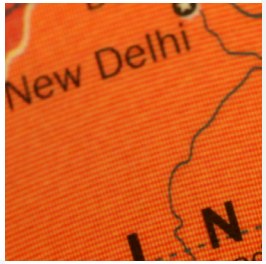
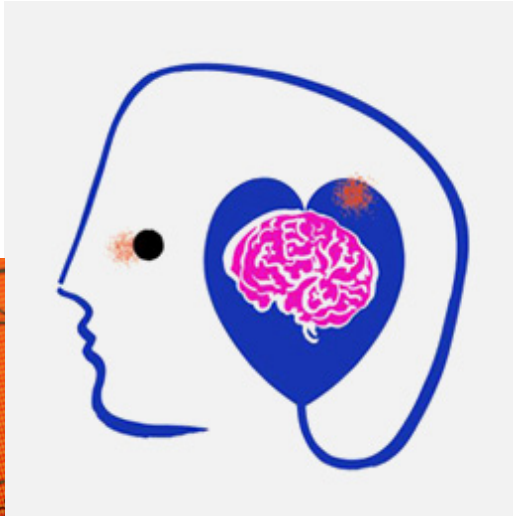
Research excellence

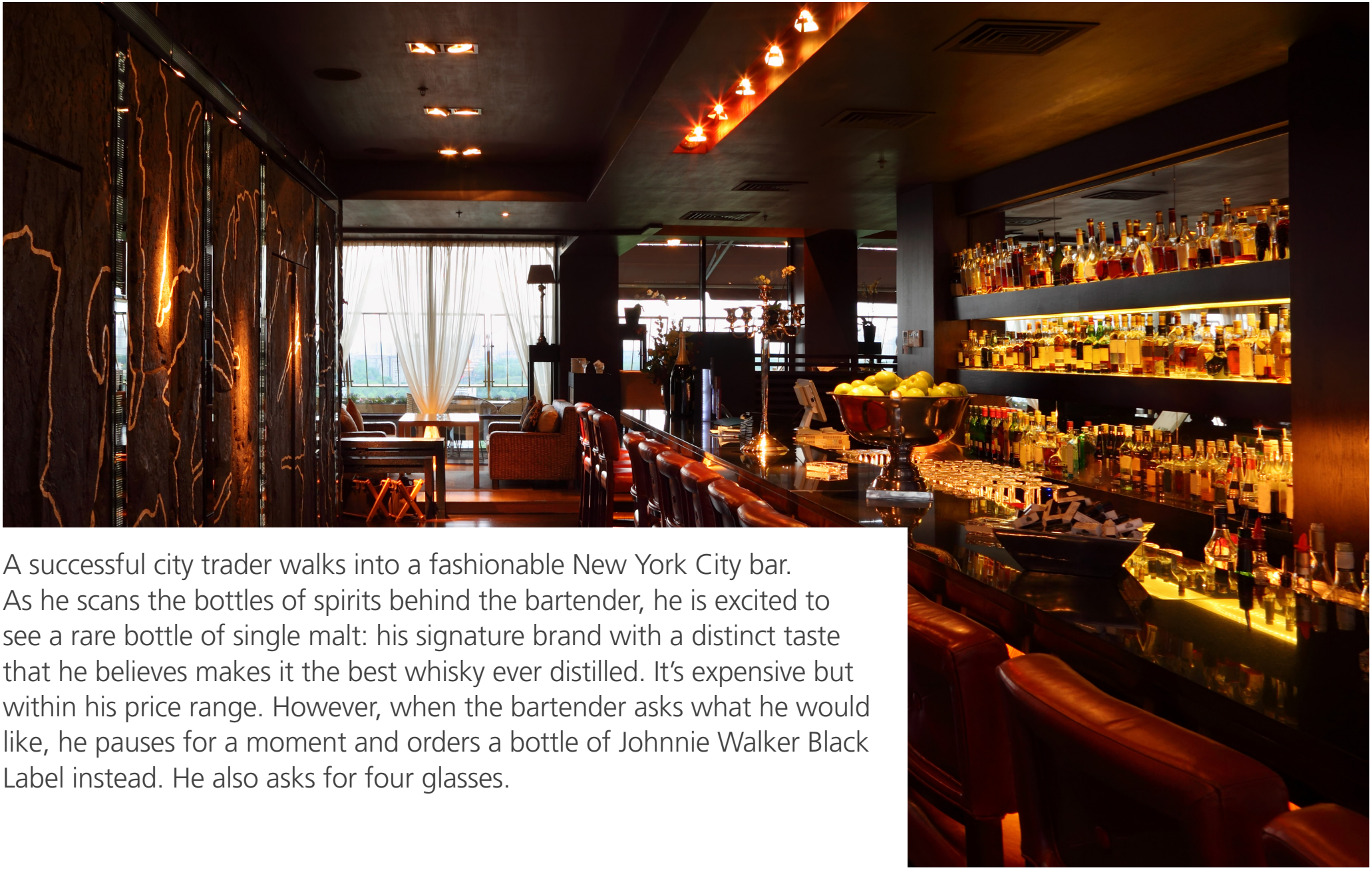
The value of context,
or what qualitative research can learn from behavioural economics



