

# COLLEAGUES and FRIENDS

*without Prejudice*

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**Peter:** This is a story of friendship. It is founded on affection, shared interests and shared history. As in all long relationships, however, there is the risk that things we hold true about our friends may no longer be true and, perhaps, were never true. We construct narratives that suit our own purposes and, ultimately, these become prejudices that bias our perspective and lead us to ignore contradictory information.

**Peter and Pat:** It seems undeniable that the relationship between qualitative researchers in the U.S. and the U.K. is colored by several layers of prejudice that underpin the occasional criticisms we make of each other. It seems timely to explore these and see what basis they may have in reality. We are reviewing these from the point of view of two friends with a long history in the profession of qualitative research. We have made the effort to keep in touch with the preoccupations and concerns of researchers in both countries, and we have experience working in both countries. The following polemic is not intended to reinforce the prejudices we observe, but rather to examine them to see if they have basis in current reality.

## THE EVOLVING QUALITATIVE HISTORY

### U.K. Prejudice

**Peter:** In my 30-odd years in this work, the consistent gospel has been that Ernest Dichter was the “Motivational Research” daddy, based in New York, and that his “son and heir” was Bill Schlackman, who brought the discipline to the U.K. The majority of us working in the industry now are, therefore, his direct descendants. (Note how we tend to ignore the contributions of Lazarsfeld and Merton.) A widely held belief among my colleagues has been that European research, partic-

ularly in the U.K., is closer to the founding principles of what is now qualitative research: an industry steeped in creativity, curiosity and intellectual rigour.

By contrast, the myth surrounding the evolution of qualitative research in the U.S. is that after the critiques of the “depth boys” by Vance Packard in his mid-’50s book, *The Hidden Persuaders*, qualitative came under attack in the States in the early 1960s as being too unreliable to be useful. As a result, the business went into decline for a number of years, ultimately rescued by the invention of the focus group, a far more structured (and limited) approach that placed emphasis on reportage rather than interpretation. (It is interesting that Wikipedia reports the term “focus group” as first used by Dichter and not at all pejoratively.)

From this point on, so the story goes, the paths of qualitative research in the U.S. and U.K. diverged. In the U.K., we supposedly developed a humanistic approach that was entirely respondent led and exploratory in nature, emphasizing creative interpretation by the researcher. In the U.S., responding to the newly mistrustful and controlling client, qualitative research was “reinvented” to meet this new client need. Researchers became “moderators,” working in front of mirrors, required to give great “group” (often many per day), with far less focus on back-end analysis and interpretation.

### U.S. Prejudice

**Pat:** It is true that Dr. Dichter was the “Motivational Research” daddy. We in the U.S., however, credit “focused” groups to the Columbia University Bureau of Applied Social Research’s associate director, Robert K. Merton, Ph.D. In 1941, Dr. Merton conducted the first “focused interview” at the behest of his long-time colleague, Paul Lazarsfeld. From this impromptu beginning emerged a manual of interviewing precepts and

guidelines, published later as *The Focused Interview* (Free Press, 1956). Dr. Merton was fêted at a dinner event held by QRCA in 1991 at the Golden Anniversary of the Focus Group. At that event, Dr. Merton spoke at length. As he admitted, “If the marketplace had not been there, the focus group would not have been there; but to confine it to the marketing sphere is to undercut its potentialities.”

The marketplace was there, as was I, in 1963 when many of the leading advertising agencies in New York City opened qualitative research departments. To think qualitative research languished in the U.S. in the 1960s is not to have been there. Market research departments in ad agencies in those years were remarkably large (a high of 72 at Foote, Cone & Belding in the New York office alone), and qualitative research was booming. Some fine advertising came out of those years as a result of qualitative researchers working hand-in-hand with creative teams.

Ultimately in the early ’70s, as U.S. ad agencies downsized dramatically in a tighter economy, their clients began to sponsor research independently for objectives far beyond advertising development in order to uncover consumer attitudes and unmet needs, corporate imagery, product-line potential, etc. In my experience, the quality of qualitative improved significantly when it moved from political pressures on the ad agencies to the deep insights wanted by corporate clients about their consumers. Reportage only supports actionable interpretation and recommendations.

**Peter:** It seems to some U.K. qualitative researchers that the perceived U.S. model of qualitative research has indeed begun to dominate the industry globally, resulting in a yearning for a “golden past,” one that may never have existed. In particular, some aspects of our current working practices come in for criticism.

### Viewing Facilities

**Peter:** The first viewing facilities in the U.K. were based inside U.S. ad agencies. In the '70s, Masius had its goldfish bowl (known to some as the shark tank), and JWT had a converted meeting room for in-house groups at its Berkeley Square offices in London. I believe the first independent viewing facility in London (The Research House) opened during the '80s as a result of its founders having worked in the States. At the time, most fieldwork in the U.K. was held in recruiters' slightly dodgy front rooms, which seemed to work very well for the generally uninformed respondents that we would come across in those days.

