

# Qualitative Package Design Research

By Jerry W. Thomas

While many quantitative methods are utilized in package design research, sometimes we overlook the importance of the softer side of research—the qualitative techniques. So, the purpose of this article is to share some basic ideas and best practices for the use of qualitative research as a component in the package-design research plan.

## Intelligent Design

When a new package is to be designed, or an old one redesigned, the process should begin with qualitative research, so that the package design work is informed by a better understanding of consumer motivations, knowledge levels, and perceptions. Insights into the shopping experience and brand-choice decision process can also influence design decisions. Perhaps we can call this *intelligent design*.

Let's take breakfast cereals as our product category and assume that the marketing group for Wheaty Flakes, a fictitious cereal, is interested in a new package design. How could qualitative research be used in the creation and evolution of a new Wheaty Flakes package?



## Definitions

- While the term *moderator* is most closely associated with focus groups, in this paper the term will be used as a generic descriptor for the person conducting a qualitative research project, whether it be focus groups, depth interviews, or ethnography.
- *Depth interviews*, or *in-depth interviews (IDIs)*, are one-on-one interviews lasting 60 to 90 minutes, conducted by a professional moderator.
- *Focus groups* are small group discussions of 8 to 10 respondents, lead by a professional moderator.
- *Ethnography* refers to observational research.



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## What is Qualitative, Anyway?

The line between qualitative research and quantitative research is blurry. The two methods share many commonalities and some important differences.

We define qualitative research as:

- **Small scale** (generally fewer than 50 respondents)
- **Nondirective and open-ended**
- **Limited in structure**
- **Exponentially interactive** (the questions and probes can vary a million ways, depending on answers to prior questions)
- **Ethnographic** (observation is almost always a part of good qualitative research)

- **Non-democratic** (better respondents carry more weight than poor respondents, a stark contrast to quantitative surveys where everyone is equal)
- **Non-statistical** (no percentages or counts)
- **Interpretative** (generally searching for deeper motivations, cultural influences, unconscious forces, and symbolic meanings). Qualitative is especially useful in revealing the “why” of consumer behavior.

## The Best Techniques

While focus groups are the most popular qualitative technique, they are not recommended for packaging research. Much of package research revolves about what the respondent knows, perceives, and understands. When one respondent in a focus group blurts out some fact or opinion about a brand or its package design, the remaining respondents’ awareness, knowledge, and perceptions are instantly changed. Group dynamics, group pressures, and group biases undermine the value of focus groups for most package-design research. Also, group discussions do not allow enough time for the moderator to dig into the minutia of package design.

For packaging research, **depth interviews** and **ethnography** are the recommended qualitative techniques. Both of these methods avoid most of the bias and contamination inherent in focus groups. Depth interviews provide granularity and great detail (up to 10 times as much information per respondent, compared to a focus group). During the depth interview, a respondent cannot hide behind a mask of silence (as often happens in focus groups). A respondent cannot learn from or be influenced by other participants during the depth interview.

Ethnography (or observation research) is likewise free of bias and contamination. Consumers can be observed shopping, reading labels, and interacting with the package—with minimal bias and distortion. During a depth interview, the moderator is also employing ethnographic techniques; that is, the moderator is carefully watching the body language, facial expressions, and movements of the respondent.

## Face to Face

In-person depth interviews are typically recommended over online depth interviews (but not always).

In an in-person depth interview, the moderator can observe how the

respondent reacts to, manipulates, and interacts with the proposed package and/or package designs. The moderator can observe body language and facial expressions, as well as listen for nuances of voice, tone, and inflection. In touching and handling packages, respondents can sense texture, rigidity, and weight—elements missing in online depths.

The actual size of the package and design elements is precisely understood in a face-to-face interview, whereas size perceptions can be misjudged in an online environment. If respondents are widely dispersed, or time is very limited, online depths can be substituted for in-person.

## Tricky Sampling

Sampling is a tricky issue. If you err in who you interview, your project may be doomed to failure. Generally, if it's an existing brand, it's best to talk to your

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core users (you don't want to lose them) and to competitive users that you hope to attract. In general, if you have a high-share brand, it's more important to talk to your core users; if you have a low-share brand, it may be more important to talk to prospective users. If you are developing a totally new package design for a whole new product category, then you will want to talk to concept acceptors primarily, with perhaps a few concept rejecters—just to be safe.

Now, we are ready to go to work on the Wheaty Flakes' package design.

## The Alignment Meeting

The first step is the alignment meeting with the Wheaty Flakes marketing group.

- What is the marketing strategy for Wheaty Flakes?



- What role does media advertising play?
- Will the new package design be supported with media advertising?
- Who are the primary retail chains that carry the brand?
- Which brands compete most directly with Wheaty Flakes?
- Why does the brand group want to change the Wheaty Flakes package?
- What are the marketing and business objectives of the proposed change?
- Why does the brand group think a new package design is needed?
- What core elements of the current design, if any, should be retained?
- What are the risks?

Naturally, the moderator will ask many questions and probe to make sure that she understands the goals and constraints of the project and has the information she needs to design and execute the research.

## Store Visits

A good place to start is inside typical retail stores. The moderator should visit 10 to 15 different stores that carry the

Wheaty Flakes brand to study the cereal section of the store.

- What are the characteristics of the retail displays?
- How much space is devoted to the category?
- How many facing for each brand?
- How are brands and types of cereals organized?
- How are prices displayed?

As she spends time in the cereals aisle, the moderator can observe patterns of shopping behavior.

