# Market Research

Trainer
Dr. Eva Bozilovic Schrack

Generalitat de Catalunya
Departament d'Empresa i Treball

Cofinançat per la Unió Europea

Subvencionat pel Departament d'Empresa (**Programa Primer)** i amb el cofinançament del Fons Social Europeu Plus

# Before Anything


- ✓ Leading the change in society
- ✓ Having ideas with triple impact
- ✓ Passing the screening pitch for Agritech



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# Several Milestones to Come

- Social Pitch
- Sales Pitch
- Investors Pitch

- You Need To Show Data



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# About Me

Adjunct professor at GBSB and other business schools

- Market Research
- Marketing of Innovations
- Social Entrepreneurship
- Technology & Innovation in Fashion & Luxury
- Doing Business in Europe
- Marketing Mix
- Marketing Principles & Practice
- Marketing in Fashion & Luxury
- Luxury Principles & Practice
- Sustainable Tourism

Tutor and Committee Member Theses
Master and BBA

Career Coach with Master Students

Contact:
eva.bozilovic@faculty.gbsb.global

LinkedIn
https://www.linkedin.com/in/evabozilovic/

# Education & Work Experience

Education

PhD  Management & Business
MBA Communications & PR
MBA Tourism & Leisure

Marketing and Business Consultant
Marketing Manager - International fashion company
Marketing Manager - Steel industry
Marketing - Telecom industry
Marketing and operations consultant - Hospitality

Mentor and trainer at G-Accelerator
Start Up companies with and without social aims

Consultant Brandarte
BRANDARTE | LinkedIn


LA VANGUARDIA

*La barcelonina Grotesque Shoes ven la meitat de la producció a l'exterior*

**Sabates lliures de químics**

ARIADNA BOADA
Barcelona

El dissenyador holandès Geert Slaats, creador de firmes de calçat com Rockport i Yellow Cab NY, va fundar Grotesque a Barcelona l'any 2006. Es tractava de crear una firma de sabates exclusives per a home i dona, i un any més tard, Eva Bozilovic, d'origen serbi i establerta a la capital catalana des de fa 10 anys, es va afegir al projecte.

"Vam veure que al mercat hi havia un buit per a les sabates ecològiques, lliures de químics, i que alhora tinguessin un gran component de disseny. En aquesta sintonia vam començar a dissenyar models atrevits inspirats a i per a Barcelona", explica Bozilovic.

El 2011 van obrir la primera botiga pròpia a Holanda, a la



KIM MANRESA



**Hi ha qui deixa petjada**

Les sabates Grotesque presumeixen de disseny holandès, fabricació europea i peus lliures de química. Des de la seva botiga del Raval, auguren un estiu ple de color. Per **Laia Beltran**

**Geert Slaats és al darrere d'unes sabates que sorprenen i provoquen**

# Your Deliverables of the Training

- Research brief
- Research form preparation (Word)
- Research tool execution (Google Forms)
- Data collection
- Research analysis
- Research report
- TAM SAM SOM



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# Market Research Training Topics

**The topic to be covered in today´s training:**

- Introduction to Market Research
- Market Research Process
- Designing Market Research
- Qualitative Research
- Quantitative Research
- Research brief design and preparation



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# Startups Must Do Market Research

- It is a must to gather principal facts **before spending a lot of time and money on the startup**.
- Gaining real-time responses will make it easy for you to **adjust your product in the initial stages** of business.
- It will give you a chance to **identify mistakes and shortcomings sooner**
- It will get you prepared to take **corrective actions**.
- Collecting the right data is your key to **starting on a positive note** in the business world.



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# Question: Have you participated in other Incubators/Accelarators

No

Yes



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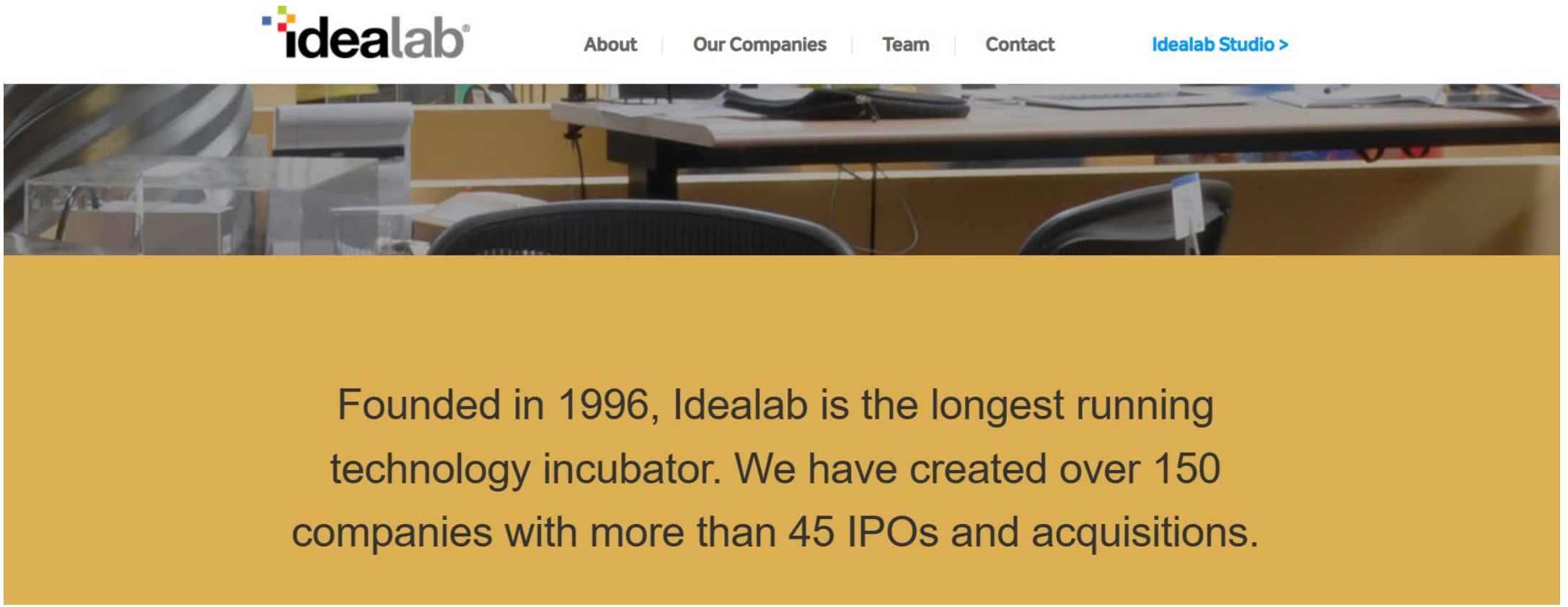
# Learn From The Best Incubators/Accelertors




Idealab

# Success Factors for Startups

Some of the IdeaLab Startup companies are :

**AirBnB** Book accommodations around the world

**Dropbox** Backup and share files in the cloud

**Stripe** Payments structure for the internet

**Scribd** World´s largest online library of books and audio books Scribd

# Success Factors for Startups

**Bill Gross - Chairman**
Founded Idealab in March 1996.
Bill is a lifelong entrepreneur, starting his first solar business in high school.

He has founded a lot of start-ups and incubated many others and he got curious about **why some succeeded and others failed**. So, he gathered **data from hundreds of companies**, his own and other people's, and ranked each company on five key factors.

He found one factor that stands out from the others and surprised even him.

Follow Bill on Twitter
Bill Gross: The single biggest reason why start-ups succeed | TED Talk



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# Question: Which Factor is Critical?

A - Idea

B - Team / Execution / Adaptability

C - Business Model

D - Timing

E - Funding



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# Factor Critical for Success is:

D – Timing

While a startup's success depends on various factors, **timing is essential** as it can significantly influence market dynamics, competition, consumer behavior, funding, and overall market acceptance.
Choosing the **right time to launch a startup** can give it a **head start** and increase its chances of achieving long-term success.



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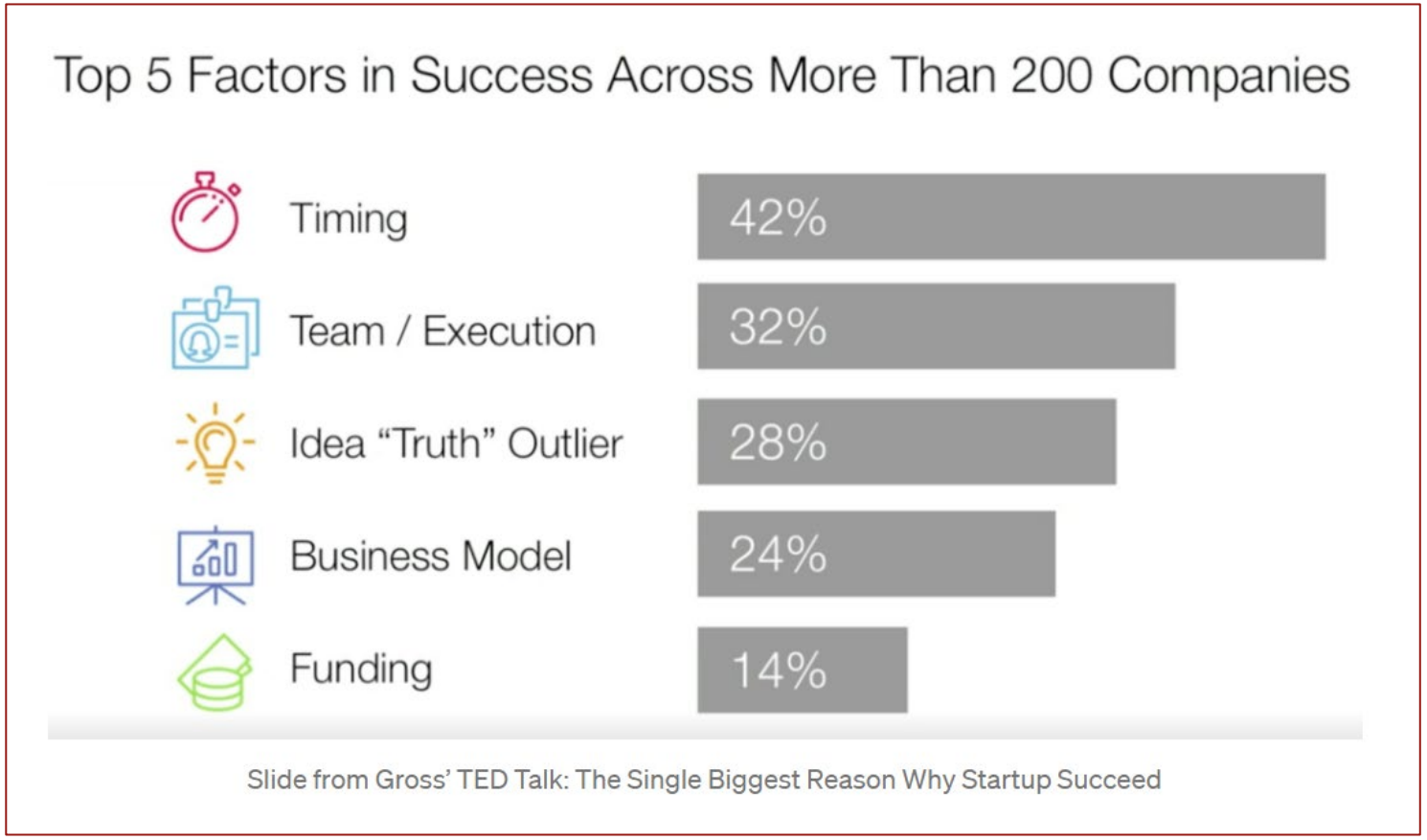
# Success Factors for Startups



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# Time is a Critical Factor for Many Aspects:

- **Market readiness**: A great idea or product might not gain traction if the market is not ready for it. Timing a startup when there is a genuine demand or problem to be solved increases the chances of success. Entering a market too early might result in limited adoption, while entering too late may lead to intense competition.

- **Competition**: The timing of a startup can determine the level of competition it faces. Being **first-to-market can give a startup a competitive advantage**, but it can also come with challenges like educating the market and building brand awareness. Entering a market with established competitors can make it difficult for a startup to gain a foothold.



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# Time is a Critical Factor:

- **Technology and infrastructure**: Technological advancements can make or break a startup. Entering a market when the necessary infrastructure and technology are available can **streamline operations and improve efficiency**. For example, the rise of the internet and mobile devices created opportunities for numerous successful startups.

- **Economic conditions**: The overall economic environment can significantly impact a startup's success. Entering a market during **a booming economy** can lead to higher consumer spending and investor interest, while starting during a recession may present significant challenges. It migh as well be the other way round, depending on the business idea!



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# Time is a Critical Factor:

- **Funding availability**: Timing can influence a startup's ability to secure funding. Investors may be more willing to invest during **certain economic conditions** or when a particular **industry is experiencing growth**.

- **Cultural trends and shifts**: The cultural climate can influence consumer preferences and behavior. A startup that aligns with **current cultural trends** has a better chance of resonating with its target audience.

- **Regulatory environment**: The timing of market entry can be affected by the **regulatory landscape**. Entering a market when favorable regulations are in place can create opportunities, while **changes in regulations can disrupt** existing business models.



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# Time is a Critical Factor:

- **Team and talent availability**: The availability of skilled talent in a specific field or industry can impact a startup's success. Timing the launch to coincide with the availability of the right team members can be crucial.

- **Customer adoption and education**: Timing can affect how quickly potential customers adopt a new product or service. If a startup enters too early, it may need to invest heavily in educating the market about its offering.

- **Business model validation**: Waiting for the right timing can give founders an opportunity to **validate their business model**, gather feedback, and refine their approach before scaling the startup.



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# Success Factors for Startups


- Established in 2008


- Established in 2009

**Why was this timing so good?**



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# Success Factors for Startups



- **Recession**
- People **needed extra money**
- That made them overcome the fact that strangers will sleep/drive in their place/car



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# Success Factors for Startups

Uber

Timing was crucial for the success of the Uber application in 2009 for several reasons:

**1.Technological Advancements: In 2009, smartphones and mobile apps were becoming more prevalent**. The iPhone had been introduced just two years earlier, and Android smartphones were also gaining popularity. These advancements in mobile technology provided the perfect platform for Uber to offer its on-demand ride-hailing service through a user-friendly app.

**2.Market Gap: At that time, traditional taxi services were often unreliable, inefficient, and had limited coverage in many cities**. Uber recognized this gap in the market and used the emerging technology to provide a more convenient and efficient solution for urban transportation.

**3.Early Mover Advantage: Uber was one of the first companies to offer a ride-hailing service through a mobile app**. Being an early mover in the market allowed Uber to establish itself as a dominant player before competitors could catch up. This advantage helped them build a large user base and driver network quickly.

# Success Factors for Startups

Uber

**4. Economic Environment: The timing of Uber's launch in 2009 coincided with the aftermath of the global financial crisis of 2007-2008**. During this period, people were looking for cost-effective alternatives to traditional taxis and private car ownership. Uber's competitive pricing and ease of use appealed to many potential customers during this economic downturn.

**5. Behavioral Shifts: The success of Uber was also driven by changing consumer behavior**. People were becoming more comfortable with using mobile apps to access services, and the idea of sharing rides with strangers became more socially acceptable.

**6. Investor Interest: Uber's launch in 2009 coincided with a time when venture capitalists and investors were actively seeking out promising startups in the tech sector**. Uber's innovative approach and the potential disruption it could bring to the transportation industry attracted significant funding and support.

# Success Factors for Startups

Uber

In summary, Uber's success in 2009 was a result of a perfect storm of technological advancements, market timing, early mover advantage, economic conditions, changing consumer behavior, and investor interest.

By tapping into these factors, Uber was able to revolutionize the transportation industry and become one of the most successful and influential tech companies of its time.



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# Critical Factor - Timing

Options:

- Is it too early (you have to educate too much)?
- Is it early?
- Is it adequate timing?
- Is it too late?



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# Reasons for Market Research

- **Timing is a crucial part of the startup´s success** and it forms an **essential reason for market research**.
  This phase should happen almost immediately after the founder comes up with an idea.
  Moving forward with an **idea that might not have market potential is a waste** of time/money/resources.

- Entrepreneurs tend to **fall in love blindly with their ideas**.
  Often there is a notion that customers will surely embrace it. This might (and very often) is not a case.

- You as entrepreneurs need to make something that the ***market wants and doesn't already have***.
  If you do this, and you launch at the right time, you have an important advantage over your competition (if there is any).



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# Avoid the Product/Service Failure


- Many startups think they operate without competition and that is rarely the case. There is always an **alternative way your customers could be spending their time/money**.

- Projects that skip necessery phase of performing a market research enter in a risk of product/service failure.

- In this page of the Harvard Business Review you can find a video that explains the main reasons for failure of product launches: Harvard Business Review

# Market Research Definition

**Market research** is the **systematic** and **objective** identification, collection, analysis, and dissemination of information for the purpose of **assisting management** in ***decision making*** related to the **identification** and **solution** of **problems** (and opportunities) in marketing.



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# Intuitive Decisions Vs. Market Research

**Intuitive decisions**

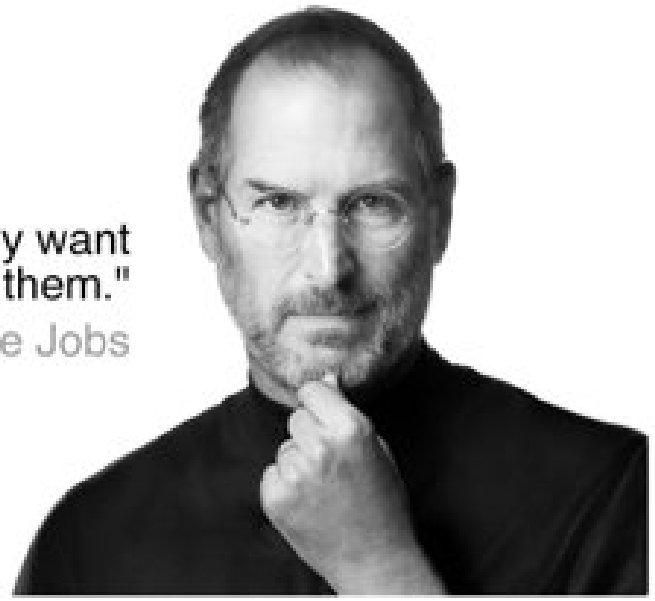
- Gut feeling
- Prior knowledge
- Automatic
- Instinctive

Vs..

**Market Research**

- Provides hard data based on supportable facts

"People don't know what they want until you show it to them."
- Steve Jobs



General recommendation: Combine the two!

# Market Research Institutions

**ESOMAR (originally the European Society for Opinion and Market Research)** https://www.esomar.org/

**American Marketing Association (AMA) -** https://www.ama.org/

# Market Research Challenges Nowadays

- **Saturation** with surveys - commonly used in day-to-day lives
- It is getting more **difficult to persuade people** to take part in research
- **Governments are interested** in the ways companies collect and use data
- **New forms of data protection legislation** place tighter legal restrictions on research



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# Market Research Challenges Nowadays

Addressing these challenges requires a combination of innovative methodologies, ethical practices, and a deep understanding of consumer behavior and technology trends.

As technology and consumer behaviors continue to evolve, market researchers must remain adaptable and resourceful to overcome these obstacles and provide valuable insights to businesses and organizations.



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# Questions for your Strategy

- What is the market?
- How do we segment the market?
- What are the wants and needs of each market segment?
- What is the size of each market segment?
- Who are our competitors?
- How do our competitors fulfil the needs and wants of consumers?
- Which segments should we target?
- Which model of a product/service should we use for that segment?
- Which is the optimal price for that product/service?
- Which promotional method should we use to be the most efficient?
- How shall we distribute the product?

Timely, accurate, objective




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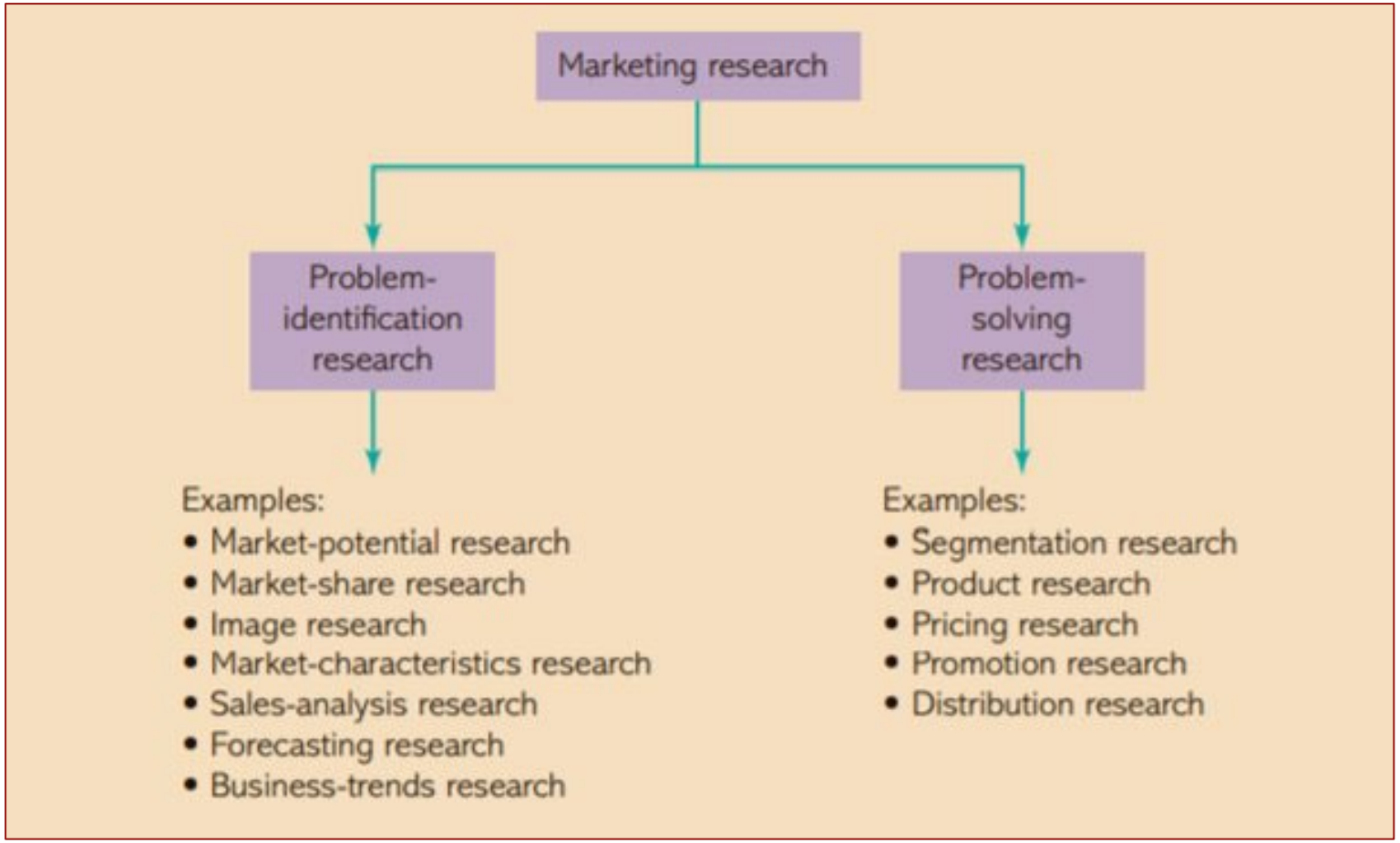
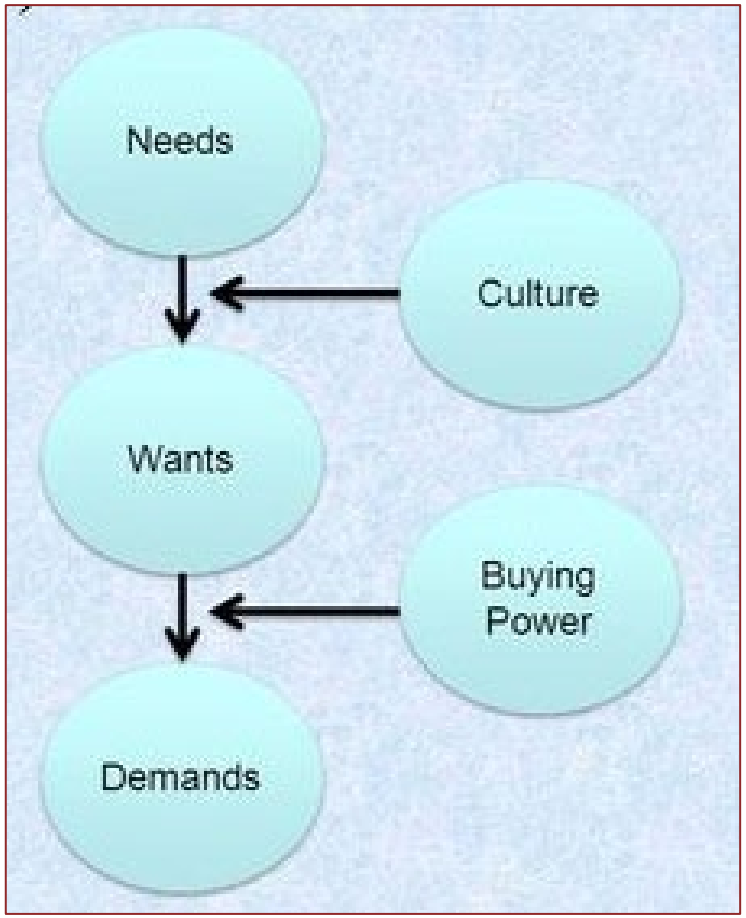
# Classification of Market Research



# Customer is in the core




Be aware of the cultural differences between

- your country of origin!
- your own culture/values!
- local culture where your customers are!

**Do no assume, but measure!**



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# Market Research Types

Data needed for marketing management decisions
can be grouped into two types: **primary** and **secondary data**

- **Primary data** refers to information that is developed and **gathered by the researcher** for the **research project at hand**.

- **Secondary data** have been previously gathered by **someone other** than the researcher and/or for some **other purpose** than the research project at hand.



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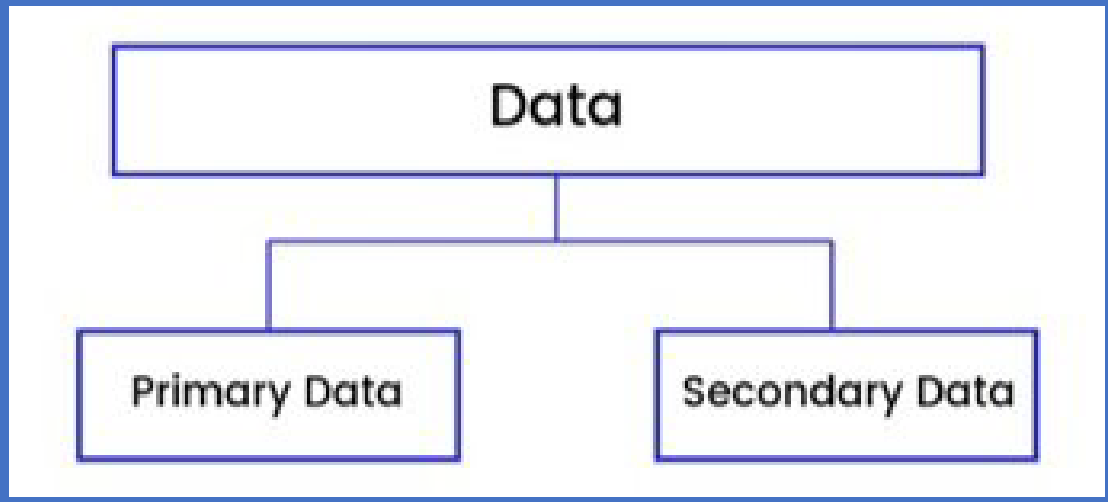
# Market Research Types

Which one is cheaper?

Which one is faster?



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# Advantages of Secondary Data

5 **advantages** of secondary data:

1. It can be obtained **quickly**
2. Compared to obtaining primary data, secondary data is **inexpensive**
3. For almost any aplication, secondary data are **readily available**
4. Secondary data may **enhance primary data** by providing **current look** at issues
5. Secondary data may be **enough for reaching research objective**



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# Disadvantages of Secondary Data

5 **disadvantages** of secondary data:

1. **Incompatible report units**

Country, region, city, ZIP code

2. **Mismatch in the units of measurement**

Businesses by sales income Vs. square meters Vs. No of employees

3. **Differing definitions used to classify data**

Household income in 3 classes 20K-35K, 35K-50K, 50K+, Vs. 80K

4. **Timeliness of the secondary data**

Data outdated or no longer available

5. **Credibility of the report**

Purpose of the study? Who collected information? How and what information?

Consistency with other information?



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# Competitor Research

It's critical to learn the competitor landscape and main industry players, their pricing and marketing tactics.
We can learn about them from their users.

You can gather and analyse all the information available online: websites, blogs, press releases, social media accounts, press interviews, marketing campaigns and website traffic.

You can test competitors' products to understand their strengths and weaknesses.

Reading industry reports is also part of market research. It reveals the market size, the overall number of users and amount of money they spend on competitors' products.

This research helps you to define your **unique selling point**, and how you could differentiate from competitors.



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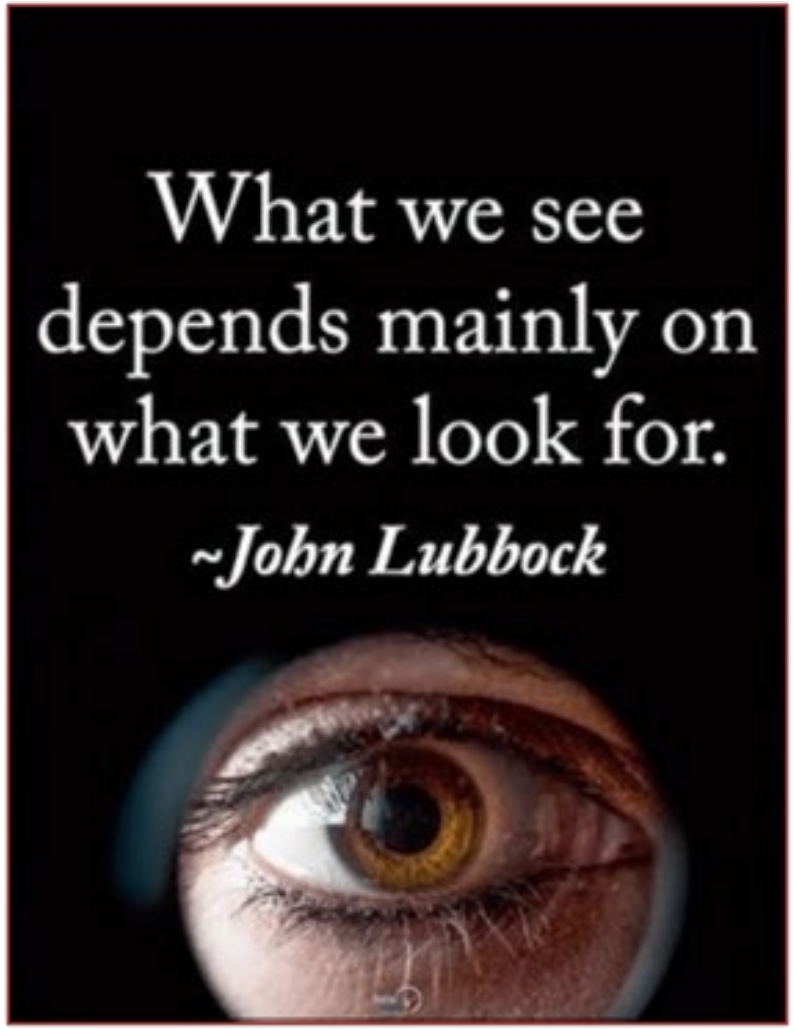
# Secondary research

Where do you find them for your startup?



