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Introduction and Overview

Advertising, as you've probably noticed, surrounds every facet of your life. Indeed, industry estimates suggest that global advertising expenditures will exceed \$500 billion in 2011, with more than a quarter of that in the United States alone ("GroupM Forecasts," 2010). That translates into millions of ads, all vying for the attention of consumers. In some instances, advertisers are looking for the attention of specific, targeted groups of consumers (e.g., adults aged 25–54 who are liberal, recycle regularly, entertain at least twice a month, and have minimum household incomes of \$75,000). In other instances, targeted audiences may be more general (e.g., working moms). Regardless of the target, marketers have become savvy in using research to create messages that are relevant, timely, and motivating to the audience they want to reach.

And advertising hasn't just grown; the whole concept of what it's good for is changing. Today's emphasis on "branding" has served to heighten the value of advertising. A strong brand is much more than a name that identifies a product. A brand is a concept that exists only in a consumer's mind and is separate from the physical product or company with which it is associated. That concept is made up of a whole web of meanings that are associated with a particular product, company, or service provider and develop over time. Marketers invest in advertising and other forms of marketing communication to build strong brands. The benefits

of a strong brand to a marketer can be consumer loyalty, marketing efficiency, longevity, and profitability.

Think about brands that you, as a consumer, really like. Chances are they have meaning to you in several ways. Maybe they are brands you can count on, brands that make you feel good, brands that remind you of home, brands that make you feel special, or myriad other personal meanings. In some positive way, these brands are relevant to you. Marketing professionals have found that strong, valuable brands have such aforementioned dimensions. For example, Y&R, a major multinational advertising agency, has mapped brands along such dimensions for 20 years using its proprietary tool, the Brand Asset Valuator. Strong brands in the Brand Asset Valuator are those that consumers know well, that consumers feel are particularly relevant to their lives, and that have strong positive affective dimensions (i.e., positive feelings).

This is a book about how to use a particular type of research—qualitative research—to inspire great advertising and build strong brands. Qualitative research refers to “the meanings, concepts, definitions, characteristics, metaphors, symbols, and descriptions of things” (Berg, 1989, p. 2). It is an approach to research that uses a variety of methods and involves an interpretive, naturalistic approach to whatever is the focus of study (Denzin & Lincoln, 1994). Its greatest utility is in discovering underlying meanings and patterns in relationships. The character of qualitative research makes it and its associated methods extremely useful for uncovering complex consumer insights that can lead to successful branding.

We think that qualitative research is the best way to understand how a brand is or isn't relevant to a consumer, how consumers truly feel about brands, and how brands are relevant to the way they live their lives. Concepts such as “relevance” are meaning-based ideas, and meaning is constructed by humans. Take, for example, the letter *T*. To most people, it's an important letter in that constructing a sentence without it would be difficult. (That sentence alone contains 16 *T*s.) But all the authors of this book have some association with the University of Tennessee, and for us, a *T* has some additional meanings: the color orange (the university's signature color), the power *T* (which is always capitalized), the Volunteers (the name associated with most of the university's

athletic programs), technology (the university's e-mail program is called "tmail") . . . and a lot of other stuff. If you're a marketer trying to sell something in Tennessee, you really need to be aware of the meaning of a *T*. And if you wanted to sell something in Texas, *T* would take on whole new meanings (e.g., longhorn cattle, *Friday Night Lights*, etc.). We truly feel that there's no better way to understand the *Ts* of the world than through qualitative research. That's what makes this book important.

In writing this book, we've tried to adopt a consumer perspective, because it's hard to build a brand without consumers. And we're convinced that great advertising comes only from an understanding of consumers' wants and needs. In order to understand those wants and needs, the consumer needs to be consulted and integrated at virtually every step of the research process. In short, the strategies and techniques outlined in this book are based on something called an account planning philosophy. Central to this concept is the idea that in order to understand consumers, you need to understand how they make and interpret meaning and how those meanings are transferred to brands through things such as advertising. We'll talk about this philosophy in just a moment.

We wrote this book for several different audiences. Primarily, account planners will find this book a valuable resource, particularly given the few formal training programs that are offered today. In a national U.S. survey of account planners that we conducted, only 45% of respondents reported that they had received formal on-the-job training (55% didn't receive any formal training), and 95% reported receiving only informal on-the-job training. Fewer than half of respondents reported receiving training in qualitative research methods. The area of qualitative methods was one of the most cited when we asked planners, "In what areas do you feel you need more training?" Yet our survey also uncovered that qualitative methods are commonly used by account planners. Given that account planners are often involved in qualitative research but receive little training in how to use qualitative methods, we saw the need for a book that planners can turn to as they go about the difficult task of trying to develop consumer insights.

