

COMING TO TERMS WITH EMOTIONS

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INTRODUCTION

Qualitative research often claims to also gather – besides rational and functional business aspects – the more emotional side of the coin: feelings, moods and emotions that are related to (consumer) perception, decision making processes and (consumer) behaviour. Since a ‘renaissance of emotions’ can be noticed in marketing, advertising and market research, this potential strongly contributes to the success of qualitative research within the last couple of years. Therefore, ‘intelligent ways of addressing business needs’ (ESOMAR Overview) require an intelligent way of investigating emotions.

‘Standard’ research approaches on how to capture emotions are projective and associative techniques that allow researchers to identify emotions through the analysis of projected brand personalities or imaginative journeys to planets. Furthermore, pictures and collages (whether validated or pulled together more or less spontaneously) are often used since ‘a picture tells more than a thousand words’ particularly since emotions are difficult to express verbally.

We would like to present a set of a new method how to tackle emotions in qualitative market research. This method visualises emotions and structures different kinds of emotions in a ‘landscape of emotions’ based on basic findings of the psychology of Emotions. Emoticons (i.e. icons who express specific emotions) have been designed, selected and validated regarding their potential to represent specific emotions. They reflect findings of empirical research through:

- taking into account the importance of facial expression and body language as channels used in

emotive communication,

- referring to the key dimensions of basic human emotions: positive / negative (evaluation) and active / passive (activation),
- integrating the emotional content and the verbal expression (labelling).

This approach differs from common ways of investigating emotions through a theory-driven conception that allows a structured yet flexible approach that is required in the arena of emotional contents. In our contribution, we would like to balance a theoretical perspective of concepts that were the key starting point of developing our emoticons and the pragmatic introduction of our approach through presenting and explaining the actual visuals and how to use them in our day-to-day business.

We start our paper with a reflection on why concentrating on emotions is an important subject for qualitative market research, before trying to find a definition of emotions. Afterwards, we discuss how to capture emotions and present the “Emoti*Scape” tool in order to show what we can do with emoticons.

WHY EMOTIONS?

Social changes have weakened lifelong commitments to products and brands. Many markets are saturated. A lot of copy-cat products have entered the markets and are often regarded as ‘good enough’ in the eyes of the ‘smart’ consumers and shoppers. ‘Real’ differences are hardly given or have a short period of survival in markets with dramatically shorter product life cycles and an increasing number of “me-too products”. The trade is gaining in power, with their own ‘brands’. Media is fragmenting and consumers’ perceptions of ads are changing in a world with a

growing importance of the internet. Consumers' attitudes towards products are considered as very flexible (cf. Scheier and Koschel 2002, Koschel 2004, Koschel and Rademacher 2005).

Therefore market researchers are challenged to help decision-makers in companies understand their consumers. This basic understanding is necessary to create products and brands that justify a premium. We as researchers need to produce consumer insights. But how do we do this? We need holistic approaches that are able to capture the complexity of human actions. From a theoretical point of view, all human actions are based on rational, but also on emotional components. Leaving aside "rational choice theory", all current human action theories include parts beyond rational behaviour, e.g. Anthony Giddens who differentiates between "discursive" and "practical" knowledge or Pierre Bourdieu who points out the importance of 'habitualized' perceptions and actions (cf. Stoll / Koschel / Kuehn 2006).

In order to research human actions from a holistic view, we have to develop approaches that do not only rely on rational argumentations, but take consumers' needs, thoughts, desires, aspirations, worries, values and visions into consideration (cf. Kuehn 2005). Thinking and feeling is not separated in real life. We think of a car as solid and robust due to the sound the door makes when it closes. A deodorant has to have a certain smell in order to appear 'effective' even if it's not necessary from a technical point of view. We like a TV commercial and think it is 'informative' if we feel curious. Hence, separating emotions from rational aspects in market research neglects an integral part of life and the human nature.

However, if you ask respondents why they buy a particular brand or product, the person is most likely to express rational aspects and features although emotional and seemingly 'irrational' aspects prevail. Therefore while doing market research, we cannot rely only on "rational" answers given by our respondents, e.g. in big surveys. We need to use

special qualitative research techniques in order to dig below the surface of consumer attitudes and to identify emotional roots of their views and values.

