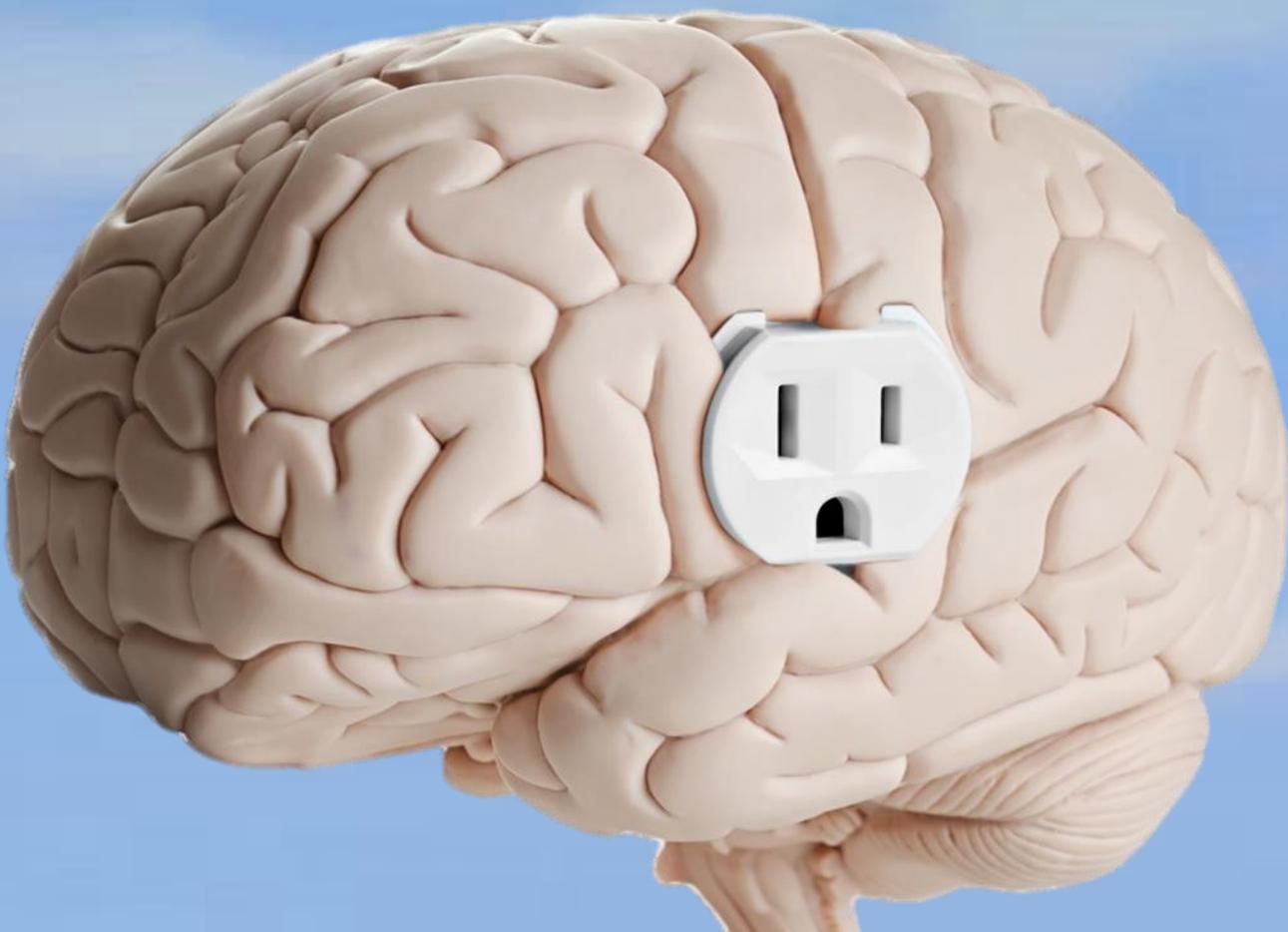


THE SOURCE

The qualitative technique sourcebook

JOANNA CHRZANOWSKA FMRS

How to choose, use and explain
projective and enabling techniques
in the age of the nonconscious





THE SOURCE

The qualitative technique sourcebook.

How to choose, use and explain projective and enabling techniques in the age of the nonconscious. Revised 2016.

Joanna Chrzanowska FMRS

Reinstating the role of 'projectives' in the new world of the nonconscious

'Projectives' or projective, enabling, sorting, and visualising techniques deserve to be used and valued by qualitative researchers and their clients. There are many more techniques than are commonly in use, they need proper interpretation; and sceptical clients can be won over when they realise they are far more than just games. Projectives, however, are messy to deal with, hard to categorise and too numerous to remember.

So here is a book for inspiration, help in choosing, guidance on using, and a little bit of theory to help explain their value. I've added a few that are methods rather than techniques, but these are valuable and can be used for a pilot study or for additional insight.

For a quick start, go to [Choosing the right techniques](#), and then click or **ctrl+click** through directly to the ones that interest you. There are links embedded in the text and the footnotes.

Or you can scan the [Contents](#) page.

There is a [short orientation on projectives and the nonconscious](#) that will help you with terminology, and there is a longer [discussion of relevant theory](#) in the last section.

Finally there is a [reading list](#) if you want to follow up on any specific aspects.

Joanna Chrzanowska, FMRS,
July 2016

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Introduction: why do we need these techniques?

Without the use of these techniques, research can be superficial, inaccurate and misleading.

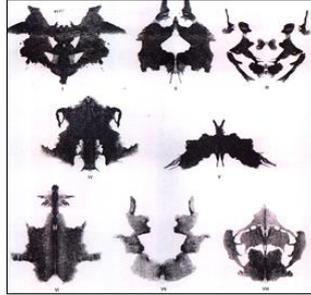
Qualitative research has limitations that projective techniques help us to overcome. Interviewing is based on people telling us stuff, yet there are a lot of things they don't want to say, don't know how to say, or don't know they know. Some things lie outside of their conscious awareness:

- Memories are not encoded and stored like computer files; they are partial, fluid and can change during the process of recall.
- There are limits to self-awareness: habitual behaviour, cultural norms, heuristic decision-making, and personal traits and motivations.
- A lot of information stored in the brain is visual or kinaesthetic and needs to be surfaced before it can be put into words.
- There just aren't enough words for some of the more complex situations and feelings we encounter.
- There are things we intuitively know how to do, but don't know how we know them.
- The verbal processes of interviewing limit the potential for imagination, creativity and synthesis.
- People need to present themselves as rational, logical and successful, to protect their self-esteem. Without realising, they may give biased accounts in self-reports.
- Behaviour is affected by the context, outside of the interview situation.

Researchers use the word 'projectives' as a catch-all for a large range of techniques that help the process of interviewing in many ways. They make it:

- Richer and more expressive
- Easier and more engaging to describe things that people are willing to talk about: how does it feel when you have to see a doctor? What kind of relationship do you have with your favourite brand of shampoo?
- Safer to talk about things that people are reluctant to talk about: bad parenting, cheating in the workplace, anti-social habits
- Possible to discuss things that are of interest to marketers and communicators, but don't exist as concepts or ways of thinking for ordinary people, e.g. brand images, organisational values
- More explanatory, as you can link to relevant theory and take the findings further.

What is Projection?



Projective techniques involve the use of vague, ambiguous, unstructured stimulus objects or situations in which the subject 'projects' his or her personality, attitude, opinions and self-concept to give the situation some structure. In psychoanalytic literature the concept of projection is viewed

as a defence mechanism that externalises unpleasant feelings or unconscious ideas. The Rorschach inkblot test is a well-known example of a pure projective. It has been administered to thousands of people, is scored using set criteria, and is claimed to be both reliable and valid. In qualitative market research, the term 'projective' has come to be used for a wide range of techniques that help participants express feelings and attitudes they may not be aware of. They can also use processes other than projection.

Different versions of the unconscious/nonconscious

Qualitative market research (QMR) has evolved along with the thinking about unconscious influences on behaviour. Early QMR referenced psychotherapy, but it took on board humanistic psychology, neuroscience, behavioural economics and the adaptive unconscious. Some theories now seem outdated, but can all be useful at times.

Freud's unconscious

Popularised, not invented, by Freud, it's an ongoing battle between the primitive desires of the Id, and the restrictions of society as integrated into the Superego. It's moderated by the conscious Ego that nevertheless needs the protection of defence mechanisms. Transactional Analysis offers a more accessible version through the concepts of Parent, Adult and Child states.

Collective unconscious

Jung's more spiritual take on the unconscious retains a dark side (the Shadow) but uses archetypes and symbols from the common experiences of the human journey to help integration of the self. The

Myers–Briggs personality test is based on Jungian theory and can be applied to brands too.

Up to 90% of brain activity takes place out of conscious awareness.

Neuroscientific/cognitive unconscious

Habits, language, images and metaphors, social and learned behaviour mainly run automatically. We become consciously aware of a decision about half a second after the relevant neurones fire, implying that something other than the conscious mind made the decision.

Behavioural economics (BE) and systems of thinking

BE is cognitive psychology made widely applicable through blending with economics. It shows we are full of cognitive biases that undermine economic predictions, and we have two systems of thinking. System 1 is fast, adaptable, intuitive and automatic, and System 2 is what we think of as conscious and rational, calculating and evaluating alternatives. Consumers use System 1 most of the time; marketers use System 2 to think about consumers.

The adaptive unconscious

Still based in cognitive psychology, the theory is that unconscious mental processes help us adapt to circumstances, solve problems and set long-term goals. Although inaccessible to consciousness they can be observed in others. Meanwhile, the conscious mind tells itself the stories it wants to hear.

Unconscious behaviour guidance systems or subselves

Helpful and goal-directed, these are patterns of behaviour that evolved in our ancestral environment, and are embedded in cognitive and endocrine systems. You can think of them as a Council of Elders, or subselves. They include self-protection, disease avoidance, status seeking, mate acquisition and retention, and kin care. Knowing which one is triggered in a given situation, enables you to look for a set of likely emotions, biases and behaviours.

The nonconscious

This is the term now given to all of the processes that work outside of conscious awareness. It lacks the baggage of the original unconscious and is easier to say than 'behaviour guidance systems'. It also lends itself to psychophysical measurement with biometrics, neuromarketing, facial coding, etc. At the 2014 IiEx, which brought together top clients such as

Unilever, General Mills and Google with research suppliers, the clients' most requested meetings were with suppliers in the nonconscious measurement category. Presentation decks from the Nonconscious Measurement Impact Forum 2105 can be seen [here](#).

Identifying the right version of the nonconscious

Freudian thinking, or the updated version of it in Transactional Analysis, is often just what is required to solve an inner conflict between temptation and conscience. There are tools for surfacing and clarifying it, from simple bubble drawings to role play. Jung's ideas can be helpful in understanding brands through the Myers-Briggs.

Habits, technically nonconscious, can be analysed to understand how they are made and changed. There are simple techniques for observing and researching habitual behaviour, made all the more powerful by the smartphone.

We can see social influence at work in focus groups – as long as the moderator is not busy trying to make people *not* influence each other – but we also see it when looking at user imagery, in process analysis and customer journeys. Most consumers can't talk about the cultural influences that frame their thinking because these are too pervasive, but techniques from anthropology and semiotics put cultural analysis in the grasp of qualitative researchers, even if they sometimes need to hire an expert to do it.

System 1 thinking is fast and automatic, but it's not random. There are sets of associations, recurring choices of heuristics, impressions and prejudices, and it can be tapped into through word association, collaging, enactment and the Implicit Association Test, amongst others. There are many ways of eliciting how people connect and classify products, brands and how they link product benefits to higher level emotional and social needs.

Behavioural economics has brought to the fore the influence of context in priming and nudging behaviour. 'In the moment' research technology has made it easier than ever to see directly into the decision-making and consumption environments. Some practitioners are starting to call themselves Behavioural Scientists; integrating insights from psychology, neuroscience and microeconomic theory to offer testable

Qualitative research has a rich set of tools and theories for working with the nonconscious.

explanations of behaviour. The ex-Government Behavioural Insights team (now independent) has led the way in many areas of policy.

The tools of neuroscience look shiny and new. They reassure clients with 'the science bit', but in reality it is the thinking that counts.

Qualitative research has a rich set of tools and theories for working with the nonconscious. It has always claimed to specialise in depth, going beyond the superficial, revealing true motivations. Historically, a lack of understanding of projective techniques has undermined their value, so it's important to show clients they have a serious heritage and they relate to current thinking.

Choosing the right techniques

Use this as a starting point, but remember you can develop and adapt techniques.

What is the research objective?	Methods, tools and techniques you could use	Justification: why these will work
It requires an accurate read on behaviour in context A: As accurate as possible	Observation by researcher Self-observation: diary, photo diary, wearable camera, Auto-ethnography	They help overcome biases in self-reporting: Social desirability bias Need for self-consistency Distortions and omissions of memory Influences of context
B: More accurate than a quick estimate or if no time or budget for observation	Enhanced recall interviewing NLP State re-creation Timelines, Journeys, process analysis Self-scripts Enactment	All of these help accuracy by reinstating the context and by giving time for the chain of associations to form
Top of mind awareness	Word association – can lead on to mind-mapping	This is pure system 1 thinking – fast and associative.
Competitive sets and market perceptions Relationships between products Category language How do people classify?	Mapping of products and brands (aka product sort) Planetarium – compare to ideal Brand parties and families for relationships Bubble drawings of brands talking to each other can also be used	The process of Mapping forces people to think about how they connect and classify things
Comparing brands or products on user-generated dimensions	Mapping will give you this. Kelly grid is more thorough but needs to be done on an individual basis	The Kelly grid is based on Personal Construct Psychology. The respondent discovers how s/he makes distinctions and then rates the products
Discovering how product features deliver end benefits	Laddering shows the connections between features and benefits by asking what is important to people An individual technique but can be aggregated/used loosely in a group	Also based on Personal Construct Psychology. It's very powerful, illuminating for the respondent, and integrates well with Maslow's Hierarchy of Needs
To surface attitudes, habits, impulses that people won't or can't talk about	Implicit Association Test (IAT) claims to overcome self-deception and lack of self-insight Sentence completion – done quickly Bubble drawings; Self-scripts; Observational	IAT works on the basis of reaction time – taps into System 1 impressions and intuitions as well as deep attitudes Observation can note and analyse the components of habitual behaviour

What is the research objective?	Methods, tools and techniques you could use	Justification: why these will work
<p>Systematically exploring brands:</p> <p>1. Product and service delivery</p>	<p>Observational techniques for utility value, functional benefits, sensory experience and service delivery</p> <p>If it's not so complex, diaries, Auto-ethnography, enactment etc.</p> <p>Then, Timelines and Customer journeys.</p> <p>Also disruption, e.g. product deprivation and saturation</p>	<p>An ethnographic approach helps overcome biases in accuracy of self-reporting</p> <p>Next best is Auto-ethnography (self-reporting in context); after that, methods for reconstruction of the usage</p> <p>For 'I never think about it' consider disrupting their normal behaviour</p>
<p>2. Brand differentiators</p>	<p>Mapping and Kelly grid</p> <p>Magic Shelf</p> <p>Me maps (competitive brands)</p>	<p>Mapping gives an overview of where the brand sits and how it differs</p> <p>Magic Shelf shows its strengths and weaknesses</p> <p>Me maps show how different brands relate to people</p>
<p>3. User attributes</p>	<p>Draw the user/describe the user from what's in the shopping basket</p> <p>User mood boards for lifestyles</p> <p>Storytelling</p>	<p>You are aiming for an idealised/typical user image and exploring that in relation to identity needs</p>
<p>4. Usage occasions (need states, experience)</p>	<p>Mood boards of occasion imagery</p> <p>Intuitive collage</p> <p>Enactment</p> <p>Blob tree</p> <p>Psychodrawing for complex experiences</p> <p>Storytelling (focusing on the context)</p>	<p>These all use an image or behaviour as a trigger to re-experience the usage occasion, and to reflect on aspects of the experience</p> <p>You can also use material gathered from ethnography</p>
<p>5. Emotional benefits/relationship with brand.</p> <p>What role does it fulfil?</p> <p>What is valued?</p>	<p>Laddering</p> <p>Bubble drawings dialogue between consumers and companies</p> <p>Analogies and Metaphors</p> <p>Me maps (aspects of one brand)</p> <p>Psychodrawing for complex emotions</p> <p>Intuitive collage</p> <p>Role play</p> <p>Letter to a brand</p>	<p>Which you use depends what kind of brand it is and the focus:</p> <ul style="list-style-type: none"> • Corporate/endorsing brand • Identity/self-expressive brand • Personality brand • Status brand, etc. <p>(Collage and Laddering elicit many aspects of brands)</p>
<p>6. Brand Personality</p>	<p>Personification and Brand party</p> <p>Job Applications, School reports etc.</p> <p>Myers-Briggs or Aaker</p>	<p>All adopt the metaphor of a brand as a person. With the M-B you answer the questions as the brand</p>

What is the research objective?	Methods, tools and techniques you could use	Justification: why these will work
7. Corporate values/ essence	Guided imagery: Brand Planet, HQ Metaphors Fairy tales/Archetypes Serious Play Graffiti	<p>All of these help consumers go beyond direct experience to access the higher levels of brand identity</p> <p>It also helps to have a method of integrating brand knowledge such as a Brand Essence Wheel</p>
Feature prioritisation/ Choice trade-offs	Me maps Balloon game/Life raft Snakes and Ladders – individual technique	<p>This is gamification for something that can be quite boring for consumers</p> <p>Snakes and Ladders gives a more realistic view of what really happened</p>
Sensitive subjects	Projective questioning Bubble drawings Blob tree	<p>These all use the mechanism of projection. People feel safe talking about the Blob or the other person; in reality they are projecting what they would do</p>
Exploring strategic themes/directions	Intuitive collage Storytelling Mood boards	<p>These are especially open and exploratory techniques that allow implicit needs and interests to surface</p>
Packaging design	Personification Drawing (draw pack from memory) Magic Shelf Role play with brands	<p>In addition, a semiotic approach can help to clarify what the pack elements are tapping into</p>
Exploring decision-making	<p>If it's a long process use a bulletin board to follow it over time</p> Diaries Snakes and Ladders Timelines/Customer journeys Process analysis	<p>Most decisions will involve Systems 1 and 2 so you need methods that will identify the impressions and intuitions of System 1, the favoured heuristics, and the rational processes of System 2 and the points where they break down, because of cognitive overload</p>

Using and analysing the techniques

If you are not used to using them, you need to prepare.

1. Prepare the respondents

To avoid it coming as a surprise, mention in the introduction that you may be doing some 'exercises' as a way of understanding the subject more deeply. Then, when the time comes, explain why you might want to do it, for example:

"We have been talking for 40 minutes now and it's been really useful, and I'm wondering if we couldn't get even more stuff if we approached the subject a bit differently – from a visual angle, let's say."

2. Prepare yourself

Allow enough *time* in your discussion guide. At a practical level, make sure you have all the necessary materials. If it's your first time, rehearse what you are going to say and how you will say it. Be prepared to *demonstrate* if necessary (without prejudicing/directing). You need to feel and act confident and comfortable. If you aren't, your respondents will know, and it will put them off!

Don't attempt a technique you don't believe in, or wouldn't be prepared to do yourself. Be prepared for individuals to refuse – remember the [MRS Code of Conduct](#) says people don't have to answer questions if they don't want to. Ask them to observe and join in the discussion afterwards. For example:

"Of course I understand if you would rather not do this. It would be really useful if you could watch and then join in the discussion afterwards. It's the discussion that's most important."

3. Get the timing and atmosphere right

Word Association and Mapping can work very early on in a group, but many of the other techniques need the group to have bonded, be relaxed and trusting (at the 'performing' stage). One of the main reasons techniques go wrong is that they are introduced too early.

4. Create the right mood

Some techniques need the moderator to be energised and enthusiastic – Word association, for example. Others, like Guided visualisation, need people to be relaxed and internally focused. So put yourself in the right

mood before you start the technique. Raise or lower your energy level, your voice, your rate of movement. They will mirror you and pick up the mood from you. At base, just sound confident and encouraging.

5. Give clear and concise instructions

These are technique-specific. You will find key instructions for the techniques in this document. Aim not to talk while handing out papers, pencils etc.; wait until you have their full attention.

6. *Always* get respondents to tell you the meaning of what they've done

Allow time for respondents to give feedback. Use your skills of non-directive probing to reveal the thoughts, feelings and motivations behind what they've done. Encourage them to share and develop the themes that have emerged. You will add your own layer of interpretation in the analysis stage, when you are thinking about the implications for the research objectives.

Using them online

Many techniques translate well into the online environment. The main things you have to watch out for are:

- The platform you are using has the technical capability, for example marking up a number of images, or an easy-to-use drawing tool.
- You will have to adapt some techniques. Face-to-face techniques done in a group will become individual techniques online. Pictures for collages may have to be sourced differently. With Mapping you miss out on hearing the language used as respondents debate where to put things, but you can ask them to write down their initial thoughts about how they would approach the Mapping.
- Clear instructions are more important than ever, especially when you and the respondents are not online at the same time.
- Probing and sharing meanings may take more effort. Bulletin boards are really individual interviews that happen within a set timeframe. Despite the fashion for calling them communities it does sometimes take effort to get people to comment on each other's postings.

Written exercises such as Word association, Sentence completion, Obituaries, Job applications, Self-scripts and so on are clearly not a problem. See overleaf for comments about spontaneity.

How to analyse projectives

Much of the time, the usefulness of projectives lies in opening up new ways of seeing and talking about issues, so the material generated by them is content-analysed as normal. However there are some general analytical questions you might want to ask when looking at the results:

1. Content: What themes are there? What are your hypotheses about? Why it didn't emerge before? What theories might it link to? What are the barriers or defence mechanisms in place and why? What states of mind and ways of thinking do they suggest?

2. Meaning: What kind of personal significance might it have? What role does it play in people's lives? How does it make life richer, more meaningful? What metaphors are implicit or explicit?

3. The symbolic and cultural aspects: Where else can you see these colours, symbols, themes? What do they relate to in our society in general/the respondent's reference group in particular? Do the stories reflect any myths or archetypes?

Please note that you will not find much evidence on the reliability and validity of projectives when used in QMR. The papers about them usually end with a call for more research. ['More questions than answers? A critical examination of the use of projective techniques in political brand image research'](#) is both a useful summary of the academic positions on projectives and guidance on a rigorous analytic process.

Suggested reading for this section

[A full reading list is available here](#)

Bargh, J.A. and Morsella, E. 2008. Paper [The Unconscious Mind](#)
A short summary of the development of the concept of the unconscious

Duhigg, Charles, (2014) *The Power of Habit: Why We Do What We Do in Life and Business*. A powerful analysis of how habits work and how they can be changed

Kahneman, Daniel, (2013) Thinking Fast and Slow

Multi-award winning book describing the fast intuitive System 1 thinking and its biases, contrasted with the slow, rational System 2.

Kenrick, Douglas and Griskevicius, Vladas (2013) The Rational Animal: How Evolution Made Us Smarter Than We Think. Explains the reason why we have cognitive biases and how useful they are.

Tallis, Frank (2002) Hidden Minds, a History of the Unconscious
A very readable exposition of thinking about the unconscious from philosophy, psychoanalysis and cognitive psychology. It does not cover the latest developments.

Wilson, Timothy, (2004) Strangers to Ourselves: Discovering the Adaptive Unconscious

If we don't know ourselves--our potentials, feelings, or motives--it is most often, Wilson tells us, because we have developed a plausible story about ourselves that is out of touch with our adaptive unconscious.