Of course, account planners aren't the only ones who might find value in this book. Others who might find this book helpful include research suppliers who, given their relationship with

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account planners, want to understand the role of qualitative research a bit better; advertising agencies, who will find it a useful addition to their reference libraries; and training programs and universities offering classes in advertising.

A BRIEF HISTORY OF ACCOUNT PLANNING

In order to put our later discussions of particular types of research into context, a brief overview of the history and nature of account planning is in order. Account planning was developed in the mid-1960s and can be traced to the U.K. offices of two advertising agencies—J. Walter Thompson and Boase Massimi Pollitt (now BMP DDB; Steel, 1998). Account planning originated from a need to better understand the increasingly complex consumer landscape, synergize research, and bring a consumer focus into the process of message generation.

By the 1960s, society was undergoing great changes, and that meant that the nature of consumerism was also changing. Think about it: Before World War II, women stayed home and cared for their kids, and men headed off to earn the household paycheck. That all changed with World War II. More and more women entered the workplace, and the dynamics of the household—especially with regard to product purchasing—changed dramatically. Instead of cooking meals from scratch and keeping a spotless home, modern working women looked for foods that required little preparation and products that helped cut down on the time it took to clean house. As a result, whole new product categories emerged that catered to the needs of these women. Then the women’s liberation movement changed the landscape even more. Suddenly, advertisers weren’t sure how to speak to modern women.

That’s just one example; we don’t want to give you the idea that account planning grew solely out of the women’s liberation movement. Other cultural changes, such as the leveling of racial attitudes, the growth of technology, the emergence of the credit industry, and the rise of health and fitness concerns, were also occurring. The fact is that the entire social landscape was changing, and the influence on advertising and consumer purchasing habits was dramatic. That’s even truer today, and evidence abounds

showing that consumers don't adopt just one lifestyle or consume products according to a single set of attitudes (Piiro, 1990).

The business landscape of the 1960s was also changing. Parity was becoming evident in many product categories. For example, if you walked down the canned vegetable aisle in a grocery store, you might see three different options for green beans when before there had been only one. As product categories approached parity, the need arose to educate consumers about differences between brands that transcended the product's physical characteristics.

The role of market research also evolved, although not necessarily in a good way. Consumer research was being somewhat diluted across the marketing, advertising, and media research departments of both advertising agencies and clients. The number of independent companies conducting market research (i.e., research suppliers) escalated. These companies specialized in generating and selling information about consumers. One of the biggest purchasers of this information was advertising agencies. As a result, advertising agencies found themselves deluged with information, both from their internal research departments and from new, external agencies. Although this information was useful to ad agencies for learning more about consumers, the surge in available research resulted in agencies being so inundated with data that the account management team—which was in charge of coordinating the agency's efforts—was often not using data in the most efficient manner.

The account team wasn't the only one having trouble processing and using all that research. Lisa Fortini-Campbell (2001) notes that members of creative departments grew resistant to research that they saw as impeding their art. In part, this resistance stemmed from the way research was being used, not from the volume of it. Research was being used to copy test advertisements rather than to develop advertising. So research was being used to correct or shoot down ads that creatives already had invested a substantial amount of time in instead of being used in a diagnostic manner. And when research was used in the early stages of advertising development, it often went no further than the token focus group. Creatives often viewed the research imposed on them—whether from internal or external research factions—as lacking a basic understanding of the consumer and the problem at hand. The deluge of research information, coupled with the misuse of research in the creative process,

meant that agencies were continuing to produce advertising without fully understanding what drove these new, complex consumers and what they needed in a changing marketplace.

Account planning, then, grew out of the changing consumer and business environments, coupled with the advertising agency's need for a single department to assemble and analyze relevant product data holistically and apply it to the day-to-day decision making on an account. In addition, account planning's popularity is attributable to the fact that the presence of an account planning department positions agencies as having exceptional creative solutions and sets them apart from competitors during the all-important stage of pitching new business (Barry, Peterson, & Todd, 1987; Maxwell, Wanta, & Bentley, 2000). Agencies with account planning departments essentially integrate functions formerly conducted by other departments in the agency or by outside market research consultants and seek to add a consumer perspective to all aspects of advertising development. This integration allows agencies to position themselves as strategic partners with their clients and to retain control over business that might otherwise be contracted out to independent research companies.