Generating the qualitative story means to take a look beyond, to discover hidden and "deep" aspects which are not superficial. Generating the qualitative story also requires the use of holistic approaches that take the whole complexity of human actions into account and do not reduce the analysis to a segmented area of human action, such as rational behaviour. Our clients of market research want to gain basic understanding of consumers' actions – and they do not gain this understanding by reports that are only summarizing frequencies of answers or which are simply leaving out all emotional aspects of human behaviour. Our clients want that, based on our research, we are able to tell them coherent stories. They do not want us to provide fragmented data. They need this information to create innovative products and marketing campaigns in order to stay ahead of the copy-cats.

That's why the attention of market researchers should be especially on emotions. Emotions are becoming more and more important in the context of marketing and communication success. Like first impressions, they are important because they influence the thoughts, responses and actions that follow. They play an essential part in our daily lives since they have an impact – whether we are aware of it or not – on almost all aspects of information processing that Cognitive Psychology examines: perception, memory, opinion building, problem solving, judgment and decision making, etc. Many decisions have to be made in a short moment in a fast world. Rational decision making processes based on thorough and comprehensive data processing is often impossible. Short cuts and references based on key information (rational and emotional) are needed. Consumers feel much more than they think – and it works! (cf. Gladwell 2005).

What is an emotion?

In everyday life, sometimes we label arguments as “emotional” when we refer to something inadequate, wrong or not rational. But we should keep in mind that our brains are the result of evolution. This includes the fact that we have social needs, habits and emotions. Human beings developed emotions in consequence of evolution, and they are necessary for our lives. We need them to decide what is more and what is less important for us. They help us to deal with the multitude of stimuli that our brain has to process every second. Based on our emotional evaluation, for example, we desensitize to familiar stimuli, while our brain can look for new stimuli.

Talking about emotions we should also consider arising knowledge from the neuro-sciences. As stimuli come into the brain, they get processed in two ways: First in the ‘inner’ brain, the Limbic System, passing through for an overall emotional evaluation, e.g. if there is any urgent danger. Second, they get evaluated in the ‘outer’ brain, our Cerebral Cortex, where we find memories, our pleasure centre, emotions and ‘thinking’ (cf. John Hallward 2005). New insights from the neuro-sciences clarify that rational is not the detached opposite of emotional. Rational and emotional are two sides of the same coin, because each and every stimulus gets ‘tagged’ with an emotional evaluation and can be in the same time object of our thinking and more ‘rational’ considerations.

According to the Oxford Dictionary, an emotion means a mental agitation or feeling. But we can’t find an accurate definition of emotions which is accepted by all scientists. For decades theoretical and empirical psychologists struggle to find a comprehensive definition. Especially the connection between cognition and emotion is seen differently by different schools of thoughts. Some psychologists try to explain emotions purely by neurological reaction patterns whereas others have demonstrated the importance of cognitive evaluation (e.g. Schachter and Singer, 1962).

Nevertheless, the following aspects can serve as common denominator of different kinds of emotion and are widely accepted within the scientific community as basic characteristics:

- Emotions are specific states of a certain duration (e.g. shorter than moods).
- Emotions go along with a specific experience of the quality of feelings.
- Emotions correspond with physiological processes (e.g. brain activity in certain areas, increased heart rate).
- Emotions are expressed by body language, in particular facial expressions.
- A certain set of fundamental emotions are expressed in a characteristic manner – regardless of terms used to describe emotions in the actual language or culture. Particularly Ekman and Friezen (1969) have demonstrated in cross-cultural studies that a certain set of fundamental emotions exist that are expressed in a way that is almost a ‘universal language’.

Regardless of the explanation of what causes specific emotions, (most) psychologists agree upon the fact that emotions regulate, influence and even organise our behaviour. We are not always conscious of our emotions, but even if we are not, they have an impact on our attitudes and decision-making processes.

Our brain works to store things in summary units, like stories for example. Every memory unit is tagged with emotions. When it comes to decision-making, our brain automatically combines an emotional evaluation with our memory units. From a marketing perspective, therefore we have to keep in mind that emotions become associated with brands and create a positive or negative attitude toward advertisements, which then becomes associated with or transferred to the brand.

Emotions are of particular importance in strategic brand management. The ‘new paradigm for connecting brands to people’ (Gobé, 2001) requires a framework for the link of people and their emotions

and brands. This should be a driver for marketing activities and has an impact on many levels of the product-life cycle – starting from the first ideas of new products and services up to measuring the communication and the success of the launch.