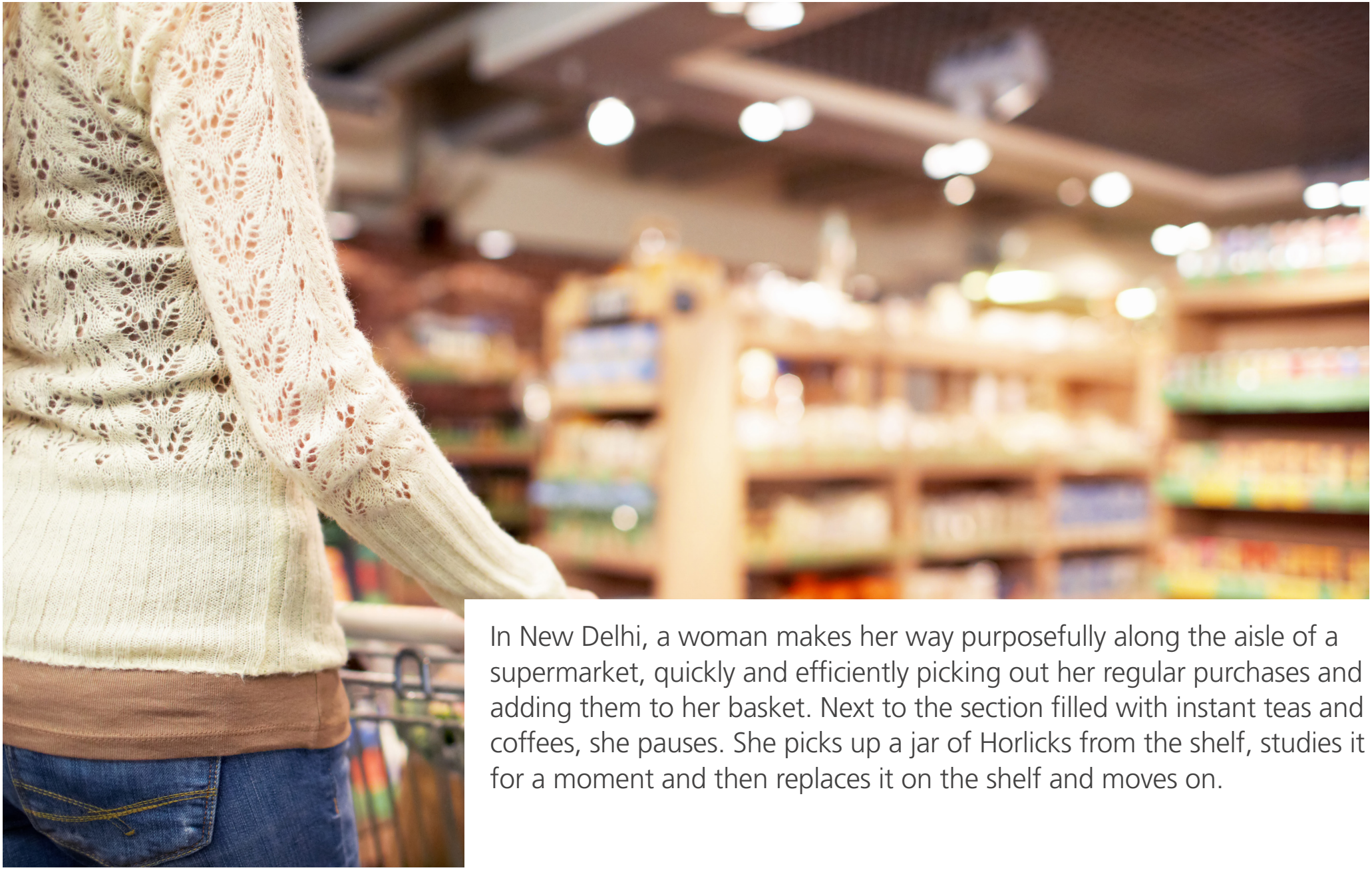


Qualitative research is uniquely positioned to uncover the true drivers of consumer behaviour, but can only do so if it starts to look beyond our articulated wants and needs