And so, account planning developed, gained in popularity, and spread to the rest of Europe during the 1970s. In 1982, account planning was "discovered" by Jay Chiat of Chiat/Day and introduced to the United States, where it was widely embraced (Steel, 1998). According to the Account Planning Group U.S. (the APG-US was the original professional association of account planners), by 1995, more than 250 people were employed in account planning in the United States, a figure that grew to more than 1,000 in 1999. While no recent numbers exist as to the current size of the discipline, account planning departments are now fairly common in the U.S. advertising industry. A recent survey of planners identified full-service agencies, creative boutiques, digital and multicultural agencies, and the client side all as places where planners work (LeFevre, Lee, Averell, & Toth, 2010). And planners aren't located only in large cities: Virtually every medium-sized agency and many small ones employ account planners (Nelson & Kent, 1999).

While planning "grew" out of advertising, today, it is used to understand all aspects of a client's business, such as corporate culture, management's values, the meaning of products to the

workers who make them, and other important information that can inform message strategy development. Oftentimes, as a discipline becomes established, traditional job titles are replaced with catchy ones that differentiate one company from another. As a testament that planning has come of age, the title of account planner has evolved; brand strategist, strategic planner, brand planner, and (our favorite) brand anthropologist are all titles an account planner may hold. For simplicity's sake, we're going to refer to these folks throughout this book as account planners.

THE FUNCTION OF PLANNING

What exactly do account planners do? Account planners function as liaisons between the account executive and the creative department, and between the creative department and the consumer. Account planners are both researchers and strategists. In theory, account planners are fully integrated members of the account and creative teams. In practice, the structure of planning across agencies varies somewhat: In some agencies, the planning function leans more toward account management, and in others, planners are considered members of creative departments (Kover & Goldberg, 1995). Nevertheless, it is generally agreed that a planner is a point person in the process of developing message strategy, the

primary contact with the outside world; the person who, through personal background, knowledge of all pertinent information, and overall experience, is able to bring a strong consumer focus to all advertising decisions. (White, 1995, p. 18)

The primary responsibility of planners is to understand the target audience and then represent it throughout the entire campaign development process. In fact, account planners work so closely with the target audiences they study that they are often referred to as "consumer advocates" (Kover, James, & Sonner, 1997). This intensive interaction with consumers and creative strategy development distinguishes account planners from more traditional market researchers (Barry et al., 1987; Capon & Scammon, 1979).

In fact, in addition to the other titles we identified, account planners are also known as creative researchers or strategic researchers.

Account planners attempt to understand and represent the target audience through the use of market and research data in areas such as the product, the category, the market, the competition, and the client. The understanding that flows from the research that account planners conduct leads to usable insights that can help creative and account management teams produce communication campaigns that are relevant to the target market. Effective consumer insights elicit reactions that motivate consumers to try to continue buying a product.

THE ROLE OF RESEARCH IN THE DAY-TO-DAY ACTIVITIES OF ACCOUNT PLANNERS

Account planners use a variety of research techniques to identify and understand consumer insights. In this capacity, they rely heavily on qualitative research, which provides the opportunity for intimate consumer contact in a less structured environment and allows for insight into the more emotional aspects of a brand. These techniques include traditional approaches, such as one-on-one interviewing and focus groups, as well as more innovative approaches, such as accompanied shopping, word associations, use of facilitation devices, video montages, projective techniques, and consumer diaries. The use of experts (e.g., key informants, semioticians, ethnographers, and cultural anthropologists) is also common; although these people might not work in market research, they often offer unique insights into a particular consumer situation. Account planners also track data from long-term studies on social and cultural changes that may be linked to advertising success. They are skilled at identifying and keeping abreast of trends related to a client's business. While doing their jobs, they conduct primary research and utilize secondary research sources such as published market reports, usage and attitude surveys, and awareness tracking studies.