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# Question

How Many Of You Have Looked Into Other Similar Companies?



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# How to Compare Data Collected?

Try to search for the closest match to the business for comparative analysis and consider these points:

- Companies of **relative size and budget**
- Companies **serving the same geographic area** as the proposed startup, which could be global if it's a web-based business
- Compare with the companies with a **similar ownership structure**. If your business will have two partners, look for businesses run and managed by a couple of partners rather than an advisory board.
- **Companies which are relatively new** and have started functioning recently because long-standing businesses are successful because of their 20-year business history and reputation.



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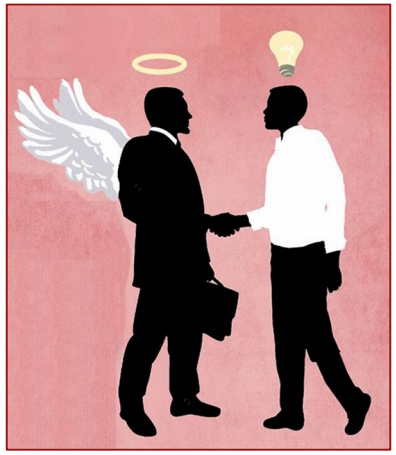
# Understand, Convince and Impress



➢ By performing market research you as entrepreneurs will:

1. **Gain a better understanding** of the industry and environment you're entering.
2. **Convince** and **impress** investors.

➢ With quality **market research you will transmit two important things to investors**:

1. You are **committed to the success** of the startup.
   You have to state clearly who your competitors are and why you're different from the market.
   Consequently you gain respect from anyone who is looking to invest in your project.

2. You will make **investor´s job easier**.
   Investors work with investment funds and are required to conduct detailed due diligence process.
   They must be sure that all that you state in your business plan is feasible.



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# What Drives Investors?

Start-ups seeking new investors, regardless of the level of investment, need to better understand what drives individual investors or venture capital firms.

Around **75% of venture capital backed businesses fail to get a positive return on capital (ROIC)** for investors. Because of this **risk**, investors have to be **selective**.

They are selective and in every phase they are looking for different aspects.

There are various rounds of funding in the startup funding process.
Do you know how they are called?



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# What Drives Investors?

| Statistic | Data |
|---|---|
| Startups failing overall | ~90% |
| Startups failing in first year | 10% |
| Startups failing in years 2-5 | 70% |
| Venture-backed startups failing (estimate) | 75% |



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# Rounds of Startup Funding

There are various rounds of funding in the startup funding process.  Startups typically go through **several rounds of financing** as they progress from the initial idea stage to becoming a fully matured and established company. Each financing round represents a phase of growth and development and involves raising capital from external investors. Here are the common rounds of financing that startups go through.

- **Pre-seed** (family & friends) Pre-seed funding is the **earliest stage of financing for a startup**. It is the very first money a company gets, usually from people they know personally.  Pre-seed funding is used over a shorter period to create the foundational aspects of the business, like the initial MVP and founding team. It is designed to help the founders form a company, get operations going, and achieve the milestones they need to hit to raise a seed round Pre-seed rounds often are followed by other rounds.

# Rounds of Startup Funding

- **Seed funding** (angel investors, early venture capitalists, F&F) The funds raised in this round are used to validate the startup's idea, develop a prototype, conduct market research, and hire key team members.

- **Series A** - At this point, the startup should have a proven business model, some customer traction, and a well-defined growth strategy. Series A funding is usually provided by venture capital firms

- **Series B** - The Series B round comes after the company has achieved a certain level of growth and is looking to further expand and capture a larger market share.

- **Series C, D, E and further** - looking to dominate their market or expand globally

- Additional efforts to earn capital (if appropriate)



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# What Drives Investors?

## TYPES OF FUNDING ROUNDS FOR YOUR STARTUP

| Funding Round | Pre-Seed | Series A | Series B | Series C |
|---|---|---|---|---|
| Stage Focus | Proof of Concept/ Prototype | Revenue Growth | Growth | Large Scale Expansions |
| Common Elements of Growth | Hiring | Development, Operations, Branding & Marketing | Hiring, Market Expansion, Buying Businesses | Acquiring businesses, International Markets |
| Amount of Investment | $10k - $1MM | $10MM | $15 - $25MM | ~$50MM |



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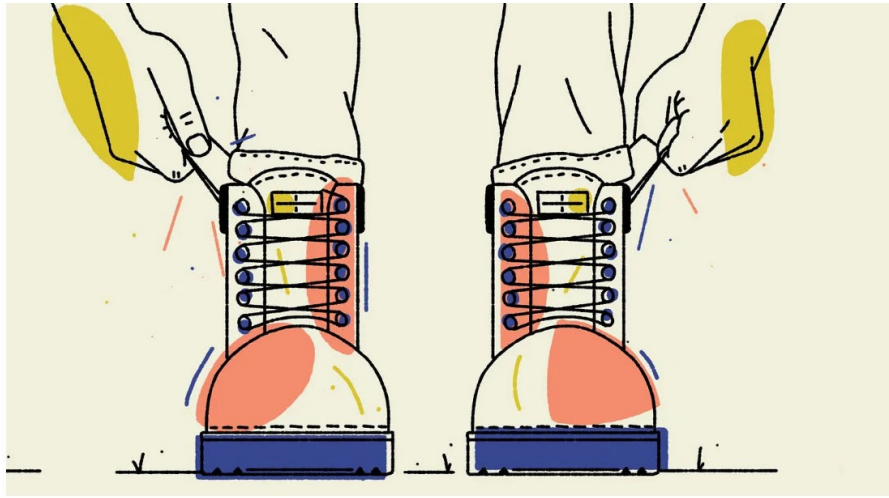
# Bootstrapping

Do you know how what is **bootstrapping**?



Bootstrapping is when an entrepreneurs start companies with little capital, **relying on money other than outside investments**.

For example, they are bootstrapping when they attempt to found and build a company from **personal finances or the operating revenues of the new company**.

Example: GoPro cameras was a bootstrapped company that eventually went public with a $3 billion valuation.



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# Bootstrapping

## BOOTSTRAPPING

### PERSONAL SAVINGS

Tap into personal savings, borrow from your 401(K), or keep your day job and use part of your paycheck to bankroll your startup until you can secure outside funding.

**• WARNING •**

Don't take it all. Keep an emergency fund in case a client doesn't pay on time, a pipe bursts and destroys equipment, etc.

### CREDIT CARDS

Use **credit cards** to buy initial equipment and cover setup costs.

You can buy some time & avoid interest charges by transferring the balance to other cards while you either wait for your first customers to pay, or secure additional funding.

**• WARNING •**

If you fail to get funding and can't pay off the debt in full, you're personally responsible for the balance — and the interest payments.



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# What Drives Investors?

Most investors get involved with only a small fraction of ideas they screen, so it's essential **to stand out**.

Most investors look for **very specific** things when considering an investment in a startup business.

Investors will rarely invest in an existing and successful "me too" product where there will likely be a fight for market share.

**Having ideas which are just a "good idea" is not sufficient.**

Investors are looking for **meaningful, unique and innovative products/services**.



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# Meaningful, Unique & Innovative Product or Service

Either way, the product or service should have **strong differentiators**. Investors look for a product or service with a **compelling reason for customers to change current habits**, or see something that is truly unique. Meaningful **patents or trade secrets** are highly desirable.

The **functionality** provided by a unique and innovative product should be readily apparent, making the **sale process easier**. **Minimal barriers** should stand in the way of the buying process, making it easy for customers to **convert**.

A **differentiated business model** is a major plus.

Example: Leveraging the internet has provided a way to reach consumers not easily accessible before – some notable examples are Direct shipping of FMCG, online mortgages (Quicken Loans), easy reach transportation (Uber, Lyft).



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# Searching for Patents

In Europe, you can search for patents through the **European Patent Office (EPO)** and various national patent offices. Here are the main sources where you can conduct patent searches in Europe:

**European Patent Office (EPO) - Espacenet**: The EPO's patent database, called Espacenet, is one of the most comprehensive sources for searching European patents.

It provides access to over 100 million patent documents from around the world, including European Patent Office (EP) documents and international patents filed under the Patent Cooperation Treaty (PCT).

Website: https://worldwide.espacenet.com/

# Searching for Patents

National Patent Offices: Each European country has its own national patent office where you can search for patents filed in that specific country. These national patent offices typically provide databases of patents granted within their jurisdiction.

Some of the major national patent offices in Europe include:

- Spain: Spanish Patent and Trademark Office (OEPM) - https://www.oepm.es/en/
- Germany: German Patent and Trade Mark Office (DPMA) - https://www.dpma.de/english/index.html
- France: National Institute of Industrial Property (INPI) - https://www.inpi.fr/en/home
- United Kingdom: Intellectual Property Office (IPO) - https://www.gov.uk/government/organisations/intellectual-property-office

# Searching for Patents

Google Patents: Google Patents is a free and user-friendly search engine that allows you to search for patents from around the world, including European patents. While it may not have the full features of specialized patent databases, it's a great starting point for preliminary searches.

Website: https://patents.google.com/

The Lens: The Lens is another free and open patent search engine that covers global patent data, including European patents. It offers various search options and analysis tools.

Website: https://www.lens.org/



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# Market Research Suppliers

There are two types of market research suppliers by their relationship to the client: **internal** and **external**.

**Internal supplier** - a marketing research department located **within the company** where all the market research staff members are employees of the company. Most major corporations have their own market research departments. (**Client-side research, DIY**)

**External supplier** - research suppliers that are **not a part of the company**. The external supplier may offer the entire range of market services including problem definition, developing an approach, questionnaire design, sampling, data collection, data analysis, interpretation, and report preparation and presentation. (**Agencies**)



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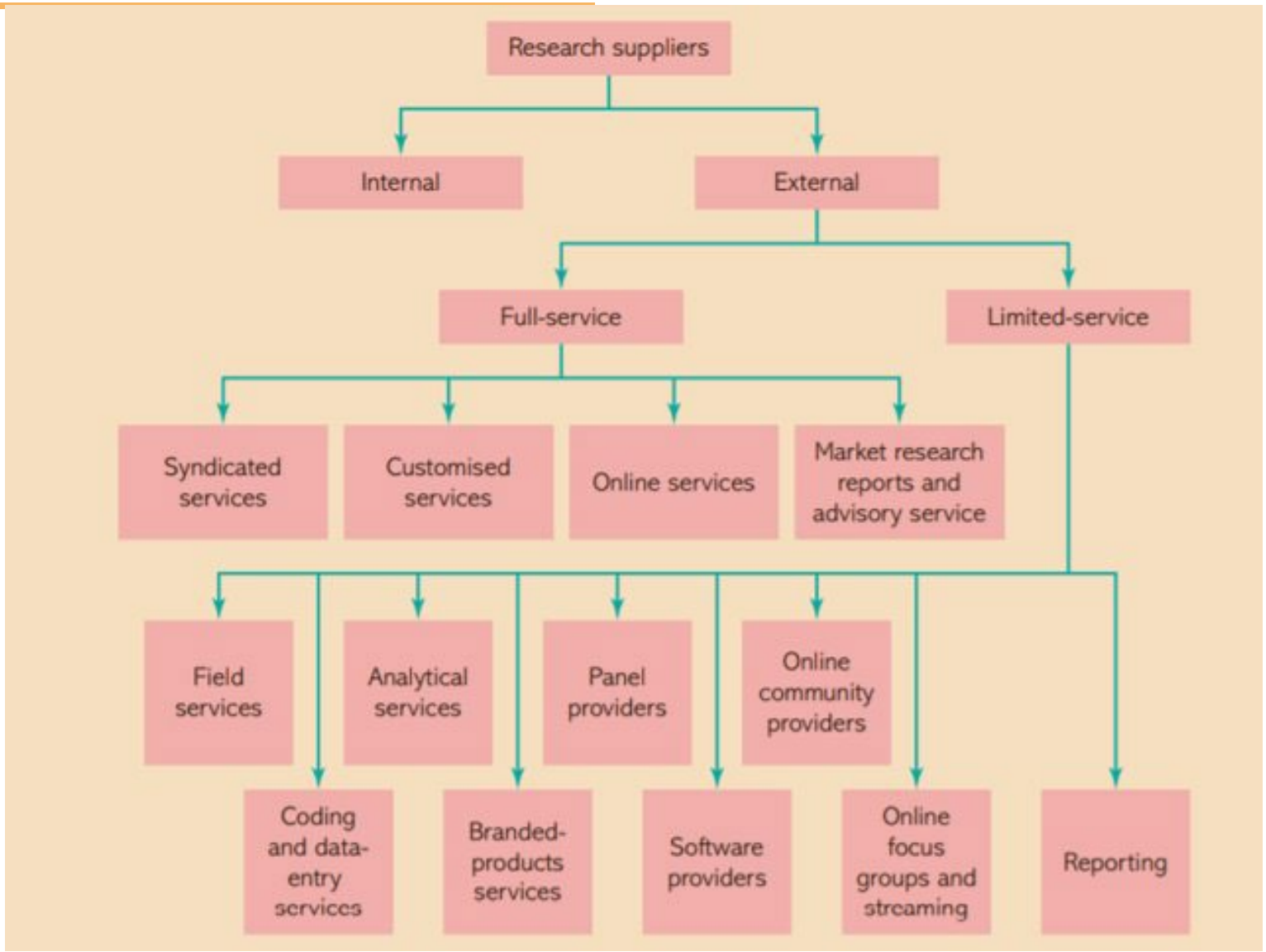
# Market Research Suppliers



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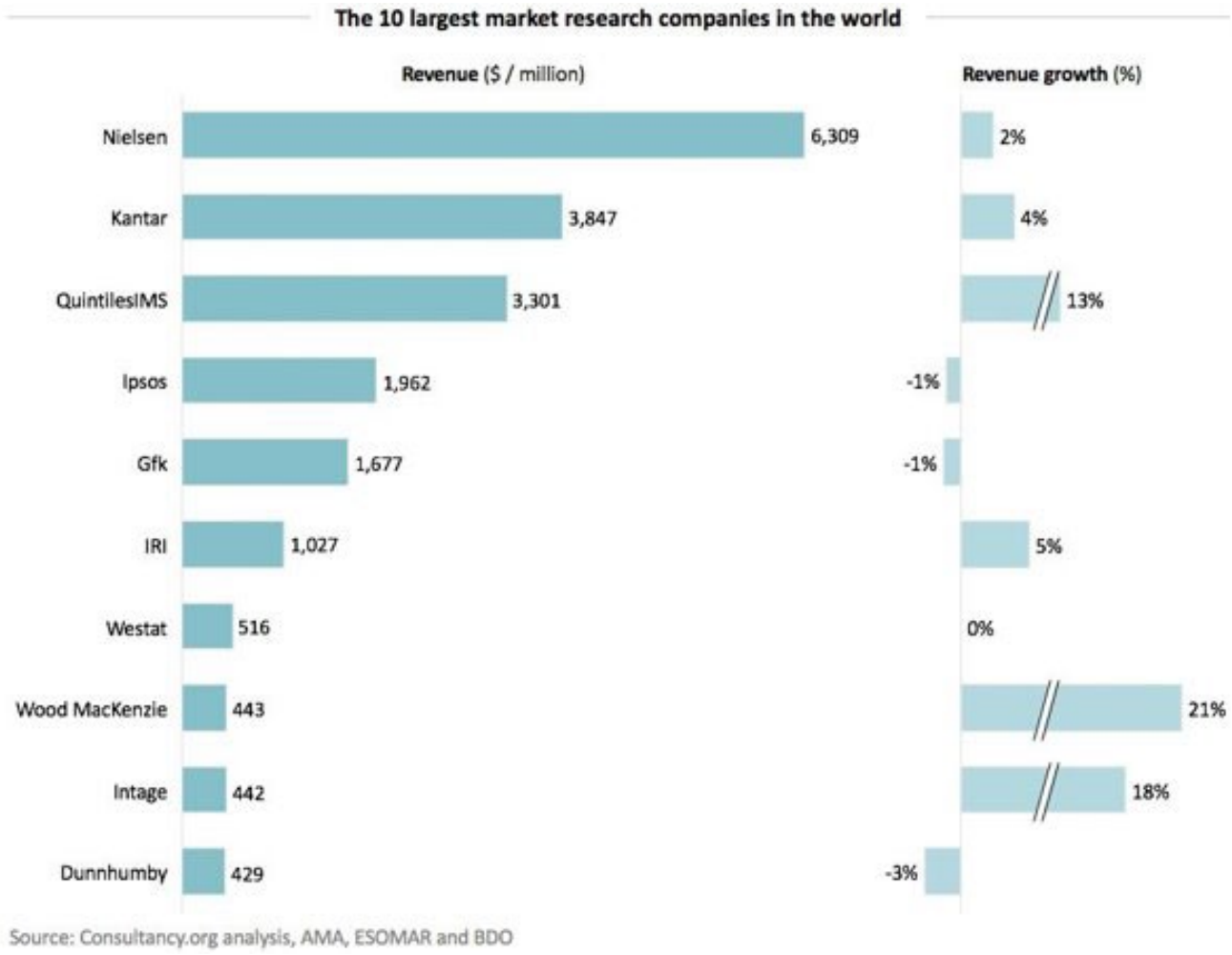
# Top Market Research Companies



# Top Market Research Companies

The leading global market research firms in 2025 are:

- NielsenIQ: Renowned for retail and consumer panel data, especially in CPG and retail, with operations in over 90 markets.
- Kantar Group: Global presence in over 90 markets, specializing in brand research, media analysis, and consumer insights.
- Ipsos: A leader in polling, surveys, and social research, providing services in over 90 countries.
- GfK (Growth from Knowledge): Specializes in consumer and retail analytics—particularly technology, fashion, and automotive sectors.
- IRI (Information Resources, Inc.): Focused on CPG and retail analytics, offering predictive modeling for demand forecasting and supply chain optimization.

- Westat: Known for in-depth government, health, education, and social program research.
- Forrester: Specializes in business, technology, and B2B market research, offering advisory services and industry reports.
- Veridata Insights: Emerging as a modern, agile leader in consumer insights and trend tracking.
- quantilope: Recognized for automation, innovative methodologies, and agile consumer intelligence platforms.
- Next Move Strategy Consulting: Focuses on strategic market intelligence and customized reports for global clients, including Fortune 500 companies.



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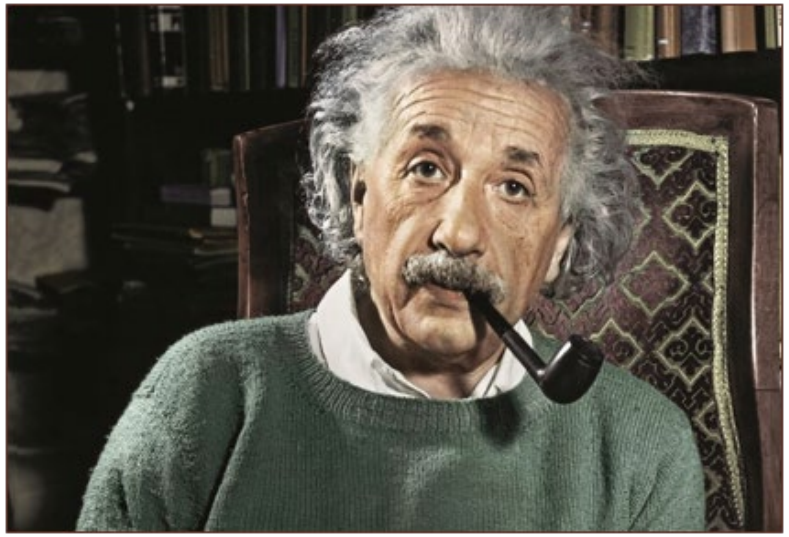
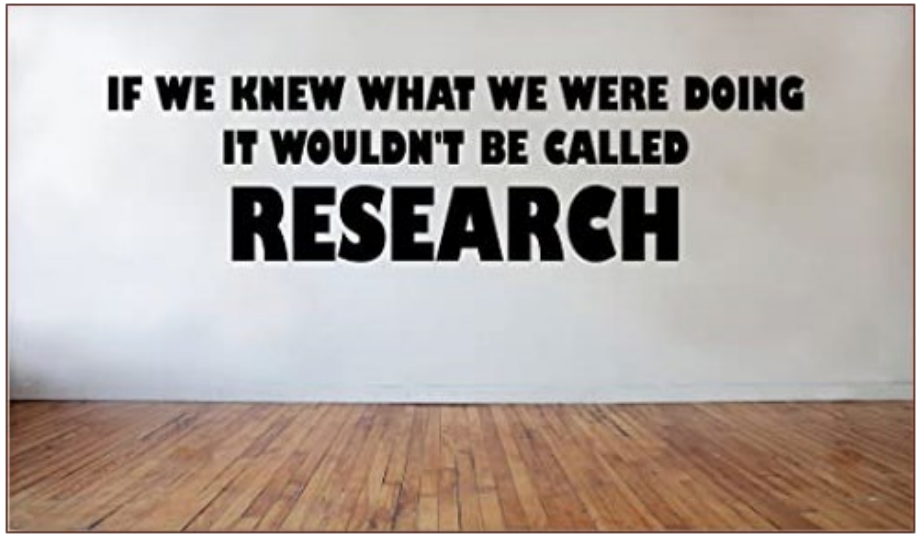
# Market Research – Steps to Follow






**Albert Einstein** (1879 – 1955) was a German-born theoretical physicist who developed the theory of relativity, one of the two pillars of modern physics (alongside quantum mechanics). His work is also known for its influence on the philosophy of science.



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# Market Research Process

How many steps does Market Research Process have?

3 4 5 6 7 9 11 13?



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# The 11-Step Market Research Process

## STEPS IN THE MARKETING RESEARCH PROCESS

1. Establish the need for the marketing research
2. Define the problem
3. Establish research objectives
4. Determine the research design
5. Identify information types and sources
6. Determine the methods of accessing data
7. Design data collection forms
8. Determine sample plan and size
9. Collect data
10. Data processing and analysis
11. Formulating conclusion, preparing and presenting the report



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# 1. Market Research Not Needed?

How can you know if the market research is not needed?

- The information is **already available** (MIS, routine decisions).
- The **timing is wrong** to conduct market research (timing is critical).

  E.g. competition has to act quickly to market changes.
- **Funds are not available** for **market research.**

  Often small firms or firms having cash-flow problems may not be able to afford it, but it should be budgeted.
- **Funds are not available** to **implement the findings.**
- **Costs outweigh the value** of market research – which value is the research likely to add?

  Increase in consumer satisfaction should be linked to higher sales or bigger market share.

The metrics to demonstrate the risk was mitigated and quantify financial value of the difference!



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# 2: Define the Problem

When you as entrepreneurs decide to perform a research the next step is to **define the problem**.

This is **the most important step**!

When a problem is **wrongly defined**, all the rest is **wasted effort**!

- Market research should be **only be performed** when your marketings needs to **make decisions**.
- It should be performed when there is **not enough informaton** for making these decisions (MIS).
- ***"Make decisions"*** refers that your company should identify the **decision alternatives**.
- After conducted research your marketing team should choose **one of the alternatives**.
- If there are **no alternatives**, **no decision is necessery**.



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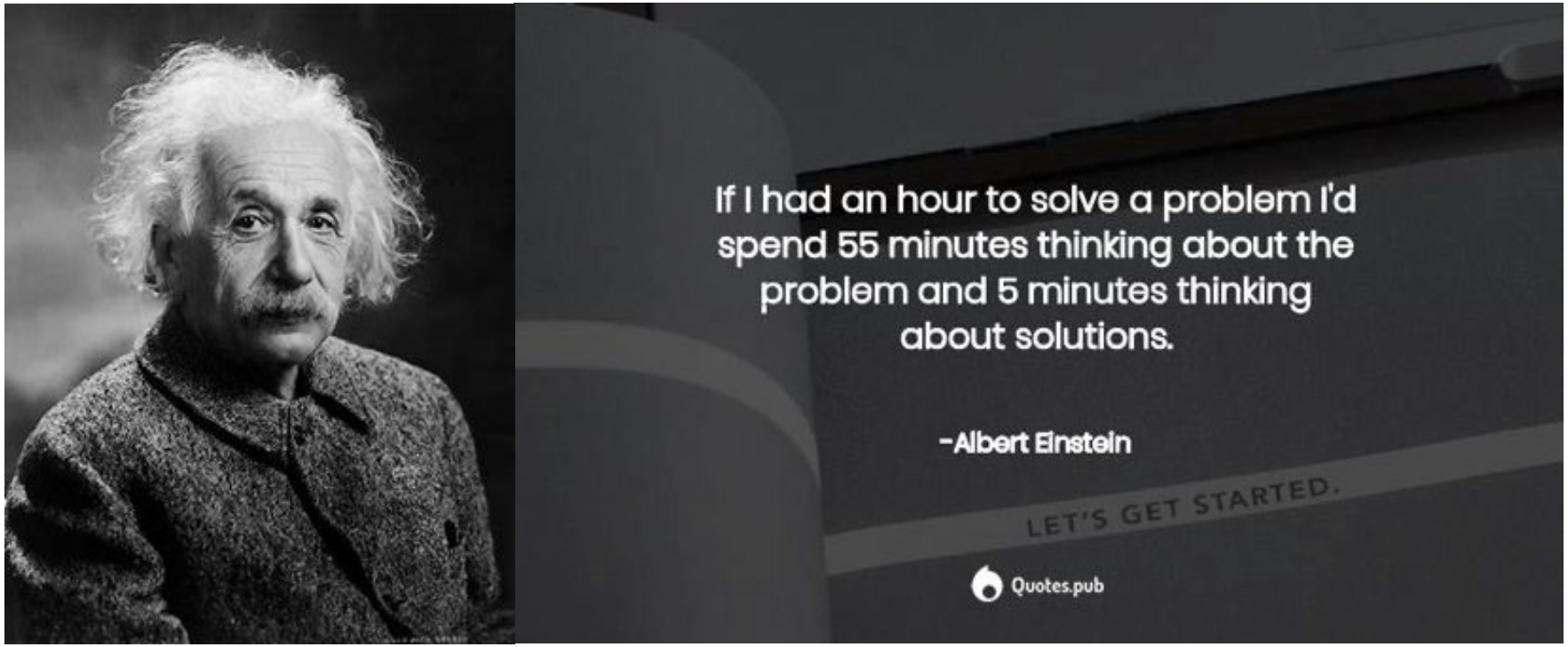
# 2: Define the Problem



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# 2: Define the Problem

- **Marketing decision problem** is the problem confronting you as the marketing decision maker, which asks **what you as the decision maker need to do**. The marketing decision problem is action oriented.

- **Market research problem** is a problem that entails determining **what information is needed** and how it can be obtained in the most feasible way (effectively and efficiently). The market resarch problem is information oriented.

**A problem well defined is a problem half solved!**



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# 2: Research Brief and Proposal

**The importance of clearly identifying and defining the research problem cannot be overstated**.

The basis of defining is the **communication between you as marketing decision makers and researchers**.

You, marketing decision makers must **communicate the problems** you face & **research support you need.**

This communication you should prepare comes in the form of a **research brief**.

The researcher responds to the research brief with a **research proposal**, which encapsulates the researcher's vision of a practical solution to the set research problem.

The truly serious mistakes are made not as
a result of wrong answers but because
of asking the wrong questions.



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# 2: Research Brief Questions

**The brief is the statement where you will set out the background to the research and what objectives it is hoped will be met.** It does not matter if the research project is a **DIY job** or project that is to be **outsourced**, it is good practice to prepare a **market research brief**.

1. Why do this market research? What action will be taken when the research is completed?
2. What has caused this problem or led to this opportunity? (history, product description)
3. What is known about the area of research already? (previous desk research, reports)
4. Target groups for the research? (buyers or specifiers, user? multiple purchasers or not?)
5. What specific information is needed from the research? (e.g. market size, trends, buying behavior, customer needs, segmentation)
6. What is the proposed budget?
7. Are there any initial ideas for the research method? (preference phone interview, face-to-face, online survey, etc.?)
8. Are there any reporting requirements? (narrative report is an extra)
9. When are the findings required?

Start thinking about stating your own market research brief, as this will be your first delivery.



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# 3. Establish Research Objectives

**Research objectives** are *totally dependent on the problem* & **state what researcher must do.**

Research objectives are specific and tell the researcher **exactly what he or she must** do **to obtain the information** necessery to allow you as managers to choose between the decision alternatives.

Research objective must define:

1. From **whom** information must be gathered
2. **What** information is needed
3. Specify the **unit of measurement!**
4. **Word questions** used to gather the information




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# 3. Research Objectives Examples

- Conduct a test of 400 persons who have purchased ecological food online during the last month.
- Conduct a test of the new  delivery prices A, B, and C, and the following willingness to buy online:
  **"The next time you buy ecological food online, how likely are you to buy if the delivery costs A, B, C?"**
- Responses are very likely to be measured on a scale from 1 to 7,  **1=Very Unlikely** to **7=Very Likely**.
- **Whom from** – 400 persons who bought ecological food online in the last month
- **What information** – likelihood to purchase
- **Unit of measurement** – 7 point scale of likelihood


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# 3. Hypothesis

- Sometimes hypotheses are stated that guide the development of the research objective.

- **Hypotheses** are statements that are **taken for true** for the purposes of argument or investigation.
  The researcher´s task is to determine if there is **support** for that statemement.

- You as managers will make decisions every day based on **statements** you **believe to be true**.
  You make **hypotheses to state consequences** of the **decision alternatives**.
  You need to have **confidence** that your most important decisions are based on **valid hypothesis**.



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# 3. Research Objectives

- The choice of the marketing research design depend on the research objectives!
- The three common objectives are:
  1. to gain background information and develop hypotheses
  2. to measure the state of a variable of interest (e.g. brand loyalty)
  3. to test hypotheses and relationships between variables (e.g. advertising and sales)



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# 4. Determine Research Design

| Exploratory | Descriptive | Causal |
|---|---|---|

- Exploratory research is an **important part of any marketing or business strategy**.
- Its focus is on the **discovery of ideas** and insights as opposed to collecting statistically accurate data.
- That is why exploratory research is best suited as **the beginning of a research plan**.
- It is **commonly used** for further **defining company issues**, areas for **potential growth**.
- **Exploratory research** is usually conducted when the researcher **does not know much** about the problem and **needs additional information** or desires new or **more recent information**.