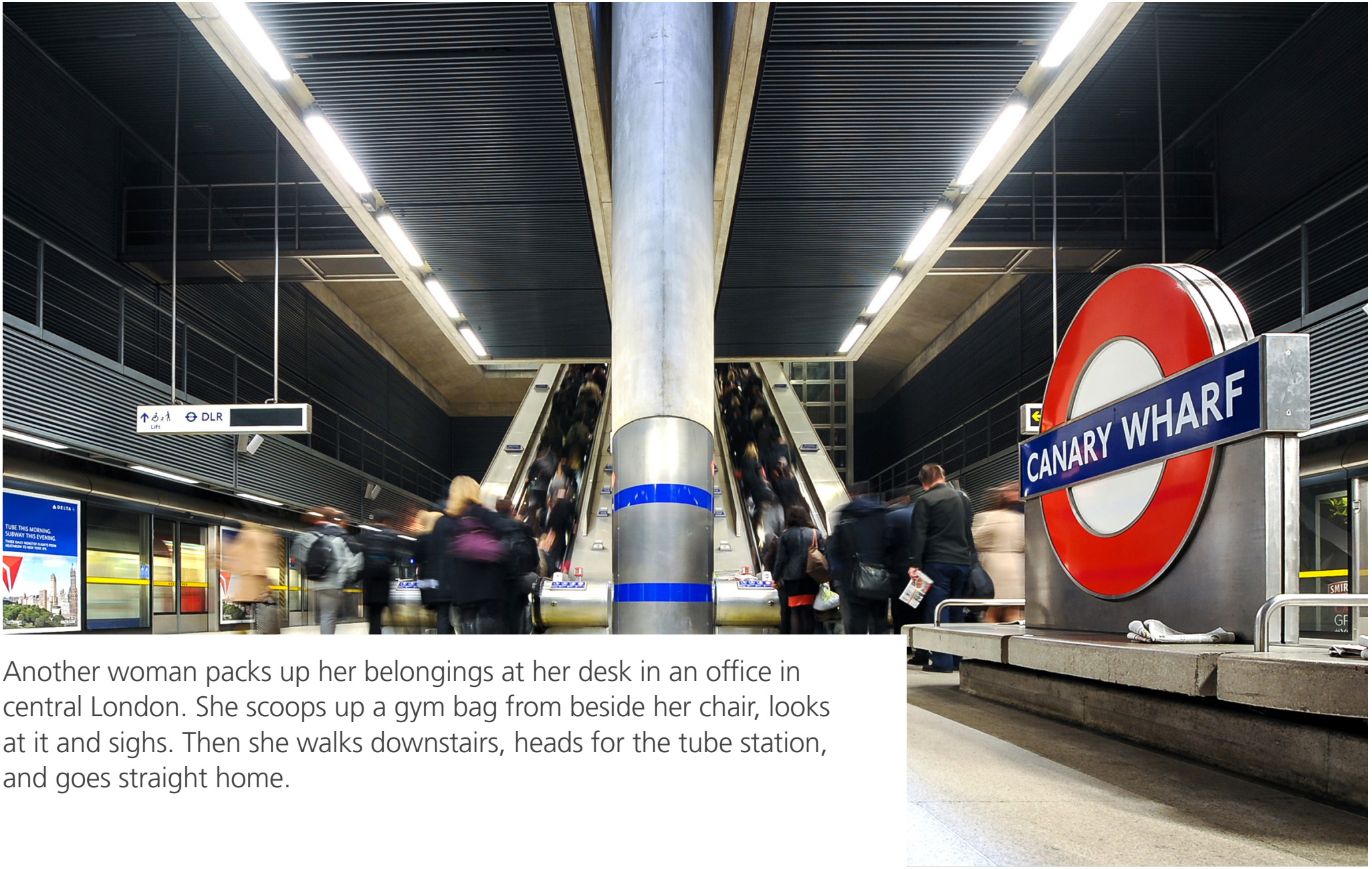
This report is based on an original paper first delivered at ESOMAR and subsequently the winner of the prestigious WPP Research in Practice Atticus Award in 2013.



