

## The Future of Qualitative Research: Philly Desai, Turnstone

### 1. Introduction

The research world is changing fast and we are under threat from all sides – at least, according to several recent articles in Research Magazine. Management consultants and direct marketing agencies are muscling in on traditional research ground. Consolidation, mergers and acquisitions are constant features of the industry. We are subjected to reminders about the poor public image of market research and the difficulties of getting “into the boardroom”. And eminent practitioners such as David Smith and Clive Nancarrow warn that if we don’t radically change the way we work, market researchers risk becoming marginalized from serious business decision making.

Qualitative research is not immune from this self criticism. Even gurus such as Wendy Gordon and Roy Langmaid, both now standing to one side of the industry, criticise us for churning out the same tired old methods. So, are we really in such a poor state? Or are suffering from a collective neurosis, and failing to see how well positioned we are to take advantage of recent changes in business and social policy? Judith Wardle, Joint Managing Director of qualitative agency Wardle McLean, suggests things are not nearly as bad as some might think. “Judging by the quality of people entering the business, the mainstreaming of qualitative research in client companies, and its spread to an ever increasing range of organisations, it is a success story.”

So, why all this soul searching and self flagellation? Although it’s too early to write the obituary of the “focus group”, there are certainly important changes in the business context which mean qualitative research needs to expand its toolkit. Firstly, markets change very quickly now. Global media allows brands, imagery and aspirations to travel the world almost instantaneously, and the pace of technological change shows no signs of slowing. So qual needs to develop a more direct line between the consumer and the client. Linked to this, many companies now place innovation at the heart of their business, believing that a failure to produce regular new products will result in the fickle consumer going somewhere else. Thus, they want research agencies to help them come up with new ideas, not just evaluate the old ones. Consumers don’t buy one product or brand now, but rather a range of brands depending on their moods – New World Wines for dinner parties, Budweiser for the pub, Bacardi Breezer for night clubs. Qualitative research needs to get nearer to these different contexts of consumption to understand these needs. And finally, there are significant legislative changes and a new consumerist agenda in the public sector. These mean that central and local government, police forces, health authorities, fire brigades, museums and art galleries all use qualitative research – but conventional commercial methods are not always appropriate for their different needs.

So, whilst Wardle is right that we shouldn’t write off current methods, the changing marketing landscape requires a wider range of approaches from qualitative practitioners. If we can take the lead, qualitative researchers could play a central role in shaping the emerging discipline of Knowledge Management. If we are dragged

kicking and screaming into the future, we may find the brand strategists, design agencies and management consultants have already got their towels on the best deck chairs.

There are six major trends which, I believe, will influence the future of qualitative research. The six trends are:

- From talk to action;
- From reporting to experiencing;
- From the past to the future;
- From understanding to innovation;
- From respondents to partners;
- From interviews to eclecticism.

## **2. From talk to actions**

Researchers will have to pay more attention to what people actually do, rather than what they say they do. We'll need to research products at the places and times where they are actually used, not ask people to reconstruct their memory of it weeks later. The need to understand what actually happens at the Point of Sale – the moment of truth – will force us out of the viewing facility and back into the real world. As Siamack Salari of Everyday Lives comments, "Instead of focusing on an activity like it's a discrete event, it's being able to put it into an overall picture, to see how it fits in. It puts it into context and it totally changes the way that you think about your product." This means more use of observational and ethnographic methods – exploring consumer behaviour where it actually happens. If we're researching shoes, let's look under the bed; if it's toothpaste, get in the bathroom!

## **3. From reporting to experiencing**

The importance of direct experience of the consumer has been recognised by a wide range of manufacturers and retailers. Companies like Unilever Bestfoods, Asda, Kraft Foods and Microsoft have programmes to allow their personnel direct consumer contact, rather than relying on researchers as intermediaries. As Bill Parton, Research Manager of Kraft Foods comments, conventional research can sometimes distance the marketer from the target audience, but direct contact overcomes this. "Your average marketer is a long way off your target group. So, it's all about empathy and liking, understanding your consumers in the round and understanding the context in which you're operating." Thus, qualitative researchers will increasingly be facilitators of contact with the consumer, rather than messengers from the frontline. But this means researchers will need to advise clients on how to understand what they're hearing and seeing, and help them integrate these insights into their daily work. It also means clients will need to be careful that biases don't enter into the system, with marketing people or brand managers justifying their own decisions. The desire to get "closer to the consumer" also implies different presentation methods. Purely verbal debriefs may give way to video based presentation and reporting, role play workshops, or even bringing respondents directly into the debrief to explain their feelings and motivations.

#### **4. From the past to the future**

Understanding the past was never enough, but the fast pace of change means that researchers are increasingly asked to focus on future possibilities for brands, products or advertising. Our clients will want our opinion on what might happen, not what has already happened, in their markets. We'll be asked to help plan future scenarios, spot possible trends, and advise on where opportunities may lie. This means moving away from working with mainstream consumers towards the so-called "leading edge" – the consumer who, according to Kirsty Fuller and Maggie Collier of Flamingo, "represents the consumer of the future". It means widening our field of vision to include popular culture, and it also means living with a greater degree of uncertainty than we, as researchers, are used to – there are no certainties in the future, only educated guesses. Indeed, it's not at all clear that these activities are research at all – they are a form of research based consultancy which require a far greater degree of trust in the judgement of the individual researcher, rather than their technical research skills.

