

### 1. Introduction to Research

Master in Research for Design and Innovation (MIDI)

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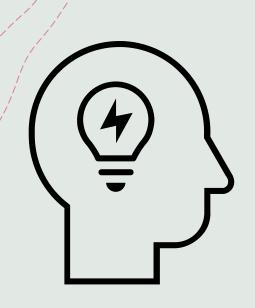
### WORKSHOPS overview (2020-2021)

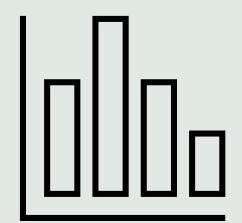
- 1. October 30<sup>th</sup>: Introduction to Research (MS Teams)
- 2. November 24<sup>th</sup>: Market Research and Consumer Psychology (MS Teams)
- 3. December 9<sup>th</sup>: User Journals (face-to-face)
- 4. December 15<sup>th</sup>: Qualitative Data Analysis (MS Teams)
- 5. December 16th: Consumer Sociology (MS Teams)
- 6. January 13<sup>th</sup>: User Communities (face-to-face)
- 7. January 13<sup>th</sup>: User Journals delivery (face-to-face)

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- 1. Qualitative vs. Quantitative research
- 2. The different phases in a Design & Innovation research project
- 3. Qual research techniques we use in Design & Innovation projects
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### 1. Qualitative vs. Quantitative research





## Qualitative vs. Quantitative research



#### QUAL research is focused on EXPLAINING human behaviour

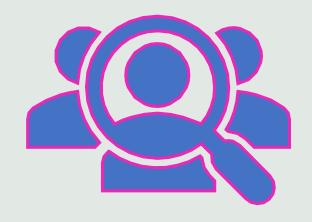
- 1. Smaller sample
- 2. More flexible in design
- 3. More interpretation in the analysis
- 4. More addressed to the emotional behaviour
- 5. Social sciences reliability



### QUANT research is focused on **DESCRIBING** human behaviour

- 1. Bigger sample
- 2. More structured in design
- 3. More objective analysis
- 4. More addressed to the rational behaviour
- 5. Statistic reliability

## Qualitative research is about UNDERSTANDING behaviour



- 1. A research with a **small sample** (N = 5-96 approx.)
- 2. Aiming to understand the **REASONS WHY** of certain attitudes and behaviours in order to develop **actionable recommendations** that help react with anticipation and creativity to market trends.
- 3. Based on the direct interaction with the target, pursuing to know their needs, motivations, triggers, barriers and expectations, including both, the rational as well as the emotional ones.
- 4. Allowing to reproduce, in a more or less realistic way, social dynamics since consumers / users are researched taken into account their social and cultural context.

### What is qualitative research for us?

1. Listening

Listening to, observing and contextualizing a sample of users

2. Analyzing

Analyzing their responses and behaviour, so that we understand them in order to reach useful insights

3. Delivering

Delivering actionable recommendations to our clients so that they are able to take decisions related to the objectives / challenge of the research









### Qualitative research is at the heart of INNOVATION...

The real magic lies not in seeing new landscapes, but in having new eyes.



Marcel Proust Paris (1871-1922) Writer



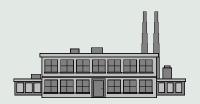
Thoughts, like fleas, jump from man to man. But they don't bite everybody.

George Bernard Shaw
Dublin (1856-1950).
Writer. Nobel Prize Literature winner
(1925) and Oscar to best adapted script for
Pigmalion (1938)

...it is the basis for LEARNINGS that lead to INSIGHTS that turn into **new products or services** 



"In the factory we do cosmetics. In the store we sell hope."