There was a time when the U.S.-style facility appeared to differ vastly from the U.K.-style room. American facilities were, it seemed, largely based in impersonal office buildings and looked more like large corporate boardrooms in which participants sat around huge tables. In the U.K., an attempt was made to recreate the living-room conditions that we were used to, as well as to place more emphasis on the comfort of the respondent than on the client.

In my own opinion, shared by other U.K. researchers, this criticism no longer has any validity. Viewing facilities on both sides of the Atlantic have become similar. As Roddy Glen (an eminent U.K. researcher) says: "I don't think respondents are intimidated by 'boardroom' setups nowadays. They may have been when I started in the '70s, but they have seen too many episodes of 'Mad Men' now, and much besides. People like environments that indicate that they are engaging in an important and valued activity."

**Pat:** Mirrored facilities have long been preferred in the U.S. because they provide

a safe and professional working environment for respondents, qualitative practitioners and clients alike. We were happy to let go of clients listening in the kitchen or through scrim in the early '60s of qualitative research on the road. While some viewing facilities also have living-room set-ups, many of us prefer the benefit of a table for stimuli examination or projective exercises. Most facilities have at least one conference room where the table breaks down to accommodate the coziness of mini groups or the intimacy of a one-on-one interview. A table allows tall (and sometimes wide) Americans the discretion of being seated comfortably with legs akimbo under the table.

Another factor is the very large geographic area covered by the States. Most studies involve at least two and even three markets, and flight distances between cities are long. Comfortable back rooms provide a place for clients to relax and chat before the next interview, space for flipcharts for clients to put up sticky notes about their discoveries during active listening, and ledges and ports for plugging in today's ubiquitous devices.

### Recruitment

**Peter:** Many U.K. researchers perceive the U.S. system of putting recruiting in the hands of local viewing facilities as a recipe for disaster. The control resides with the facility owner who, rather than risk losing a project, is likely to be prepared to bend the rules to get the people there. As one colleague put it, "It seems like facilities are doing the recruitment because they have invested in panels (groupies) to come along. Rather mechanistic: you supply a screener, they apply it like a quant, people turn up to a group, questions are asked and answered, and people are paid and leave. It is all a little clinical."

The "clinical" American approach may also be accused of having an impact on incentives. We have had examples cited to us of huge "fees" being paid to participants. Not, you may say, unusual, but it demonstrates the "professionalism" that runs through the U.S. and which, for some of us in the U.K., challenges our traditional love of the "amateur enthusiast."

On the other hand, the traditional U.K. system of using preferred, tried and trusted recruiters in a cottage industry is thought to allow the agency to develop a close relationship with the interviewer, ensuring that the process is personal and tailored to the needs of the project.

In all honesty, there is no perfect solution to this issue. Cynicism about the process and the opportunity to earn extra wages in the form of incentives has created a situation where collusion abounds. Roddy Glen again: "When the U.K. approach works properly, it is excellent. Perhaps it delivers little additional to the 'American' method, except a greater feeling of 'warmth,' essentially a way of pretending that what is happening is not about business and money. When it falls short of this, it is shown up for what it is — a splendid testament to the British love of the amateur, someone who does what they do for the love of it."

**Pat:** In the U.S., the viewing facilities have for many decades been the preferred recruiters. Their databases are constantly refreshed, and a top-notch facility will have more than 100,000 names with contact information in their current database. They are able to slice and dice these by income, age, certain product usage (e.g., presence of kids or pets in the home), occupation and past participation in previous research. They take potential recruits through carefully layered screeners by speaking to them on the phone. In some cases, American QRCs prefer to

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use independent or private recruiters, especially for difficult-to-recruit categories, such as high-level business executives, or for client-provided lists of target physicians.

U.S. qualitative researchers have long been mystified by the U.K. preference for independent recruiters who call on their stable of respondents to be interviewed in the recruiter's home. Despite the regulations and certifications mandated by MRS and supported by AQR, this system seems archaic and ripe for abuse and repetitive participation.

As for high incentives, it is true that the U.S. is less shy about money matters than the U.K. We are a nation of immigrants. There is little inherited wealth here. First- or second- or now third-generation Americans know their worth because they earn their way by their own hard work and ingenuity. Our society is built upon personal accomplishment, where being an "amateur" is not prized. Time is money, simply put.

