



W5 on Personas

In today's evolving marketplace, it is important for companies to have a deep understanding of their current and potential consumers in order to remain relevant and successful. Discrete data and the knowledge derived from traditional market research methodologies are often not enough to provide a complete picture and true understanding of consumer behaviors, habits, practices, and unspoken motivations.

Developing personas to supplement and give depth to traditional research results provides companies with a better platform for successful, consumer-driven concept development, design, and marketing strategies.

This paper is designed to provide an overview of persona research, focusing both on the development of personas, as well as their tactical and strategic use over the long term.

What are Personas?

Personas are ideation tools that draw upon previous market segmentations, previous quantitative and qualitative research, and new insights obtained from in-depth ethnographic research to provide a more down-to-earth portrait of the consumer.

Personas are fictional consumer archetypes used to address two primary issues faced by organizations when they design new products, services, and communications:

1.

**Designing
for Oneself**

An unclear understanding of the intended users of a product or service often leads to a tendency for designers to base their design methods and decisions on people similar to *themselves*.

2.

**Designing for
Everyone**

In other instances, designers are often pressured to meet the highly specific and varied needs of *all* potential users, which can contribute to an inordinately lengthy and expensive design process and potentially overcomplicated end product that does not actually meet the needs of any *one* user.

* Although this whitepaper focuses on the development and use of personas among consumers, personas are also an effective tool for profiling and understanding business end users. Please feel free to contact us for more information regarding the use of personas in a business environment.

The purpose of persona research is to understand the underlying and even unspoken goals and motivations of key target users, which will lead to a more efficient and focused design process and ultimately a more successful end product. Personas are developed through an in-depth qualitative exploration of a target consumer base, but they do not represent any one individual examined throughout the research process. Rather, a persona is an archetype developed through identifying individuals who share similar characteristics, attitudes, and beliefs into one character. This archetype is then brought to life with detailed personal information – the individual is given a fictitious name, picture, age, social history, and lifestyle details that relate to the product or service

in question. Thus, a persona becomes a fictional stand-in who accurately represents the needs and motivations of a much broader swath of users and is more relatable across the organization.

Although the demographic and more superficial details of a persona may seem relatively less important than spoken goals and motivations, they highlight and provide valuable insight into one of the most important goals sought after in persona research – understanding a user’s *unspoken needs* and *unspoken motivations* as they relate to certain products or services.

Example Persona

Dena Simmons

Age: 28
 Status: Married, 2 children
 Occupation: Wedding Planner

- Lifestyle**
 - Active social life
 - Enjoys doing things for her friends and family members
- Category**
 - Has a landline only for emergencies, relies on mobile phone for most local and all long-distance calling
 - Uses mobile phone as primary business phone
- Purchase**
 - Influenced by word-of-mouth, especially from her friends and family members
 - Brand doesn't matter, as long as it isn't a "no name"
- Opportunities**
 - Flexible payment plans with carryover minute allowances
 - GPS capabilities, enabling Dena to easily drive her children to and from new activities

Why Conduct Persona Research?

Organizations are often faced with the unenviable task of creating solutions without a common-sense understanding of who their consumers are. Too easily new ideas, designs, and communications become detached from consumer needs as companies attempt to arrive at a solution without truly understanding the problem from the consumer’s perspective. Personas benefit organizations by providing a clear, more intuitive understanding of the consumer.

By presenting the complexity of the consumer marketplace as a series of character archetypes, personas offer a simple basis for ideation that can be understood by designers, MARCOM, executives, accountants, and others across the organization. These archetypes, when used throughout the development process, enable an organization to remain grounded in the actual professional and personal lives of their consumers when designing solutions.

How is Persona Research Conducted?

Understanding what consumers do, say, and think will help create robust personas and better allow your organization to bridge the gap between an understanding of who the consumer is and how to design products, brands, and services for their needs. In order to achieve this in-depth understanding of the consumer, W5 utilizes a combination of the following approaches:



Secondary Research

Persona research often initiates from revisiting previous qualitative and quantitative research engagements, as well as additional secondary research. This data allows researchers to identify gaps in consumer understanding and design a persona research plan that addresses these gaps and brings the customer to life.

- **Analysis of Previous Market Segmentations**

Although persona research must not always flow from quantitative market segmentation, the two research approaches complement one another well, allowing for a greater degree of ROI from your market segmentation initiatives. Quantitative market segmentation research allows organizations to identify the consumer groups that exist within the marketplace who may or may not be a viable target for a specific product, service, campaign, or message. However, these segments, often defined by demographics, psychographics, attitudes, lifestyles, and behaviors, rarely afford the depth of understanding needed to fully comprehend the underlying and unspoken consumer motivations that *drive* these attitudes and behaviors.

Persona research allows organizations to bridge the gap between market segments and the design and development process. Personas, fictional consumer archetypes, are more relatable than market segments, allowing management and design teams to better understand their needs and motivations, which more efficiently and accurately drive design strategies.

