Creative Exercises in Qualitative Market Research

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A major challenge with focus groups is getting participants to open up and share deeply held attitudes and motivations. Some respondents are reluctant to share personal beliefs in front of a group of strangers, particularly if they believe that their views will reflect badly on them. The old saying that, “People talk skinny but eat fat,” illustrates how difficult it can be to get people to reveal their true opinions and feelings. In some cases, respondents may not even be aware that they hold certain beliefs or understand why they make certain decisions. There are many creative exercises that moderators can use to uncover these hidden beliefs.

A related challenge is engaging focus group participants long enough to build trust and get them to provide enough useful information to guide decision making. We recommend longer than usual focus group discussions, typically three-and-a-half hours. Longer sessions allow moderators to take time to relax participants, get them to open up, and cover a broader range of topics in greater depth. However, with longer sessions, creative exercises are critical – they keep groups engaged by creating a fun and energizing atmosphere.

This paper describes a wide range of creative exercises to engage focus group participants and provide a deeper level of understanding and insight from qualitative market research. It also provides guidelines for building effective focus group discussions around these exercises.

Note: in the interest of client confidentiality, no actual data from any client research is presented in this document. Data presented in all examples has been disguised.
Creative Exercises

The creative exercises we use in focus groups can be broadly classified as “projective techniques” and “directive exercises.” Both methods are intended to engage groups and uncover personally held beliefs. With projective techniques, the emphasis is on understanding subconscious or hidden feelings, whereas directive exercises are intended to gather and organize large sets of information.

Projective techniques allow respondents to project their subjective beliefs onto other people or objects. Individuals’ feelings are inferred from what they say about others. These techniques, originally developed by psychologists, provide non-threatening ways for participants to indirectly explore and discuss their feelings.

Directive exercises, as the label suggests, get to complex issues more directly than projective techniques and are particularly useful for processing or organizing relatively large sets of information a short time. These exercises provide a stimulus to engage participants and a structure to help them analyze and organize their thoughts.

Most of the exercises in this paper combine some elements of projective and directive techniques. As our focus is on the practical application of creative exercises, the methods are organized according to whether their application is oriented more toward opening up participants (more projective) or toward gathering and processing lots of information (more directive).

Best for Getting Participants to Open Up
- Word association
- Sentence completion
- Picture interpretation
- Cartoon completion
- Worst idea
- Metaphor drawings and collages
- Laddering
- Role plays
- Separation and reunification

Best for Gathering and Processing Lots of Information
- Prototypes and hands-on exercises
- Product / brand sorting
- Diagrams
- Attribute rating and ranking
- Concept analysis and benefit set synthesis
Creative Exercises for Getting Participants to Open Up

**Word association**
The simplest form of this technique is to ask group members, “When I say X, what's the first word that comes to mind?” In group settings, it is best to ask everyone to write their answers down before sharing, thereby eliminating “group think.” Participants are then asked to share what they wrote and to elaborate on why, which becomes the basis for group discussion.

**Sentence completion**
In sentence completion, respondents are given an incomplete sentence and asked to complete the thought. Two unfinished sentences that we use often to identify unmet wants and needs are given below; these can be adapted to a great many research objectives.

“When it comes to _________, the one thing that makes me tear my hair out is...”
“[Client company], you'd be really smart if...”

It is sometimes helpful to formulate sentences in the third person, making the exercise “more projective.”

“People who eat ice cream...”
“When people go to the movies...”

**Picture interpretation**
In picture interpretation, respondents are shown a picture and asked to describe what is happening, what dialogue might be going on between characters, or how the scene might continue. There are many types of picture interpretation exercises, the best known of which are probably the Rorschach Inkblot Test and the Thematic Apperception Test (TAT), both of which were developed for use in psychotherapy. Picture interpretation helps participants express their true beliefs and attitudes more easily by allowing them to project hidden feelings or associations onto a neutral scene.

