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Experimenting with ZMET: Issues and adaptations

Tauheed Ahmad Ramjaun Dr
Bournemouth University, tauheed.ramjaun@gmail.com

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Abstract

This paper is aimed at academic researchers considering the adoption of the Zaltman Metaphor Elicitation Technique (ZMET) as a qualitative data collection method. It is meant to warn about the practical difficulties and challenges that the inexperienced ZMET researcher might face on the field. It argues that while the use of ZMET can allow for a deeper exploration of issues with participants, there could be potential challenges and issues that a novice ZMET researcher could face. Several recommendations are provided on potential adaptations to the technique based on the author's own experience.

Keywords

ZMET, in-depth interviewing, projective techniques

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Experimenting with ZMET: Issues and Adaptions

Tauheed A. Ramjaun
Bournemouth University, United Kingdom

This paper is aimed at academic researchers considering the adoption of the Zaltman Metaphor Elicitation Technique (ZMET) as a qualitative data collection method. It is meant to warn about the practical difficulties and challenges that the inexperienced ZMET researcher might face on the field. It argues that while the use of ZMET can allow for a deeper exploration of issues with participants, there could be potential challenges and issues that a novice ZMET researcher could face. Several recommendations are provided on potential adaptions to the technique based on the author's own experience.

Keywords: ZMET, in-depth interviewing, projective techniques

Introduction

There are numerous variants of qualitative interviews in the practice of empirical social research with each having their strengths and limitations (Hopf, 2004). In-depth interviewing is one variant which has been found to be suitable “when seeking information on individual, personal experiences from people about a specific issue or topic” (Hennink et al, 2011, p.109). There can also be various approaches to in-depth qualitative interviewing depending on the focus and depth of the investigation. In the field of marketing research, some scholars have included the use of various projective methods into their interviewing process to better explore and capture the different facets of human expression – verbal, visual, dramatic, artistic and imaginary (Rook, 2007). By encouraging participants to use different forms of metaphoric expressions, the researcher hopes to better tap into their feelings, emotions and perceptions. Such an approach can be particularly useful when metaphorical theoretical constructs are being used to explore concepts like brand image, brand relationships, etc. However, it has also been observed that in the field of marketing research, Rook (2007) deplored that “few guidelines exist to help researchers select particular projective techniques or construct a battery of them to investigate specific issues” (p. 145). One of the few approaches that seemed to have gained some form of recognition in the field of qualitative marketing research is the Zaltman Metaphor Elicitation Technique (ZMET) introduced in academia in the mid-1990s as a step-by-step process involving several projective methods already established in social sciences (Zaltman & Coulter, 1995) that could potentially allow the researcher to “dig deeply into the mind of the market by taking new approaches as well as improving upon old ones” (Zaltman, 2003, p.74).

Since its introduction, ZMET has been used by various interpretive scholars over the years mostly in studies pertaining to consumer behaviour, advertising and marketing (see for example Coulter et al., 2001; Christensen & Olson, 2002; Lee et al., 2003; Ling et al., 2009; Zaltman & Coulter, 1995) but has also been applied in other contexts beyond commercial marketing – a recent example is the study by Kokko & Lagerkvist (2017) using ZMET as a tool to better “capture what beneficiaries think about specific problems a program is aimed at solving and their underlying beliefs” (p. 205). Even though ZMET was registered as a patented marketing research technique in the United States, it was possible for scholars to use the technique in the context of academic research without restriction (Zaltman, 1997). The patent

has expired since 2013, so the process itself is in public domain now. However, the ZMET name is still a registered trademark owned by Olson Zaltman Associates LLC. That means if a researcher is using it outside academia, then he/she could still use it but would not be able to call it ZMET. This is something that teachers also need to be aware of especially if they are introducing students to this technique while at university.

