The influence of Bill Schlackman on qualitative research

Simon Patterson and **Francesca Malpass**
QRi Consulting

William 'Bill' Schlackman played a major role in the development of qualitative research in the UK. His experience in psychotherapy, clinical psychology and motivational research, as well as his relationship with Ernest Dichter, helped form what we know as qualitative research today. He ran various workshops on the use of projective techniques, for which he is widely remembered, as well as presenting a number of papers at MRS Conferences between 1961 and 1986. Schlackman's passion and enthusiasm for experimental research design, and the use of projective and motivational techniques in market research, helped propel qualitative research to achieve a deeper understanding of consumer motivations. His early work on packaging research can be equated with the modern practice of semiotics, and his development of sensitivity panels can be compared with online communities.

Introduction

William 'Bill' Schlackman was Chairman and Managing Director of William Schlackman Ltd. Referred to by some as the father of UK qualitative research, he is recognised as being responsible for popularising motivational research techniques and contributing to the development of qualitative research in the UK and beyond. Starting his market research career under the mentorship of Dr Ernest Dichter in the United States, utilising his background in clinical psychology and his experience in projective tests, he went on to set up a successful business in the UK. Most of his early work was in researching packaging designs, employing semiotics to understand the aspects that appealed to consumers. Influenced particularly by psychologists Carl Rogers and Fritz Perls, Schlackman harnessed their theories of the 'self-concept' and non-directive

interviewing, developing methods of in-depth interviewing and using enabling techniques. Schlackman also championed the use of sensitivity panels in market research as a tool to get past respondents' defences and obtain deep insight into their motivations and behaviours. This paper aims to discuss Schlackman's papers and theories, giving a complete overview of Schlackman's work and his contribution to qualitative market research.

In the beginning

Bill Schlackman grew up in the Bronx, New York. Originally planning to study philosophy at university, he changed his plans and studied psychology instead after his father asked him 'What does a philosopher do for a living?!'

He received his Master's in Psychology at City College, New York, after completing his undergraduate degree in Psychology at Brooklyn College, and then practised clinical psychology at the Marlboro State Hospital, New Jersey, gaining experience in psychoanalysis, where he refined his skills in interpreting Rorschach tests and thematic apperception tests, skills that he later used and adapted in his market research career.

Prior to his military service in 1954, Schlackman worked as a delivery boy. He was asked to collect a package from the Institute for Motivational Research and deliver it to the offices of *True* magazine. Schlackman famously opened the package, discovering a report with the title 'Why men read *True* magazine'. After reading the study, he realised that this was something he could have done. He later went to the offices of the Institute for Motivational Research and expressed his interest in joining Dichter's team. They gave him a few interviews to do, but as he could not get a full-time job with them at the time, he decided to go into business for himself. After placing an ad in the *New York Times* for a 'psychologist wishing to do consultancy services', Schlackman got a reply from Samuel Rivman, who owned a large packaging company (Bailey & Patterson 2013).

In 1956, after his military service, Schlackman went back to Ernest Dichter at the Institute of Motivational Research, this time armed with reports he had written while freelancing and a few articles he had written about packaging. This time he was hired on the spot.

Dichter and the Hidden Persuaders

Ernest Dichter was Schlackman's role model. He describes Dichter as 'the most brilliant man I've ever met in the marketing and advertising field'

(Bailey & Patterson 2013), and says that 'sitting at the feet of Ernest Dichter was one of the most exciting intellectual experiences of my life. He was one of the most creative advertising men I've ever met and had almost free access to his unconscious mind' (Schlackman 1997).

Vance Packard, a journalist who wrote the exposé *The Hidden Persuaders* in 1957, inadvertently contributed to the fame of Ernest Dichter and consequently motivational research. Despite *The Hidden Persuaders* being somewhat of an attack on the profession, the advertising agencies of Madison Avenue realised the importance of motivational research to their success.

Working under Dichter, Schlackman learned how to implement motivational techniques in a market research setting. Inspired by Dichter's 'creative memorandums' (free-associating in relation to a presented problem), he respected Dichter tremendously. He regards his time at the Institute as a period where he had a great mentor and learned valuable lessons: 'Ernest and I got on very well. I had a lot of affection for him, I respected him, and I think he felt the same way about me' (Bailey & Patterson 2013).

The Institute of Motivational Research had a philosophy, part of which Schlackman outlines in one of his early papers, and which he seems to have carried with him throughout his career:

> As men we live in a social environment that varies, develops and changes. People's psychological and social needs do not remain fixed. People learn, grow and develop. Tastes and desires are malleable. Therefore, we must conceive of the market as a dynamic entity rather than as a fixed, static quantity. (Schlackman 1959a, p. 17)

Dichter believed that some concepts could not be confirmed by conventional research methods, even non-directive interviews, because of consumer defensiveness; but, by using motivational research methods, one could reveal layers of the consumer's deeper motivations (Valentine & Evans 1993; Schlackman 1997). Schlackman subsequently championed this idea and the use of projective techniques in order to get beyond the rational and into consumers' deeper motivations.

In one interview, Schlackman described Dichter's project for Betty Crocker as an example of how successful Dichter's work was. At the time of the research, American housewives expressed enthusiasm for instant convenience foods, but food manufacturers found that housewives were not buying them. Dichter discovered that there was a barrier to the consumption of the product in the form of guilt for using a pre-prepared

meal rather than cooking it from scratch. So the recommendation Dichter made to General Mills in order to remove the guilt was simply the need to add an egg, something that is still required by many Betty Crocker products today (BBC 2002; Schwarzkopf & Gries 2010).