A successful city trader walks into a fashionable New York City bar. As he scans the bottles of spirits behind the bartender, he is excited to see a rare bottle of single malt: his signature brand with a distinct taste that he believes makes it the best whisky ever distilled. It's expensive but within his price range. However, when the bartender asks what he would like, he pauses for a moment and orders a bottle of Johnnie Walker Black Label instead. He also asks for four glasses.



In New Delhi, a woman makes her way purposefully along the aisle of a supermarket, quickly and efficiently picking out her regular purchases and adding them to her basket. Next to the section filled with instant teas and coffees, she pauses. She picks up a jar of Horlicks from the shelf, studies it for a moment and then replaces it on the shelf and moves on.



Another woman packs up her belongings at her desk in an office in central London. She scoops up a gym bag from beside her chair, looks at it and sighs. Then she walks downstairs, heads for the tube station, and goes straight home.

Situations such as these illustrate an issue with which qualitative researchers are very familiar: the fact that that behavioural intention, such as going to the gym, losing weight and staying healthy, does not always translate into actual behaviour; that strong, personal brand preferences do not always translate into brand choices. Qualitative research offers marketers the greatest opportunity for revealing why such intentions do not produce the behaviour that we might expect. But its ability to deliver the correct explanation depends on where it looks for the answers.

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Tell me what you want, what you really, really want

Most qualitative research today starts from a psychoanalytical view of human behaviour that is derived from Freud and considers that apparently contradictory behaviour results from hidden emotions, wants and needs. Researchers prompt interviewees to think in more detail about why they fail to make the decisions their stated preferences suggest they should, seeking to uncover deeper motivations or beliefs that might explain the behaviour.

In the case of our whisky connoisseur, the deeper belief that emerges might be a conviction that his favourite whisky is best suited to quiet, contemplative evenings at home rather than lively, buzzing nights out. For our would-be gym-goer, the explanation could be that she believes she is not in the best state to visit the gym after long taxing days at work and instead needs to unwind, recharge and visit in the morning. For our supermarket shopper, the subject of a test interview conducted by TNS to demonstrate the results delivered by different approaches to qualitative research, the answer lay in the fact that she used to love Horlicks as a child or a young woman but she is now an adult, and no longer 'needs' the 'fattening' milk that is the main ingredient in a Horlicks drink.

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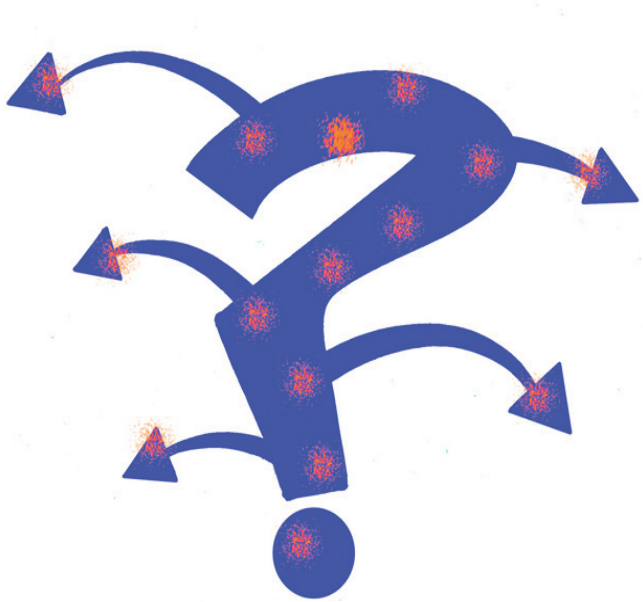
Good answers, incomplete questions