List of tools and techniques

1. Analogies and Metaphors

What are they?

Technically, an analogy is a logical argument, demonstrating that if two things are alike in some ways, they will be similar in other ways also. An analogy is a 'like' situation – “learning to do projectives is like learning to drive a racing car”.

A metaphor is when one thing substitutes for another. Just leave out the 'is like' part. “Marketing is war – we have targets, we plan campaigns to reach strategic objectives, we fight the competition.”

Some metaphors are embedded into the way people or organisations think; understanding this gives insight into behaviour. Imagine how differently an organisation would behave if its metaphor for action was gardening – growing loyalty, seeding new products, harvesting a crop and pruning dead wood.

How they work

Analogies come naturally to us. Our brain makes analogous comparisons unconsciously all the time as a way of making sense of the world around us. Analogies enable creative thinking; they are based on similarity, so the new thinking can be relevant. The properties of the analogy shed light on the properties of the brand.

When to use them

To go beyond top of mind impressions:

- For more lateral insights
- To start a series of projective exercises
- Not just for finding out about 'things' but also experiences.

Timing & preparation

Analogies are quick and need no preparation; however don't stop at the analogy – find out why they chose it.

How to do it

It is worth finding out if there is a spontaneous analogy that comes to mind before you ask for categories like animals or holiday destinations.

“In order to survive, humans rely upon comparing what's happening to them now with what happened to them in the past.”
Hofstadter & Sander

“When you think about X, does it remind you of anything else?” Or a simile – “What is it similar to – a book, a film, another time in your life? Who does similar things but in a different market? What other businesses have similar issues?”

The traditional way is either to make it into a pretend game – “I’d like to pretend that the brand/s we have here could become different kinds of animals. What animal do you think this one would be?” Or ask, “If brand X were an animal, what would it be?”

Use analogies relevant to the respondents. (Young men and cars, older women and flowers, etc.) Cars, foods, animals, TV programmes or characters, holiday destinations, types of music – there are many analogies you can make. Sometimes respondents offer you one you can use in the course of conversation.

Analysis

During the research, look for the key similarities between them, and see if there is anything else you can learn. If it is slow like a tortoise, does it also have a tough shell and live a long time? Notice that analogies are also the basis of some creative thinking techniques. For example, if ‘running a business’ is like ‘managing a theatre production’, use bridging techniques to extend your thinking. A theatre production is split into two halves. Do we need to split our sales team into two sections: pre-sales and after-sales?

Pitfalls

- Not understanding the relationship between the product/brand and the analogy
- Creating a list of stereotypes or clichés which don’t offer real meaning.

Using textures and colours

Don’t think of metaphors and analogies as purely verbal – you can use a range of textures to help people express how something should physically feel. Or colour cards – but check what the colours signify.

Metaphors are also important to notice and explore because they can give a deep understanding of thought processes. For example, there are systematic cultural metaphors, e.g. *Time is money*:

*You're wasting my time. How do you spend your time these days?
I've invested a lot of time in her. You need to budget your time. Is that worth your while?
Do you have much time left? He's living on borrowed time.
You don't use your time profitably.*

Suggested reading for this section

Hofstadter, Douglas and Sander, Emmanuel (2013) *Surfaces and Essences: Analogy as the Fuel and Fire of Thinking*,

Lakoff, George and Johnson Mark, (1980) *Metaphors We Live By* University of Chicago Press

Zaltman, Gerald and Zaltman, Lindsay (2008) *Marketing Metaphoria: What Deep Metaphors Reveal about the Minds of Consumers*, Harvard Business Press

2. Archetypes (and Fairy Tales)

What are they?

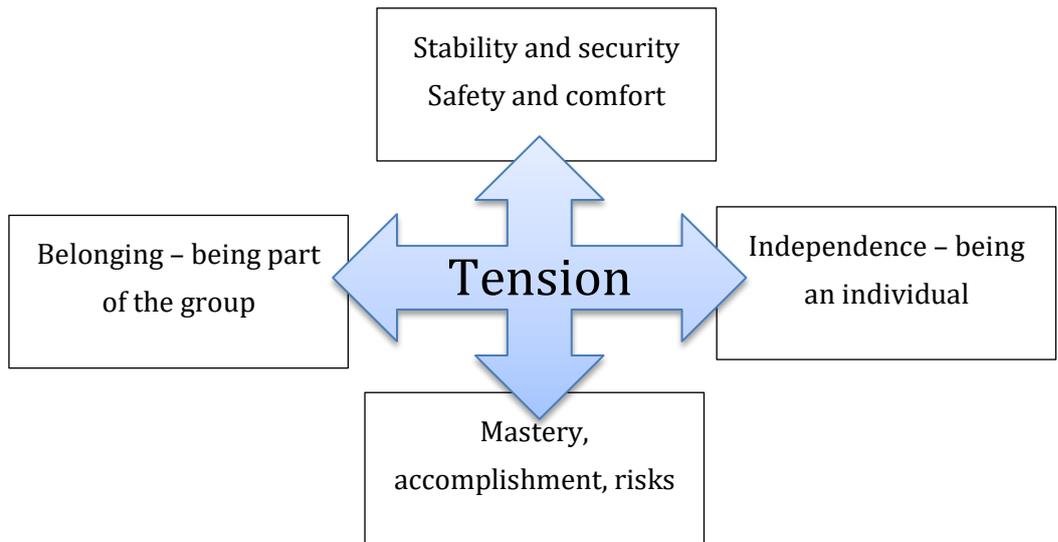
Archetypes are underlying symbolic motifs or images common to human experience. Their surface expression may vary, but the underlying meaning is the same. Archetypes express themselves both culturally and within the individual, from the collective unconscious.

In their expression, they can include animals, religious figures, gods from various cultures, modern day icons and celebrities, pop stars, plots of books and films, rites of passage, feelings of being 'in the grip of something', and transformational events in our lives.

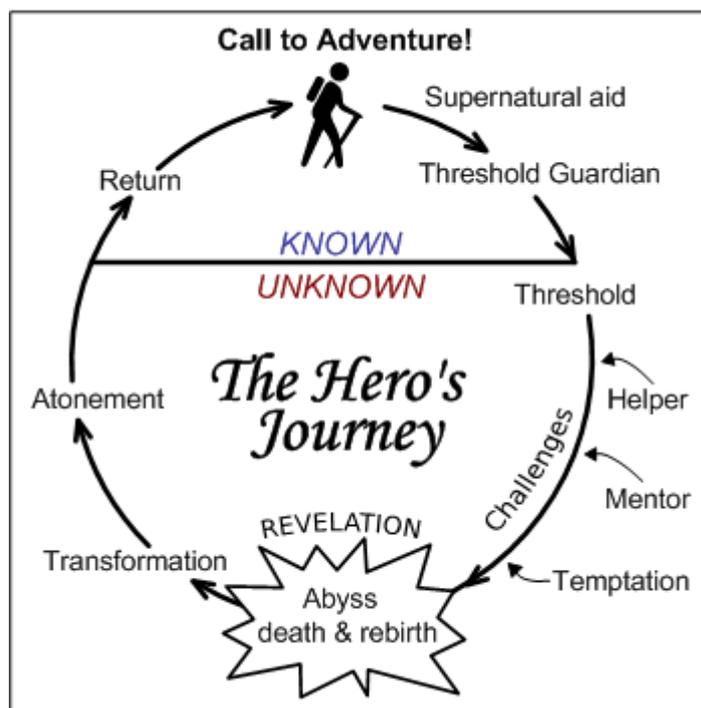
Archetypes are also expressions of motivations. Some are about security and



safety (Guardian, Caregiver) others about taking risks (Warrior, Explorer). The archetype that is expressed depends on the context, so each individual can relate to most of the archetypes at some point. The diagram below, adapted from Mark and Pearson, *The Hero and the Outlaw*, shows the tensions people can experience between contradictory needs. You can see how these can relate to goals in life, decision making, brands and organisations.



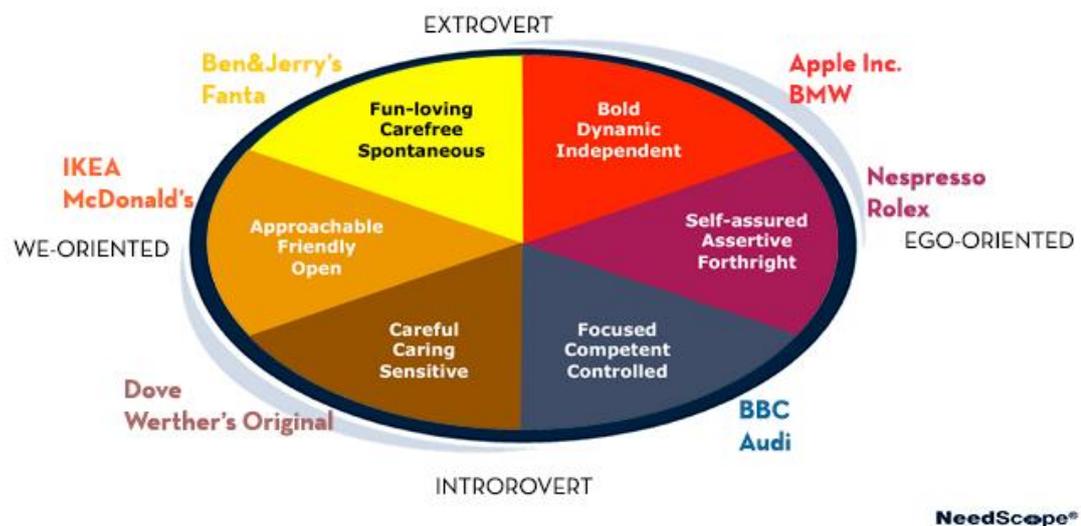
You will most easily recognise archetypes in stories and films, particularly as they often combine into the archetypal Hero's Journey.



Archetypes have been increasingly used to understand and categorise brands. Below is part of the Y&R system for doing so.



NeedScope is another system that can link archetypes with emotions, behaviours and brands.



How they work

Archetypes are a powerful form of communication because they by-pass logical analysis. We can all recognise archetypes instantly and without explanation, we know their roles and how they interact. They mediate between brands and people by providing the intangible experience of meaning. Symbols and archetypes are connections between the individual and the collective and can be cross-cultural too.

Archetypes link to motivation and can help explain some of the intricacies of motivational dynamics. They can be an expression of the core values of a brand:

Archetype	Enables people to	Brand
Creator	Make something new	Old El Paso
Caregiver	Care for others	Pampers
Ruler	Take control	The Economist
Jester	Have fun	Pringles
Regular Guy	Be OK as themselves	Budweiser
Lover	Find and give love	Chanel
Hero	Be brave	Nike
Outlaw	Break the rules	Harley-Davidson
Magician	Bring about transformation	Calgon
Innocent	Retain or renew faith	Disney
Explorer	Maintain independence	Huggies
Sage	Understand their world	Open University

Adapted from Blackwell and Taylor

When to use them

- For brand positioning work, when you want subtlety and depth, core values
- When you need to discover what sort of personality resonates best with the product or service
- When you need to get the balance right between opposing characteristics and motivations – how can it be gentle on the stomach but tough on the pain? How can a source of news be respected yet ridicule what it writes about?

How to do it

A. As a planning exercise

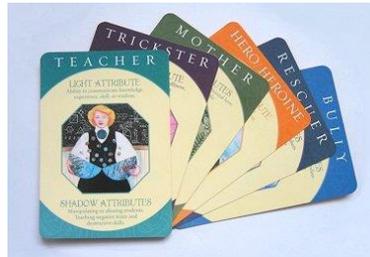
With a group of people who know the brand well – not necessarily consumers – match your brand to descriptions of archetypes. You will often find more than one active archetype – or you may find you need to move the brand closer to its main archetype.

B. In research

Ask the respondents for fairy tales, childhood stories, myths that connect to the situation or issue at hand. You will automatically

generate archetypes as this is what the stories are founded on. Be sure to clarify who is the innocent princess, the wicked witch or the Bluebeard, and by what means transformation might take place. You may also find archetypes appearing in a Storytelling exercise.

C. Use images or cards



There are several sets of user friendly cards, for example, [Caroline Myss](#) has a set of 80 cards designed to help writers develop characters. Make sure there is an interpretive framework with the cards or images that you use. In this case,

you cannot rely on the respondent to explain why they feel connected to one rather than another.

Analysis

Unless you already have knowledge of this area you will have to learn what the archetypes signify so that you are working within an existing system.

Suggested reading for this section

Blackwell, Rupert and Taylor, Judy, There's One in Every Crowd – understanding brands through archetypes, Leapfrog Research and Planning, MRS conference

Mark, Margaret and Pearson, Carol (2001) *The Hero and the Outlaw: Building Extraordinary Brands Through the Power of Archetypes*

Pawle (2000) *A New View of Global Brand Personality for the Millennium. MRS Conference papers,*

Seivert Sharon (1997) *Working From Your Core – Ten Paths to Corporate and Personal Mastery in a World of Change, Capstone 1997.*

[Sparkol Blog: The 12 Brand Archetypes All Successful Businesses are Built On.](#)

3. Balloon Game/Life Raft

How it works

It's a playful and engaging forced choice situation that allows people to access their intuitions and feelings as well as the conscious, rational reasons for choice.

It also works against a cognitive bias called loss aversion – a version of it is called Keeping Doors Open.¹ People don't like closing down options in a decision process even if those options have relatively little value. So if you don't force a choice, people will leave in all sorts of options they would never really use.

When to use it

A. When respondents are not being clear about their reasons for choosing one brand over its close competitors. It helps to identify the weak spots in otherwise strong brands. It also increases the energy in a discussion and is particularly useful as a summary at the end of a group. Don't use it for endorsing parent brands as people will bring in subsidiary brands to the argument instead. *"I wouldn't get rid of Nestle, they have a bad image with the baby milk and all that, but they make some really nice coffee – the one in the green jar. Alta Rica."*

B. You can also use it to look at the trade-offs between features, especially when there are lots of features (e.g. on a mobile phone).

Timing & preparation

It can be more effective if you use symbols of the brands concerned



(logos or pictures) and a small wicker basket to simulate a hot air balloon basket. This engages people more as they physically lift the brands in and out during the discussion. An alternative scenario is where the brands are stranded on a sinking life raft and again some have to be thrown overboard. This technique can last 10–20 minutes depending on the differences between the brands or the number of features.

¹ Predictably Irrational, Dan Ariely

How to do it

A. Brand choice

Give respondents the following scenario: “These three brands are passengers in a hot air balloon which unfortunately has developed a leak, is losing height and is about to crash. If all the brands stay in, it will crash and none will survive, but if we throw two out, the balloon will drift to earth gently and one brand will survive.”

Then divide respondents into three groups, one for each brand, and tell them they have five minutes to make a case why their brand should stay and why the others should be thrown out. Each group presents their case. It is more satisfying to the respondents if there is a final vote on which brand stays in. It is not necessary to complete the game as the presentations give rich material to continue the discussion.

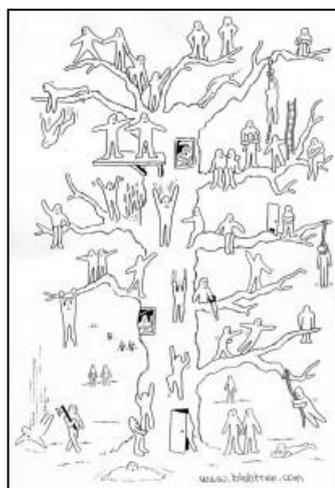
B. Feature trade-offs

Supply a list of features – on paper for individual work, on separate cards if you want the group to work together – and they have to decide which features get thrown overboard. Again, the learning is as much from what happens in the discussion as the end result.

4. The Blob Tree

What is it?

It was developed by a youth worker called [Pip Wilson](#):



“The Blob Tree came out of my work in the East End of London working with young people who could not or would not read. I led a large Team of People Workers as we worked with street gangs including lots of group work. The Blob Tree is about 20 years old now and is used all over the world.”

How it works

The little characters in the drawings are largely unthreatening and have simple to read emotions, so the respondent engages very quickly with them. This is a true projective technique in which the respondents’ feelings are

projected onto the characters. They feel safer discussing them as the feelings now 'belong' to the characters.

When to use it

It has proven to be a very flexible technique, working well with both sophisticated and less articulate respondents, and suitable for enquiring into personal emotions about a situation, job or event. You will notice that a lot of the figures are about achievement and relationships; usefully, some of them express various forms of anger as well. It can be used as a prelude to other techniques that also explore emotions.

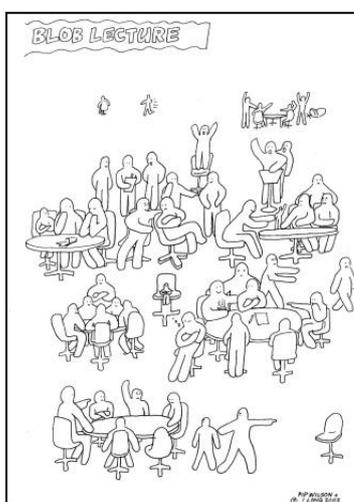
NB. The original Blob Tree has a hanging figure mid right-hand side. If you feel it might upset participants you can remove it, but it is often interpreted metaphorically as 'being left hanging', 'hung out to dry', 'choked by the rules' and so on.

This version is less suitable for feelings about brands or products, but you will find many other types and settings of Blobs on the [website](#).

Timing

It can work very quickly indeed – the main timing issue is the amount of discussion you have about the feelings that are raised by it. Allow minimum 5 minutes or as long as 20 if you have a large group with a wide range of reactions.

How to use it



Give everyone a sheet with the drawing, and ask them to circle relevant figures, for example: 2 figures that represent something positive and 2 that represent something negative. Or you can be more open-ended and say, "Circle as many figures as you want that represent the feelings you have about X."

Make it clear you will be asking people to say which figures they have circled and

why so they are prepared to talk about them. When everyone has finished marking the paper, invite someone to tell which ones they

picked and what they mean to them. NB. Do not assume that the same figures will have the same meanings for each person.

Getting the Blob Tree

It used to be shared freely in the research and counselling communities and for a long time nobody knew where it came from. Now a licence to use it can be obtained at www.blobtree.com. However the licence does not include use on an intranet or the internet, and the designers aggressively pursue anyone who has uploaded it.

Blob Tree online

Bear in mind the remarks above. If the software has mark-up tools they can be used on the Blob Tree. It can be imported onto a whiteboard, although some screens are too small for people to see it all at once. If you number the Blobs it's easier for people to tell you which one they picked and why.

You can use specific blobs to probe feelings, as below.

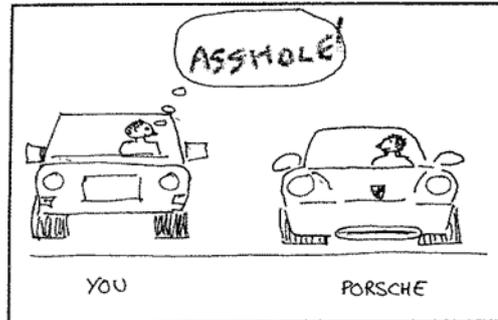


For some audiences, emojis can play a similar role online, which is to start a conversation about feelings.

5. Bubble drawings

How do they work?

Bubble drawings are usually outline drawings of people or products, with speech, thought and sometimes feeling bubbles to be filled in by

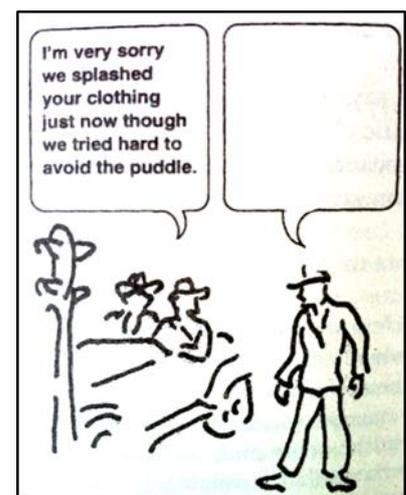


the respondents, who have to project themselves into the situation. They should show the people in a neutral way so that anybody can identify with the figure. Often stick figures work well.

The longer respondents are given to think about it the more rational and socially desirable the response tends to be.

They are a way of accessing what may be unsaid because it is impolite, unacceptable or as yet unknown. They can also help you explore situations from different perspectives. As they are so simple and cartoonish, researchers and clients tend to treat bubble drawings lightly, but they have been used for serious psychological research.

A technique called the Rosenzweig Picture Frustration Test was used to examine the nature of aggression in the 1940s by showing images of frustrating situations and noting what kind of reaction the people spontaneously gave. Using the test as a basis for his study, Rosenzweig discovered that aggression was not just directed to the other person, it could be turned onto the environment or redirected into the self. [An adapted and updated version](#) was used as recently as 2007 for the measurement of hostility in violent forensic psychiatric patients.



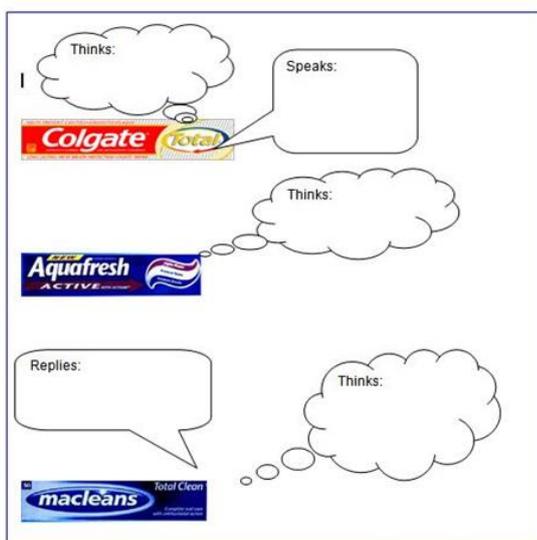
When to use them

They can be used qualitatively or even as part of quantitative projects, where they are treated as open-ended questions. They are useful not

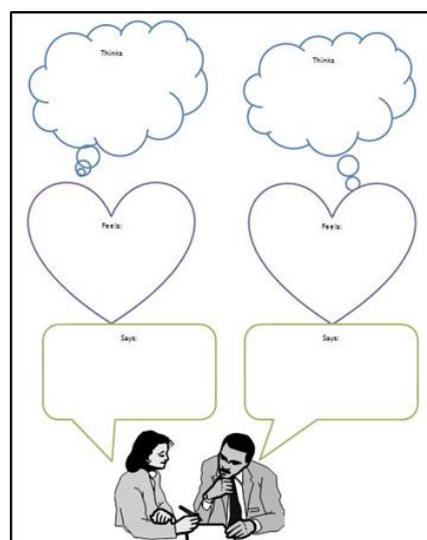
only for getting beyond socially desirable responses but also for exploring relationships and communication. Use them once you have established some trust with the group or the respondent.

Timing & preparation

You need to have them prepared in advance. It sometimes helps to do two or three at a time, as respondents get freer as they become more comfortable with them. It only takes a short while to fill them in, and quicker reactions are more spontaneous and uncensored.



*B
rand discussion bubble*



Thinks, feels, says bubble

How to do it

You can have various combinations of thought and speech bubbles, and that they can go with people, brands and objects. You can have a series, where for example a person says something to an organisation, it replies, and then the person replies and so on.

