

nfpSynergy Briefing

Using qualitative research to inform the development of communications materials

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Introduction

nfpSynergy is regularly commissioned to conduct communications research for a wide range of our not for profit or public sector clients, and often directly by a creative agency working for a charity. We have seen many times how valuable it can be in helping a campaign to fulfil its potential and ultimately help an organisation to meet its objectives.

In our experience, good communications research respects the expertise and creative instinct of the agency and the client, and seeks to create an environment in which constructive feedback and insight can be solicited from the target audience to ensure the elements of the creative are as relevant and motivating as possible.

Perhaps reflecting the creativity of the process of developing communications, there isn't necessarily a formula for research which can be applied in the same way each time. Each brief will differ according to its own creative objective and the target audience, the point at which it has been decided to commission some research and the wider context of the communications environment.

In this briefing we will offer an explanation of the value of using research when developing communications materials, and outline a framework which can be used to guide the process.

Section 1 – the value of using research when developing communications materials

1.1 What is the value of bringing research into this process?

The role of research is to provide a robust 'testing place' for creative ideas, recognising and respecting that the creative process is just that – it is a creative entity, emerging from the knowledge, experience and instinct from both the organisation and their creative agency. The research should seek to nurture the creative spark and enable the agency to turn it into a successful campaign – it is not intended to dampen or hinder it, or to overshadow the initial creative instinct.

In broad terms, the research process helps the organisation and their creative agency to 'sharpen' the creative expression and messaging of the campaign. It informs the creative development process, through exploration of the key pillars of comprehension, appeal, impact, relevance, motivation, credibility and differentiation. Specific to each campaign, research identifies the most relevant, appealing and motivating proposition and the messages and creative approaches that are working well, less well, and why. Importantly, research examines what actions, if any, respondents would be willing to take as a result of the communication. In terms of the 'bigger picture', an understanding of whether the campaign positively changes perceptions of the organisation and/or helps respondents to understand the work and purpose of the organisation/service will be ascertained. Care should be taken to analyse the findings from the research in the context of the client and creative agency experience and in the wider social and economic context.

Ultimately, researching the creative will help to ensure that both the message, and the way it has been expressed, is motivating for the audience it is intended to reach.

1.2 Methodology

The roles of qualitative and quantitative research

Qualitative research is the most useful method when developing communications materials. The open-ended nature of the conversation allows for the discussion of many different routes and options, and for generating solutions or preferred ideas easily. Quantitative research is used for a different purpose, working with highly finished or clearly defined materials to ascertain preference or responses on a large scale to very specific questions, allowing generalisations to be made with confidence across a target audience. Essentially, qualitative research will be smaller in scale but allow for more breadth of discussion and flexibility of exploration.

Qualitative research - focus groups or in-depth interviews?

The discursive and dynamic nature of focus groups generally makes them the most appropriate format to conduct communications research. The group dynamic facilitates the discussion and also encourages ideas to be bounced around, argued about and developed.

However, if the subject matter is more personal or sensitive; if the target audience has particular needs to be taken into account; or on a practical basis if the sample is dispersed, then in-home in-depth or paired interviews may be more appropriate. From the point of view of considering sensitivity, this better facilitates slightly hidden feelings coming to the surface, gives space for thoughts that participants may not feel comfortable disclosing in a group environment, and allows participants to share their experiences in a personal setting. Research in-home also further adds to the knowledge of the target market, by gaining richness of insight into the context of their environment.

This methodology has worked well for a series of creative development projects we have undertaken for Macmillan Cancer Support.

Case study - Macmillan Cancer Support

Macmillan Cancer Support had identified several key brand challenges:

- To reach more people affected by cancer and increase the take-up of its services
- To broaden and deepen audience understanding of its work
- To deepen emotional engagement with its audience by demonstrating an understanding of what it is like to live with cancer today, where people live longer, may be cured and generally spend less time in the hospital environment

A communications campaign formed a primary part of the solution to these challenges, and through creative development research our challenge was to capture the insights which would ensure that the communications would reflect and resonate with the target audiences experiences of living with cancer.

The sensitive nature of the research topic – talking to people dealing with the physical and emotional trauma of living with a cancer diagnosis – meant that a group format presented considerable risks to the process and to the participants, bearing in mind that not long ago the topic of cancer was relatively taboo. Therefore, in-home in-depth individual interviews were the most suitable format in which to hold these discussions. As well as allowing the research objectives to be met, this method ensured that respondents were not adversely affected by the research process. This format enabled us to treat each respondent as sensitively as possible, giving them time and space to share their perspectives and stories in a personal setting.

