KS&R
Data to Knowledge

Qualitative Research – Projective Techniques

December 2009

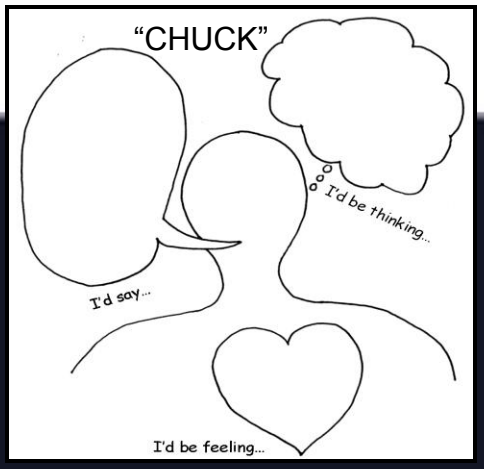
I'd like to introduce you to "Chuck" *(see below*), as he is affectionately known among KS&R's qualitative researchers.

Chuck is an example of a **projective technique**, a psychological tool employed in qualitative research to tap into respondent insights that lie "*beneath the surface*".

As market researchers, we are frequently asked to investigate what customers buy, and why they buy; how they interact with products/services, and the companies that provide them; and how they feel about those products, services and brands—and the purchasing experience.

At KS&R, we employ a variety of projective techniques to help our clients get the answers to these questions.

Projective techniques -- originally known as *motivation research* -- have their roots in the first half of the 20th century, partially in response to the U.S government's need to select military personnel during World War II. Psychologists worked to create techniques that would reveal unobservable, covert aspects of personality.

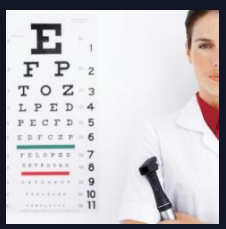


So why bother with projective techniques? Why not just ask customers what they think? The answers respondents give sound believable and convincing, particularly B2B respondents who tend to make conscious, deliberate decisions. If you ask an Optometrist why she/he prescribes a certain contact lens, she can tell you. She will clearly articulate the exceptional vision, comfort and health the lens provides. But she is not going to be anxious to say that inertia or free samples are the primary reasons she prescribes the lens, or that she worries about losing patients if she doesn't offer the contact lenses they are used to.

Many times respondents are not even aware of the reasons for their own behavior. The mobile device category is a good example. People don't buy cell phones just for the rational reasons they state. There are significant emotional drivers/benefits at play which are largely unconscious. An iPhone owner is not likely to say straight out that taking the device out of his pocket and placing it on a conference room table or in a bar makes him feel socially acceptable and hip.

And in many Asian cultures where people tend to refrain from voicing their opinions directly, direct questioning will often result in pleasant, pro forma responses.

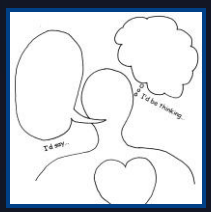
Projective techniques work because they get respondents to speak about something indirectly by "projecting" their thoughts and ideas, by talking about other people, or objects or situations. They help respondents go beyond their rationale perceptions and opinions to explore their underlying thoughts and behaviors, revealing more deeply held motivators and values -- and to articulate and express these points-of-view more fully.

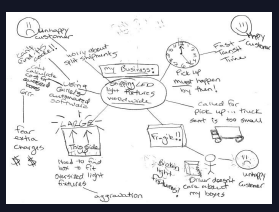


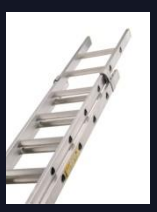

What does this mean for us as researchers? A much better understanding of how human needs and emotional values connect to products, services, features, brands. And, as a result, much more consistency between research findings and actual behavior.

There are various types of projective techniques: completion; association, selection/arrangement, expression, and construction. It is important to choose the right technique to fit the research problem at hand.

In this primer, we offer a look at some KS&R case studies involving common research needs, and the projective techniques you can use to address these issues more effectively.








Case Study: Product/Service Positioning and Messaging

Projective Technique: The Open Template

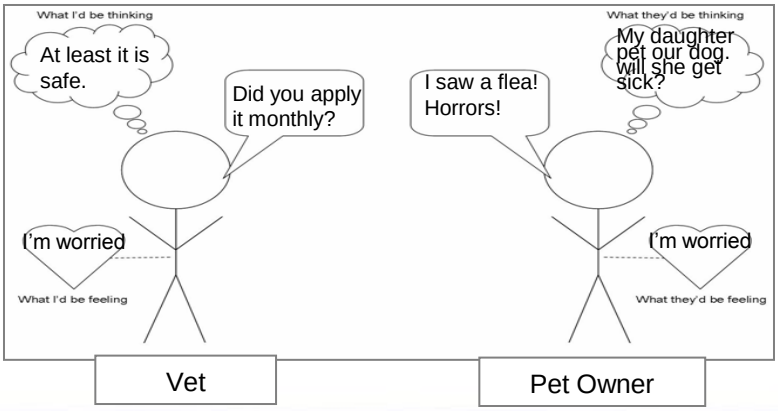
Type: Completion

Situation: A veterinary pharmaceutical manufacturer had developed the next-generation of a topical parasiticide with exceptional efficacy, and was looking to understand how best to position it in the marketplace.