What sort of picture is appropriate depends entirely on the research objective. When doing open-ended exploration, pictures should be vague so as not to lead the conversation too much. On the other hand, if the need is to focus the conversation around a particular product area, showing people using the product in typical situations is entirely appropriate.
**Cartoon completion**
Cartoon completion combines the sentence completion and picture interpretation approaches. Participants are given cartoons with empty dialogue balloons and asked to fill them in. Their responses are then used as the basis for discussion.

One advantage of using cartoons is that they invite the group to loosen up and have fun with their replies. Cartoon completion is a non-threatening, third-person, projective technique – you are not asking the respondents what they would say but, rather, what the characters in the cartoon would say. As with picture interpretation, the cartoon images should be designed or selected to support the research objective, ranging from vague situations to highly suggestive situations such as the cartoon shown here.

![Cartoon Image]

**Worst idea**
The worst idea exercise is an adaptation of a brainstorming technique intended to generate new, good ideas. In that technique, participants are asked to offer a bad idea, the worst idea they can possibly think of, as a solution to the problem at hand. The bad ideas are then presented as stimuli to the group, which is asked to transform the bad ideas into good ones.

Consumers generally are not very good at generating solutions to problems but they are very good at telling us what they don’t like. In the focus group adaptation of this exercise, participants are simply asked to offer bad ideas. Then, it is the job of the moderator and the research team to analyze responses and identify underlying insights, which can later be used to inspire the generation of solutions.

This exercise is effective because it takes the pressure off of the group to come up with solutions to problems. It’s a fun and energizing method that helps respondents loosen up by relieving the fear of saying something dumb. Finally, the bad ideas often reveal needs in a way that suggests solutions to product development teams.
**Metaphor drawings and collages**

Metaphor drawings and collages help consumers talk about products, services, or brands by using imagery to share how they feel. If we simply question consumers about a brand, for example, we tend to get a description of the brand’s products and functional attributes. When we use imagery, we learn about how the brand makes people feel, how they interact with the brand, and what the brand means in their lives.

Constructing collages is one of the simplest imagery exercises. Participants are given a flipchart, a role of tape and a pile of magazines. It is best to offer a wide assortment of magazines that are not directly related to the subject matter, so participants can relate their feelings through imagery rather than literal descriptions. Participants are asked to rip out pictures and create a collage entitled, “How I feel about __.” Then, participants share their collages with the group to fuel a discussion.

Metaphor drawings can be a little more challenging because people are sometimes uncomfortable drawing. However, if the moderator sets the bar low – “stick figures are OK” – drawing exercises not only deliver rich imagery, they can be quite fun, generating a lot of laughter and energizing the group.

Anthropomorphization or personification metaphors, where participants are asked to represent an inanimate object as if it were human, work particularly well when trying to understand how consumers feel about brands. They are asked to draw the brand as a “person” and note his or her name, occupation, what they drive, how they dress, and so on. The resulting discussions deliver a rich description of brand perceptions by actually bringing the brand to life.

When trying to identify the most important features or benefits of a particular type of product, other metaphors tend to deliver better results. Participants can draw the ultimate product as a combination of animals, a superhero, or a space ship. Care should be taken to provide metaphors that are not too close to the product category so that consumers don’t get too literal.
**Laddering**

Laddering is a probing technique, developed for use in psychological interviews, that can work well in focus groups. Laddering uncovers the underlying reasons for participants' attitudes and behavior toward a topic. A particular feature or benefit of a product, service, or brand is identified in the discussion. The moderator asks, “Why is that important to you?” Whatever the response is, the same question, “Why is that important,” is asked repeatedly. The exercise is generally played out by the fifth or sixth “why,” with the underlying reasoning having been revealed. Laddering can be used with an individual in front of the group, with paired teams writing responses on flip chart sheets, or with the full group.

**Role plays**

We use two very different types of role play exercises, situational performance and anthropomorphic role plays. In situational performance, session participants simulate real life situations either as themselves or someone they know. In anthropomorphic role plays, one or more of the participants assumes the identity of some inanimate object such as a product.