Across the Pond

In 1958 Schlackman met his wife, Joan, a young fashion designer from England, at a social event at Temple Emanu-El; he married her three months later, in 1959. Joan was working in the US, having come over from England and decided to stay. In 1958, Schlackman went to the Motivational Research Centre in London to support David Collins, who had a partnership with Dichter (Branthwaite & Patterson 2012). He worked with David Collins for a year but was subsequently called back to New York by Dichter. The next year, Dichter sent Schlackman back to England to set up and run Dichter's new London office, Ernest Dichter Associates. This time the move was more permanent; he and Joan stayed in England for the duration of his career.

The company was doing very well in England and, after a couple of years, Schlackman went to Dichter, offering to buy 30% of the company. Dichter refused and, when his contract was up, Schlackman left and set up his own business in 1961, William Schlackman Ltd, taking many of his clients with him (Bailey & Patterson 2013).

Motivational research

Derived from an application of Freud's psychoanalytic personality theories, motivational research – the principles of which were pioneered by Paul Lazarsfeld, a leading social psychologist, and popularised by his student Ernest Dichter – became an important and major practice (Henry 1958; Kreuzer *et al*. 2007). It was focused on understanding the motives behind consumer behaviours, believing the most vital task for researchers was to discern and discover the 'real motives underpinning consumer behaviour' from those that are adopted or superficial (Tadajewski 2006; Kozinets 2010). Despite criticisms of its validity, many of which were fuelled by Packard's *The Hidden Persuaders*, motivational research was regarded as an important technique by marketers, and current qualitative research is largely derived from motivational techniques (Kozinets 2010).

At the beginning of Schlackman's career, the Politz–Dichter debate was still raging, with motivational research only just emerging from the shadows

(Schlackman 1989a; Bailey & Patterson 2013). Alfred Politz believed that marketing research required national probability samples of at least 1,200 people for the findings to be valid, and rejected qualitative methods (Belk 2006). Conversely, Dichter advocated the use of small samples and using psychoanalytical techniques to determine the deeper motivations that consumers might be hiding or unaware of. Some regarded this as a debate between fact versus fiction, as motivational research was at times criticised for its lack of robustness and validity, and Dichter himself was often accused of 'free-wheeling' (Belk 2006, p. 6). However, marketers still valued the insights that motivational research provided and, despite these accusations, motivational research became more widespread (Henry 1958).

Throughout his career, Schlackman saw motivational and then qualitative research blossom until it became accepted as common procedure. The flourishing post-war economy and the subsequent development of consumer culture led to the birth of motivational research. But with marketing growing and a need to focus more directly on consumer data, qualitative research was beginning to be formed in place of motivational research (Keegan 2009). By the time Schlackman left the business in the late 1980s, qualitative research was an everyday practice: 'there were a tremendous number of providers of qualitative research' (Bailey & Patterson 2013).

Schlackman describes motivational research as 'interpretive, but usually on a phenomenological or eclectic basis, not exclusively psychoanalytic' (Schlackman 1989a). The shift from motivational research to qualitative research was marked by the movement towards more 'time-effective' interviews 'by setting aside the toolkit of what the therapist could **do** to the patient, in favour of eliciting insights **from** the respondents within a supportive and encouraging environment' (Bailey 2014).

Motivational research techniques allowed the respondents to have a 'discovery experience', giving the interviewer a deeper understanding of what is going on (Bailey & Patterson 2013). Schlackman felt it was, therefore, important to be experimental and imaginative with research design. Motivational techniques enabled the researcher to compare different stimuli; deprivation experiments or modifying projective techniques provided unique insights into consumer behaviours that even they may not have considered previously (Bailey & Patterson 2013).

Carl Rogers and Fritz Perls

Through his background in psychology, Schlackman was strongly influenced by Carl Rogers, a humanistic psychologist. Rogers proposed

the person-centred approach to psychotherapy and counselling, which describes the most important feature of personality as the 'self-concept' – the thoughts, feelings, and beliefs people have about themselves. Rogers believed that people are aware of their self-concepts but that they often do not match reality exactly. He used the term 'incongruence' to refer to the discrepancy between self-concept and reality, and 'congruence' as a relatively accurate match (Rogers 1946, 1959). People experience anxiety when they feel their self-concepts are threatened; they distort their experiences to protect themselves from anxiety in order to hold on to them. People with a high level of incongruence are likely to feel anxious because reality continually threatens their self-concept (Rogers 1959).

The development of Rogers' person-centred approach was intended to be the foundation of a system of therapy. This therapy system was known as 'non-directive therapy' or 'client-centred therapy', and is the application of the person-centred approach to the therapy situation (Rogers 1946).

Schlackman was also influenced by Fritz Perls, who developed his theories through employing non-directive interviewing, and whom, Schlackman believes, is still important and relevant to research today. Fritz Perls was one of the earliest practitioners of Gestalt therapy: taking into account the entire situation and all of the components which, together, create that particular 'form' at that point in time (Nelson-Jones 2000). Gestalt therapy emphasises what is being done, thought and felt, rather than what was, might be, could be or should have been. It is a method of 'awareness practice' by which feeling, perceiving and acting are understood to be conducive to interpreting, explaining and conceptualising (Brownell 2010).