Inviting consumers to consider more deeply the reasons for their actions almost always produces an answer. And if we ask the right questions we are often able to avoid superficial, rationalised responses and touch hidden layers of needs and motivations. The problem, as advances in neuroscience and behavioural economics keep reminding us, is that needs and motivations are at best only half the picture.

There are few more powerful fits with motivations than a gym and the desire that it embodies to be fit, attractive and healthy – but many people still do not go to the gym despite spending a lot of money on their membership. There are other mental forces at work that are not apparent to a needs-based approach and cannot be revealed simply by exploring feelings more deeply. In fact, they rarely feature in spontaneous answers at all.

Behavioural economics teaches us that human behaviour is often automatic and unthinking, and is shaped far more heavily by momentary contextual factors than we realise. These contexts can be both internal and external. They include our automatic habitual responses, the heuristics or rules of thumb that we follow every day, and the constraints of the physical environment. The problem for qualitative researchers is that these factors, which we adapt to without thinking, are not easily brought to mind when we are asked to think about why we behave the way that we do.



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What Freud wouldn't do: the lessons of behavioural economics

In this way, the 'unconscious' factors that often trigger behaviour are not a pool of deep desires and feelings such as that conceived of by Freud, but an active, adaptive management system, focused on navigating life and responding to the physical environment as efficiently and effectively as possible. One frequently observed outcome is that people do not usually seek out ideal solutions; instead they 'satisfice', adopting choices that are 'good enough' but avoid them expending angst and energy seeking something better.

Our whisky connoisseur is a satisficer in action, modifying his own strong personal convictions because, in this situation, he is buying a bottle for a group of four colleagues to share and his governing heuristic or rule of thumb is to buy the bottle that everyone will like – and consider suitably upmarket. Setting aside his own preferences, he goes for the brand that he knows everybody else is most likely to approve of.

'Fridge fit' is a well-known example of a satisficing heuristic that leads shoppers to make unexpected choices in categories like salad dressing. They choose their dressing not based on how well it fits with their beliefs about food and nutrition, but on how well it fits into their fridge. Rustic, wholesome, organic brands which use rustic-looking, squat, wide bottles for their dressing, often fall foul of this heuristic.

Qualitative research has traditionally focused on understanding the needs and emotions associated with brands and categories: the connoisseurship and distinction associated with single malt whisky, the nostalgia and nurturance in a mug of Horlicks, the warmth and homeliness of a rustic brand of salad dressing. This approach aligns with the human brain's inherent striving for meaning, interpreting, categorising and generally making sense of our actions for future reference.

The need for rustic, wholesome dressing is in no way less 'real' or 'true' than the inclination to buy something that will fit in the fridge, but it is not the full picture. And if we are to influence behaviour in desired directions we need as full a picture as possible. This is the real lesson of behavioural economics: the importance of focusing on real choices; what people really do, not just how they feel.

Focusing on needs and motivations helps us identify positioning opportunities, shape brand identities and give them meaning, and craft compelling communication. Focusing on behaviour helps unravel habits, shape usage and influence choices at the point of purchase. Both are essential for a complete understanding of how we make the choices that we do – and for qualitative research to make the fullest possible contribution to brand and product strategies.