Situational performance exercises help participants demonstrate specifically, in a step-by-step manner, what goes on in certain situations. In a group of nurses, one person might play the role of nurse and the other the role of patient, or one might play a parent and the other play the child patient. The former situation might be more useful for having nurses demonstrate a particular medical procedure, while the latter might focus on the conversations and emotions that the nurses experience around them.

Anthropomorphic role plays, where members of the group assume roles of inanimate objects, are excellent ways to identify issues with existing products or systems. Suppose we are trying to develop an improved copy machine. Each person in the room is assigned the role of a different component of the machine: the paper tray, the collator, and so on. Then, the group is simply asked to have a conversation. Very quickly, issues in the operation of the unit will arise and create opportunities for improvement.

Another great use of anthropomorphic role plays is in positioning products or brands. Participants are paired up and one is asked to assume the role of a product on the shelf while the other is assigned the role of a shopper. The “products” are asked to sell themselves to the consumers. What emerges in the ensuing discussion is a picture of the compelling features and benefits that consumers are seeking in that product.
Separation and reunification

This technique helps to identify opportunities for innovation when multiple parties are involved in any process, for example, doctors and patients, dispatchers and truckers, or, as in this example, parents and children. The parents meet in one room, while the children meet in another. During the course of the discussions, the moderators collect certain responses, in this case, what the child most likes to do, what he or she never eats out of the lunchbox, and what the child thinks is a fun food.

Toward the end of the session, the parent and child groups are reunited, and their responses are presented in a table such as the one shown here. The ensuing discussion around the similarities and differences can be quite revealing, fun, and sometimes just a little embarrassing (see child 2 in the table).

<table>
<thead>
<tr>
<th>Pair</th>
<th>Likes to Do</th>
<th>Never Eats</th>
<th>Fun Food</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child 1</td>
<td>Video games</td>
<td>Sandwich Fruit roll-up</td>
<td>Cookies Fruit roll-up</td>
</tr>
<tr>
<td>Parent 1</td>
<td>Sports</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Child 2</td>
<td>Football Sports</td>
<td>5-day-old black-eyed peas</td>
<td>Skittles Lunchables</td>
</tr>
<tr>
<td>Parent 2</td>
<td>Sports</td>
<td>Eats everything</td>
<td></td>
</tr>
<tr>
<td>Child 3</td>
<td>Yu Gi Oh Reading</td>
<td>Salad Fruit</td>
<td>Oreo’s with tattoos Gatorade</td>
</tr>
<tr>
<td>Parent 3</td>
<td>Reading</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Child 4</td>
<td>Sports Scouts</td>
<td>Egg salad sandwich Carrots</td>
<td>Fruit roll-ups Fruit roll-up</td>
</tr>
<tr>
<td>Parent 4</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Creative Exercises for Processing Lots of Information

Prototypes and hands-on exercises
There is a wide range of applications for the use of prototypes in focus groups. When developing products such as medical devices, office equipment, machinery, and software interfaces, prototypes help consumers explain to designers the features they want and the ways they wish to interact with these products.

When conducting exploratory research early in the product development cycle, foam models and packaging mockups are invaluable. Modular foam models of equipment in development allow consumers to react to various design configurations and industrial designs. Foam or cardboard models allow participants to imagine designs as adaptable, not cast in stone. This enables them to react positively to certain discrete features, functions, or benefits of a concept and negatively to others without having to have a thumbs-up, thumbs-down mentality toward the entire concept.

“Paper prototypes” can be used to simulate the operation of a user interface or web site long before any code is written. Developers show respondents what each screen looks like and what happens when certain actions are taken. This helps them create a look and feel as well as a logical flow that makes sense to end users.

“Hands-on” exercises can surface issues that arise when consumers interact with existing products. By asking an end user to operate a piece of office equipment, we not only learn shortcomings of the unit but also identify limitations caused by the lack of knowledge or capability of the end user. Having a room full of bakers open, use, and reseal a baking staple reveals deficiencies in the packaging and the solutions consumers have devised to overcome them. This approach is not quite as informative as observing consumers in their own environment but neither is it as costly or time-consuming.
Product / brand sorting
Sorting exercises help researchers understand how consumers think about a product or brand category. They can distinguish usage occasions, clarify relative brand positioning, and identify new “white-space” opportunities.

