What Lies Beneath? - using advanced techniques to really understand the consumer

Graeme Chrystal & Neil McPhee
Katterat – the Swedish/Norwegian border
200km North of Arctic Circle
What lies beneath?

- The largest part of an iceberg is underwater – only one-seventh to one-ninth is actually visible above the surface.

- The biggest ones tower as much as 400 feet above the surface of the ocean.
Qualitative Research in context

- Research and marketing models feature
  - Rationality
  - Logical decision-making
  - Self-awareness of real motives
  - Ability to explain/explore and describe
  - Cognitive and self-diagnostic abilities
Qualitative Research in context

BUT,

what if the Respondents can’t (or won’t) tell us the truth?

“What it comes down to is that modern society discriminates against the right hemisphere.”

Nobel Laureate, Roger Sperry 1973
Qualitative Research in context

• António Damasio
  • “over 85% of thought, emotions and learning occur in the subconscious mind”

• Gerald Zaltman
  • “95% of our purchase decision making takes place in the subconscious mind”

• Roger Sperry
  • "The great pleasure and feeling in my right brain is more than my left brain can find the words to tell you."
Rational vs. Emotional thinking

- Pharma tends to focus only on Rational response thinking
  - Is this warranted?
    - No
  - Why is this so typical?
    - Easy to understand
    - Mirrors “evidence-based” model
      - Assumes a cognitive, self-aware basis for decision-making
  - Does that really make sense?
    - No
Qualitative Research in context

- We argue that too often fails to take account of human realities
  - And researcher interactions

- Model too dependent of self-reporting
  - And too often on “our territory”, to our timescales
Are HCP’s always rational?

• No
  – Why prescribe...?

• “It is annoying to admit but there is little room for a logical and factual differentiation”
PROJECT COMPARATIVE
Project Comparative

- Two main world brands
  - Why declining sales of Brand “A”?  
    ◆ 3 waves of standard qualitative revealed NO REASON  
    ◆ Cognitive route had failed to produce required information/insights
  - Emotional/motivational research undertaken
Project Comparative

- DGs with 5-6 respondents per group

  - Questioning involved, in addition to standard rational issues, a review of:

    - Corporate image
    - Brand Image
    - Brand Name style
    - Brand Packaging
    - Packaging & logo Colour
    - Selection/usage criteria
Project comparative

**Range of techniques**
- Triangulation/Triads
- Cognitive Mapping
- Personification
- NLP (Neuro Linguistic Programming techniques)
- TA (transactional analysis)
- Lost in the Forest [© ZRP/Nuance Research]
Outcomes

- Why do [French] GP’s prescribe…?
What does it look like? Brand A
What does it look like? Brand B
What does it look like? Drinks and cars
Project Comparative - Outcomes

- Recommendations taken up by the client and the global ad agency including:
  - changes to colourwave, consistent use of a global positioning with its inherent messaging and changes to the attitude of sales reps

 contributed to a cessation of market share loss by brand A
Project Pain

- Studied Osteoarthritis in two countries
- Tasked with exploring osteoarthritis and the everyday issues it poses for sufferers...in detail
Project Pain

- 24 Ethnographic immersions
  - 12 UK
  - 12 USA

- 1-2 days in situ – video and stills + observer notes
  - (when camera switched off or unable to record e.g. supermarkets, swimming pools etc)

- 45 mins IDI at end of immersion

- 7 day diaries from some respondents
Ethnography styles

- Cultural Ethnography
- Netography
- Cognitive ethnography
- Linguistic ethnography
- Visual ethnography
- Setting-focussed
- Object-focussed
- Task-focussed
- Person-focussed
Project Pain

Stairs are a problem... ...for many people...
Project Pain

Stairs are a problem… …for many people…
Project Pain - Outcome

“…we have two different groups researching this problem from two different perspectives. This ethnography has allowed both teams to understand how their efforts are united at the point of patient suffering…the other thing that is happening is that we are able to go to senior management and show them with the video clips exactly what the problem is”

Group Commercial Leader
“This study has given us [MR] a lot of credibility with our medical and R+D colleagues allowing greater commercial discussion during development phases….we have groups of folks meeting today to use the 2 half hour video clips as a stimulus for discussion on re-devising QoL assessment tools….we had an asset go down just after the study and it [the ethnography] along with some other work we did helped senior management decide that this was an area of unmet medical need that still justifies R+D dollars”