### Interviewing and Analysis

*Peter:* It is in the actual practice of our work that prejudice truly comes to the fore. In a recent issue of the *International Journal of Market Research*, Roy Langmaid writes in "Working in Depth" of how our industry has been shaped by two tendencies, the U.S. tradition of "scientism" contrasted with European "humanism." In the 1980s, the late Peter Cooper (CRAM) perceived these differences in the two models:

United States	Europe
Object	Subject
Watched	Participant
Standardized	Variable
Representative	Individual

The established belief set is that the American model relies on misguided faith in a measurable, almost quantitative approach to qualitative research, an emphasis on rationality and objectivism and, most important, a literal belief in the data. Once the fieldwork is complete, clients have little need for the researcher's input with regard to analysis and interpretation. The "hearsay" proof thought to confirm this bias is the use of highly detailed discussion guides (including times for each section), the supposed

"debrief" given immediately following the interviews with no time for analysis, and "blind" use of projective and enabling techniques to add interest for the observers of the sessions without support of in-depth interpretation to fur-

ther understanding. Roy Langmaid sees "a preoccupation with structure and bureaucracy in the form of topic guides, detail and the paraphernalia of recruitment, viewing facilities, observing people seen or unseen (that) all contribute to a

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distortion of natural rapport that is then covered up by a pretence that we are all relaxed, being ourselves, answering truthfully.”

Add this to the U.K. perception of some U.S. clients actively discouraging the opportunity for detailed analysis, and no wonder there is a view that many American researchers allow themselves to be stopped from what they do best, agreeing to impossible deadlines without a battle. This impression is summed up by a colleague who states, “U.S. clients do not understand what insight is, and too many U.S. moderators enable this ignorance.”

**Pat:** There is no doubt about it: the U.S. client is engaged by the qualitative research they initiate. They yearn to hear the voices and see the body language of the consumers they want to reach. And, yes, all clients are not angels, particularly when they go abroad and try to control everything out of their U.S. comfort zone.

The view in the U.S., however, is that we welcome clients’ attendance and participation in the back room. Having been there, they are more likely to buy into our strategic recommendations for their brand objectives. They are more likely to feel satisfied that the recruiting is on specification and that they are really getting feedback from their consumers. Having clients in the back room often reveals hidden agendas that have not been previously expressed. We gain more visibility among our end clients at all levels, and we are more likely to be able to answer all of the questions of the research more thoroughly. Playing to an audience does NOT mean bending the findings or playing politics. That is a lose-lose for everyone.

Of course, we are likely to be tired after flying and conducting interviews. The benefits of a preliminary debrief at

the end of a project, however, cannot be underestimated. It is a time to correct any misperceptions that may have happened in the back room and to find out how consumers’ feelings and attitudes compare to expectations held by the client. Asking first, “How does what we have heard today compare to your expectations,” gives us time to take a breath and listen to what the research is really all about. It is always wise to preface our own back-room remarks with, “Of course, I have to delve into this more deeply while writing the report, but a few things do stand out already...” Since most studies require a presentation when the report is completed, in-person or by phone, it is good to know in advance if there are controversies brewing that our written work and final presentation can put to rest. The clients are there, so we do not let them leave without knowing our point of view and any cautionary findings.

As to detailed discussion guides, they represent mutual communication. The clients brief us on their objectives. We return to them a discussion guide that covers the objectives they have expressed, and we add others we think relevant. The guide is not a script but a wish list, internalized by the moderator who proceeds at her/his own pace in intimate conversation with the participants. Projective techniques are used when a sensitive topic calls for them — certainly not for client entertainment, since they often represent “air” time — but for deeper understanding.

### So how much of this is relevant now?

**Peter:** In nearly 20 years of QRCA membership, I have met and worked with great U.S. qualitative researchers who approach projects with imagination, emotional intelligence, creativity and, most

of all, flexibility. At the same time, the U.K. industry has become increasingly process driven. Despite the best efforts of training by the AQR, it is notable that Unilever has recently felt the necessity to roll out their accreditation programme that was started in Asia to both the U.K. and the States. The unsurprising reality is that there is both great and dire work happening in both markets, and there are too few people sufficiently qualified to judge this.

Is there a sound rationale for the prejudice we observe? Well, there seems to be some truth that there are differences in the philosophies of our approaches to qualitative research. But, equally, the British attitude to what is seen as U.S.-style qualitative research may also be a reflection of a snobbish resistance to commercialism on this side of the pond. We may underestimate the importance of meeting the expressed needs of our customers, seeing that as subservient and mindless, while overestimating the obsession with doing things “correctly,” even if that is not what our clients feel they need. This, in turn, potentially leads to a slower changing industry in the U.K. We may feel we perfect innovation in the U.K., but the genesis of much innovation in the research industry is in the States, and we would do well to pay attention to what is happening there.

**Pat:** I have the greatest respect and admiration for the British people, their culture and history. Through AQR and QRCA, I have made lasting friendships with British colleagues. I am impressed by the British emphasis on behavioral economics, and I wonder why this perspective has not taken off in the States. Collaboration with AQR has greatly enriched QRCA, and I believe the reverse is also true. We look forward to many years of learning from each other with openness and without prejudice. 📧