FOCUS GROUP RESEARCH PROJECT PLANNING

Empower Your Research Partner

All MarketLink focus group research is customized to meet the specific learning requirements of each individual project. To assure that our proposed research program legitimately satisfies the unique needs of your specific project, we need to receive from you certain information about the intended research and, as importantly, about the relevant underlying marketing issues. This information – which we treat confidentially – provides us with important insights that will help guide our recommendations on research design and help us to coordinate and execute on your behalf the most appropriate and effective focus group research.

Every qualitative research project has a number of distinct phases, and each phase calls for a certain type and content of communication between client and resource. As is true in most collaborative ventures such as qualitative research, the better the communication among the partnering marketers, the better the resultant learning. Simply put, we have the best chance of satisfying your expectations for MarketLink research when you empower us to understand as much as possible about the business dynamics and issues that underlie and surround it. Empowerment in this case comes from shared knowledge.

In the pages that follow, we offer specific guidelines for what we regard as the most crucial components of shared knowledge. In all cases, these are necessary foundational inputs that the client should provide at the important preliminary phase of research planning. This is the phase that culminates in the recommendation of research methodology and the calculation of corresponding estimates of cost.

There is a strong temptation to short-cut this foundational phase of research planning. After all, it requires additional time and effort from all of the partnering marketers. But this investment of time and discipline pays-off in the form of more intelligently designed research, more reliable data and more actionable learning.

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Guidelines For MARKETLINK Client Input On Project Specs

- START AT THE BEGINNING

Among the most beneficial insights you can provide are those that can be characterized as background. Most likely, before you ever contact MarketLink about a given research assignment, you will have spent countless hours in meetings and discussions hashing through the myriad development and planning issues related to the project. All of these internal planning and development experiences leading up to the need for research certainly helped to forge your opinions and hypotheses about the implicated research. In the same way, this background information will help your MarketLink research consultant to begin to develop a framework for thinking about potential research solutions.

Although the exact amount and type of background would be tailored to the complexities of each new project, following are examples of relevant background details that you should entrust to your research partner:

- How far along are you in development – whether for a product concept, positioning strategy, or advertising creative?
- What assumptions have you made regarding primary and secondary consumer targets? Who are they demographically, behaviorally, and attitudinally or psychographically?
- How have you defined the competition, and – by name – who are they: by product category, by distribution channel, by price tier, etc?
- What hypotheses have you made concerning source of volume (or other benefit) for your brand or company? What specific consumer behaviors and attitudes will be affected or influenced, and why?

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- ARTICULATE THE RESEARCH OBJECTIVES

On the surface, this seems to be such a basic and obvious step in the focus group research planning process that some may wonder why we would include it at all among the important MarketLink research client inputs. Objectives – in one form or another – are rarely missing from clients' requests-for-proposal. But, too often, the objectives are stated in a manner that is unclear, incomplete, or misleading.

A very useful discipline for marketers who are thinking about research objectives is to adopt a mindset that allows them to look beyond the research – to envision its outcome. From this "future" mindset, marketers should develop answers to the following kinds of questions and include these insights among other inputs provided to MarketLink:

- What learning must this research yield that is important to the further development of the concept, product, strategy, etc? And, what is the hierarchy among these key learning issues – which are "need to know", which are "like to know", and which are "nice to know."
- How will the learning from this research be used? What decisions and actions will be driven by or rooted in the research learning? Pending the results, what developmental steps follow the research and how will those steps be influenced by the learning? Generally, what's at stake?
- Are the learning objectives appropriately explored via focus groups? Are our key issues really qualitative in nature, or are they quantitative?

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- GET THE RIGHT RESEARCH PARTICIPANTS

From a previous section, the assumptions you have made with respect to the primary and secondary consumer targets will have already provided MarketLink with valuable insights about respondent qualification. The focus here is on additional criteria by which participants for the research might be screened.

A common mistake in the design and execution of qualitative research is to begin specifying respondent-screening criteria too soon in the planning process. Only after you and your research partner have achieved a common understanding about the relevant background leading up to the research and the objectives that must be met by the research should the question of respondent qualification be seriously addressed. The insights from the former lead logically and naturally into the latter.

In most cases, focus group respondents represent a highly qualified – and not random – sample of a relevant universe. The very nature of this research medium encourages marketers to manipulate the demographic and psychographic make up of the people who sit around the focus group discussion table according to the unique requirements and opportunities of the focus topic. For example, rarely do we look for just grocery shoppers in a food-based study. Rather, we look for grocery shoppers of a particular gender and within certain age and income ranges; people with a certain household structure; and so on.

One of the key drivers of the cost of qualitative research is incidence – the rate at which qualified participants are found. All of the respondent qualification criteria combine to make up the incidence for each individual project.