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# 4. Determine Research Design

| Exploratory | Descriptive | Causal |
|---|---|---|
| • Goal: gather preliminary information, define problem, suggest hypotheses<br>• Usually based on qualitative approach<br>• Example: what kind of services could we provide around our product? | • Goal: describing in detail problems, situations, markets, and customers<br>• Both qualitative and quantitative approaches can be used<br>• Example: what age group buys our products? | • Goal: test hypotheses about cause-and-effect relationships<br>• Usually based quantitative survey or experimentation data<br>• Example: how do customers react to change in price? |

Flexible design
Broad scope
Fuzzy results

Rigid design
Narrow scope
Clear results



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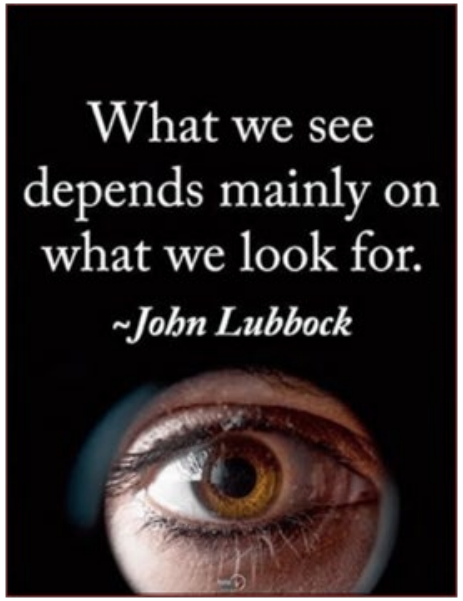
# 5. Information Types and Sources

Data can be grouped into two types: **primary** and **secondary data**

- **Primary data** refers to information that is developed and **gathered by the researcher** for the **research project at hand**.
- **Secondary data** have been previously gathered by **someone other** than the researcher and/or for some **other purpose** than the research project at hand.




<u>5 **advantages** of secondary data:</u>

1. It can be obtained **quickly**
2. Compared to obtaining primary data, secondary data is **inexpensive**
3. For almost any aplication, secondary data are **readily available**
4. Secondary data may **enhance primary data** by providing **current look** at issues
5. Secondary data may be **enough for reaching research objective**



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# 5. Information Types and Sources

5 **disadvantages** of secondary data:

1. **Incompatible report units –** not the same country, region, city, ZIP code
2. **Mismatch in the units of measurement –** B2B data on sales Vs. square meters Vs. number of of employees
3. **Differing definitions used to classify data -** Household income in classes 20-35K, 35-50K, 50K+, Vs. needed 80K+
4. **Timeliness of the secondary data -** Data outdated or no longer available
5. **Credibility of the report -** Purpose of the study? Who collected information? How and what information?



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# 6. Determine Methods of Accessing Data

When a researcher **does not communicate with respondents**:

- Observation
- Screening information online

When a researcher **communicates with respondents**:

1. **Person ask questions** – in home survey, telephone survey, focus group, interview, etc.
2. **Computer-assisted telephone interview (CATI)**,
   **Computer-assisted personal interview (CAPI)**
   **Computer-assisted Web interviewing (CAWI)** Online survey to email address
3. **Respondents answer questions without computer asssistance** (mail surveys)
4. Combination of other methods – **hybrid** methods

Hint: If you can obtain data by observation it is always better than asking questions!



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# 7. Design Data Collection Forms

**Design a form** in which **researcher gathers data.** When a researcher communicates with respondents (asks questions) the form is called **questionnaire** or a **survey** (paper-and-pen survey, online survey, mobile survey, etc.). When researcher only observes respondents, the form is called **observation form**.


Observer: _____ Location (and noise level, 1-5): _____

Date: _____ Time: _____

M F (circle one)

| | |
|---|---|
| Study on computer | Study without computer |
| Social media | Phone |
| Games/Movies | Email |
| Talking | Other |

Context: Alone With Friends Can't tell

Devices: Mac Windows Tablet

Other: Eating Drinking Listening to Music



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# 8. Determine Sample and Size

- **Market research** are undertaken to **learn about populations by taking a sample** of that population.
- A **population** consists of the **entire group** about which the researcher wishes to make inferences.

- A **sample** is a **subset** of the **population**.
- **Sample plan** describes **how each sample element**, or **sample unit**, is to be drawn from the total population.
- The **type of sample plan** determines whether the sample is **representative** of the population.
- **Sample size** is **how many elements** of the population should be used.
- It determines the **accuracy** of the sample results to reflect population.



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# 9-11. Collect, Analyze Data & Report

- Companies specialized in this step are called **field service companies**.
- People who collect data are called **field workers**.
- **Validations** (industry standard) 10% or respondents are **recontacted**.
- The objective of data analysis is to use **statistical tools** to present data in a **form** that **satisfies the research objectives**. (E.g. Excel or IBM SPSS analysis software)
- **Report is often the only record** you as clients will have of the market research project.
- It is mostly done as a written report followed by an oral presentation upon request.
- It must **clearly** report findings to the research client in an **actionable format**.



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# Ethics

There are **four main actors** in the marketing research:
1. **Researcher** 2. **Client** 3. **Participants** 4. **Society**

All of them have certain **responsibilities** among each other and within the research process. The ethical problems arise when **the interests** of the participants **enter in a conflict** situation and some of the participants **do not comply** with the ethical responsibilities.

Marketing researchers have a **duty to participants and society** to behave **ethically**.
Applying ethical principles to marketing research is ***essential***
to producing high-quality research findings.


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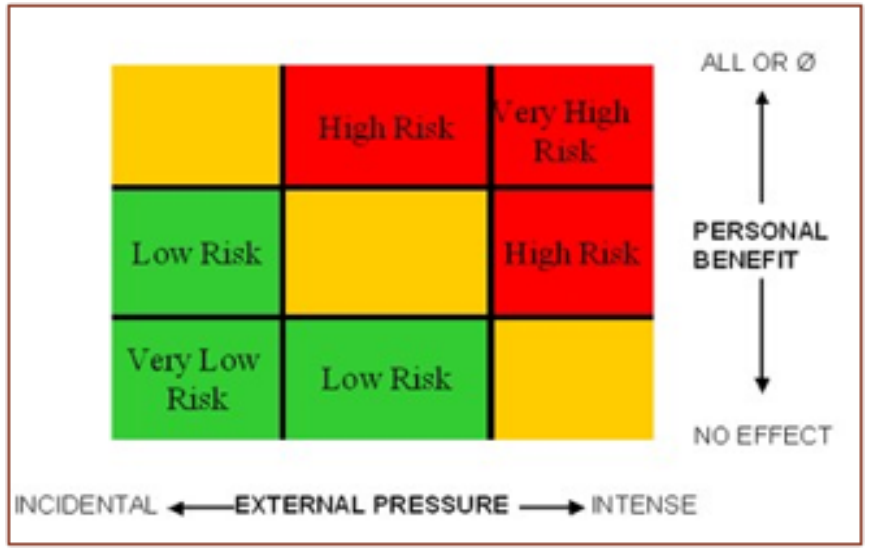
# Ethics




• Examples - when a researcher does not follow the adequate procedures for market research, or the client alters the results in publicity campaigns.

• That is the reason for the **codes of ethics** assembled by *various organizations* that serve to orient, give guidance and solve ethical dilemmas in the process of marketing research.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# Ethics




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# Decision Making

- Startups and Investors have to **make decisions**
- Decisions are made among **decision options**
- **Decisions determine success** of a business/investment
- Entrepreneurs/Investors face **anxiety**
- Having the **right information reduces anxiety**
- Market research **supports** decision making



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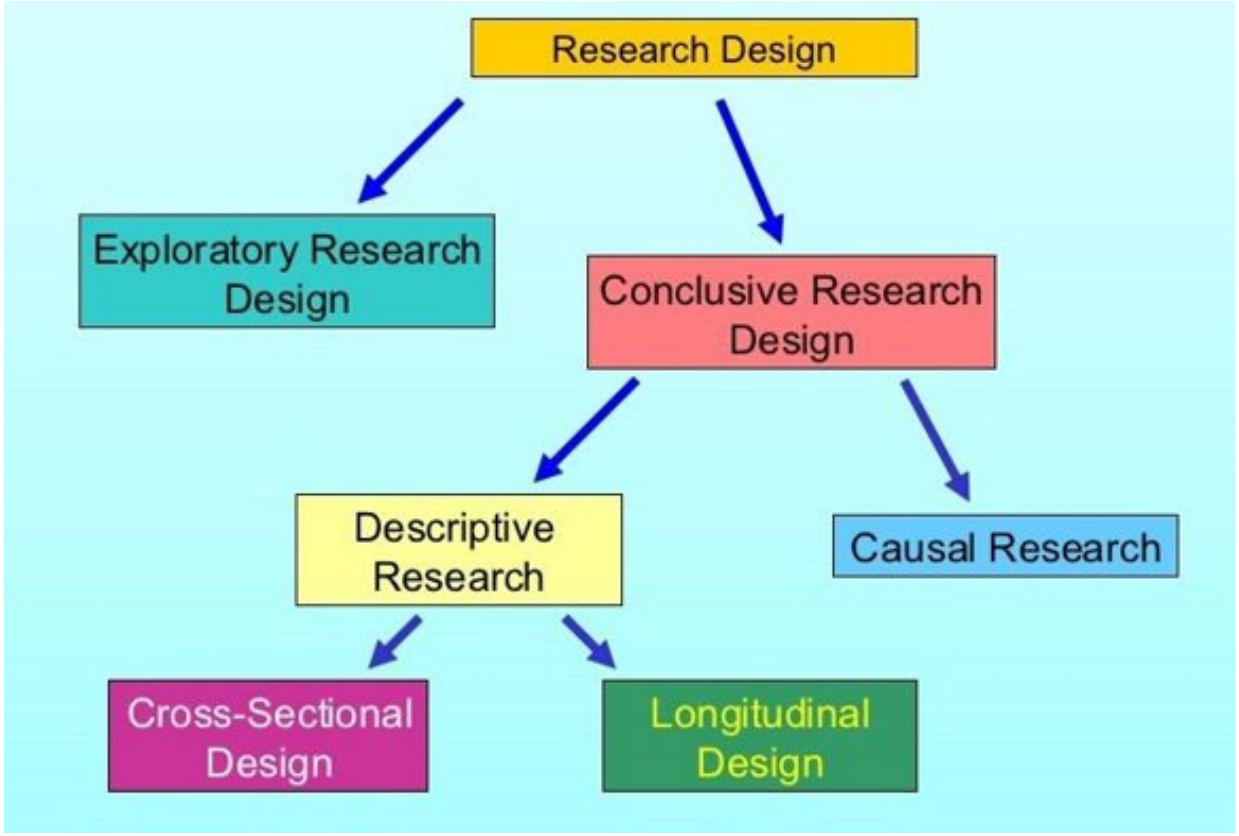
# Classification of Research Design



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# Exploratory Research

What can you use it for?

- Gain background information
- Define terms
- Clarify problems and hypothesis
- Establish research priorities

**Situation Analysis** is a form of exploratory research you can undertake to **gather background information** and gather data pertinent to the **problem area** that may be helpful in properly **defining the problem** decision.

**It is normally a qualitative research** based on primary or secondary data:

- **Secondary Data Analysis** (data collected for some other purpose)
- **Experience Surveys** (Key Informant Technique, Lead-User Survey)
- **Case Analysis** (Similarities with a former or another situation)
- **Focus Groups** (Small group guided by a moderator)
- **In-Depth-Interviews** (IDIs)

# Exploratory Research

- **Experience surveys** refer to gathering information from those thought to be knowledgeable on the issues relevant to the research problem.
- They are also called **Key-Informant** or **Lead-User Surveys**.

- Experience surveys are **different from** the surveys conducted as part of **descriptive research** as there is usually no formal attempt to ensure survey results are representative of any defined group of subjects.
- It is a **qualitative research**.




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# Qualitative research

**Qualitative research** is collecting, analyzing, and interpreting data by observing what **people do and say**.

It is sometimes called **"Soft research"**.

**Pluralistic research** is defined as **the combination of qualitative and quantitative** research methods to gain the **advantages** of both.

**Qualitatives research methods you can choose to perform are:**

Observation, Focus Groups, In-depth Interview (IDI), Protocol Analysis, Projective Techniques, Ethnographic Research, Psychological Measurement, among others.

If you opt for an observation you must make sure the observed behaviour is observable or results of the behaviour are observable, the action must be repetitive of frequent and it must be of a short duration.

If you are in the initial phase of a product development, chances are you will be using focus groups or  In-Depth Interviews.



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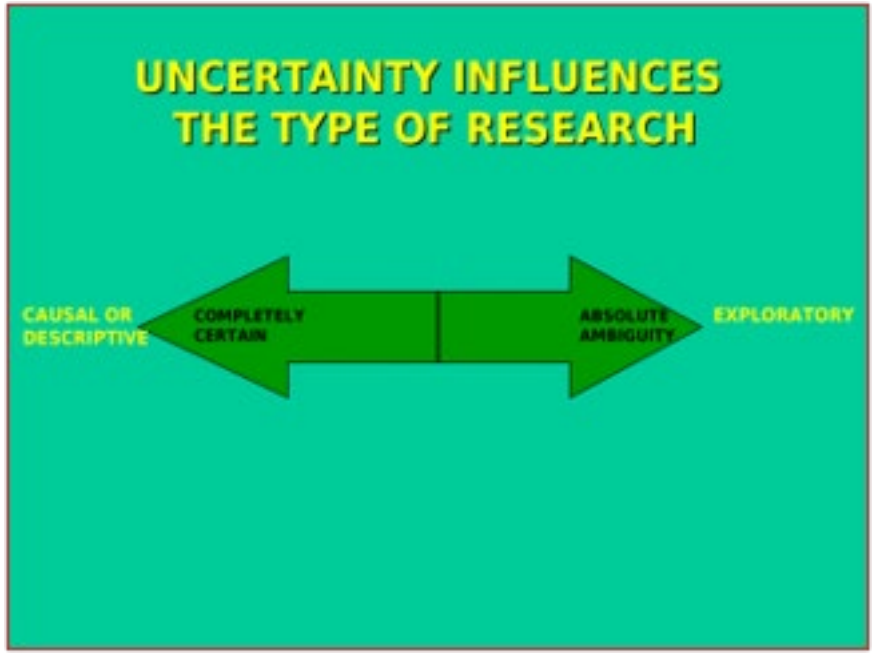
# Exploratory Research Pros and Cons

**Pros**: Exploratory research generates many new ideas.
You can learn "the language" of your customers

**Cons**: It takes a lot of time.
Does not generalize findings. (descriptive research)
Does nor find causal relations between cause and effect. (causal research)



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# Focus Groups

**Focus Groups** are small groups brought together and guided by a **moderator** through an **unstructured**, **spontaneous discussion** for the purpose of **gaining information** relevant to the **reseach problem**.

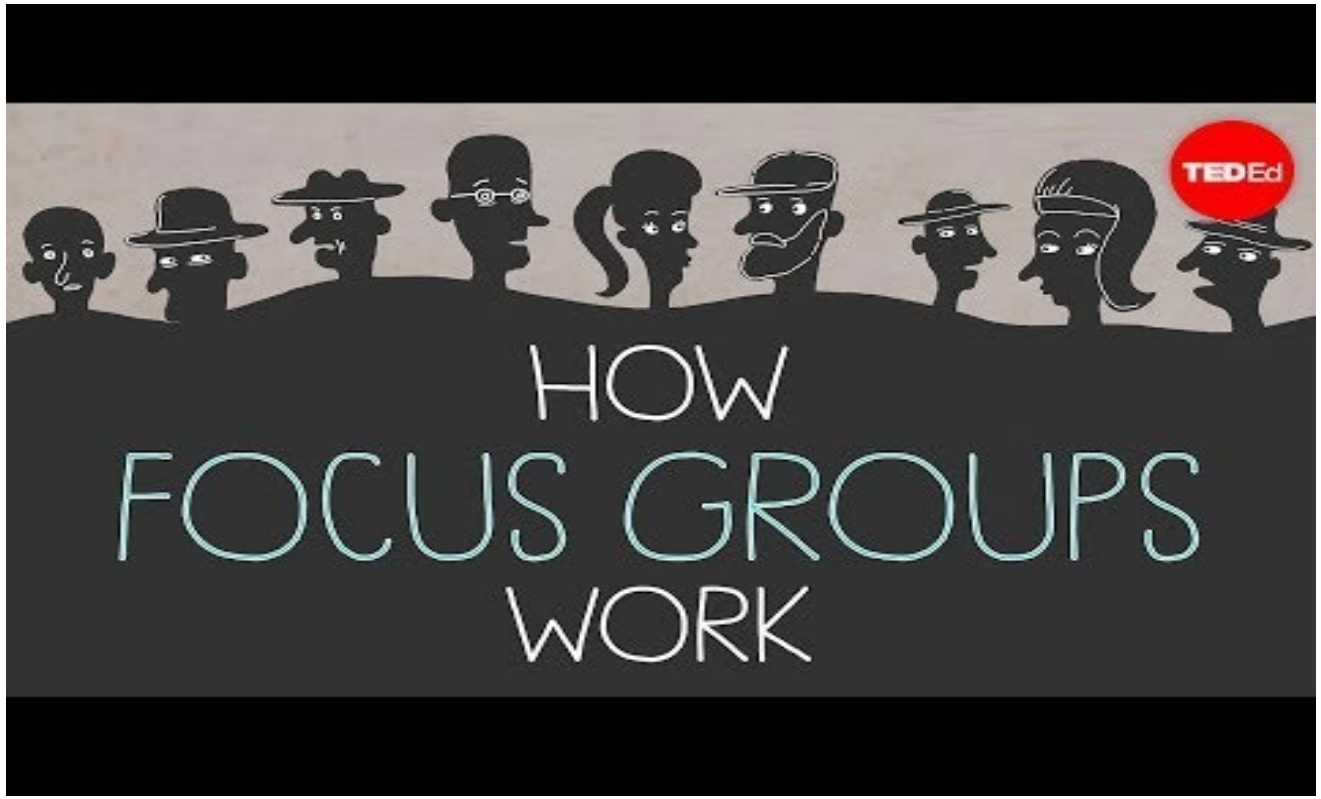
<u>You can use information from focus groups to</u>:

- **Generate ideas**
- Learn the respondent´s "**vocabulary**"
- Gain insights into basic **needs** and **attitudes**

- Focus groups represent 85% to 90% of the total money spent on qualitative research
- Regaining contact with customers when managers have lost touch
- 6-12 people in a dedicated room (normally with a one-way mirror for client viewing)
- It lasts approximately 90-120 minutes
- Important role of a moderator
- Result - a focus group report
- Important to count down votes (census, majority of votes)

# Focus Groups

Here you can find a TedEd explanation on the  functionality of focus groups:



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# Focus Group

Questions become more and more focused!

Not all questions are equal.

Different degrees of importance of questions:

- Opening (ice breakers)
- Introductory questions (introduces the topic)
- Transition questions (introduces the study)
- **Key questions (critical purpose of the focus group) they happen 20 minutes after you start the focus group**
- Ending questions

Do not ask key questions at the end!!!



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# Focus Group – preparing questions

- Brainstorming questions 5-6 experts
- Take notes
- Take a look at the list of questions and decide about the KEY questions
- Organize a flow of questions so that it feel natural
- Make all questions open-ended
- Put the questions in Word
- How many minutes the questions would take? Not all of them take the same amount of time
- The key questions should take MOST time
- Split focus group by time/questions
- 15 minutes at the end to wrap-up

Example:
What do you thing about the idea?
What is your feeling about the idea?
What words would you be using to explain this idea to your friends and neighbours?



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# Focus Group – Phrasing Questions

- 10-15 questions
- If you have 20-25 than it is very short
- Not enough time to go in-depth
- Short, specific and SWEET quetions, straight to the point
- Question should be SANDWITCHED : ask a question, explain and ask the question again
- Ask WHY?
- Give participants paper to draw pictures and flows of activities



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# Focus Group – how many questions?

Remember

- All questions must be ALIGNED WITH YOUR PURPOSE
- Questions should be the ones that are NEED to KNOW and not NICE to KNOW or FUN to KNOW



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# Focus Groups Examples

Here you can find two focus groups examples, one in the product FMCG sector and another one in the service sectors (broadcast). You can observe how both of them have their particularities and use different techniques.


Focus Group - Product (FMCG – household chemicals)

- Shelf impact
- Product Design Preference
- Purchase intention

Focus Group - Service (BBC news)

- Word Association
- Resonating Phrases
- Like/Dislike Service



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# Focus Groups Examples

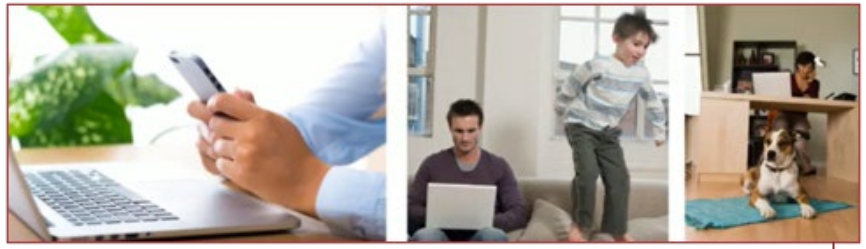
Different types: Video, Chat

**Pros:**

- Can have **more than one moderator** – technical moderator
- Participants can be **geographically separated**
- Participants more **comfortable**
- Get more information collected in **less time** (90 minutes maximum to avoid tiredness)

**Cons:**

- Moderator needs to be **extra engaging** in the online focus group  (Participants **distracted**)
- Participants **can´t try the products**



# How to Recruit People for Focus Groups?

- One of the biggest challengest of Market Research
- Participants have to come Where and When you need them
- One solution is Virtual Focus groups – challenge is to make them try products/services before
- You have to find homogenious group (they need to have something in comon – age, health condition, children, hobby, etc.)
- They have to be **information-rich** participants for the topic in question
- You can **survey** them first
- Try to find decision makers (who buys the product/service in the family)
- Incentivise them with money
- Do not limit yourselves to money, prepare a bundle of incentives
- Combine tangible and intangible rewards
- Overrecruit – it is better to have more candidates then less
- Make them feel they will make their community/city/school/company better
- If you want a very in-depth information do not make groups too big (fewer people is better -6)



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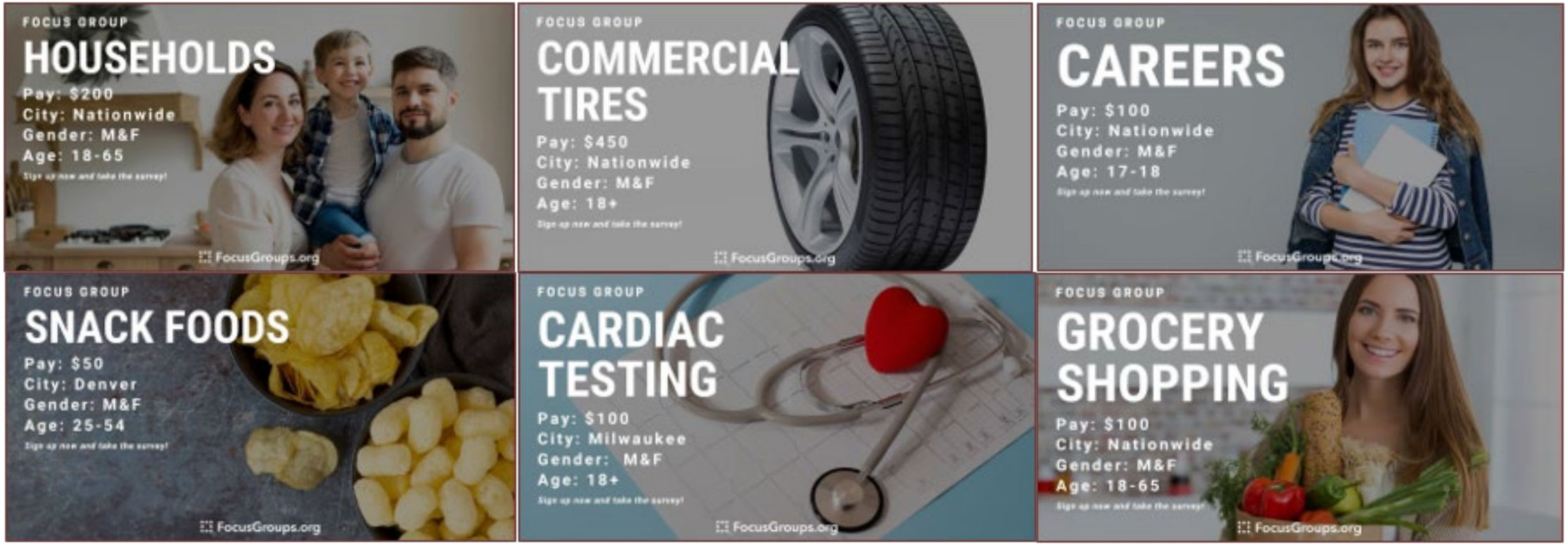
# Focus Groups Ads



# Analyse Focus Groups

- Analysis should be systematic
- Capture data using notes and audio/video recording
- You can transcribe the recording
- Discover and label different patterns
- Make a process of analysis, you must be able to describe your process



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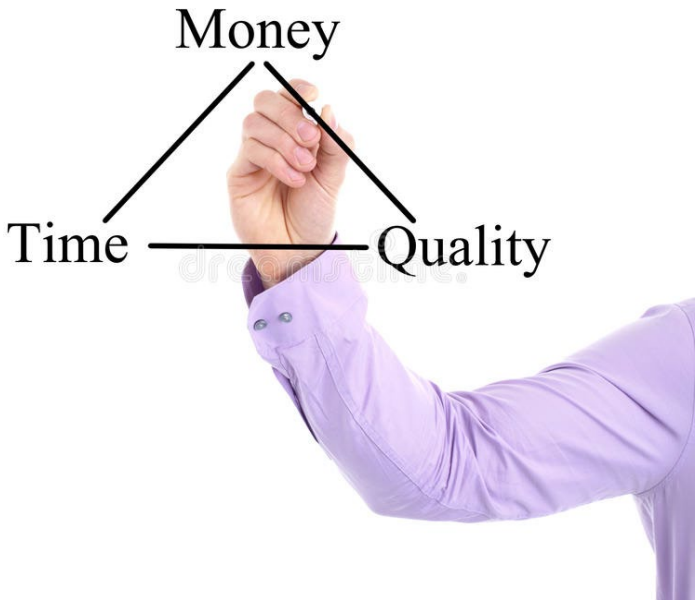
# How many focus groups?







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# In Depth Interview (IDI)

You can use an **In-depth Interview** technique that involves **a set of probing questions** posed one-on-one by an interviewer.

Here you can find in depth about **what the subject thinks** about something or **why he or she behaves** in a certain way.

- Better than focus groups for **investigating complex interrelationships, needs, motivations**.
- Performed at **respondents´ home or other location**, **also by phone**.
- New concepts, ideas, advertising, promotional messages can arrise from them.
- Interviewer should have **a list of questions**, normally **open-ended**.

  - **Pros**: Exploratory research generates many new ideas.
  - **Cons**: It takes a lot of time.
    Does not generalize findings. (descriptive research)
    Does nor find causal relations between cause and effect. (causal research)

# In Depth Interview (IDI)

- Some questions (the best is to record answers):
  - How is your online shopping routine?
  - Why is that so?
  - Could you give me some specific reasons?
  - How is your cooking/exercising/sleeping routine?
  - Can you elaborate on your point?




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# Observation Techniques

**Researchers observe behavior and record what they see**.

Normally, for this research the researcher uses **video or audio recorders, photographs, handwritten notes**, etc.

Types of observation:

1. **Direct** Vs. **Indirect** (Direct – shopping mall; Indirect – sales records)
2. **Overt** Vs. **Covert** (Overt – e.g. TV ratings, researchers identify themselves and explain the purpose of the research; Covert – e.g. Mystery Shoppers, researchers do not identify themselves);
3. **Structured** Vs. **Unstructured** (Structured – checklist of behaviors)
4. **In situ** Vs. **Invented** (In situ – observing people performing a task)


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# Mystery Shoppers

It may help you **understand** customer experiences.

Mystery shoppers:

- Ask questions
- Use services
- Visit premises (shops, bathrooms)
- Take pictures of products, shelves

It can be **used in any industry**:

- Retail
- Restaurants
- Gas Stations
- Government agencies
- Movie Theaters
- Tourism



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# Observation Techniques Pros and Cons

**Pros**:

- Things happen **naturally**
- Researcher **intrudes very little/not at all**
- Good option for researches that involve children who cannot verbalize likes and dislikes
- Good option for research of behavior with "Faulty recall"
- **Faulty recall** occurs when actions or activities are so repetitive or automatic that the observed person cannot recall specifics about the behavior.

**Cons**:

- **Sample** might be **small** (mystery shopping, covert observation)
- **Time consuming** - observe, record, take pictures, look it again, take notes, summarize
- **Researcher´s bias** leading to tentative conclusions
- Motivations and intentions cannot be observed, we don´t know **WHY**



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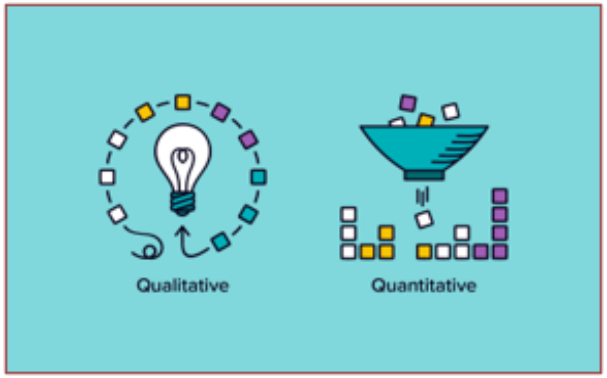
# Quantitative research

The main characteristics,
as the name suggests, is to describe a particular marketing phenomenon. **How consumers behave and think, feel?**

When we wish to know:

- **Who** are our customers?
- **What** brands they buy?
- **What** quantities they buy?
- **Where** they buy the brands?
- **When** they shop?
- **How** they found our products?




Descriptive research is desirable when we wish to project research finding to a larger population (if the sample is **repr esentative**).



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# Cross-Sectional Research

- The **most common** marketing research studies
- They have a **single data collection point**
- Sample population is measured only in one point in time
- One single **snap-shot** (photograph) of the **population**
- Normally employs a **large sample size**


For example, when a you want to know what customers think about the brand.
**Sample Survey** –
is a cross sectional research who´s sample is drawn in such a way to be representative of a specific population.