The variety of research techniques used by account planners suggests two things. First, no single research technique can do everything; recognizing the advantages and disadvantages of each

method is important. All sources of information are valuable, but they are also flawed because they are limited in scope and seldom yield the total answer to a given problem. Knowledge of the various research approaches is necessary to understand the scope of a consumer's personal experience and neutralize biases ("Healthy Research," 1982). Although we know that planners rely primarily on interviews and focus groups, smart planners know these approaches won't always yield the information they are trying to uncover. In fact, a few years back, at the annual convention of a planning association, several of the topics discussed dealt with the overuse of focus groups, the gist of the idea being that planners were using these groups without really considering whether they were the best way to tap into consumer insights.

Second, planners must be familiar with alternative research methods so they can intelligently evaluate the array of research options available to them. It is important to remember that qualitative research is not synonymous with just focus groups. Innovation, in the life of a planner, means finding the best and most appropriate way of talking to consumers, one that will yield the information that will lead to a great creative strategy. Often, that means much more than conducting focus groups or interviews. The number of new research techniques on the market is startling, and planners must be able to make cogent choices among varying options as they go about the important business of uncovering consumer insights. We hope this book will help you make these choices.

Although many of the techniques used by account planners are similar to those used by other research functions in an agency, account planning differs from more traditional research in that the research incorporated becomes part of the process instead of being used in an advisory or evaluative capacity. In this way, the account planner brings consumers into the process of creating a campaign and gives them a voice (hence the "consumer advocate" label planners sometimes have). For example, though more traditional research can produce consumer insights, an account planner takes these consumer insights, interprets them, and advises the creative team about how they can be used to develop creative strategy. In essence, the research used by account planners is more focused and integral to problem solving than is the case with traditional research, and the ability of planners to contribute intelligent

insights to their findings determines whether they are full partners in the creative process. As part of a team that works closely together, planners often find they are aided in their interpretations of data by input from account managers, creatives, clients, or agency management.

Although this book focuses on using qualitative research in an innovative manner to develop creative strategies, you need to know that innovation doesn't end with simply being research savvy. Innovation also means being alert and aware of your research surroundings so that you can make connections between seemingly unconnected things. These are the types of connections that help you uncover the consumer insights that lead to great advertising.

STAGES OF ACCOUNT PLANNING

Account planning is aimed at generating consumer insights during two key phases of the campaign process: brand/creative strategy development and evaluation of campaign effectiveness. Lisa Fortini-Campbell (2001), in her book about generating consumer insights, *Hitting the Sweet Spot*, further divides the brand/creative strategy development stage into the following stages: (a) discovering/defining the advertising task, (b) preparing the creative brief, (c) developing the creative, and (d) presenting the advertising to the client. The techniques discussed in other chapters of this book have differing degrees of utility depending on the stage of account planning. In advance of these chapters, it is important to differentiate what happens at each stage.

Brand/strategy development is the main aspect of a planner's job because it lays the groundwork for creative executions that effectively communicate to consumers in a way that is relevant and meaningful. Fortini-Campbell (2001) notes that a planner must first gather and assimilate information about consumers and their environment from every source available. She mentions the importance of reviewing such things as secondary research and sales data and of conducting primary research to find out everything possible about the environment the product inhabits. Pam Scott (1999), a leader in the field of account planning, notes that

the target market's relationship with the product, the brand, the product category, and any cultural influences must all be considered prior to determining creative strategy. Research at this point is imperative in order to discover what communication needs to occur with consumers: One must know the problem before one can diagnose and treat it.

After research has been conducted, a planner must assemble, organize, and interpret it in such a way that consumer insights are highlighted and extraneous information not important to developing strategy is culled. To streamline this process, the planner prepares a creative brief. The purpose of the brief is to help guide the creative team as it conceptualizes advertising strategy designed to meet the objectives of the campaign. Scott (1999) notes that possible components of a creative brief focus on answers to the following questions: Why is the product being advertised? What is the advertising supposed to do? Who is the target market? What is known about the target market that will help with the advertising? What is the main thought that needs to be expressed? What are possible ways to communicate the main thought in the advertising?

It is also important to note that the creative brief is more than just the answers to these questions. According to Steel (1998), a brief is an ad to influence the creative team. Along this line, Scott (1999) notes that the brief should tell a story about the product's target audience but that a planner must keep in mind that the real target audience for the creative brief is the people who will read and use it, namely, the creative team. She recommends the use of humor, stories, and anecdotes designed to inspire the creative team and delivered in an innovative manner.

