••• qualitative research

# Getting in the game

## New ways of gamifying qualitative research

| By Susan Fader

### snapshot

The author explores ways to add fun and competitive elements to qualitative projects to enrich the process for everyone involved.

As detailed in articles in *Quirk's* and elsewhere, Jon Puleston of GMI has done extensive work to integrate gamification into online quantitative research. Can his work and that of others who champion the addition of game-like elements to marketing research provide new ways of thinking about qualitative? We think so.

While many qualitative researchers point to the projective techniques that have long been used during focus groups (or IDIs or phone interviews or even online focus groups) as proof that game-like elements are already present in qualitative research, more can be done.

Gamification in qualitative research does not have to focus exclusively on personification techniques or even on techniques only used during the research session. Participant interaction with a qualitative research study can begin before the session begins, so why wait until the discussion starts to begin the game?

We have a number of suggestions for how to get things going sooner that we have successfully integrated into qualitative research we have fielded with different demographics both in and outside the U.S. These techniques not only make the research fun for the participants but can also ignite excitement in the recruiters, clients and us as qualitative researchers.

### Recruiting process

In order to identify and qualify the "right" participants, we have to ask questions. But the traditional method of using a laundry-list of forced-choice questions, with multiple answers that need to be rated on scales, can be tedious for both the person being screened and the recruiter, which can negatively impact the quality of the recruit.

Puleston has talked about personalizing and emotionalizing questions for online surveys and we can do the same in qualitative research screening. It can help make the recruiting process more interesting for the prospective participant and the recruiter. It also can help the client with open-ended feedback and the moderator with personal insights into who will be in the group. Gamification can help transform a difficult screening process into one that ener-

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gizes participants and makes them look forward to the research.

For example, for a study on sexually-transmitted diseases (STDs) we added gamification techniques to a recruiting screener where we needed to recruit many different demographics (ages 18-49) across a spectrum of sexual orientations, behaviors, condom usage, number of sexual partners and types of STDs.

Using gamification helped address some major concerns in designing the study:

• How do you get people comfortable answering explicit questions (and giving truthful answers) about their sexual behavior, history and orientation to a stranger on the phone?
• How do you structure the screener to minimize the number of refusals and drop-outs during screening?
• How do you make the recruiter (who is asking the questions) not only comfortable with asking the questions but also make this a study they want to work on?
• How do you ensure that the people who are being recruited will be comfortable during a group discussion versus the more anonymous environment of answering questions over the phone?

We addressed all these concerns by integrating gamification techniques at both the beginning and end of the recruiting screener. At the beginning, we laid out the ground rules, as one might with a game, inviting them to participate along with others and telling them what they would "win" if they qualified.

**Clearly explain the rules.** If people know up front the topic that the questions will cover it will help mentally prepare them, especially when the questions are so personal.

**Get buy-in.** Let the participants know that they will be part of a group who have been asked the same questions and then have them confirm they would be comfortable answering the questions prior to asking any of the difficult/explicit questions.

**Reward.** Most recruiting screeners do not tell the person what they will be paid until after they are qualified but for some studies where the recruiters may encounter a high refusal rate, this

will pique interest and increase comfort in answering the questions.

An example of our introduction is below:

Hello, I'm _____ from Fader and Associates, a market research company. We're conducting a study among the general public and would like to ask you a few questions. If you qualify for the study, you along with nine other people will be invited to participate in a two-hour focus group, where you will be paid at least $125. Our questions may be personal in nature, touching upon your sexual behaviors and attitudes. Please be reassured that your answers will be kept strictly confidential. Do you feel comfortable and willing to continue with this interview to see if you qualify for the focus group?

Then, while not a gamification technique, we also restructured the typical order of the recruiting screener to get people comfortable answering questions prior to asking the explicit sexual questions. So at the beginning of the screener, we asked the demographic questions that are generally asked at the end of the screening. Then the last two questions were structured to ensure we had people who would be comfortable being part of the group discussion about sexual behavior.