Pros - it is fast, easy, it gives quick overview
Cons - it won´t tell the general pattern, it could be misleading

"Photo of a population"
- Cross-sectional studies measure units from a sample at one point in time. (e.g. magazine readership)


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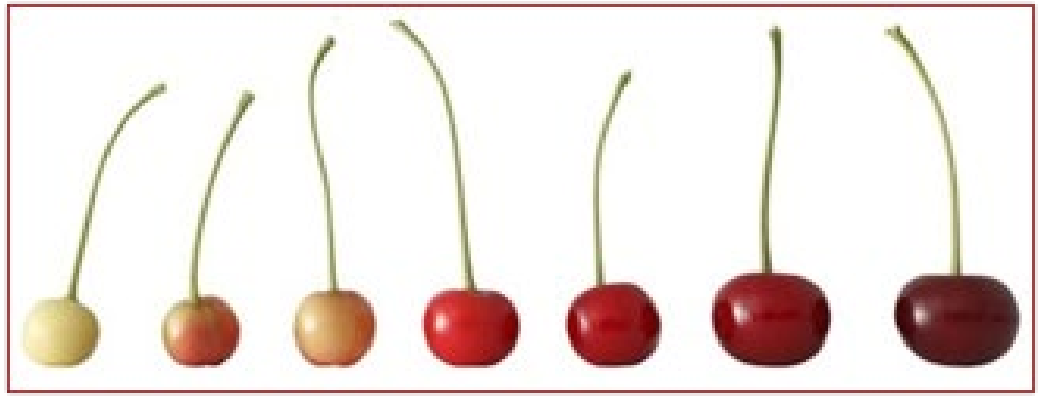
# Longitudinal Research

- The main difference is that there are **multiple data collection points**
- The **same sample units of population** participate over a period of time
- The same members of a sample are called **a panel**
- It is like a movie or a **video of population**





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# Longitudinal Research

- Longitudinal studies measure units from a sample during a longer period of time. It repeats observations of the same individual over time. (e.g. Low carb diet)

- Longitudinal studies are time-consuming and often **more expensive** than other types of studies, so they require significant **commitment** and **resources** to be effective.



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# Longitudinal Research

There are two types of longitudinal research studies (panels):

**Continuous (True) panel -** There are **exactly the same participants** participating in the reserach.
They are asked **exactly the same questions**.

Example - Exactly the same hotel guests that are repetitive guests.

Challenge – Maintain and stimulate people to particiate.

**Discontinuous (Omnibus) panel** - **different questions in each data collection stage**.

That is the most typical in marketing.



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# Panels

**Panels** are sample units who have agreed to respond to questions at periodic intervals.

- **Continuous** panels – ask participants always the same questions. (grocery shopping)

Pros - if the same group of respondents report their purchases continuously over a longitudinal period, we can determine repeat purchases and brand switching behavior.

Cons – difficult to manage.

- **Discontinuous** panels – vary questions from one panel measurement to the next.

Discontinuous panels are also called **omnibus panels** (multi-thematic).

***Omnibus*** means "including or covering many things or classes"

- Descriptive research can be **qualitative** and **quantitative**.



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# Descriptive Research Pros and Cons

**Pros**: It is fast to do, to set up & collect data.
It provides making specific predictions.
It provides statistical data.
It allows managers to have an overview of a pattern of consumers percetions.

**Cons**: Negative side is even though we have a general overview, we do not know the details.

For example **WHY** the satisfaction with service is lower of higher. (exploratory research)
We do not have cause and effect relationships. (causal research)


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# Causal Research

**Causality** can be thought as a statement: **"If X, then Y"**

**Independent Variables** are those variables over which researchers has control and wishes to manipulate. Example: **4P´s - price, product, place, promotion**.

**Dependent Variables** are the ones over which we have little or no control, but a strong intent in changing. Example: **sales, market share, customer satisfaction, salesforce turnover, net profits**.

**Extraneaous Variables** are the ones that might have impact on dependent variables, but are not independent variables.



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# Causal Research - Experiment

**Experiment** is manipulating an independent variable to see how it affects the dependent variable , while controllling the effects of additional extraneous variables.

**Experiemental design** is a procedure for devising an experimental setting so that a change in a dependant variable may be attributeted solely to the change in an independent variable. They control the influence of any extraneous variable.

**"True" experimental** design **isolates the effects** of the independent variable on the dependent variable while **controlling the effects on extraneous variables**.

**Quasi-experimental** design **does not control the effects of extraneous variables**. Control of extraneous variables is achieved by a **control group**, which is a group that has not been exposed to a change in independent variable, while **experimental group** has.



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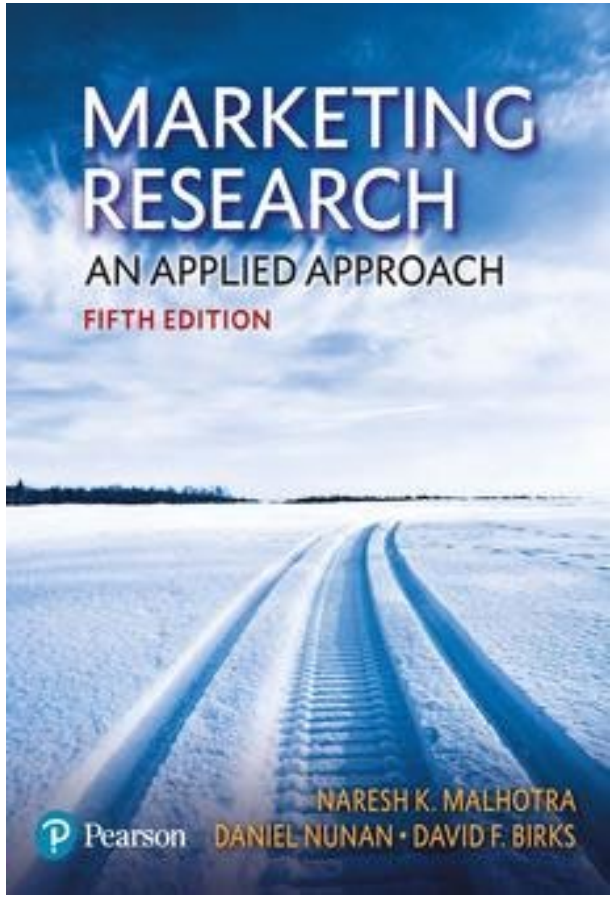
# Book Recommendation

**Book**:
Marketing Research
Malhotra et. al, 2017



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# Purpose of Research

He who asks is a fool for five minutes. He who does not asks is a fool forever.

Chinese Proverb

| *Issue* | *Purpose* | *Research question* |
|---|---|---|
| Market | Composition of customer market segment | Who is in our customer market segment? |
| Competitor | Consumers' perception of competition | What else do they buy and why? |
| Consumer | Motivation for purchase | What is the motivation for buying our product? |
| Product | Improvement of product | Does our product provide the desired benefits? |
| Promotional | Effectiveness of different messages and media | What and where do our customers hear about us? |
| Distribution | Ease of purchase | Is our product available at the right locations? |
| Pricing | Choosing pricing levels | What do our customers think of our price? |

# Quote




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info@global-business-school.org
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# Research Brief Template




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# Research Brief Guide

| | |
|---|---|
| **Background** | *Give any context that helps the researchers understand the challenge better. Try to be concise and relevant. What caused the need for research to take place? What markets are included? What do you already know about the market?* |
| **Research purpose** | *What is the #1 priority question that you need the market research to answer? You will likely have MANY questions, but identifying the key **single** question helps the research team prioritise. Consider whether this question is closed (should we launch Product x - Yes or No?) or more open (what's the best advertising message to drive sales of Product X?)* |
| **Objectives** | ***Business objective** : What is your end goal and how will it be achieved? e.g. how to grow sales by attracting new consumers.*<br>***Market research objective** : Summarise the research aims, information needs and list questions you need the research to answer. What decisions will you make with the research? This can go into more specific detail than the overall research purpose.* |
| **Research methods** | *Is your market research objective to understand an opportunity or challenge (which leans to qualitative) research methods or to measure and validate a hypothesis (which leans to quantitative research methods), Or both? If you have any expectations on the sample size, survey length and have any stimulus material already prepared, you should refer to these in this section. If you don't have these things, make clear your expectations of the researchers to respond.* |
| **Constraints** | *Are there any mandatory considerations or things to avoid? e.g. If there are any legal or regulatory requirements in the industry, if a particular group should or should not be included. Are there any geographic considerations the researchers should include?* |
| **Deliverables** | *What specifically must the project deliver and how will you define it as a success? Is there a specific reporting format you want?* |
| **Action standards** | *For any decisions that will be made on the basis of the research, list out the measures that will be used to evaluate the decision e.g. we will only launch Product X if (80%) of respondents say they will purchase.* |
| **Budget and timelines** | *Budgets will need to cover the market researchers time, any costs incurred with conducting interviews (e.g. hiring a venue) and production of any stimulus materials. It is not unreasonable to ask for details of costs. Also, be reasonable on timelines, it takes time to organise questionaires, invite interviews and compile reports so build this in to your timeline.* |
| **Stakeholders** | *Who will see the report and who will make decisions on it?* |

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# Research Brief Example

| | |
|---|---|
| **Background** | Three-brains ice cream shop want to test the market size potential of adding a vegan ice cream to its range of products. The opportunity was spotted based on an increasing trend seen in Keyword Search* and Social channels towards vegan friendly products. |
| **Research purpose** | What is the sales opportunity (total number of customers) over the next 12 months if we add vegan ice cream to our range? |
| **Objectives** | **Business objective** : Drive $500k in additional profit from new product launch by attracting new vegan consumers to our range<br>**Market research objective** : How many vegans can we target in the Sydney area? How many would be likely to purchase an ice cream from our shop? What would make them interested in such a product and more likely to buy and keep buying? (trial and repeat rates) |
| **Research methods** | We expect some qualtitative research (focus groups) to understand key drivers and barriers that would make vegans choose our ice cream. We then require some quantitative validation to support our business case in terms of the total target audience and potential customers. We can provide product samples, packaging images and descriptions of the production process as stimulus materials. |
| **Constraints** | We only sell in the Sydney area. and do not sell elsewhere. Our product is aimed at adults and we do not promote to under 18s. |
| **Deliverables** | We expect a short presentation which shows key drivers and barriers to vegans purchasing our ice cream; a recommendation on the route which drives the most sales; a forecast of sales (total number of customers, trial and repeat rates) for the first 12 months. |
| **Action standards** | In order to hit the target of $500k profit, we need to sell 100,000 units ($5 profit / ice cream).<br>Based on our other ice cream launches, the product needs to be trialled by at least 30% of the potential audience and have a repeat rate (more than 3 purchases in 6 months) of at least 10%. |
| **Budget and timelines** | Our total budget for this project is $50k, and we expect a research plan / response within 2 weeks and the final debrief in 6 weeks. |
| **Stakeholders** | Managing director, marketing director and the brand manager will be in the debrief. The marketing director is accountable for the overall go / no-go decision. |



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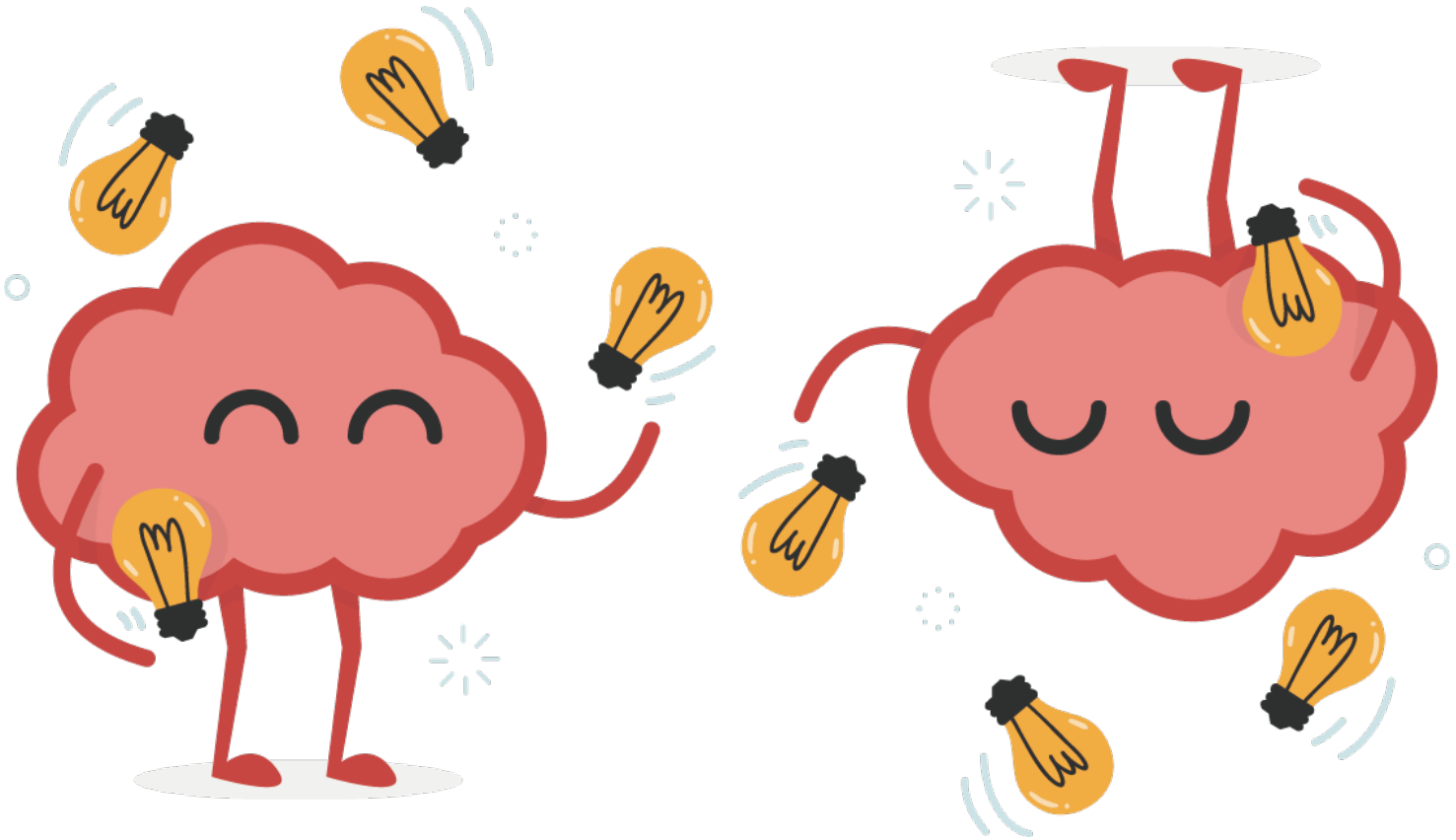
# Research Brief





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# Research Brief Template




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# What Will Be Your Deliverables?

#1: Prepare a document of your **market research brief in a** short presentation to present on out 1st individual tutoring 31/7.



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# Key Takeaways

- Marketing Research
- Internal and External Market Research Suppliers (DIY research, client-side research, agencies)
- Top companies
- Market research agencies´ fields
- Market Research Ethics
- Decision-making and marketing research
- There are three types of marketing research: exploratory, descriptive, causal
- Exploratory research is the one that is performed often first (but not necessarily)
- Exploratory research is used for ambiguous problems
- Descriptive research is used when there is awareness of the problem
- Descriptive research serves to answer questions – who, what, why, where, etc.
- Causal research is used when a problem is clearly defined
- Causal research gives the answer to connection between variables (if we change one what happens)
- Qualitative and quantitative research
- There are eleven main steps in the marketing research process
- Steps must be followed creatively and systematically.
- Research brief and research proposal


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# What Do You Understand For Qualitative Research?



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# What Can You Get from Qualitative Research?

Qualitative research is a type of research method that focuses on understanding and interpreting **social phenomena through non-numerical data**. It emphasizes capturing the perspectives, experiences, and meanings of participants in their natural settings.

Qualitative research shares these characteristics:

- seeks **answers** to predominantly open-ended questions
- **systematically** uses a predefined set of procedures to answer these questions in smaller sample size
- collects **evidence that provides for better in-depth understanding**
- **Wider knowledge of cultural and social context**
- produces findings that were **not determined in advance**
- produces findings that are applicable **beyond the immediate boundaries of the study**

It provides information about the “human” side of an issue – that is, the often contradictory behaviors, beliefs, opinions, emotions, and relationships of individuals.

Additionally, it seeks to understand a given research problem or topic from the perspectives of the local population it involves. Qualitative research is especially effective in obtaining **culturally specific information** about the values, opinions, behaviors, and social contexts of particular populations.



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# Quantitative Research


**John Sculley** (1939) - President of PepsiCo (1977–1983), CEO of Apple Inc.

In 1987, Sculley was named Silicon Valley's top-paid executive, with an annual salary of US$10.2M.

# Hint

**Accurate decision making:** A mix of quantitative research strongly backed by qualitative research is paramount for decision-making.



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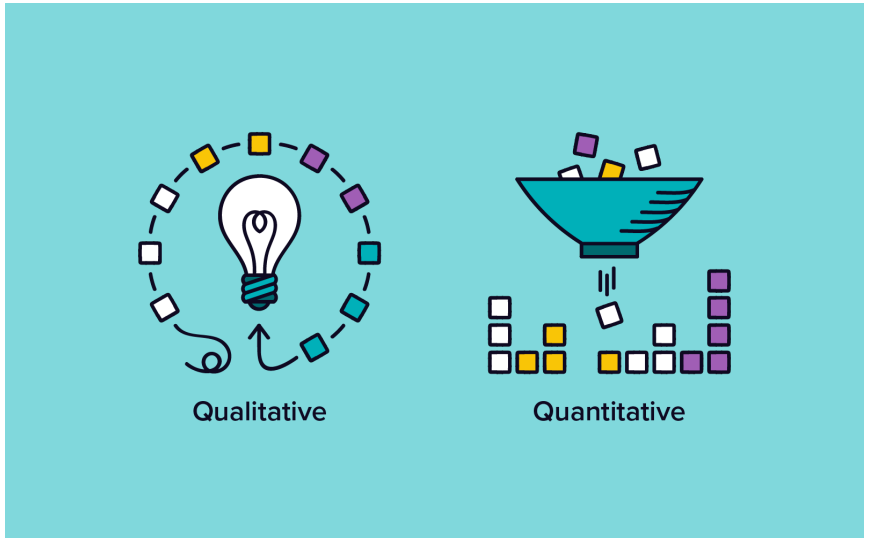
# Compare Quantitative & Qualitative Research

What are the basic differences between quantitative and qualitative research methods?

Quantitative and qualitative research methods differ primarily in:

- Their **analytical objectives**
- The **types of questions** they pose
- The **types of data collection instruments** they use
- The **forms of data** they produce
- The **degree of flexibility** built into study design



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# Qualitative Research

Qualitative methods are typically more flexible – that is, they allow **greater spontaneity and adaptation** of the interaction between  the researcher (you) and the study participant.

For example, qualitative methods ask mostly “open-ended” questions that are not necessarily worded in exactly the same way with each participant. The order of questions in interviews (IDI) is not always the same with various respondents on the same topic. You can use a semi-structured approach. **Follow the flow and respondent´s comfort**.

Prepare follow-up quetions. Seek clarification. You can have a pilot interview to **touch the pulse of respondents**.

With open-ended questions, **participants are free to respond in their own words**, and these responses tend to be more complex than simply “yes” or “no.”



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# Qualitative Research

PRO of qualitative methods

- **meaningful and culturally salient to the participant**
- **unanticipated by the researcher**
- **rich and explanatory in nature**




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# Ethnographic Research

**Ethnographic research** is the most **in-depth observational method** that studies people in their **naturally occurring environment**.

This method requires the researchers to **adapt to the target audiences' environments** which could be anywhere from an organization to a city or any remote location. Here geographical constraints can be an issue while collecting data.

This research design aims to understand the cultures, challenges, motivations, and settings that occur. Instead of relying on interviews and discussions, you experience the natural settings first-hand.

This type of research method can last from a few days to a few years, as it involves in-depth observation and collecting data on those grounds. It's a challenging and a time-consuming method and solely depends on the expertise of the researcher to be able to analyze, observe and infer the data.

It is a flexible method. You/researcher will not ask the same questions in the identical order. But still you will have your set of primary and follow-up questions set in yout **interview guide**.


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# Quantitative Research

Generally, quantitative methods are fairly inflexible. With quantitative methods such as surveys and questionnaires, for example, you/researchers will ask all participants identical questions in the same order.

The response categories from which participants may choose are “closed-ended” or fixed.

The advantage of this inflexibility is that it allows for meaningful comparison of responses across participants and study sites.

However, it requires a **thorough understanding of the important questions to ask**, **the best way to ask t**hem, and **the range of possible responses**.



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# What is meant by survey and questionnaire? Is there a difference?



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# Surveys and Questionnaires

Surveys and questionnaires are both research tools used to collect data from participants, but **they differ in their format, administration, and the depth of information they gather**. Here are the main differences between surveys and questionnaires:

Format

• **Surveys: A survey is a broader term** that refers to a **research method used to gather information from a group of people**. Surveys can use **various data collection methods**, such as face-to-face interviews, telephone interviews, online surveys, or mailed questionnaires.

• **Questionnaires:** A questionnaire is a **specific type of survey that involves a set of standardized questions** designed to gather data from respondents. Questionnaires are typically structured and can be administered in written or electronic formats.

# Surveys and Questionnaires

Administration

- **Surveys:** Surveys can be administered through different methods, including **face-to-face interviews, telephone interviews, online surveys, or mail surveys**. The administration method depends on the research goals, target population, and available resources.

- **Questionnaires:** Questionnaires are primarily administered **in a written or electronic format. They are self-administered by the respondents**, who read and respond to the questions without direct interaction with the researcher.

Interaction with participants

- **Surveys:** Surveys can involve both **direct and indirect interaction with participants**, depending on the administration method. Face-to-face or telephone surveys allow for real-time interaction between the interviewer and the respondent.

- **Questionnaires:** Questionnaires do not involve direct interaction between the researcher and the participants. They are designed to be self-explanatory so that respondents can complete them without assistance.


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# Surveys and Questionnaires

**Flexibility and depth of data:**

- **Surveys:** Surveys can collect both quantitative and qualitative data, depending on the types of questions used. They may include **closed-ended questions (multiple-choice, Likert scales) that provide structured and numerical data, as well as open-ended questions that allow for more in-depth responses**.

- **Questionnaires:** Questionnaires are more structured and typically focus on **closed-ended questions**. They are particularly suited for gathering standardized data and are less effective in capturing nuanced or detailed information.



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# Determine Research Design

| Exploratory | Descriptive | Causal |
| --- | --- | --- |
| • Goal: gather preliminary information, define problem, suggest hypotheses<br>• Usually based on qualitative approach<br>• Example: what kind of services could we provide around our product? | • Goal: describing in detail problems, situations, markets, and customers<br>• Both qualitative and quantitative approaches can be used<br>• Example: what age group buys our products? | • Goal: test hypotheses about cause-and-effect relationships<br>• Usually based quantitative survey or experimentation data<br>• Example: how do customers react to change in price? |

Flexible design
Broad scope
Fuzzy results

Rigid design
Narrow scope
Clear results



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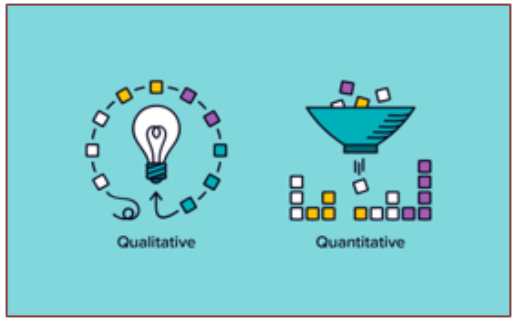
# Descriptive Research

The main characteristics, as the name suggests, is to describe a particular marketing phenomenon that is of interest for your project. **How consumers behave, think, feel?**

When we wish to know:

- **Who** are our customers/clients?
- **What** brands of products/services they buy/use?
- **What** quantities and qualities they buy/need/prefer?
- **Where** they buy/use the brands/products/services?
- **When** they shop/use applications/need services?
- **How** they found about our products/services?
- **Which** other products/services they buy/use?




Descriptive research is desirable when we wish to project research finding to a larger population (if the sample is **representative**).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# Descriptive Research - Survey


- The **most common** marketing research studies
- They have a **single data collection point**
- Sample population is measured only in one point in time
- One single **snap-shot** (photograph) of the **population**
- Normally employs a **large sample size**

**Sample Survey (Questionnaire)** is a cross sectional research whos sample is drawn in such a way to be representative of a specific population.

# Quantitative Research

**Conduct quantitative market research**

Quantitative research implies collecting first-hand information directly from a target audience in an organized manner using research tools like surveys, questionnaires, and polls.

**Reasons for you to conduct quantitative market research**

- **Generalize results:** Use the quantitative data to make generalizations of the general population based on the results of the sample respondents.

- **Draw conclusions:** Use quantitative research methods to draw conclusions about different areas of the business and take data-backed decisions.



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# Quantitative Research

- **Gauge customer perception:** Quantitative research is a great tool to use before launching products into the market to understand the potential customer's perception. (You can grasp customer perception of the competition)

- **Product feedback:** Ask feedback from your current customers or customers of your competition to know the areas you're or they´re lacking. You can thus take measures to improve the product or service.

- **Market plan:** You need a lot data to make a market plan before entering the market. Quantitative market research provides you with the data necessary to build a market plan.



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# Questionnaires Vs. Polls

Questionnaires and polls are both methods used to collect data from individuals, but they differ in their purpose, structure, and administration. Here are the main differences between questionnaires and polls:

**Purpose:**

• **Questionnaires:** Questionnaires are research instruments designed to gather data from participants for the purpose of conducting research, surveys, or assessments. They are often used in **academic studies, market research, and social science investigations to collect in-depth and detailed information on various topics**.

• **Polls:** Polls, on the other hand, are used primarily to **quickly measure public opinion**, preferences, or attitudes on a specific question or issue. They are commonly used in **media, politics, and social media platforms** to gauge the opinions of a larger population.



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# Questionnaires Vs. Polls

**Scope:**

• **Questionnaires:** Questionnaires tend to **cover a broader range of questions and topics**. They may include **multiple questions that explore different aspects of a subject**, allowing for a more comprehensive understanding of the participants' perspectives and experiences.

• **Polls:** Polls are usually more focused and **centered around a single question or a limited set of questions**. They aim to capture a **quick snapshot of public sentiment** on a specific topic without delving deeply into the reasons behind the responses.



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# Questionnaires Vs. Polls

**Sample Size:**

• **Questionnaires:** Questionnaires can be used with both **small and large sample sizes, depending on the research objectives and available resources**.

• **Polls:** Polls typically aim to reach a **larger population or sample size** to capture a representative snapshot of public opinion.



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# Descriptive Research – Pros and Cons


- **Pros**: It is fast to do, to set up & collect data.

  It provides making specific predictions.

  It provides statistical data.

  It allows managers to have an overview of a pattern of consumers percetions.

- **Cons**: Negative side is even though we have a general overview, we do not know the details.

  For example **WHY** the satisfaction with service is lower of higher. (exploratory research)

  We do not have cause and effect relationships. (causal research)

# Survey – Objectives and Elements

Questionnaire has three specific objectives:

1. **Translate the information needed into a set of specific questions** that participants can and will answer.
2. **Motivate the participant** to cooperate and complete the task.
3. **Minimize response error**.



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# Survey – Objectives and Elements

Questionnaire is only one element of  data-collection package, there are also:

1. **Instructions** on how to select, approach and question participants (**fieldwork procedures**)
2. **Rewards** for participants (gift, voucher – empathy with the participant)
3. **Communication aids** (images, maps, products, videos)



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# Fieldwork

Fieldwork interviewers should be selected to match respondents' characteristics. (You have to match them too!)

The job requirements will also vary with the nature of the problem and the type of data collection method, but there are some general qualifications of survey fieldworkers:

- **Strong** - Fieldwork can be **strenuous, stamina is required** to do the job (a lot of No´s as people are suspicious).
- **Outgoing –** You/Interviewers should be able to **establish rapport with respondents**. You/they should be able to relate quickly to strangers.
- **Communicative –** You/they must have effective **speaking, observation and listening** skills.
- **"Pleasant"** appearance - If a fieldworker's physical appearance is unusual (**from the respondents' perspective**), the data collected may be biased.
- **Educated** - Interviewers must have adequate language, communication and computer literacy skills.
- **Experienced** - Experienced interviewers are likely to do a better job in following instructions, obtaining respondent cooperation and conducting the interview.

Think about the possible language barrier when interviewing. Will your respondents speak fluent English? Do you need a local fieldworker?

# Survey Design – Steps to Follow

There are various steps to design a questionnaire / survey

**Do not start with preparing surveys in a survey software before having them prepared and checked in Word.**



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# Survey Design – Steps to Follow

You should follow these **steps to design a questionnaire / survey**:

1. Specify the information needed
2. Specify the type of interviewing method
3. Determine the content of individual questions
4. Overcome respondents´ inability or unwillingness to answer
5. Choose question structure (open ended, close-ended )
6. Choose question wording
7. Arrange the questions in proper order
8. Design form and layout
9. Publish the questionnaire
10. Pilot test to eliminate problems



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# Writing Questions Down

## How to start?

- Do not start your surveys with personal questions (Name, Age, Address, etc.)
- It can only scare your participants
- Maybe this data is not needed at all?
- Remember to ask only the questions that are NEED to KNOW and not NICE to KNOW



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# Qualifying Market Research Questions

Start with **Qualifying Market Research Questions**, also known as screening questions or eligibility questions, that are used in market research to **identify a potential respondent that can proceed with the research interview or survey.** Those who don't meet the criteria specified by Qualifying Market Research Questions are terminated from the survey and their responses are not taken  for analysis.

It would be uncommon for a survey to open to anyone to respond, as you should have a particular market or segment you want to study. Therefore, using Qualifying Market Research Questions helps to determine the right people are taking part and the results of the findings are actually meaningful.

Qualifying Market Research Questions are positioned at the beginning of a survey to allow only those eligible for the survey or interview to take place.

# Qualifying Market Research Questions

**Dedicate special attention to your eligibility question/s, we will comment them also in individual sessions!**

Have you purchased any artwork in the last year months? Have you purchased any artwork for more than 50 euros?

Are you: vegetarian/vegan/none of these

Who does the most grocery shopping in your household: me /my partner / my parents/ my kids / my roommate / all?

How many times have you done grocery shopping in the last 7 days?

Do you purchase second-hand clothing online? Have you purchase second-hand clothing in the last 2 months?