Once the brief has been delivered to the creative team, rough versions of the advertisements can be prepared. But the planner's job does not end with simply delivering the brief. As advertisements are developed, the planner's function at this stage is to verify with the target market that ads and other communication tactics are relevant and effective. All good advertising and communications campaigns begin with clearly set objectives; to be considered successful, the campaign must meet these objectives. While consumers are fickle and no advertising is a sure bet, practitioners and clients want as much of a guarantee as is possible to ensure that the message strategy of a campaign is on target.

Hence, the planner tests rough versions of ads against the target market. In evaluating the creative with the target, a planner might conduct group or one-on-one interviews with consumers in order to check that the advertisements are actually articulating the message strategy and are on track to reach the goals of the campaign. During these interviews, rough or “comp” versions of the ads are shown to participants, followed by intensive questioning on the part of the planner. It’s worth noting that although this discussion of evaluation has focused on evaluating the creative in rough or comp forms, planners also evaluate the consumer’s response to the campaign during and after its run. According to Douglas Atkin (1997), a noted figure in the field of account planning, “planners’ ultimate responsibility is accountability for effectiveness” (p. 34).

Account planners are also often involved in presenting advertisements to potential or existing clients. Fortini-Campbell (2001) notes that at this stage, the planner represents the consumer’s point of view and helps explain how the advertisements under consideration are in line with the campaign strategy. Planners also offer the client insights concerning how the campaign will perform with the target audience once it has been executed. It’s worth mentioning here that the presence of an account planner at a business pitch for a new account often results in the agency winning the account.

EXAMPLES

To get an idea of the importance of conducting research prior to developing brand/creative strategy, one needs only to look at some case histories of clients who have benefited from the insights uncovered by planning. In recent years, awards specifically aimed at recognizing the role of account planning have been established. In the United States, these awards started with the Account Planning Group (i.e., APG-US). This organization was subsumed by the American Association of Advertising Agencies (4A’s), which oversees an annual competition expressly for account planners. Awards are given on the basis of insight, creativity, and effectiveness. In selecting finalists for the awards, judges consider the business background of the product or service for which the campaign was designed, the communication objectives of the campaign,

descriptions of brand and consumer insights that have been developed, and explanations of the creative strategy and guidelines for campaign evaluation. Several high-profile campaigns have earned the attention of the APG-US based on the contribution of account planning to the final marketing solution.

MoneyGram

If you've ever sent someone money electronically, you know that your options are limited to a couple of companies that do business in this category. The best known of these is Western Union, which in the 1990s enjoyed an 80% market share and outspent its major competitor, MoneyGram, three to one on advertising. Western Union also had twice as many locations as MoneyGram and an incredible 99% awareness level among consumers (compared with MoneyGram's 60% awareness; "Campbell Mithun Esty: MoneyGram," 1999).

Even though MoneyGram's sales had been declining for more than 2 years, it did have one advantage over Western Union: MoneyGram's service was cheaper than comparable service from Western Union. And MoneyGram's price included a free phone card and 10-word message to the recipient of the money transfer. However, while price was important to the target audience for the brand, on the surface, it didn't lend itself well to forming the basis of the brand's image.

The advertising agency Campbell Mithun Esty (CME) faced the challenge of transforming MoneyGram's price advantage from a product feature into a brand image. Planners from the agency went to urban neighborhoods to talk to MoneyGram's primary target market: African American women. Taking an ethnographic approach, they sought to understand these women's lives and to gain insight into their experiences with electronic money transfers and their feelings about Western Union and MoneyGram.

Several key findings emerged from their research. First, these women felt taken advantage of. This was true of their general feeling toward life as well as their wire transfer experiences. These women took care of those around them, but they sometimes couldn't help but feel a bit resentful about it. In helping their family

and friends by wiring money, they were, in essence, giving away their hard-earned cash. And they had to pay a fee to do so! So it's no wonder that the women saw themselves as "givers" and wire transfers as "takers." This was particularly the view they held of Western Union, the category dominator. The same sentiments were voiced over and over by the target market.

It was the insight that the target market felt taken advantage of that formed the basis for the subsequent advertising that CME developed. The basis of the strategy was to make MoneyGram's cost advantage synonymous with giving back to these women. This was a strategy that worked on both rational (i.e., the cost savings) and emotional (i.e., giving as opposed to taking) levels. The executions featured a grandmotherly character who gave advice and looked out for the women in the target. This approach was supplemented by a donation program for a group with which the target market was familiar: the Boys & Girls Clubs of America. Both qualitative and quantitative measures were used to track the success of the campaign, which resulted in a sales growth for MoneyGram after only 2 months.