We didn't use the usual attitudinal grid approach. Instead we used the personalization and emotionalization approach with these two open-ended questions:

Please tell me the story of how you lost your virginity. [NEED DETAILED ANSWER. A COUPLE OF WORDS IS NOT ENOUGH.]

How has your attitude toward sex changed over the years? [NEED DETAILED ANSWER. A MINIMUM OF 2-3 SENTENCES.]

Adding these questions was something that the recruiters initially felt would make the recruiting very difficult but instead, as one recruiter said, "They were so comfortable answering the question, I couldn't get them to stop talking."

These questions let us know if the person would be comfortable in a two-hour discussion about sexual behavior, choices and attitudes and became a springboard for the people in the group to really feel comfortable sharing some amazing stories during the group discussion. For example, one of the women, who answered the question on the recruiting screener by saying said she had lost her virginity to a "friend" but didn't go into much detail on the phone, opened up during the discussion. It

turned out that she had been drugged and raped by a trusted male friend. She said she had tried to tell her mother right after it happened but her mother refused to listen so she never told anyone the details. But she felt comfortable, through her tears, speaking to the group. The energy from this revelation spilled over into the rest of the group discussion, encouraging the women to be extremely focused on the positioning ideas that were discussed later.

### Early-bird drawing
As another example, we have added an early-bird drawing to many of our projects. We tell respondents the details of the drawing after they have gone through the recruiting process and have qualified for the study.

The early-bird drawing has these game-like elements:

**Game of chance.** Through a drawing, the participant has a chance to win an additional $50. This ensures early/on-time arrival to the group.

**Competition.** They will vie with eight other people for the chance to win the $50, which connects with people's competitive natures. By stating the odds of winning, which are relatively high, you increase interest in "playing" (i.e., answering screening questions).

An example of our wording:

There will be nine people in your group discussion. In addition to the $125 we will pay you for participating in the group discussion, anyone who arrives at [name of facility] and signs in by 9:45 a.m. for the 10 a.m. group will be entered in an early-bird drawing for a chance to win an additional $50.

Since we have added the early-bird drawing, we have been able to start almost every group at least five-to-10 minutes before the scheduled start time. In fact, for a recent study on a financial Web site, all the respondents showed up at least 20-25 minutes before the official start of the group, which is especially helpful when you have a jam-packed moderator's guide and could use some extra time for the discussion.

One more note about the early-bird drawing: to ensure no one during the group is disappointed that they lost the drawing, we tell them who won at the end of the group. Because the group has generally bonded well during the focus group discussion, there is much less

disappointment if they didn't win since "someone they know" has won.

## Signing-in at focus group facility

Many times the sign-in process for a focus group can make the person coming to the group feel like they're back in school or awaiting sentencing, which is definitely the opposite of how you feel when you're excited to play a game. You want to create an environment where a person is looking forward to the discussion, just as a person who is about to play a game looks forward to doing so. Therefore, banish the following common sign-in practices, which make people feel uncomfortable and cause them to question why they agreed to participate in the research:

**Don't: Tell the person where they have to sit in the waiting room.**

**Do: Let person choose where to sit.**

Many focus group facilities place a person's name tag on a seat in the waiting room and instruct them to sit in that seat. They are not allowed to choose. Most people have a strong opinion on where they will feel most comfortable and by not allowing them to choose a seat, you create a situation, even before the research begins, where they are made uncomfortable.

**Don't: Assume the name on the summary sheets is correct.**

**Do: Ask the person if the name on the tent card is the correct version of the name they want to use and if it is spelled correctly.**

If you can't get a person's name right, then you are giving them permission to be lax in how they pay attention and what they say during the group. Once you start double-checking that you are using the correct spelling of the name they want to be called, you will discover it is not that uncommon to have someone's name spelled incorrectly or that their given name is not the name they use (i.e., Jonathan on the tent card but they go by their nickname of Chip). Hardly anyone ever volunteers that his/her name is the wrong version or is spelled incorrectly. They just sit there feeling off-center because you are calling them by the name their mother only used when they were in trouble.