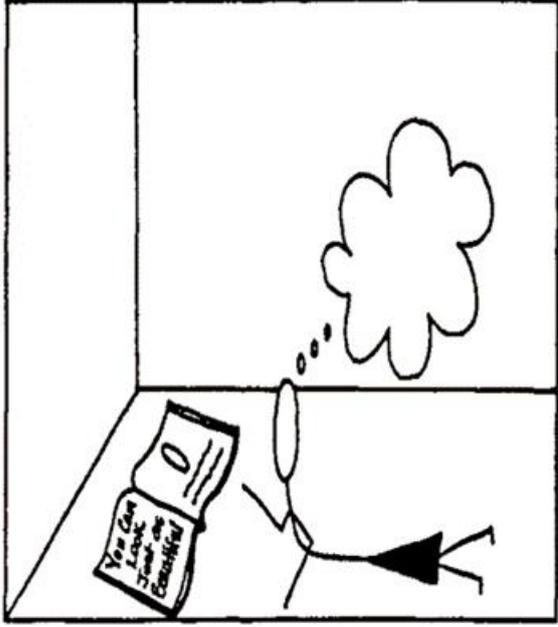
You may have to define the scenario by adding a description. For example, the thinks, feels, says bubble could have a description saying: "A client and a researcher are discussing the use of projectives in an upcoming project." Introduce the bubble drawing by saying it's another way of obtaining information.

"I'd like to try another way of finding out about product/brand X. Most people find this quite fun. Please fill in the bubbles with whatever you think might be said or thought. Put down the first thing that comes into

your mind.” (OPTIONAL: “I’m sorry there isn’t a prize for being clever or funny.”)

You can combine bubble drawings with storytelling, as was done in this body image research with girls:

FIGURE



Susie is reading a magazine at home. She notices how pretty the model in the ad looks. She starts comparing the way she looks to the way the model in the ad looks.

Make up a story about Susie and write it in the space below. In your story tell:

1. what else is happening at the moment
2. why Susie is doing what she is doing
3. what Susie is thinking
4. what will happen next

Tell your story here:

From Martin & Kennedy, *Social comparison and the beauty of advertising models*.

The drawing they used is above, and it also had Storytelling instructions. Here is one of the responses: “She is turning the pages because Susie knows she won’t be able to look like the model. But she is thinking how much she would like to look like the model. Next she will probably try to go on a diet to look like the model in the magazine” (an eighth grader, about 12 years old).

Although it is a general principle that respondents should explain the meaning of their own projectives, you can be putting people on the spot by asking them to say out loud something they have written down privately. You can:

- Ask who is willing to share what they have written down, or whether new points of view have appeared through the exercise.
- Some moderators collect the bubbles and reserve discussion of the content at the time, but mention some of the issues later. (HINT: You can set the group a short task such as discussing something in pairs to give you time to look through.)
- Look at them all together and ask the group general questions about points raised.



Using them online

Bubble drawings can be used online; most bulletin boards allow you to upload an image that respondents can annotate.

Pitfalls

- Too long-winded and over-rational responses (emphasise speed of completion)
- Being silly or unnecessarily rude. Can be a lack of trust in the researcher or process, or a signal of a deeper attitude to the product.

6. Customer journeys/Timelines/Process analysis

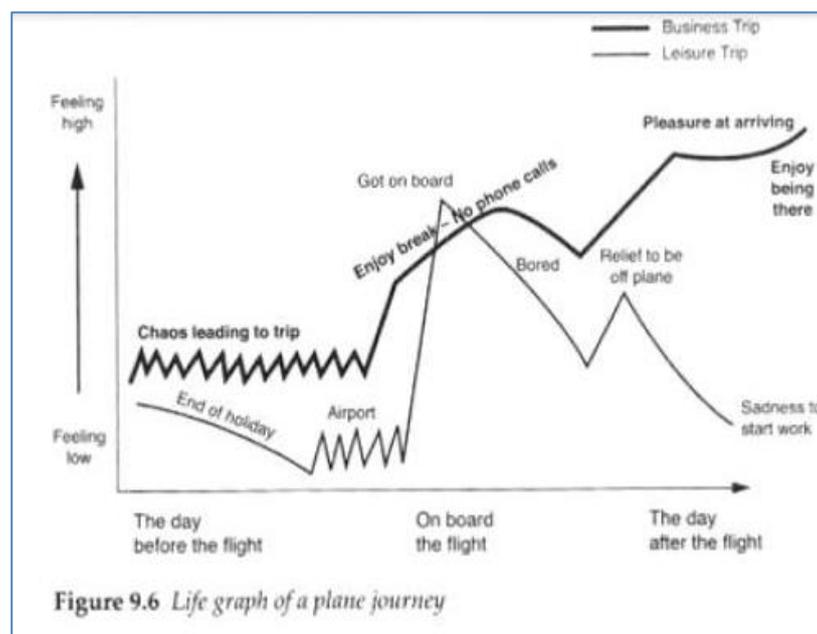
How do they work?

They overcome the limitations of memory. They are structuring techniques that use the associative power of memory to provide a record that is more detailed and accurate than the usual top of mind narration. As they develop they become stimulus material encouraging new thoughts and ideas. Typically, respondents will say, "I had no idea there was all that going on" when they have finished.

Customer journeys and Timelines

These follow the principle of structuring an experience, allowing you to track and describe actions, influences, emotions, decision points, pain points, interactions etc. They can cover years or minutes and can take different forms. They help:

- to simplify and redesign systems and processes
- different departments and organisations to work together better (at 'baton change' moments)
- to point out inconsistencies and confusion at various touchpoints (that customers might not remember)
- Find opportunities to make small improvements that could make a big difference.



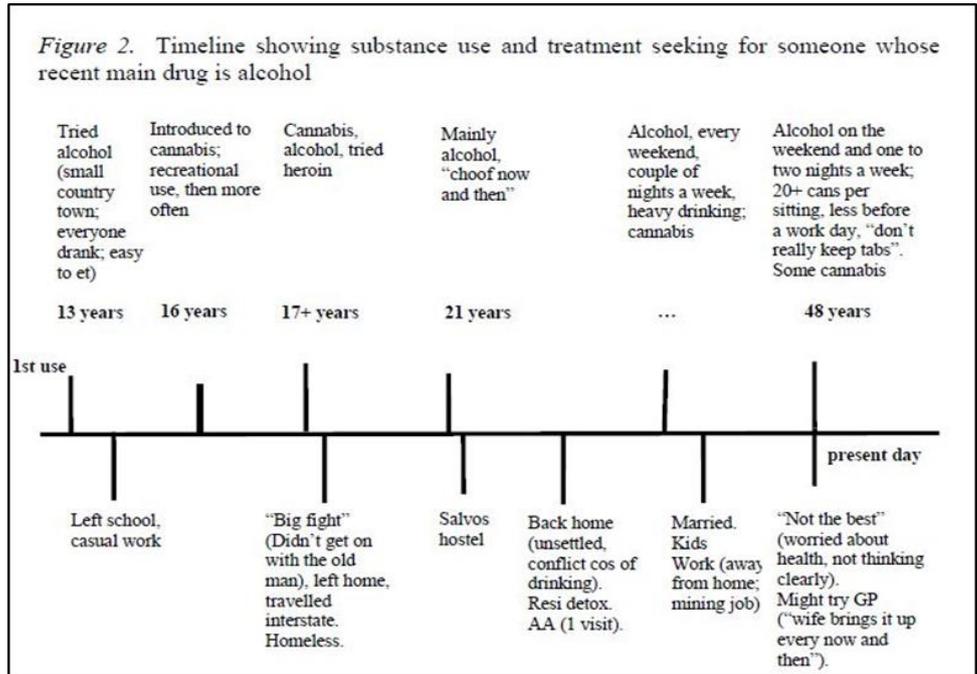
Keegan, Timeline of a plane journey,²

How to do it

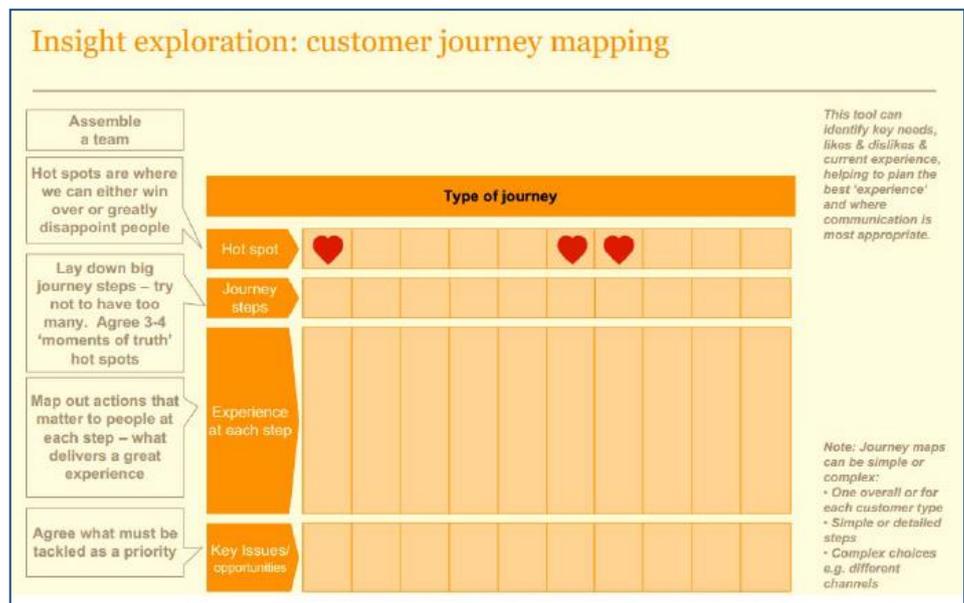
Journeys and timelines can be drawn in a variety of ways. They are usually some form of graph over time that connects different periods or stages with a written or verbal representation of the emotions or influences involved in those stages.

² Timeline of a plane journey – from Qualitative Research: Good decision making through understanding people, cultures and markets (Kogan Page, 2009) By Dr. Sheila Keegan.

Below is a lifespan timeline used in researching substance abuse.



[Berends, Embracing the visual: using timelines with in-depth interviews on substance use and treatment](#)



HM Government has a downloadable guide to [Customer Journey Mapping for Practitioners](#) for researching public services. The concept of analysing the customer journey is widely applicable.

“You must be able to look right across the spectrum when you study a consumer, because today more than half of a consumer journey is done before they contact the supplier.”

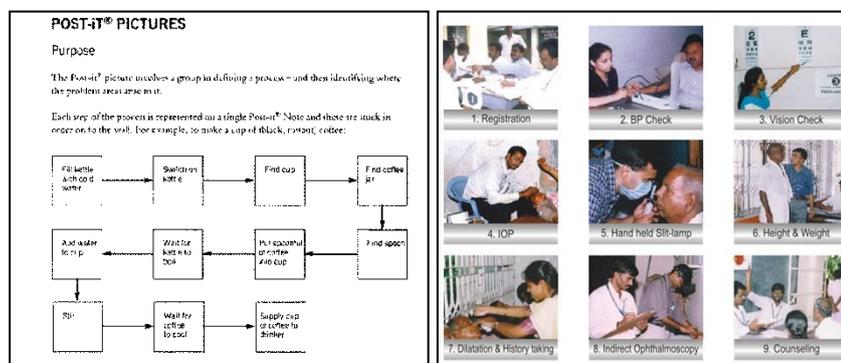
Raconteur.net

Pitfalls

- Starting with a map that is an organisational or department view and which does not allow for enough of a customer’s perspective.
- A customer journey begins before the interactions, and goes beyond the experiences and touch points. There is a longer and slower process of attitude change. You need to start with longer and shorter term motivations and needs, include influences on the customer from external sources, and make space for a perceptual journey as well as an actual one.
- The linear format can be misleading. Retail journeys are often circular, as each purchasing occasion feeds into the next. Sometimes the [Snakes and Ladders model](#) is better at capturing a ‘two steps forward, one step back’ type process.
- Customer journeys are not all the same – you may have to segment or use a decision tree format to show the different options.

Process Analysis

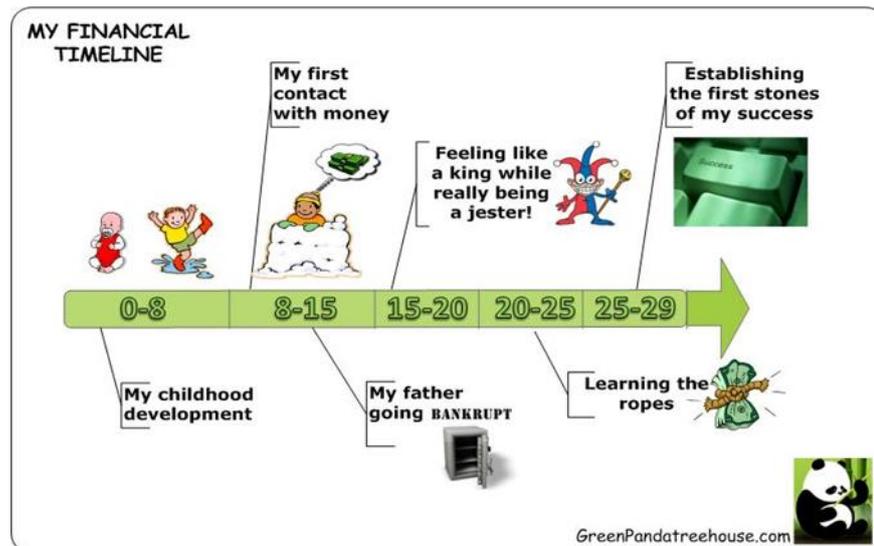
This is another version of a timeline, but focusses more on the process than the memory of it. It helps to define ways in which the process can be made more efficient.



It can also be used in combination with observation when analysing [habits](#), to understand the cues and routines involved in the habit.

Online

Simple timelines can be drawn and annotated on a whiteboard, or you can get respondents to upload images. It’s often better to structure the task as a story, albeit one with dates or timings attached.



7. Disruptive techniques

How they work

They disrupt normal behaviour in such a way that consumers have to think laterally about what they need and do. They are most often used as pre-tasks or in the course of longitudinal research on bulletin boards. The most common ones are:

Behaviour modification

Consumers are asked to use something they don't normally, or to stop using or doing something, and record their reactions, e.g. don't use kitchen foil for a week, but notice when you want to use it, why and what you end up using instead. NB. Make sure it's a realistic task and not unhygienic or dangerous!

Product saturation

Respondents are given 12 brands of margarine, 15 of shampoo, 8 of baby wipes (whatever it takes for them to feel they have an overwhelming choice) and are encouraged, but not forced, to try them all during the week, recording what they notice about how they make their choices.

They must be aware of the purpose of this otherwise they think it is a simple product test and will give feedback on the products, rather on their feelings about trying them, or the product category. You can always ask a hypothetical question if it's not practical to do the

technique: How would you feel if you could not wash your hair for a month? What if Sellotape didn't exist?

Discussion and analysis

Make sure when they attend the groups that you have the full range of products there and ask them to re-enact what it was like having so much choice, and how they resolved the situation.

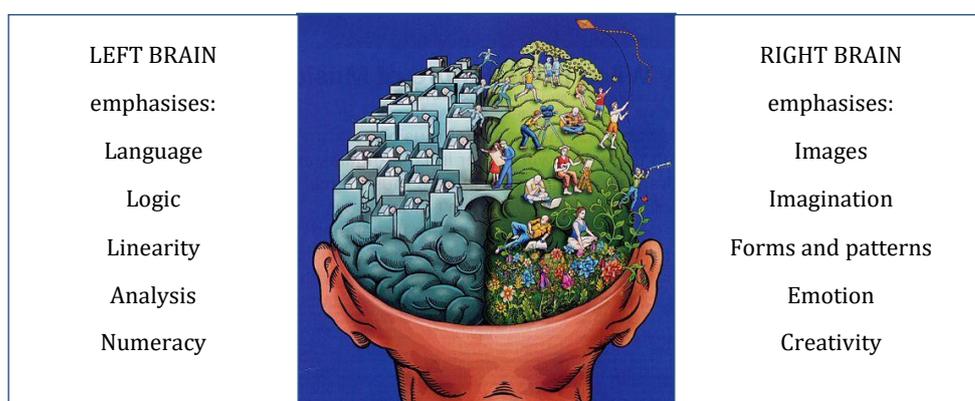
8. Enabling precursor techniques

What are they?

These put respondents into the appropriate mood or State for creative and projective work.

How they work

Since the basis of focus groups is discussion, the predominant mode is left-brain (verbal and logical). These techniques work by setting up the expectation that creativity is both possible and desirable, and by engaging the right brain.



OK, the split brain theory is an exaggeration, and most of the time the two halves work seamlessly together, but switching into right brain mode does change the output, and you get a more holistic view.

When to use them

When you know you will do some serious projective work, and you suspect that your respondents may have doubts about their own ability to be imaginative.

Warm-up: sharing emotional moments

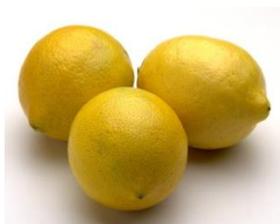
This sends a message to the group right at the beginning that they are going to be asked to disclose personal and emotional experiences. Choose something which should have a lot of emotional content, but is in the distant past, which makes it safe.

After the initial introductions, ask people to tell the group about their first day at school or work, or their first proper date, or the most memorable night out they ever had. You might ask for their favourite toy as a child, or the first holiday they remember. Ask them to take a moment to remember it well, see what they saw, hear what they heard,

and feel what they felt. They then discuss it in pairs before they tell the rest of the group.

The Power of imagination

In this exercise you demonstrate that imagination can actually have a physical effect. Get the group to relax, and then read out the following:



Imagine you are in the kitchen. You take a fresh lemon from the fruit bowl. It is cool in your hand. The yellow dimpled skin feels smooth and waxy. It comes to a small green conical point at either end. The lemon is firm, and quite heavy for its

size, as you look at it in the palm of your hand.

You raise the lemon to your nose. It gives off such a characteristic citrus smell, doesn't it? You take a sharp knife and cut the lemon in half. The two halves fall apart, the white, pulpy outer skin contrasting with the drops of pale yellow lemon juice, that gently ooze out. The lemon smell is now slightly stronger.

Now you bite deeply into the lemon and let the juice swirl around your mouth. That sharp sour lemon flavour is unmistakable.

At this point people will be pulling faces as they taste lemon juice. You can point out to them that imagination is very simple, but also very real. (Let them have a quick drink before you move onto the real projective.)

Music as a creative enabler

Some people are convinced that they are not creative and that they cannot imagine things. If you can convince them they are creative, they will in fact behave more creatively.

Ask them to relax and say there will be a short break from talking. You can say the exercise is designed to exercise the 'imagination muscle'. You are curious whether they might have images in their mind while they listen to music. Choose a short piece of music (4–5 mins) without words, which is suggestive of visual images but not too obvious.

Classical or new age music works well. After playing the music share the imagery in the group for long enough to convince them that they are very imaginative. Then move on to the real exercise you had in mind; you will find they are more relaxed and open.

"No matter who you are or what you want to do, you can be more creative, but that's only true if you first believe that you can be to begin with." [Creative Confidence](#)

9. Enhanced recall interviewing

“Overall, the superior performance with the CI has been very robust.”

What is it?

More commonly known as a Cognitive Interview (CI). There are two types of CI; one is most commonly used for checking understanding of statements used in questionnaires, but this is quite a different procedure. It was originally developed by Fisher and Geiselman to help the police take more accurate witness statements. It's now used by qualitative researchers to increase insights by reinstating the context of behaviours.

“Overall, the superior performance with the CI has been very robust: The effect generalizes across cultures (U.S., England, Germany, and Australia), types of witness (young, elderly; college students and non-students; cognitively impaired or healthy), retention interval (few minutes, several weeks or years) and kind of event to be recalled (crime, accident, daily activities; for recent reviews, see Fisher & Schreiber, 2007; Holliday, Brainerd, Reyna & Humphries, 2009).

The only task in which the CI has not been superior is in person identification (e.g. line-ups), where the CI was equivalent to a control interview.”³

Technically this should be classed as a method, but it is a useful addition to the toolbox because of the emphasis on context. It's also good interviewing practice and an antidote to overfull topic guides.

When to use them

- When ethnography is too expensive or impractical.
- You are happy to rely on memory, but you need the memories to be as detailed and specific as possible.

How does it work?

- Memory retrieval is most efficient when the context of the original event is recreated at the time of recall.
- The more often people search through their memories about an event, the more new details they will recall.
- Recall accuracy is also influenced by the question format: Responses to open-ended requests are more accurate than to closed questions.

³ [The Cognitive Interview method of conducting police interviews: Ronald P. Fisher, R. Edward Geiselman](#)

How to do it?

Before the interview you describe what you need from the respondent: *Just tell me what happened, without waiting for me to ask questions. I won't be asking you many questions, so you'll be doing most of the talking. I'm interested to know what happened to you, so I'm here mainly to listen to you. Please mention everything you can remember, however trivial it seems.*

Adapt it to whatever event, habit or scenario you are researching.

- During the interview you aim to recreate the physiological, cognitive and emotional states of the original situation.
- Avoid overloading them with questions; allow them to close their eyes if they wish.
- The interviewer follows the respondent's flow, asking questions only about what is in the mind of the respondent at the time.
- If the respondent describes a layout or a process, get them to draw it.
- If possible, get them to describe from more than one perspective – what another person might be seeing for example

Useful questions/prompts

- *Take yourself back to... Find a memory of... Tell me in detail how you usually... Paint a picture... Set the scene... Start wherever you want to start...*
- Prompt about the environment/weather/time of year/their age/who they are with.
- Bring in sights, sounds, colours... and then states of mind and feelings.
- As they introduce new characters/events, prompt them to say more about those.
- If they switch to the present tense, change too – *What are you seeing, doing?*

Don't forget

Continually show you are listening and be non-judgmental. If you suspect that the subject matter may upset people, have material to hand (leaflets, helplines) that they can use afterwards if they wish.

10. Graffiti



The text on her forehead said, "I am being paid by a massive corporation to take away your choice about how you look."

How it works

Graffiti neutralises authority. It's a pure and spontaneous form of self-expression; in the form of doodling it's also very System 1, free flowing, uncensored. It is rarely successful used on its own, but as part of a broad spread of techniques it can add a different perspective.

Graffiti gives permission to disrupt the normal rules of behaviour, in order to access negatives or socially unacceptable ideas.

When to use it

It's especially useful when a brand fits into a strong consumer culture, e.g. teenage brands, but also where you might want to encourage expression of negatives or unmet needs.

How to do it

You can have everyone do it simultaneously or just leave people with the paper, to scribble when they want. Put the logo, ad or some brand images on a sheet of A4 and allow people to scribble on them with felt pens. Give them permission to deface the ad by telling them they can be naughty and will not get caught.

Analysis

You don't even need to ask people to read out their graffiti (although they might enjoy doing so), but you do need to ask, "What has this brought out that we haven't talked about before?" If the graffiti were real, what would that mean?

Pitfalls

People fall back on drawing glasses and moustaches. But that's OK. They had fun.

11. Guided visualisation/Brand room/Planet/HQ

What are they?

This one has many names and forms, but they all work on the same principle. Participants are asked to imagine a particular setting or experience. It might be a planet that belongs to a brand or organisation, their headquarters building, or a room that conveys all the sensory experiences that the brand stands for.

The moderator takes care not to give any clues about how the experience should look or feel, so what respondents imagine comes straight from [System 1](#) impressions and intuitions.