The combined influence of Fritz Perls and Carl Rogers on Schlackman led to him utilising depth interviews in market research, as well as introducing and developing enabling techniques for the group sessions and sensitivity panels that he employed (Bailey & Patterson 2013). The use of enabling techniques in depth interviews, group sessions and sensitivity panels, allowed Schlackman to help his respondents to feel, perceive and act, allowing him to interpret, explain and conceptualise.

The enabling techniques Schlackman employed consisted of various procedures – for instance, talking to the product, having the product talk back, identifying certain aspects of a product, and role playing. Schlackman found that role-playing techniques were very effective in his work and used them frequently. Fritz Perls and Carl Rogers both used encounter groups and non-directive interviewing in their therapeutic methods as a way to develop and maintain an atmosphere of psychological safety. Schlackman's

sensitivity panels, depth interviews and experimentation with projective techniques were a culmination of the influences of these two therapeutic pioneers (Bailey & Patterson 2013).

Schlackman describes Carl Rogers as a 'great influence'. Because of Schlackman's approach to qualitative market research – the non-directive interviewing and client-centred approach – he felt intuitively that giving respondents space – encouraging the respondents' exploration – would reveal what was going on in their subconscious, as well as help the respondents think more deeply about the issue.

> It was essentially an encouraging discussion. Giving the respondent the space to express something, and for you as the interviewer to be supportive, and feeding back to him much what he said, essentially, so that that the respondent can explore it further. (Bailey & Patterson 2013)

Depth interviewing

Early in his career Schlackman used depth interviewing, which had been described by Paul Lazarsfeld in 1943 and again by Robert Merton and Patricia Kendall in 1946, to optimise the influence of packaging on a consumer's desire to buy a product (Merton & Kendall 1946; Bailey 2014). Anecdotally, Schlackman once gave a lecture on the nature of non-directive interviewing and depth interviews on behalf of Dichter as a part of a course run by Paul Lazarsfeld, Dichter's tutor and mentor (Bailey & Patterson 2013).

In 1959, Schlackman describes depth interviews in an article titled 'No more ice cream?':

> The basic technique is the depth interview, in which skilled interviewers who have a background in social sciences spend an hour or two in casual conversation with consumers, manufacturers, advertisers … the atmosphere established is one of relaxed interest and, since no direct questions are posed, the consumer doesn't feel there are 'right' or 'wrong' answers as he so often does when presented with a questionnaire. (Schlackman 1959c)

His use of depth interviewing in this study allowed him to reveal the ways in which the packaging of ice cream can communicate to consumers its psychological appeals, which create consumption desires and give consumers a unique reason to prefer one brand over another (Schlackman 1958a, 1959c; Schlackman & Dillon 1972). Another study informed diaper manufacturers how to package the diapers by addressing mothers'

fears, hopes and aspirations for their infants and themselves as mothers. Schlackman found that they felt conflicted over being repulsed by wet diapers and their desire to be a caring mother, which should not react negatively towards such a natural function. He concluded that the packaging should reflect sanitation: transparency so that the mother can see the product, and white so that the product looks clean, also the projection of a child pleasure theme by using bright colours (Schlackman 1958a).

Schlackman also recognised the importance of the physical environment that is needed for successful depth interviewing. The environment needs to project safety in order for the respondent to feel relaxed, safe and comfortable to be able to openly explore and discuss the issue. If the room is stark and uncomfortable, the respondent will feel more like they are being 'grilled by a policeman'. It is important to build up a sense of comfort for the respondent so that they do not feel threatened by the interview situation or the interviewer:

> I believe that creating a supportive environment in an interview situation, whether it's a group discussion or an individual interview, it's important, because I think stress-interviewing is counter-indicative. (Bailey & Patterson 2013)

Empathy is another important factor in the interviewing situation; if an interviewer has the ability to understand and share the respondent's feelings, they can build a feeling of respect and comfort: 'I think the capacity for empathy is a very important attribute in an interviewer' (Bailey & Patterson 2013). By being supportive, helpful and encouraging, the respondent will feel that he/she is not threatened and can be as open as possible.

The packaging revolution

When Schlackman worked for Samuel Rivman, the owner of a packaging company, in the mid-1950s he researched packaging design and helped give direction to an industry that had gone through rapid success but was floundering in its creative growth and progression (Schlackman 1959a).

Schlackman describes the consumer revolution of post-war America – the movement away from puritanism and towards humanism in a post-war America; 'away from a philosophy of scarcity, denial and self-punishment toward one of consumption without guilt' (Schlackman 1959a, p. 5). This shift became 'the philosophical foundation for accepting luxury, variety and convenience in all aspects of modern life' (Schlackman

1959a, p. 5), which led to a boom in consumer goods and, therefore, the packaging industry. This led to packaging becoming a key ingredient in merchandising, which, in turn, acted as a 'catalyst in the consuming process' (Schlackman 1959a, p. 2).

Schlackman's early research at the Institute of Motivational Research, New York, was into the importance of effective packaging for the successful selling of a product, and the ways that it can influence a consumer into buying the product. He states that 'the package is often the primary or sole salesman', acting as the vehicle that facilitates distribution or that in some way disrupts distribution (Schlackman 1958a, p. 1; Schlackman & Dillon 1972; Schlackman & Chittenden 1986). The most important dimensions in packaging are, according to Schlackman (1959a):

1. to be quickly recognisable to the consumer
2. to make the consumer want to pick it up
3. to be easy for the dealer and consumer to handle.