#### **5. From understanding to innovation**

Qualitative researchers are increasingly being asked to generate, rather than evaluate, new ideas. These may be product innovations, brand extensions, service developments or advertising routes. In these projects, although researchers use qualitative skills – managing group dynamics and interactions, analysing meanings, and building new ideas through dialogue with consumers – they are not doing research. The desired outcome is not a rigorous understanding of the market, but rather an exciting new idea or solution to a problem. This may mean conducting several groups in quick succession to refine an idea, with the creative people present to make on the spot changes. Stephen Donaldson, Group Insight Manager at Unilever Bestfoods, emphasises the importance of separating the process of creation from that of evaluation – processes which qualitative research has often confused: "You may stagger groups on Monday, Wednesday, Friday. And then allow yourself to build your ideas and change the stimulus materials. Then you play around with different things to see if you can unlock what the problem is." But we need to change the way we do groups if we want new ideas to come out – bringing together contrasting points of view, adopting a more dynamic facilitation style, using more diverse stimuli, and focusing on tasks rather than discussion. As Greg Rowland from Semiotics for Brands points out "It's very difficult to ask consumers to imagine things that aren't there, like with projects which ask, 'where should the brand go next?' If qualitative research hasn't quite uncovered things, that's because qualitative research has become very stretched in the last few years." The old methods won't deliver new insights, because they weren't designed for that.

#### **6. From respondents to partners**

These shifts in what clients want also require a different relationship with the respondent. No longer will the norm be passive "respondents", kept in the dark about the marketing objectives and waiting for the next question. This is particularly important in public sector research, where the issues involved are often complex and difficult to grasp – prioritising council budgets or health care, or exploring how best to dispose of nuclear waste – and informed reactions are of limited value. If researchers want a meaningful response they need to tell respondents the facts, and

give them time to come to an informed opinion. As Robin Clarke, head of the Public Involvement Programme at the Institute for Public Policy Research, points out, “local authorities want something that is useful, that can add to policy. You don’t want something that just says, ‘well, the public don’t know anything about that.’ ”

This may mean using methods such as Citizen’s Juries, where a diverse group of people are brought together for several days, provided with information and access to expert opinion, and given time to form a view once they feel they understand the issues. Also, public sector research is often part of a broader consultation process, involving public meetings or local exhibitions with a remit to include everyone and develop a relationship with local people. Thus, researchers will need to be more eclectic, able to interpret the outcomes of a survey, series of group discussions, public meeting and political lobbying, if they are to be really valuable to public sector clients.

## 7. From interviews to eclecticism

Finally, qualitative research will need to use a wider range of data sources and research methods if it is to avoid being marginalized from business decision making. As independent researchers Gill Ereaut and Mike Imms point out, “Interviewing is the default mode in qualitative research, but this has prevented us from using broader methods, techniques and thinking as part of our everyday work.” They recommend a more eclectic approach, sometimes called “bricolage.” If we are to play a central role in providing information and insight, we can’t restrict ourselves to interviews and groups. We need to be able to analyse and interpret consumer culture in all its forms – advertising, packaging, film and television, as well as magazines, music and fashion. This means using analytical frameworks from disciplines such as semiotics, anthropology and sociology, and moving away from our reliance on psychological approaches to the consumer. And, quite radically, it involves a shift away from defining qualitative research on the basis of methods – groups, depths, observations – towards a definition based on analytical skills. The uniqueness of qualitative research in this framework would lie not in how we talk to consumers, but how we make sense of consumer culture. But do we have the skills and knowledge to adopt this approach? Or we merely dabbling in half digested bits of academic theory and giving it a new name? And even if we can adopt a truly rigorous analytical approach, can we explain to our clients how we do it, and make sure we’re not open to accusations of charging a fat fee for watching Eastenders or reading FHM? We can only do this if we develop clear and rigorous analytical frameworks to integrate and make sense of these different sources of data – and who is going to take on that task?

## 8. Conclusions

So, what are the implications of these shifts for qualitative researchers now? What challenges do they present, and how well prepared are we to meet them? To conclude, here are some tentative predictions for the future of qualitative research.

Firstly, relationships between researchers and clients will get much closer. Researchers can only provide the insights which clients want if we know as much about the client as we do about the consumer. In particular, trend spotting and scenario planning need to consider financial, legal and human resources factors which go beyond the research department. But this means clients need to provide

researchers with this information, and with access to the real decision makers in their organisation.

Secondly, the popularity of consumer contact programmes, workshops and other forms of facilitation within client organisations mean that researchers need to feel comfortable with managing directors, finance directors, and sales people, as well as research and marketing personnel. If researchers are uneasy talking “boardroom talk”, then they can’t complain if the door is shut.

Thirdly, researchers will need to extend their facilitation skills beyond the core qualitative methods. Innovation and idea generation can’t be done with non-directive questioning. They need to more task focused, fast moving, energetic and dynamic. And on the other hand, observation requires researchers to resist the urge to constantly question, and to develop the ability to observe behaviour rather than listen to words.

Fourthly, if qualitative research is to be defined by analysis rather than method, researchers need to demonstrate to clients that they have these analytical skills. Most researchers find it hard to explain how they do analysis, but if that’s what they are selling then we’ll need to communicate much better. Cultural analysis needs specific knowledge and training – in semiotics, structural anthropology and consumer theory, for example. However, many researchers don’t have this background or, if they do, would find it hard to explain how they use these approaches. This means developing analytical approaches which can integrate interview data and cultural analysis, which we believe are robust and which we can communicate to clients. Not everyone with a pile of youth magazines and a video camera is a qualitative researcher.

Finally, we need to be clear about what is qualitative research and what is not. Some of the methods discussed use core qualitative skills, but they are not research and are not judged as such. We need to tell clients when they are buying research and when they are getting some other form of qualitative consultancy – facilitation, idea generation, or scenario planning. This would enable us to maintain the distinct identity of qualitative research, but also to use our skills more confidently across a much wider and – possibly more exciting – qualitative landscape.