Planet or HQ gives more corporate values

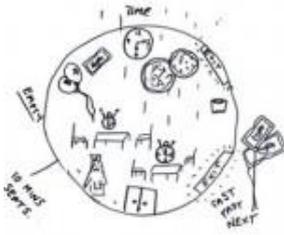
If people know what the real HQ looks like, use the Planet version. The purpose is to uncover the corporate values of the brand by seeing how they are expressed in the exercise. For either exercise, you need to get the group sitting back, relaxed (three deep breaths) and ask them to close their eyes if they want to. You might want to appoint a note taker to capture the descriptions.

How they work

The headquarters version (if they don't know what it actually looks like). Use a low, measured voice and pause frequently so they can form the images.

You can close your eyes if you want to because I am going to ask you to imagine a scene in your mind and then describe it to me. You are walking along somewhere quite safe, feeling curious, and suddenly you notice a building that has the logo of (name brand). Stop and notice what the building looks like, what style it is. (Pause). You decide to go in. Notice what kind of door it has. (Pause) Go through the door into the reception, and notice what you see and hear around you. (Pause)

You can take them through looking around reception, what magazines are there, who else is there, what the receptionist/s look like, how they treat you etc., pausing after each element. Don't overload people though; stop and ask for descriptions of how they experienced the process. What kind of building did they see? What were the doors like? How did they feel going in? What was the décor? How was the welcome?



The **Planet version or Brand room** (feel free to use your own script, this is just an example)

Come with me on a journey, it will be very interesting and completely safe. We are going to visit the planet (name brand), and we are standing on Earth, waiting for the (brand) spaceship to arrive. Here it is, notice how it looks as it touches down. (Pause) We are being invited in; notice how it feels to go in, what it looks like inside, how you are greeted, how the people are dressed. (Pause)

It's hyper-drive so we arrive there in an instant, and as the door of the craft opens, notice your first reactions. (Pause) You can breathe the atmosphere, so you can go out and take a good look around. What do you see? What are the colours? What, if anything, is happening? How does it feel to be there? If you were able to stay, what might you do? (Pause)

You find yourself back by the door to the spaceship. Take one last look around, then go into the spaceship and sit down, you will open your eyes and find yourself back in the room with the group.

Ask the same questions: What did they see? What was the décor like? What was the welcome like? What did the planet consist of? OR, you can ask them to quickly draw the planet if they want to.

Analysis

Analyse the implications – typically you will get impressions around modern/old-fashioned, active/creative, silent/rigid, fast/slow paced, welcoming/disinterested, technological/human – but always a unique combination for that brand.

Pitfalls

There is not always agreement on what people imagine. To some extent this does not matter; you can usually identify the sources of the imagery – sometimes there is influence from an old advertising campaign or the values differed because experiences with the brand have differed. Note that guided visualisation can be used to take respondents into Brand rooms, scenarios with new products, or just to relive past experiences.

12. Implicit Association Test (IAT)

What is it?

This is not an easy to organise, simple projective or enabling technique. It's included because it's potentially very powerful and is being increasingly used by research agencies to pick up attitudes that would classically come into the nonconscious category – ways of thinking, habits, prejudices that conscious minds find it hard to admit to.

How does it work?

Self-reported methods are vulnerable to biases that undermine their validity (i.e. social desirability, self-deception, and self-ignorance) but since the IAT depends simply on reaction time it is very hard to game.

The IAT detects associations between concepts and images on the basis of speed of reaction. If two concepts are associated it is easier to give the same reaction to examples of both.

In the example from the Race Bias test on the right you have to choose a preference by quickly hitting a key – if you spend too much time thinking about what you should put, the answer is invalid. And there are several combinations of images and words. In the end the test can calculate whether, for example, African American and Bad are associated through similar reaction times.

The best way to make up your mind about the IAT is to experience it for yourself. Choose from a [wide range of tests](#).

There is a [review of the IAT](#) on the Market Research Society website. The review concludes that it “yields consistent results, possesses predictive power, offers unique advantages and poses no insuperable challenges to adoption”. However there are other articles that say it's flawed and some of the effects are due to ‘cognitive inertia’. The arguments will continue, hopefully leading to evidence-based best practice for the use of the test.

“The IAT has incremental predictive validity relative to self-report. [The results are] statistically significant, and very clearly so in the meta-analysis.”
[Professor Greenwald](#)



How can you use it?

The IAT is already used in social psychology, and organisational behaviour:

“The IAT was featured on the Oprah Winfrey Show in 2007 as a tool to uncover implicit racial biases, and IAT findings are currently being used in *Dukes v. Wal-Mart*, the largest class action employment discrimination case that has ever been convened to go forward against Wal-Mart.” (Tepper School of Business)

It is currently mainly used in marketing to assess brand associations and preferences. Some research agencies specialise in it:

[The Implicit Testing Company Ltd](#)

[Sentient Decision Science](#)

13. Intuitive collage

What is it?

Otherwise known as collage or words and pictures. Calling it intuitive helps emphasise the role of intuition in choosing the pictures.

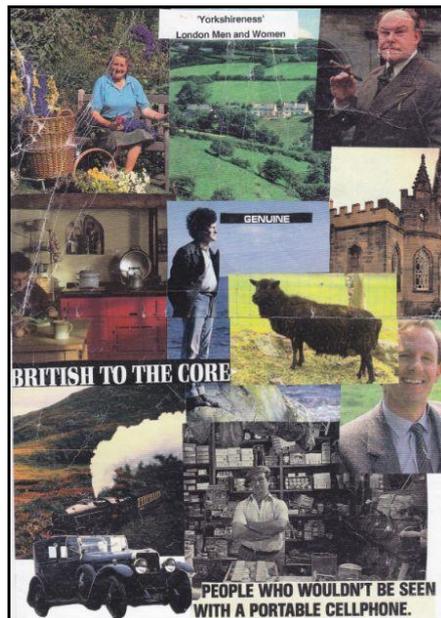
How it works

A picture is worth a thousand words, and this technique harnesses the power and flexibility of visual imagery. Finding pictures which *feel right* for a brand or organisation enables consumers to find elements they would not normally be aware of or be able to articulate. It is important to translate the pictures back into words at the end so that you and they have a shared meaning from the exercise.

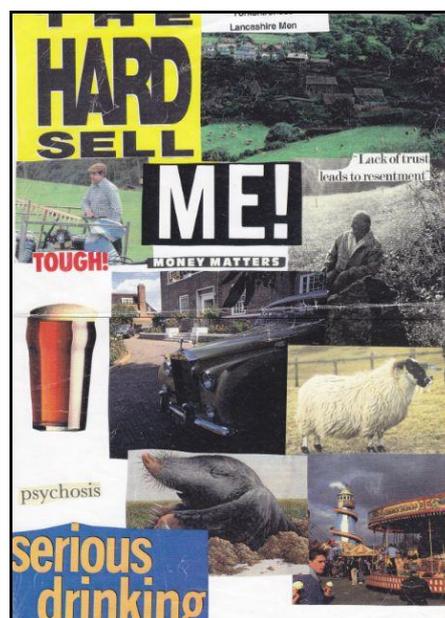
Collage accesses brand associations, memories, emotions, user imagery; echoes of pack design and advertising as well as heritage aspects of the brand – it is very powerful.

It can also be used for understanding emotions and abstract concepts. Instead of getting participants to collage about a brand, ask them to do it about a relevant scenario - when their team wins or their organisational culture.

You can talk about collage in terms of left and right brain or [Systems 1 and 2](#). It is also great at unearthing metaphors. (There is a patented method called the [Zaltman Metaphor Elicitation Technique \(ZMET\)](#), which starts by getting participants to collect a set of pictures that represents their thoughts and feelings about the topic. This method is a systematic analysis of both the superficial and deep structures that frame thinking. It shows what is possible with intelligent analysis.)



The example shown left is a summary collage of the concept of 'Yorkshireness', created for a Yorkshire based brand (Yorkshire Tea). Yorkshire is as up-to-date as anywhere in the UK, but respondents who live outside Yorkshire see it as intensely traditional, resisting modernity and with uncompromising values – very useful for a brand that sells a traditional product.



Interestingly, when the exercise was done in Lancashire, a long standing rival since the Wars of the Roses, the values were still traditional and uncompromising, but a lot more negative! See left.

These are summary collages, based on recurring themes that were picked out in several groups. Notice the value of having words to clarify what the images mean; in this case Yorkshire men were seen not just as tough but selfish,

obsessed with money and blind to the needs of others (that is what the mole represents – it grubs about under the earth, destroying other people's property and it's nearly blind.)

How to do it

Explain that the purpose of the exercise is to surface all the imagery and associations with brands that are less accessible to words, because they are stored in the visual side of the brain. Hand each person a random selection of tear sheets from the box.

*I want you to **look quickly** through these and pick out any that for some reason you associate with (name brand/product/user/etc.). Don't worry if they are not exactly right, you can use pictures creatively. Go by your feeling and intuition, not by logic. When you have finished we will go through them all, and try to work out what they mean together.*

Other instructions you may want to add:

Pick out as many as you want, then find 5 or 6 which you think are best. If you haven't enough good ones in your pile, try the rejects from someone else's. Focus on the ones that are related to how you feel about (name) now, as opposed to in the past.

Allow them enough time to gather together their cluster of pictures, spread them out on the table, and start the interpretation phase. (You may want to have a note taker to capture the meanings that come out.) Ask each person to say a few words about why they chose their images. If they don't know, ask the group to help interpret. Help the group by noticing themes and commonalities or contrasts. Put together the essential images as a collage.

You can split a group into two and have them work on competing brands. This saves time and gives an added dimension, but each half will be subject to its own group dynamic. Typically one person emerges as leader, and you need to explain that the collage should represent both a group view and any strong individual views.

If you decide to present some of the pictures in a composite collage to the client, make sure you include any verbatims from the respondents that are necessary to clarify the meanings of the pictures. You can see below the breadth and depth of issues that can emerge. Notice that some of the imagery contradicts common opinions.

For example, many people say private hospitals spend too much money on the buildings and décor – it is not necessary to look so luxurious.



However there is a deep metaphorical equation between the outward trappings of success in a consumer society and the belief in success that a seriously ill patient needs. In evolutionary terms, success is survival.

Collage as a Customer journey

- Define the stages of the Customer journey
- Put up a separate flip chart for each or use a roll of lining paper
- Ask people to pick images that represent their feelings at various stages, and to attach them to the appropriate stage
- Stand back and discuss – not forgetting to capture the insights

Pitfalls

- Not enough time to do it properly
- Occasional respondents who use their pictures to tell a creative story, but who say nothing about the research questions (annoying but not a real problem)
- People who say they couldn't find anything in their set of pictures (ask them what they would have wanted to be there)

14. Kelly or Repertory grid

How does it work?

This is an *individual* technique which enables you to understand what discriminations people make between products (or services, or indeed other people), and to rate them by the discriminating factors (constructs). It helps organise information respondents are aware of but also surfaces discriminators they did not know they used.

	Site 1	Site 2	Site 3	Site 4	Site 5	Site 6	Site 7	Site 8	Site 9	
Organized	7	7	9	7	3	3	1	4	4	Cluttered
Warm	8	8	6	7	3	3	2	2	2	Sterile
Colorful	7	6	4	5	9	3	1	2	2	Bland
For First Timers	8	8	7	8	9	5	1	2	2	For Experts
Lively	8	9	7	7	9	5	1	4	1	Dull
Small Number of Steps	4	5	6	9	1	1	1	2	1	Complex
Searchable	5	1	9	7	2	3	1	2	1	Not Searchable

A simple grid comparing a range of websites

It is based on the work of George Kelly, founder of [Personal Construct Psychology](#). It has found favour in many fields because it provides a way of understanding perceptions without prejudging the terms of reference. Unlike a conventional rating-scale questionnaire, it is not the investigator but the interviewee who provides the constructs on which a topic or product is rated.

When to use it

It's all about getting at differences between individual items, products or people. It works well with simple brands. The task is to look at three items and to say which two have something in common but are different from a third. So it could be done with brands of biscuits for example, as the distinctions are simple. But it would be harder with image-led brands such as perfumes, or very complex brands such as Heinz or Nescafe, because there are potentially hundreds of differences.

As it's an individual technique, unless you want to get involved in software for grid comparisons, it's more useful at a pilot study stage, maybe for a brand review, and of course for the start of a Laddering exercise. You can work with the elicited differences by using them for content analysis.

This [paper](#) from Portsmouth Business School and Cranfield School of Management shows the value of it in exploring topics that are not well defined, such as supplier-buyer interdependence

How to do it – elicitation by triads (No, not the Chinese kind)

1. First you elicit the constructs. Gather a good selection of products in the category you are interested in. Have them all on view to the respondent. Choose any group of three, and ask: “In what way are two of these the same and different from the third?”

2. Give the respondent plenty of time to answer...

“Two are cheap and one is dear.”

“Two have well-known names and one is a shops-own brand.”

“Two look plasticky but the other one is long lasting.”

...and aim to identify both the positive and negative poles of the construct. As you will see they usually emerge from the technique, but occasionally you may need to clarify and probe. One might be trustworthy but don't assume the other is untrustworthy; it might be suspicious. Continue until you start running out of constructs, or people are just making up differences that are not really important to them.

3. Create a grid, in effect a rating scale, where you rate the elements on the constructs you have generated. There are differing degrees of detail, depending on your purpose. If you want to quickly understand the differences between a couple of products, you don't need to do anything elaborate. Or, you can create a more detailed evaluation instrument with numerical scales and use a range of analyses.

The example overpage uses the rep grid to examine the role of culture in design, and elicits the reactions of a range of Dutch and Japanese industrial designers to six pens. The table is a sample for one of the Dutch participants.

Negative Pole	A	C	E	M	Q	R	Positive Pole
Underneath or below the ideal diameter (1 cm), difficult to handle	4	4	4	2	3	5	Pens are thin for holding, easier to control, more precise
Feels like nothing is in your hand; too light	1	3	3	4	4	4	Relatively heavy; weight resistant
Too light of a plastic pen; no quality	1	3	2	2	4	4	Material has quality; robust, solid
Unattractive patterns, cheap colors; resembling a toy; glittery	1	4	2	3	5	5	Appearance, coloring have professional resemblance; metal, aluminum look
Crappy; lot of force needed; not working properly; weak mechanism	2	4	3	2	4	4	Smooth, proper feedback; clicks properly; quality mechanism
Only one function, one type of writing; too small to hold properly	2	3	3	4	5	5	Multi-functional, with an eraser. All together, 4 separate things; refillable.
Common mechanisms that I see often	3	3	3	4	5	5	Unique switching mechanism
Gel grip, feels too soft, slippery; feels like I'm loosing the grip or like it's too hard	2	5	4	1	3	3	Rigid grip, soft material feeling but not loose
Feels like you are going over a rough surface; need to apply more force.	4	3	5	4	3	4	It has a fine liner; I can also draw with it, can make clear lines that are smooth, soft

[Tomico et al., The repertory grid technique as a method for the study of cultural differences.](#)

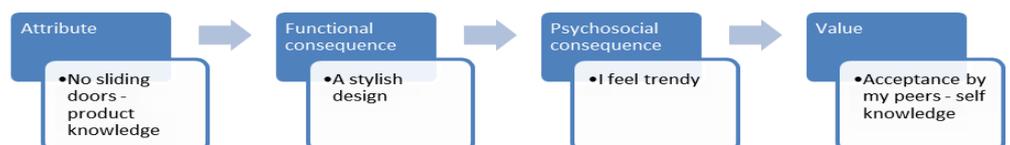
The very simplest way to use the rep grid is to use the triad method in a group, to elicit the differences and combine the views together.

15. Laddering (a.k.a. Means-End Chain)

What is it?

Laddering is also based on [Personal Construct Theory](#), although you can do it without knowing anything of the theory itself. It is a process to show the links between attributes (constructs), consequences and motivations. You start with product attributes, and ask, "Why is that important to you?" Then move up to another level of functional consequences as you keep asking "why?" You end up with the psychosocial consequences and then the core motivations for buying or using the product. It goes from product knowledge to self-knowledge (for the respondent).

Example: Why do you drive an SUV instead of a mini-van?



The journey is more important than the destination. At the very top of every ladder is one of Maslow's needs – to be loved, to be safe, to be able to express oneself. So often the most interesting and unique benefits are further down the ladder.

When to use it

When you want to understand respondent language, relate needs to wants, and map the inner world of the respondent. Laddering:

- gives insight in a structured form
- clarifies relationships between product/service attributes and deep motivations
- can be used to segment consumers in terms of the meanings they give to product attributes
- can be used to contrast positionings
- Can be used in strategy development and to find 'leverage points' in advertising.

It is most often used to examine product categories, positioning and communication research, decision-making maps, and 'blue sky' exploration. For example, it was used to identify which new technology features most closely matched the core values of the [Infiniti brand](#).

It has been famously used to examine the positionings of [political parties and their leaders](#).

As it's an individual technique you may need software to combine the ladders from a number of individuals, but like any qualitative data, a small number of interviews is open to normal qualitative methods for content and thematic analysis. It's also useful prior to a larger research study as preparation, both to highlight issues that may emerge later and to make sure they are explored properly.

Timing & preparation

It takes at least half an hour, if you have your constructs or descriptors ready. A detailed laddering can take up a whole depth interview. There may be considerable investment in coding and analysis if you are using it for segmentation and if you plan to use software for analysis get the software first – it may require special ways to input the data.

How to do a laddering interview



Don't forget the introductions and the warm up. Sit side by side with the respondent and build the ladder together.

You need to start by eliciting a number of descriptors relevant to your product category.

There are various techniques for doing this (mapping, Kelly grid and simple open-ended questioning) or you may already have the descriptors, e.g. a list of features in a car.

You should work with the ones that have most meaning or relevance to the respondent, so ask the respondent to prioritise them, and aim to work with the top ten or so.

Laddering only works with positive descriptors. You need to be clear that the list you have are things respondents would want, because you will be asking, "Why is that important to you?" NB. If you are working with product features it is common to assume the feature is the preferred pole – for example air bags are preferred to no air bags. But if there is any doubt you should check: which do you prefer: hard suspension, soft suspension, adjustable suspension?

Write the descriptors or features across the bottom of a large sheet of paper. Go through them in turn, asking variations on the key question: Why is that important to you? Why does it matter? Why do you prefer that? Why is it important? You can vary the way in which you ask it.

Write in the answer above the feature in pencil, and then ask about that one in turn. Keep going until you join with another ladder, come to a dead end, or come to something really obvious.

EXAMPLE

Why do you prefer to give your dog dry food?

A: "I think it is better for the teeth."

Why do you want to give him something that is better for the teeth?

A: "I think the dog will be healthier."

Why does it matter to you that the dog will be healthier?

A: "Because I would feel guilty if he got bad teeth and there was something I could have done about it."

Why is it important that you shouldn't feel guilty?

A: "Because I would like to think of myself as the sort of person who loves animals, and I certainly love my dog."

Pitfalls

Constant use of the word “why” turns an interview into an interrogation, especially when you have to ladder up from a number of constructs.

Find ways of softening the question or occasionally use alternatives:

“I’d like to understand why...”

“What are the benefits as you see them?”

“What about that is important to you?”

- You will find that respondents will not always answer the question directly; they may answer another point altogether, or give a number of reasons all in the same sentence

“The dog will be healthier and I will save money at the vet.”

- Where there are two reasons you can split the path and ask about both separately:

“Why is it important for your dog to be healthier?”

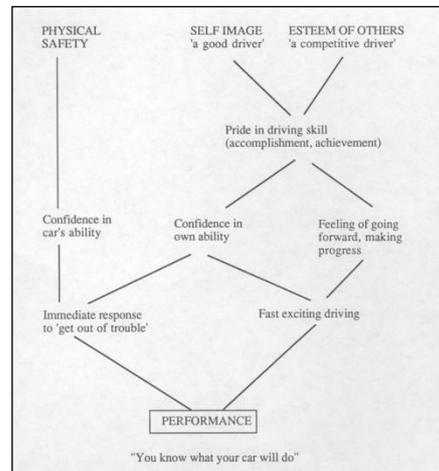
“What are the benefits of your saving money at the vet?”

- Respondents become annoyed because the procedure is repetitive and many of the answers are to them ‘obvious’, or they give you an answer that is on the same level, so you need to be patient and reframe it.
- The procedure can be intrusive and respondents become defensive. There are some cases where it does not respect respondents’ emotional well-being. For example in relation to safety features on cars there can be a whole theme about the consequences of injury and death to themselves and their family.

Such upset can arise with even innocent looking constructs because the nature of the procedure is to move towards the centre of the respondent’s psyche, wherein are not only the core values, but also the deepest fears and insecurities. To protect respondents you should stop the questioning if there are signs they are uncomfortable or upset.

You should also be aware that some respondents will use defence mechanisms to avoid uncomfortable questions. They might say something socially acceptable or move the topic to an area which is not so upsetting for them.

Analysis



An example of a ladder after analysis (several individuals combined). Notice how the one construct of 'performance' leads to different core constructs for different people. Some are inner directed (self-image), some outer directed (esteem of others) and there is a group for whom physical safety is the most important consequence of a car with performance.

If you are doing it with a few individuals, you will find it possible to analyse the ladders by hand-coding and scanning for patterns. You will be able to see rich possibilities as soon as you have completed the first few.

If you want to use it seriously on a major project you will have to invest in something like [Mecanalyst software](#) to deal with huge amounts of qualitative data, do content analysis without damaging original meanings, sum up the patterns across individuals and construct the overall diagrams. However for exploratory research the ladders themselves are a rich source of hypotheses about behaviour which you can check out in further research.

Laddering as a thinking process

The principles of Laddering can be used by a group in a meeting or workshop when looking for strategies or positionings for a product. You start by listing all the descriptors and benefits of the product, and make an assessment of which ones might be most important to the consumer.

Taking these, you ladder up from each one, with the group guessing the most likely responses to the question, "Why is that important?" People who know their market can make some pretty good guesses. As the ladders evolve, they will indicate different positionings and strategic directions for the product, which can be explored in research.

Suggested reading for Kelly grid and Laddering

[Abeele, V. V. and Zaman, B. Laddering the User Experience!](#)

Fransella, F., Bell, R., Bannister, D. 2003. *A Manual for Repertory Grid Technique*, 2nd Edition, Wiley.

[Hawley, M. 2007. Eliciting User Experience Comparisons in the Customer's Voice.](#)

Kelly, G. 1955. *The Psychology of Personal Constructs*. Norton.

Jankowicz, D. 2003. *The Easy Guide to Repertory Grids*. Wiley.

[Reynolds, T. and Gutman, J. 1988. Laddering Theory, Method, Analysis and Interpretation. Journal of Advertising Research, Feb/Mar, pp. 11-31.](#)

Reynolds, T. and Olson, J. 2001. *Understanding Consumer Decision Making: The Means-end Approach to Marketing and Advertising Strategy*. Psychology Press

16. Magic Shelf

What is it?

It's a pure projective technique where the respondents project both their implicit and explicit knowledge about the brand onto the pack. It also reveals something of their own attitudes and usage as the brand speaks about them.

How to do it?

Respondents imagine they are in a store where the brands on the magic shelf know why people do or don't buy them. You can do this as a bubble



drawing or simply by holding up the products and asking people to say what the brands are thinking when they come along.

Is the respondent a prime customer?

Why? If not, who are they waiting for? Who will recognise their value?

Stay with it; at first you will get the official brand line, but then remember the brands also know what they *really* deliver and what people *really* do with them.

How will the brand feel when it's been bought and taken home? Where will it be put? How will it be used? Who will be unhappy with it?