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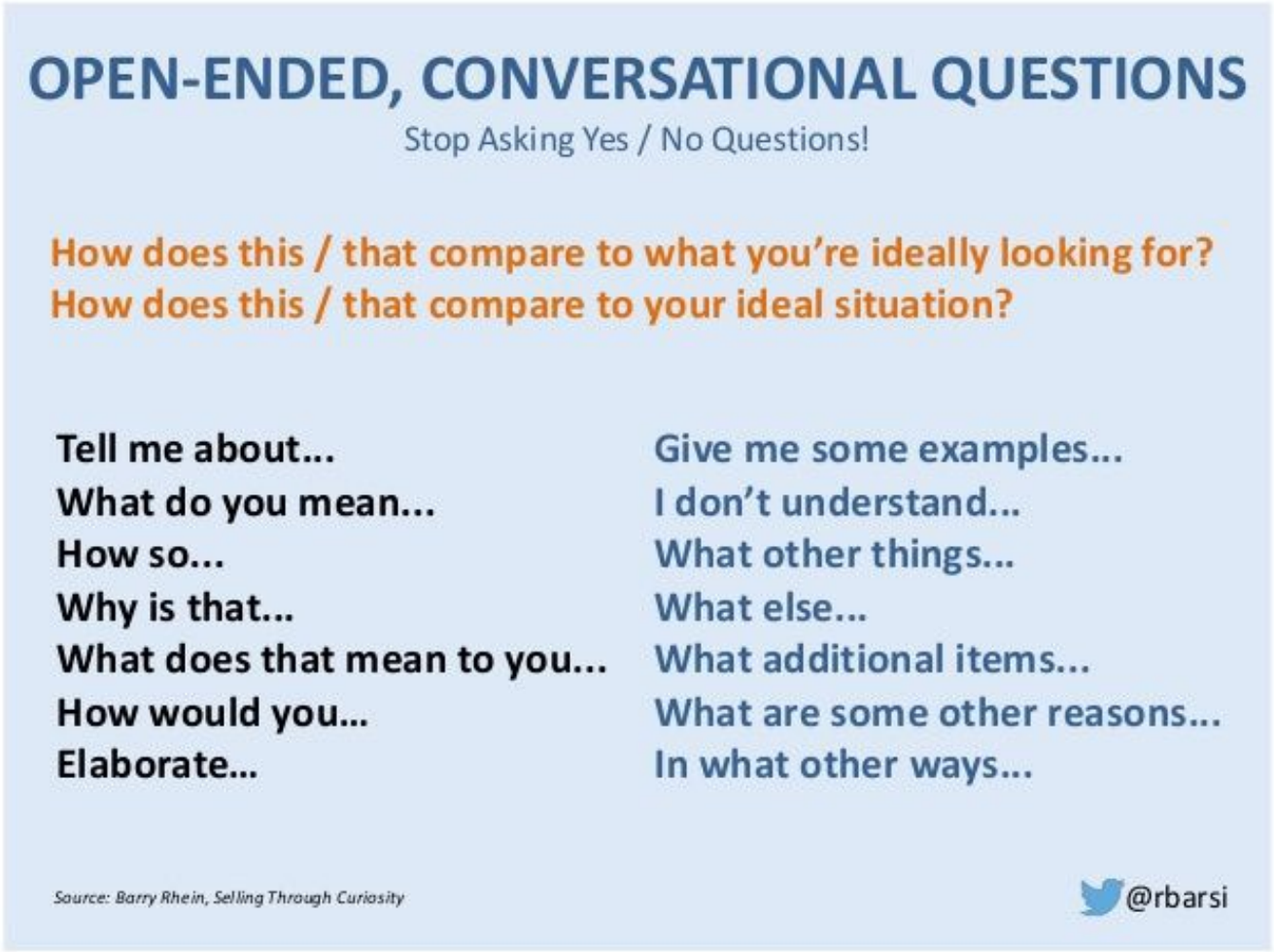
# Watch Out for Open-Ended Questions

The following questions are good for IDI, Ethnographical research, focus group, but NOT for surveys.



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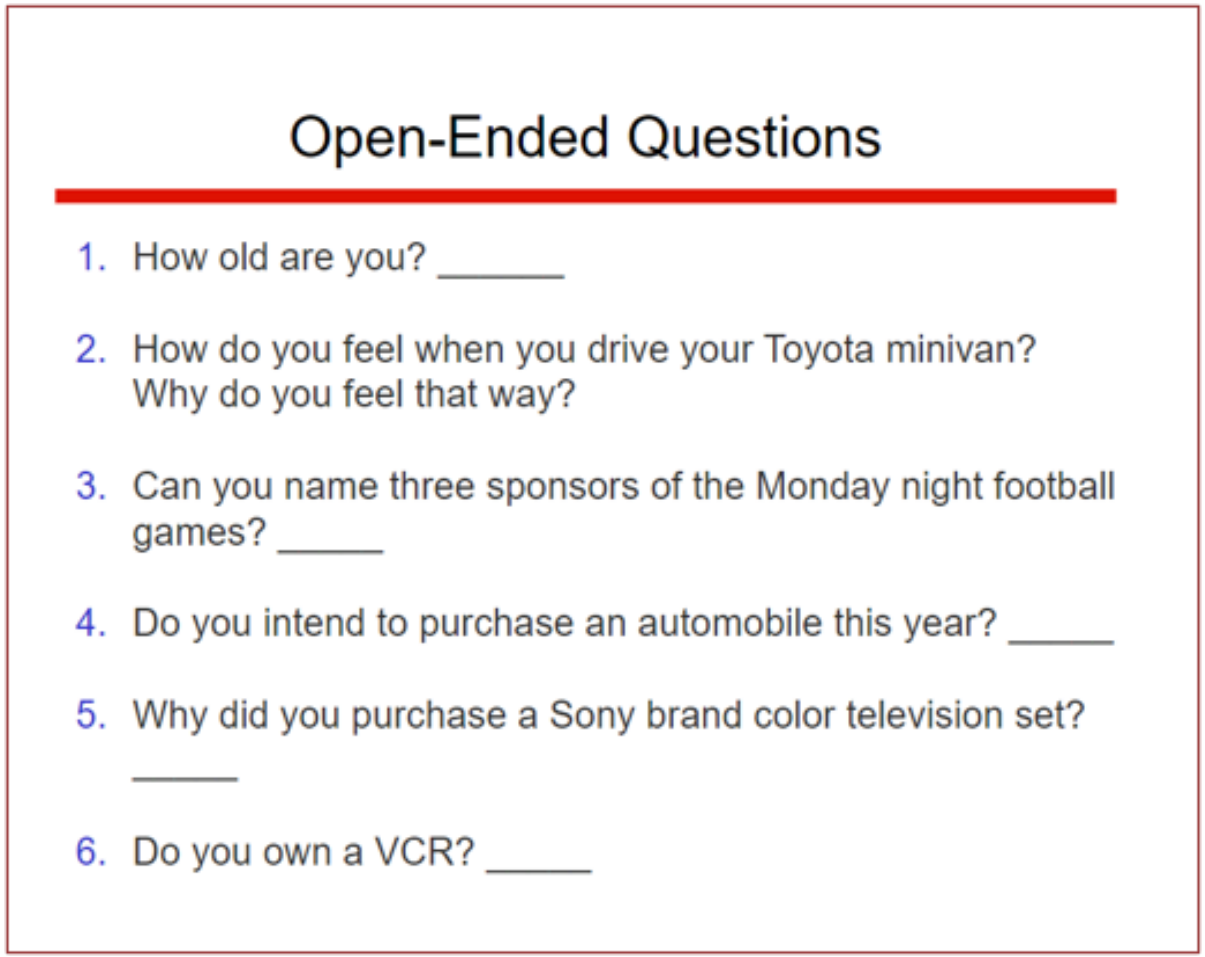
# Open-Ended Questions for Surveys




Which one of these questions should NOT be open-ended questions in a survey?

Why?



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# Watch Out for Open-Ended Questions

Analyzing open-ended responses ranks as a top challenge!

It also brings great rewards as they uncover customer insights, but...

You must make a good balance between open and closed questions!



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# Example Open-Ended Question Responses

Let´s imagine your open-ended question on ecological food items that reponsents buy gave you the following 9 answers (only) and you have to summarize them. You must present them in a report. You can´t just list them, of course!!! What will you have to do?




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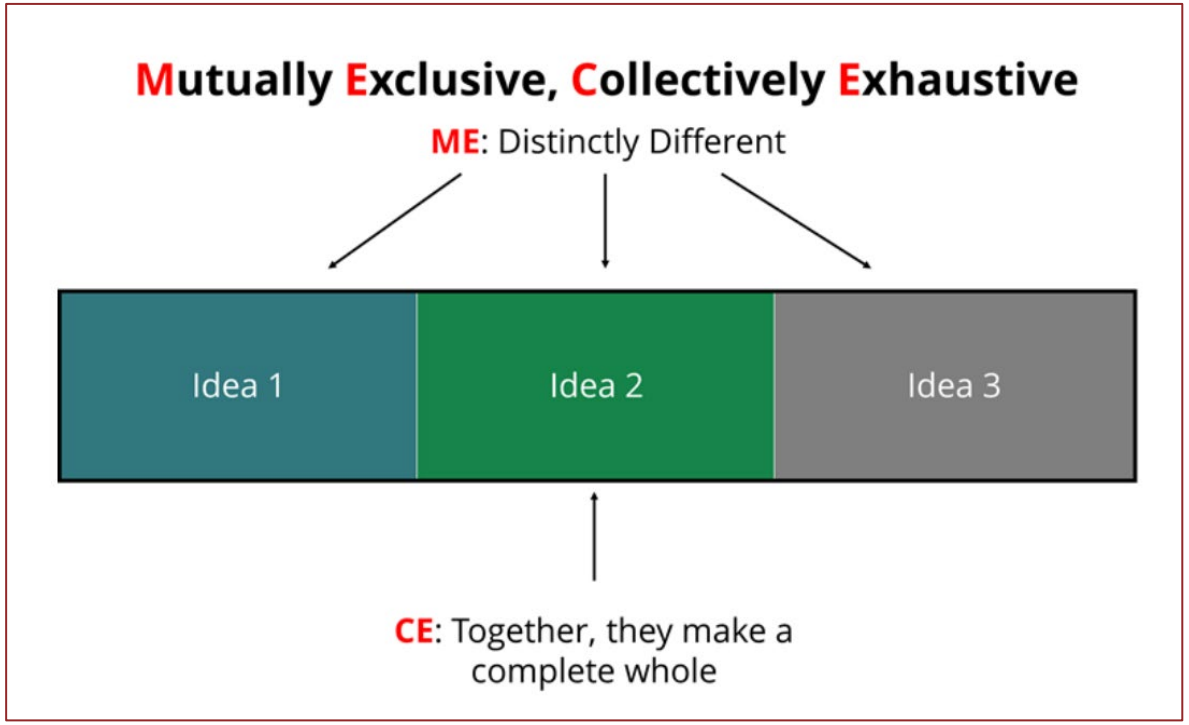
# Group Items

- **Bakery Items**: Bread, Muffin, Bagel
- **Frozen Food**: Popsicles, Ice Cream, Fish Sticks
- **Fresh Fruit**: Strawberry, Banana, Grapes



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# Group Items

What is **MECE** ("mee-see") and what is the difference?
MECE is made up of two parts.

**First, "mutually exclusive"** is a concept from **probability theory** that says **two events cannot occur at the same time**.
If you roll a six-sided dice, the outcomes of a six or a three are **mutually exclusive**. When applied to information, mutually exclusive ideas would be distinctly separate and not overlapping.

**Second, "collectively exhaustive"** means that the set of ideas is inclusive of all possible options.
In the six-sided dice example, the set {1,2,3,4,5,6} is **mutually exclusive AND collectively exhaustive**.



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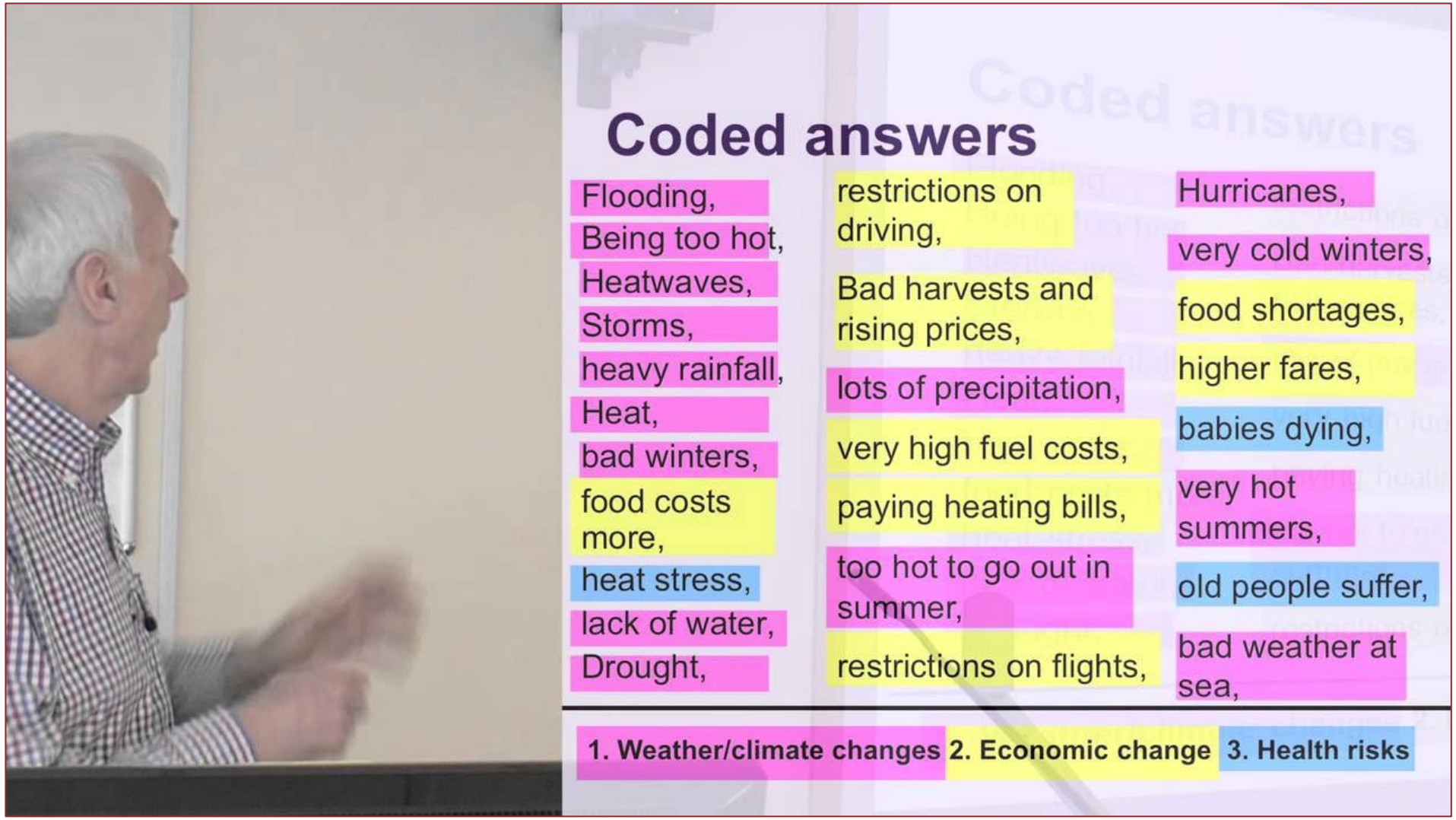
# Open-ended Question Coding

## What worries you about climate change?

- Flooding
- Beeing too hot
- Heatwaves
- Storms
- Heavy rainfall
- Heat
- Bad winters
- Food costs more
- Heat stress
- Drought
- Lack of water
- Restrictions on driving
- Bad harvests and rising prices
- Lots of precipitation
- Very high fuel costs
- Paying heating bills
- Too hot to go out in summer
- Restrictions on flights
- Hurricanes
- Very cold winters
- Food shortages
- Higher fares
- Babies dying
- Very hot summers
- Old people suffer
- Bad weather at sea

# Open-ended Question Coding



# How to do this categorization?

## 5-step Bucketing Technique



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# 5-step Bucketing Technique

1. **Read every single response**. Here you get a real feel for the data. You will notice trends and have the opportunity to highlight quotes that can add spectacular insights.

2. **Create your buckets.** Buckets are simply different categories into which you will place the various responses. Each bucket represents a trend you've identified, and some responses may contain multiple ideas that belong in multiple buckets.

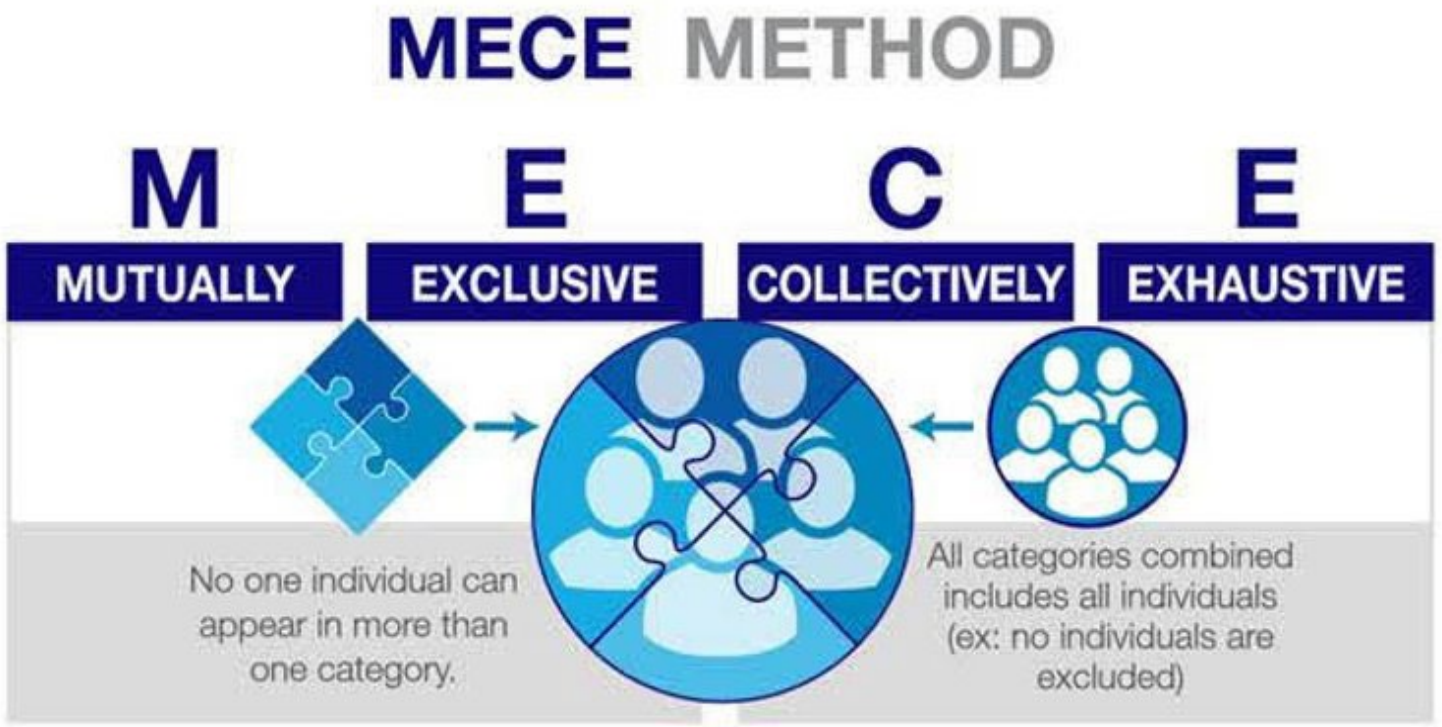
3. **Examine and organize your buckets.** Once you've placed each response in its appropriate bucket or buckets, review your buckets to see if any can be combined or need to be split. This gives you the chance to identify clear issues, trends and new ideas provided by participants.

# Bucketing Technique

**4. Pinpoint the meaning and the context of collected responses.** Combine your open-ended responses with relevant close-ended responses to generate actionable data. Perhaps you ran across an “other” answer that outshines the offered responses in a single-select question. Or maybe you uncovered fresh information on why customers opt for (or do not opt for) certain product or service.

**5. Sum it all up.** Your final step is to create a summary of the major trends you’ve identified throughout your open-ended question analysis. Back up trends with key quotes you’ve highlighted and any relevant comments from survey participants. Those highlighted quotes can likewise come in handy for grabbing attention when presenting your findings.

# Bucketing Technique



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# Instead Use Other Type of Questions

1. **Takes too much time** to answer out-of-the-box
2. Easier to **analyze the responses**

You may be tempted to reach for any number of tools that promise to help with analysis of open-ended data, but they are unlikely to give you the same depth and accuracy as you get by manually analyzing the results.



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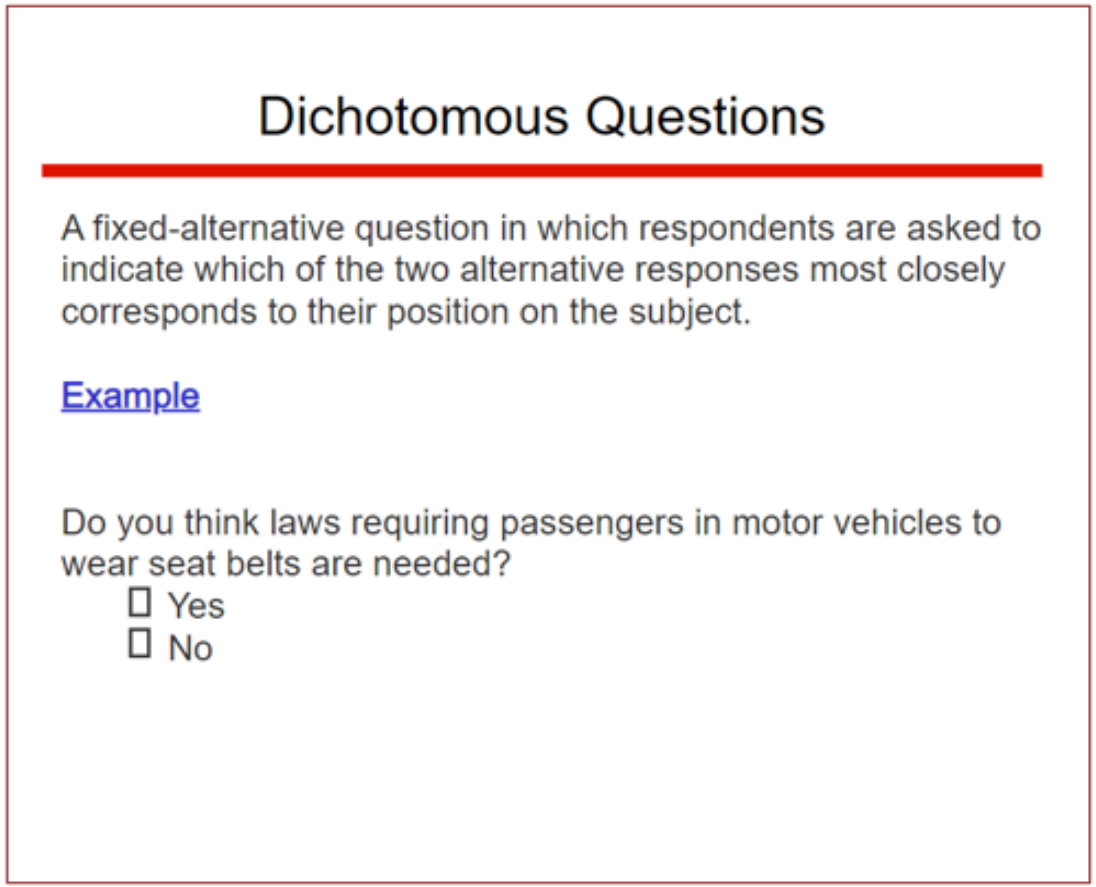
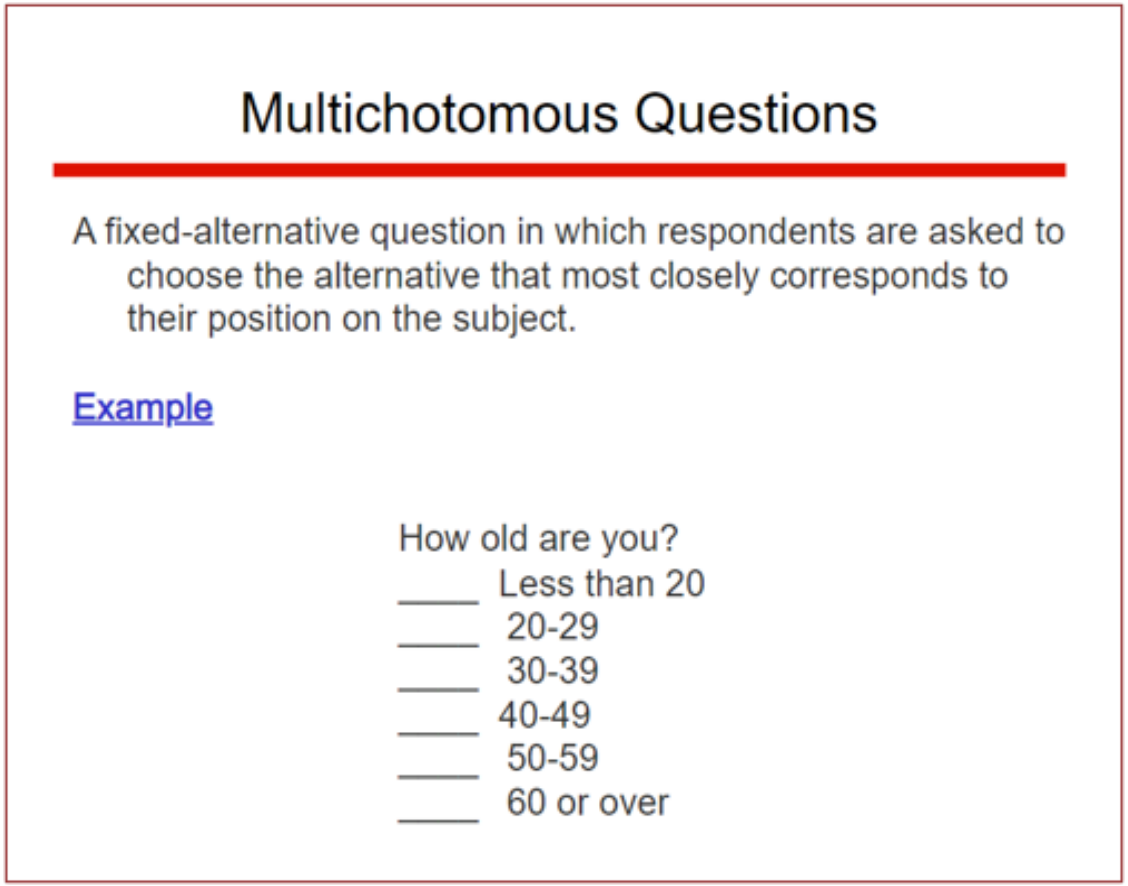
# Dichotomous Questions



# Multichotomous Questions



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# Watch out for Open Questions Part 2

Opening your survey with open-ended questions may be a great way to **scare away participants** and make them **leave your survey**!

***Open questions should instead be strategically placed throughout your questionnaire.***

You can use them to give participants an “other” response option if none of the pre-selected responses of a multiple choice questions apply, providing a text box for their answer.

You can also pair open questions with multiple choice closed questions to gather more information on **why** a participant responded the way they did.

For instance, you can first ask about their level of customer service satisfaction, giving them multiple choices that range from “Excellent” to “Poor.” The next question can be an open-ended one that asks why they rated their satisfaction at that particular level.



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# Pay Attention to Sequencing

## Guidelines for Question Sequencing

- Use simple, interesting opening questions
- Use the funnel approach, asking broad questions first
- Carefully design branching questions
- Ask for classification information last
- Place difficult or sensitive questions near the end



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# Watch Out for the Wording

## Guidelines for Question Wording

- Use simple words and questions
- Avoid ambiguous words and questions
- Avoid leading questions
- Avoid implicit alternatives
- Avoid implicit assumptions
- Avoid generalizations and estimates
- Avoid double-barreled questions



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# What are Leading Questions?

How can you avoid them?

Leading questions are questions that are worded in such as way as to influence participants' responses – in other words, questions that lead participants along a particular line of thinking.

Asking leading questions risks conveying your own value judgments and biases and imposing a perspective on participants. When asked a leading question, participants are likely to provide a response that accords with it simply because they are reluctant to contradict the interviewer.

To avoid this, ask neutral questions free of preconceptions. We will see now some examples of leading and unbiased questions.



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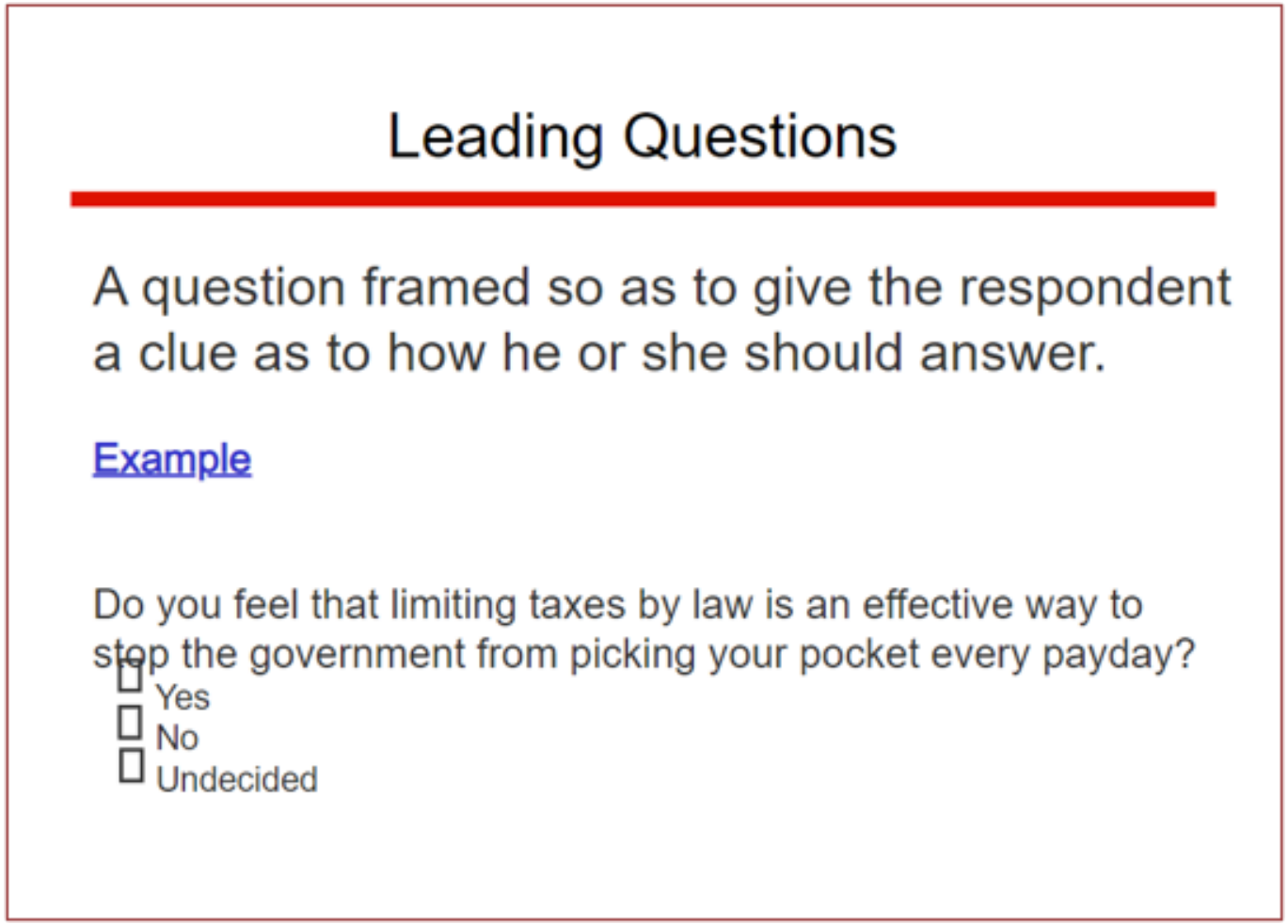
# Watch Out for Leading Questions!