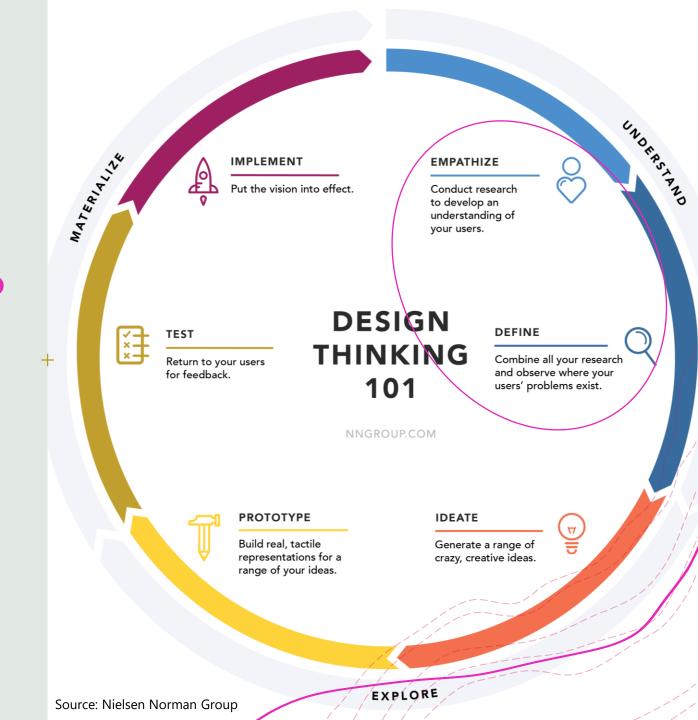
#### **SUMMING UP:**

Qualitative research is about providing strategic recommendations to companies based upon users' **deep understanding.** 

## 2. Phases in a Design & Innovation research project

Research focus is on UNDERSTANDING users, which involve the first two phases:
EMPATHIZE and DEFINE

After doing user research to find out the unmet needs and the market segmentation, we'll be ready to generate new concepts that meet these needs within a particular target.



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Brands have chosen to strengthen their trust with consumers, showing empathy and being transparent.



Kristiana Carlet Stagno

VP EMEA Verizon Media

## From EMPATHIZING with users to DEFINING new opportunities for innovation:

We'll focus on these in the next pages...



1. Briefing with the client

2. Research proposal

3. Screening the participants and preparing the field work

4. Field work

5. Analysis of the information and preparation of the report

6.
Presentation of the results

It should provide enough information to allow us DEFINE THE CHALLENGE

It can be exclusively oral, but usually the client provides some documentation to better understand the background and the objectives of the study (market share, market evolution, etc.)

The briefing consists of the meeting with the client to identify what their demands and needs are



After the briefing with the client, we prepare a research proposal that meets the needs of our client and will allow us overcome the challenge

It usually contains the following sections:

1. Background

2. Objectives or challenge

Methodology & sample

4. Timing 5. Bu

5. Budget

6. Ethical codes

We'll focus on these to

### 1. Background

The background is the information provided by the client in the briefing that allows us to contextualize and understand the objectives of the study

E.g. Our client, a brand of **jeans**, is losing market share due to the share increase of more "youthful" brands and wants to explore the potential of its **new jeans design to rejuvenate the brand.** 

E.g. There is a general market **trend towards vegetal milk** and our client, a brand of **yoghurts**, wants to
explore the potential of **different vegetal compositions within the yoghurt category.** 





## DEFINING THE OVERALL OR MAIN OBJECTIVE / CHALLENGE

 Refers to the basic issue we are going to respond to through the study (e.g. evaluate the potential of a particular concept or product)



### **DEFINING THE SPECIFIC OBJECTIVES**

 Refers to the different aspects we are going to research in order to achieve the overall/main objective (e.g. impact, awareness, relevance, drivers, barriers, differentiation, etc. of what we are researching)



### We have to define the sample first



#### Who do we need to interview

Users, company workers, stakeholders, etc...





### **Profile of the participants**

Main characteristics participants must have in order to participate in the study





#### **Locations**

Country or countries and city or cities in which the field work will be carried out



2. Research proposal

3. Methodology & sample We have to decide on the techniques we will use, and explain and justify them







Shall we do individual or duo indepth interviews, ethnographic interviews, shop-along, focus groups, or an online community???

Usually we do a **mix of different techniques**, but
which ones?

AND WHY?



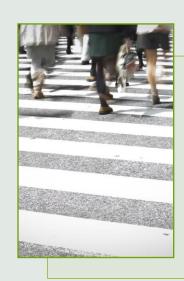




2. Research proposal

3. Methodology & sample

## Finally we have to decide on the size of the sample



### Size of the sample

How many In-Depth Interviews, Focus Groups, etc. will be conducted and how many individuals will be interviewed in total.



## 3. Qual research techniques we use in Design & Innovation projects

## Qualitative techniques to achieve users' understanding



**Online communities** 



**Focus groups** 



**Individual interviews** 

**Shop-along** 



**Duo interviews** 



**Ethnographic interviews** 





# In-depth interviews are about having a conversation with a research purpose

- In-between an informal chat and a formal conversation
- The researcher uses an interview guide, but constantly adapts her/his questions to the interviewee's speech
- They are usually one-to-one, but they can also be done in pairs when the bond is relevant for the research (e.g. parent & child) or facilitates participation (e.g. friends when doing research with kids)

Appropriate when doing research:

- On sensitive / intimate topics (e.g. Sexuality, serious illnesses)
- On consumer segmentation / creating different profiles
- With **key informants**, such as key opinion leaders (KOLs), trendsetters, etc.
- To understand individual decision processes