Table 1
The ZMET Process

1	Picture collection	Participant collects pictures over 7-10 days prior to the interview. They can take photos from a camera or collect from sources available to them such as books, magazines, etc.
2	Storytelling	Participant is asked to describe the salient content of each picture they bring to the interview.
3	Missed images	Participant is asked to describe pictures they wanted to find but could not.
4	Sorting	Participant is asked to sort images into meaningful sets if they have brought more than 15 images.
5	Construct elicitation	A modified version of the Kelly Repertory Grid is used where participant is asked to randomly select 3 pictures are asked to explain how any two are similar and yet different from the third. Laddering on the constructs elicited continues until the constructs that are surfaced become redundant.
6	Metaphor elaboration	Techniques from art therapy are used in this stage. The interviewer selects several pictures and asks participant to widen the frame of the picture in any direction or dimension and to describe what would enter the picture that would reinforce (or sometimes contradict its meaning).
7	Sensory images	Participant is asked to use nonvisual senses to convey what is and is not representative of the concept being explored.
8	The vignette	Participant is asked to imagine a short movie that describes their thoughts and feelings about the topic.
9	The digital image	Participant co-creates a summary image or montage that expresses the topic under study.

Adapted from Zaltman (1997)

The ZMET method seemed to be appropriate for my investigation which was about gaining insights into the thoughts and feelings of beneficiaries of a charitable organisation using interpersonal relationship metaphors drawing from brand relationship theory. However, I found that the researcher wishing to experiment with ZMET might not find enough sources that describe the practical experiences of other academic peers experimenting with this interview technique. Some papers have provided sanitised explanations of the process used in their research (e.g., Khoo-Lattimore & Prideaux, 2013; Lagerkvist et al., 2015) or how the process has been adapted giving specific constraints encountered on the field (e.g., Kokko & Lagerkvist, 2017), but detailed accounts of the experiences of a qualitative researcher experimenting with ZMET for the first time are not available. Therefore, in this paper, I provide some insights into my experience with ZMET which reveal practical issues that could be valuable for inexperienced qualitative researchers (Kapoulas & Mitic, 2012).

Context and Method

The use of ZMET was experimented in a study that was set within a non-profit organisation in the UK. The main aim of the study was to gain insights about how the beneficiaries (defined as those people benefiting from the services of this charitable organisation) felt about their relationships with the charity as an organisational brand. Non-profit organisations are operating in an increasingly competitive environment where they must compete to get their voices heard, to get more funds, to attract volunteers, to be top-of-mind in their respective sectors, to lobby for their causes, and so on (Hankinson, 2001). Hence, many charities nowadays have realized the importance of branding (active management of the organisation as a brand) to better position themselves in such a demanding context. The management team of this national healthcare charity realised the importance of gathering insights from various internal and external stakeholders to better understand their brand.

Drawing upon brand relationship theory, that is, the brand as a relationship partner (Fournier, 1998), the researcher planned to encourage participants to use interpersonal metaphors to express themselves, and sometimes the researcher would also use such metaphors during the interview hence adopting both the researcher metaphor and consumer metaphor approaches (Avis et al., 2012). Therefore, metaphors were proposed as a heuristic to facilitate understanding and explanation of relationship dimensions identified (Avis et al., 2012). In the past, most of the research undertaken by the charity focused on direct beneficiaries with surveys trying to gain more information on the medical and health side of things with a view to enhance service delivery. This time, the intention was to probe more into beneficiaries' thoughts and feelings about their perceptive relationships with the non-profit brand. An exploratory qualitative approach drawing upon brand relationship theory was suggested and the researcher proposed to experiment with the ZMET method in the first place. The main reasons were that the combination of projective techniques of the ZMET process could potentially allow for a deeper access to the minds of the consumer (Zaltman, 1997) as well as allowing for the participant to use alternative modes of metaphoric expression rather than relying only on the verbal (Rook, 2007). In order to confirm the current policy of the patent holders, I contacted both Prof. Zaltman and Lindsay Zaltman (CEO of Orson Zaltman Associates) in January 2012. They both confirmed that I could use the tenets of ZMET and develop my own version. This implied that I would not be necessarily using the procedure identically as it was patented, but I would be drawing upon the principles published in previous academic papers. I also planned to lay more emphasis on interpersonal metaphors given the nature of investigation (brand as relationship partner).