In-depth interviews, using motivational techniques such as projective tests, package associations and free-choice experiments, Schlackman examined the merchandising environment, the behaviour of consumers in stores and homes, and the psychological attitudes of consumers and dealers towards a product and package (Schlackman 1958a). It is important not to focus solely on the needs of the consumer, as the retailer is the first barrier to the successful sale of the product from a consumer perspective because 'if a package fails to meet the retailer's needs, he will behave in such a way that distribution of the product will be severely inhibited' (Schlackman 1972, p. 449; Schlackman & Chittenden 1986).

The role of symbolic packaging design in buying behaviour

In the late 1950s, supermarkets fostered in consumers a feeling of 'unending abundance' as they epitomised the idea of consumption without guilt (Schlackman 1959a, p. 12). Although, while moving around the supermarket, shoppers would unrestrictedly place items in their trolleys, they would have feelings of guilt when they saw the amount of money they had spent at the counter. However, these guilty feelings were not strong enough to cause the shopper to replace some items on the shelves (Schlackman 1959a).

Research into the buying habits of consumers allowed Schlackman to break down consumer behaviour. For example, 'impulse buying' can

be broken down into 'pure unadulterated impulse: that is a situation in which the person did not plan to buy the brand or product and where there is no usage habit and no category for this product in the individual's buying system', and the more common phenomenon in which a desire for the product is evoked in the consumer when they see the product or brand because they realise they need or could use the product. Usually, in the case of the latter, there is familiarity with the brand or product (Schlackman 1959a). Understanding what makes consumers impulse-buy allowed Schlackman to determine what factors of packaging can initiate these behaviours.

He highlights the importance of using the right colours on packaging and in advertisements as a way to attract consumers, but also to communicate the desired message for the product: 'the effectiveness of our communication will always be greater if we use the appropriate colours in transmitting our message' (Schlackman 1958b, p. 2). Colour is equally as important as design, layout and copy, and will enhance an advert or commercial when included on top of the correct graphics and verbal symbols. The right combination of colours help to 'activate purchase behaviour or will add to the positive image of your product, service or organisation' (Schlackman 1958b). Colours induce the emotional participation of the person receiving the message – they can feel that the message is directed to them personally and can even see themselves in the advertisement. Therefore, if the right colour or combination of colours is used, one can achieve much higher degrees of identification with the advert (Schlackman 1958b, 1959b). Schlackman outlines the five key dimensions of colour in advertising as follows (Schlackman 1958b).

1. It adds to the total image and mood tone of the product or service.
2. It activates purchase behaviour (i.e. the consumer is more likely to be drawn to the product or service).
3. It stimulates identification and emotional participation.
4. It enhances the distinctive qualities of an advert.
5. It creates 'internal cohesiveness' (i.e. it completes the story of the advert).

Packaging symbolism and branding

In his early researching days, Schlackman recognised the importance market research has for companies wishing to develop a brand image (Schlackman 1959b). He talked about symbolic transference – 'the meaning consumers attach to symbols through continuous associations

[that] come to represent the product itself' – as a significant factor in determining the success or failure of a product (Schlackman 1959b, p. 5). The package is 'intrinsically continuous with the meanings the consumer attaches to the product' (Schlackman 1972, p. 450).

Schlackman's research played a key role in understanding what meaning consumers attached to certain symbols and their associations with the product, providing the artistic directors of his clients with vital information and understanding of how to enhance their product advertisement. He felt that the differentiation between products shifted from the physical to the symbolic. Therefore, getting the symbolic representations of the product right is of the utmost importance, especially as many manufacturers' symbolic material did not differentiate them from their competitors (Schlackman 1959a). He states that 'a package which follows the leader, does not displace the leader; it is identified as a poor imitation!' (Schlackman 1959a, p. 11). Products communicate in visual symbols that what is in the packaging will fulfil consumers' physical, emotional and social gratifications (Schlackman 1972).

There is a synergistic relationship between the design of the package and how the consumer uses the product, as the design of the package can influence consumers' purchasing behaviour, but the way that the consumer uses the product should also influence the design of the package (Schlackman 1972). For example, in one study, Schlackman found that frequent users of eye drops found the package awkward to carry around, inconvenient and unattractive, so a new, more attractive, single-unit package dispenser was developed to increase sales and interest in the product by increasing satisfaction in use (Schlackman 1972).

Schlackman argued the importance of having a personal touch or personality behind a product. Using the example of some research he did just before one Christmas, Schlackman found that the products that were gift-wrapped left the consumers with a feeling of friendliness, due to the personal nature of the gesture of gift-wrapping. He interpreted this feeling as 'an expression of the need of people to feel there are other people behind the product – and that these people have their interests at heart' (Schlackman 1959a, p. 10).

Schlackman's research into packaging design, and his subsequent use of projective and motivational techniques, was an early form of what became known in qualitative research as semiotics, where the researcher delves into symbolic communication, and helped translate consumer insights into meaningful advertising and marketing strategies. Semiotics was later popularised in market research by Virginia Valentine and Monty Alexander.

The relationship between economic change and the development and use of research techniques

Schlackman saw attitudes towards, and the procedures of, market research change dramatically throughout his career. In 1978, he presented a paper at the MRS titled 'The relationship between economic change and the development and use of research techniques and methods'. Through the 1960s and 1970s the field of market research grew in the UK, with more firms offering research and membership of the MRS more than doubling (Schlackman 1978).