- How long do shoppers take to examine the cereal display and make a choice?
- How many different packages do consumers look at?
- How many do they pick up?
- Do consumers look at the side panels, back panel, nutritional information, and pricing information?
- How much time elapses before a choice is made?



- Do consumers buy one box or multiple cereal boxes of one brand or multiple brands?
- What are the characteristics of the shoppers themselves?

The information gleaned from retail observation will stimulate questions later on in the depth interviews and will aid in interpretation of the answers.

## The Depth Interview

Assuming an in-person interview, the moderator would begin with some small talk to help relax the respondent. The moderator would then explain the interview process and reveal the presence of observers behind the one-way mirror and reassure the participant that the observers are harmless. So long as the moderator is nonchalant about the

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observers, respondents tend to accept their presence and soon forget about the viewers behind the mirror.

The first set of questions typically focuses on the participant's background, where he grew up, his education, family situation, employment, and hobbies.

People generally like to talk about themselves, so these background questions help relax the respondent and help create a bond of trust between moderator and participant.

The next set of questions would revolve about usage of the product category.

- How often and in what ways are breakfast cereals used, and at what times of day or night?

Then the moderator would begin to ask about specific brands and how often each was consumed.

- When and for what purpose is each brand used?
- How are the brands similar?
- How are these brands different?

The questions and probes would be designed to uncover category motives, and more importantly, the specific brand perceptions and brand-choice motivations.

The moderator would ask the respondent to think back to recent shopping trips and to recall everything he can remember about how he shops the category, and how he buys. These answers would be cross-checked against the observational data in the moderator's mind and probed accordingly. The respondent would be asked about the packages and packaging elements of the brands she used. The moderator would note the colors, patterns, designs, illustrations, claims, or images that were recalled for each package, with some emphasis on the Wheaty Flakes brand (but not so much as to reveal the research's sponsor).

Depending on time available, the respondent might be asked to quickly draw or paint these package designs from memory, using color markers. The goal

of these questions and exercises is to identify any iconic package elements that consumers rely on for brand identification.

The new package design would then be shown (a **prototype package**), along with three or four competitive packages. The line of questioning would revolve around which package designs are most eye-catching, which do the best job projecting desired product attributes, which arouse the greatest purchase interest, and so forth. The moderator would ask many follow-up questions and probes, striving to understand the package design elements that drive consumers' preferences and perceptions, so that prescriptions for design improvement could be offered.

The last questions would involve a panel-by-panel review of the text and design elements for the new Wheaty Flakes package design. The moderator would search for any places in the package copy and art elements where respondent comprehension breaks down, or some type of miscommunication occurs, or vital information is missing.

The moderator would explore with the respondent how to rephrase or rewrite any errant copy or omissions so that communication is absolutely clear. The moderator's objective is to ensure that the new package design achieves the brand's communication and design goals.

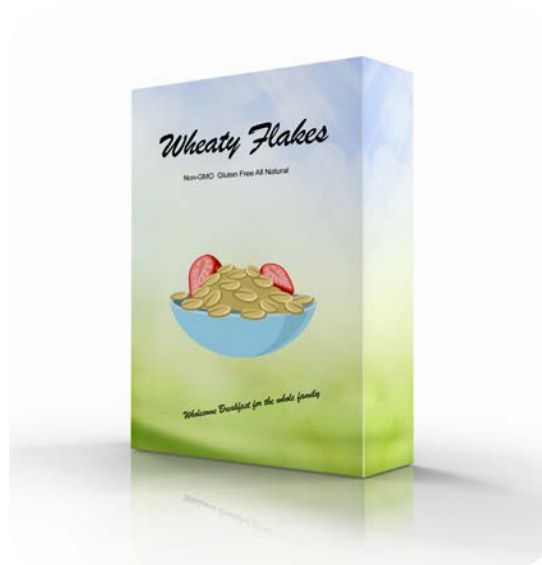
## Multiple Package Designs

Very often, multiple new package designs are taken into qualitative exploration. The greater the number of new designs, the less time the moderator can spend on each. Some of the questioning topics must be eliminated as the number of designs increases. When the number of designs reaches five or more, the questions about shopping habits, buying motivations, and design-element recall might have to be abbreviated or eliminated. It's best to restrict the number of designs to five or less so that all of the important topic areas can be explored adequately.

## High-Share Risks

Qualitative research is only the beginning, and two or three sets of depth interviews may be required, especially if the number of new designs is large. Regardless

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of the number of depth interviews, the final testing should be quantitative, based on 200 to 300 completed interviews per new design, with major competitive brands' packages as the control in some type of simulated retail display.

Where the risks of a new package design are great (as in the case of an established high-share brand), it is always wise to distribute the new package in a limited geographic area until the new design proves its mettle. It is also wise to explore the possibility of using media advertising to introduce the new package—to reduce downside risks.

## A Tall Order

*Package design research is much more important now than it was 30 or 40 years ago, since the great majority of brands now receive relatively little media advertising support. In many instances, **the retail package is the advertising campaign.***

*In a few seconds (at the point of purchase), the retail package must:*

- *Attract attention*
- *Tell the brand's story*
- *Evoke positive purchase interest*

*It's a tall order. And it's the reason companies need to seriously consider qualitative research in the early stages of package design or redesign.*

## About the Author

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Decision Analyst is a global marketing research and analytical consulting firm. The company specializes in package testing, new products research, advertising testing, strategy research, and advanced modeling for marketing-decision optimization.



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