Recruitment of Participants

The next step was to recruit participants to collaborate with the study. My first tactic was to attend an activity organised by the non-profit organisation within its headquarters where beneficiaries would be present. I conducted a brief PowerPoint presentation in front of a dozen people explaining the aims and objectives of the study and well as the ZMET interviewing technique. This was followed by a Q&A. After my presentation, I continued to chat with several volunteers whom I felt could be potentially interested to participate in the study. My judgement was based on the way they were engaging with me and the comments and observations that they were sharing with me already. During that session I managed to recruit six participants and I told them that I would call them at a later stage to schedule an interview. Five accepted to be interviewed in the end. I got the impression that some of them were just intrigued by the ZMET interview process and wanted to give it a try. A few days after the ZMET presentation, I called each participant to fix an interview date in their houses or in a place of their choice. I

explained again the importance of collecting pictures that would represent their thoughts and feelings about their relationship with the non-profit organisation. While interacting with them, I felt that it might be an additional burden for them to take a camera and shoot pictures (as in other ZMET studies). Therefore, I asked them to find pictures that would be available around their homes such as from cut-outs from old magazines and newspapers, printed photographs from their own collections, or any other sources that they would find relevant.

Discussion

In this section, the various issues encountered throughout the ZMET interviews are discussed. I also provide some recommendations on how these issues can be dealt with based on my own experience on the field.

Collection of Pictures

ZMET is highly reliant on the photos/pictures that participants need to be gathered beforehand. We found that in previous studies using ZMET, researchers have tried to facilitate this process by using different approaches such as providing a disposable camera (Lagerkvist et al, 2015) or by providing materials for participants to skim through (Kokko & Lagerkvist, 2017). In my case, I was faced with an additional issue – participants that told me that they could gather the pictures without problem but do not manage to do it for various reasons. Therefore, I recommend to novice researchers to have a check on the participant a few days after the initial briefing to see how they are getting on with the process. If there are struggling with the photo collection, then other alternatives can be considered. I was also faced with the perceived complexity of the activity itself. I had three interviews cancelled because while participants expressed at first their willingness to be interviewed, they changed their minds when I explained that they needed to collect pictures one week before the interview. It is important for researchers to consider the profile and level of aptitude of participants when asked to collect pictures and not make assumptions that everyone will be able to undertake this task with relative ease. Therefore, I would recommend that researchers to have a close monitoring of participants during that phase of picture collection. Researchers could also provide some ideas regarding alternative sourcing of pictures/visuals if the participant is struggling with the collection process due to various circumstantial matters arising (e.g., weather, health, work/family obligations, etc.).

Beneficence and Non-Maleficence

Given the profile of my participants, I made sure that due care was taken not to indirectly cause harm to anyone through the interview process through probing the recollection of certain issues that could be distressing for the participant (Walker, 2007). The interview was also conducted in a way where particular attention was taken to make the participant at ease, and I did my best to be “caring, empathetic, patient and compassionate” (Dickson-Swift et al., 2007). However, participant tiredness is another important aspect that ZMET researchers need to bear in mind (Zaltman & Coulter, 1995). This could be manifested in different ways depending on the target group being interviewed. This is where the researcher needs to be attentive to body language cues and not hesitate to resume the interview when there are indications that the participant might start feeling physically or emotionally tired. It is the responsibility of the researcher to ensure a sensitive approach to interviewing (Dickson-Swift et al., 2007).

Self-Disclosure and Rapport

Developing rapport has been acknowledged as a sensible issue in qualitative research and researchers need to “initiate a rapport-building process from their first encounter with a participant in order to build a research relationship that will allow the researcher to access the person’s story” (Dickson-Swift et al., 2007, p. 331). I also felt that it was important for me to develop a connection with the participant first before probing into the main themes to be discussed. In that respect, I had no issue in responding to some personal questions that were asked by participants, since I felt that “self-disclosure could enhance rapport, show respect for the participants, and validate the participant’s stories” (Dickson-Swift et al., 2007, p. 332). Self-disclosure and sharing of my personal experiences allowed for a better conversation and created an environment that lessened the “hierarchical nature of the research process” (Dickson-Swift et al., 2007, p. 334).

Digital Imaging

The backbone of ZMET is the physical face-to-face interview which culminates into the creation of a digital collage. Previous ZMET research suggest the help of a graphic technician (Zaltman & Coulter, 1995) to assist the participant in generating this drawing. In my case, I decided to do the manipulating myself using a relatively easy-to-use photo editing tool with solid capabilities. Given that I conducted most interviews in the participants’ houses, This allowed for a less disruptive experience for the participant. Co-creating the image together with the participant was itself an enjoyable experience that reinforced the rapport built over the interview. It also allowed for member-checking in a more relaxed and fun way. However, it can also be time-consuming process. The novice academic researcher might also consider spending some time learning the rudiments of digital image creation before the data collection phase There are nowadays freely accessible digital software for photo manipulation (e.g., the open-source free software GIMP as an alternative to other expensive photo editing software) as well as practical photo manipulation tutorials available online (e.g., YouTube channels).