Market research is a secondary structure that is inextricably linked to the macro economic and political trends that affect corporations. The value of market research and the consequences of utilising research became more appreciated, encouraging further use as it became an essential tool in guiding strategy and reducing risk. However, the market research supplier was still dependent on its host, and is reactive and adaptive to the changing requirements of the host. For example, during the recession of 1974–75, central location research procedures became very popular as they proved to be practical to buyers due to their speed, low cost and control.

Budgetary constraints caused by recessions, coupled with the desire of clients to obtain higher information yield, led to what Schlackman describes as 'Market Research Maturity'. This was characterised by an increasing interest in practical research – questions that respondents find simple to answer, clear and easy to interpret data presentations and processing (Schlackman 1978). Schlackman felt that this change in focus came at a price as 'research designs are geared to answer the relevant questions of the marketing problem in the most efficient, non-elaborate way' (Schlackman 1978, p. 85).

Schlackman predicted for the future of the industry that there would be more specialisation, with units that provide expertise and facilities in particular research areas; there would be more market research companies composed of smaller teams; and the 'cost of people' (interviewers included) would increase, but data-collection costs would decrease, causing a further shift towards central locations, self-completion techniques and telephone interviewing (Schlackman 1978).

The interface between market research management and marketing management in user organisations

Schlackman was a great advocate of the use of market research, and did much to promote its use within organisations. In his 1979 MRS Conference

paper he discussed the interpersonal relationship and organisational factors that affect the influence and the contribution market research could make to corporations. One major finding was that the extent of the contribution market research can make to a corporation varies, and is dependent on the nature of the interpersonal and working relationships between a researcher and a user within a company. Schlackman found that high integration of market researchers within a company results in more harmonious work and higher levels of job satisfaction than instances of low or partial integration. Furthermore, high integration leads to higher success of the enterprise itself due to increased levels of trust, confidence and respect between researchers and other colleagues within the organisation.

In order to improve the status of market researchers' function within a company, he recommended they:

- get involved in the marketing groups and understand their problems
- anticipate research opportunities
- work on the improvement of research tools in relation to commercial problems the company might face
- deliver research faster
- encourage informal contact with users of research
- use online services/retrieval systems
- educate senior management on the actual and potential contribution of market research to the business.

And, most importantly:

- be sensitive to the users' needs
- create an open atmosphere with users
- be self-critical.

Projective tests and enabling techniques

Schlackman championed the use of projective techniques and has been credited with helping to shape the current understanding of these techniques within market research (Bailey 2014). Projective techniques allow us to get 'a deeper level without the respondent fully appreciating what is being projected' (Schlackman 1989b, p. 62). They stimulate the subconscious to encourage an association or response and, in this way, are different to enabling techniques that 'structure a situation to enable the person to express ideas that he might not be able to express in the normal interview situation' (Bailey & Patterson 2013).

> Projective tests enable us to understand what is disowned by the individual and, using the gestalt dialogue technique, it is possible to get the respondent to re-own the material at a conscious level. If this can be done successfully, one usually gets a fuller understanding of the conflicts which may be operative in relation to a given issue. (Schlackman 1989b, p. 65)

In the early days of his career in the US, projective tests (e.g. thematic apperception tests and Rorschach tests) were widely used in market research, but when Schlackman moved to the UK, he found that they were dramatically under-utilised.

Schlackman wrote a chapter in *Qualitative Research in Action* (Schlackman 1989b) outlining the importance, strengths and limitations of using projective tests and enabling techniques in market research. In this he states that perceptual reality was an important factor in understanding why projective tests are useful to researchers (Figure 1). He takes the view that 'reality as we understand it does not exist without a perceiver … that there is no such thing as reality independent of a perceiving organism' (Schlackman 1989b).

Identifying unfulfilled needs

Schlackman used the example of an oasis in a desert to illustrate how needs can influence and alter perceptions: 'a thirsty person walking in a desert will be inclined to misperceive his environment. Often he will see an 'Oasis' where none exists' (Schlackman 1989b, p. 59). This is important, as he states that each individual has unfulfilled needs that the organism is always looking to satisfy or fulfil. By using projective techniques the individual can unwittingly express these needs 'using relatively ambiguous stimulus fields' (Schlackman 1989b, p. 59). We tend not to perceive the entire world that surrounds us, but only the aspects that are relevant to us and our needs. This concept is important in advertising as consumers will pick up on the aspects of the advertisement that are appealing to their needs. Therefore, an understanding of their consumers' needs will enable firms to better direct the messages in their advertisements to their consumers as a reflection of their needs.