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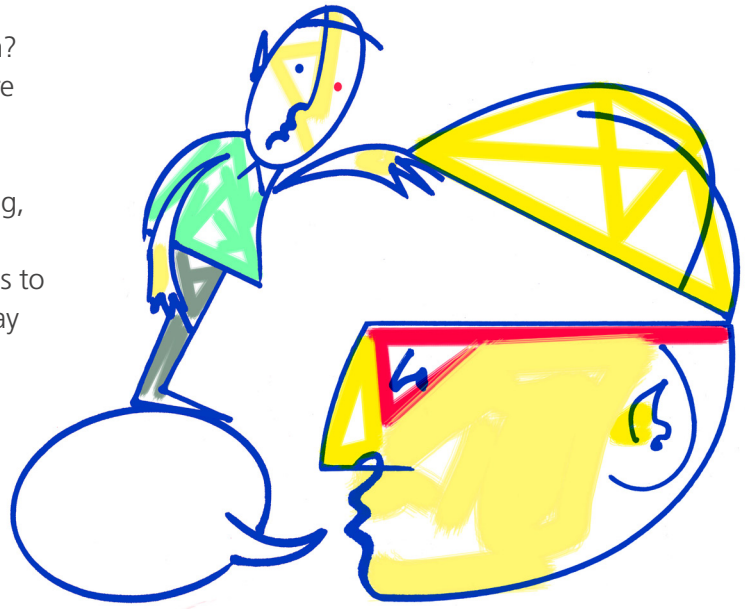
Analysing the adaptive unconscious

In his book 'Strangers to Ourselves', psychologist Timothy Wilson talks about how "It can be fruitless to try to examine the adaptive unconscious by looking inward." Wilson argues instead that "It is often better to deduce the nature of our hidden minds by looking outward at our behaviour (…) and coming up with a good narrative."

Since habits and heuristics are shaped by contextual factors, understanding their influence often requires us to observe or recreate the contexts in which choices are made. Diary formats give vital clues as to the actual context within which choices are made, observation of live behaviour is absolutely crucial for determining what behaviour actually takes place within these contexts. And where the behaviour of interest is not current, it is vital to find ways of reconstructing past events and behaviour in as vivid and accurate a manner as possible. In this area, qualitative researchers can make great progress by borrowing techniques from another profession that involves a lot of similar questioning.

Police interviewing and unreliable eyewitnesses

Eyewitnesses who have unsuspectingly witnessed the events surrounding a crime have often been exposed to trivial details, which have since acquired vital importance. The problem is, they had little interest in recording or remembering these details at the time: What was the number plate of the car that drove past as they were walking down the street at 8 pm? Was the window they passed open or closed? Were they arguing or merely excited? Such details were not accompanied by any emotional charge when they were first experienced, to help lay down strong, readily recalled memories. And in the absence of those memories, officers must use other techniques to activate the neural connections around the everyday details that witnesses observed.



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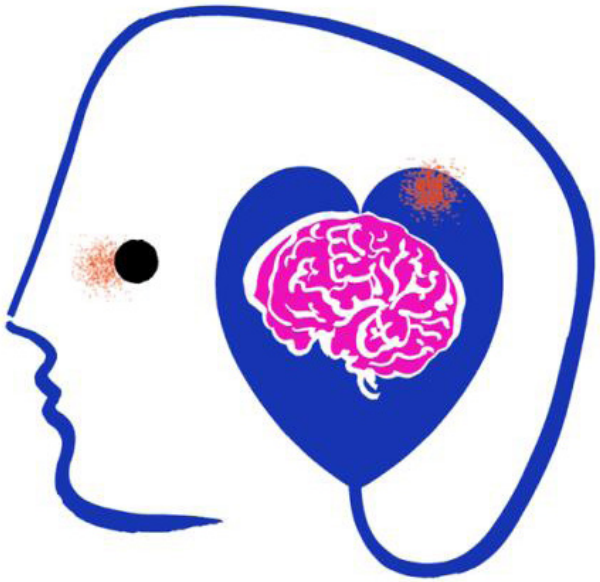
Recreating context

The technique that police officers use to achieve this is known as cognitive interviewing. It was developed in the 1970s by the researchers Ronald Fisher and Edward Geiselman and adopted by police forces worldwide when it was shown to improve the quality and accuracy of eyewitness recall.

Cognitive interviewing is based on the idea that a failure to remember something is a failure of recall rather than a failure of encryption: once something has been encoded in our long-term memory, it is there to be found, if we know where to look. An analogy is a lost computer file: if we have the right codes to retrieve it, we will be able to do so.

