PERSONAS

WHAT IS A PERSONA?

Personas are a research tool that provides a better platform for successful, consumer-driven concept development, design, and marketing strategies.

W5

W5 ON PERSONAS

Organizations are often faced with the unenviable task of creating solutions without an understanding of their consumers. Too easily new ideas, designs, and communications become detached from consumer needs as companies strive for a solution without truly understanding the consumer perspective.

Personas are creative consumer-centric archetypes that serve as inspiration for design and marketing teams. Qualitative research findings are expressed as a single "person" with goals, challenges, routines, and feelings, as well as narrative descriptions of their daily life and work. Personas become a realistic stand-in for the target consumer that ensures new ideas stay grounded in real-world needs and expectations.

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

SARAH
The Independent Entrepreneur

AGE: 27 years old

LIFE STAGE: Engaged

OCCUPATION: CMO at a startup digital marketing agency located in Durham, NC

"I feel connected to my family and southern roots, but I'm definitely motivated by different values. I want to own my own business and make it on my own."

Southern Engagement

Financial Risk Comfort

Technologically Inclined

INTERESTS AND LIFESTYLE

Getting married and beginning to think about starting a family

Consumes content via Snapchat and various social media sources

Starting a business, networking is important

WHY DEVELOP PERSONAS?

Personas provide a clear, more intuitive understanding of consumer lifestyles, needs, goals, attitudes, and behaviors. They address two primary issues faced when designing new products, services, or communications:

Designing for Oneself

An unclear understanding of the intended users of a product or service often leads to a tendency to base decisions on people similar to themselves.

Designing for Everyone

In other instances, creators and managers are often pressured to meet the highly specific and varied needs of all potential users, which can contribute to a lengthy and expensive design and development process and potentially overcomplicated results that do not actually meet the needs of any one user.

By presenting a complex marketplace as consumer archetypes, personas enable a company to remain grounded in the actual day-to-day lives of their consumers when developing new ideas for products, services, or communications initiatives. This shared, consumer-centric view of the target audience can be leveraged by designers, MARCOM, executives, brand managers, and others across the organization.

HOW PERSONA RESEARCH IS CONDUCTED

Although this white paper 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 W5 for more information regarding the use of personas in a business environment.

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, each persona is developed by qualitatively aggregating individuals who share similar characteristics, attitudes, and beliefs into a single character.

This character is then brought to life with detailed personal information —a name, picture, age, social history, and lifestyle details that relate to the product or service in question. Thus, a persona becomes a stand-in accurately representing the needs and motivations of a much broader swath of consumers.

To achieve an in-depth understanding of the consumer, W5 uses a combination of qualitative research approaches found on the following pages.

IN-CONTEXT ETHNOGRAPHY

Traditional qualitative research can arguably encourage routine answers and sometimes provide an at-best normative reality of consumer life. A more effective form of persona research uses 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. Immersing researchers allows them to gather insights and observations that might otherwise go unnoticed or unreported by the consumer in a traditional research setting.
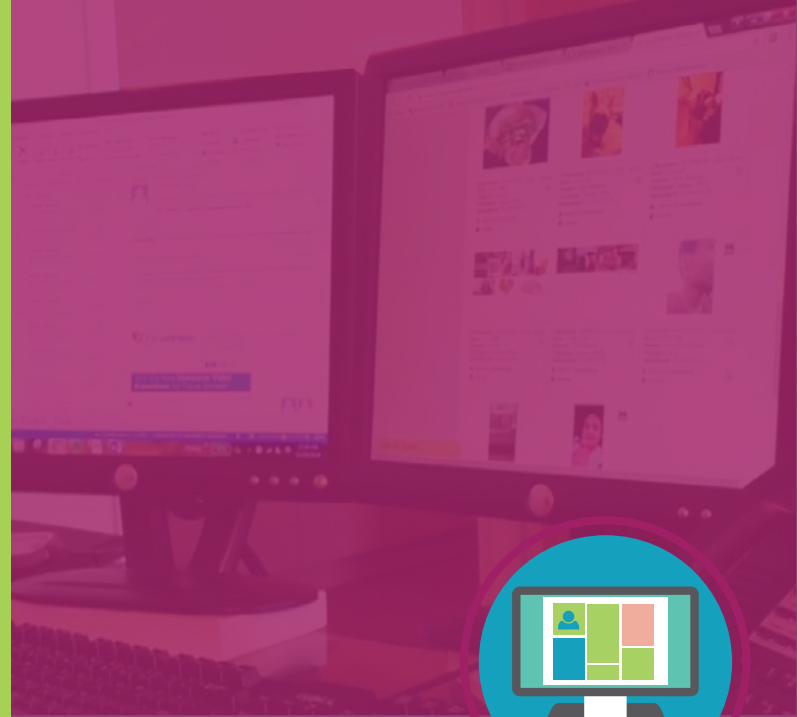
ONLINE ETHNOGRAPHY

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 share thoughts and opinions at their own pace. When individuals express their thoughts, fears, opinions, and feelings in an online forum, they are often more effusive and unedited.