De Beers Group Marketing

Account planning is also good at identifying cultural idiosyncracies that can jeopardize a client's chance at success. Such was the case for JWT Mumbai, whose client De Beers Group Marketing wanted to break into the Indian market for weddings ("JWT Mumbai," 2008). De Beers is primarily known as a company that sells diamonds, and while it was the No. 1 diamond company in the United States, it faced several obstacles in India. The first was that India is a conservative country where personal choice takes a back seat to tradition. Second, Indian tradition calls for gold—not diamonds—as the adornment of choice for a bride. This had been the case for centuries. The challenge for JWT Mumbai was to change this mind-set and create a preference for diamond jewelry.

To better understand the market, JWT commissioned a usage and attitude survey. Going into the project, the agency was under the assumption that parents were the decision makers when it came to weddings, since they traditionally foot the bill. But the

survey revealed that the bride herself had as much say about wedding jewelry as her mother. Other trends supported this finding; engagements were becoming longer, brides were taking a more active role in planning their weddings, and females engaged to be married were becoming much more comfortable with their future in-laws. And, most importantly, brides viewed diamonds as contemporary and stylish.

JWT planners next used qualitative research, namely, focus groups and elicitation devices, to determine whether the trend data was accurate. They verified that brides who wore a lot of gold jewelry were perceived as traditional, obedient, and meek. The bride who wore traditional attire (gold) was seen as doing the right thing and not necessarily having the wedding she wanted. “Diamond Brides,” however, were seen as elegant, extroverted, and confident. Diamonds signified high status, a sense of personal style, and an aspect of casual informality that didn’t carry the stressful baggage of tradition. Planners determined that most Indian brides weren’t happy on their wedding days (too much stress from having to keep up with traditional expectations), but diamonds represented a way for a bride to have a voice and enjoy her special day. This was attractive to younger Indian females.

As a result of its research, the JWT team developed the concept of the “Diamond Bride.” These were happy brides who rejoiced in their weddings while maintaining some measure of personal independence. The creative idea presented diamonds as the stone for brides who had spark. The ads themselves delivered on this idea, showing brides who reveled in their big days, wearing diamonds and bestowing kisses on their new husbands (kissing between newly married couples was not a tradition in Indian culture). The product figured prominently in the celebration and, as such, was legitimized by the advertising. The creative was executed through short films, TV infomercials, advertorials in magazines, and public relations. In a particularly innovative tactic, India’s three top fashion designers provided their own interpretations of the Diamond Bride. The result? The overall market for diamond jewelry grew more than 20%, and the market for diamond jewelry designed specifically for weddings increased more than 30%. Most importantly, planning was useful in identifying a situation and mining insights that provoked a cultural shift.

Yoo-Hoo Chocolate Drink

Yoo-hoo chocolate drink had long been suffering from declining sales when it hired the Mad Dogs & Englishmen agency. Quantitative research already had indicated that the brand was seen as old-fashioned, boring, and “not for me.” Yoo-hoo is considered part of the soft drink and beverage category, and other drinks in the category (such as Sprite or Minute Maid Juice) were seen as more hip to drink. Moreover, in interviews with mothers (the obvious target market because they generally buy soft drinks for their children), it was found that they would buy the drink for their younger children but not for their teenage children. Teenagers, especially boys, believed that Yoo-hoo was an old-fashioned drink for their little brothers and sisters, not something “adult.” Because teenagers consume more soft drinks than any other group, this was a major hurdle and one that needed to be overcome to get the brand back on track. Hence, Mad Dogs & Englishmen’s initial recommendation was that Yoo-hoo target teenagers, not their moms (“Mad Dogs & Englishmen: Yoo-hoo Chocolate Drink,” 1999).

Mad Dogs & Englishmen’s account planning team turned to the Internet for some preliminary research and found that some teenage boys had created webpages glorifying Yoo-hoo. The content of these pages paid homage to Yoo-hoo through such things as testimonials and photo collages. The pages revealed that for these teens, Yoo-hoo represented goodness and the ability to make things right, a calming presence that was in contrast to the edgier advertising messages of more popular soft drinks. Though this web group was small and not representative of how most teens viewed Yoo-hoo, it did give the account planning team an idea of how to position the brand against larger competitors. The insight resulted in the facetious but charming strategy that “Unlike other drinks, Yoo-hoo makes a bad situation better.” The sheer irony of the strategy and the joke behind it was a compelling message for teens. The campaign executions showed teens in everyday situations in which the purchase of Yoo-hoo made things better while its absence made things worse. All included the tagline, “Yoo-hoo chocolate drink. Buy any other beverage and you could be making a terrible mistake.” As a result of the advertising, the brand’s sales decline reversed and its distribution strengthened. Campaign

evaluations concluded that the ads were functioning just as the strategy intended.