What is your position on limitting taxes by law?

- Disagree
- Neutral
- Agree



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# How to set Non-Leading Questions in a Qualitative Survey?

Direct questions:

- “What do you mean when you say . . .?”
- “Why do you think . . .?”
- “How did this happen?”
- “How did you feel about . . .?”
- “What happened then?”
- “Can you tell me more?”
- “Can you please elaborate?”
- “I’m not sure I understand X. . . . Would you explain that to me?”
- “How did you handle X?”
- “How did X affect you?”
- “Can you give me an example of X?”



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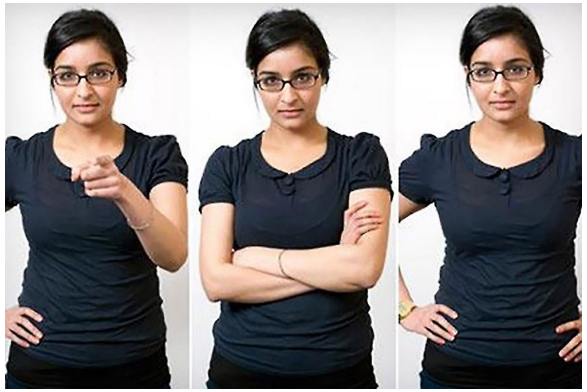
# Sometimes we are not aware of leading...

**Tone** refers to the volume and sound quality of a person's voice. It can reveal biases such as excitement, approval and disapproval, scorn, surprise, and disbelief. Remember that cultural context affects how tone of voice will be interpreted – what is moderate in one context may seem inappropriately loud in another.

**Body language** is the culturally specific interpretation of what it means to move or position the body in a particular way. Facial expressions are perhaps the most obvious example, but gestures, posture, and constant movement can also be powerful indicators of a person's mood, opinion, and evaluative stance. Interviewers should be conscious of their body language at all times





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# Sometimes we are not aware of leading...

**Indirect probes**:

• Neutral verbal expressions such as “uh huh,” “interesting,” and “I see”

• Verbal expressions of empathy, such as,“I can see why you say that was difficult for you”

• Mirroring technique, or repeating what the participant said, such as,“So you were 19 when you had your first job . . .”

• Culturally appropriate body language or gestures, such as nodding in acknowledgment



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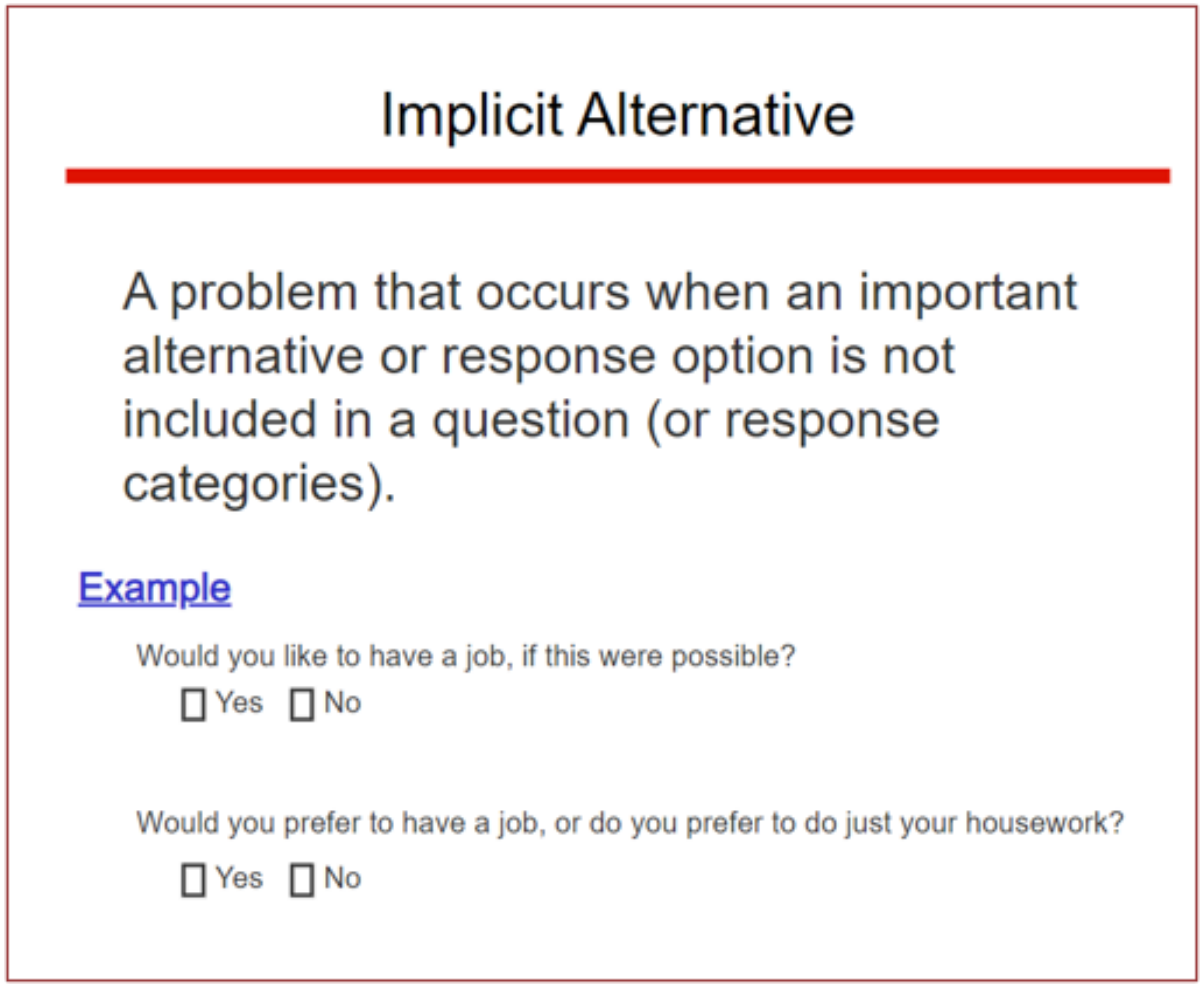
# Watch Out for Implicit Alternative!



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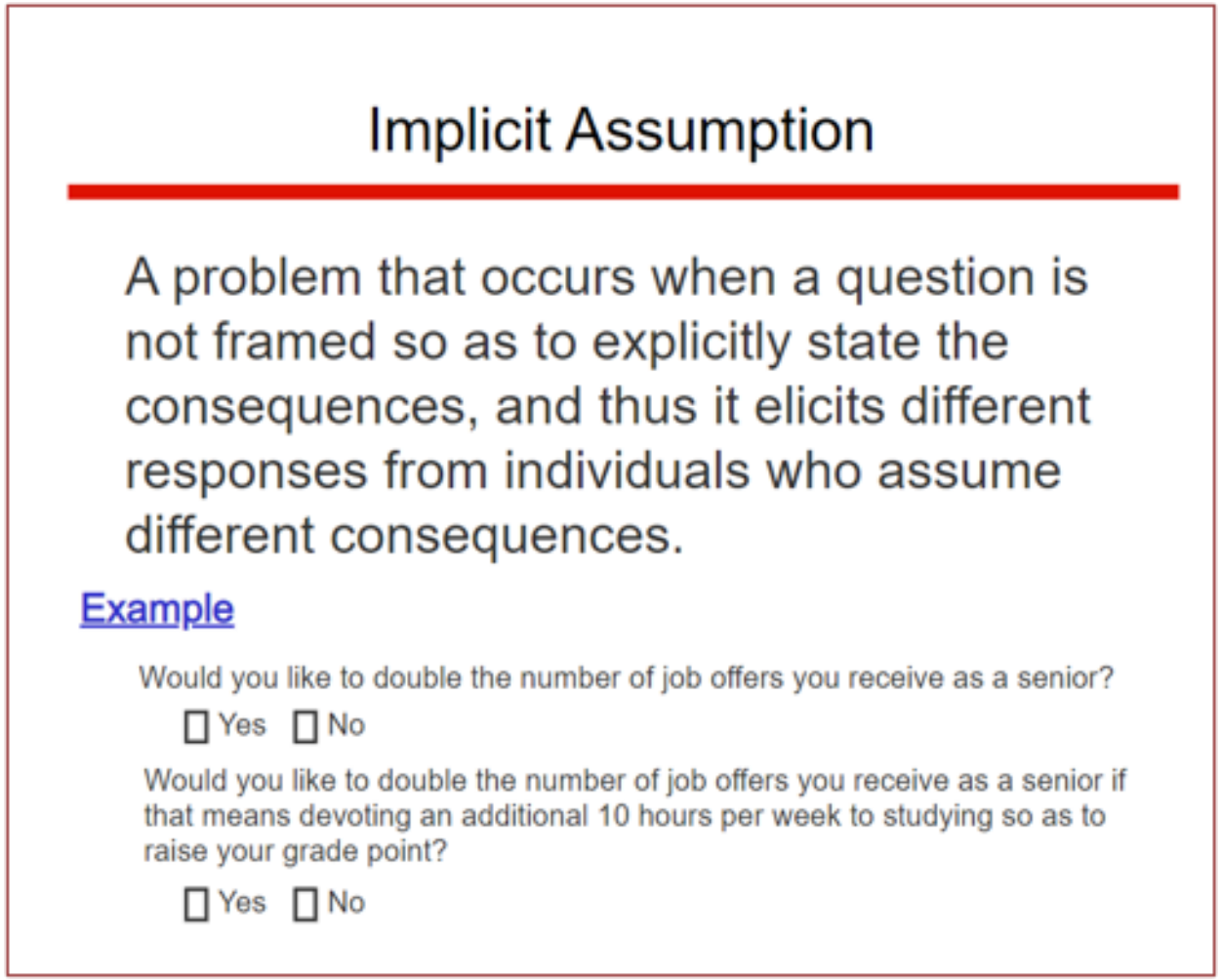
# Watch Out for Implicit Assumption!



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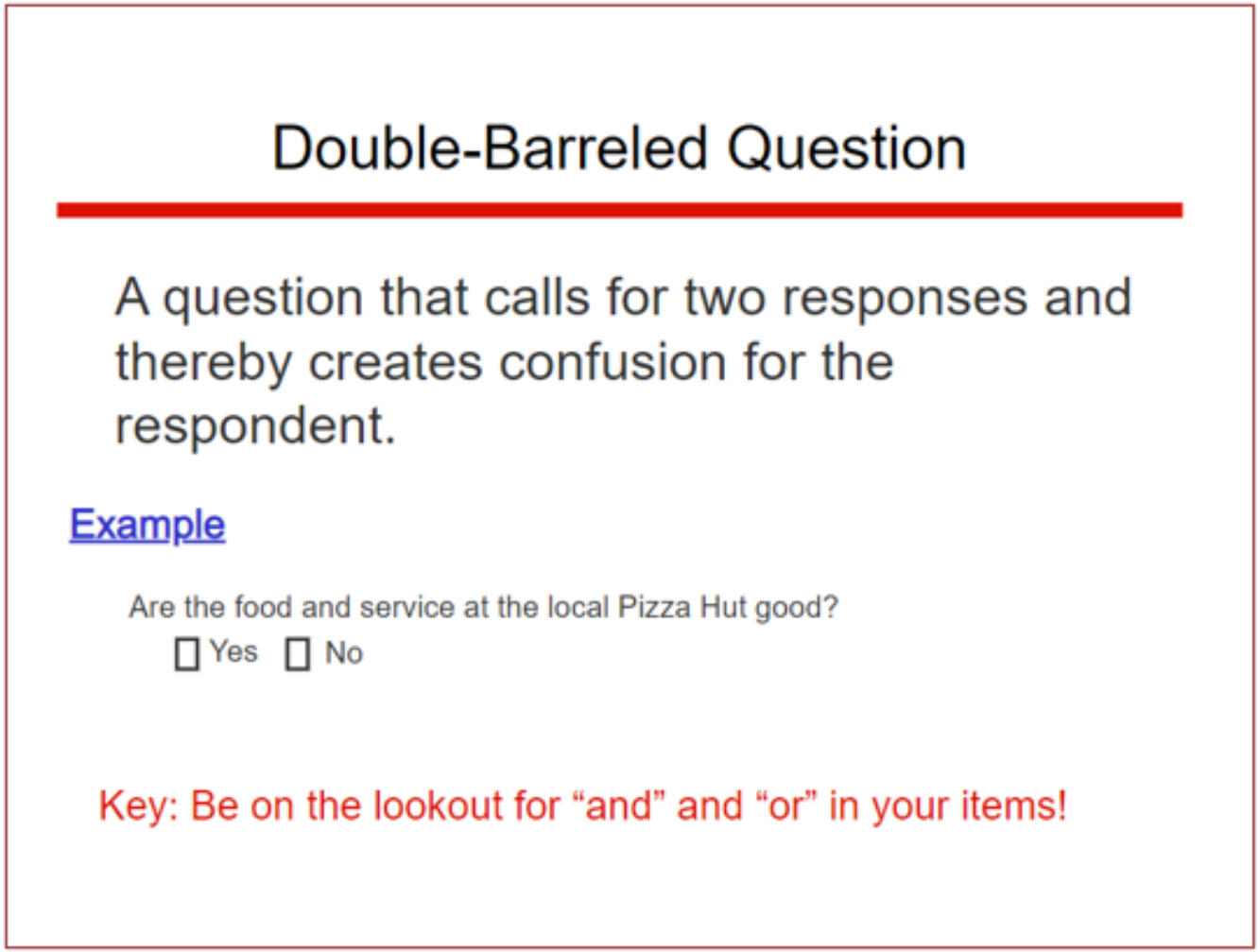
# Watch Out for Double Barrel!



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# Pretesting is Compulsory

## Pretest

Use of a questionnaire (or observation form) on a trial basis in a small pilot study to determine how well the questionnaire (or observation form) works.

ALWAYS PRETEST DATA COLLECTION FORMS!!!!!



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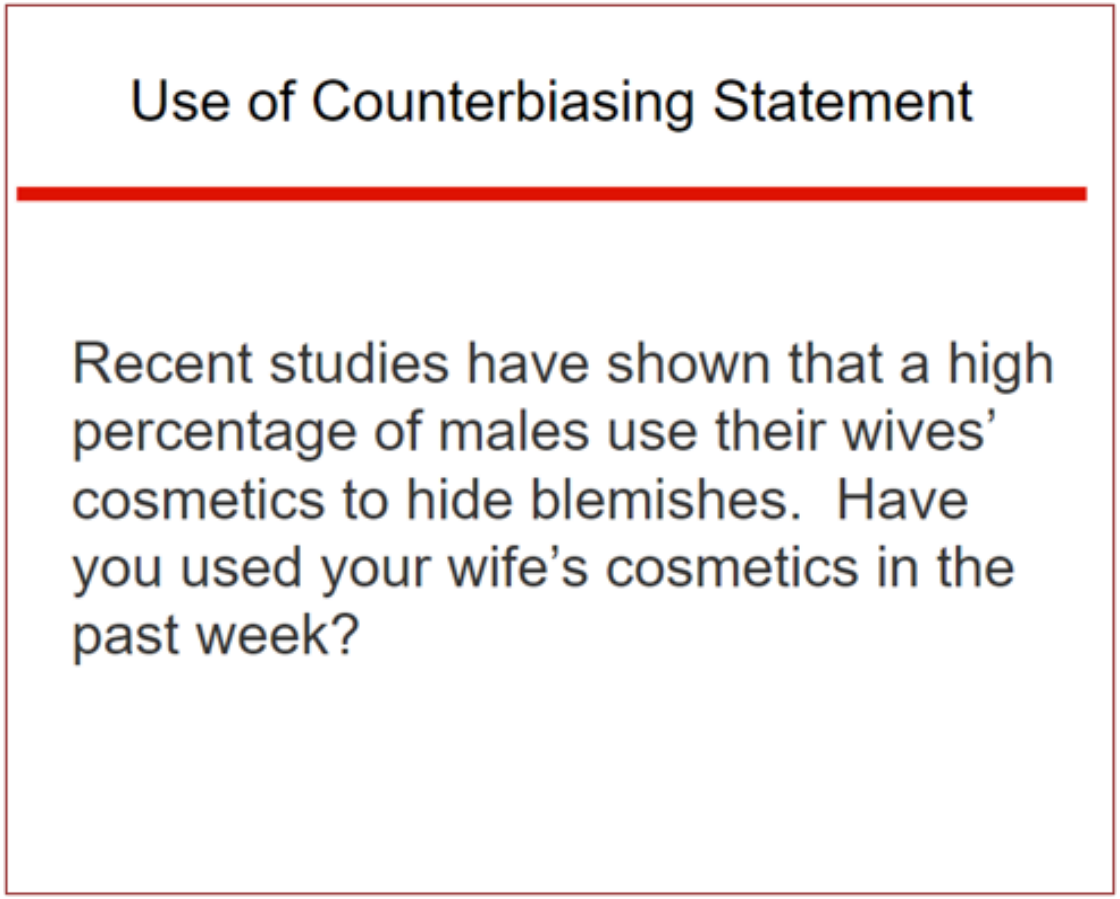
# "Soften" the Context



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# Visual Appeal is Important!

Don´t forget that survey
already forms part of your brand!

Add Visuals, brand colors, videos, etc.

## Physical Characteristics of Questionnaire: Suggestions

- questionnaire should appear simple to complete (white space is your friend!)
- minimize number of pages (smaller fonts are OK, provided form appears simple)
- mix-up response formats occasionally (avoids response set bias and breaks monotony)
- use directions as necessary for each group of items, but keep them short and simple
- number items within each section
- have respondents check boxes rather than lines
- use shading, boxes, lines, etc., to keep it interesting



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# Survey Question Wording

**Careful with wording!!!**

- Define the issue. *Which e-commerce apps do you use? 'who', 'what', 'when' and 'where'*
- Use ordinary words. *Match the vocabulary level of the target participants.*
- Use unambiguous words. *'usually', 'normally', 'frequently', 'often, 'regularly', 'occasionally'*
- Avoid leading or biasing questions. *A leading question clues to the desired answer.*
- Avoid implicit alternatives. *Do you like buying online or would you rather shop in a brick-and-mortar shop?*
- Avoid implicit assumptions. *Consequences of the statement – Would you still buy online if the delivery cost more than 6 euros?*
- Avoid generalizations and estimates. *The annual per capita cost on ecologic food in your household?*
- Use positive and negative statements. *Use dual statements, some positive & some negative.*



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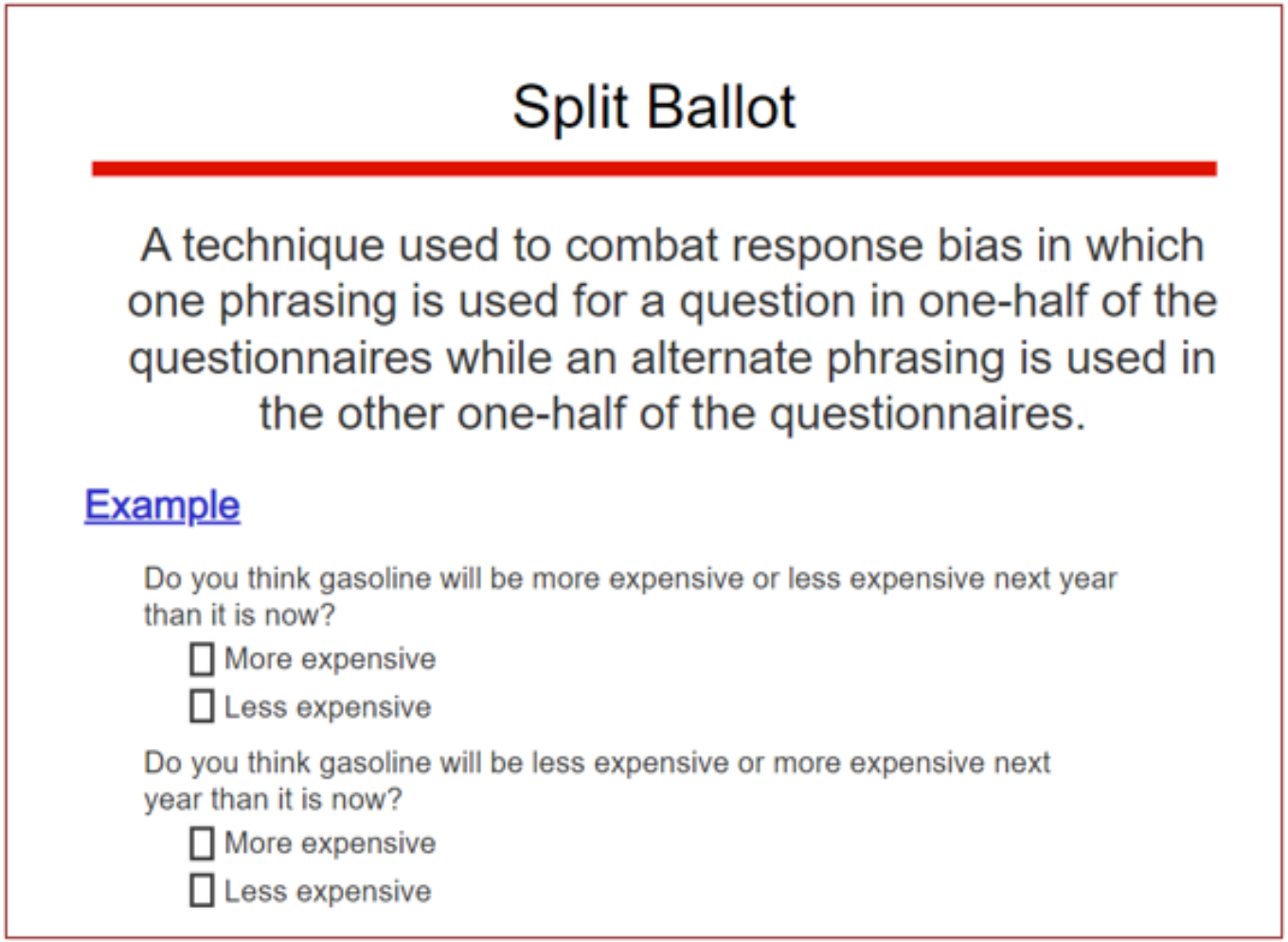
# Useful Split Ballot Technique



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# Arrange the Questions in Proper Order


**Hints and tricks:**

- The opening questions should be interesting, simple and non-threatening.
- Qualifying questions (eligibility) should serve as the opening questions.
- Basic information should be obtained first, followed by classification and finally identification information.
- Difficult, sensitive or complex questions should be placed late in the sequence.
- General questions should precede specific questions.
- Questions should be asked in a logical order.
- Branching questions should be designed carefully to cover all possible contingencies.
- The question being branched should be placed as close as possible to the question causing the branching, and the branching questions should be ordered so that the participants cannot anticipate what additional information will be required.

# Fieldworker Errors

**Leading respondents**

- Wording (example: Do you/Don´t you, Is it/Isn´t it)
- Voice inflection (phone interviews)
- Body language (node for yes/no while questioning plants a seed in the mind)
- Subtle leading (phone interviews "unhuh"/"okay")

**Control** - **Orientation sessions** and **role-playing**




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# Unintentional Fieldworker Errors

**Unintentional fieldwork errors** occur when interviewers commits errors **while believing to perform correctly**.

Reasons:

- Gender (sensitive topics)
- Tone of voice (monotonous voice demotivates participants)
- Lack of experience
- A mere presence of the interviewer
- Fatigue  (slip-ups, wrong note-taking, skip pattern, forget details)

# Intentional Fieldworker Errors

**Interviewer cheating**

- Compensation system is often the reason for these errors
- Interviewers are normally paid by completed interviews, not by hours
- Interviewing respondents that are not in the sampling plan
- Long hours and frustrating work might make an entrance to cheating
- Big temptation to hand in **bogus** completed interviews

**Control** – **Supervision** and **validation** (call back 10% respondents to assure they were interviewed)

# Intentional Fieldworker Errors

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**Control** – **Supervision** and **validation** (call back 10% respondents to assure they were interviewed)

# Sampling

**It is a capital mistake**
**to theorize**
**before one has data.**

## Quote of the Day

Sir Arthur Ignatius Conan Doyle
(1859 – 1930), Scottish physician and writer,
most noted for his stories about Sherlock Holmes)

# Sampling

Most common objective of marketing research is to **obtain information about** the characteristics of a **population**.

**Population** - The **aggregate of all the elements**, sharing some common set of characteristics, that comprise the universe for the purpose of the marketing research problem.

**Census** - A complete enumeration of the elements of a population or study objects.




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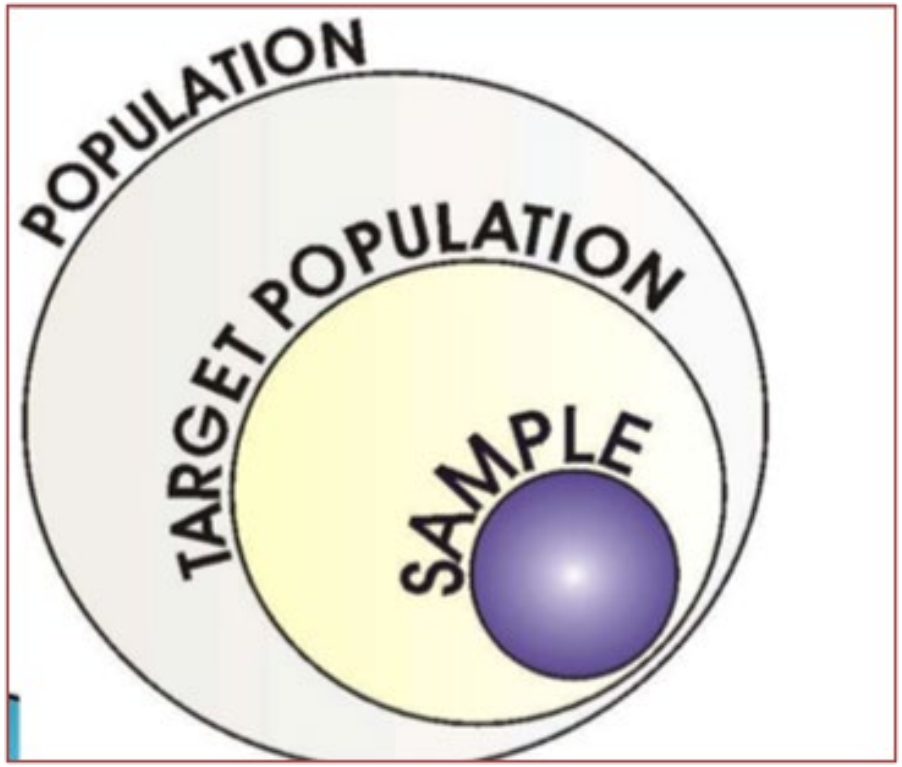
# Sampling



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# Sampling

There are two big groups of sampling methods:

**1. Non-probability sampling** - does not use chance selection procedures but rely on the **personal judgement of the researcher**, who arbitrarily or consciously decides which elements to include in the sample.

The estimates obtained are **not statistically projectable to the population**.

**2. Probability sampling** - Each element of the population has **a fixed probabilistic chance of being selected** for the sample.