IN-PERSON 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 and drivers. These unspoken psychographics, attitudes, and motivations become the basis for identifying and differentiating resulting personas.

ETHNOGRAPHIC INTERVIEWS

Ethnographic interviews with consumers enable W5 researchers to validate their observations and augment their findings with detail and nuance. Interviews typically involve topical, yet free-form discussions that cover a range of themes relevant to the study objectives. The informal nature of ethnographic interviewing allows for the exploration of topics that meet the study objectives, but may not have been anticipated in the original interview protocol.

Incorporating Existing Research

Persona research is often motivated by a desire to better understand and bring a "human face" to existing consumer information or market segmentations.

Although persona research does not always flow from quantitative market segmentation, the two research approaches complement one another well, allowing for a greater degree of ROI from market segmentation initiatives. Quantitative market segmentation research allows organizations to identify the consumer groups that exist within the marketplace. However, these segments could benefit from additional insight into underlying consumer motivations that drive attitudes and behaviors. Personas can be more relatable than market segments, allowing a better understanding of needs and motivations, which more efficiently and accurately drive strategies.

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 and brand. This analysis enables W5 consultants to fully grasp 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.

What Personas Are Not

THE RESULT OF QUANTITATIVE RESEARCH

Personas research and analysis is a purely qualitative approach that integrates or expands on quantitative findings, so results are not projectable to a larger population.

FICTIONAL

Narrative and creative details are added to personas to present actual qualitative research findings in a manner that is more relatable.

SEGMENTS THAT REPRESENT A QUANTITATIVELY DEFINED PORTION OF THE MARKET

Personas initiatives often result in the creation of three to five personas representing various consumer types; however this does not mean these personas are a composite of real-world market segments with clearly defined size or opportunity.

DEMOGRAPHIC PROFILES

Personas use shared behaviors and attitudes as a framework for their creation, not demographic details such as age, gender, etc.

HOW ARE PERSONAS DERIVED FROM RESEARCH?

Once qualitative fielding has concluded, there is a wealth of information collected about consumers. The next step is identifying the spoken as well as 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 participant 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.
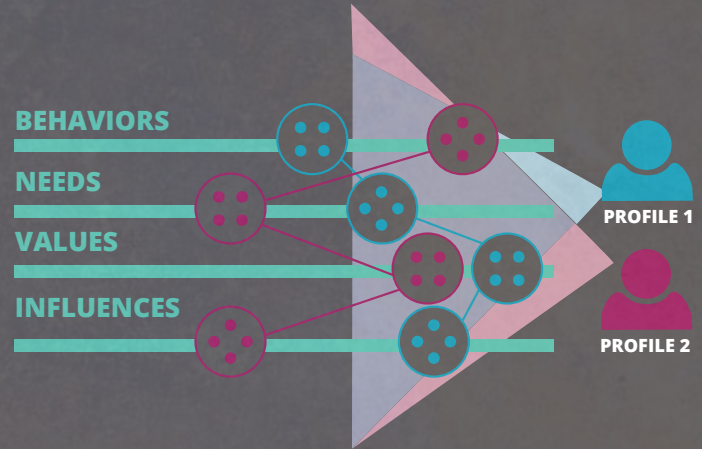
Personas are an amalgam of lifestyle, motivational, attitudinal, and behavioral trends combined with real-world details to bring the consumer to life with a name, background, and illustrative profile. For each persona, descriptions of behaviors and attitudes are combined with data added from the research to provide detail and context.

For example, in the context of technology, behaviors and attitudes may be described through typical workflows 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 personas helps the consumer become "real," but it is important to remember that each persona is firmly grounded in research data and an expression of a shared behaviors and attitudes of many consumers. Alongside these details are often lists of goals, needs, pain points, and frustrations regarding the context under investigation.

By the Book
Blanche

When Blanche has a new interest she researches and follows instructions to ensure she is learning the process and will have a great result.

"I'm always excited to learn a new skill in the kitchen."

26 years old
Married, no children
Master's Degree
FT, Project Manager
$51K-$75K

COOKING EXPERIENCE
●●●○○

Cooking is just one of her many interests.

LEARNING EASE
●●●●○

Blanche comprehends processes faster if written instructions are provided.

ETHAN, THE MILLENNIAL ENTREPENEUR
Tech Savvy • Budget Conscious • Multi-Tasker

"A tablet should be as fast as my Bianchi."

GETTING TO KNOW...ETHAN

Ethan likes being his own boss. He is entrepreneurial, owning his own bicycle shop that also sells parts online. He makes due with the devices he has to ring out sales, track inventory, and manage the accounting. Running a business has put Ethan in the fast lane, and he needs technology that can keep up.