In order to understand emotions, we should also be conscious that almost everything we do is for ourselves. As a result of evolution, we are looking for our personal benefits. We emotionally judge different options and prefer the outcomes and behaviour that reduces negative and offer the most pleasant feelings. We are striving for rewards for ourselves. Therefore when evaluating a new product or brand, many emotional aspects regarded to the personal benefits are associated with the decision-making process: “Why bother? What do I get out of this? How will people think of me? How will I feel if I buy this brand? What is the ‘Me Pay-Off’... the ‘Brand Give’?”.

Generally, emotions differ regarding two dimensions:

1. a positive or negative character (according to the perceived quality as well as potential consequences); and
2. active vs. passive character (according to the resulting activation level, sometimes linked to the resulting motivation and behaviour).

HOW TO CAPTURE EMOTIONS?

If we ask consumers why they buy a particular brand, they often talk about rational features and rational benefits of the product or service. They provide conscious, cognitive responses – which are likely guarded, socially acceptable, and safe, but are not related to the emotions concerned with the brands, products or services. Therefore we need special research tools that help us to enter in the inner worlds of emotion. In order to develop adequate research techniques to capture emotions, we need to be aware of the difficulties and challenges for the respondents to express emotions:

- Often respondents are not aware of their emotions and are hesitant to describe them verbally. At least 80% of our brain activities are sub-conscious. The

interaction of emotional and rational assessments is a complex process that occurs in our brains without our control. Therefore we need to reflect our own actions and feelings in order to become (more) conscious about the meaning of emotions for our decision-making processes.

- We are not accustomed to talk about emotions in our Western societies. Since childhood we learn that our decision-making should be rational and that we shouldn't rely on emotional feelings in debates.
- Hiding emotions also makes part of several pre-defined social roles and norms, e.g. in combination with masculinity.
- In order to understand the world and what's going on, we are striving to discover rules and are trying to generalize our experiences. It provides us with feelings of security and control. But emotions occur spontaneously, as something that happens beyond our personal control. Therefore, in daily life it is sometimes difficult to verbalise what we feel. From a psychodynamic view we might even say that some of our emotions are too dangerous for our personal balance to feel them consciously. We often focus more on things that we understand in order to feel safe and well-balanced. In the context of market research therefore often it seems to be difficult for respondents to link emotions to a product and a brand. They might be hesitant in order to avoid not having an answer to the moderator's 'why...?'.
• In addition, emotions are something very personal and intimate. By talking about emotions, we open up ourselves and in the same time we become vulnerable. Feelings might be too personal to be admitted to a stranger voluntarily. It requires a faithful and confidential atmosphere to talk about emotions.

Summarizing these difficulties from the perspective of a market researcher, it is important to stimulate talking about emotions by creating a casual, free and easy atmosphere and by building bridges to the internal emotional worlds of the respondents.

Since emotions are kind of a 'universal language' and expressed by non-verbal means, we wanted

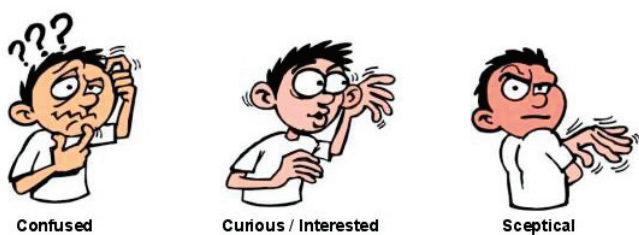
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to use facial expressions and body language as key to enter the world of emotions and to develop a methodological approach how to assess and investigate the emotional quality of brand personalities, product benefits and advertising messages.

But how can this be done without measuring facial response patterns in elaborate and expensive test arrangements?

Our solution was to create visuals that represent emotions instead of measuring the actual elicited emotions experimentally. We started with a manageable list of emotional states and hired two independent artists to illustrate these various emotions. Respondents who participated in our development process associated their emotions to so-called emoticons. An emoticon expresses (in a somewhat exaggerated manner) the typical facial expression and related body posture and gesture in terms of a cartoon. The visuals had to be clear, easy to depict and concise. (See figure 1.)