Figure 1

Example of ZMET Digital Image Co-Created With Participant



Non-Linearity of Process

It can be quite easy for the qualitative researcher to be seduced by the ZMET appeal – a process which has been very well thought-through and packaged. That could lead into some researchers not spending adequate time on presuming the principles on which ZMET is derived from and the projective techniques that have been borrowed and adapted. I believe that it is important for researchers to carefully study the different fields of inquiry first, so that they can adapt or even design their own interview process if they face challenges or constraints faced on the field. The aspiring ZMET practitioner also needs to bear in mind that it might not be possible to follow the ZMET steps in a linear way. This is something that Zaltman and Coulter (1995) also mentioned in their experience with ZMET: “each step can be introduced in different ways and individual differences among customers may call for somewhat different approaches” (p. 48). I also found that some participants could struggle with some techniques (such as the vignette) so I had to adapt accordingly and in some cases skip some of the steps so as to adapt the interview based on the responsiveness of the participant.

Data Analysis

ZMET interviews may generate different types of data which would include the interview transcript (sessions were audio-recorded using my phone app with the permission of the participant), the visual materials from the participants and the final digital image co-created by the participant. I found that the most appropriate method to analyse all the data gathered was through a thematic analysis with specific attention to metaphoric expressions. The analytical process proposed by Zaltman and Zaltman (2008) was used as guiding principle where surface metaphors (i.e., idiosyncratic verbal and visual expressions) were first searched in the data set. These were then analysed thematically to find shared metaphor themes based on the initial research question (thoughts and feelings of their perceived relationships with the charity brand).

Conclusion

The nature of qualitative research is such that it can be unpredictable and messy, so researchers need also to be aware of this aspect. I found it very challenging to follow the step-by-step ZMET procedure for two main reasons. The first reason was that each participant was in a different state of mind during the interview and it was their mood that guided the interview. As an interviewer, I felt that I should adapt the process to their state of mind instead on trying to impose a procedure on them which they might find difficult to engage with. For instance, some participants found it difficult to engage with projective techniques like sensory images, vignette or art therapy. I had to adapt these techniques several times and sometimes I felt that it was not as obvious as it sounds for an individual to engage in such projective techniques. Based on my personal experience with ZMET, I suggest some recommendations to novice ZMET researchers as follows:

- Spend time studying the techniques that ZMET draws from and practice each of these techniques individually before embarking on the whole process.
- Consider the first ZMET interview as a pilot study and do it with a participant that is most likely to be representative of the sample (if applicable).

- Be prepared to adapt the steps depending on how participants are engaging with the process and bear in mind that some people might find it difficult to engage in some of the projective techniques.
- Be aware that this process can be unpredictable and messy, so if you feel that ZMET is not working for you, then do not hesitate to consider an alternative method that would be more suitable to your research context.

ZMET is a process that combines different techniques from the social sciences applied to marketing-related research. It is a powerful method that could potentially allow the researcher to tap into the buried feelings and emotions of participants allowing for the generation of deeper insights. However, there are also several challenges that the researcher might face depending on the knowledge/experience in qualitative interviewing, the profile of participants, time and resources available. It can be easy to be seduced by the seemingly simplicity of the procedure but putting theory into practice is another story. A thorough study of the projective qualitative techniques on which ZMET is based is essential. This could also allow researchers to develop their own metaphor elicitation interview process which could be more suitable to their context of study.

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Author Note

Dr Tauheed A. Ramjaun is a Senior Lecturer in Corporate & Marketing Communications in the Faculty of Media & Communications at Bournemouth University. His research interests include corporate communications, brand identity, online brand communities, and digital consumer activism. Prior to joining academia, he worked for several years within the advertising and communications industry where he was involved in various types of promotional communications projects (e.g., brand identity developments, new product launches, public awareness campaigns) at both tactical and strategic levels. Please direct correspondence to ramjaun@bournemouth.ac.uk.

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