOW CARDS DEPICTING NEWSPAPERS: *El Correo, ABC, El País, Deia, El Mundo, Gara, La Razón...*

Examples of projective techniques

a) Word association test:

Stimulus	Person A	Person B
Movie day	<i>Get a video out</i>	<i>Go to the movies</i>
Premiere	<i>Too many people</i>	<i>Good movie</i>
Special effects	<i>Over the top</i>	<i>Typical Hollywood movie</i>
Action	<i>Film noir</i>	<i>Entertainment</i>
Cinema attendant	<i>Controller</i>	<i>Censurer</i>
Box office	<i>Queues</i>	<i>Jump the queue</i>
Ticket	<i>Expensive</i>	<i>Pass</i>
Popcorn	<i>Dry mouth</i>	<i>Salty</i>

Examples of projective techniques

b) Sentence completion test:

A comprehensive insurance policy is...

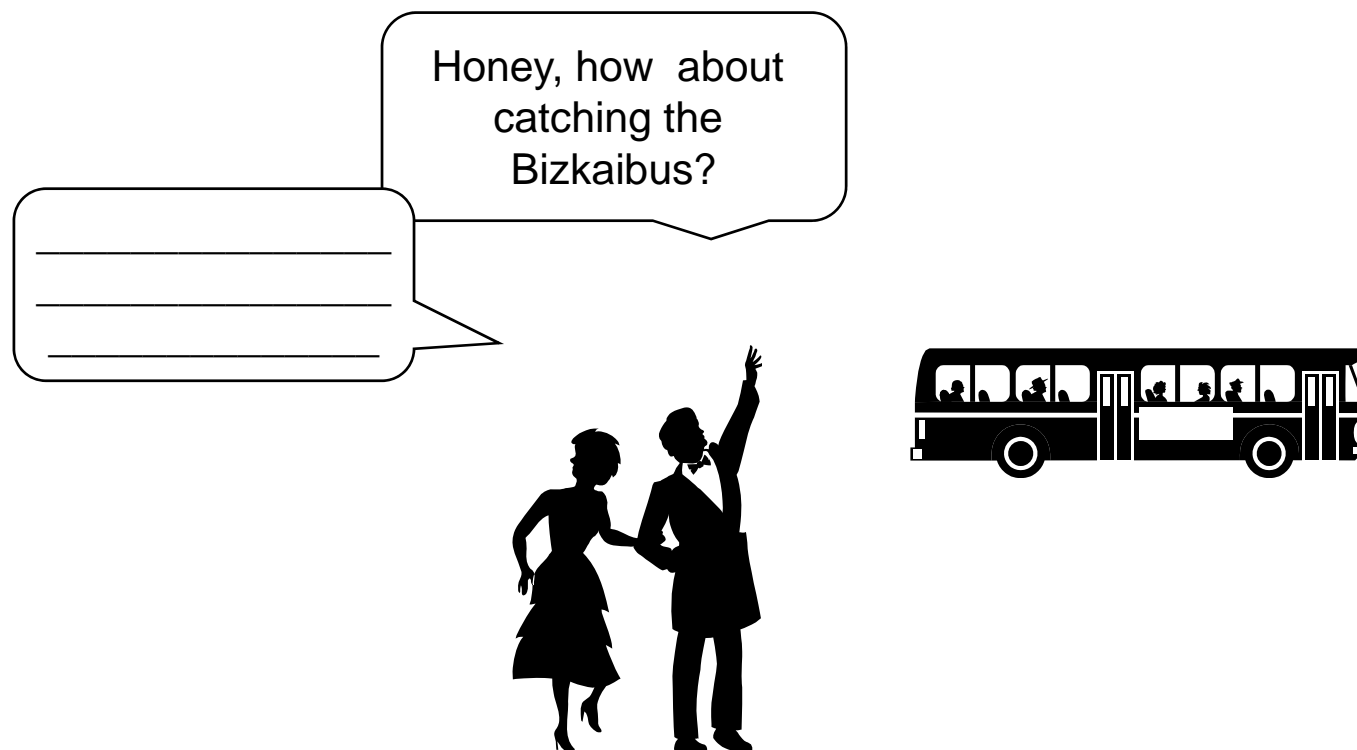
People who shop at the hypermarket...