A full analysis of previous market segmentations before initiating persona research allows an organization to identify the highest priority segments based on any number of characteristics, including market size, consumption patterns, or purchase likelihood. These high priority segments can then be examined in more detail through in-context qualitative research. This approach allows organizations to focus their persona research on a limited pool of target consumers rather than wasting their time examining a broad swath of consumers who are unlikely candidates for their product, service, or communications.

- **Meta-Analysis of Other Research**

In addition to examining previous market segmentation initiatives, W5 consultants often study other previously conducted qualitative and quantitative initiatives to immerse themselves in the category, brand, and current communication initiatives. This analysis enables W5 consultants to fully understand an organization's current situation and role within the marketplace, paint a picture of the competitive landscape, and highlight competitor and industry successes and failures to identify possible areas of opportunity.

- **Online Ethnography**

W5 consultants also frequently include online ethnography as part of the research process, analyzing chat room activity, professional websites, blogs, web forums, and additional resources discovered during the research. This allows for a thorough exploration of the internal (consumer-driven) and external (professional-driven and ad-driven) influences on consumer perceptions, considerations, and decision-making processes.

Online ethnography is an ideal methodology for establishing a broader context and understanding of consumer lifestyles, as well as their motivations and barriers for using a particular product, brand, or service. An online medium permits a high degree of anonymity and freedom for many individuals who may monitor their thoughts and opinions throughout their day-to-day lives. As such, when individuals express their thoughts, fears, opinions, and questions in an online forum, they are often more effusive and unedited than they may typically be. In addition, an online forum provides a sense of community, allowing individuals to benefit from the collective knowledge of the online society as a whole and thus become experts in a particular field through a non-traditional approach.

Free-Form In-Context Ethnography

The somewhat sterile environment of most qualitative research can encourage “stock” answers and sometimes provide an inaccurate picture of the reality of consumer behavior. As such, the most effective form of persona research utilizes in-context ethnography, taking place when and where consumers interact with a product, brand, or service. In-context ethnography can mitigate the unintentional, but still inherent, bias of consumers attempting to describe unconscious behaviors. Putting researchers close to the action allows them to gather insights and observations that might otherwise go unnoticed or unreported by the consumer in a traditional research setting.

- **Observation**

Consumers’ relationships with their environments are multi-dimensional, and individual consumers are often not fully self-reflective or conscious of the underlying and unspoken forces that may shape their behavior and decision-making processes. Diligent in-context observation allows W5 consultants to delve beneath cognitively apparent motivations and behaviors and identify the more veiled psychographics, attitudes, and motivations that drive that behavior. It is these unspoken psychographics, attitudes, and motivations that become the basis for identifying and differentiating the resulting personas.

- **Intercept Interviews**

In-context intercept interviews with consumers enable W5 researchers to validate their observations and augment the research with nuanced richness. Intercept interviews typically involve free-form discussions that cover a range of topic areas depending on individual responses and receptivity. The informal nature of intercept interviewing allows for the exploration of topics that meet the study objectives but that may not have been anticipated in the original interview protocol.

Structured In-Context Ethnography

In addition to free-form in-context ethnography, W5 consultants often utilize structured in-context ethnography, which can include pre-recruited interview sessions, pre-recruited focus group sessions, and participant diaries or other homework exercises.

- **Pre-Recruited Interview and Focus Group Sessions**

Like free-form intercept interviews, pre-recruited interview and focus group sessions are most frequently conducted in the context of where consumers interact with a product, brand, or service, such as at home, in a retail environment, or in the office environment. The benefit of pre-recruited sessions lies in their more structured nature, enabling W5 consultants to spend an extended amount of time with consumers, exploring their environments, lifestyles, motivations, and behaviors.

- **Participant Exercises**

W5 also frequently uses participant diaries or other homework exercises to encourage research participants to chronicle their day-to-day activities, interactions with a product or service, or benefits and frustrations as they relate to a particular product or service. These exercises challenge research participants to think about their behaviors in a more conscious way than they typically do, adding to the richness of the data obtained through the accompanying interview and focus group sessions. These exercises can include diaries, brand association exercises, collection of photographs or other artifacts, etc.

How are Personas Derived from the Research?

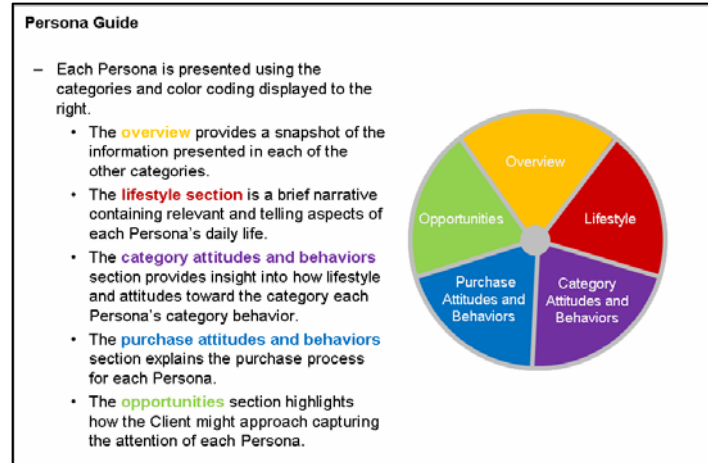
Once fielding has concluded, there will be a wealth of information about the target consumers. The next step is identifying the spoken and unarticulated lifestyles, behaviors, needs, and motivations that will form the basis of each persona. It is helpful to focus on points of differentiation when organizing the behavior and attitudes of the participants. Each of the participants will fall somewhere within the spectrum of these behaviors and it is here that trends begin to emerge – the same participants will cluster around a smaller set of behavioral variables and the beginnings of a persona begin to take shape.