The insights we gathered through this methodology enabled us to offer clear direction and guidance about how to resonate with the target audience and reflect their experiences relating to cancer diagnosis, through the vehicle of the advertising proposition and creative concepts. A key insight was how important it was for the campaign to reflect their resilience and the fact that cancer was only one part of their lives. Where the concepts or messages excessively focused on the problems or difficulties of living with cancer they were more likely to be rejected as not reflecting the full picture or as being unconstructive.

Combining focus groups and in-depth interviews

Sometimes a combination of both methods is appropriate – groups may comprise the bulk of the fieldwork with a small amount of supplementary interviews to ensure that all relevant insights and responses have been taken into account. This approach was used to good effect on a project about legacy communications for Save the Children.

Case study – Save the Children

Save the Children wanted to develop a creative communications strategy to sit at the heart of their legacy marketing. Legacies are one of the most important donation mechanisms in the UK, raising over £1.3 billion for good causes each year, thus it is a critical product for any charitable organisation to communicate effectively.

The creative agency developed five concepts for testing among supporters of Save the Children and potential supporters who were open to the idea of leaving a legacy. This was a clear example of a research project which benefitted from both the interactive nature of focus groups and the private space created by in-depth interviews. In addition, focus groups allowed us the opportunity to observe the social component of legacy giving, whilst in-depth interviews reflected the more personal nature of legacy giving. This ensured that no insights were missed which might impact on the development of the campaign, by creating a space in which each participant could talk freely and privately.

The findings showed there were highly positive elements of several routes and we were able to give clear guidance regarding which core messages, creative and tonal approaches were worth retaining, and why. We were also able to identify a set of fundamental principles on which future legacy communications should be based.

Pre-testing and tracking using quantitative research

Whilst this discussion is focusing on qualitative research, quantitative research can be used to great affect both pre and post the launch of a campaign.

Quantitative pre-testing is a tool used to identify which of the ‘finished’ creative ideas may work best in reality, benchmarked against a ‘bank’ of relevant historical scores. In addition, once the campaign has been launched, quantitative research can be used to measure and evaluate the impact of the campaign and the return on investment. Creative development research for Macmillan in 2008 and 2009 has been followed up with an on-going tracking study to measure the impact of the advertising investment.

Case study – Macmillan Cancer Support Ad Tracking

This tracking study is telephone based and includes people who have been diagnosed with cancer, people who have been affected by cancer and a section of the general public within a specific age range. As well as tracking awareness, we explore social attitudes and cross-tabulate for exposure to advertising and advertising messages. From this research we are able to regularly advise Macmillan as to the impact its work has on its brand.

1.3 When is the best time to use research in this process?

Whilst there are ideals, there is no right or wrong answer. Research can be used at any time in the process providing that the context of the project is well understood, and that certain guiding principles for the research are followed. Research can be used as a step-by-step process from the beginning of the creative development to the end, or it can be dropped in at any stage either as a pre-emptive check or even as a reaction or response to issues that may arise during the process.

Using research in this way recognises that the creative process may not be a linear path from initial 'customer' insight to execution but may be circular at times, requiring an element of going back a stage or two in order to keep the overall campaign on track.

Budgets and timeframes are two considerations which can often prohibit research. If neither of these are an issue, an 'ideal' research process might look something like this:

1. Generate insights to aid creative development
2. Concept testing at the outset, helping the agency to select the best concept (or combination of concepts) to work up into different expressions of that concept
3. Testing the different expressions of the concept, to help the agency select the best expression (or combination of expressions) to work up into the final piece
4. Testing the finished product to sense check it will deliver on the campaign objectives

If budget and timing only allow for one stage of research, then arguably commissioning it at the third stage only, testing different expressions of the concept, may be the most effective use of that budget.

A campaign based on a solid foundation of audience insight will go a long way towards contributing to its overall success. If there is any doubt as to the validity of the insights being developed into a creative campaign, use research to check them!