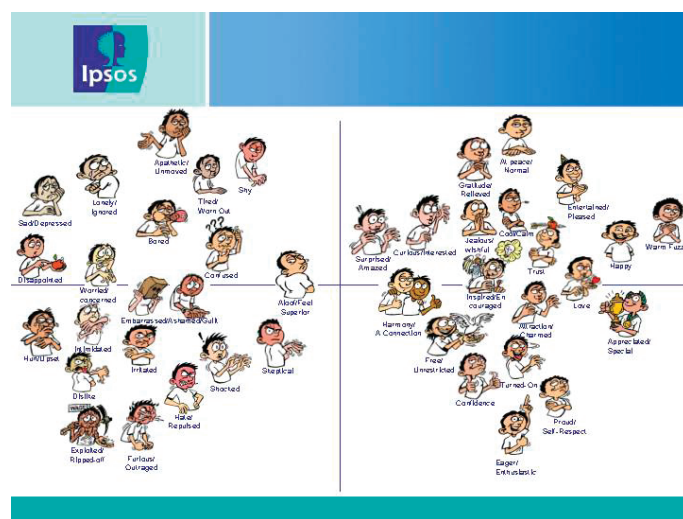
FIGURE 1



To cut a long story short, we conducted several phases of consumer research to understand how the emotions are expressed, how they can be visualised and how they are related to each other. We did this in the countries and cultures that are the most important for our research studies: Europe ('the big five'), North America (Canada, the United States), Latin America (Brazil, Argentina, and Mexico) and Asia (Japan, China).

Eventually, a map of emotions based on consumer insights resulted. This landscape of emotions is called Emoti*Scape and it reflects the two basic dimensions active / passive and positive / negative that have been found in meta analyses of empirical emotion researchers. (See figure 2.)

FIGURE 2



Both steps of this development process have been thoroughly monitored regarding qualitative aspects (e.g. meaning and quality of the emotion) and quantitative aspects (e.g. inter-rater reliability). When comparing the results of exploring emotions conveyed by a number of ads, the results gathered in open-ended questions were less robust, less specific and not as insightful as the responses gained by Emoti*Scape. Why is that?

- Emoti*Scape can build a bridge in the research situation from the rational world of researching to the 'fuzzy world' of emotions. By offering a set of negative and positive emotions in a simple, clear, comprehensive and playful manner a framework is offered which facilitates and supports tapping into the emotional side of things. For instance, the case study discussed later here shows that a wider number of different specific emotions were related to the tested concepts.
- Emoti*Scape also stimulates to dig deeper into the emotional arena through offering visualised emotions

that relate to the dimensions (active – passive, positive – negative) that have been proven to be of high importance in meta analyses of emotion psychology.

- Furthermore, Emoti*Scape can be used in the actual sense of stimulus in order to stimulate a lively and more involved discussion (in in-depth interviews or focus groups) since the participants can refer verbally more easily to what has already been chosen based on a non-verbal basis.

Emoticons facilitate getting access to emotions that are relevant for specific marketing issues and market research objectives:

- Respondents do not have to verbalise their emotions but they can refer to the 'natural' expression via body language and facial expressions.
- They do not have to express and show their own emotions to others (whether 'only' an interviewer or even a group of strangers in a focus groups).
- The method is simple and straight-forward and does not require specific education or vocabulary.
- The risk of creating artefacts and supporting rationalisations is dramatically decreased.

WHAT CAN WE DO WITH THE EMOTICONS?

In qualitative research, emoticons can be used in many ways and contexts:

- for the emotional assessment of product innovation (benefits), branding (brand personality) and communication,
- in face-to-face interviews and in focus groups,
- as stimulus material in order to trigger emotional reactions or as means to measure emotions,
- as stand-alone tool or in combination with other non-verbal tools,
- separately or presented in the Emoti*Scape landscape of emotions,
- complemented by verbal descriptors or without,
- expressed openly or handled discretely (e.g. self-completion questionnaire).

We would like to focus on advertising and concept testing in order to demonstrate the way the

emoticons can be used in qualitative research.

Generally speaking, emotions can be collected at three different levels:

- emotions felt by the respondent after viewing a certain ad or storyboard (emotional impact);
- emotions the respondent thinks the ad or concept is trying to convey (intended emotional message);
- emotions a brand user would feel (projected emotional impact).