Online

The bubble drawing version works online but you will need to encourage people to do more than the initial obvious judgment.

17. Mapping

What is it?

One of the most commonly used techniques, this works with actual products, logos or even words written on sticky notes for spontaneous Mapping. It maps the consumer's view of a product category by representing their mental classifications as physical groupings. By moving the products, you explore the relationships between them.

When to use it

To familiarise or update yourself with a market, and to provide a competitive context for your product or brand. Also to:

- Establish consumer vocabulary
- Learn how consumers discriminate/categorise
- Understand packaging cues
- Define what aspects of the brand/product contribute to its positioning, and assess what else might be competitive
- Look for market gaps
- Discover where new products or brand extensions may sit in the market
- To warm up and bond a group and learn how people talk about the subject you are researching.

Timing & preparation

The more detailed the mapping stimulus, the more detailed information it can provide, so Mapping works best with the actual products. If you use logos, you will miss some of the detailed discrimination that comes from product features, although you will get a sense of corporate values and why high level brand choices are made.

How to do it



For **undirected mapping**, obtain a broad range of products and brands relevant to the category you are working with. Check quickly that respondents are familiar with most of them. Instruct the respondents to group

them together in whatever ways they think the products go together. You might ask them to choose the 'most obvious' or the 'most important' ways of grouping them. Ask the respondents to pick them up and sort them into the groups. Watch and allow for individual differences.

If the Mapping is being dominated by a few respondents check if the others agree to it. If they don't, do a second or third Mapping to get everyone's views, or just note the differences: "So some of you have put X over there, but a few think it goes between this group and that one..."

Ask for an explanation of why each group was put together. (To save time, you can ask only about the one your product is in, but you learn more by looking at the others too.) You are looking for all the elements that group has in common. Check whether there are any meaningful sub-groups within the larger groups. You can come back to it later with a new product and see how it would affect the categories created.



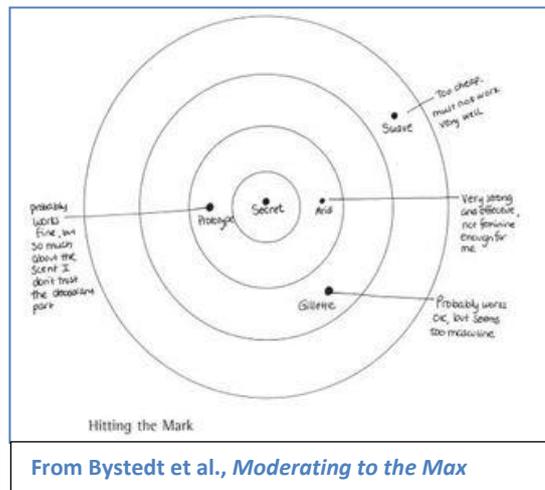
You can also do a **directed mapping**, where you specifically ask the group to order the items by price, effectiveness, or whatever criteria you choose.

You can use one or two dimensions, and as you can see at right, it is easy enough to do **online** if your platform has a whiteboard that allows respondents to drag and drop. Ideally it's done by only one person at a time, so it's better in a bulletin board than in an online group.



18. Me maps/Planetarium

What is it?



It's a simple structuring technique based on a bullseye, a visual metaphor for being central. The distance away from the centre represents psychological or emotional distance. It's more sophisticated than asking people to put products in order of preference as it

does not assume preferences are linear. Two products could be the same distance from the centre but for different reasons.

There are numerous variations, depending on what is in the centre. It might be:

- What feature is most important to me, which brands I feel closest to and why (Me map)
- The ideal product (Planetarium)
- The feature that is most useful
- The characteristic that is most typical or essential to the identity of an organisation

How to do it

Once you have the concentric circles ready (keep a set in your toolkit) all that remains is to establish what is in the centre, what you are rating, and the significance of the rings. It helps to get people to agree on the definitions, e.g.:

- Completely outside the circles – *not me at all*
- Outer ring – *under some circumstances*
- Middle ring – *I feel comfortable*
- Central ring – *YES! That's me!*

Resist the urge to turn it into a five-point scale – you will learn as much from the debate on what to call the rings as you will from the placement of the items. Get people to write their justifications for the placements so that you can have more material to discuss.

Mood boards can re-create States – the mood – in respondents, so you can see whether they connect with it. You use another NLP principle: that the visual, auditory and kinaesthetic aspects of any experience are all connected. So you can start with a picture and end up with a feeling.

How to do it

Allow everybody enough time to look at the mood board and to focus on a picture they are drawn to. Explain that you are trying to understand what that mood is really like for people, and that you would like respondents to try to get into that mood. (It could be a usage occasion or any other kind of experience.)

They can start with the picture, or they can remember a time when they were doing something similar.

Bring to mind a time when you had the experience of warm relaxation...

(Pause)

They can close their eyes if they want to, and see and feel themselves in that situation. Allow them some time to bring the experience to mind.

Prompt with:

If you are seeing a picture, make it as clear and bright as you can. Try to bring it into focus. Where are you? What are you doing? Is anybody else there with you? What can you hear?

If you are listening to any sounds, pay attention to them, and make sure the volume is at a comfortable level.

Notice what you are feeling. What is happening in your body? What is your emotional state?

(If this sounds slightly hypnotic, it is.)

You will be able to tell who has achieved a different State because their face will change to reflect it. Overall this can take under five minutes but it's important to capture what happened. You can start with a few volunteers and then check with rest of the group for commonalities; or you can get the respondents to talk in pairs and then describe key aspects of their experience.

NB. If the mood turns out to be one you don't want to keep in the group, have respondents shake it out.

20. Myers–Briggs for brand personality

(Credit to Mike Imms for realising this usage of the Myers–Briggs Type Indicator.)

How does it work?

Myers–Briggs is a ready-made personality classification based on the work of Carl Jung. Some of the concepts such as introvert and extrovert are familiar, although they are defined in a specific way in the test.

Normally it consists of a battery of questions, but it is possible to identify the key questions and ask whether the brand fits those criteria. It can be done with research respondents or as a thinking exercise with planners or creatives.

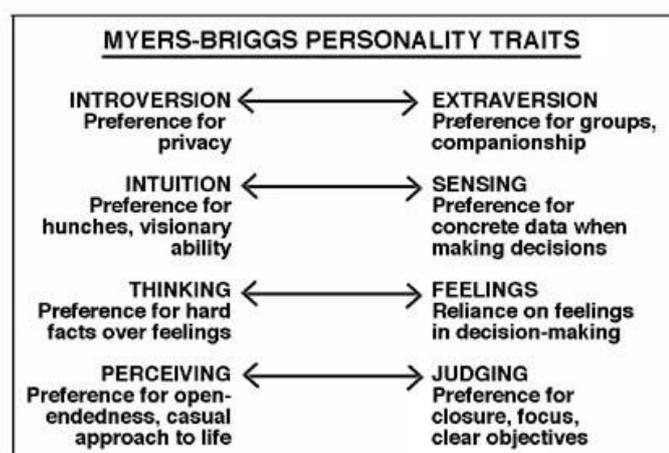
The value of this technique is that it is diagnostic so that if the brand is, for example, not as sensitive or extrovert as you would like, you have an idea of what is needed to reposition it.

How to do it

If you have done enough work with the brand to understand its personality, you can use the Temperament Sorter to assess whether the brand is predominantly:

- Extrovert or Introvert
- Intuitive or Sensing
- Thinking or Feeling
- Judging or Perceiving

The definitions of these are slightly different from common usage. You can find detailed definitions and a simple questionnaire on the [Myers–Briggs website](#), otherwise the table overpage works well.



Extrovert E	Vs	Introvert I
(Get energy from external events)		(Get energy from internal events)
<ul style="list-style-type: none"> Enjoys people Highly interactive Lots of relationships Interested in external interactions Performer Sociable Breadth 		<ul style="list-style-type: none"> Enjoys ideas Conserves energy Limited relationships Interested in internal reactions Audience Territorial Depth Intensive

Intuitive N	Vs	Sensing S
(Prefer to interpret information)		(Prefer being practical, the facts)
<ul style="list-style-type: none"> Sentimental Values feelings Hunches Future Possible Imagination Inspiration 		<ul style="list-style-type: none"> Consistent & reasonable Values logic Experience Past Actual Sensible 'Perspiration'

Thinking T	Vs	Feeling F
(Impersonal, logical)		(Personal concerns, people)
<ul style="list-style-type: none"> Realistic Facts Straightforward/plain speaking Practical Objective Rules Justice Impersonal Analysis 		<ul style="list-style-type: none"> Imaginative Theories Unusual/different approach Creative Subjective Values Humane Personal Sympathy

Judging J	Vs	Perceiving P
(Planned, orderly, controlled)		(Flexible, open)
<ul style="list-style-type: none"> Do in advance Plan Avoid working under stress Settled Decided Decisive Do Organise 		<ul style="list-style-type: none"> Spur of moment Deal with things as arise Like working under stress Pending Gather more data Tentative Wait and see Adapt

You end up with 16 possible combinations of E, I, N, S, T, F, J, P – each of which corresponds to a personality type (see overpage). Often the point is not to define the personality exactly, but to understand the

implications, and consider how to adjust it to meet the brand's objectives.

<p>ISTJ Traditionalists 13.7%</p> <p>Dutiful Practical Logical Methodical</p>	<p>ISFJ Protectors 12.7%</p> <p>Dutiful Practical Supportive Meticulous</p>	<p>INFJ Guides 1.7%</p> <p>Devoted Innovative Idealistic Compassionate</p>	<p>INTJ Visionaries 1.4%</p> <p>Independent Innovative Analytical Purposeful</p>
<p>ISTP Problem-solvers 6.4%</p> <p>Expedient Practical Objective Adaptable</p>	<p>ISFP Harmonisers 6.1%</p> <p>Tolerant Realistic Harmonious Adaptable</p>	<p>INFP Humanists 3.2%</p> <p>Insightful Innovative Idealistic Adaptable</p>	<p>INTP Conceptualisers 2.4%</p> <p>Questioning Innovative Objective Abstract</p>
<p>ESTP Activists 5.8%</p> <p>Energetic Practical Pragmatic Spontaneous</p>	<p>ESFP Fun-lovers 8.7%</p> <p>Spontaneous Practical Friendly Harmonious</p>	<p>ENFP Enthusiats 6.3%</p> <p>Optimistic Innovative Compassionate Versatile</p>	<p>ENTP Entrepreneurs 2.8%</p> <p>Risk-taking Innovative Outgoing Adaptable</p>
<p>ESTJ Co-ordinators 10.4%</p> <p>Organised Practical Logical Outgoing</p>	<p>ESFJ Supporters 12.6%</p> <p>Friendly Practical Loyal Organised</p>	<p>ENFJ Developers 2.8%</p> <p>Friendly Innovative Supportive Idealistic</p>	<p>ENTJ Reformers 2.9%</p> <p>Determined Innovative Strategic Outgoing</p>

NB.

If you are interested in brand personality, [Jennifer Aaker](#) has also developed a brand personality scale.⁴ Her father, David Aaker, wrote the classic *Building Strong Brands* and has a useful brand equity model.

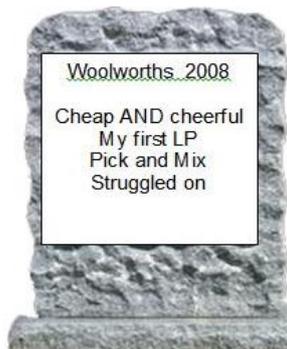
⁴ [Dimensions of Brand Personality](#)

21. Obituaries/School reports/Job applications/Letter to a brand etc.

These use a well-known format to provide structured information about a brand or organisation. The metaphorical format encourages the impressions and feelings as well as the knowledge to be included. Obituaries traditionally remind people of the good qualities of the deceased, so use them when respondents are critical or dismissive of a brand. School reports are more diagnostic and can provide a good summary of the strengths and weaknesses of a brand.

Job applications can show what people expect a brand to do for them, while writing dating ads shows the attractive characteristics of a brand or product.

Obituary or eulogy



Obituary for Woolworths in the UK

You can do an obituary to find out what people would miss about a brand if it was no longer around. You can do in visual format, or you can ask them to write a review of the life of the brand and include all the good things it has achieved.

They can make up what they don't know. Finish by saying it will be missed and give a reason why.

Job applications can be filled in individually by respondents. The respondent is the potential employer and the brand is applying for the job of being their mobile phone, headache relief, whatever. Ask respondents to write what the brand would say for given categories, such as:

- Previous experience/education
- References
- Strong points
- Reasons for leaving last job
- Times when you have shown initiative

You can use also School reports, dating ads – any format your respondents would be familiar with.

Letter to a brand

Simple but powerful, especially if it has been a long relationship.

Dear Optrex Eyewash,
I have loved you for a long time although you are
horribly expensive. I always felt you really left my eyes
clean and fresh and you must have had some mystery
ingredient to justify the price.
I am sorry to tell you I just met Tesco eyewash. He is
plastic, not glass (reminds me of a song by the Who -
something about plastic not being good enough) and
much cheaper, but actually using it feels just the same.
And you know what, I use much less because I can
squeeze out the right amount. Your bottle POURS. I
still feel loyal to you but I will be seeing Tesco a lot
more – sorry. I am going by the evidence of my eyes.
And my purse.

Describe how it was when you first met, how you feel now and what future prospects are for the relationship.

Brand contract

Ask respondents to think about their initial expectations of the brand/product, “I expected you to...”, “You said you would give me...”, and then write about whether it has been fulfilled or not. This is not only good for brand values but also for identifying latent consumer needs.

22. Observation, auto-ethnography, etc.

What are they?

While not projective techniques and only enabling in the broadest sense, they are included because they heighten awareness of behaviour and give access to more detail than interviewing alone. They are often used prior to interviewing, or as part of a longitudinal process.

Observation ranges from ‘ethnography’ (technically understanding the culture of groups and societies from an individual’s point of view) to ‘accompanied activities’ – accompanied shopping, stir-frying, baby bathing, you name it.

There is a spectrum of involvement from complete observer, totally external, to complete participant, living and working with the group you

are studying. In practice, most market researchers are somewhere in between, watching what happens and then asking participants to discuss it.

When to use them

All of these techniques help researchers:

- Analyse habits
- Understand products and processes in the real world; how they are used and misused
- Notice the private moments, the facial expressions, the gestures, the rituals
- See how social interactions between people can affect behaviour (respondents rarely have their friends and family around during an interview but these people have a strong influence)
- Find how the physical space affects usage and procedures; what is kept where, how workspaces are organised, how products fit into everyday life.

In interviews, respondents would not be able to remember the details – or even realise which ones were significant. It is mostly every day, habitual stuff they take for granted.

Auto-ethnography has increased in popularity with the advent of cameras on smartphones, webcams and wearable cameras. Wearable



cameras can be set to record the scene the participant sees in regular short intervals or to take video. The picture at left shows the [Narrative Clip](#), an HD camera that can store 4000 photos. Be careful about privacy when asking respondents to record their interactions with others.

Most commonly participants are asked to keep a diary, a photo diary, a blog, a vlog or simply to record every touchpoint relating to the brand. Auto-ethnography is also cost effective because it does not require the presence of a researcher. However, if the respondent has control there is a temptation to self –edit. One way of overcoming the possible self-editing bias is to use ‘the key informant effect’. Ask the family and friends of the participant to comment on the output. Even just asking the participant to comment on how they have presented themselves can be enlightening.

The ever increasing options for self-monitoring and tracking have developed into [The Quantified Self movement](#) providing endless options for researchers.

Pitfalls

- To engage participants you need to tell them a fair amount about the objectives of the study.
- As they describe the images they capture, there can be instant rationalisation.
- There is self-editing – they decide what to photograph and upload.
- It requires more effort on the participant’s part and they can get fed up.

23. Personification/Brand party/families

What are they?



Personification is used to give life and human qualities to inanimate objects and abstract concepts, such as brands and organisations.

Freud once said, “If you want to understand something, personify it.” People are the most significant elements in our lives, and therefore thinking about something in the same terms brings out the significance of it.

How it works

In research it is a sophisticated form of analogy/metaphor, in which participants are asked to visualise the product/brand/organisation as a person, and you can find out what that person would be like.

Personification can also be a drawn exercise. Online it can be a written exercise.

When to use them

When evaluating the various dimensions of a brand, it gives the most direct access to brand personality. It is valuable in packaging research when you need to go beyond 'cheap looking' or 'attractive', to distinguish between outwardly similar packs, and when you are getting a negative reaction but you can't understand why.



Timing & preparation

All you need is the pack itself, or a logo, and a warmed up group.

How to do it

Acknowledge that some people might find it silly, but ask them to go along with you anyway. Tell them it will help you enormously.

Pretend I have the power to turn this pack into a real person. As it becomes a person, I want you to see them standing there, and tell me who you see.



Sharon Maughn famously personified the sophisticated Gold Blend in the [award winning romantic serial advertising](#).

You may need to start them off by asking if it is male or female, young or older, and then keep prompting with where they live, what hobbies or interests they have, what kind of work they do, who are their friends, how they would behave at a party, etc. Aim for a really rich profile, and then find out how the participants would relate to that person.

It helps to do it with a competitive pack as a point of comparison.

Brand party is an extension of personification, which you can use when you have a number of brands in a product category and you want to find the relationships between them. It can also be for looking at one brand in a competitive context. Ask respondents to imagine that all the brands have become people, and they are all at a party. Ask questions to help them imagine how the brands would behave at this party.

- Which brand would be the host/hostess?
- Who would arrive first?
- What kind of party would it be?
- Which ones would be in the kitchen? Who would be dancing?
- Who would be ultra-cool and sophisticated?
- If any two of the brands met, what would they say to each other?
- Would you like to be there? Who would you talk to?

You can also make it a smaller dinner party or a family party, which gives you options to get more details about personality and behaviour.

Analysis

It is possible to get lost in the detail in both exercises. With personification you need to refocus on what it is about this personality that attracts or repels people. With the brand party, notice key behaviours or relationships that enlighten you about your target brand. Look for patterns of association across groups and consistent personality characteristics, and try to relate these to respondents' needs and to their self-image. Is this a person they want to have in their home, and want to be associated with, and if so, what role does he or she play?

Pitfalls

- If only a couple of respondents are willing to play along, sometimes a direct plea for more support will work, "Help us out here."
- Getting stuck with a famous character or another stereotype instead of a unique personality for the brand. (Probe similarities and differences.)
- Getting a user image rather than a brand image.

Brand families

Using the same principles, but this time the brands are all similar or closely related (for example sub-brands of Nescafe coffee, or a repertoire of products used by the same person, e.g. biscuits). You use the overarching metaphor of a family to discover the relationships between them and the characteristics of each. Who would be the father and grandfather? What type of father would he be? Who are the children/distant cousins, aunt locked in the attic, etc.?

24. Projective questioning

How it works

The Freudian version of projection is a defence mechanism whereby thoughts, motivations, desires and feelings that cannot be accepted as one's own are dealt with by being placed in the outside world and attributed to someone else. It is something people do naturally and spontaneously to protect themselves and to feel safe.

The concept of projection in QMR utilises this tendency and channels it to help answer research objectives. Projective questioning asks what *other* people do, feel or say and helps overcome barriers such as embarrassment, sensitivity, social desirability, lack of knowledge. It can be used as just a simple questioning technique, e.g. “Why are some people are embarrassed to say ‘I love you’ to their parents?”

The example below from [Family Care International](#) is part of a projective interview that shows images of different types of couples and uses sustained projective questioning, in order to better understand cultural attitudes to the use of birth facilities.

Family Care International – Skilled Care Initiative – Qualitative Research

A. PREGNANT WOMEN WITH MALE PARTNERS

Theme: Decision-making and Birth-preparedness

Separate images on same plain background depicting different kinds of couples – (i) younger woman w/ older man, (ii) “traditional” couple, (iii) “modern” couple, (iv) wealthy couple, (v) poor couple, and (vi) adolescent couple.

Research Objectives:

- ◆ To determine male family influentials' roles in birth preparedness.
- ◆ To explore male influentials' roles routine care-seeking.
- ◆ To identify specific stereotypes associated with care-seeking behavior.

For each couple, ask the following questions:

1. Looking at this couple, what can you tell me about them? Who are they?

How old are each of them? What do they do for work? Where do they live? Can they read? How much school have they done? Etc.

2. Where do you think this woman will deliver her baby?

Do both partners want the same delivery place/ attendant? What does each want and why? What happens if there's disagreement about where/ with whom the woman will deliver?

3. Will this couple do anything to prepare for the woman's delivery?

Do they discuss birth place/ attendant? With whom? Does anyone in their family put money aside for normal delivery? Who? How much? In case of an obstetric emergency? How much? Does anyone arrange for transportation to health facility? Who? What kind of arrangements? Are any traditional preparations made? What? By whom? Why? Etc?

25. Psychodrawing (free drawing) and clay modelling

How it works

It is an alternative form of expression for feelings that are vague and hard to describe. It brings a feeling to consciousness, then enables people to verbalise it, so it translates the emotional into the verbal via the visual. It's art therapy!

Clay modelling is very similar – the respondent makes a clay (or plasticine) model of their feeling, shaping it until it feels right, then tries to put into words what the shapes might represent. Although it seems more direct, in practice you spend a long time looking at the shape to help understand what it means.



A psychodrawing by a moderator about difficult respondents in research. "The shape that looks like a blue eye represents the horrible feeling of being watched by a client as a group goes wrong – it is cold and hostile. The swirls represent the stomach churning with anxiety and the green is negativity to the respondent who is causing the trouble – it's kind of slimy and non-human."

When to use it

When you suspect emotions may be complex, mixed or hard to elicit through other means. It's useful for emotions about more abstract concepts, like political parties, online privacy, moments of anxiety, close relationships, feelings about the future.

Timing & preparation

Plan for 15–20 minutes, including discussion. You will need paper, and crayons, pencils or pastels in a range of colours.

How to do it

Explain why you want them to do this task. Otherwise people may resist, imagining they are going to be 'psychoanalysed'.

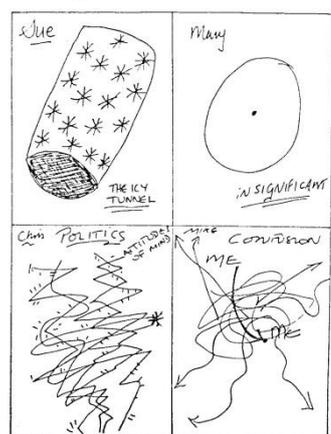
People are not always aware of all their feelings on a subject, and this exercise gives you a bit of time to become more aware. We have been doing a lot of talking, and sometimes it is good to try another way of expressing yourself. I would like you to put your feelings about X down on paper, using these colours.

Explain how you don't need literal interpretations, recognisable figures or things; it is more like abstract artwork. Nobody is going to judge it, and drawing skills are irrelevant. You need to get respondents to feel the feeling by getting them to visualise themselves in the situation. As they see and hear the situation in their mind, the feelings will arise. When

they have captured the feeling, they should draw it, almost without looking.

First let yourself become aware of the feelings about X. (Long pause) Bring the situation to mind, see what you saw, hear what you heard and allow the feelings to come. When you are ready, just start drawing, even if you have no idea how it is going to turn out. Let your hand just express the feeling. Just start anywhere, it doesn't matter what it looks like in the end, and it is what you learn from doing it that matters.