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Guidelines For MARKETLINK Client Input On Project Specs

- GET THE RIGHT RESEARCH PARTICIPANTS – Continued

Following are examples of some of the more typical respondent qualification criteria. Your specifications on these and other relevant respondent screening issues empower us to speak intelligently with the field services whose bids for recruiting and hosting participants for the research are reflected in the MarketLink project estimate:

- By what demographic criteria should respondents be screened? …What should respondents "look" like in terms of gender, age ranges, marital status, household composition, income, education, employment status, race and ethnicity, etc.
- By what category and brand criteria should people be screened? …What are the specific category purchase and/or usage behavior screening criteria? …Are frequency and/or recency of purchase relevant and important? …Should discussion participants have any particular brand experience and/or brand preference? …Is it necessary to screen for where purchases are made or where consumption occurs?
- By what other behavioral or attitudinal criteria should respondents be screened? …Is it important that we screen for pre-dispositions toward certain product types and/or brands? …For example, in a food project, we might screen for the tendency to make and eat certain meals, for the inclusion of a certain type of food in certain meals, or for the purchase and/or consumption of other, kindred foods. …As another example, if the project were to explore positioning alternatives for a new product, we might screen for positive purchase interest in a product concept.

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- DO THE RESEARCH AT THE RIGHT TIME AND PLACE

A host of issues related to the timing and logistics of the research combine to represent another formidable cost driver in qualitative studies. Among the inputs you give to MarketLink should be answers to as many of the following questions as possible:

- What are the important timing considerations for this research? …On the basis of known critical marketing decision-making dates, when must the data be in hand? …Are there any dates on which key client personnel or outside resources are not available to attend? …If multiple cities are involved in the project, does the city sequence matter?
- What markets are relevant to this research based on either CDI/BDI criteria or on the dynamics of the competitive frame? Is there a list of acceptable alternative markets from which we might select test cities?
- Is it known in advance how many individual focus groups or in-depth interviews (IDI's) are desired? In the absence of such a specification, MarketLink would make a recommendation on number of groups on the basis of stated learning objectives, respondent qualification criteria, and/or budgetary constraints.
- Is a certain group (or IDI) length desired? The standard length of a focus group is from 1½ to 2 hours, and IDI's are usually under a ½ hour in length. Do the number and scope of the issues warrant consideration of non-traditional session lengths? Longer sessions often prove to be preferable to cramming too many issues into a traditional time allotment.

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- CONSIDER OTHER SPECIFICATIONS FOR THE RESEARCH

In addition to the other described client inputs, there are some “miscellaneous” specifications for qualitative research that do not fit neatly into any of the other categorizations but which impact the cost of the research nevertheless. Following is a checklist of the most common of these additional specs:

- Should the group discussions (or IDI’s) be video-recorded? All research facilities include audio recording of the research sessions as part of their standard fees, but only a few include video recording at no extra charge. “Stationary-camera” video-recordings may be specified (if the tapes will be used only for internal informational purposes) or the more costly “operator-assisted” videotaping may be specified if close-up shots and/or anything beyond static-camera views are needed.

- What additional facility services – other than recruiting respondents and hosting client and respondent participants – will be needed? For example, in the case of a food-related project, will we need the use of the facility’s kitchen and, perhaps, a kitchen helper? Will we rely on the facility to acquire any competitive samples or any of the other stimulus materials we will use in the research? What special foodservice or beverage requests are there? …And, for how many client attendees? Are verbatim transcripts of the research discussions needed?

- What MarketLink reporting format is desired? A standard MarketLink top-line report is comprised of an Executive Summary, Conclusions and Implications, and a more-detailed, top-of-mind account of the Research Findings. A typical length of this standard report format is between 15 and 25 pages. Report formats of more or less detail may be specified.

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Guidelines For MARKETLINK Client Input On Project Specs

- THE MARKETLINK COMMITMENT

We are totally committed to the successful design and execution of qualitative research conducted on behalf of our clients, and we consider it a privilege to be entrusted by our clients to partner in some of their most important and most costly business development initiatives.

We acknowledge and understand both the strengths and weaknesses that are unique to qualitative research, and we pledge to use our experience to help our clients make the best and most appropriate use of this research methodology.

We know that research findings can sometimes deviate substantially from the expected and that the resultant conclusions and implications from the research can prove to be critical and unflattering to the client's brand, product or idea. We pledge to report and interpret the learning from our research to the best of our ability in an honest and forthright manner – with sensitivity to our partnering marketers but without sugarcoating and without any intentional distortion.

We invite questions and comments concerning the guidelines we have described and suggested on these pages. Please contact us in any of the following ways:

- Telephone: (229) 228-1224
- Facsimile: (229) 228-6911
- E-mail: mbixler@rose.net

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MARKETLINK Client Planning Checklist

- ❑ Assess The Situation
  - ♦ Answer "why" we need to do this research
  - ♦ Formulate hypotheses about the focus topic
- ❑ Envision The Outcome of the Research
  - ♦ Think about how the learning will be used
  - ♦ Anticipate next steps after this research; pending decisions and actions
- ❑ Develop Learning Objectives
  - ♦ ID what must be learned that isn't now known
  - ♦ Stay focused; don't lose sight of the main reasons for the research
  - ♦ Prioritize learning issues: "Must learn" versus "Would like to know"
  - ♦ Make sure all issues are qualitative in nature
- ❑ Request For Proposal (Input To Give Your Research Resource)
  - ♦ Background: situation assessment, relevant hypotheses
  - ♦ Learning Objectives: prioritized according to "need", "want", and "like"
  - ♦ Respondent Screening Criteria: including incidence rates if available
  - ♦ Logistical Criteria: city lists, group number/length, timing parameters
  - ♦ Other: special facility needs, video-taping, special foodservice needs, and desired report format

Requests for proposals are welcome by phone **(229) 228-1224**, by fax **(229) 228-6911**, by e-mail (mbixler@rose.net), or by mail:

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