### IDIs can have different formats



#### In-home or at the workplace

When being possible for the researcher to visit the participants and participants accept being visited by the researcher



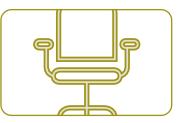
### **Online (using some platform)**

A better alternative when covering different locations or to facilitate participation



#### By phone

Alternative to the online interview when participants' internet connection is not good enough



### In facilities / co-working office

When needing a more neutral or professional environment



# 3.2. Focus Groups (FGs)

# Introduction to Focus Groups (FGs)

- + Very useful when we need to:
  - + Explore some category, product or brand
  - + Explore trends
  - + Test concepts, packaging, communication, etc.
  - + Work in teams



### Introduction to FGs



FGs help understand a topic from different points of view



Standard size of FGs is 6-8 participants.

Micro FGs (4 participants) are used when the subject is more sensitive or there is the need to get deeper information



Each participant is stimulated to express his/her point of view and exchange opinions with the other participants. IT IS NOT A MULTIPLE INTERVIEW



Participants have to **share similar characteristics** → need to pass a screener questionnaire



Main purpose is not to get consensus from participants, but let them express their own perceptions, feelings, experiences and opinions in a spontaneous and varied way



Last between 1,5h and 4h

### Moderation of FGs: THE SETTING

The setting is very relevant in order to achieve:

A relaxed and easy-going atmosphere

A feeling of comfort, trust and emotionality

An easy flow of non-verbal communication

For this reason, it is <u>not</u> recommended to use a traditional "meeting room", but to use a more "cozy" and informal room.

### FGs setting can be more or less formal...



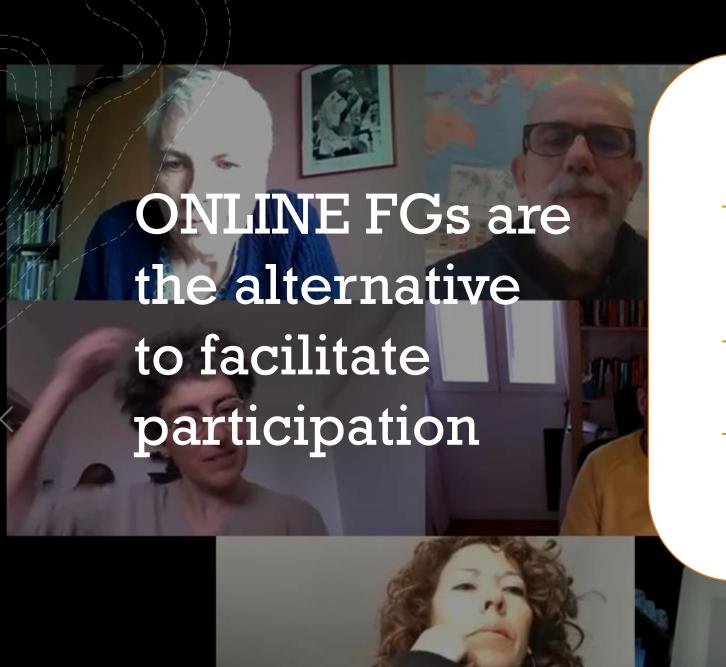












- +We can use **different platforms** (Zoom, Miro, MS
  Teams, Recollective, etc.)
- + Recommended duration: from 1h to 2,5h
- + Participants: from 4 to 6

### IDIs vs. FGs

	IDIs	FGs
ADVANTAGES	<ul> <li>More depth in the analysis: more intensive, more time for each interviewee</li> <li>Not contaminated by the group influence</li> </ul>	<ul> <li>More variety in responses: more extensive</li> <li>Useful to confirm insights obtained through other qualitative techniques</li> <li>Or to explore some topic</li> <li>Cheaper</li> </ul>
DISADVANTAGES	<ul> <li>More time consuming</li> <li>More difficult to organize</li> <li>(20% do not show up)</li> <li>More expensive</li> </ul>	<ul> <li>Time for each interviewee might be disproportionate depending on his/her role.</li> <li>Lower average time for each interviewee</li> <li>More difficult to organize B2B fieldwork</li> </ul>

## 3.3. Ethnographic interviews

### The ethnographic interview comes from Anthropology

### 1. Combination of observation & conversation

+ The interview incorporates contextualized content → everything we observe enriches what is said.









### 2. Directly linked to participant's life story

of the person's relationship with what's being studied.

