Quantitative Research 101: What to ask, what to mine, and why?

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PRESENTATION TOPICS

Why and How to Conduct Research

- Go beyond demographics – the real person test
- Goal to understand industry, brand, competitors, and customers from customer point of view
- Big Data only as useful as the questions we ask of it. Even then, it can fall short of providing real insight. Often it tells us what's happening, but not why.
- Don't conduct research unless you plan to act on it; "nice to know" is not actionable.
- Understand key differences between qualitative and quantitative research
- Research objectives drive whom and how to survey, content of survey instrument. Other factors to consider include sample size, cost, speed, and bias.

Basics of Survey Design

Introduction:
- Establish importance and relevance
- Guard against bias or unintended influence on survey itself
- Confirm confidentiality and legitimacy
- Set expectations – on time, use of data

Screener:
- No list is 100% accurate
- Screen specific types of consumers in or out of the survey
- Fill survey quotas

Order:
- General → Specific (but start with an easy question)
- Unaided → Aided
- Impact of one question on another
- Logical flow
- Demos/other sensitive questions at end (except as needed for screening/branching)

Simplicity:
- Use clear instructions
- Skip/branch to improve relevance
- Ask one thing at a time
- Clarity in reference frame (time, purpose, location, etc.)

Wording matters:
- Jargon police!
- Objectivity
- Careful with examples

Scales:
- Avoid "neutral" / "no opinion" options when possible
- Label scale ends or (very carefully) individual scale points; N/A
- Use scales consistently throughout the survey
- Match question wording
- Consider appropriateness of scale

- Avoid grid overload
- Avoid ranking questions

Open-ended questions:
- Generally, limit open-ends in quantitative research
- Provide list of responses unless intentionally open-ended
- Primary benefits of open-ends are:
  - Qualitative understanding
  - Diagnostics for quantitative responses
  - Capturing unaided feedback
  - Capturing "other" responses that were not considered by the researcher

Customer Satisfaction questions

Data useful for analysis

Data Analysis

General process:
- Revisit research objectives
- Develop analysis plan based on research objectives
- Examine total responses – counts/percentages for each question
- Data validation and cleaning
- Determine key subgroups for analysis
- Continually question how the data can be used to help inform decisions

Processing open-ended data:
- Typically, two types:
  - Completely open-ended response (word, phrase, paragraph)
  - Description of "Other" response
- Consider whether coding large number of responses -- particularly longer ones -- is effective or necessary.
- If substantial percentage of "Other" responses, evaluate if clear patterns worth categorizing
- Consider interpretive bias that the reporting of open-ends can produce
- Coding of open-ended responses is laborious, time-consuming, and subjective – but can be worth it

Reporting open-ended data:
- In reporting, relate to objectives, share question wording, and provide context
  - Example: Unaided awareness
- Carefully label, reinforce relationship to quantitative data, and give appropriate emphasis
  - Example: Reasons for dissatisfaction
- Be careful in the selection of "representative" quotes
  - Example: Longest, most astute, most clever, most extreme usually not best candidates

Recap:
- **Research objectives drive EVERYTHING!** (and organizational needs drive research objectives)
- **Survey Design:**
  - Optimize respondent experience – short, simple, clear, relevant
  - Question order matters, wording matters, scales matter
- **Data Analysis:**
  - Validate and clean data before analyzing further; address small bases and missing data
  - Consider best ways to compare subgroup data before setting up outputs
  - Increase confidence in data analysis by integrating data from different sources