Sorting exercises can be unaided or aided. In aided exercises, participants sort through a set of product photos, brand logos, or product samples. The purpose is to limit the conversation to the finite set of items provided. More often, when we want to understand a broad category, we will use unaided sorts. Participants are given a broad category and a blank sheet of paper, then, asked to sort all the products they regularly use into clusters that they define and label. The table shown here illustrates a case where pairs were assigned the category of “all beverages you frequently drink.” What’s important is how participants define and label the clusters, as the cluster definitions illustrate how the consumers think about the category. The importance and meaning of the cluster labels can be further explored in an additional exercise such as laddering.

<table>
<thead>
<tr>
<th>Cluster Name</th>
<th>Beverages in Cluster</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Drink to Live</td>
<td>• Water, orange juice, milk</td>
</tr>
<tr>
<td>• Drink for fun</td>
<td>• Pepsi, coffee, beer</td>
</tr>
<tr>
<td>• At home</td>
<td>• Coffee, milk, water, juice</td>
</tr>
<tr>
<td>• Eating out or at big gatherings</td>
<td>• Soft drinks, tea, milk, mixed drinks</td>
</tr>
<tr>
<td>• Healthy</td>
<td>• Flavored water, Sprite, root beer, skim milk</td>
</tr>
<tr>
<td>• Not healthy</td>
<td>• Coffee, tea, beer, vodka</td>
</tr>
<tr>
<td>• Time together</td>
<td>• Wine</td>
</tr>
</tbody>
</table>
Diagrams
Diagrams provide a structure to help subjects organize and present their thoughts. Diagram exercises can be fixed, where the moderator dictates the format and even the dimensions of the diagram, or open-ended, where participants determine the structure they will use. These techniques are sometimes called “conceptual mapping” or “attitudinal scaling.”

The advantage of fixed diagrams is that they ensure uniformity of focus and presentation. Fixed diagrams enable researchers to compare and contrast the opinions of group members, looking for similarities and differences to probe, and to compare data across groups.

The diagram shown here illustrates a fixed-diagram exercise intended to uncover the key influences on teenagers. Participants are given flip chart sheets with a stick-figure “teenager” in the middle, surrounded by two concentric circles, and divided into quadrants. They are asked to list all the important influences on students, with the strongest influences written in the inner circle and weaker influences further out. Because of the uniform nature of fixed diagrams, it is possible to look at data across a series of groups and quickly compile an extensive list of influences.

The principle advantage of open-ended diagrams is that they quickly surface how respondents think about a particular topic. Where fixed diagrams force participants into providing information in a framework defined by the moderator, open-ended diagrams quickly focus on the dimensions that are important to consumers. When asked to create a diagram to illustrate what they do for entertainment, one pair created a bar chart like the one shown here. It clearly demonstrates that relative cost is a key factor in determining how often they choose any given activity.
**Attribute rating and ranking**

When we know the major attributes or characteristics of a particular product category, it is often useful to ask groups to rate performance against these attributes or to rank the attributes in terms of importance.

Rating tells us how well a product delivers on a certain attribute. If we ask a subject to rate the “appearance” of several different automobiles, we will learn which one has the “best” appearance, the “worst,” and the relative differences in appearance of the entire set in the mind of that person. However, we will not have an understanding how important, if at all, appearance of automobiles is to that person.

To understand the relative importance of attributes, we use ranking. Attribute ranking is particularly important in new product development, where design tradeoffs need to be made. A team charged with developing a new product identifies all of the attributes of other products in the same category. Ranking exercises can then be used to identify the most important half-dozen attributes in order to prioritize development efforts.

**Concept analysis and benefit set synthesis**

Concept analysis and benefit set synthesis is a way to identify all the positive and negative aspects of an existing concept or the desired features and benefits of a concept under development. While there are great many ways to implement this exercise, the underlying process is quite simple. Consumers are asked what they like, dislike and would wish for in an existing or envisioned product, service, or brand. The researcher catalogs and prioritizes these responses over a series of groups and synthesizes the most common and deeply felt responses into a refined set of attributes that can drive product or brand development.