# Shopper studies: THE SHOP-ALONG (SHADOWING)

- + We can also use the ethnographic methodology to do research on SHOPPING BEHAVIOUR → we examine actual shopping behavior rather than behavior that is recalled and reported after the event.
- + We **go along with consumers in their shopping trip** and observe how they make purchase decisions, what the motivators are, how the context influence their decision, the role of emotions, etc.
- + Almost any shopping experience can be studied with this research technique; some common sites are:
  - + Supermarkets, hypermarkets or megastores, retail stores, pharmacies, malls, car showrooms,...
- + We can contact the participants by a recruitment agency or we can do **on-site intercepts to screen shoppers as they are entering the shopping site**.
- + We usually use our smartphone to **take photos and mini videos** for later analysis and eventual illustration of the report.

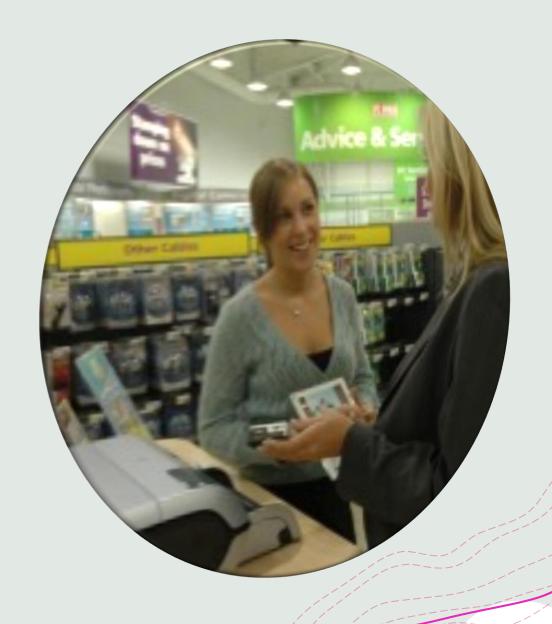






### Shopper studies: THE MYSTERY SHOPPER

- + It is a type of ethnographic research with the objective of evaluating the quality of Customer Service
- + The Researcher or "Mystery shopper",
  performs as a normal client and then reports
  to the research team her/his experience as a
  shopper
- + There is a **check-list to complete** (variables to be researched) + the Mystery shopper observations
- + Main purpose is to IMPROVE CLIENT SERVICE AND CLIENT SATISFACTION





# User diaries are a basic tool within the user-centered design techniques

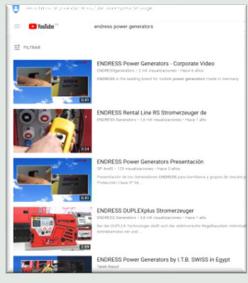
- + User diaries are used to **examine the use of a product or service over time** by providing users with a means of delivering continuous feedback over time
- + A Diary study involves asking participants to record their activities and experiences with a product or service over a given period of time
  - + They provide insight into WHEN and HOW a user experiences a particular product or service and are particularly effective at capturing insights at critical phases during the user lifecycle (e.g. new customers' or returning customers' experience)

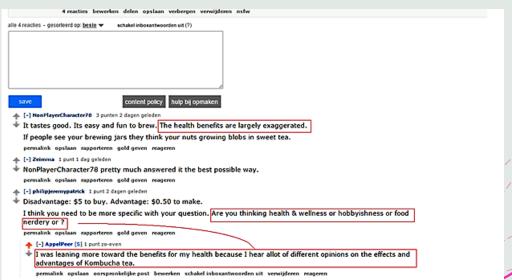
### Ethnography on the net: Netnography

#### ETHNOGRAPHIC MATERIAL IN SOCIAL NETWORKS

- + Social networks, such as Instagram, TikTok, YouTube, etc. can be used to do some **desk research on what consumers are talking about a specific category, product or service** Please Net Observation.
- + But we can also **perform as "members" and then take an active role by interacting with other members** (e.g. forums) Participant observation.