Methodology: KS&R conducted focus group research with veterinarians. Each respondent received a blank "Open Template" and was asked to fill in the template with what he/she is *thinking, saying*, and *feeling* about the product category.

Through discussion and analysis of the completed Templates, it was revealed that veterinarians want to be secure in the knowledge that they are doing the best for their patients – both pets and their owners – in keeping pets' flea/tick free to prevent discomfort, illness and disease.

Outcome: The manufacturer successfully leveraged the emotional aspects of the veterinarians' professional and personal sense of responsibility for the family's well-being in marketing the parasiticide.



Case Study: Service/Product Development/Optimization

Projective Technique: Mind Mapping

Type: Expression

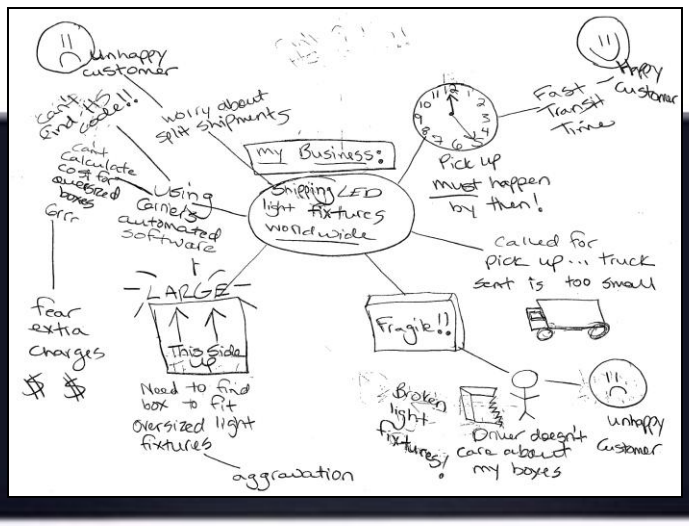
Situation: A global transportation services provider looked to KS&R to help them better understand customers' shipping needs and challenges in order to optimize their portfolio of services.

Methodology: KS&R employed "mind mapping", a projective technique designed to elicit both broad and deep associations, during focus groups with customers. Mind mapping is a "whole brain" technique as it gets at the rational left brain and emotional right brain. Also important to this research, mind mapping identifies not only primary needs, but also second- and third-order needs associated with a particular product/service category.

Each respondent wrote down the discussion topic in a circle in the center of a blank sheet of paper (*e.g,, "shipping LED light fixtures worldwide*"). Respondents then had a few minutes during which they wrote down everything they could think of, working out from the center and creating "branches" or "chains" of thoughts and feelings. Respondents were encouraged to take each branch as far as they could. When completed, the respondents circled the branch of most significance to them.

Respondents shared and discussed their mind maps with the group, making additional connections and associations.

Outcome: The completed mind maps brought to light that customers are generally satisfied with the service provider's existing portfolio of services. Analysis of the mind maps also uncovered frustrations, pain points and unmet wants and needs with regard to the service provider's automated solutions -- a real opportunity for the client to build and maintain market share.



Case Study: Corporate Logo Development

Projective Technique: Picture Deck

Type: Association

Situation: A global telecommunication services provider was preparing to launch a "brand refresh" initiative, including introducing a new corporate logo.

They looked to KS&R to select a logo from among many design concepts that would be most effective in communicating the company's brand attributes.

Methodology: Testing logos presents unique challenges for which projective techniques are uniquely suited.

For this research, KS&R employed one of its proprietary Picture Decks that contains a carefully selected assortment of architectural images.

Each respondent received a 3-ring binder containing an assortment of photos that represent a wide variety of images. Each photo is coded with a non-evaluative letter for easy reference. Each respondent reviewed all photos and selected the one that he/she most associated with the brand being researched.

Individually and in turn, respondents described the photos they selected, and reason for selection, including positive and negative connotations. The moderator prompted and probed to encourage additional connections.

Outcome: Significant consensus emerged among respondents with regard to the design concept that best communicated the look and feel of the "refreshed" brand. The new logo features an eye-catching, crisp, bold, clean, design that says "innovation" and "state-of-the-art technology", while still evoking images of the company's important legacy factor".

