

Using Frameworks, theories and models for thinking

Theories, models and conceptual frameworks[[1]](#footnote-1) are essential for research, because they describe, explain, and predict.

They enable the researcher **to name and frame the problem** in terms of concepts and identify the issues – which are often about the relationships between the concepts. They will often

* shape research design and provide a justification for it– sampling and methods chosen
* Influence the questions asked/observations made, according to the concepts that have been identified as most important to understand
* Act as a framework for the analysis and possibly form the basis of the explanation and recommendations

In QMR there is a wide range of these about how society, people, brands, organisations develop, interact and behave. Unlike academics, we are eclectic and will often mix and match bits of various theories to put together a point of view that informs the research.

Even if you don’t use a formal framework you will be using an informal one; your own set of beliefs and experiences, lay explanations, ideas and prejudices you have picked up about how the world works.

**How to choose one?**

There are various options:

* Use an existing frame; used or implied in previous research. For example, a brand model or marketing approach used by the client or agency
* Pick up on something the client is interested in. Perhaps they have heard about Fast and Slow thinking or ‘neuroscience’, they read an article about anthropology in consumer research. Discuss why they think it might be relevant.
* Choose a frame according to a heuristic – a common one is Levels. Will it be most useful to examine a micro level (within and between individuals), a larger group level (‘tribes’ peer groups, classes) or a macro level (society, trends, archetypes, metaphors, economics)? Or use more than one of these?
* Search books and the academic literature, journals etc. A recent example is the paper on Grounding Consumer Brand Engagement in the IMJR, Vol 57, Issue 4 2015.
* Use a ready-made one that you believe in. Some research organisations have clarified their point of view; sometimes these are framed and sold as proprietary methods. For example

Forbes Consulting has MindSight® <http://www.forbesconsulting.com/mindsight/AboutMS.htm>

TNS Global uses NeedScope™

<http://www.tnsglobal.com/what-we-do/by-expertise/brand-communication/needscope>

Olson Zaltman uses (and licences out) ZMET® <http://olsonzaltman.com/zmet/>

Hall and Partners focus on Behavioural Change <http://behave.hallandpartners.com/about-behave/>

In addition various research agencies position themselves as experts in Customer Experience, semiotics, behavioural economics, Implicit Association and so on.

**What if you can’t choose just one?**

It’s OK, because no situation is simple enough to have just one explanation.

**Social and cultural** norms, reference groups, life stages, aspirations, relevant attitudes and beliefs, stereotypes

**Emotions** Motivations, evolutionary drives, need states, associations, experiences, self-esteem….

**Cognitive** processing Habits and skills, attention, heuristics and biases, brand perceptions and relationships

**Environment**, contextual cues, brand touchpoints, behavioural triggers

Use your understanding of the brief to pick the key elements that will make most difference. You might use your understanding of reference groups and life stages to inform the sampling, need states and touchpoints to design a method that includes ‘in the moment’ capture of these, and then heuristics and biases to analyse the information.

**The Default Philosophical Framework**

Constructivism: Reality is socially constructed

Simplifying enormously, this is a view reality is fundamentally mind-dependent; that people create their own reality by the way they interpret the world. Interpretations are of course mediated by culture, language, social norms and so on, but the same thing can have different meanings in different contexts.



The old HSBC advertising makes the point perfectly.

This is in contrast to Positivism, which underpins quantitative research, assuming that an objective world exists ‘out there’, and it is subject to regularities and laws that the scientific method can uncover.

**Implications of Constructivism**

* Validity lies in getting as close as possible to the worldview of the participants
* Research needs to involve an analysis of what things mean to people and why
* Since researchers also construct the world, it is important they aim for ‘empathic neutrality’ – making their own assumptions and values transparent while being open and non-judgmental.
* Context: physical, social, emotional, cultural – is important because it affects meaning

(A good introduction to the foundations of qualitative research can be found here: [Qualitative Research Practice - A Guide for Social Science Students and Researchers](http://www.sagepub.com/sites/default/files/upm-binaries/58628_Ritchie__Qualitative_Research_Practice.pdf) )

What theories, models and frameworks are there?

A selection is offered below. It is far from comprehensive but shows the range of what is available. In most cases, there are only certain aspects of the theory that are applicable to

**Marketing, advertising (useful for understanding and querying briefs)**

Marketing mix, marketing environment, PESTEL analysis& several others, psychographic/behavioural segmentation, planning cycle, low involvement processing, customer loyalty, channel marketing, value creation, AIDA, DAGMAR etc. Hierarchy of advertising effects. awareness, recall, WOM, etc.

*Note that marketing and advertising theory appears to be only loosely applied by practitioners but does influence their thinking. Paul Feldwick’s book The Anatomy of Humbug is a fascinating review of the “practitioner theories” of how advertising works, including a major focus on Salesmanship (Rational persuasion) and Seduction (non-verbal and emotional).*

**Brands**

Brand architecture, brand equity, brand personality, identity, essence, imagery, positioning, values, brand platform, brand wheel, Aaker model, Keller model, stakeholders, lifecycles, etc.

*Although there is no agreement there is a lot of overlap, which gives flexibility in the parts you can choose to focus on.*

**Consumer psychology**

Functional theory of attitudes, purchase funnel, persuasion, communication theory, decision-making, planned behaviour, Kotler, Howard and Sheth, cognitive dissonance, symbolic consumption, attribution theory, etc.

*Although there are professional organisations and journals devoted to consumer psychology (Association for Consumer Research (ACR) and the Society for Consumer Psychology (SCP) there is criticism even from within that many of the studies are too narrow and theoretical. Nevertheless there are some useful concepts to pick and mix from.*

**Psychology**

* Behaviourism – conditioning, association, rewards and punishments, shaping behaviour
* Habit
* Unconscious/psychodynamics (conflicting elements and needs with the psyche) Projection
* Nonconscious processing, systems 1 and 2, adaptive nonconscious
* Gestalt, need for closure and completion
* Socialisation; psychosocial development, self-esteem
* Life stages (physical, emotional social and psychological development) and transitions
* Emotions – universal evolutionary function, Plutchik theory, emotional intelligence, facial coding
* Theories of motivation; Maslow, approach avoidance, Instincts and drives, Herzberg (employees)
* Cognitive psychology: attention, processing of stimuli, memory, decision-making
* Neurolinguistic Programming
* Transactional analysis
* Organisational psychology
* Family theory
* Models of behaviour change
* Social psychology: group dynamics, social influence, reference groups, mass psychology, collective unconscious, social identity, affiliation

**Behavioural economics**

Heuristics, context, biases, cognitive science, decision-making, shaping behaviour

**Social and Cultural**

Semiotics and cultural analysis, ethnography, anthropology, archetypes, symbols, belief systems, control systems, social structures, traditions, trends, the role of institutions and political systems, etc.

**Notice that many of the theories or models have an implicit rationale about the type of method you should use in order to work with them. For example:**

* If they are about the nonconscious (out of awareness) you may need projectives, implicit association or neuroscience.
* If they are to do with habitual behaviour you will need to track and capture that behaviour
* If they are about decision-making you will ideally want to follow the influences in the process as they happen in a longitudinal format
* If they are about cultural influences you will need to identify and analyse them rather than use an interviewing method.
1. There are technical differences between theories, models and conceptual frameworks but we won’t go into that here. [↑](#footnote-ref-1)