These are three examples of how research conducted by account planners was used to develop creative strategy leading to successful advertising campaigns. Other notable campaigns in which account planning played a key role include Volkswagen's "Drivers Wanted" campaign, for which planners used one-on-one interviews and focus groups to develop the brand essence of the automobile manufacturer; Norwegian Cruise Line's "It's Different Out Here" campaign, where planners concept tested the main idea through the use of an idea video; and Florida's Anti-Tobacco campaign (which later was rolled out nationally), for which members of the agency team conducted ethnographic and observational research to develop the award-winning "Truth" campaign.

ACCOUNT PLANNING AS PART OF THE OVERALL MARKETING EFFORT

Although the emphasis in this book is on how to use qualitative research to create great advertising, it's important to note that advertising does not exist in a vacuum in today's complex marketing environment. Instead, it plays one role in an often bewildering combination of advertising, sales promotion, public relations, and personal selling. In other words, advertising functions as just one part of the promotion P—the communication mix—that your marketing teacher always talked about when she was discussing the four Ps of marketing (product, price, place, and promotion). To explain this complex promotional recipe, marketers and academics coined the phrase "integrated marketing communications," or IMC. Essentially, the idea behind IMC is that a company speaks to its various publics with a singular voice, one that's closely tied to a brand's identity. In practice, this means that all forms of communication are conveying the same message or image. This consistent messaging leads to a brand personality and helps grow the equity, or value, of a brand. Brand equity, especially in categories with a lot of parity, can mean the difference between a product's success and failure.

The concept of IMC suggests that the strategies and techniques used in account planning extend beyond advertising. Account

planning is primarily focused on improving the creative product, but insights generated from planning research can also improve or inform other areas of business strategy. Indeed, for more than a decade, planning's professional associations have been emphasizing the need for it to be integrated into all aspects of the marketing mix: product, price, place, and promotion. And this makes sense: You wouldn't want your advertising centered on building long-term equity in a brand while your sales promotion efforts tell consumers that there's always a coupon available in the Sunday newspaper for 50 cents off the brand. These two things are at odds with each other; while your advertising may be building brand equity, your sales promotion is diluting your brand equity by telling the consumer that your product is always for sale and not worth its full price. Don't get us wrong, we've got nothing against sales promotions; we just want you to really think about what these things say to consumers and the impact they have. Similarly, if your brand's Facebook page gives off a free-form, Grateful Dead sort of vibe but its Twitter account shrieks bluegrass, that's a disconnect. And consumers, astute as they are, notice these differences and become confused.

Unfortunately, it appears that account planning is not as integrated into the marketing process as it might be. A national U.S. survey of account planners that we conducted suggests that although more than 80% of account planners are "very involved" in brand strategy and creative strategy development, less than 6% indicated a high level of involvement in any of the following areas: media strategy development, public relations strategy development, or sales promotion strategy development. We hope that as you read this book, you'll see some areas where the strategies and techniques we describe can be applied to communications campaigns that go beyond traditional advertising.

ORGANIZATION OF THIS BOOK

This chapter serves as an introduction to this book and lays the foundation for explaining the perspective from which we're writing. Below, we briefly discuss what's in store for you in the remaining chapters.

In Chapter 2, we give you an overview of the theory behind qualitative research. We're operating here on the premise that you must understand the underpinnings of qualitative research before you can use it successfully. After all, there are many different research approaches, and it's important for you to decide which approach is the best for getting at what you want to know. Quantitative methods, such as phone surveys, are often used quite successfully in advertising, as are methods such as one-on-one interviews or accompanied shopping. The key to using any research method correctly is knowing its appropriateness for a given situation. We hope our theoretical discussion of qualitative research will help give you an idea of when certain techniques are or are not appropriate.

