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# **Pocket Guide to Basic Marketing Research Tools**

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# Pocket Guide to Basic Marketing Research Tools

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## Preface

This Guide is aimed at those new to the marketing research field. For seasoned professionals, it may annoy you: the sins of omission are many. A definitive guide to marketing research tests will remain elusive, as the field is vast and ever-changing. My objective in writing this Guide was to cover, at a very high level, about 70% of the most common commercial marketing research tests being conducted now. New methods of obtaining insights and feedback are appearing every day, so it is an exciting time to be in the field. I hope to update this Guide as more methods are established and I have more time.

That being said, the core study designs that worked 30 years ago have not really changed, and are unlikely to change, because they work. This is true for in-person and digital data collection modalities. These core designs help marketers better listen to customers, develop hypotheses, evaluate ideas, and optimize the marketing mix. We use them all the time.

There is no one “right” way to execute good research, but there are many ways to execute really bad research – and I have seen my share. Remember that, as a researcher, *you are the conscience of the business*. Marketing managers come and go, methods come and go, trends come and go. At the end of the day, the most valuable asset that your company has (besides you!) are its people and brand integrity. You are the firewall that protects brand goodwill from the heavy hand of ignorant sales and marketing managers.

Research can be conducted in a “classical” sequence (starting with qualitative and moving into a variety of quantitative studies) but don’t let that get in your way. Ask yourself: is the chosen research method appropriate for the problem at hand? That is always the true test.

I have not addressed the issue of online sampling. At the time of this writing, the sample industry was in a state of crisis. Online consumer panel respondents are recruited using a variety of questionable methods with little transparency. Anecdotal evidence indicates larger-scale operations designed to intentionally falsify results and thwart data reliability. Current methods of vetting and validating real respondents are not foolproof. Much more work clearly needs to be done in this area. Our industry is grappling with a solution. Big data is not the answer: we will always need to know “Why?”.

Happy researching!

Bob Walker  
Surveys & Forecasts, LLC  
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### **Quantitative Research: Concept/Idea Screening**

Concept/idea screening tests are research designs that reduce (i.e., screen) a large number of conceptual ideas (e.g., 15, 20, or more) into the group worth pursuing vs. those that should be rejected.

#### *When Used*

Concept screening is typically undertaken after (1) a segmentation or market study that has identified new marketing opportunities; (2) exploratory qualitative research that reveals a consumer need; (3) group ideation or brainstorming sessions; or (4) R&D/product development has identified a significant number of possible new product ideas. However, concept screening can be conducted at any time there are enough ideas to test.

#### *Stimuli*

Because the objective in concept screening is to identify winning ideas from a large pool of candidates, the screening process and concept format must be efficient. Unlike most concept tests, screening designs expose many ideas to each respondent. The number of ideas exposed varies based on the number to be tested. Concepts can represent completely new ideas, line extensions, or new uses/repositionings of existing products. Mechanically, concepts for screening tests are more basic than those used in traditional concept research. Specifically:

- Concepts are brief (e.g., 3-4 sentences), and factually state the problem, usage situation, or need, and then how the product meets the need or solves the problem.
- Versus traditional concepts, the state-of-finish for concepts used in screening is basic/low. The amount of detail varies, depending on the types of ideas or the category.
- Concepts may or may not be branded, or include a basic visual (e.g., B&W line drawing), price, quantity/size, or packaging information. Generally, these are not included.

#### *Concept Screening Designs*

The two common designs are “pure” vs. “diagnostic” screening. Pure screening is strictly evaluative (i.e., no diagnostics). It is typically used when there are many ideas to test and they are in basic form (i.e., a few sentences and low state-of-finish), thus permitting one respondent to see them all. For each respondent, concept exposure is randomized, with each concept rated and ranked on:

- Purchase interest
- Expected frequency of use
- Uniqueness, Believability
- Optional: need fulfillment, superiority, relevance.

In diagnostic screening, both evaluative and diagnostic measures are collected. Again, multiple concept exposure occurs, but in randomized groups of 3-6, depending upon the total number of concepts (i.e., incomplete block design). Concepts in diagnostic screening tests are in a higher state-of-finish than those used in pure screening. Each concept is rated (not ranked) on the same as the above, plus:

- Voluntary positives (e.g., likes, advantages)
- Voluntary negatives (e.g., dislikes, disadvantages)
- Attribute ratings (limited list, usually 5-8 items)
- Optional measures, time permitting (need fulfillment, superiority, etc.)

### *Sample Frame*

In both approaches, a broad, general audience of respondents (e.g., males/females ages 21-64) is used. This puts all ideas on an “equal footing”, so that decisions about resources can be made without regard to different target definitions. As necessary, the basic sample is supplemented with key groups for additional target group precision.

Sample sizes are usually in the 150-200 exposures *per concept* range. Note, however, that the total sample size is driven by (1) the number of concepts, (2) the number shown to each respondent, and (3) the desired number of concept exposures. (For example, 12 concepts shown 3 at a time to 150 respondents requires a total sample of 600.) Study costs depend on screening requirements, the number of concepts, and required number of exposures/final sample size.

Other factors to keep in mind when conducting concept screening:

- All concepts should be created using the same format.
- The inclusion of control concepts in concept screens is highly recommended for benchmarking purposes.
- Consistency in format, screening, geography, and question sequence is important for future historical comparison purposes.

### *Action Standard*

Action standards are based on purchase interest and company norms or a threshold level (e.g., pursue if 25%+ “definitely will buy”). Weighted trial values can also be calculated.

### *Pros & Cons*

Pros: Fast, efficient screening tool, with the ability to establish norms over time.

Cons: Unless numerical benchmarks are established, harder to identify winners from losers. Also, concept screens may be less appropriate for products that depend on mood or tonality (e.g., fragrances), or for products that create entirely new categories (e.g., technology).

### *Timing*

Cycle time (excluding stimuli preparation) from field start to an initial presentation is typically 2-4 weeks (assuming online sample/exposure).

### *Subsequent Steps*

Concepts that meet objectives on specific measures (e.g., purchase interest) receive additional resources, and continue to the next stage of development (concept testing). However, it is also possible to take the winning ideas to a round of qualitative research to better understand consumer reactions, and further develop the ideas.