**The projections about the population from which the sample was drawn can be made**.



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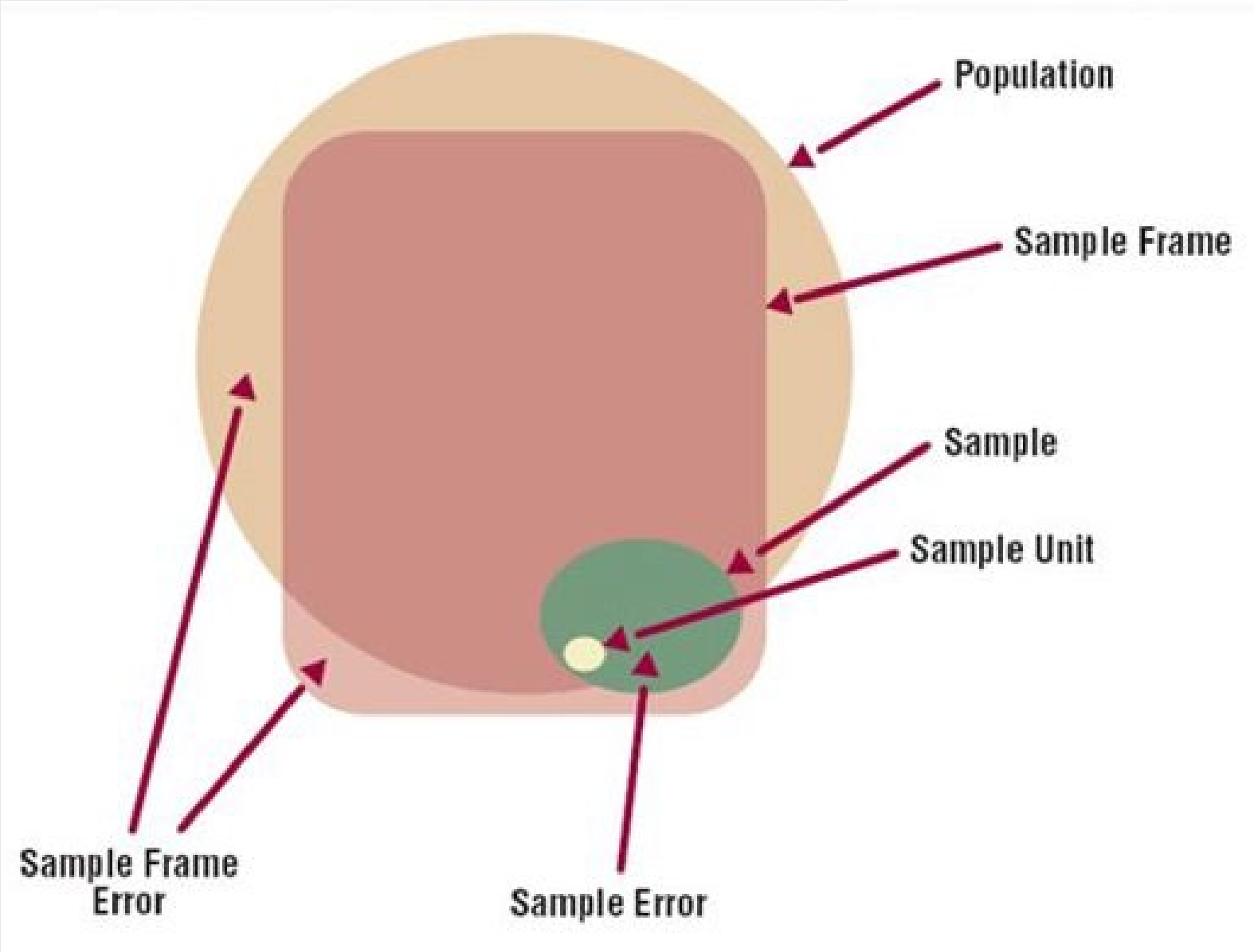
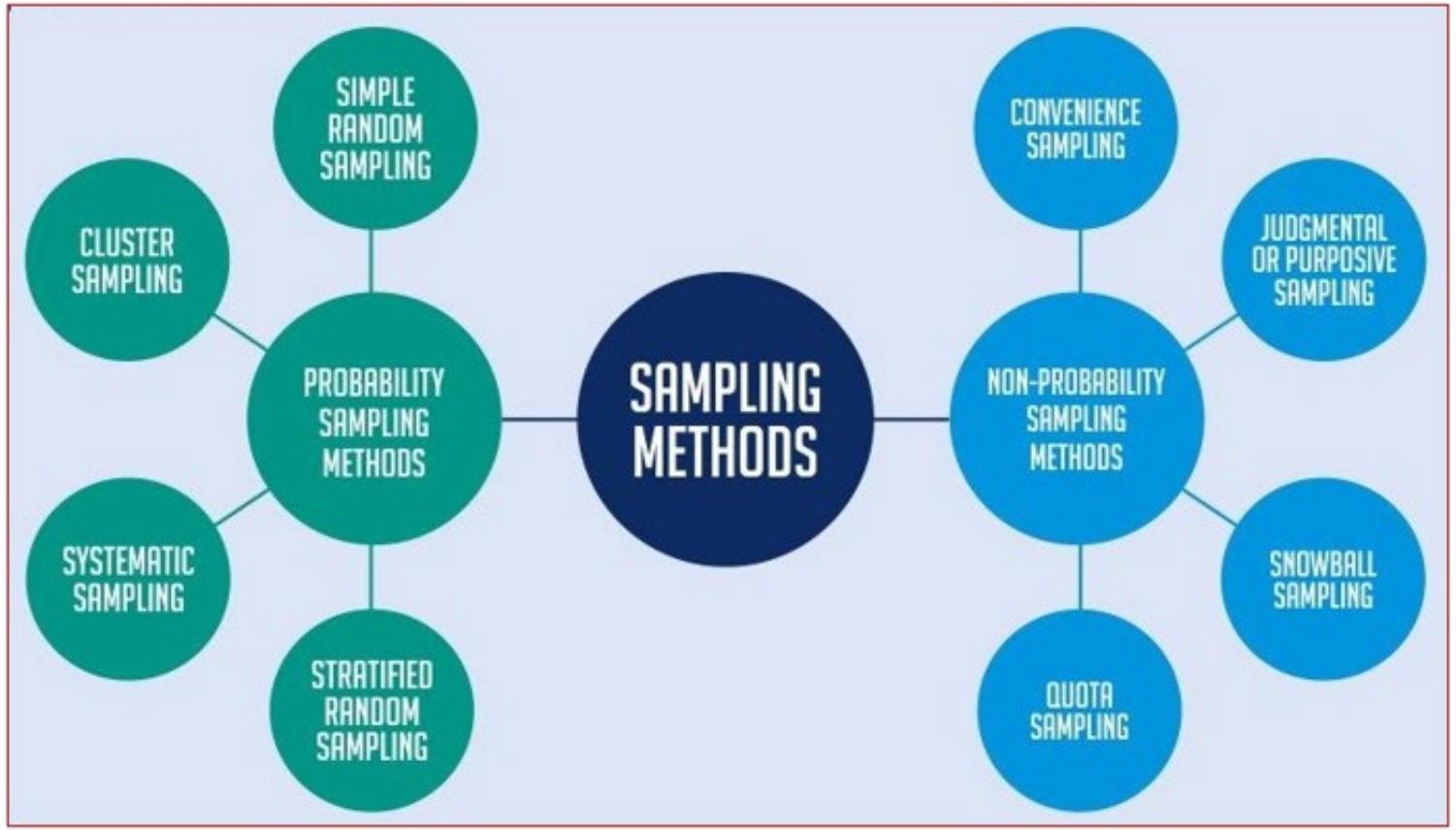
# Sampling

- Population
- Census
- Sampling frame
- Sampling frame error
- Sample unit
- Sample element
- Sample error



# Sampling


SAMPLING METHODS
PROBABILITY SAMPLING METHODS
SIMPLE RANDOM SAMPLING
CLUSTER SAMPLING
SYSTEMATIC SAMPLING
STRATIFIED RANDOM SAMPLING
NON-PROBABILITY SAMPLING METHODS
CONVENIENCE SAMPLING
JUDGMENTAL OR PURPOSIVE SAMPLING
SNOWBALL SAMPLING
QUOTA SAMPLING

# Sampling in Qualitative Research

Even if it were possible, it is not necessary to collect data from everyone in a community in order to get valid findings.

In qualitative research, only a sample (that is, a subset) of a population is selected for any given study.

The study's research objectives and the characteristics of the study population (such as size and diversity) determine which and how many people to select. Three of the most common sampling methods used in qualitative research: purposive sampling, quota sampling, and snowball sampling.



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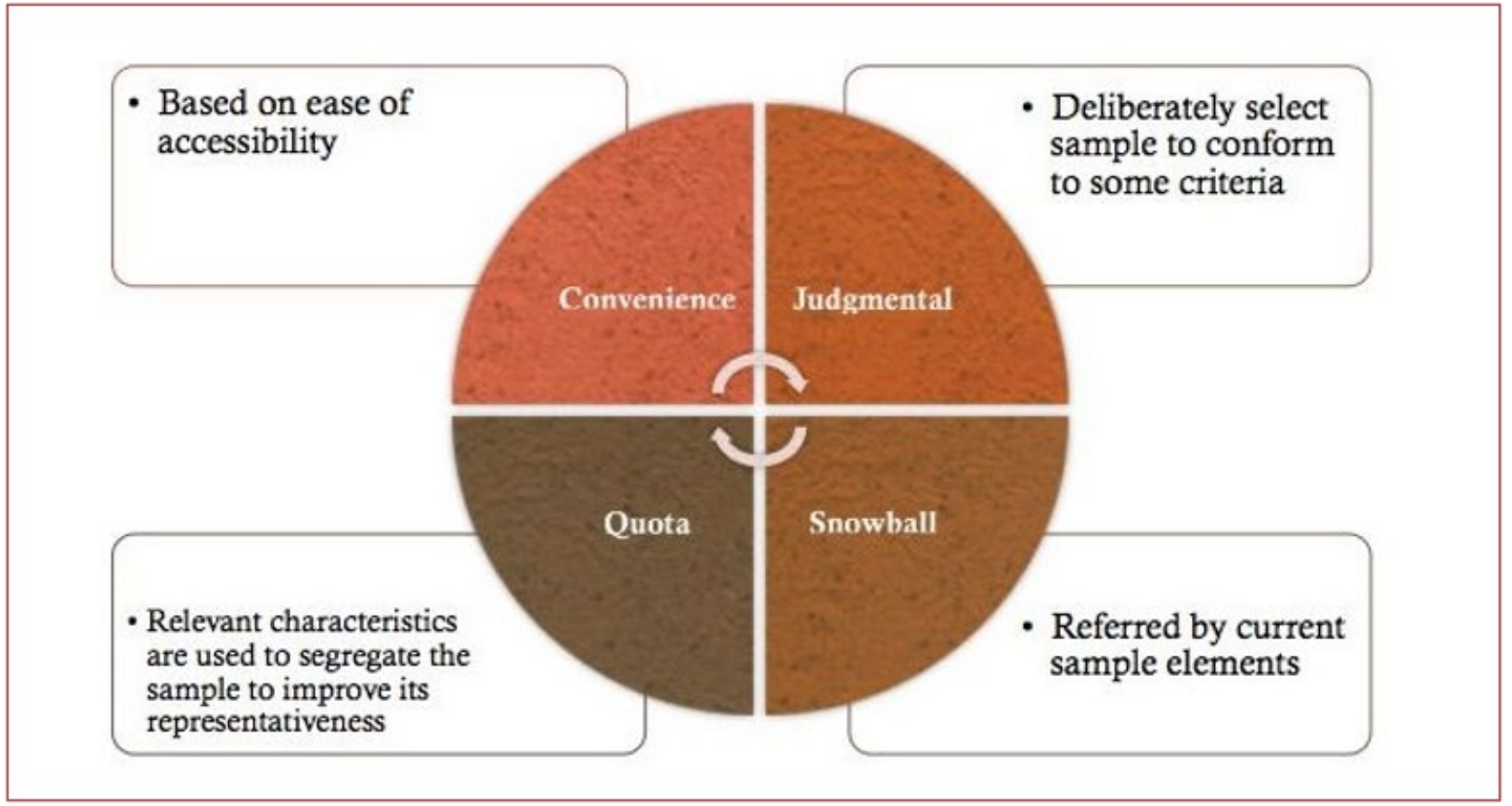
# Non Probability Sampling



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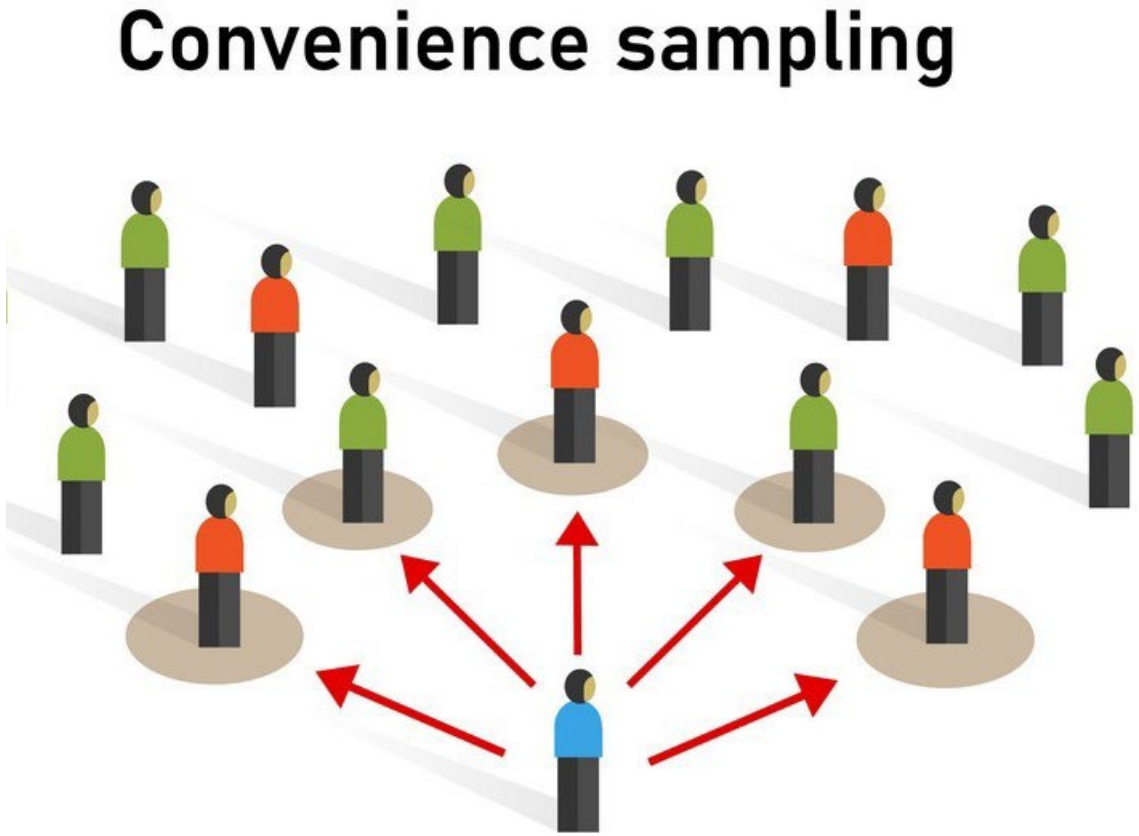
# Non-probability
# Convenience Sampling

Subjects are selected because of their **convenient accessibility and proximity to the researcher.** Participants are selected because they happen to be in the right place at the right time (friends, family, colleagues, students, street interviews, radio or TV listeners, tear-out questionnaires...).

It is the **least expensive** and time consuming.

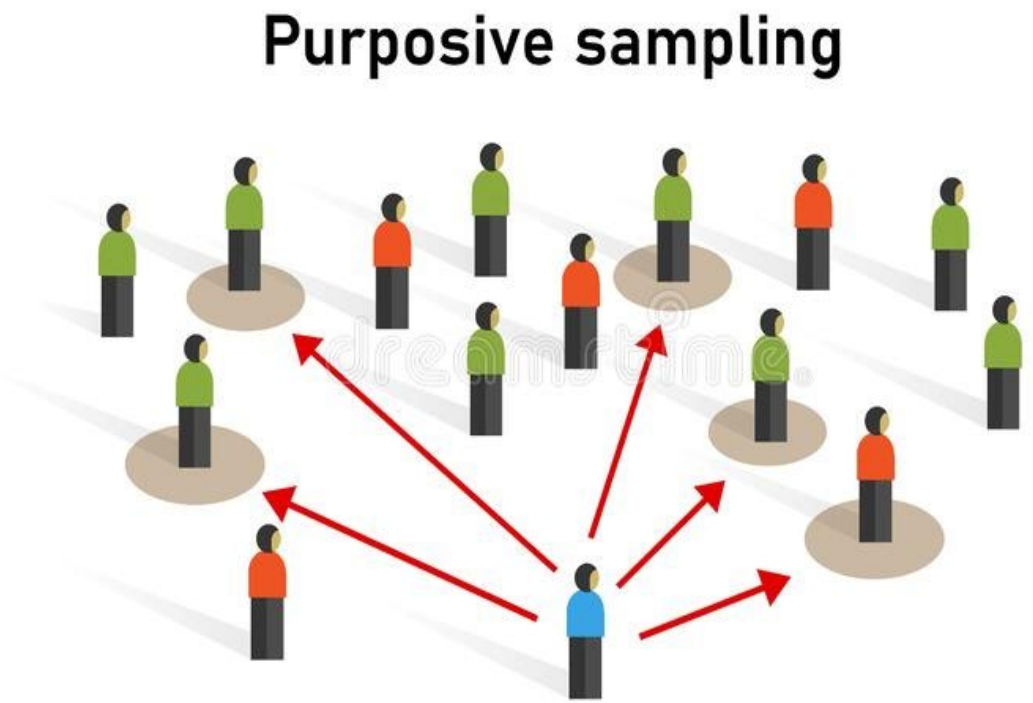



Not recommended for causal or descriptive research, **only for exploratory research**

(generating ideas, creating hypothesis).

# Non-probability
# Judgemental or Purposive Sampling

The population elements are **purposely selected based on the judgement** of the researcher.
The researcher chooses the elements of the sample he/she believes they are representative of the population of interest (often used in B2B - test markets selected for a new product, boutiques or flagship stores for a new merchandising display system, product testing with highly demanding customers).




It is relatively **inexpensive and fast**, **but subjective**, depends on the judgement of the researcher.

# Bias

Bias /ˈbʌɪəs/ - *noun*

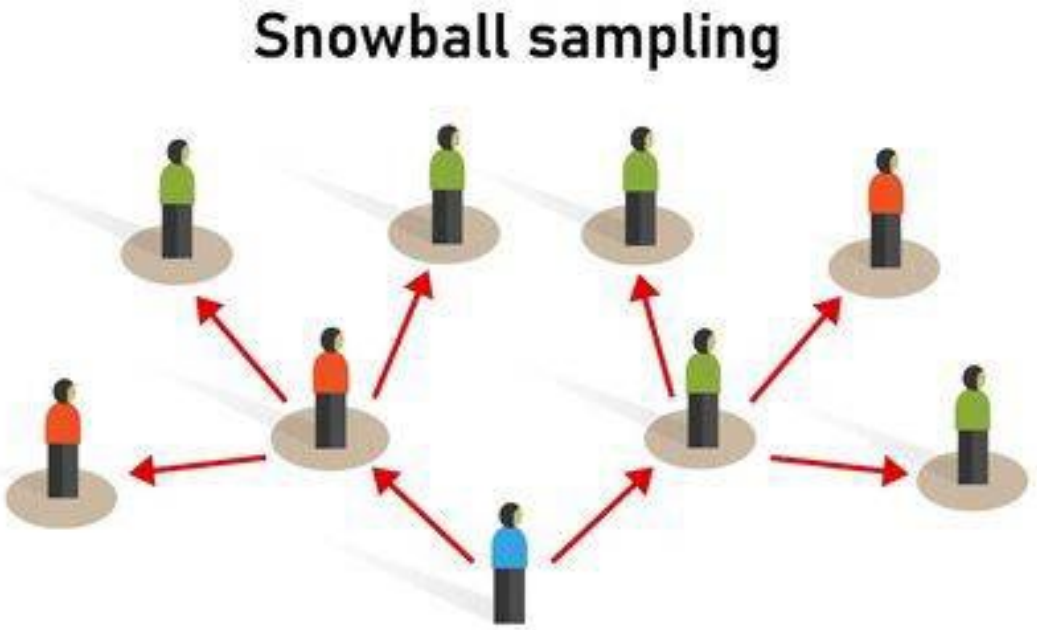
Inclination or prejudice for or against one person or group, especially in a way considered to be unfair.

"there was evidence of **bias against** foreign applicants"
Similar:

Prejudice
Partiality
Partisanship
Favouritism
Unfairness

# Non-probability
# Snowball Sampling

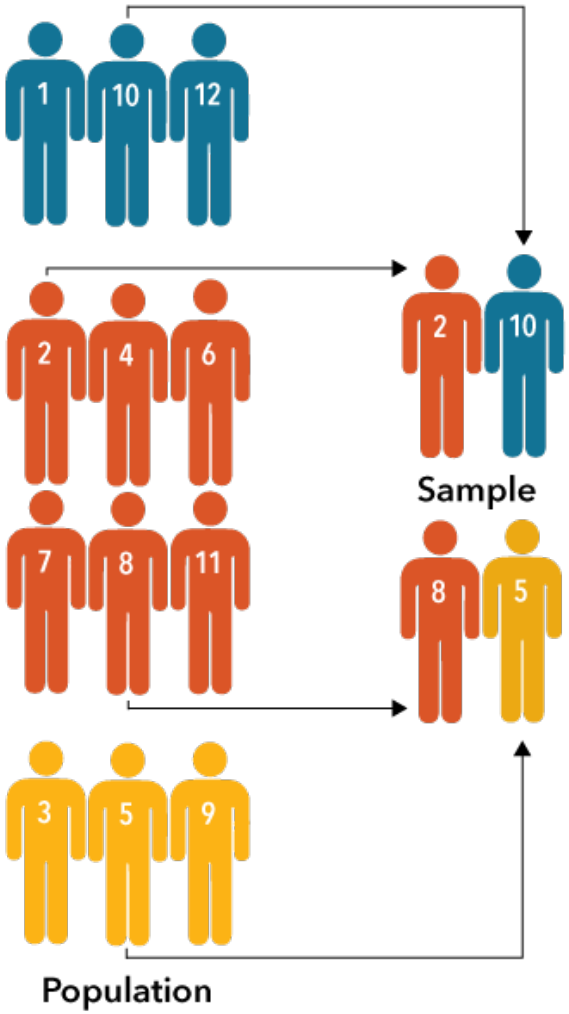
An **initial group** of participants is **selected randomly** or targeted at a few individuals who are known to possess the desired characteristics of the target population. After being interviewed, these participants are asked to **identify others** who also belong to the target population of interest. **Subsequent participants are selected based on the referrals**.




This process may be carried out in **waves**, thus leading to a **snowballing effect** (users of particular social services, e.g. parents who use nurseries or child carers whose names cannot be revealed,  widowed males under 35).

# Non-probability
# Quota Sampling

It is a **two-stage restricted judgemental sampling**.
**The first stage** consists of **developing control categories or quotas** that ensure the composition of the sample is the same as the composition of the population (**mirroring**).
In **the second stage**, **sample elements are selected** based on **convenience** or **judgement**.




Because the elements within each quota are selected based on convenience or judgement, many sources of **selection bias are potentially present**.

# Consent in Qualitative Research

In general, data collection activities that require more than casual interaction with a person require individual informed consent from that person. Examples of such activities include in-depth interviews and focus groups.

**Individual informed consent may be written or oral.**



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# Consent in Qualitative Research

The person should be told:

• the purpose of the research

• what is expected of a research participant, including the amount of time likely to be required for participation

• expected risks and benefits, including psychological and social (if there are any)

• the fact that participation is voluntary and that one can withdraw at any time with no negative repercussions

• how confidentiality will be protected

• the name and contact information of the local lead investigator to be contacted for questions or problems related to the research

• the name and contact information of an appropriate person to contact with questions about one's rights as a research participant (who is overseeing the research)



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# Model for Confidentiality

“You know, I always promise to keep what people tell me confidential, so I can’t tell you who else I have seen or what anyone has said. This also means that I will not be able to tell anyone that you and I had this interview, nor will I talk to anyone about what you tell me today.”



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# Interviewing

Interview participants thoroughly

- Obtain informed consent from each participant before the interview.
- Address all questions or topics listed in the interview guide.
- Brainstorm about questions participants could ask and think about how you would answer them.
- Ask follow-up questions (some of which may be scripted in the interview guide) in order to elicit participants' complete knowledge and experience related to the research topic.
- Probe participants for elaboration of their responses, with the aim of learning all they can share about the research topic.


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# Documenting Interview

Document the interview

• Record the interview using an audio (and sometimes video) recorder.

• Take backup notes.

• Observe and document participants' behaviors and contextual aspects of the interview as part of your field notes.

• Expand your notes as soon as possible after each interview, preferably within 24 hours, while your memory is still fresh.



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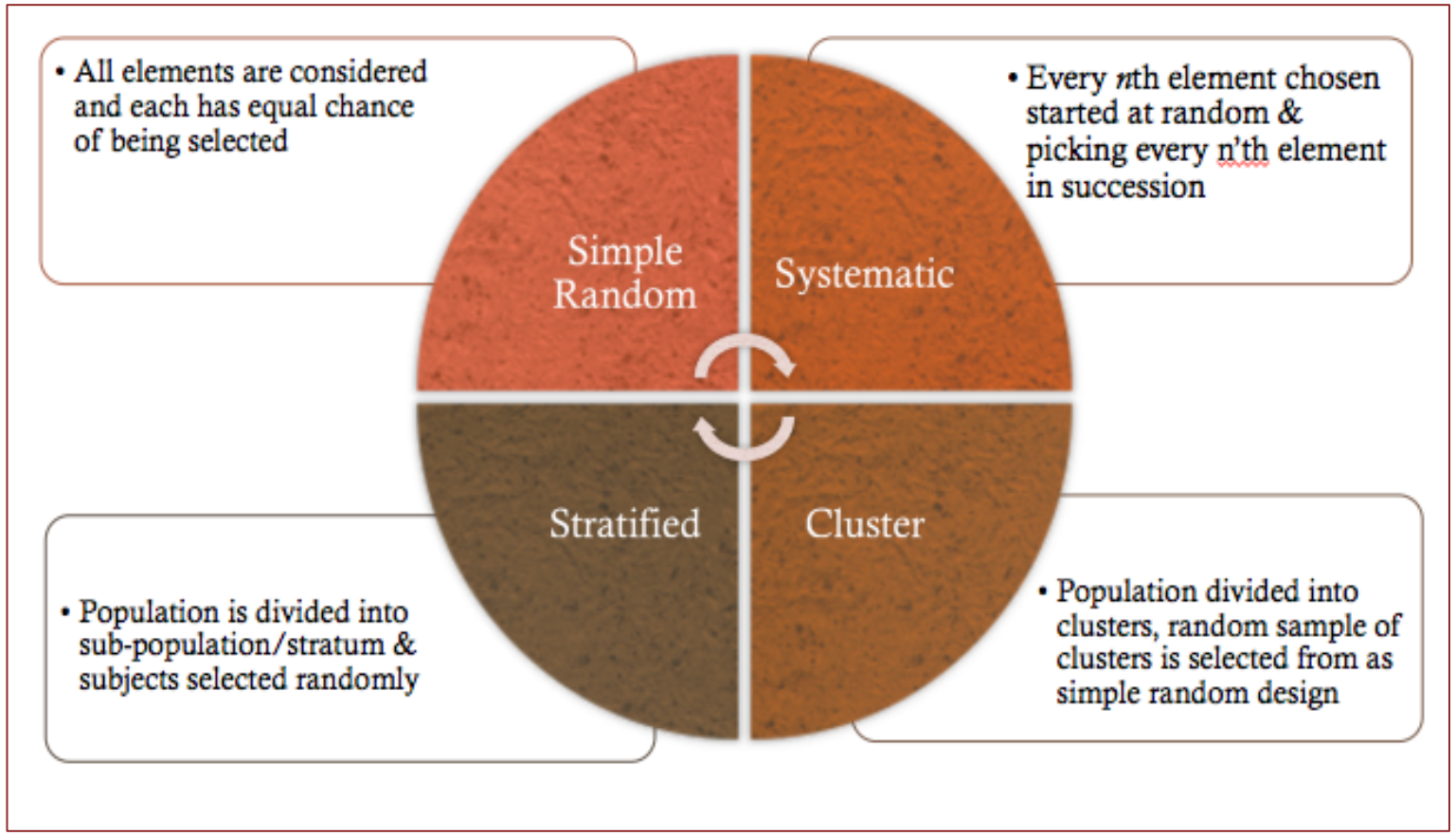
# Probability Sampling

**Sampling efficiency** is a **trade-off** between sampling **cost** and **precision**.

**The greater the precision, the greater the cost**.

The researcher should strive for the **most efficient sampling design**, **subject to the budget allocated**.



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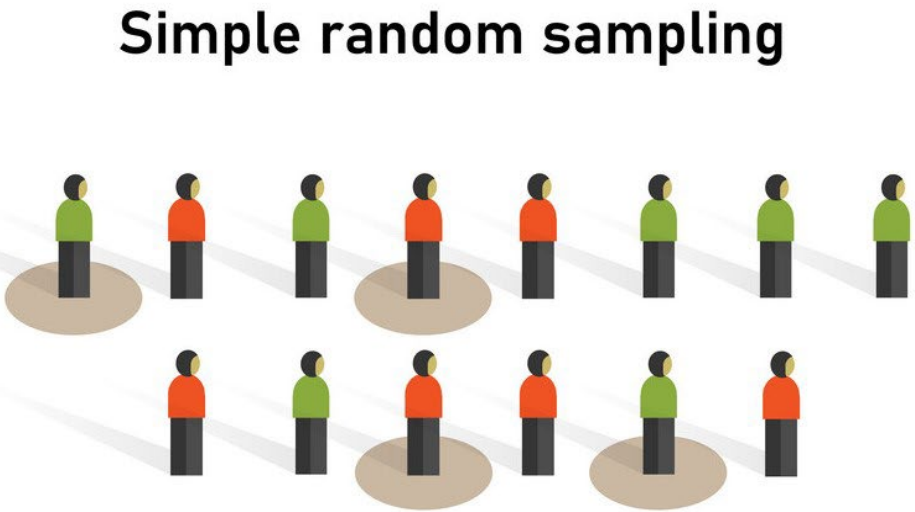
# Probability Sampling Methods
## Simple Random Sampling

**Each element in the population has a known and equal probability of selection.**

The researcher first compiles a **sampling frame** in which **each element is assigned a unique identification number**. Then random numbers are generated to determine which elements to include in the sample.

The random numbers may be generated with a **computer routine** or a table. This method is equivalent to a **lottery system**.



# Simple Random Sampling (SRS)

It is **easily understood** and the sample results may be projected to the target population.

Four significant limitations:

1. **Difficult to construct a sampling frame** that will permit a simple random sample to be drawn.
2. It can result in **very large samples** spread over **large geographical areas**
3. Often results in **lower precision** than other probability sampling techniques.
4. May or may not result in a representative sample (if the size of the sample is small).

For these reasons, SRS is **not widely used** in marketing research.



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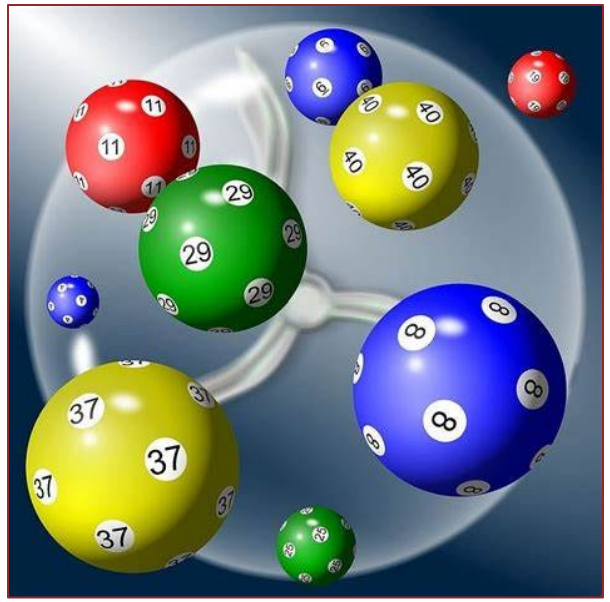
# Simple Random Sampling (SRS)



Formula for simple random sample selection probability:

**Probability of selection = sample size / population size**

Example:
Population 100,000 recent Kindle Buyers
Sample size 1,000 respondents
Probability 1,000/100,000=1/100 1%

Random device method (flipping of a coin, lottery numbers) and random number method.
Random digit dialing (RDD)



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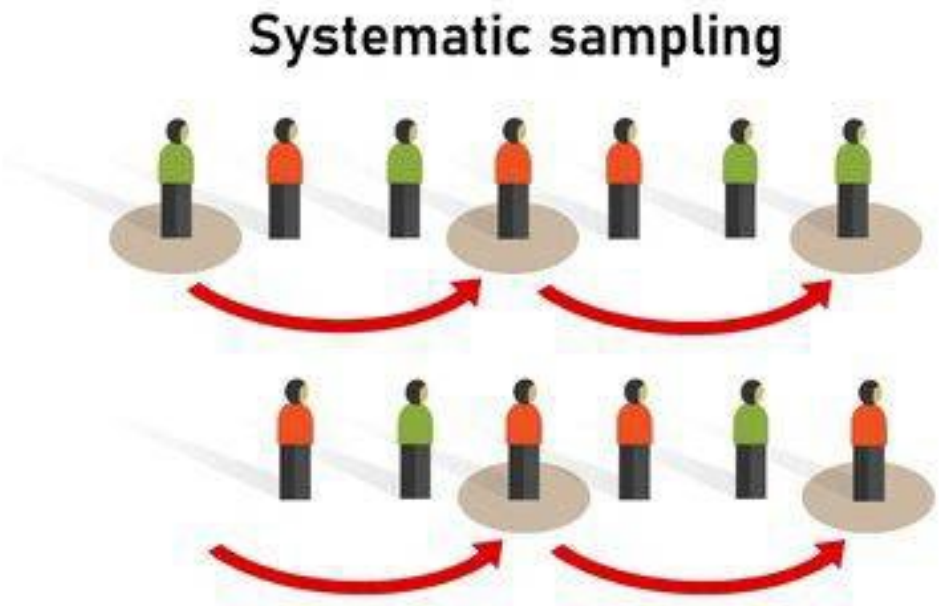
# Probability Sampling Methods
## Systematic Sampling



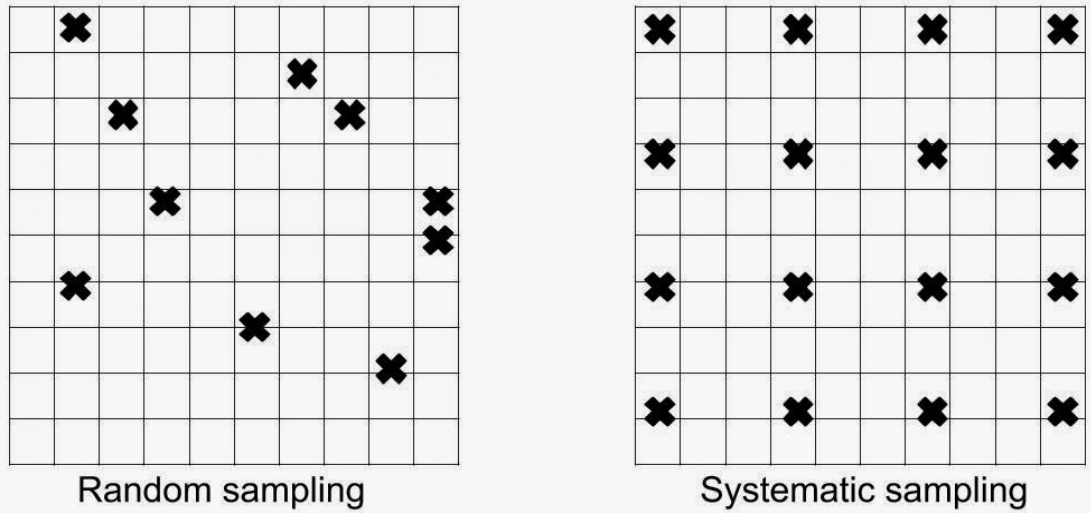

The sample is chosen by **selecting a random starting point and then picking every I-th element** in succession from the sampling frame.