The codes that cognitive interviewing uses to achieve this are contextual: an event is stored in memory along with the images, sounds, emotions and inner states of being that accompanied it. Any one of these contextual factors can help to bring back a memory – think of the flood of memories we can unexpectedly experience when we visit a childhood home, smell a familiar perfume or hear a 'forgotten' piece of music. The closer we can take the mind to a state in which it originally experienced something, the more likely the memory is to return. There is even evidence that an event experienced when you are drunk is more likely to be remembered if you become drunk again.



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The case for cognitive interviewing

Applying these cognitive interviewing techniques to qualitative research can provide interviewers with the tools to access the details of habitual behaviour and heuristic-driven decisions that their subjects do not consciously think about. Doing so requires a patient, narrative-building approach to interview, which follows the subject's story and allows it to proceed in a free-flowing manner that enables contextual connections to emerge. And it requires an interviewer with particular qualities: the ability to allow meandering and avoid interruption, being comfortable with silence, and above all, having deep reserves of patience.

When TNS asked the lapsed Horlicks drinker to describe her daily routine in this way, no longer focusing directly on explanations for lapsing, other clearly important factors started to emerge. Rather than declining, her emotional need for Horlicks had actually increased with the pressures of work – and she deeply missed drinking it. Rather than changing needs or motivations, the explanation for her change of behaviour in fact lay in changing contexts and internal and external cues: working long hours and getting home late meant she did not have the time or patience to make herself a cup of Horlicks late at night; she had switched to drinking green tea as part of a fitness regimen, and this started to spill over into her evenings since the drink was easier to make; she had also switched to soya milk to lose weight and her occasional inclination to make a cup of Horlicks at home was squashed because only soya milk was available in her fridge; she had taken up smoking and savouring her first cigarette of the day in the morning did not leave her time to make Horlicks; besides, tea went better with a cigarette than Horlicks did and was easier to make as well. The heuristic that green tea was more convenient to make became a habit that triggered her to drink it in almost every situation, despite the fact that on balance, she expresses a strong preference for a comforting drink like Horlicks on several of these occasions. Ironically, the need to be healthy should have given a 'health beverage' like Horlicks a firmer place in her repertoire of beverages. However, the habits and heuristics resulting from new contexts for her consumption pushed Horlicks out of the picture entirely.

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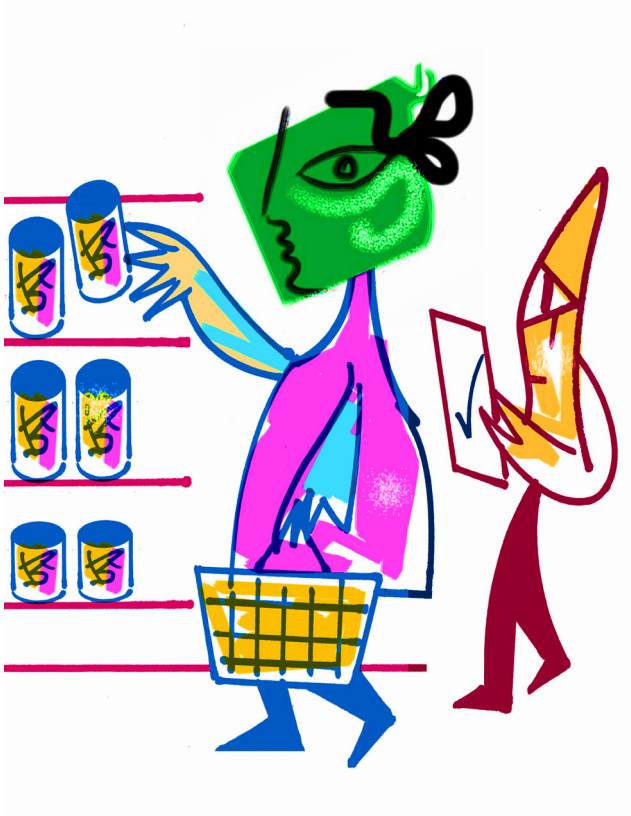
For Horlicks, the recommendations that emerge from this approach are very different from those revealed by focusing on the brand's fit with the user's needs and motivations. Rather than re-engineering the product or brand identity in an attempt to make it more relevant, (it is already very close to this woman's ideal), Horlicks should focus on making it easier for our shopper to drink it: communicating behaviour and consumption contexts that fit with her current life: making Horlicks available in the right format for the constraints of her time and the physical environment (via office vending machines or as single-serve sachets for example), or suggesting the possibility of using soya milk as an ingredient.