Schlackman's assertion that each person needs to maintain a positive sense of self-worth is related to Rogers' belief in the 'self-concept' and that the external environment is constantly drawing into question an individual's self-concept. Each individual's understanding of their environment is relative to their perception of their own self-worth and their needs, which their environment has the potential to fulfil.
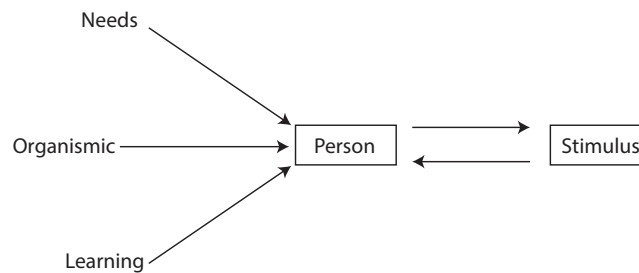
Figure 1 The reality we perceive through our senses is based on a number of variables – the needs of the organism, the structure of the organism, and the nature of the individual's learning experience, 'plus whatever exists in the outside environment to which the individual is responding' (Schlackman 1989b)

Learning is of critical value as it allows organisms to make sense of the environment around them. Without learning, all of the objects and sounds surrounding us would be meaningless. By learning, one can understand the use and meaning of these objects as the brain decodes the messages from the retina; 'in other words, we see far more with our brain than with our eyes' (Schlackman 1989b, p. 60).

Schlackman asserts that 'projective mechanisms are basic processes which start in our infantile development' (Schlackman 1989b, p. 61). The differentiation processes between things that are happening 'inside', and 'outside stimuli', which trigger inner experiences, is a slow process that occurs from birth to later childhood. Children regard themselves as having 'omnipotent' control over the outside environment: 'a small child learns that when he flicks the switch, the light comes on. He/she develops the idea that it is his power to flick that controls light without any understanding of what is actually happening' (Schlackman 1989b, p. 61). This means that, over the course of human development, bad objects are internalised along with good objects, which causes a problem in maintaining a positive self-image. In order to protect our sense of self and self-worth, we get rid of the destructive and threatening internal objects in two ways: projection onto the environment, and repression.

Schlackman's Onion

Schlackman's Model of Consciousness (Figure 2), often referred to as 'The Onion', is the model he created to illustrate the concepts that are used to help decide when and how to use projective tests to access the different layers of a respondent's consciousness.
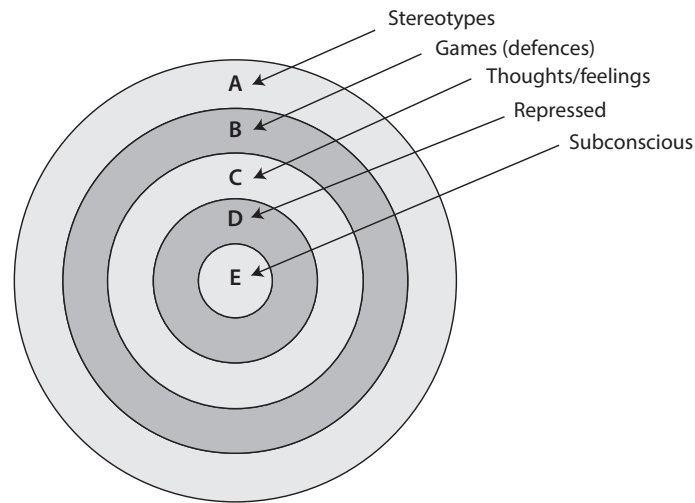
Figure 2 Schlackman's model of consciousness

If the interview material is 'threatening', even to the slightest degree, one tends to get A (stereotypes) and B (games/defences) responses, as the individual is coping with the situation 'by giving simplistic answers or stereotyped responses as a way of avoiding the sharing of genuine thoughts and feelings which might be embarrassing' (Schlackman 1989b, p. 63). There are strong defences between levels C (thoughts/feelings) and D (repressed); due to this, 'it is almost mandatory to use projective techniques' in order to gain a proper understanding of consumer motivations (Schlackman 1989b, p. 64). Increased levels of trust, result in less stereotyping and games due to the development of rapport between the interviewer and respondent. Level E, the subconscious, 'relates to material that was never conscious in the first place and usually material from this level is totally irrelevant within a market research context' (Schlackman 1989b, p. 63).

The appropriate use of projective techniques

The instances when it is appropriate to use projective techniques in qualitative research include (Schlackman 1989b):

1. to help the respondent explore their experience with low levels of anxiety by providing a format that allows them to express themselves without encountering painful or embarrassing feelings
2. to allow the respondent to express embarrassing material

3. to enable the researcher to make interpretations of the data
4. to help the respondent to discover new dimensions of the issue
5. to allow the respondent to express repressed feelings without anxiety.

Stimulus is used to provoke a reaction from the respondent, to help them express their ideas or to encourage fantasy. These can be expressed as physical activity, visual imagery or in words. By using ambiguous stimuli, the respondent can project their feelings and emotions without them being influenced by the subject of the stimulus:

> Basically, a projective test is any situation or stimulus which encourages the individual to project part of him or herself, or an idea system, onto an external object, or into the interview situation itself. (Schlackman 1989b, p. 65)

In his 1986 paper, Schlackman discusses the use of projective techniques in the analysis of psychographic markets. He outlined why they are important in the face of quantitative research that produces disparate results, especially if the questions are not open-ended (Schlackman 1986). Schlackman argued that 'uni-dimensional' attitudes (i.e. quantitative research methods) are measurable as a product of deeper 'attitude structures'. Therefore, uni-dimensional attitude measurement can reflect only a part of the truth but not the whole truth (Schlackman 1986). By engaging in qualitative research methods, one can access these deeper attitude structures and discover a more complete truth because of its holistic approach to people and consumers.

Schlackman discussed the use of tests such as the TAT procedure (thematic apperception test), in which a picture of a situation is presented to the respondent involving the role of the product or service, the respondent then makes up a story about the picture. This allows certain types of data to emerge that would not under usual face-to-face circumstances, revealing information about the respondent that they usually seek to hide or protect themselves against (Schlackman 1986). An important factor in the use of projective tests is that 'unpleasant attitudes are disowned, so that the individual does not necessarily feel that he is expressing his own value or attitude system' (Schlackman 1986, p. 33).