Beginning of the process - generate insights to aid creative development & concept testing

Depending on the organisation's or agency's existing knowledge of the audience, the very first stage could be highly exploratory in nature. The purpose would be to immerse the organisation and agency in their target audience, particularly if conducted in respondents' homes, so that by observing and learning about, for example, their preferences, language, needs and behaviour, the research can help to generate insights on which to build creative concepts – insights which are unlikely to be uncovered without qualitative research. Ideally, research would also be conducted at these early stages to identify the areas or 'territories' in which the brand can legitimately leverage creative communications.

Building on this, concepts can be developed and then tested to identify which concept/s, or which combinations of elements from a number of different concepts, should be worked up into creative expressions.

Middle of the process – testing the different expressions of the concept to work up into the final piece

The objective of the research at this stage would be to test ideas about ways of communicating the message to the audience to identify to what extent the insights they are based on resonate with the target audience.

Taking insights that have been worked up a little into concepts or propositions has immense value in ensuring the communication is on the right track. It doesn't matter if the insights are not yet spot on. Showing stimulus material at this stage, even if it is slightly 'off', gives respondents a framework from which they can articulate why it isn't working, which helps the agency to tweak and refine the proposition and take it to the next stage.

Later in the process - testing the finished product to sense check it will deliver on the campaign objectives

Taking stimulus material into research which is close to the end product allows the communications to be sense-checked by the target audience before the advertising investment has been made. If the research findings highlight any significant issues, they can be addressed and resolved before the campaign goes live. Whilst some additional spend may be incurred 'fixing the problems', at least this is less costly than an entire advertising campaign going to waste, and potentially having a negative impact on the reputation of the organisation or the brand.

With highly finished material, it is a relatively straightforward task to explore systematically the key pillars of creative development, helping to ensure that each area of comprehension, appeal, impact, relevance, motivation and differentiation has been developed to the best it can be given the particular type and format of the creative.

Using research to address a specific issue that arises during the process

Research can also be commissioned and organised at relatively low cost and with a relatively speedy turnaround time to address specific issues. For example, The Salvation Army commissioned research to retrospectively explore the reasons why a TV ad for a Christmas appeal had been successful, in order to understand what hooks to use in new direct mail materials. In this instance, four groups were sufficient to give a steer and provide insights which would inform the development of the creative materials without jeopardising the printing lead times.

Section 2 – Framework for guiding the research process

Whilst accepting that the process may not look the same every time, there are certain guiding principles that should always be followed to help achieve maximum benefit from the research.

2.1 Guiding principles for creative content

Separate the ideas from the creative expressions

It is critical to separate the idea/proposition from the creative expression in the stimulus material, in order to understand the strengths and weaknesses of the propositions and to ensure an idea isn't dismissed simply because respondents did not "warm" to the creative expression. This can be easily done by articulating each idea or core creative thought separately on a stimulus board, as well as the ways in which is it bought to light in any creative materials.

Wide range of creative concepts

To arrive at answers to the big questions in creative development research, it works best if ideas are significantly different to one another. Having established this, it is then possible to test subtle, nuanced differences (for example, straplines that occupy similar territory) and drill down into a greater level of detail. Stretching the boundaries through a wide range of creative executions is also more illuminating for the organisation, facilitating a richer understanding of the territory of the most popular ideas.

Ensure the stimulus material is straightforward and clear

It is necessary to recognise the challenge that respondents face in visualising concepts and therefore the stimulus must work as hard as possible to make their job easier.

Designs for printed advertisements, concepts and mood boards for TV advertisements need to be as clear as possible to ensure the concepts can be easily grasped by the respondent. Stimulus material which is confusing or overly complicated makes it likely that ideas will be rejected.

2.2 Guiding principles for the research process

Participant rather than respondent

In order to facilitate in-depth consideration of each concept or creative execution, we encourage research attendees to act as participants rather than respondents. This means that instead of merely 'draining' respondents of information about their thoughts and reactions, they are involved and engaged to help develop the most appealing creative.

Being clear about the role of the participant

At the same time as respondents are being involved and engaged in the process, they are not expected to generate creative solutions or alternative ideas, or to comment on technical or creative aspects of design or other areas outside of their expertise. It is about ensuring respondents are sufficiently engaged so that they can talk at length about their own personal reactions and feelings about the creative.