Case Study: New Concept Ideation /Value Proposition Development

Projective Technique: Laddering

Type: Construction

Situation: A national retailer was in the process of developing a customer rewards program and turned to KS&R to ensure that the program "connected" with customers.

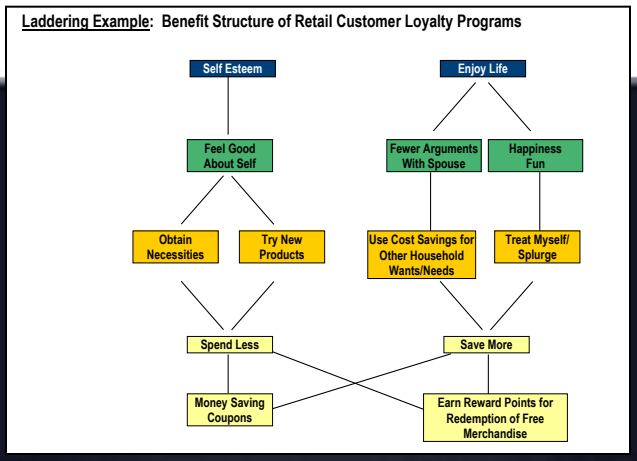
Methodology: KS&R conducted In-depth Interviews (*IdIs*) with target market shoppers, employing the projective technique of "Laddering". Laddering is a systematic exploration of the links that exist between the attributes of a product/service, and the meanings, associations, and feelings they impart – the functional and emotional benefits.

Laddering is particularly useful in unearthing unmet wants and needs, and finding fertile opportunities –"white space" -- within a product/service category. And since laddering identifies the benefits derived from a particular product/service, it is a also very effective in value proposition development.

In the IDIs, the basic structure of the ladder – the functional attributes that derive certain types of customer benefits and value was identified. Shoppers were asked to describe the features that are important to them in a customer rewards program. This was followed by questioning to uncover the consequences of the identified attributes: "Why is this important to you?" "What does it mean to you that the program has this attribute?" In Laddering, the questioning continually leads respondents to a higher level as it forces them to think about the reasons for their attribute preferences.

During analysis, the ladders generated in the IDIs were aggregated to create one overall benefit structure.

Outcome: The research identified the specific features of a customer rewards program – including reward value, earning rates, special offers, and account servicing -- that would truly engage the retailer's customers. The resulting rewards program was successful in increasing store traffic, lifting customer spending, and increasing the number/types of product categories shopped.



Case Study: Value Proposition Development/Testing

Projective Technique: Grouping

Type: Assembling

Situation: A global manufacturer of mobile devices engages KS&R to help identify a winning value proposition for a new mobile device potentially targeted to "prosumer" customers.

Methodology: KS&R conducted IDIs and focus groups worldwide, utilizing the projective technique of "Grouping" to determine the key dimensions/attributes that customers think about for this product category, and how they categorize different brands/models of mobile devices according to these dimensions.

For this exercise, several mobile devices, including the client's prototype, were placed in the center of the focus group table. In an open-ended format, respondents were instructed to "put together what goes together" – to sort the devices into groups that made sense to them. (*The moderator did not suggest relevant attributes; the attributes were identified by respondents in their own language*). Respondents were also instructed to talk aloud as the group worked together to reach consensus.

The respondents grouped the devices multiple times on dimensions ranging from ease of use (*intuitive/difficult*); size (*large/small*); appearance (*most/least professional);* capabilities (*feature rich/basic*); and durability (*rugged/flimsy*).

Prompting and probing explored respondents' reasoning behind their perceptions, as well as how the prototype device stacked up in the marketplace.

Outcome: Customers' positive reaction to the prototype device validated the prosumer customer value proposition, and identified the key features/attributes driving customers' interest.

The research also helped the manufacturer to identify, and successfully address, several style/design elements of the prototype device that had caused concern for customers and would potentially limit their interest in the device.

Most Conveys Professional Image

Least Conveys Professional Image

A few final thoughts…

- Don't be afraid of projective techniques! Use them, adapt them, enhance them…employ *your* creative muscle!
- When using projective techniques, screen for creative respondents, to the extent possible. Respondents who have a good imagination, are spontaneous, and willing to take a few risks and to have fun will engage much more quickly and effectively.
- It is very important to create a research environment in which the respondents feel comfortable and free to speak their minds. Many of these techniques require respondents to step out of their "comfort zone".
- Projective techniques that utilize stimuli (*e.g., Picture Deck, Grouping)* are easier for respondents to do than more abstract techniques (*e.g., Laddering*). Keep this in mind when you are deciding when to use a technique, and with whom**.**