The presence or absence of contextual cues often lies behind changes of behaviour that individuals themselves have trouble explaining. Our would-be gym-goer, for example, is frustrated because she knows that in her last job, when she worked in an office with a gym downstairs, she worked out almost every evening. Why can she not bring herself to do so now? After all, the nearest gym is only a stop away on the tube. The answer lies in a contextual cue that has been removed. At her last workplace, colleagues were always stopping by her desk on the way to the gym. This provided a stable context and a regularly repeated cue for her to go. When it was removed, in an environment where colleagues no longer go to the gym as a group, the gym-going behaviour ceased. The strength of her motivation has not changed, but the triggers for her behaviour have.



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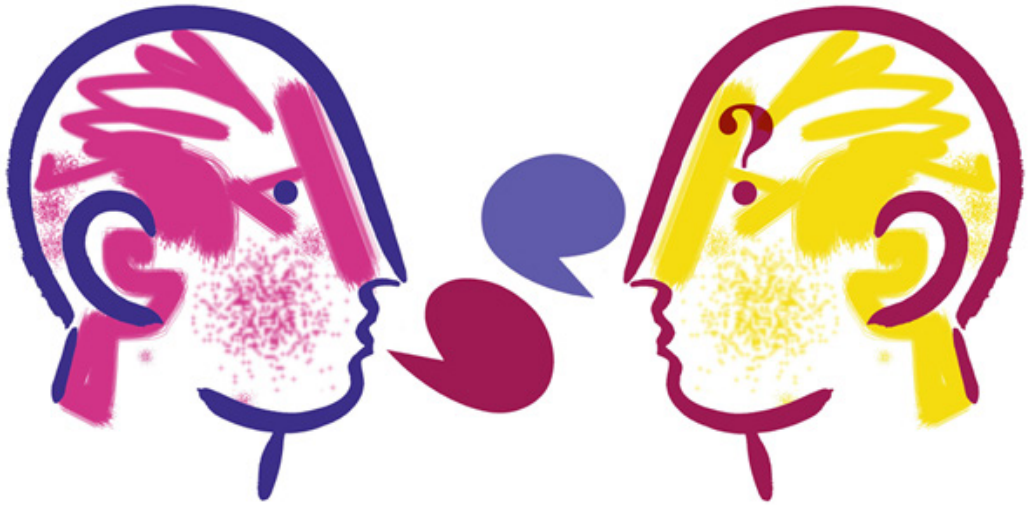
Committing to interpretation

Techniques such as cognitive interviewing can make an immensely valuable contribution to understanding consumer behaviour and developing strategies to influence it. However, it is a contribution that requires commitment on the part of qualitative researchers themselves: a commitment to the interpretative role of expert interviewers. Fragments of consumer contexts need a researcher to string them together into a coherent narrative, and the answers rarely come directly from respondents' own analysis of events. Taking people's responses and self-diagnoses at face value is a trap that too much qualitative research is starting to fall into. To understand consumer choices in a meaningful way, we must commit to a role for techniques that can add crucial additional perspective by revealing the role of our adaptive unconscious. Otherwise, the true threats and opportunities for brands will continue to remain something of a mystery.



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About the author
Anjali Puri is Managing Director, TNS Qualitative, Asia-Pacific. A seasoned qualitative researcher with over two decades in the industry, Anjali has been active in the development of new qualitative methodologies, and has contributed to shaping contemporary thinking in qualitative research globally, particularly in the areas of consumer choices, behaviour change and social media.

Passionate about understanding cultures and how they shape our relationships with brands, Anjali is currently working on understanding how archetypal needs translate across cultures.

Anjali is a frequent presenter at ESOMAR and other industry forums, and has received multiple awards, including the 'Best New Thinking' award by the UK MRS as well as the prestigious Atticus Award in 2013 in the 'Research in Practice' category.