Examples of the projective techniques Schlackman utilised include the following (Schlackman & Dillon 1972; Schlackman 1986).

*   Balloon drawing procedures – the exchange between people in relation to a product or service by having the respondents fill in thought or speech bubbles, and project their thoughts or words into the picture.

- Sentence completion technique – to stimulate the most urgent or dominant ideas that are associated, in the respondent's mind, with the topic/product/service.
- Psycho-drawings – expresses through drawing what respondents cannot through words; useful for expressing moods and feelings.
- Secret pooling – this is more akin to an enabling technique, and is used in groups with relatively safe conditions. The respondents write thoughts that they do not feel comfortable sharing with the group on a piece of paper and mix them all together so they cannot be associated with a single individual.
- Thematic apperception test (TAT) – the respondent is asked to make up a story about a picture, being as imaginative as possible. The picture used should entail a situation where the consumer is interacting with the product, and should be as vague as possible so that the respondent can interpret it in their own way.
- Picture/concept association tests – pictures conveying an emotional tone that cannot be expressed with words. This is useful in understanding the imagery and lifestyle ideas associated with products, brands and services.
- Word association and relation techniques – developed by Jung, the respondent is provided with a stimulus word, idea or product, and encouraged to associate words with them.
- Drawing pictures of objects – the respondent expresses and projects ideas that are relevant to the object being studied.

Sensitivity panels

One of the problems qualitative researchers faced was the ability to build up sufficient levels of trust between the interviewer and the participants. In an attempt to break through this barrier, Schlackman, in the 1960s, created sensitivity panels – a form of reconvened group discussion with the intention of sensitising the group to an issue by repeated group attendance and discussion, allowing participants to develop greater awareness of and sensitivity to the issue (Gordon & Langmaid 1988). Meeting regularly encourages trust, honesty, spontaneity, less 'phoniness' and games, and more honest confrontation of values and beliefs (Schlackman 1984).

The most important aspect of these sensitivity panels was the time involved in collecting data, as a relationship had to be built between interviewer and respondents, and between the respondents themselves. Schlackman states that 'the amount of time we allocate either to individual

interviews or group discussions, is related to the kind of data we need to obtain' (Schlackman 1989b). The longer a group, or set of groups, is, the more in-depth and better-quality data are collected. Generally, it took nine to ten sessions in total per group of respondents, and around 16 hours to get groups to work productively (Schlackman 1984). Training in Schlackman's sensitivity panels covered free association, analogy generation, stream of awareness, fantasy, brainstorming, projection, role play, etc. His paper was presented at the MRS Conference in 1984 and reprinted in the *IJMR* in 1997.

 By repeated exposure to one another and to the issue, respondents are answering the question in a new, revealing way – although not spontaneous, their revelations are important:

> My idea was to get a group of people together, get them to know one another and to trust one another. Trust is a function of time and interaction all the time. So I figured, what we'll do is get these people together and reconvene them, and we could do experiments as well and so on, but, basically reconvene them – and you could introduce different topics over time, but, since the relationships would have been established, you get more useful data. (Bailey & Patterson 2013)

Schlackman's idea of sensitivity panels, he later realised, could be developed to follow a similar format to psychotherapeutic groups, as people would be more intimate with one another, having higher levels of trust, and would feel more comfortable revealing their deeper thoughts (see Figure 3). In order for this to be done effectively, the interviewer must work with them on a level that is not related to marketing, but one that is related to their problems, life, feelings, developing trust in a more therapeutic context before introducing commercial issues. The concept of building up levels of trust 'lies at the foundation of using trained respondents and sensitivity panels' (Schlackman 1984, p. 288).
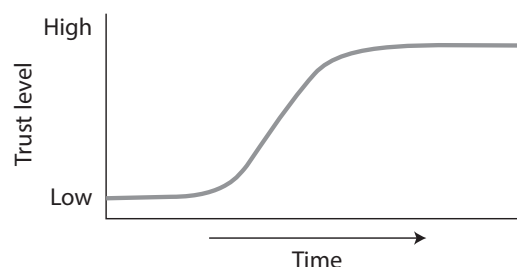

Source: Schlackman (1984)

Figure 3 The relationship between time and trust

Trust

Schlackman illustrated four levels of consciousness (see Figure 4), claiming that conventional groups can penetrate only quadrant A and, to a lesser degree, quadrants B and C. Sensitivity panels can allow access to quadrants A, B, C and D. Projective tests and extended groups enable access to quadrant C (aware/will not share); extended groups enable access to quadrant B (not aware/will share); and projective tests can be utilised to access quadrant D (not aware/will not share) (Schlackman 1984; Sykes & Brandon 1990; Valentine & Evans 1993).

Conventional groups, Schlackman argued, have the problem of individuals not feeling able to confront what other people are saying, conforming to their views instead. This is something that sensitivity panels navigate, as one of the norms of a sensitivity panel is that everybody is entitled to their own opinion, which encourages the participants to be themselves, rather than conform.