With a cigarette in your mouth, you feel...

When you travel overseas...

Examples of projective techniques

c) Cartoon test:



Observational techniques:

Advantages:

Objectivity: High-quality information.

Rapidity and economy of resources

Simplicity

Advantages derived from non-intervention: easier to repeat the study, work with subjects who do not wish to/cannot collaborate, able to collect information covertly, etc.

Disadvantages:

Only collects visible qualitative information

Subjects cannot be controlled

Can be an expensive technique.

Observation procedures:

HUMAN:

A team of observers, using physical methods (visual and auditory).

MECHANICAL OR ELECTRONIC:

Photographic or video cameras, photoelectric sensors, etc.

Limitations of observation:

Why isn't it a qualitative technique in the strict sense?

Because it is impossible to record through observation the cognoscitive phenomena of a subject: ***ATTITUDES, MOTIVATIONS or PREFERENCES***

However, some **behaviours** can be observed:

- Verbal behaviour: sales conversations
- Expressive behaviour: tone of voice, facial expressions...
- Traffic patterns
- Time patterns: Time spent shopping, waiting...
- Observation of physical objects: Waste (weight, amount...)
- Verbal and pictorial records: No. of commercial spots a subject watches, program viewing time slot...

Stages of an observational study:

1. *Define the observation topic or problem*
2. *Identify the unit of observation.*
3. *Select recording techniques*
4. *Define parameters or variables*
5. *Select and train observers*
6. *Identify the place and time for the observation*
7. *Collect data*
8. *Recording of events, analysis of results, report*

Applications:

Conduct of consumers:

- Itineraries, routes, preferred sections...
- Reaction to marketing strategies, such as promotions.
- Purchasing habits
- Customer profiles
- Methods of payment used

Traffic studies:

- Use of public transport
- Use of information services
- Pedestrian traffic by areas, streets, footpaths, passages, etc.

Applications:

Response to marketing strategies:

- Pricing
- Communication, Advertising and promotions, point of sale advertising, etc
- Product/Packaging: New products, packaging, new formats, etc.
- Merchandising: Range, space, location, display unit arrangement criteria, identification, etc.
- Location of establishments.

Customer service:

- **Pseudo purchase:** Quality audits of the service provided by branches, dealers, franchises or distributors.

Observation through pseudo purchase or simulated purchase:

Concept: Observational technique allowing for the evaluation and improvement of the level of service offered by companies to their customers, against the objectives or commitments set or the levels of service offered by competitors.

Comparison of qualitative techniques

Criteria	Group dynamics	In-depth interview	Projective techniques
Degree of structuring	<i>Relat. high</i>	<i>Relat. medium</i>	<i>Relat. low</i>
Persuasive effort on interviewee /a	<i>Low</i>	<i>High</i>	<i>Medium</i>
Distortions caused by moderator	<i>Rel. medium</i>	<i>Relat. high</i>	<i>Medium-high</i>
Distortions in interpretation	<i>Relat. low</i>	<i>Relat. medium</i>	<i>Relat. high</i>
Capacity to uncover information in the subconscious mind	<i>Low</i>	<i>Medium-high</i>	<i>High</i>
Capacity to uncover new information	<i>High</i>	<i>Medium</i>	<i>Low (because they only corroborate)</i>
Capacity to obtain information about internal emotional aspects	<i>Low</i>	<i>Medium</i>	<i>High</i>
Involves unusual behaviour of interviewee	<i>No</i>	<i>Yes, albeit with limitations</i>	<i>Yes</i>
General usefulness	<i>Very useful</i>	<i>Useful</i>	<i>Relatively useful</i>

Limitations and advantages of qualitative techniques:

- 1º.- In general, **can only be performed with a small number of subjects**, which do not constitute a representative sample.
- 2º.- Collect **subjective, difficult-to-interpret data**, and **require great mastery** by experts in these techniques.
- 3º.- Require **time and a high level of willingness to collaborate** by the volunteer subjects.

Nevertheless, their great usefulness lies in that **they allow to discover hypotheses**, whose verification can be left to quantitative techniques.

They also **help to direct subsequent research**.