By comparing these three levels, the actual and intended emotional impact can be assessed:

- How strongly is the respondent affected positively or negatively?
- How strong is the impact and power to cut through the clutter?
- Does the communication trigger the emotions it intends to?
- What impact does the ad / concept have (intended / unintended)?
- How much can the respondent identify with the brand / ad?

In doing so and in combination with 'classic' qualitative techniques of exploration, the link between one's emotions, the communication and the transfer to the brand can be investigated more thoroughly and comprehensive when compared to other exploration techniques.

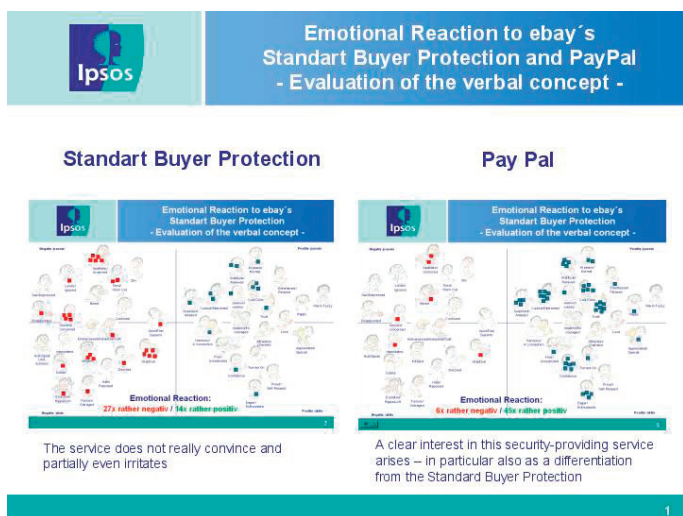
We want to illustrate the use of emoticons with some case studies:

1. We used the emoticons within a focus group setting in order to test the perception and impact of two verbal concepts. We did this study for Ebay and tested the acceptance, use and relevance of two concepts of buyers' protection: standard buyers' and PayPal buyers' protection. After presenting the verbal concepts, we asked all focus groups participants to tell us what they feel about these concepts by ticking all relevant emotions on the Emoti*Scape sheet. After completing our fieldwork, we had a good overview about the spectrum of emotions elicited by the verbal concepts. We could identify different

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impacts of the concepts. The concept ‘standard buyers protection’ could not really convince and partially even irritated. We counted 27 rather negative impressions, and just 14 rather positive ones. Sceptical and apathetic emotions have been ticked most frequently. (See figure 3.)

FIGURE 3



In contrast, the concept ‘PayPal buyers protection’ sparked the interested of the respondents. A clear interest in this security-providing service arose – in particular as a differentiation from the standard buyers’ protection. We counted 45 rather positive impressions and just 6 rather negative ones. Curiosity and trust have been ticked most frequently. (See figure 4.)

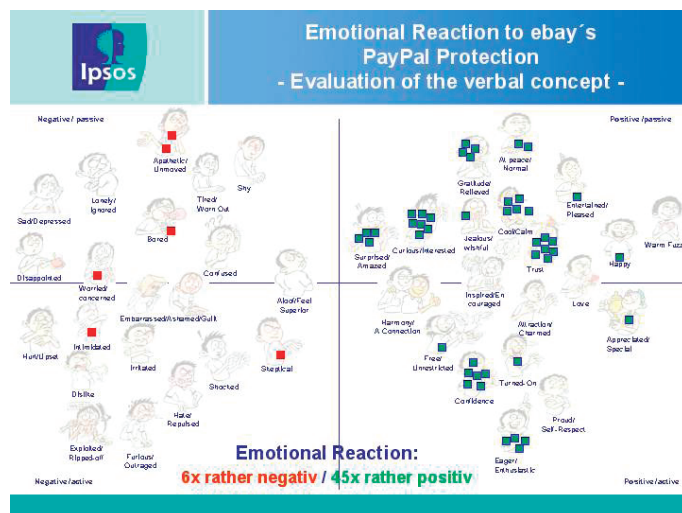
2. We used the emoticons within in-depth-interviews as a tool to trigger emotions and as a starting point for further discussions. After presenting a concept for a new advertisement campaign of a telecommunication provider, we asked the respondents to tick their emotions elicited by the campaign on the sheet of paper showing the Emoti*Scape map. When they told us to be ready, we asked them to comment on their choices. This procedure has the advantage that respondents don’t start to talk on a rational level, but address emotions directly. It’s also a playful entry in the “inner world of emotions” that makes it easier to talk about one’s own feelings.