SELECTION CRITERIA
· Fast processing speeds
· Reliability with automatic back-ups
· Built-in security
· Affordability
· Lightweight portability

ENGAGEMENT
Ethan researches his tech products before investing. He learns specs from manufacturers' sites, but reads reviews from third-party sites believing they are more trustworthy.

PENNY
The Planner

Penny currently has one child, but is planning to have a second in the near future. She wants to explore all of her options for a primary healthcare provider not only for her, but the entire family.

Background

Penny learned a lot from her first pregnancy. She now has a better understanding of what qualities she is looking for in a healthcare provider. Now that Penny's family has moved to a new house, she has to find a new provider.

The hours of her current provider are not conducive to her work and homelife schedule. Their only location is also a long drive from her new house. The location also lacks children's entertainment, which makes managing her young one more difficult.

Needs

Flexible hours of operation and weekend hours

An easily accessible location or multiple satellite locations that are positioned within her daily commutes

Children's activity center

Hopes for the Future

A one-stop shop for all of her and her family's medical needs

A compassionate staff that enjoys working with her and her children

A healthcare provider with a scheduling system that works with her busy life

HOW PERSONAS ARE PRESENTED

Each persona is presented using the categories and color coding displayed below:

OVERVIEW
The overview provides a snapshot of the information presented in each of the other categories.

LIFESTYLE
The lifestyle section is a brief narrative containing relevant and telling aspects of each persona's daily life.

CATEGORY ATTITUDES
The category attitudes and behaviors section provides insight into each persona's interaction with products and brands in the category.

PURCHASE ATTITUDES
The purchase attitudes and behaviors section explains the purchase process for each persona.

EMOTIONAL REACTIONS
The emotional reactions section describes how each persona emotionally responds to the category or purchase process.

OPPORTUNITIES
The opportunities section highlights how the client might approach capturing the attention of each persona.

OVERVIEW

LIFESTYLE

CATEGORY ATTITUDES

PURCHASE ATTITUDES

EMOTIONAL REACTIONS

OPPORTUNITIES

MAKING PERSONAS
WORK FOR YOU

Personas provide a deeper understanding of the context and motivations behind consumer behavior, valuable insight that can drive the design and development process for product and communications.

This motivation-focused approach to product and service design provides valuable tools to effectively develop products, services, and communications that will be relevant to the needs and preferences of personas. This approach assists in abating 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 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.

With personas, it becomes easier for organizations to understand who to design for by organizing the demands of consumers and providing a basis for ideation.

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 and makes meeting the demands of the consumers the focus of their efforts.

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 your personas for a final reality check once product, service, or communication ideas begin 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.

By the Book Blanche

When Blanche has a new interest she researches and follows instructions to ensure she is learning the process and will have a great result.

"I'm always excited to learn a new skill."

- 26 years old
- Married, no children
- Master's Degree
- FT, Project Manager
- $51K-$75K

Winging It Wendy

Wendy tries to do it all for her family. She overcompensates for her lack of experience by being adventurous and values the joy of the process over the end result.

"The best memories are full of 'happy accidents'!"

- 31 years old
- Married, 2 children
- Some college
- PT, Personal Trainer
- $24K-$50K

Perfection Parker

Parker has his life and processes carefully planned out. He's always thinking ahead to avoid mistakes.

"Anything worth doing is worth doing right!"

- 40 years old
- Divorced, no children
- Trade school
- FT, Chef
- $76K-$100K

Sample Persona Comparison

CASE STUDY

CRAFTING COMMUNICATION STRATEGY WITH PERSONAS

A leading convenience foods company was interested in redesigning their communication strategy for a popular morning food brand. Ultimately, the client sought to realign their advertising and brand positioning to include a broader family audience, shifting their focus from moms and teens exclusively.

APPROACH

W5 recommended developing lifestyle and behavior-motivated personas to guide the client's understanding of a broader core consumer audience. W5 consultants conducted in-depth in-home interviews and shop-alongs with a diverse representation of select family members. Conversations focused on emotional and rational connections to the food brand and their lifestyle approach, including attitudes toward time management, food decisions, and emotional outlook. Participants were asked to keep diaries of their daily eating habits to stimulate category engagement and uncover underlying attachments to the brand.

RESULTS

Based on this extensive, in-context research, W5 developed and presented a set of personas representing a wide range of family roles (father, mother, brother, sister, etc.) and ages. The personas represented consumer archetypes defined by emotional connections to the brand and a general approach to life and happiness. Personas were leveraged by multiple teams in the organization to inspire marketing and communications campaigns and optimize product line offerings to align with consumer needs.

W5 is a boutique custom marketing research firm. We focus on answering who, what, when, where, and why people relate to products, services, and brands. W5 conducts full-service marketing research and research strategy services for Fortune 500s and leading advertising agencies.

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