Schlackman refers to his model of the layers of consciousness (Figure 2), and states that conventional groups are generally only able to access layers A and B, whereas sensitivity panels are able to access level C relatively quickly due to the high levels of trust repeated attendance builds. To get a level-C response in a conventional group, the threat level must be low,
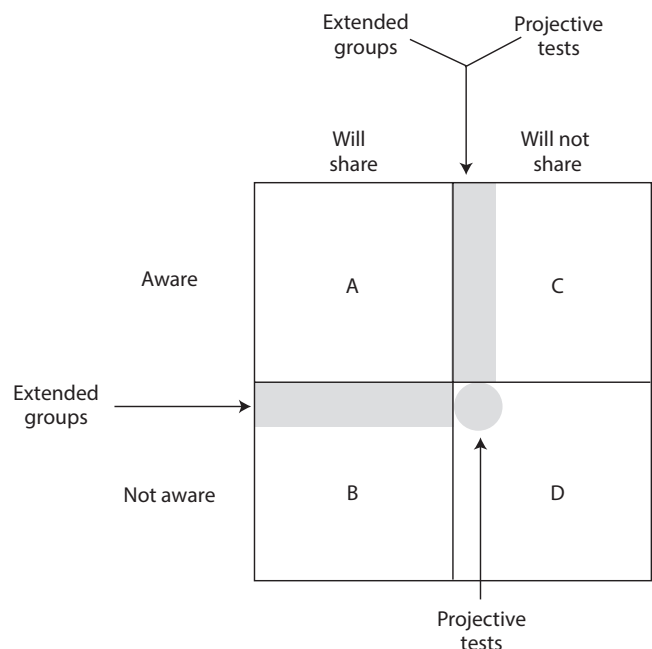
Source: Valentine & Evans (1993)

Figure 4 The four levels of consciousness

but in a sensitivity panel, level C can be accessed even if the threat level is relatively high. In order to access repressed content (level D) – that is to say, dimensions of experience of which the respondent was not previously aware – in a sensitivity panel, one must still use enabling or projective techniques.

Sensitivity panels create the possibility to delineate psychographic segmentations on the basis of intensive work because the interviewer is able to get to know the respondents on a human level – understanding their needs, desires, aspirations, hopes and the kind of people they are; relating the way they think and feel about their life and about themselves to the ways in which they are using various products to achieve their gratifications. Consequently, one can precisely portray meaningful hypotheses about how people are different in terms of their values, personalities and motivations.

Over the course of the sensitivity panels, respondents' perceptions towards the advertising of a product change, having often started out as being quite critical. But Schlackman describes 'some sort of absorption process' that takes place, which establishes their perception and imagery profile in relation to the product over time, rather than at the point of exposure (Schlackman 1984, p. 290). The ongoing situation allows researchers to see how the advertising has affected perceptions and behaviour.

Sensitivity panels can be used only to generate hypotheses, which can be validated through the use of other techniques, as the sample size is small and therefore cannot be used as definitive. However, Schlackman argued that using sensitivity panels is 'the finest way to generate hypotheses for further market research' (Schlackman 1984, p. 293).

Schlackman's work on developing sensitivity panels can be regarded as a precursor to online communities. Although sensitivity panels may seem a long way from online communities, the principles are very similar, with the respondents often returning to take part on a regular basis, and discussions and many projective activities taking place within the groups/communities to provide deeper, richer qualitative insights.

Closing remarks

William 'Bill' Schlackman effectively brought qualitative research to the UK and spent much of his career promoting the benefits of his craft. As he says himself, his company, 'Schlackman's', was known as 'the academy' and gave rise to many successful qualitative researchers in the

UK. He was also a very active member of the MRS and supporter of the AQR, speaking at many MRS conferences and AQR meetings. Based on his clinical training, Schlackman also brought projective techniques into the commercial world, and taught the importance of achieving a deeper understanding of consumer motivations.

So what can we learn from Schlackman some 50 years since he started working with Ernest Dichter? We know that, even when he retired in the mid-1980s, he felt qualitative research, at an overall industry level, was dumbing down and losing its motivational perspective. Today 'qualitative research' is extremely popular, used by many organisations around the world, and has become an attractive career. However, a common sentiment is that anybody can call themselves a 'qualitative researcher' purely because they can talk to people, and what is in danger of being lost is the depth of understanding – the psychological interpretation – of what really drives people at a subconscious level; something that Schlackman was passionate about. This is a far cry from some modern qualitative research, which merely acts as sound-bites to support management decisions.

To Schlackman, qualitative research was about sensitively getting below the surface to understand what a consumer's wishes and desires are, then interpreting them, first, through a psychological and, second, a commercial lens – thus helping clients deliver more desirable brands, products and communication.

Acknowledgements

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About the authors

Simon Patterson is a Chartered Psychologist, Fellow of the Market Research Society (MRS) and is currently Chair of the AQR (Association for Qualitative Research). He has been a Qualitative Market Researcher for over 30 years and has conducted studies in over 40 markets around the world. Following a long career at CRAM International, he set up QRi Consulting in 2010.

Francesca Malpass joined QRi Consulting in 2014, having graduated from Durham University, where she gained First Class Honours in Anthropology. She is passionate about understanding Consumer Behaviour, and is an accomplished Artist. Francesca is also a keen blogger and writer, and is currently studying a Masters in International Politics at SOAS (School of Oriental & African Studies), University of London.

Address correspondence to: Simon Patterson, QRi Consulting, 30 Charing Cross Road, London, WC2H 0DB.

Email: simon.patterson@qriconsulting.com