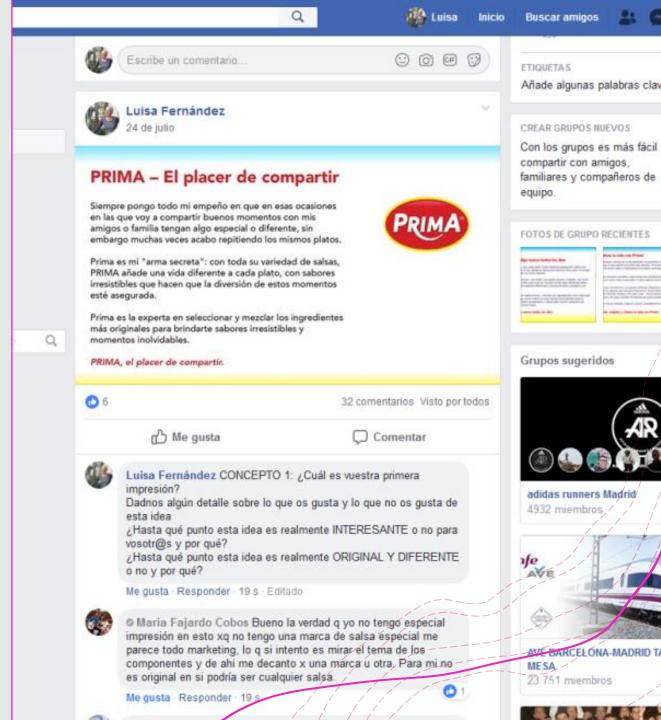




### 3.4. User communities

### How do User Communities work?

- + We use a platform where a Moderator or Facilitator regularly launches a topic to be discussed or an activity to be developed, and follows up the discussion or the development of the activity
- + Duration: from a few days to several months (with breaks)
- + Participants: **from 6 to 50**, or up to 100 (more than one Moderator)
- + User Communities usually **require a high involvement from participants** (making videos about the product usage, visiting a shop, making a collage, etc.)



# 3.5. Screening participants



### How do we select the people who will participate in our research?

To select the participants we have to think **what characteristics they must fit** with and write a screener

which selects ("screens") those who meet these

characteristics

This screener will contain **STANDARDIZED QUESTIONS**, which always apply, regardless the sample characteristics, and **AD-HOC QUESTIONS**, which depend on each particular sample characteristics

## 3. Screening the participants and preparing the field work

### STANDARDIZED questions to select the participants



Initial questions to screen **people connected with professional sectors that could interfere** with the confidentiality of the information or having a neutral attitude



Questions to screen "professional" participants, people who continuously participate in market research studies, since this "professionalism" interferes with the naivety and honesty we require from participants



Questions about **gender and age** are also basic when it comes to fitting each participant into a particular quota



Finally, in the case of **co-creation groups**, questions designed to screen **people with sufficient mental flexibility, abstraction and imagination ability** to successfully cope with the variety of projective and creative techniques they will have to manage

### AD-HOC questions to select the participants

3. Screening the participants and preparing the field work

- 1. /Frequency of consumption of the product/service: heavy, regular, or occasional
- **2. Brand preference:** client vs. competitors
- **3. Professional specialty and experience:** when it is a study with professionals from a certain sector (e.g. Doctors or Business people)
- 4. Personality traits: level of sociability, independence, conservatism, etc.
- 5. **Socioeconomic status**: there are standardized status questionnaires to determine the socioeconomic class in each country
  - + Class A = Upper
  - + Class B = Upper-middle
  - + Class C1 = Middle-middle
  - + Class C2 = Lower-middle
  - + Class D = Lower

## 4. Recommended bibliography and online resources

#### Recommended bibliography

- \*Qualitative research methods. Monique Hennink, Inge Hutter, Ajay Bailey. 2020
- + The emotional nature of qualitative research. Kathleen Gilbert. 2019
- + Introduction to Qualitative Research Methodology: A Training Manual. Kielmann, K., Cataldo, F. and Seeley, J. 2012
- + Winning at innovation. Trias de Bes & Philp Kotler. 2011
- + Understanding Research: A Consumer's Guide. By Vicki L. Plano Clark and John W. Creswell. 2009
- + Qualitative market research: a comprehensive guide. Hy Mariampolski. 2001
- + The Strategy of Desire. Ernest Dichter. 1960

#### Recommended online resources

- + http://www.marketingdonut.co.uk/market-research/questionnaires-surveys-and-focus-groups/what-is-qualitative-research
- + <a href="https://optinmonster.com/qualitative-research-methods-for-understanding-your-user/">https://optinmonster.com/qualitative-research-methods-for-understanding-your-user/</a>
- + https://www.quirks.com/articles/qualitatively-speaking-the-focus-groupvs-in-depth-interview-debate
- + https://www.youtube.com/watch?v=M 70RSHvqPM
- + https://www.youtube.com/watch?v=9t- hYjAKww
- + https://www.researchgate.net/topic/Qualitative-Research

# 5. INTO PRACTICE: Reframing the research question

### Let's put research into practice...

#### **Project**

mmm

#### Workshop

- Discuss and determine the OBJECTIVES or challenge of your research project.
- 2. Discuss and determine who the TARGET is: the sample and the different segments within it you need to work with, and how you will recruit the participants.
- 3. Discuss and determine what qualitative TECHNIQUES fit the best with achieving the objectives and reaching the different segments.

### Contact

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