Fig. 3 Illustrative 'psychodrawings' of feelings about 'politics'



Don't let them get over-elaborate – they should know when it's done, and then they will need to shake out the feeling, so they are not aware of it anymore. As you can see at left, it is possible to gain a lot from simpler drawings: this one, which describes feelings about politics, was published in a paper by Peter Cooper of CRAM some decades ago!

Analysis

This exercise is of no value unless the person who made the drawing interprets it. If they find it hard to talk about, ask something like, “How did you start? What happened then? What does that bit suggest to you?”

Allow enough time for respondents to talk about their drawing, and respect each person's process. You could also ask them to talk with their neighbour about it before they share it with the group. This is an opportunity for everyone to help interpret, and is one of the occasions when the moderator can check out hypotheses about what they perceive in the drawings. It is important to ask and not make assumptions.

Pitfalls

The main one is a refusal to participate, and nobody should be forced to do it. You could ask the refuser if they would like to write about their feeling instead, or just say it is OK to sit out on this one, as long as they join in the discussion afterwards. More commonly you will get people making literal depictions – that is OK. Just use them as a starting point to probe the feelings.

Very occasionally it might be so successful that they experience a feeling so strongly that it becomes uncomfortable. If it is upsetting respondents, then stop the exercise; provide empathy, care and attention, and then ask the group if it is OK to move on.

NOTE: Other types of drawings

A lot can be learned by having people draw users, what they remember of packaging, brands, etc.

Clay modelling



This is used infrequently nowadays as it's messy and time consuming – and lots of people are allergic to clay! However it can be done with plasticine or modern modelling materials.

First you retrieve the feeling (as in Psychodrawing). When the feeling is at its most powerful the hands shape the clay into a representation of the feeling. You can see some examples on the left. It's then a matter of working out what the shapes represent, which

can be a long process and needs the help of a colleague or facilitator. It's delicate but it can be quite powerful.

26. Role play, Simulation and Enactment

How it works

Stepping into a role allows a richer experience, and overcomes the tendency to rationalise. It is also safe, since players de-role at the end. Role play is used in business training to integrate learning and action, and also has roots in psychodrama. Psychodrama is based on the principle of acting out feelings and emotions that are locked in the body. An emotional problem is personified and made into a story, with other members of the group taking relevant roles (which may represent other people or fragmented parts of the self, such as 'the part of me that is always anxious').

"We are neural beings. Our brains take their input from the rest of our bodies. What our bodies are like and how they function in the world thus structures the very concepts we can use to think. We cannot think just anything – only what our embodied brains permit." – George Lakoff



Haimerl and Roleff⁵ point out that role play and psychodrama integrate the methods of interview, observation and experiment. The techniques reproduce the spatiotemporal and social context, the behaviour is experienced subjectively and the participant can be interviewed about it immediately after the experience.

There is another way of looking at the importance of the body – *our thinking is embodied*. The mind is **enactive**, created through the constant interaction of the organism and its environment. The mind operates through the cells and sense organs of the body and is so thoroughly rooted in the body that our very ways of thinking are shaped by our physical presence in the world.

When to use it

Role play offers emotional depth, so it is useful when you want to know “What does it feel like...?” when that experience is not easy to put into words. You usually need some time, space and participants who would be willing to do it.

Haimerl and Roleff mention the use of role play for understanding why a product category is used, and for testing brand and advertising concepts. They give two case studies – obstacles to buying sex magazines and skin care products for men.

There are variations, and some of them can be done quickly.

Timing & preparation

You have to plan to do a role play. You also need a trusting and willing group, which perhaps has already participated in some projectives. Allow 20–30 minutes. You will also need space to move around.

How to do it – role play

Don't call it role play; say it is a bit like charades. Ask them if they are willing to do something a bit different to understand the research question. Give an example from another product field by acting it out yourself. Don't use it if you wouldn't do it yourself.

⁵ [Haimerl and Roleff Role Play and Psychodrama in Market Research: Integration of Observation, Interviews and experiments](#)

Set the scene and supply a scenario for them, so they can concentrate on getting into the roles. Try to involve everybody, if only as support. Allow some rehearsal time for getting into the role: this is when they work out what the characteristics of the product really are.

How to do it – role projection

Like personification, but the respondents become the brand and describe themselves as the brand in the first person. You can have one respondent be the brand or allow them to have a helper. After some rehearsal time, you and the group interview the brand. You need to introduce some liveliness and momentum, so keep the questions coming: Describe what you do at weekends. What are your pet hates? Where do you live? Where do you go on holiday? What team do you support?

A variation is that they don't tell the group which brand they are and the group have to guess through their questioning.

This can develop into **role drama**, where they actually behave as the brand, and their body posture, tone of voice and mannerisms all say something about the brand. You can ask competitive brands to talk to each other, or to pretend they are on the shelf attracting the attention of a consumer.

Ask the brands what they did to get into character, to help you sort out how much of it was the respondent and how much was the brand. If they really get into the roles, make sure you de-role at the end. To do this, ask them what they had for breakfast, or where their car keys are.

How to do it – role enactment

Respondents pair up and become user and product. Laundry liquid and clothes, shoe polish and shoes, shampoo and hair. Let them act it out and then discuss how it felt, what was their experience?

How to do it – sub-personalities or empty chair work

This is useful where there is ambivalence about a product. It enables the different parts of a respondent to talk to each other. You might have a part that really enjoys eating chocolate, and a part that feels guilty about it. You ask the respondent to have a conversation between those two parts – perhaps a debate about whether to buy a favourite chocolate bar.

It helps if one part is sitting in one chair, the other is visualised as sitting in another chair. The respondent can physically move between the chairs in order to act the parts.

You could also have respondents talk with their hair or their feet, or any other part of them that needs to be given a voice. (You could do this with bubble drawings too, although it is not so interactive.) A person representing the brand could then enter the conversation and you could create a scenario. This procedure can be exposing for the person who does it, and you need to make sure they feel supported. You can give each chair an ally, another person whose role it is to understand that chair's point of view. This is called doubling. The ally or double can also help explore feelings and reactions. Feedback from the allies is useful at the end.

Make sure everyone has time to give feedback from this, and that the sub-personalities are reunited by de-roleing.

How to do it – brand modelling or sculpture



This is more like miming the brand, with respondents expressing their feelings about the brand using body language – posture, gesture, rhythm, movement or stillness. You could have them walk across the room doing the brand walk, or as groups of three or four make a tableau of the brand. Ask them, “How would Marcel Marceau do brand X?” to explain what you are looking for.

Analysis

Because role play is in the physical dimension, the information you gain from it has to be put into words before you can do anything with it. The most important part of the learning is from respondents' own experiences, which they need to describe to you afterwards. You can also comment on things you noticed, but in a non-judgmental way. Probe gently if it was significant for the respondent, e.g. “I noticed you were talking much faster when you were Lavazza than when you were Kenco. Were you aware of that?” Allow enough time for feedback and reflection after the role play, and also ask respondents again before the close of the group whether there is anything else that has come out of it for them.

A video record of the process is useful for more reflective analysis. This benefit is offset if the filming is distracting to participants.

Simulation and enactment

You can get some of the advantages of role play without the baggage by calling it simulation or enactment. It can be as simple as pretending to push a shopping trolley around to recreate that slightly hypnotic experience of being in a large store, or practising using a mobile phone to pay for an item.



One example was in a research project about mobile payments. Respondents debated a long time about the advantages and disadvantages of this payment method – but just acting it out themselves with their own phones and a pretend terminal gave them a much more realistic perspective. They suddenly realised what the words ‘quick and easy’ really meant.

27. Self-scripts

How they work

Self scripts ask for detail about a process, which encourages self-reflection, and they are written in a way which minimises self-censorship and encourages self-revelation. The **script** is the part that gives the detail – you are asking people to write a script for a short film that describes a scenario. The **self** part is that the writer is the main character but has to write about themselves in the third person, which gives the psychological distance for safety.

When to use them

They work best for (purchasing or usage) processes or situations, where the respondent is the main actor in the situation.

Timing & preparation

You'll need pens and paper and plan for between 10 and 20 minutes. It's a great idea to set them as a pre-task, so you will have time to read them before the interview.

How to do it

Give them a title, e.g. 'Buying jeans' and ask them to write as much or as little as they want, writing about themselves in the third person. They are to see themselves as a main character in a play or a film, being observed by somebody who knows them really well. It should have enough information that an actor should be able to act out that script. Give them an example of a starting sentence such as ("Joanna was idly walking through the shopping centre, with some time to spare..."). When they have finished you can ask if they discovered anything they weren't aware of previously and look for commonalities.

Impulse Shopping

There was a selection of paintings at the rear of the shop. Then one of the paintings seemed to leap out at John. It had to be that one. He knew he had to make the decision there and then. There was a slight difficulty he didn't have enough money on him. Knowing his own mind John realised that if he left he would not come back. He paid the shop a deposit for the painting, the decision was made...

The example at left is from [Bayley and Nancarrow's classic paper](#) on this impulse purchasing. They used laddering and self-scripts to define and understand various forms of impulse purchasing.

28. Sentence completion

What is it?

Some people are surprised to discover that sentence completion tests have been used to assess personality traits ([Rotter Incomplete Sentence Blank](#)), managerial motivations ([Miner Sentence Completion Test](#)) and ego development ([Washington University Sentence Completion Test](#)).

How it works

The first part of the sentence (the stem) sets up the context or the issue and then the respondent fills in the rest from their own attitudes or feelings. If it is done quickly enough you may well be accessing [System 1](#) thinking – immediate impressions and associations – although you will also get System 2 responses.

When to use it

When you need responses that lie just beneath the surface. It can also be done in depths, self-completion questionnaires and in groups, although it is an individual technique.

Timing & preparation

A sheet of 10 to 20 sentences takes 5–10 minutes. You will need to experiment with the types of sentences you use.

How to do it

"We want to get some more understanding of what you think about the subject of X, so I'm just going to ask you to fill these in. It is important you don't spend too long thinking about them, just put down whatever comes into your head."

Examples:

Women who let their children play in the street are...

My hair feels great when...

The perfect coffee is...

I get annoyed in the shops when...

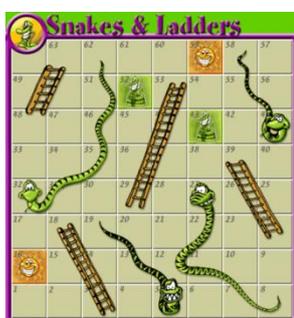
At a party I worry about...

You can repeat the same sentence to see if you get variations in the answers.

Analysis

Analysis is usually of the themes that arise from the answers.

29. Snakes and Ladders



Or Chutes and Ladders as it's known outside of Europe. The reference paper for this is [Snakes and Ladders Marketing by Stephen Phillips](#).

How it works

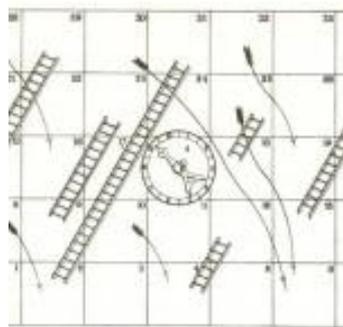
This is an extended metaphor for the decision/purchase process – which importantly does not assume it is linear. It records what helped towards the goal (ladders) and what setbacks there were (snakes).

Ladders will include both information obtained and decision-making heuristics, while snakes will be realisations that something was unsuitable, unwanted or unaffordable.

When to use it

Best in a depth interview when you are following a longer process for purchasing a major item, and you want to capture all the disappointments, blind alleys, changes of mind etc. that happened along the way. It's harder in a group, as each person's process will be different. It's not so great online, unless you are using it as a summary of a purchase process. Then you can upload a blank board and have respondents annotate it – or add the images of snakes and ladders if the software will allow.

How to use it

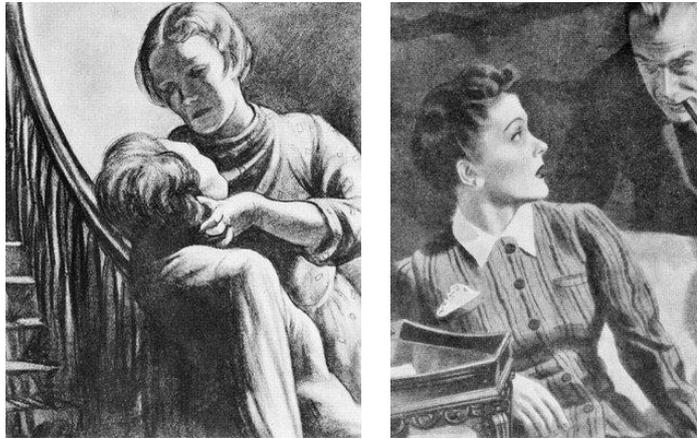


Use a plain board, establish the goal and the starting point and then chart the journey. Anything that was really helpful to decision making is a ladder (they can be different lengths) while anything that set back the process is a snake. Let the respondent have control of the snakes and ladders and the overall progress.

Pitfalls

Not being able to remember enough detail – so get them to keep a diary beforehand if you can.

30. Storytelling



What is it?

The Thematic Apperception Test (TAT) relied on giving people images of ambiguous situations and asking them to tell the story of what happened before, during and after the scene depicted. The stories were analysed for themes and imagery relating to specific motives. The scenarios are dated now (and some look a bit creepy) but the principle works with any image that can form the basis for a story.

TATs are also known as projective story exercises, and can be easily used in online research. There is a [paper from Anderson Analytics](#) showing a more sophisticated usage of the technique that includes content analysis of 300 stories, using text mining.

How it works



Start with an image or a scenario relating to the research issue, and ask participants to create a story around it. By using the structure (characters, plot, action) you employ a familiar method. Stories invite involvement and allow self-projection.

When to use it

Especially useful with image-driven categories, products or brands, such as cosmetics, drinks, cars, and also in advertising development and exploratory research into experiences.

The example below is for train travel.

Timing & preparation

You need visual or audio stimulus as a starting point. It doesn't matter how rough or finished it is because you are going to transcend it anyway. The full technique takes about 20 minutes if you include the presentation of the stimulus. It is possible to build entire depth interviews around it. You can do shorter versions to just to establish the protagonists, their motivations, and the outcome.

How to do it



Explain that you are going to show them something and that you want them to make up a story around what they see or hear. You will help them with the story by asking questions about various aspects, and you would

like it to be a joint effort. (In practice you supply the framework and they supply the content.)

Guide them through. It helps if you start by asking them to talk about the scene: where is the story set, and what does it feel like to be there? Then look at the characters – the individual personalities shown: Who are they? What do they do? What are the relationships between them? Is there a group personality or mood? What are they talking about? Who likes or dislikes whom? Who do they relate to the most? Where are the emotional trigger points/ what is likely to happen?



You get a lot of information without actually having to create much of a story. Respondents might have their own ideas about the storyline, or you can help them look for protagonists, antagonists, tragedies and happy endings.

Analysis

The story itself is not the point. You are looking for:

- A broadening of understanding about the brand personality or the brand values – or the nature of the experience
- Signs of emotional involvement with the characters and what that means for the brand
- Identification with aspects of the story or the brand (self-recognition/aspirational identification/image identification)
- Diagnostics – identification of any executional problem areas, guidance in casting and characterisation, and an understanding of the role of props and cues in creating the desired effect.

Pitfalls

- In a focus group there are always some individuals who will contribute more to the story. As long as the quieter ones acknowledge it fits their ideas about the brand, this is usually OK.
- Over-dramatising/ falling back on a well-known storyline. You need to catch this as soon as it starts, explaining a relevant story is better than an exciting one, in this case.

31. Serious Play

This name is copyrighted by Lego, who developed the technique and have produced a [White Paper](#) about the technique. However that has not stopped research agencies offering a similar product under other names.

How it works

Hard to categorise – it's expressive, it's a construction technique, and it uses metaphor. Serious Play has a slightly disarming element to it, because it uses children's building blocks.

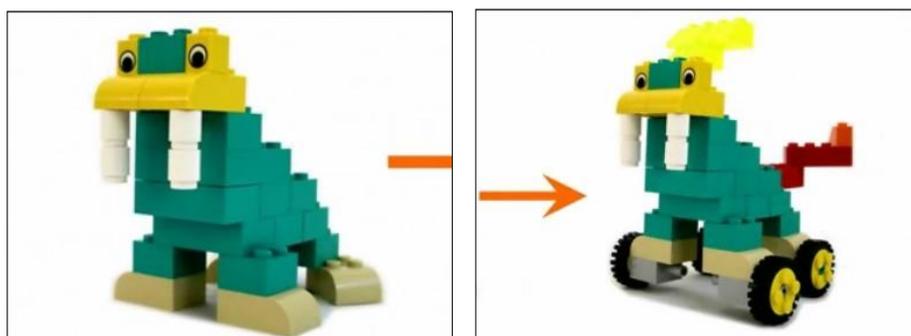
Serious Play allows people to share and bond, to express abstract aspects of their experience that might otherwise be difficult to express, and of course also employs storytelling and metaphor. The act of constructing itself is a metaphor for the construction of knowledge.

When to use it

It's great for issues involving identity or experience, both of external brands and organisations and for internal work. It's also useful for innovation and product development. It's definitely better as a group activity and is often used in workshops.

How to do it

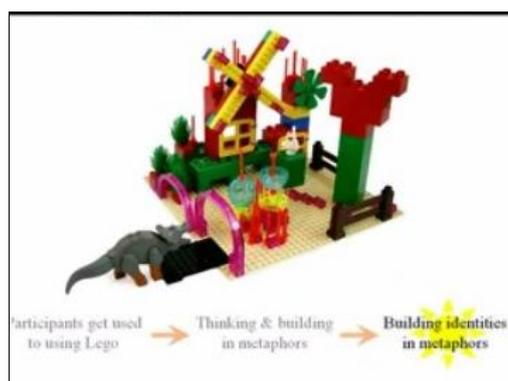
1. Each person gets a bag of building blocks and assorted other items (people, trees, whatever is available). If they don't have what they need, they'll build it.
2. Get them used to handling and playing with the blocks. Ask them to build something easy, e.g. an animal, or something related to an interest or hobby of theirs. This is the warm up phase.
3. Then ask them to adapt that model to make it more expressive. Now you are moving into metaphorical thinking.



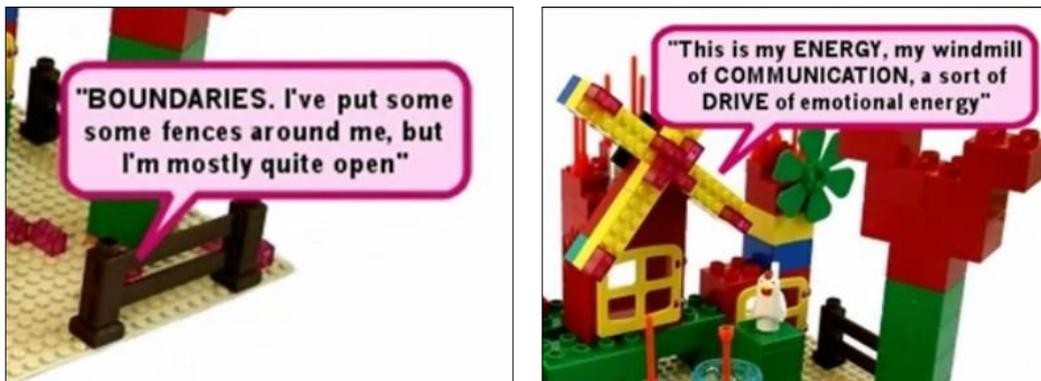
From [Gauntlett's excellent video on the process](#), showing first a walrus; then a walrus with a Friday afternoon feeling!

!

4. Once confident, participants can start to build a 'how it feels to be' or a 'this is what it's like when I am in' or 'this is how I feel about learning science' and so on. Each will be individual.



5. Most importantly, they need to be given time to share, discuss and interpret what they have made. Ask them to share with each other first in pairs, then in smaller groups, then capture the key relevant points – there will be so much that you will have to make choices about what is most important.



32. User image

What it is



There is an important difference between brand personality and user image. Brand personality derives from the way the brand is positioned, how it looks, communicates, performs. User

image relates to the sort of person who is perceived as using the brand and may be completely different from the brand personality.

A second potential confusion relates to respondents not understanding fully what you mean. Many brands are used by a very wide range of people in reality, and respondents will tell you there is no 'typical user' – it could be anybody. In that case tell them you are looking for a user stereotype.

When to use it

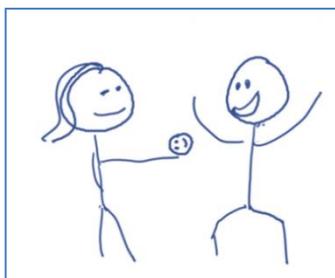
User image is especially important for brands that are bought for identity, status, security or belonging.

How to do it

Options:

Choose **users and/or lifestyles** from a picture sort or mood board and then describe more about them

Draw the brand user (stick figures with annotations will do)



Shopping basket

Show respondents a shopping list or a basket that includes the product and ask them to describe the shopper. (In the classical research on this there was an identical one without the key product, shown to the control group for comparison.⁶) You are doing this to check that the respondent sees the user image as positive in relation to themselves. A lot of products are chosen (at least partly) to demonstrate that people belong to a particular social category (or could belong).



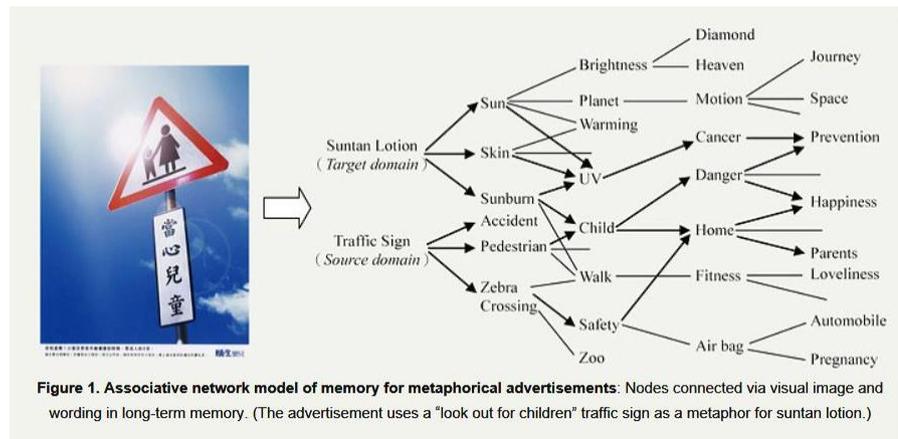
The key theory here is of reference groups, of which there are four main types:

- Avoidance (Negative towards it, don't want to join)
- Disclaimant (Negative towards it, but are a member)
- Contactual (Positive towards it, are a member)
- Aspirational (Positive towards it, currently a non-member)

It is also about identifying with the brand, conforming to expectations, feeling safe because other, similar people are using it and so on.

⁶ [Projective Techniques in Consumer Research, Steinman](#)

33. Word association



How it works

This is pure System 1 thinking – quick and associative.



Once the associations are generated there are various forms of analysis possible. Or they can simply be used to help explore the subject.

[Image from Singapore Management University.](#)

A paper by Paul Marsden on associative meaning mapping shows how to build a group level summary map from individual chains of meaning.⁷ Brand image refers to the set of associations linked to the brand that consumers hold in their memory. Brand associations help the consumer to process, organise and retrieve information from memory to aid product choice. Word association helps provide the brand association structure.

When to use it

- It makes a good jumping-off point for exploring a brand, a product, a personality or an idea. For a large and rich subject, for example train travel, a good word association can act as a user-generated topic guide.