**Don't: Have the moderator refrain from talking to the people in the waiting room.**

**Do: Have the moderator talk one-on-one with each person and also to the group in the waiting room prior to the start of the discussion.**

It can't be reiterated enough that a very important component of adding game-like elements to qualitative involves making sure that people know the rules (what is expected of them) and creating an environment where they look forward to participating in the discussion. People sitting in a waiting room are by nature curious about who else will be in the group. They look around and remember the sometimes strange and embarrassing questions they were asked during recruiting and wonder if everyone else answered the same way or if they're the only one with $10,000 worth of credit card debt.

A moderator who talks with the people in the waiting room is creating a more welcoming environment than a moderator who is first seen sitting at the head of a conference table as the facility host brings the people into the focus group room. In other words, if you tell them up front in the waiting room, before the group officially begins, what they all have in common is that they have had credit card debt of at least $10,000 for the last two years, you put people at ease and help them bond as a group, even before they enter the focus group room, because now they know everyone is in the same boat and no one is going to judge them. They then feel more open and willing to "play the game."

## 'Cheat sheets' – waiting-room exercises

Having a cheat sheet for a game helps make people feel more comfortable as they begin playing. Having a personalized cheat sheet to answers/topics that will be covered during the group discussion helps provide a deeper and richer discussion, because they can refer to their notes during the discussion. The more you can visualize and "fun-up" this cheat sheet, the better.

Waiting-room exercises are very helpful when the nature of the study does not allow for a homework assignment but you still need participants to do some thinking about a topic and write down their thoughts and perspectives prior to the group. Having people fill out a short questionnaire in the waiting room enables this (which you have time for if you incorporated an early-bird drawing into your recruiting process).

For example, for a study with very heavy consumers of a fabric softener who were invited to a group that they thought was on the general topic of laundry, we asked them to write down three things they liked best about doing laundry and three things they liked least. We wanted to see if fabric softener made the like list. Surprisingly, more of these heavy users mentioned fabric softener on their don't-like list than their like list – which led to very helpful insights about how the product could be improved.

## Three personal items that tell the story of you

For an international study in the BRIC countries with consumers who were both heavy and loyal consumers of specific beverages, we recruited Millennials with similar demographics. The only difference was that they were loyal to different brands.

One of the objectives of the study, to help with positioning, was to see if they had different worldviews. This was a very challenging assignment, because previous research showed that the different brand loyalists were very similar in job aspirations, hobbies, importance of family in their lives, etc.

To meet this objective, we created an introduction assignment that incorporated some key gaming techniques. The instructions we gave to them as part of the recruiting process were:

At the very beginning of the group discussion you will have one minute to tell "the story of you" so that the other eight people in the room will really know who you are. You will need to pick out and bring three distinctly different items to the group discussion that you will use as part of your one-minute introduction. These items should represent different aspects of who you are and what is important to you. You cannot use any photos, your phone, computer, car keys or wallet.

Remember:

- Rules are important in transforming a (boring) assignment into something more interesting and challenging. So don't just state the facts; create specific guidelines of what they can and cannot do/use for the assignment.
- Competition can be an exciting stimulator. So put in context that others will be doing the same and all will have to present their information.
- Restrictive rules can create fresh thinking. Instead of just making it simple for them to go for the easiest answer, have them stretch.

Using this technique, we were not surprised when the different brand loyalists brought in similar items, because, except for brand preference, their overall demographics were the same. However, because we had challenged them with restrictive rules in terms of time allocation and what items could not be used, they had done true introspection. They could not just grab any easily-available item and, as a result, the language of their stories was very insightful. For example, when loyalists of one brand talked about sports they talked about how good they were at a particular sport, while the loyalists of the other brand spoke about sports in context of being a member of a team.

### More fulfilling and enjoyable

While fun, game-like elements have historically been an integral part of qualitative research, by using techniques like those outlined above, researchers have new and different opportunities to integrate gamification into their projects, enriching the quality of the insights they generate and making the process more fulfilling and enjoyable for all involved. ⓠ

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