If possible, adopt a phased approach to conducting the research

An iterative process can deliver very powerful results. As mentioned previously, there is value in recognising that the idea/creative development process evolves throughout the research. If timeframes allow during a stage of research, mini-debriefs (via email, over the telephone or face to face) at an early stage can provide the agency with the opportunity to develop their ideas in advance of the remaining fieldwork. If timings don't allow, one solution is to provide ongoing feedback on a few key questions following each group or set of interviews. In either instance, we encourage individuals from the organisation and/or agency to attend some of the research to observe reactions and responses first hand, and to be able to act on clear findings more quickly.

Collaboration with the agency and the organisation

In research projects where our relationship is primarily with the organisation, we endeavour to meet with the team at the creative agency to help us fully understand the thinking behind the campaign and the core insights that must be gleaned in the research.

Working closely with both the organisation and the agency whilst the materials are being prepared also gives us an opportunity to find out what elements are 'up for grabs' and which are 'non-negotiable', to avoid spending time in research discussing issues which

can't be influenced. At the same time we would note if there seemed to be a particularly significant barrier or resistance which was worth sharing with the client.

Using the initial research focus groups/interviews as a pilot for the discussion guide and stimulus material

Good stimulus material and discussion guides depend in part on the principles above and the clarity of the research objectives. However, sometimes the only way to be sure that the materials are working is by using them. In this case, it is useful to recognise that the first couple of interviews or groups will to some extent act as a pilot. Allowing a little bit of time between these interviews or groups and the rest of the fieldwork means the guide or stimulus can be adapted accordingly to ensure it is working as well as possible.

2.3 Guiding principles for moderation and analysis

Practical insights & recommendations

Our challenge is to turn the data into practical insights and recommendations which will help to give the campaign the greatest chance of success.

It is not always about 'picking a winner', but often providing guidance about elements of a range of options which are working well, less well, and critically providing the answer as to why this is the case.

Considerations – how to filter and interpret the findings

There are several elements around this kind of research that we bear in mind when moderating the discussion and analysing it afterwards:

- Discussions can become hyper-rational and sometimes divorced from reality
- Respondents can find it easier to point out what's wrong, and can tend to scrutinise concepts they don't like more closely
- Being alert to managing 'ranting' about charities, such as concern about money spent on research or cynicism about the proportion of money which ends up going to the cause, versus advertising spend and the cost of head office
- Respondents may choose a 'winning' idea from a weak selection, when in reality none of the ideas may work
- Research is taking place in the context of the here and now and not the future – it is not possible to predict the impact of future contexts

In our moderation and analysis we focus on:

- Spontaneous reactions
- Comprehension and clarity of message take-out

- Perceptions of tone and use of humour
- Language which gives insight into preconception
- Understanding how the target audience's life experiences or beliefs impact on how they interpret the creative stimulus
- Stereotypes and barriers that must be overcome

We also consider the effect of the order in which the stimulus is shown and any seasonal or event led context which might have an impact on responses. Finally, as mentioned at the beginning, we take care to analyse the findings from the research in the context of the client and creative agency experience and in the wider social and economic context.

Conclusion

It is tempting when thinking about the creative development process and the role of research within that to want to seek a 'pure' process or a formula that can be applied successfully each time.

In reality, each project is unique – the creative itself, the particular messages being communicated, the target audience, the context of those messages, the timings and the budget. There is no 'one size fits all', or one budget fitting all. In some instances two groups may be sufficient, in others it may need to go up to six, eight or more.

When research is commissioned, the process needs to be flexible and adapt to the individual situation, to fit with those particular needs and seek to deliver whatever is required at that particular stage. It is helpful to accept that there may not be a 'pure' linear process. There is an element of placing trust in both the research and the creative process, that with good communication between the stakeholders and research agency and adherence of the guiding principles, it will arrive at an outcome in which the execution is in tune with its audience and on track for delivering against the business objectives.

From our experience it is clear that there is always value in taking materials, in a safe and robust way, to the audience they are intended to reach. Research gives agencies and organisations what can often be a rare opportunity to get closer to their audience, and ground their understanding and knowledge in direct experience. In the best case scenario, it ensures return on investment and facilitates a clear understanding of the factors driving a successful campaign which can be built upon in future campaigns.

If you would like to find out more about how your organisation could use qualitative or quantitative research for communications, please contact Jo (jo.graham@nfpsynergy.net), Michele (michele.madden@nfpsynergy.net) or Patrick (Patrick.brennan@nfpsynergy.net) on 020 7426 8888.