In order to explore emotional assessments, we should combine this approach with other qualitative techniques in order to receive more information. Within qualitative research, emoticons should be understood as a bridge into emotional worlds, but not as the one and only tool. For a detailed exploration of emotions, respondents need enough space to talk in their own words about what they feel and to reflect their own actions and feelings.

There are many possible ways how to make use of the emoticons during the qualitative research process:

- Present the Emoti*Scape landscape several times during the focus group / interview in order to establish a fruitful interplay: The emoticons encourage to reflect and talk about emotions, and while reflecting about their actions and feelings, the respondents are becoming more conscious about their emotions. Having the opportunity to take a look on the landscape several times during a focus group, helps them to verbalise what they feel, especially when they become more and more conscious of their own feelings.
- Combine the use of emoticons with projective techniques, e.g. by questioning: How would this imaginative person feel? How is the atmosphere on your imaginative planet etc.?

FIGURE 4

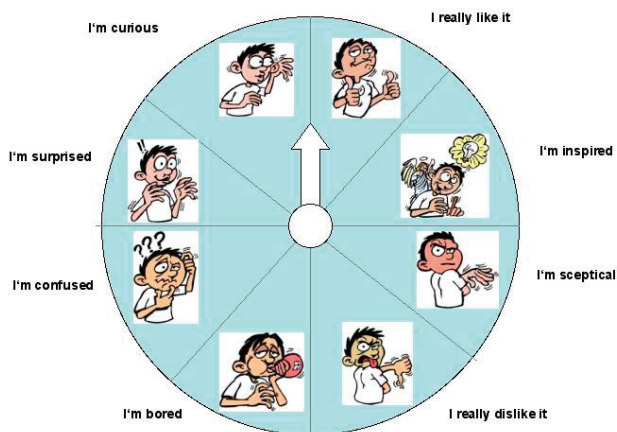


- Present all emoticons on separate cards instead using one sheet with the Emoti*Scape map. This makes sure that the respondents take a detailed look on all emotions.
- Let the respondents arrange groups (with emoticons on cards): which emotions do you feel and how would you group these emotions?

Emoticons are especially helpful when we do research with members of target groups which can be characterized by huge difficulties in verbalizing emotions. For example, children and teens belong to this group.

For research purposes with the target group of children and teens we developed the “Emo-watch” as a tool. (See figure 5.)

FIGURE 5



The “Emo-watch” shows a limited number of emoticons, but includes negative and positive emoticons as well as more active and passive ones. Due to the limited number of basic emoticons, it is easy to handle by allowing a quick overview of the spectrum of emotions. The “Emo-watch” facilitates ticking emoticons for children because all emotions that are presented on this watch are well-known from their own daily-life. Therefore the “Emo-watch” is a very helpful tool to start talking about emotions with children and teens.

SUMMARY AND CONCLUSIONS

Consumers’ decision-making processes are strongly influenced by emotional assessments. To gain understanding of these assessments is essential in order to produce valuable insights into the consumers’ world which can be used for all aspects of strategic brand management. Emotions, though, are difficult to capture because respondents in market research tend to rationalise their own decisions. Therefore, we need innovative qualitative research tools that help us to build bridges into the inner emotional world of consumers.

For this purpose we have developed the “Emoti*Scape” tool. Based on extensive basic research, we differentiate several emoticons which we can use in a very flexible manner during focus groups and in-depth-interviews. The emoticons express typical facial expressions and related body postures and gestures in terms of a cartoon.

Emoticons are in particular appropriate and applicable to...:

1. ...overcome psychological barriers to talk about emotions.
2. ...help the respondents to put their own emotions into words. Some people are better able to communicate non-verbally and some feelings and thoughts are best expressed visually.
3. ...differentiate feelings which appear first as unspecific or a hard-to-define mixture of impressions.
4. ...dig below the surface of first general impressions and statements.
5. ...create involvement. Some questions we discuss initially are important for our clients, but seem to be of fairly minor relevance for the customers. Emoticons sensitize for one’s own emotions and stimulate to express the emotions by the easy handling.

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