Personas are an amalgamation of lifestyle, motivational, attitudinal, and behavioral trends combined with demographic data and creative flourishes to bring the consumer to life with a name, background, and photograph. For each persona, descriptions of behaviors and attitudes are combined with data added from the research to provide detail and context. For example, in the context of technology, behaviors and attitudes may be described through typical work-flows and usage patterns, while with consumer packaged goods, it might be in a description of a typical day of balancing work, children, and personal lives.

Adding personality and biographic details to your personas will help the consumer become “real,” but it is important to remember that each persona is firmly grounded in research data and an expression of a group of consumers, not just *one* consumer. Alongside these details are sometimes lists of goals, needs, pain points, and frustrations.

Once personas are developed and described, the goal is to identify the relative weight that will be applied to each individual persona. To do this, personas are identified as *primary* or *secondary*, and occasionally *negative*.

How Personas are Presented



Primary

The primary persona is the persona for whom it will be the most difficult to design. The primary persona is often referred to as the “neediest” or “pickiest” persona.

Secondary

Secondary personas are the personas developed to be “less picky” than the primary persona. Their needs are often less complex and they are easier to please.

Negative

Negative personas are those who are unlikely to use a product or brand. Identifying negative personas helps an organization identify which personas they should *not* try to please.

Because the primary persona is the persona who is most difficult to please, keeping the primary persona's needs at the focal point of the design process will ensure that the needs of the widest swath of consumers are met. The needs and motivations of secondary personas should be considered in the design process, but secondary personas are easier to design for, and a design that meets the needs of the primary persona will, quite often, meet the needs of all secondary users.

Making Personas Work for You

Identifying these unspoken needs and motivations through qualitative exploration helps a client move beyond *how* a product or service is used and *how often* it is used in order to understand many of the *whys* behind product and service usage. Personas provide a context for usage, which provides immense insight into the design and development process.

This motivation-focused approach to product and service design provides designers with the tools they need to effectively develop products, services, and communications that will be relevant to the needs and preferences of the primary and secondary personas. This approach will mitigate consumers' frustrations with a given product or service, thereby increasing satisfaction and loyalty.

Creating personas can be a revealing process in itself and many organizations learn a great deal about their consumers by distilling their key behaviors and attitudes into archetypes. But the true value of personas is in their subsequent use – the application of personas in guiding future design, communications, and other relevant consumer experiences. With personas, it becomes easier for organizations to understand who they should be designing for by organizing the demands of consumers and providing a basis for ideation.

Persona research and the subsequent adoption of consumer archetypes within an organization fosters simplicity of design. With personas, design is targeted to meet the demands of a single consumer who is an archetype of a larger consumer group – complete with a name, biography, and detail about his or her goals, needs, and frustrations related to product, brand, or service interactions in their day-to-day lives. The other option is an incomplete solution that attempts to meet the needs of too many consumers and fails to do one thing well.

The success of personas depends on a commitment by the organization, because in a sense, personas become members of the overall strategic team. They become an integral part of the innovation and ideation process, available for consultation throughout the development, and still there after execution to make sure the organization has been honest about putting consumer demands at the forefront of design.

Personas can be utilized across each step of the creative process:



1 Concept Ideation

At the start of any initiative, personas can be used to understand the current design and innovation issues in the category, as well as how future concepts may or may not address these problems. Understanding the demands and frustrations of archetypes presented as real consumers gives an organization clear direction: to make meeting the demands of the consumers the focus of their design.

During this stage, it is often useful to devise scenarios for consumer interaction with whatever brand, product, or service is being considered and begin to describe its ideal use. This paints a clearer picture of an end product and how it fits into a consumer's life, lifting static statistics, research results, and market segmentations off the page to inspire developers and creative teams.

2 Design and Development

Personas should remain a part of the process well beyond the initial ideation stage. The effective use of personas requires an organization to frequently return to these consumer archetypes to guide the development process. This helps teams remain grounded in consumer needs, rather than getting carried away with designing for themselves or designing for all consumers in the marketplace.

3 Review and Reality Check

It is important to return to the personas for a final sanity check once the concept begins to take shape. This helps organizations understand the implications of their design on how the finished product or service might fit into the lives of their consumers.

Want to Know More?

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