⁷ [‘What ‘Healthy Living’ Means to Consumers; Trialing a New Qualitative Research Technique](#)

- It is also a good warm-up for a set of projective exercises. Its purpose is to facilitate the process by getting people into a more creative way of thinking.

Timing & preparation

It is quick, and you don't need any materials unless you want respondents to write down their associations individually, in which case give them cards or sticky notes.

How to do it

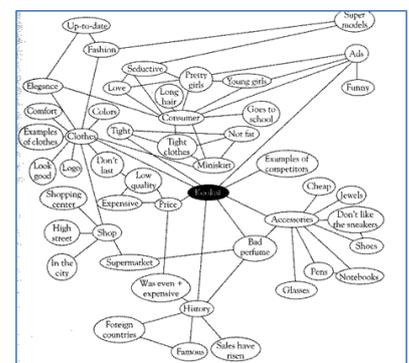
You can say something like, "I'm going to say a word (product/brand name) and I would like everybody to think of the first word that comes into their mind. Don't worry if it seems illogical or silly, it has to be quick." PUT ENERGY INTO YOUR VOICE.

They can say the words out loud or write them down individually before they share them. Saying the words is much faster, but you have to capture them all quickly. Writing takes longer but you can then see which words were most commonly associated, and you can move on to getting respondents to group them together on the table. This often generates further associations, and the process of grouping gives important information too.

You can use **X Rays** when you are trying to 'see through' a brand or a name. It's still association (verging on metaphor) but this time you ask for specific things – verbs, types of music, colours etc.

Analysis

As you can see from the Kookai word association map to the right, just sorting out the clusters of associations can be quite enlightening, but more sophisticated forms of analysis can be applied.



There is a similar technique called

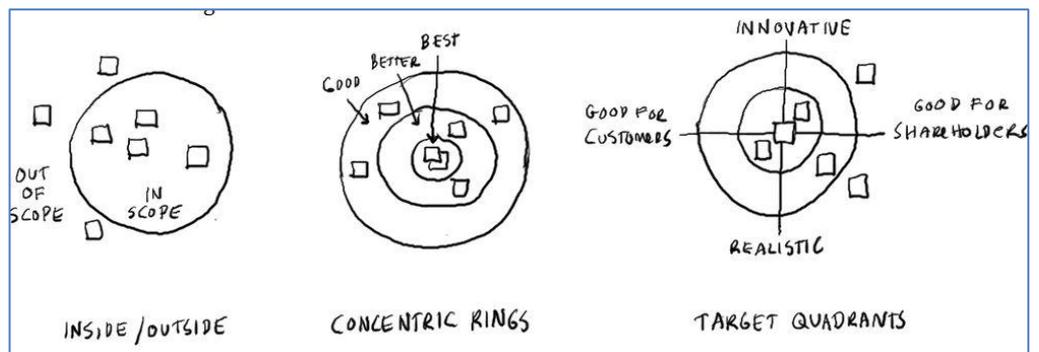
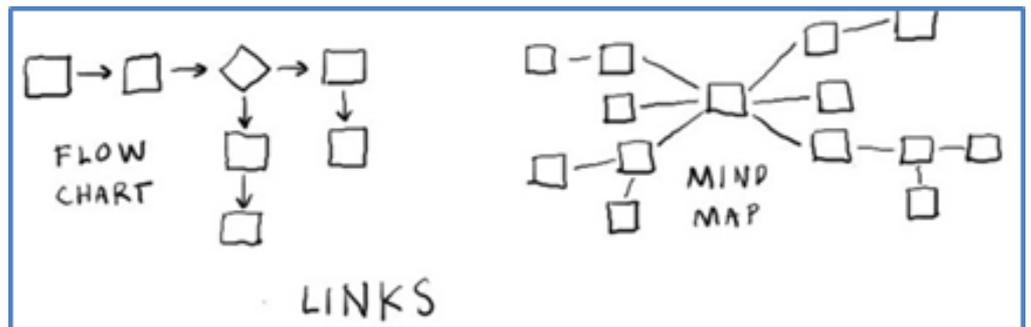
[Freelisting](#), which can be done online and is about understanding semantic domains.

34. Visual thinking

What it is

This is the subject of a whole other book, and fortunately this book exists – it’s called *Gamestorming* by Gray, Brown and Macanujo.

While it’s mainly intended for workshops, there are lots of ideas for helping respondents to structure their thinking, and many of them require only sticky notes and pens.



Briefing notes on key theories

How the Unconscious become the Nonconscious: from sex-crazed monkey to behavioural guidance systems

Timeline

Freud popularised the unconscious and defence mechanisms

Jung emphasised the role of archetypes and the collective unconscious

Psychodynamic theory made the concepts more accessible

Edward Bernays used Freudian ideas in PR

Neuroscience shows over 90% of brain processing is out of conscious awareness.

Neuromarketing develops.

Behavioural economics alerts us to nonconscious biases

Evolutionary psychology added the idea of the adaptive unconscious and behavioural guidance systems

2014 First Nonconscious Impact Measurement Forum

1. Unconscious, subconscious, pre-conscious

A lot of people use the terms interchangeably, but generally the unconscious consists of memories, wishes, ideas, beliefs, maps of reality that cannot be brought into conscious awareness easily, yet can still influence behaviour. The subconscious consists of information and beliefs that are more readily accessible and easily triggered, while the pre-conscious is material being processed that will probably become conscious.

There are differing perspectives on what the unconscious is, so it's probably easier to talk about 'outside conscious awareness' or 'nonconscious' when discussing the material projectives can access.

2. What was the Freudian unconscious?

Freud has to be credited for popularising the concept of the unconscious. Psychoanalysts see it as the largest and most influential part of the psyche, and the source of our motivations. Unconscious 'ideas' have emotional charges and therefore strive for expression in the conscious. Because some can be perceived as threatening to the integrity of the personality, defence mechanisms are employed to moderate or subvert their effects. You have probably seen many of these at work in QMR. Defence mechanisms include:

- Denial: Blocking external events from awareness. Usually a temporary phenomenon.
- Repression: Motivated forgetting – not being able to recall a threatening situation or event.
- Projection: The uncomfortable feelings are projected onto someone or something else. Displacement is a similar mechanism, which works when the original target of the desire is too threatening, and the wish is displaced onto another target.
- Fixation: The ego is fixed at a certain level of development instead of progressing further.

- Regression: Reverting to an earlier form of behaviour when under stress or threat.
- Intellectualisation: When the emotion is stripped from a difficult or threatening idea and it is treated as an intellectual curiosity.
- Introjection or identification: Taking somebody else's attitudes or personality characteristics into your own (catchphrases, celebrities, fashion trends, peer groups).
- Reaction formation: Developing a pattern of behaviour which is the direct opposite of the unwanted impulses or desires, e.g. becoming puritanical or moralistic.
- Sublimation: The transforming of an unacceptable impulse into a socially acceptable, productive or creative form.

The [Defence Mechanism Test](#) was successfully used in the 1980s in the selection of pilots for the Swedish Air Force. It claimed to identify the more accident prone ones before they climbed in the cockpit. However the test has not been widely validated.

Id, Ego and Superego – A tripartite structure of the psyche

The **Id** translates the organism's needs into drives or wishes, which ensure that all physiological needs are met. It works according to the pleasure principle (*I want it and I want it now*) and is entirely selfish.

Advertising can be directed to the Id.



As the infant develops, a small part of the Id begins to realise that it has to work according to the reality principle: *I can take care of my needs when I have the appropriate objects and circumstances.*

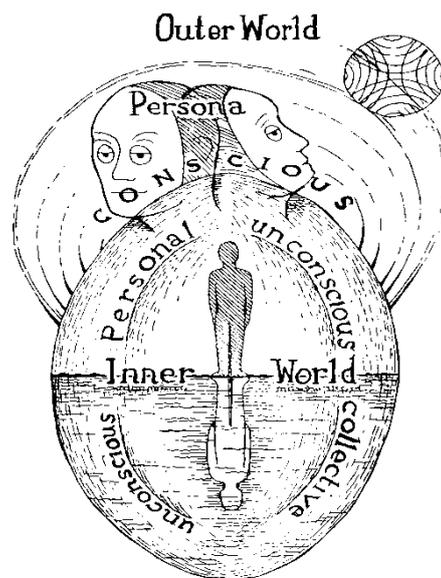
This becomes the conscious **Ego**, the problem solver, the mediator between desires and reality.



Freud viewed all human thought as a conflict or compromise between the pleasure principle and the reality principle, and saw much behaviour as a reduction of the tension between the two.

The **Superego** consists of the conscience and the Ego Ideal and should balance out the Id. When you hear 'should', 'ought', 'mustn't' it's the Superego speaking. Freud's view of the psyche is summed up by the description, "A maiden aunt and a sex-crazed monkey, locked in mortal combat in a cellar, refereed by a rather nervous bank clerk."

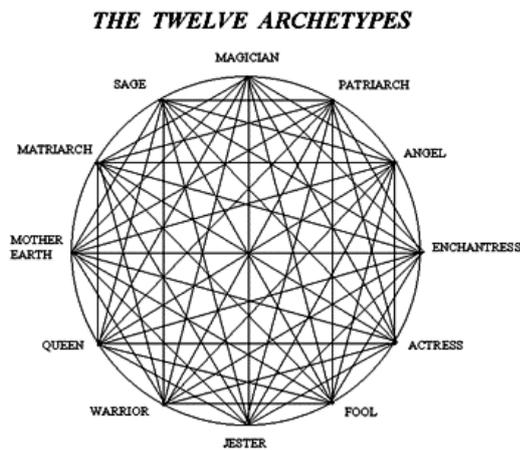
3. Jung and the collective unconscious



Jung painted a different picture of the aspects that make up the individual. There is a broad correspondence in that he had an Unconscious, a responsible, controlling Ego, and a Higher Self. His view is that the unconscious consists of a personal unconscious and a collective unconscious.

The **Shadow** is an archetype of the collective unconscious. While it is part of the dark and primitive side, it is also the source of 'gold' – it holds all we need to become fully integrated as people. The Shadow is not to be repressed or run away from, it is to be discovered (through dreams and symbols) and integrated into conscious life.

The **collective unconscious** is a storehouse of latent memory traces inherited from the human ancestral past, symbols of common evolution. (This presages the 'behavioural guidance systems' from evolutionary psychology.)



Archetypes arise from the collective unconscious, as patterns shared through our common humanity. An archetype is a preformed tendency to create an image, like a dry river bed which shapes the flow of water. It is always changing but is essentially the same. We know them through myths and legends, fairy tales, sagas and stories, in which there are many parallels.

4. Psychodynamic theory

Psychodynamic theory is a broader derivation: a way of seeking integration between variants of psychoanalytic theory. Elements of it can be found in many current theories, from Transactional Analysis, to Family Systems, to NLP. The themes relevant to QMR include:

- As a result of upbringing, trauma, social expectations, etc., the psyche is split into different parts (which can be named and defined in many ways, from ‘unconscious’ to ‘sub-personalities’, real self and false self)
- These different parts have different agendas and so conflict arises
- The conscious part of the mind is not fully aware of these deeper dynamics but they influence attitudes and behaviour

Usefully, the ideas of **Transactional Analysis** frame the parts of the unconscious as Parent, Adult and Child, which seems a lot more acceptable than Id, Ego and Superego. There are many occasions when it’s appropriate to use this implicit model of the unconscious – for example, where there is an inner dialogue between a temptation and a voice of reason, and you understand more about it in research using bubble drawings and role play.

5. The Unconscious in public relations

Edward Bernays developed public relations as we know it. He was a nephew of Freud and was called the Father of Spin. He was also influenced by the ideas of crowd psychology developed by Gustave LeBon and combined them into a technique he called the ‘engineering of consent’, by using mass media and psychoanalytic theory. Many of the ideas he developed are taken for granted in advertising and PR today.

"If we understand the mechanisms and motives of the group mind, it is now possible to control and regiment the masses according to our will, without them knowing it."

6. Neuroscience updates the unconscious

In the 1990s, 'the Decade of the Brain', the increasing popularity of **neuroscience** led to a different model of the unconscious. The brain does an immense amount of pre-conscious filtering; processing, sorting and categorising of stimuli of which we have no awareness.

Neuroscientists have shown conclusively that unconscious stimuli influence feelings and conscious decision-making. This material includes:

- Stored, relatively unprocessed material (low involvement processing) which can be brought to mind using techniques, for example collages and associations to elicit brand imagery.
- The habitual: Processes that have been automated by the brain. This comprises much regular behaviour, including driving and some forms of shopping. However there is now a lot of work on how to analyse and change habits and many research techniques can be adapted for this.
- The emotional: In the form of somatic markers, emotional tags that are applied to our surroundings at a very basic level to mark things as positive/approach or negative/avoid.
- Plus a great deal about brand encoding etc. The classic text is *The Mental World of Brands* by Franzen and Bouwman.

Add the social and cultural

The recent emphasis on the social and cultural has shown us that people are generally unaware of the extent of the influence of others, or our cultural rules about what is acceptable and desirable.

- The cultural: Assumptions about the right way to do things that are invisible to the person who owns them; rituals, rules about dress and behaviour, the socio-cultural frames people use to interpret the world.
- Social influences: Prejudices, reference groups, distortions for the sake of congruence and conformity, gender roles, status, and social currency. Many people are just don't realise how much they are influenced by others.

7. Behavioural economics and Systems 1 and 2

System 1 is arguably replacing the unconscious or pre-conscious as a justification for using projective techniques.

Behavioural economics (BE) was born after traditional economics got into bed with cognitive psychology. The love-child, BE, now investigates what happens when real people involve their emotions and use [heuristics](#) (short cuts) in decision-making. For example, in a falling market, many people hold onto their shares for too long (the endowment effect means people overvalue what they have) and the loss aversion effect means they really hate taking a hit on their trade. So they don't minimise losses in the way a rational model would predict.

Key concepts include

- Behavioural architecture to 'nudge' people towards better choices
- Better use of default options – which many people take when decisions are very complex or emotional (e.g. The default of opting in to be an organ donor triples the number of donors)
- Cognitive biases – both major and minor, but lots of them
- Heuristics – short cuts used to make decisions
- Theories of persuasion, back in the limelight through BE

Imagine a person who is very quick thinking. He or she can sum up a situation quickly, knowing what cues to look for, and can take immediate action. (It's called thin slicing, the ability to find patterns in events from very narrow windows of experience.) It would be good to know a person like this, who is very adaptable, can keep out of danger, and can stay on top of fast moving situations where a lot of decisions have to be made. The good news is, that person is you. In Daniel Kahneman's terms, that is what System 1 thinking would be like if it were a person.

Other great characteristics are:

- Generates impressions, feelings and inclinations
- Operates automatically and quickly
- Mobilises attention, especially when there is a change from the normal
- Executes skilled responses and generates skilled intuitions (after adequate training)

Fast thinking is going to have some drawbacks too:

- Jumps to conclusions
- Operates automatically (subconsciously) so you don't know whether its short cuts are necessarily the best ones
- Makes decisions on the basis of impressions, feelings and stereotypes, even when a more rational approach would be better
- Infers and invents causes and intentions
- Is subject to a range of biases as a result of these limitations

You can see how such a way of thinking could have evolved, but you will also be aware that you can think quite rationally. System 2 is logical, calculating and conscious. It can compare and contrast, make chains of inferences - everything we think of as the higher thought processes. (It has its own biases too.)

But sadly it's also relatively slow and gets tired easily. It's called **cognitive depletion**, that desire to reach for a chocolate bar after intellectual effort, or you just switch to System 1. So having narrowed down your choice of fridge freezers on all the rational criteria you opt for the one with the cool blue light on the outside, and a swishy handle. Your systems work together. All those impressions, feelings and inclinations from System 1, when they are endorsed by System 2, become beliefs, attitudes and intentions. System 2 can train System 1 on what it should look out for, and it can programme the memory to override habitual responses.

Another role of System 2 is to rationalise the behaviour of System 1. Human beings like to feel in control and need explanations for everything that happens. So System 2 explains, justifies and rationalises the actions of System 1. A series of experiments on [choice blindness](#) has shown this in action: "we have consistently found that participants often fail to notice mismatches between what they choose and what they get. In addition, we have found that participants often confabulate arguments why they actually prefer the alternative they had initially rejected."

*The rational mind
thinks it's the Oval
office, when actually
it's the Press office." –
Jonathan Haidt*

8. Implications of BE for research

- Set research in context (memory is strongly influenced by context)
- Use immersive research and ethnography as people are poor witnesses to their own behaviour
- Be careful of the order of talking about stuff/presenting stimuli (anchoring bias)
- When researching decision-making processes don't recruit people who have already made the decision – they will likely justify it
- If you are following a decision-making process expect a mixture of quick short cuts and rational evaluations – watch out for people becoming overwhelmed by information
- Many biases relate to a need to maintain a sense of consistency and self-esteem – make it all right for people to change their mind
- Work out what short cuts people use to make decisions
- Be suspicious when people say they don't respond to free offers and numerous other 'marketing gimmicks'
- If you are assessing a number of product options (combinations of features and prices) try to use the experimental method where possible because the parameters set by one will frame the other
- Be careful how you write stimulus material, especially in relation to implied gains or losses. 'Cognitive ease' (easy to read and understand) tends to make material more believable.

9. The missing link – where the biases arose



Palaeolithic and Neolithic (Stone Age hunter-gatherer) man evolved relatively slowly for a long period of time – 200,000 years by some estimates. During this time structures of the brain and endocrine system

evolved to help man survive an unforgiving environment.

Food resources were precarious, there was a constant threat of physical harm, and anyone without quick reactions would have an even shorter

lifespan. The heuristics which we now see as cognitive biases were designed by evolution for error management; they would err on the side of keeping us safe.

- Loss aversion makes sense when losing a source of food could mean death; as does the endowment effect when you have food
- Prejudices and stereotypes minimised harm from strange foods and strange people
- Choices were simple – not many flavours of sabre tooth tiger!
- Affiliation with a tribe was essential for safety, so social proof and the status quo minimised violations of tribe rules
- Decisions and reactions had to be based on the environmental context
- Temporal discounting (small reward sooner rather a larger one later) was logical when you could not predict the future.

10. The adaptive unconscious

In *Strangers to Ourselves*, Timothy Wilson repurposes the unconscious as a set of “*mental processes that are inaccessible to consciousness but that influence judgment, feelings, or behaviour*”.

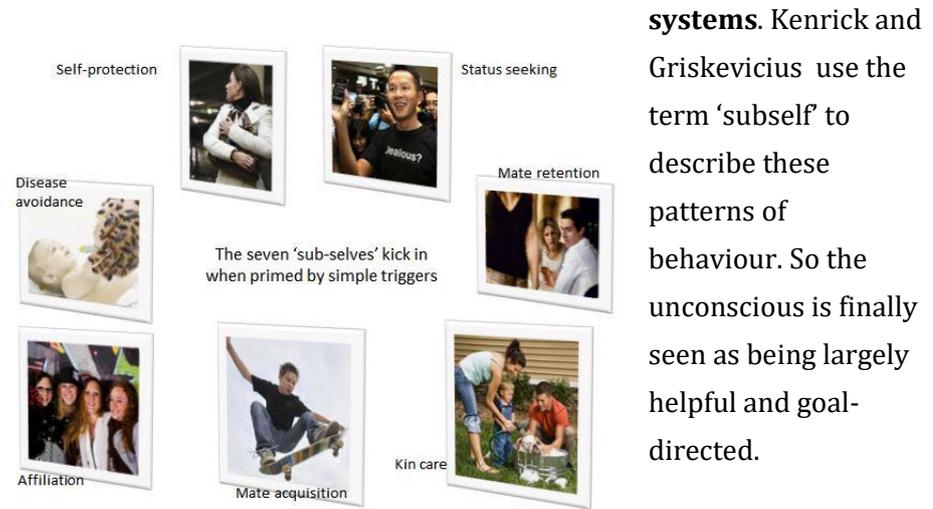
He argued that the adaptive unconscious is an evolutionary adaptation used to navigate the world, using limited attention. This is why we are able to drive a car, type on a computer or walk without having to think about it. These processes not only manage the background details of our lives – using language, implicit learning and so on, but also play a role in important life decisions. Wilson uses psychological research to show that the unconscious can solve problems, create narratives and predict emotional reactions.

11. Unconscious behaviour guidance systems

The concept of the adaptive unconscious is taken a step further by Kenrick and Griskevicius in *The Rational Animal*. They take an evolutionary perspective.

Those who are best at the goals of avoiding harm and disease, getting friends and status, attracting and keeping a mate, and caring for their

family are those who have survived. So we have built in unconscious systems and strategies for triggering appropriate behaviour for each evolutionary challenge: **adaptive unconscious behaviour guidance**



systems. Kenrick and Griskevicius use the term 'subself' to describe these patterns of behaviour. So the unconscious is finally seen as being largely helpful and goal-directed.

- The **self-protection** subself can be primed by real or imagined threats, even thoughts about other races or religions. It increases vigilance, avoids perceived weakness and motivates people to blend in or seek the protection of power.
- The **disease avoidance** subself works with the immune system and apart from the obvious reactions to signs of disease it creates prejudice against the unknown and exotic.
- The **affiliation** subself leads people to build their relationships with others by connecting with them and buying the 'right' products.
- Animals that have higher **status** get better access to mates and resources, and so the status-seeking subself aims to impress, gain respect, and tends towards a myopic optimism.
- The **mate acquisition** subself seeks to show its value as a mate – in the obvious ways, and through music, arts, volunteering etc.
- The **mate retention** subself is sensitive to cues that celebrate or threaten the key relationship and has a number of strategies to manage perceived threats.
- Finally the **kin-care** subself is primed not only by family and children but also vulnerable people and animals. Behaviour includes provision of food, shelter, but also protection and education.

In research, respondents can tell you about the proximate triggers for behaviour – events, environment, thoughts and feelings. But once you have an idea of which subself is operating you can see the longer-term goals; the ultimate triggers, as well as their expression through particular ways of thinking and behaving.

12. Evolution of Systems 1 and 2

Drives and Instincts



Visceral drives: food, shelter, sex, etc.

Triggers for Behavioural Guidance Systems:

Threats → safety

Germs, strangers → disease avoidance

Loneliness → affiliation

Power, disrespect → status

Challenge → mastery

Helplessness → nurturing

Attractiveness → mate seeking

- Visual & auditory symbols
- Emotive images
- Smells – pheromones
- Touch, warmth
- Sound, music
- (High energy) food
- Situational uncertainty
- Scarcity
- Reading faces, body language
- Social situations – fitting in, accepted roles
- Cultural precepts

Ancestral hunter gatherer brain evolved from 160,000 years ago



System 1

Fast, intuitive, impulsive, automatic, spontaneous, instant judgments – uses categories and stereotypes, generalisations

- Built-in biases for error management
- Different judgments when in an emotional state
- Rules of thought (heuristics)
- Sensitive to social and cultural cues, tribal, safety in numbers
- Built-in endocrine system emotions: dopamine, oxytocin, serotonin, endorphins, adrenalin

Neocortex evolved with language (50,000 years) & civilisation (5000 years)

	3200 BCE	3000 BCE	2400 BCE	1000 BCE
sag 'head'				
gin 'to walk'				
su 'hand'				
še 'barley'				

System 2

- Reflective, think about thinking
- Methodical, sequential, controlled, analytical
- Heavy demand on attention and memory
- Self-monitoring function
- Self-control over impulses but ego depletion, limits to willpower

13. The basics of Personal Construct Psychology (PCP) for Kelly grid and laddering

It is not necessary to be aware of the theory behind laddering to be able to use it, but you can use it with greater finesse if you understand the thinking behind it. Personal Construct Psychology was founded by George Kelly, who wanted a way to understand how individuals construe (make meaning of) the world. It is very much an individual-based psychology, as one of the main premises is that we all see the world through our own goggles, the lenses of which are fashioned from previous experiences.