Market Research Manager – Medical Needs Assessment Team
Project Pain

• Outcomes
  – Changed the understanding
  – Changed the drug evaluation context
  – Acted as on-going educator
PROJECT SUGAR

type 2 diabetes
### Project Sugar

<table>
<thead>
<tr>
<th>Depth Interviews (219)</th>
<th>Patients</th>
<th>HCPs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PCPs</td>
<td>Specialists</td>
</tr>
<tr>
<td><strong>USA</strong></td>
<td>30</td>
<td>9</td>
</tr>
<tr>
<td><strong>Germany, UK</strong></td>
<td>18</td>
<td>8</td>
</tr>
<tr>
<td><strong>Brazil, France, Spain</strong></td>
<td>18</td>
<td>8</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>120</td>
<td>49</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Focus Groups (16)</th>
<th>Patients</th>
<th>HCPs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PCPs</td>
<td>Specialists</td>
</tr>
<tr>
<td><strong>USA</strong></td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td><strong>Others (per country)</strong></td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>8</td>
<td>8</td>
</tr>
</tbody>
</table>
Project Sugar

- IDIs and Focus groups using the following techniques
  - Word Association
  - Stream of consciousness (Emotion & rational) Discursive
  - Diabetes Diagnosis (Bubble)
  - Diabetes Events
  - Blood sugar not in control (Bubble)
  - Diabetes impact (Box)
  - Soap Opera
    - Current Treatments
    - Diabetic
    - Inhalable Insulin

Current Treatments
- Diabetic
- Inhalable Insulin
Project Sugar – patient types

Strugglers (Depressed)

France - Patient # 10

Her black voluminous box is made of cheap wood. She would like to put it down, it becomes so hard and heavy. Her vision has changed: she didn’t know it was such a big box. A part of it must have been hidden at the beginning.

Germany - Respondent # 1

A package, 50x50cm; she can just about carry it, it is very heavy and she needs both hands; it is black; made of cardboard with a black bow - black, the colour how I feel! It is a heavy burden and I have to carry it all by myself; I would just like to leave it behind; it has been underestimated, has become bigger over the time, was a small parcel in the beginning.

Brazil - IA Respondent # 4

A bomb, can explode at any moment, have to carry the weight for the rest of my life, heavy, black, fearful of an explosion.

Back to the Future
A nice blue cloud, when there is wind, there are more of them, it smells fine like the sun; nice and bad weather in side.

The second example is a trough, 60x60cm, having a comfortable weight, being light brown and made of cedar wood, it is used but not used-up, not old and not new; it has not really changed but lost a bit of colour over the years; it has become more silvery through the sun, like untreated wood which also becomes silvery over the years.

Germany - Respondent # 7
Project Sugar – an HCP profile

Diabetes

Professional, clinical, academic, scientific, distanced, detached

IT

“These are the facts”

Doctor

Paternalistic, patronising, egocentric, assertive, aggressive

ME

"Just do as I say"

YOU

Idealistic, liberal, humanistic, caring, empathetic, sympathetic, emotional

Patient

"I understand – it’s difficult"
Project Sugar – The ‘soap’ emotional map

- Diabetic
- Mr Average
- Class F
- Mr Dependable (The Good Samaritan)
- Class X
- The White Knight
- Class Z
- The Mafioso
- Delivery R
- The Man in Black
- Diabetes
- Everyday working life
- Diet & Exercise
- Body Positive
- Monitoring
- The Busybody
- The Stage Manager
Project Sugar - Outcomes

• Outcomes (more than anticipated)
  – Challenged internal thinking about role and value of the therapeutic class
  – HCP typology/profiling unexpected
  – A theoretical framework for
    ◆ identifying patients who would perform better on this type of drug/delivery system
    ◆ How to communicate better with
      ○ HCPs
      ○ patients
  – Unique emotional positioning options
CONCLUSIONS & SUMMARY
Conclusion

‘You never change things by fighting the existing reality. To change something, build a new model that makes the existing model obsolete.’

R Buckminster Fuller
Summary

• People are complex
  – Responses in research are frequently not what they seem
  – Straight, literal questioning and reporting (alone) is naïve and misleading

• Many ways of entering & decoding their worlds
  – More complex than they seem
  – Need time, study and experience
Summary

• The major myths
  – Face value or beneath the surface?
    ◆ MYTH #1
      ○ Respondents can/do give us a full answer
    ◆ MYTH #2
      ○ Consumers are rational and logical
    ◆ MYTH #3
      ○ HCP respondents are logical and rational
    ◆ MYTH #4
      ○ Asking a rational, evidence-based question is enough
From a distance

“We see the world not as it is, but as we are”
(Anais Nin)