Chapter 3 deals with ethnographies and other extended-contact methods. We've written this chapter with the following in mind: The best way to get to know a market is to live with that market. Ethnographic and other extended-contact qualitative methods allow researchers to come as close as possible to living with a consumer group by researching that group in its natural setting. However, these methods often require a large time investment. This chapter explores these methods and presents examples of how to conduct such extended-contact research projects as efficiently as possible. Examples illustrating how ethnographic methods have been successfully applied to account planning are incorporated to make the techniques more relevant to planners. The methods explored include ethnography, accompanied shopping, and panel studies with consumers, along with some case studies that illustrate how these techniques have been successfully used in the past. We've also included a discussion on the ethics associated with this type of research.

Our research with account planners suggests that interviewing is their most often used and most valued technique. That's why we spend a lot of time in this book talking about interviewing techniques and how to get the most out of an interview. In Chapter 4, we discuss in great detail interviewing and its utility for account planning. We've also provided a sample transcript from an interview and ideas for how you should approach its analysis.

Account planners have been characterized as creative researchers. They have earned this label because their contributions help

generate messages that are creative and resonate with the intended market. The label “creative researcher” also comes from the innovative research techniques used by planners to uncover consumer insights. In Chapter 5, we examine projective and elicitation techniques that may be used by planners to help generate insights into consumer behavior. We give you an overview of the history of projective techniques along with their evolution as tools for market research. Descriptions of some of these techniques, as well as examples of how they can be used by account planners, are provided. These techniques include associations, completions, constructions, expressions, and perceptual mapping. Specific examples, such as the use of role playing, sentence completion, collage building, and other visual prompts (e.g., bubble mapping or games such as “The House Where the Brand Lives”) are also provided.

The Internet can be a powerful tool for uncovering consumer insights. Chapter 6 examines how account planners can use the resources and power of the Internet to conduct qualitative research for communication campaigns. The chapter begins with a short history of the Internet as a communications tool and provides an overview of ways the Internet has been used to collect both quantitative and qualitative information. The main focus of the chapter is on describing how the Internet can be used to conduct interviews and online focus groups. We describe the benefits and limitations of both of these methods and also offer tips on how to encourage participation and candidness. Examples are included to illustrate the value of online interviewing for planners. We’ve also included a discussion of the ethical considerations of doing online qualitative research, including assessments of participant risk, the appropriateness of topics, and obtaining informed consent.

You’ve done all the research and uncovered some remarkable things. Now, the question is, how do you present the material in a way that will inspire the creative team? Chapter 7 covers two important tasks in the job of an account planner: writing the creative brief and bringing research to life. First, we discuss how account planners can create the most effective written briefs possible. An overriding theme of this section is the use of the creative brief to open creative doors, not close them. The importance of the creative brief is discussed, and we give you an overview of the different types of formats used for developing written briefs. We also address how to fine-tune

the brief based on your personal knowledge and your relationship with the creative team. Topics addressed include interpreting the research results in the brief, partnering with creatives to develop briefs, writing a brief that connects with creatives, maintaining focus in the brief, finding trigger words, and allowing for flexibility.

Inspiring research can't inspire if it's not presented in a way that makes the results come to life for the strategy team. Chapter 7 also talks about ways to bring to life key insights from research by exploring how to present research in a way that allows consumers' voices to be heard. Specifically, in addition to numbers, it explores the use of pictures, video, audio, and computer-related technologies to help the creative team hear the consumer in ways that generally do not happen in traditional research presentations.

Throughout the chapters, we explore how best to use and present qualitative research to generate advertising that is creative and resonates with the intended market. In day-to-day business, however, these ideals must often be balanced with real constraints. Chapter 8 deals with some of these constraints and suggests ways to get the most out of research, given different situations. We talk about things such as the pricing of qualitative research, establishing an appropriate timetable for fielding qualitative research, working with data collection teams or field research companies, meeting the expectations of quantitatively oriented management while still getting rich insight, and avoiding the demands of instant analysis.

In Chapter 9, we explore issues associated with evaluating the work of account planners. We discuss the pressure of demonstrating planning's return on investment in a campaign and present various techniques associated with campaign evaluation. In our "parting thoughts" section, we try to inspire you to use the methods we discuss in this book. We use the metaphor of a toolbox to get you excited about actually using the qualitative tools we've talked about, and we talk about being innovative and looking for problems to which you can apply a new research method (providing it's appropriate). We also give you some parting thoughts on the value of teamwork in conducting research and leave you with a brief discussion of how many of the qualitative research methods you'll read about can be used easily to solve a variety of marketing problems. Let's begin.