Kelly's theory has been described as "every man his own scientist"; each person notices repeated themes in his life, names and categorises them, and applies these labels to the people and situations he meets. For example, a man might notice that the people he meets with big noses all have a good sense of humour. He is using the constructs 'big nose – small nose' and 'good sense of humour – no sense of humour', and when he meets a new person he will notice their nose and anticipate what kind of sense of humour they will have. (Please note that we cannot assume 'small nose' is the opposite of 'big nose' for this man. It might be 'normal nose' which for him is the critical difference between people.)

We make no value judgements about the validity or logic of these constructs in PCP. We have to accept that it may be odd, but it is his way of looking at the world. It is important to remember this when doing laddering or Kelly grids.

PCP talks about each person having developed a **construct system**, a very extensive and complex network of inter-relating constructs. To be able to manage the constructs, we have hierarchical systems. Construct hierarchies have a pyramidal structure, with lots of detail at the bottom, and as you go up, the levels become more general and inclusive – and generally more important to the person's sense of identity.

The process called laddering is essentially going up the pyramid, from very basic distinctions about the world, to very meaningful distinctions. This is why it is so useful as a research method, and also why it has to be carried out with great sensitivity – because you are dealing with a person's **core constructs**.

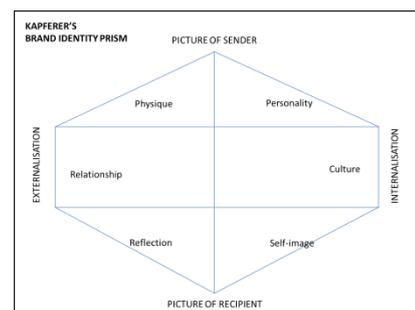
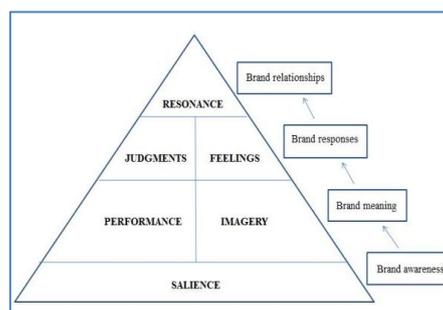
14. Models of how brands work

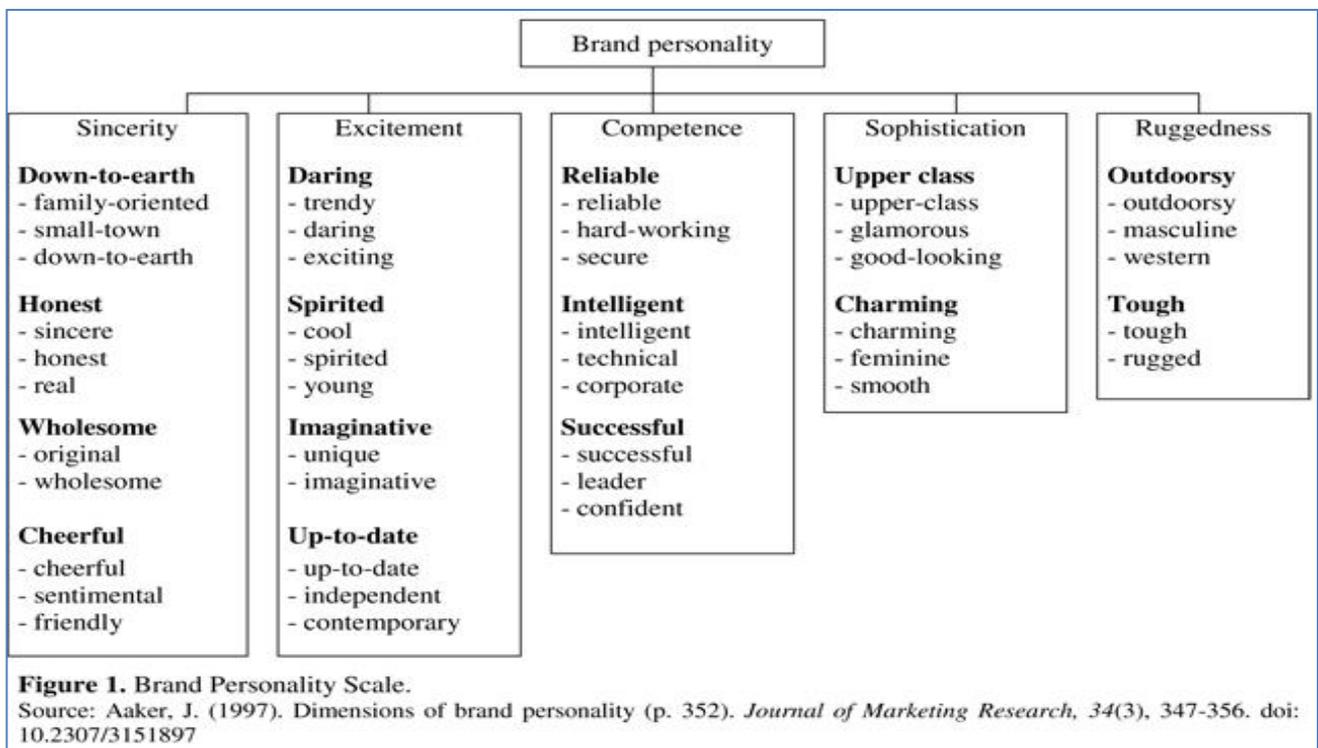
Brand models have been included here briefly because QMR can often be more effective in its recommendations if all the findings from the projectives are linked into an overall theory or model. Too often research picks up some user image, some brand personality, some ideas about core values but these are not integrated. This is a separate and complex subject, so the best advice for researchers working deeply with brands is to assess what implicit or explicit model the client uses and to connect with that. One of the simplest is the brand essence wheel, which combines a number of sources.



The brand essence wheel, developed by David Aaker

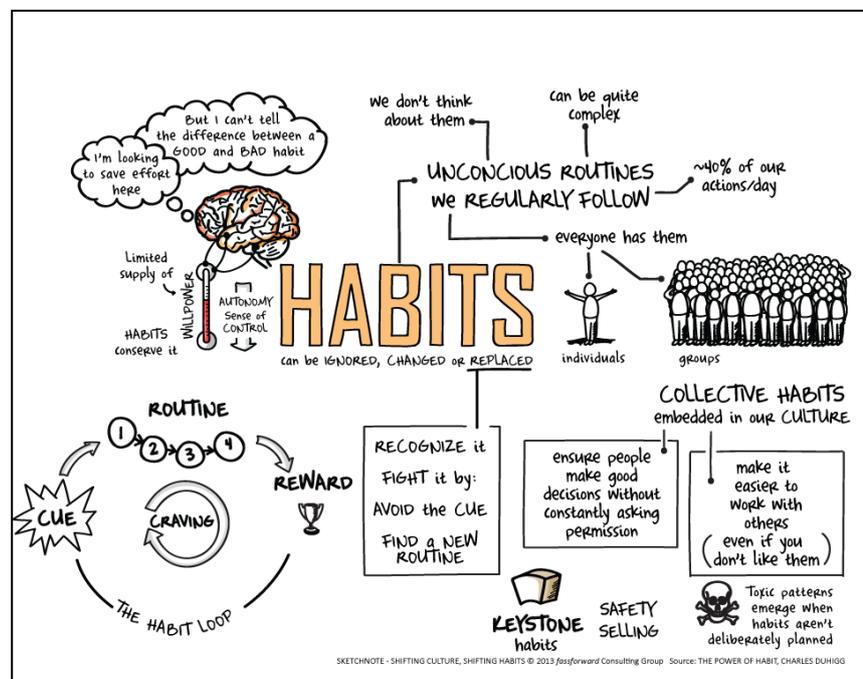
There are also brand diamonds, footprints, pyramids and many other types of model. Below are Kotler's brand resonance model and Kapferer's brand identity prism.





There is also a brand personality model, by Jennifer Aaker. It has been developed further since this illustration.

15. Working with habits



his lovely sketchnote is by [Gavin McMahon](#), created after reading Charles Duhigg's *Power of Habit*. Notice the habit loop in the bottom left, and you will see the importance of noticing the cue that triggers the habit and the routine the habit follows. Habits become automated by the

brain and although we can say “I have a habit of...” we often don’t know exactly what the cues and routines are. If we did we could change our habits much more easily.

When researching habitual behaviour we need close good observation and then some process analysis to understand how the habit loop works.

16. What are heuristics?

In consumer psychology they are the short cuts consumers use to make decisions. Kahneman and Frederick think there may be two stages of processing:

1. The completely unconscious ‘noticing’ stage. In reality, most products have a large number of objective characteristics, as well as an associative network of attributes which make up the brand identity and goodwill. (When researchers start to work on a product they realise how complex it is, and respondents comment “I didn’t realise there was so much to say about a tin of peas!”)

Faced with a large volume of information, individuals select a small part of it on which to base their choice. The purpose of brands and advertising is to provide cues – logos, tag lines, colours, images, recommendations, warm feelings that can provide simple substitutions for the complexity the brand entails. Or the consumer may use the ‘availability’ heuristic – judging by what is more available in memory, and memory is often biased towards vivid, unusual or emotionally charged examples.

2. The second stage may involve comparison between a number of products and is also shaped by the propensities, preferences and desires of the consumer at the time. Some may be ultimate evolutionary goals such as feeling safe, in which case the product that most convincingly conveys a feeling of safety will stand a good chance. Or, there may be a shorter-term need to look cool, in which case the purchaser will process the cultural information they have on what is cool. Or the desire may be more physical: hunger, thirst, tiredness.

There are cognitive influencers such as framing, hierarchies and connections of ideas that affect how we think about something. For example, it is hard to think of tax as a positive construct – even the idea of tax relief contains within it the idea that tax is an affliction.

In addition, there will be strategies consumers have learnt to use successfully in the past. For example, not wasting time getting the optimum possible combination of features for the money, but ‘satisficing’ – finding goods that exceed a certain threshold of satisfaction. On other occasions they may seek to minimise risk, or buy the most expensive to impress somebody.

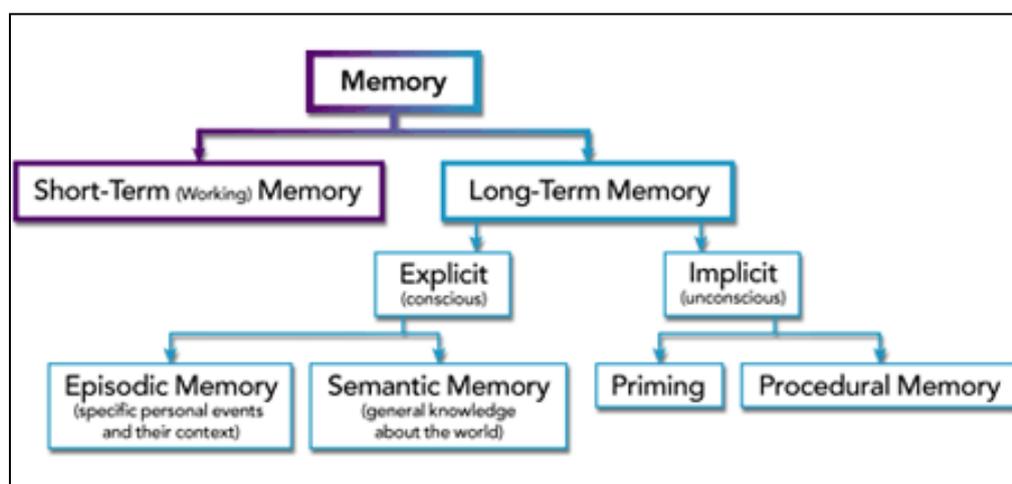
Other heuristics include:

- Price as a surrogate for value
- More or less than a previously anchored price
- Familiarity is linked to trust – the mere exposure effect
- Trusting the experts, authority
- Symbols of functionality – does a face cream with nanospheres work better than one without?
- Feeling uneasy about something, e.g. about genetically modified foods
- Negativity bias – a negative piece of information has more power than a positive one
- Feeling valued because you are offered a concession (bargain)
- Contrast effect – compared with a really expensive item it looks good value
- Sunk costs – you have already invested time/money so you might as well buy it
- Social proof – in uncertain situations we do what most people do
- Admission to a reference group – the product will make you part of an admired group (or an avoidant group so you don’t buy)
- Liking, attractiveness, similarity to ourselves
- Associations with other items or people that have power or value
- Optimism bias – tendency to be over-optimistic about the outcome of something you have planned
- Ambiguity aversion versus cognitive ease – we prefer things that are easy and clear and aim to avoid those with conflicting or incomplete information
- Framing how we think about something, e.g. it’s not a cost, it’s an investment

17. Essentials of memory

There are different types of memory:

- Short-term storage (STS), long enough to dial a phone number, which uses a system called working memory
- Long-term storage (LTS), which involves a separate system and includes further categories of memory:
 - episodic (experiential and biographic)
 - semantic (meanings of words)
 - factual
 - sensory
 - procedural (habits and skills)
 - implicit – the priming effect



Not everything from STS is stored in LTS; storage depends on a number of factors including frequency, emotional intensity and links to other relevant concepts.

Some would add collective memory – archetypal symbols that are very similar for large numbers of people, even though they are outside their own personal experience. This might be seen as being hard wired into the brain as templates or patterns that are activated when the environment presents something that matches that pattern.

The changes in the brain that result from encoding an experience are called engrams – patterns of connections between the various parts of the brain than have encoded the visual, spatial, auditory, verbal components of the memory. Some techniques such as NLP use this idea to help retrieve memories.

Memory effects

Primacy and Recency – the beginning and end of an item are usually better remembered than information in the middle.

The Von Restorff effect – a tendency to remember outstanding elements

The Magic Number 7 (plus or minus 2) – in short-term memory most people can remember about 7 units. However it is 7 chunks of information which are remembered, so more can be remembered by chunking up

Context dependent and state dependent memory – the environment in which the learning takes place provides important associations and parts can become built in to the memory

Remembering is reconstructing

It is believed we use schemata or scripts, which are models of the world based on past experience which can be used as a basis for remembering events. These reduce the amount of information we need to store. For example, we might have a 'Friday night at the curry house' schema, which is our general knowledge of what usually happens, and all we would need to remember was what was different about each occasion.

The way we perceive and think about an event plays a major part in determining the cues that will later help us reconstruct the memory of that event. If you have visited a hotel as part of a working conference, the hotel may not easily come to mind when you are trying to think of a relaxing leisure venue. On the other hand, the more accurate the cues you are given, the more easily you can retrieve a memory, which is why meeting old friends often leads to reminiscences of long-forgotten episodes. So if in research we are aiming to produce accurate recall, we need to provide as many relevant cues as possible.

The danger of schemata is that we **reconstruct** events around them, but we can omit parts, rationalise others, embellish a little, and 'forget' things which are inconsistent with our view of the world. Each time a scheme is used, it is stored again in altered form. They are like Chinese whispers and can get more distorted the more we use them.

Mood congruency is another possible bias. When we are happy we tend to remember the more positive things, when depressed we

remember the negatives. Indeed there is evidence that people 'rewrite' (the emotional flavour of) entire sections of their lives according to what has happened subsequently. (By and large though it is believed that the general recollections of events in the past are reasonably accurate.)

Misinformation effect

Importantly for researchers, accuracy of recall is also subject to the type of questions asked. In a famous experiment some people watched a film of a car accident. Some were asked how fast the cars were going when they 'hit' each other, others when the cars 'smashed into' each other. The latter group estimated a much higher speed for the cars, and were more likely to say they saw broken glass (there wasn't any). This is the **misinformation effect**, and applies much more to peripheral events than to central events.

However, **confirmation bias** can also occur, where people's memory of an event conforms more to what they would have expected to happen than what actually happened. People also like to neaten up stories when they tell them, and these smoother edges get overlaid on the original memory, so the 'real' incident gets lost.

Memory is also subject to hypnotic suggestion, which is the likely cause of false memories, as found in therapy clients who 'remember' being abused as children. On a lesser level **memory distortions** can be implanted by mind-set and implication (e.g. people who read a list of words which relate to sweet things are likely to be more convinced that the word 'sweet' was also on the list when it wasn't).

Ways of remembering

If you are familiar with NLP, you may know that when you retrieve a memory to work with, you can be either *associated* (you are seeing the memory through your own eyes) or you can be *disassociated* (you see yourself in the memory from the outside, as an observer). Freud originally noticed that when his patients reported childhood memories, they were often from the observer position, which to him was strong evidence of the reconstructive nature of memories, since the original memory would have been formed from the associated perspective.

More significantly, an associated perspective is more likely to bring up an emotional component to the memory. Respondents need to be asked: "How are you seeing this memory? Are you seeing it through your own eyes, or can you see yourself in it?" They can be encouraged to associate themselves into the memory. The observer effect also has its uses. Indeed, NLP uses the disassociated perspective to help cure phobias, by keeping people at a distance from their fears.

Books for further reading

Aaker, David, 2012, **Building Strong Brands**

Aaker shows how to consider emotional and self-expressive benefits and introduces the brand-as-person, brand-as-organisation, and brand-as-symbol perspectives. He shows how to manage the 'brand system' to achieve clarity and synergy, to adapt to a changing environment, and to leverage brand assets into new markets and products.

Ariely, Dan, 2009, **Predictably Irrational – The Hidden Forces that Shape Our Decisions**

"Dan Ariely is a genius at understanding human behaviour: no economist does a better job of uncovering and explaining the hidden reasons for the weird ways we act, in the marketplace and out." – James Surowiecki, author of *The Wisdom of Crowds*

Bargh, J.A. and Morsella, E. 2008. [The Unconscious Mind](#)

A short summary of the development of the concept of the unconscious

Bystedt, Jean, Lynn, Siri and Potts, Deborah, 2010, **Moderating to the Max – a full tilt guide to Creative, Insightful Focus Groups and Depth Interviews**

A detailed, lively and fun guide to a variety of moderating tools and techniques. Does what it says on the tin.

Duhigg, Charles, 2012, **The Power of Habit - Why we do what we do and how to change**

"This is a first-rate book – based on an impressive mass of research, written in a lively style and providing just the right balance of intellectual seriousness with practical advice on how to break our bad habits." (The Economist).

Franzen, Giep & Bouwman, Margaret, 2001, **The Mental World of Brands: Mind, Memory and Brand Success**

Part One is about perception, learning, memory and recollection. Part Two describes the brand-related information that is stored in memory. It examines brand awareness, brand meanings, brand emotions, positioning, brand attitudes and brand relationships. Part Three is a practical overview of research techniques and how these can be applied specifically to brand representations.

Gray, Dave, Brown, Sunni and Macanuso, James, 2010, **Gamestorming: A Playbook for Innovators, Rulebreakers, and Changemakers**

Idea generation, visual thinking, problem solving, role playing for customers and users, and many other tools. This book is more for workshops.

Hofstadter, Douglas and Sander, Emmanuel, 2013, **Surfaces and Essences: Analogy as the Fuel and Fire of Thinking**

They argue that analogy-making pervades our thought at all levels –it guides how we speak, frames situations, helps us problem solve and of course gives rise to great acts of imagination.

Kahneman, Daniel, 2011, **Thinking Fast and Slow**

“Rich, profound, a masterpiece. There may be no other person on the planet who better understands how and why we make the choices we make.” (Steven D Levitt).

Keegan, Sheila, 2009, **Qualitative Research: Good Decision Making Through Understanding People, Cultures and Markets**

Looks at the different theoretical models; explores the strengths and weaknesses of qual for different business problems, and examines how to define and apply the outcomes.

Kenrick, Douglas, Griskevicius, Vladas, 2013, **The Rational Animal: How Evolution Made Us Smarter Than We Think**

"Do you want to understand all kinds of human judgment errors that seemed inexplicable before? And do you want to be able to profit handsomely from that new and deep form of understanding? Then don't miss the profound insights of this ground-breaking book." – Robert B. Cialdini, author of *Influence: The Psychology of Persuasion*

Lakoff, George and Johnson, Mark, 2008, **Metaphors We Live by**

Because such metaphors structure our most basic understandings of our experience, they are ‘metaphors we live by’—metaphors that can shape our perceptions and actions without our ever noticing them.

Lewis, David, **Impulse – why we do what we do without knowing why we do it.**

David Lewis is director of Mindlab International and provides a useful review of experiments that show many aspects of impulsive behaviour and how these relate to what he calls the 'zombie brain' (System1).

Mark, Margaret and Pearson, Carol, **The Hero and the Outlaw - Building extraordinary brands through the power of Archetypes**

Using examples from advertising and marketing and consumer, popular, and organisational culture, Pearson and Mark show that successful brands draw on responses to such archetypes as the hero, outlaw, lover, sage, and that these responses cross lifestyle and cultural boundaries.

Saad, Gad, 2011, **The Consuming Instinct – What juicy burgers, Ferraris, pornography and gift giving reveal about human nature.**

Full-on application of evolutionary psychology to marketing.

Seivert, Sharon, 1998, **Working from Your Core - Personal and Corporate Wisdom in a World of Change**

Sharon describes the 10 core archetypes and how they work within individuals, organisations and cultures.

Tallis, Frank (2002) **Hidden Minds, a History of the Unconscious**

A very readable exposition of thinking about the unconscious from philosophy, psychoanalysis and cognitive psychology. It does not cover the latest developments,

Tavris, Carol and Aronson, Elliot, 2008, **Mistakes Were Made (But Not by Me) How we justify foolish beliefs, bad decisions and hurtful acts**

"Tavris and Aronson explain how politicians, pundits, doctors, lawyers, psychotherapists – oh yes, and the rest of us – come to believe we are right and reasonable...and why we maintain that dangerous self-deception in the face of glaring evidence to the contrary." Daniel Gilbert.

"Please somebody, get a copy of this book to the President and his cabinet right away." Michael Shermer, Scientific American.

Thaler, Richard and Sunstein, Cass, 2009, **Nudge: Improving Decisions about Health, Wealth and Happiness.**

They examine choice architecture and how to design default options involving the path of least resistance; how to expect people to make errors; how to improve their performance by giving feedback; how to structure complex choices and how to incentivise people.

Wilson, Timothy, 2009, **Strangers to Ourselves, Discovering the Adaptive Unconscious**

"This book describes an unconscious that is capable of a much higher degree of "thinking" than previously supposed by adherents of either Freudian or Behaviourist branches of psychology. Capable of everything from problem solving and narrative construction to emotional reaction and prediction, the adaptive unconscious is a powerful and pervasive element of our whole personalities. Indeed, it may be the primary element of our personalities, controlling our real motivations, judgments, and actions...A fascinating read". -- David Valencia

Zaltman, Gerald and Zaltman, Lindsay, 2008, **Marketing Metaphoria: What Deep Metaphors Reveal about the Minds of Consumers**

This book addresses the deep metaphors or unconscious frames people use that influence their thinking and behaviour. According to the Zaltmans' research, including "twelve thousand in-depth interviews for more than a hundred clients in over thirty countries", there are seven deep metaphors: balance, journey, transformation/change, container, connection, resource, and control.