An interesting implementation of this technique, particularly useful at the fuzzy-front end of the development process, is “whole-field” benefit set synthesis. Here, the positive and negative attributes of a very wide range of existing products, services, or technologies available in a given field are analyzed. Suppose, for example, one is developing a new communications device. Participants are each handed an index card listing three different communications devices or methods, such as the card shown here. They are asked to list what they most like and most dislike about each item listed. Each group member has a different set of devices, so a wide range of features and benefits are uncovered. The cards are used as the basis for discussion then collected for compilation and synthesis across a series of groups.

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Cellular Phone
Like: ____________________________
Dislike: _________________________

Direct Mail
Like: ____________________________
Dislike: _________________________

Pony Express
Like: ____________________________
Dislike: _________________________
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Critical Success Elements

Discussion Guide Development with Creative Exercises
Creative exercises can open up and energize focus groups but it takes experience to develop balanced and objective discussion guides built around them. Research projects begin with a shared understanding of the research objectives between the moderator, the researcher, and his or her internal client team. Then, the moderator selects a set of exercises and crafts them together into a discussion guide that will deliver the insights needed to meet the research objectives.

While every project is unique, there are a few general guidelines to follow when developing discussion guides. First, discussions should begin more open-ended and become more pointed as they progress. The early part of any session should focus on getting to know the respondents, their daily lives or their business operations, while concept analysis, for example, should come later. Similarly, it is better to open with “easy” exercises like word association and sentence completion; “riskier” exercises such as role plays should wait until the moderator has built some trust with the group. Lastly, it is important to carefully time each exercise so that discussions don’t feel rushed or choppy. The idea is to create the feeling of a natural discussion, all the while leading the group to the topics you need to cover.

A Supportive Format
In order for creative exercises to be most effective, we recommend longer session times than are typically used, often up to four hours. Longer sessions allow moderators to first loosen up and get to know participants. This, in turn, leads to more willingness to participate in “stretchier” exercises such as metaphor drawing and role play.

An important element of this approach is the setting. Four hours can be a long time to sit in a room full of strangers. A living room style setting, hand toys and puzzles, and refreshments in the discussion room all help participants relax. This format, combined with the use of creative exercises, creates lively, energetic, and informative discussions.

Collaborative Report Development
We believe it is critical to engage the client team in analyzing research results and developing research reports. Our collaborative report development approach capitalizes on the client team’s unique industry knowledge. We combine your team’s expertise with an experienced moderator’s perspective to ensure a thorough and accurate analysis. Further, collaborative report development builds internal support for research results, increasing the likelihood that the research will produce actionable results.
What Participants Say

“I’ve done a couple other focus groups and this is my favorite one. The format of sitting around together and brainstorming – I kind of feel like I’m on your team.”

“It almost gave it more of a human feeling to have these guys in the room with us. They were sweating, they were smiling, so you knew they felt it all. You could see it in their faces.”

“Four hours,’ I thought, ‘I can’t sit that long.’ But it flew by.”

“I liked the clients being in the meeting; I liked the interaction. I also liked the visual fun with the superheroes and that kind of stuff.”

“I liked that it was comfortable – you weren’t stuck around a conference table. You have couches and snacks and props.”

“I’ve seen these groups, I’ve even done these groups from the other side of the mirror... You’re one of the best moderators I’ve ever seen.”

About the Author
Frank Hines is a management consultant with over 30 years experience in international marketing, market research, strategy, product development, and innovation. He is an experienced focus group moderator and an expert in a broad array of qualitative research approaches. He has conducted research for a wide range of world-class clients including Bacardi, Dell, IBM, John Hancock, Kraft, McNeil, Pfizer, Pitney Bowes, Reebok, and Starbucks. Frank holds a BSME from Worcester Polytechnic Institute and an MBA (Magna Cum Laude) from Babson College.