The sampling interval, **i**, is determined by dividing the population size **N** by the sample size **n** and rounding to the nearest whole number.

For example, N=100,000 and sample is n=1,000. In this case, the sampling interval, i, is 100. A random number between 1 and 100 is selected. If, for example, this number is 23, the sample consists of elements 23, 123, 223, 323, 423, 523 and so on.

# Probability Sampling Methods
## Systematic Sampling

For this method a hard-copy listing of a population is necessary (database, address book, etc.). It is **efficient** because it employs a random starting point. It is also **circular**, researcher can go again from the beginning of the list following the skip interval.




**skip (sampling) interval = population list size /sample size**

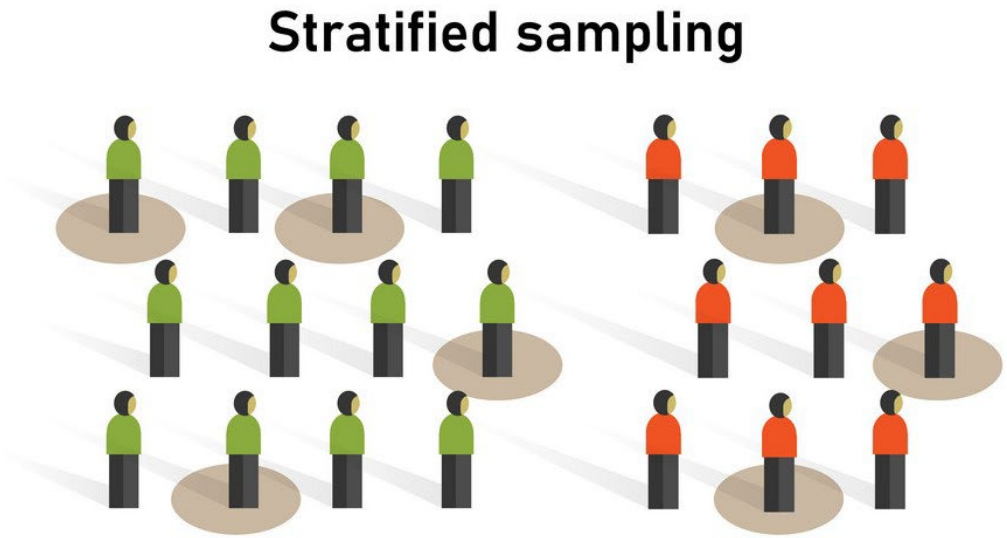
The difference between the simple random sampling and systematic random sampling is in the words systematic and random. The systematic random sampling uses the skip interval, while simple random sampling is used by successive random draws.

# Probability Sampling Methods
## Stratified Random Sampling

Stratified sampling is a **two-step process** in which the population is partitioned into **subpopulations, or strata**.

The strata should be mutually exclusive and collectively exhaustive in that every population element should be assigned to one and only one stratum and no population elements should be omitted.

Next, **elements are selected from each stratum by a random procedure**, usually Simple Random Sampling.



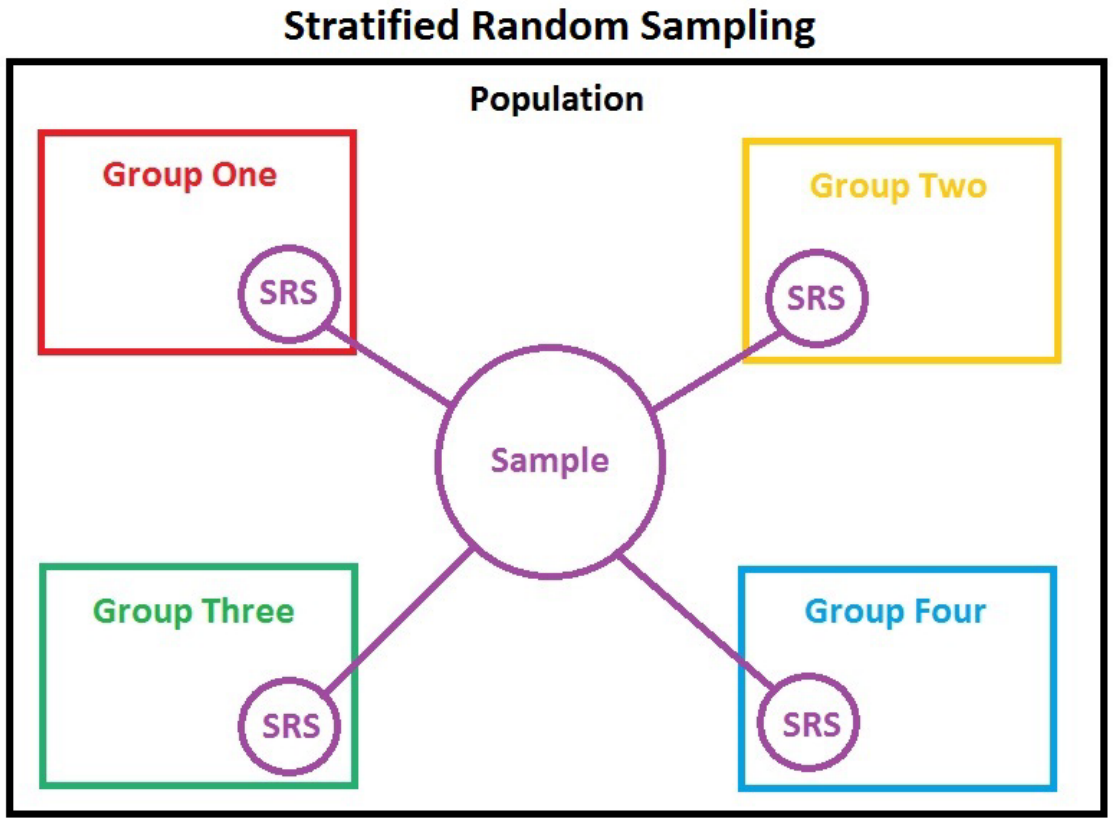

A major objective of stratified sampling is to increase precision without increasing cost.

# Probability Sampling Methods
# Stratified Random Sampling

Area sampling is a form of stratified sampling. The researcher divides population into geographic areas (cities, neighbourhoods, etc.)

There are two options:
One-step area sample
Two step are sample

Disadvantage of cluster sampling is when clusters are not homogeneous (example choosing the most luxurious neighbourhood only).



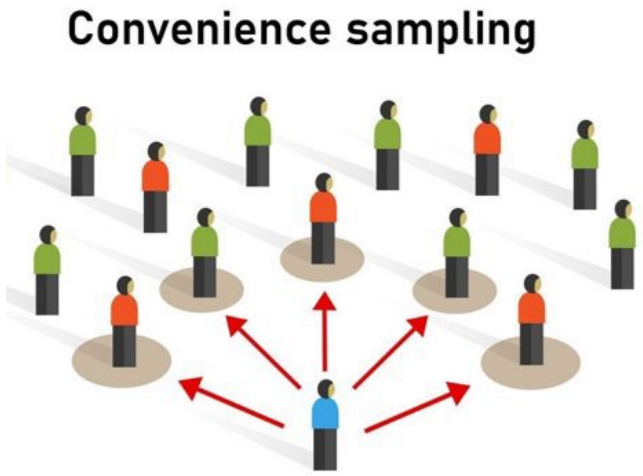
# Probability Sampling Methods
## Cluster Sampling

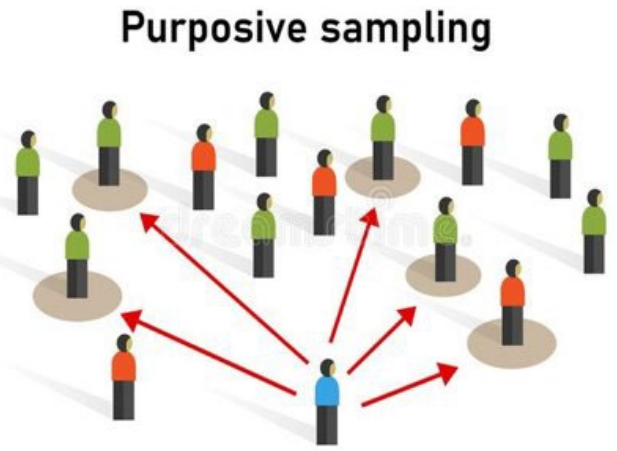
A two-step probability sampling technique where the **target population is first divided** into mutually exclusive and collectively exhaustive **subpopulations called clusters**, and then a random sample of clusters is selected based on a Simple Random Sampling.

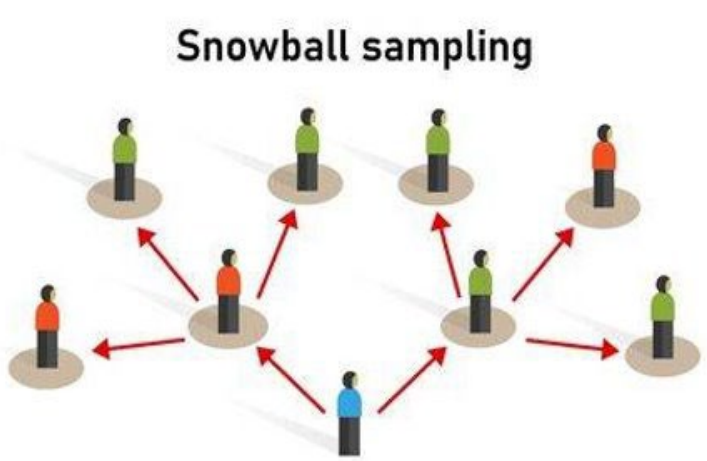
For each selected cluster, either **all the elements are included** in the sample, or a sample of elements is drawn probabilistically.

Stratified Sampling Vs Cluster Sampling

# Sampling – Non-probability



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# Sampling

Sample size decision is a compromise between what is theoretically perfect and what is practicaly feasible. Only a probability sample, typically referred as *random sample* is truly representative of a po pulation.

A typical question: "How large a sample should have to be to be representative?"

**LARGE SAMPLE BIAS – false belief that sample size determines sample representativeness**

- Sample size has nothing to do with sample representativeness, it affects sample **ACCURACY**.
- **Sample accuracy** measures how closely it reports the true values of the population it represents.
- **Sample representativeness** is determined not by size, but by the sample selection method.



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# Reliable and Valid

**Reliable measures** obtain **identical or very similar responses** from the same respondent.

If a question obtains a very different answer from the same respondent,
knowing that the respondend is unchanged between administrations–it is unrelieable.

Valid mesures are truthful. **Validity** is the **truthfulness of resposes**.



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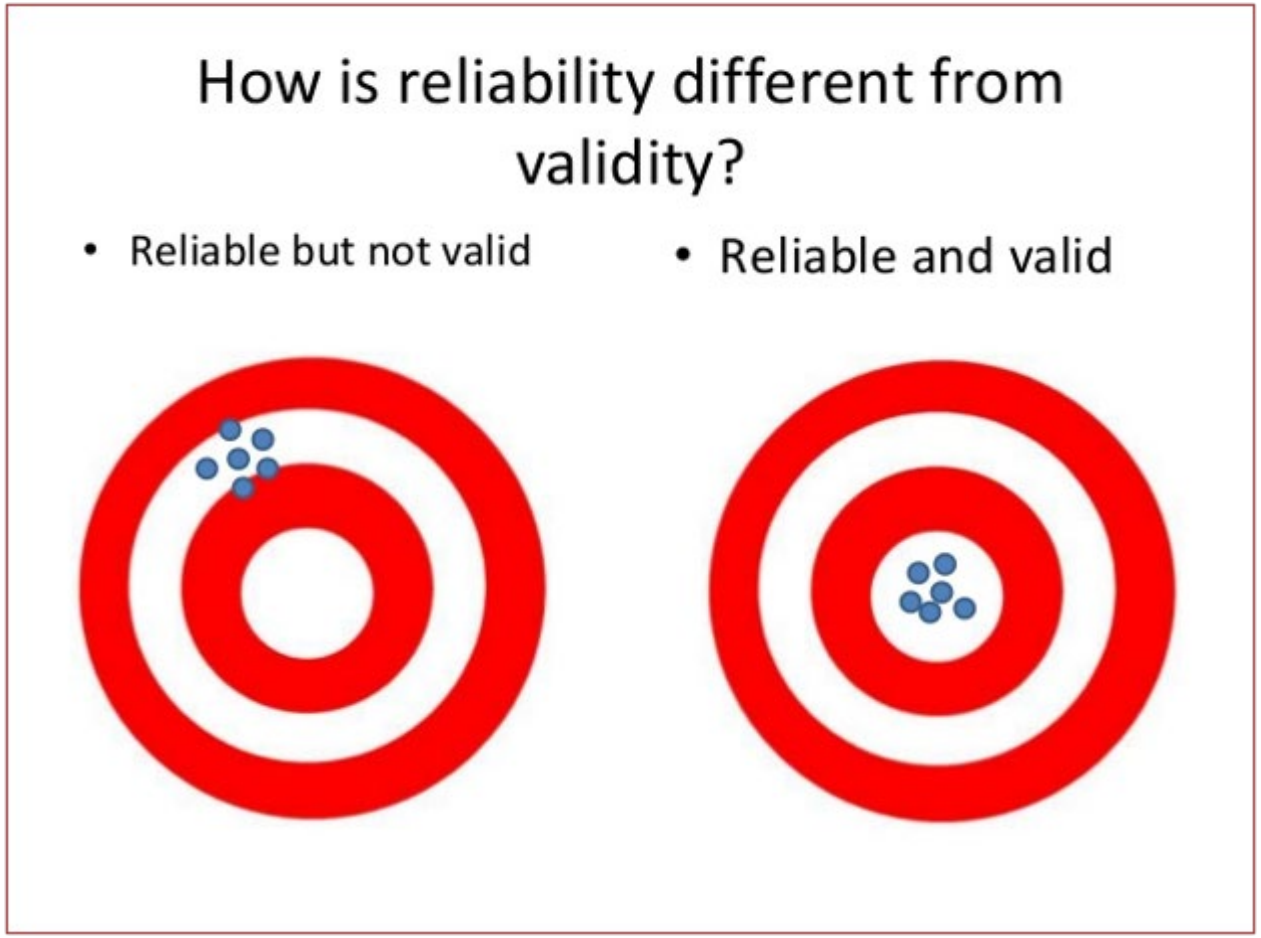
# Reliable and Valid



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# Reliable and Valid




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# Errors

**"The only perfectly accurate sample is census."**

Two types of errors:

1. **Nonsampling error** – all types of errors other than sample method and sample size.
- Problem specification
- Question bias
- Data recording
- Incorrect analysis

2. **Sampling error** – incluldes **sample method error** and **sample size error**.
- In census all members of a population are involved, so there is no sample error.

"**A random sample will always have some inaccuracy, which is referred to as sample error.**"



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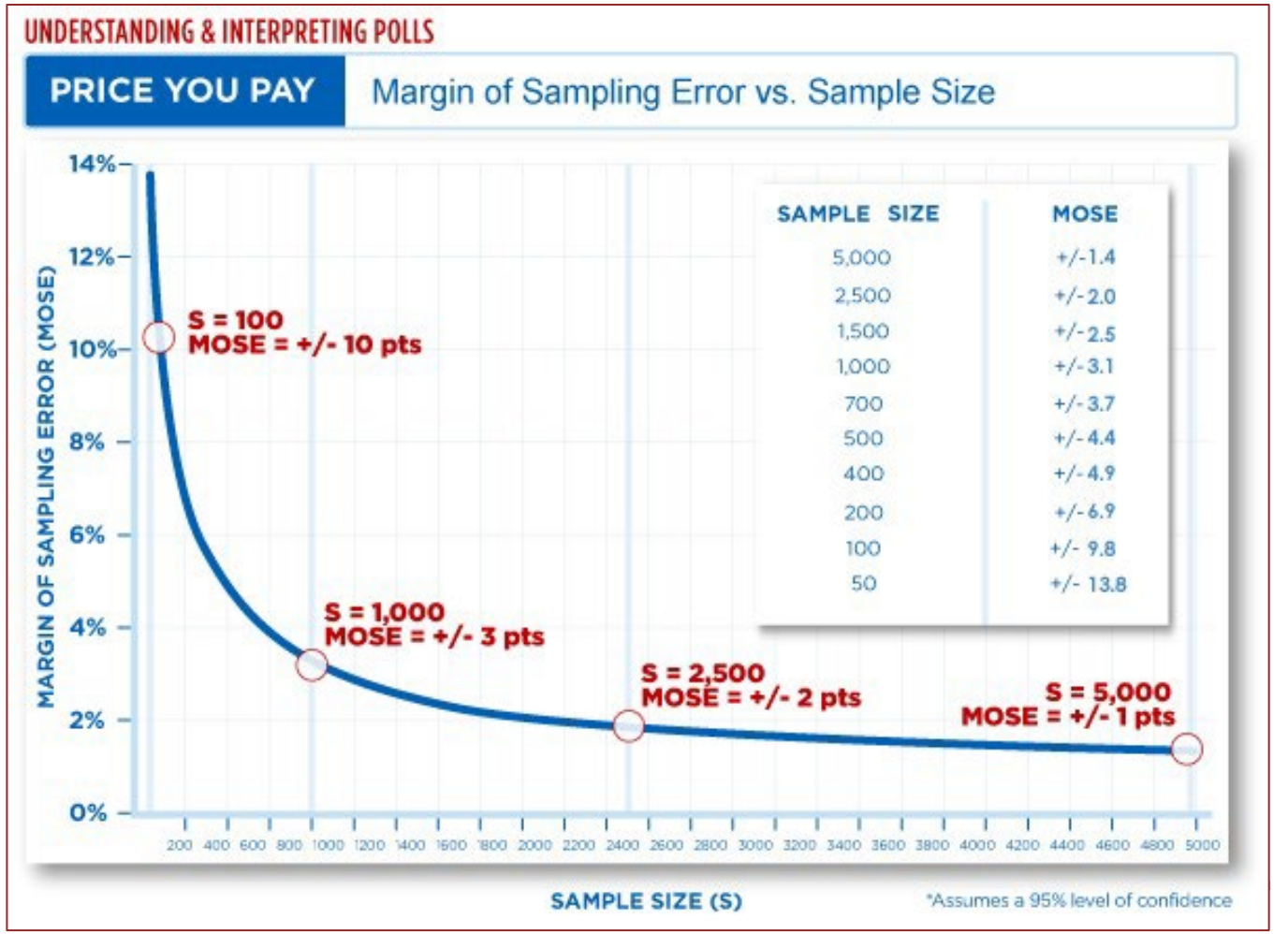
# The Relationship Between the Sample Size and Error

**"The larger a random sample** is, **the more accurate** it is (less sample error)."





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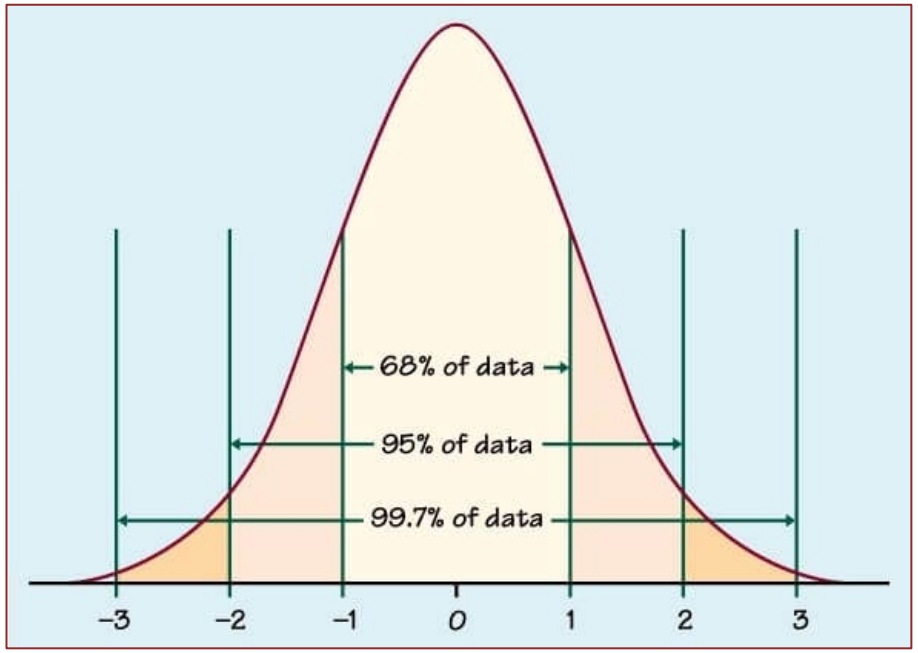
# Level of Confidence and Confidence Interval

**"Take any finding in the survey, replicate the survey with a random sample of the same size and be very likely to find the same findings within +-%range of the original finding."**

The confidence interval allow the researcher to predict what would be found if a survey were replicated many times.



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# Level of Confidence and Confidence Interval

The **confidence level** tells you how sure you can be.

It is expressed as a percentage and represents how often the true percentage of the population who would p ick an answer lies within the confidence interval.

The 95% confidence level means you can be 95% certain;
The 99% confidence level means you can be 99% certain.

Most researchers use the 95% confidence level.



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# Level of Confidence and Confidence Interval

The **confidence interval** (also called margin of error) is the plus-or-minus figure usually reported in newspaper or television opinion poll results.

For example, if you use a confidence interval of 4 and 47% percent of your sample picks an answer you can be "sure" that if you had asked the question of the entire relevant population between 43% (47-4) and 51% (47+4) would have picked that answer.

**Calculator**

https://www.surveysystem.com/sscalc.htm#one



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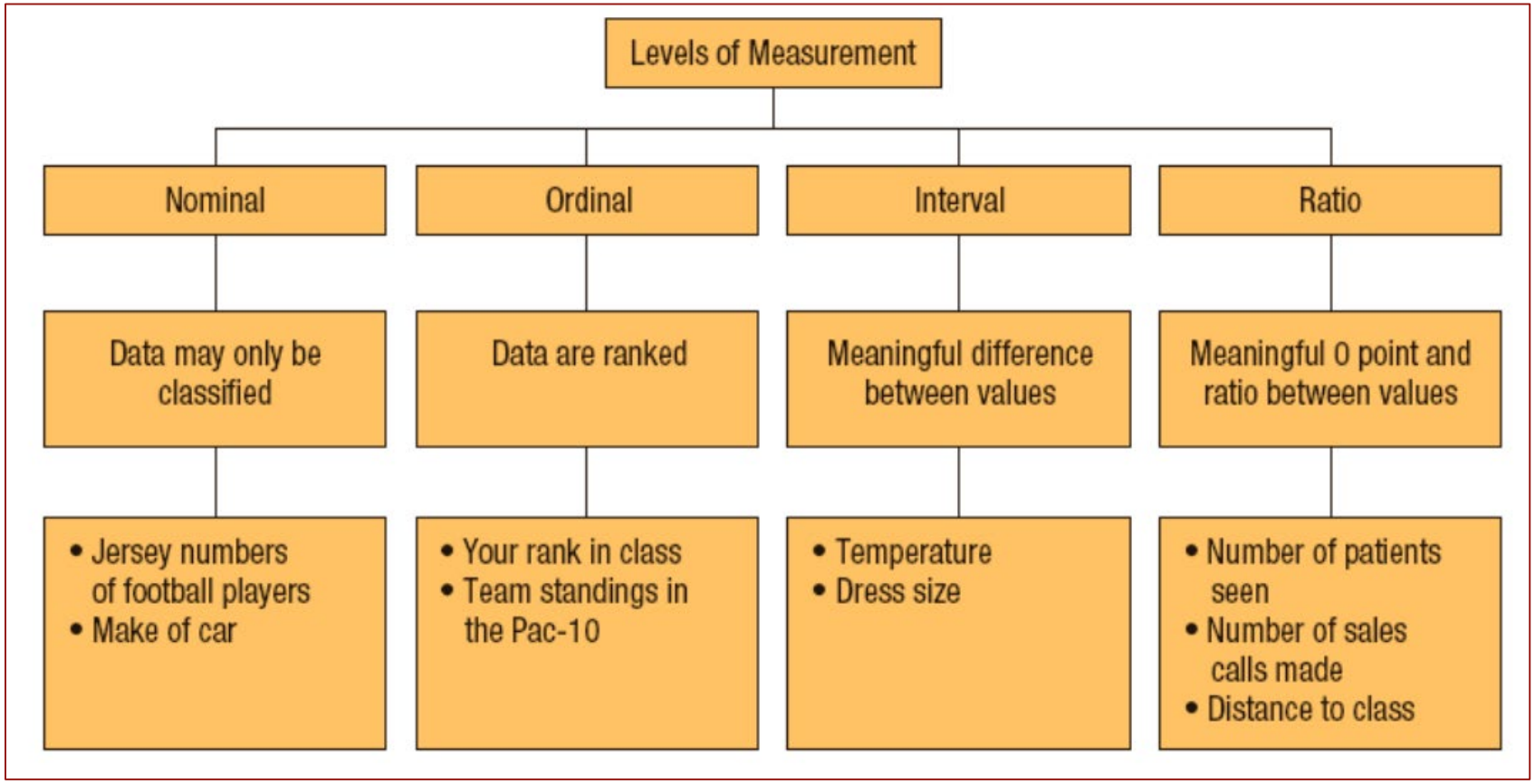
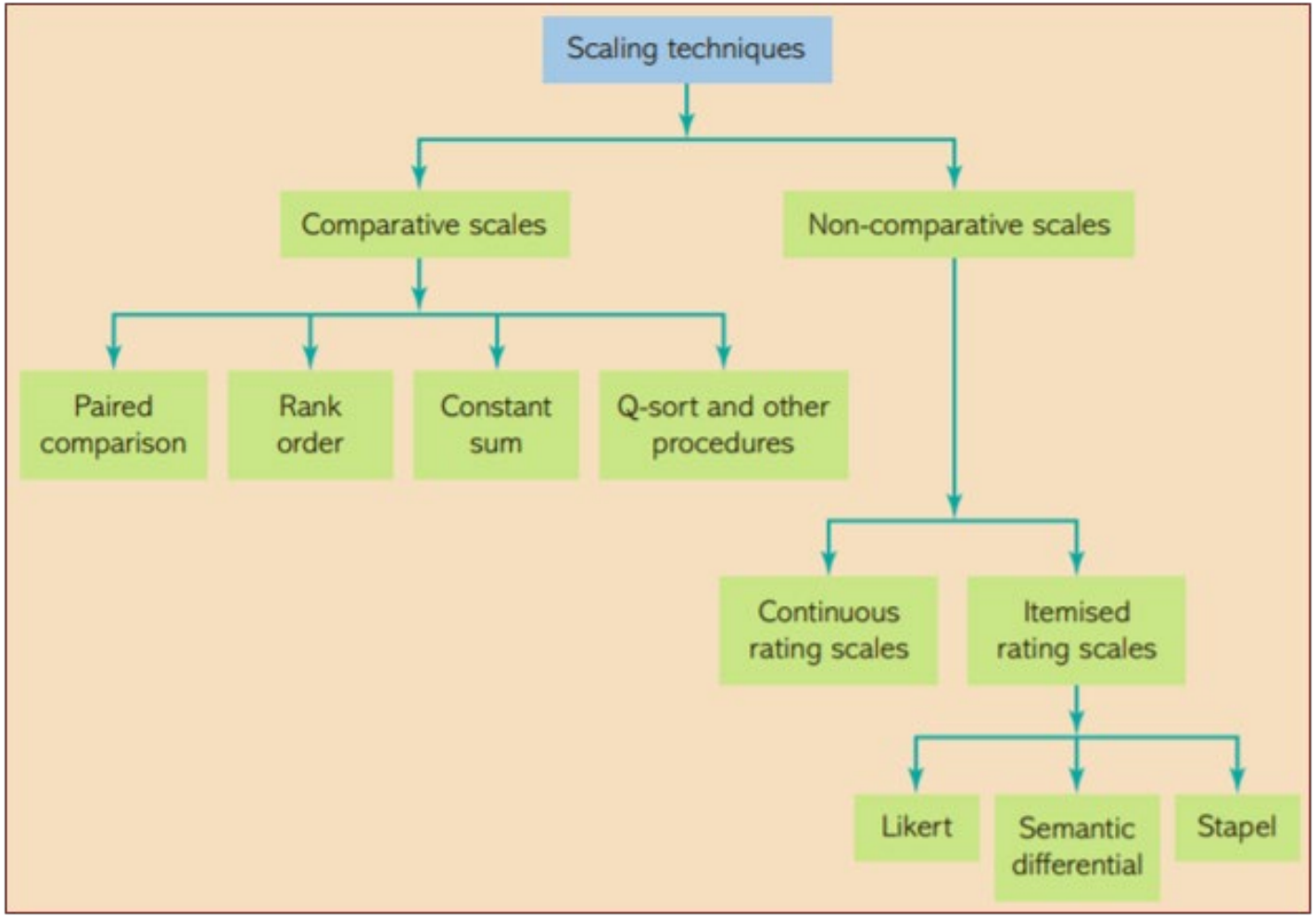
# Measuring

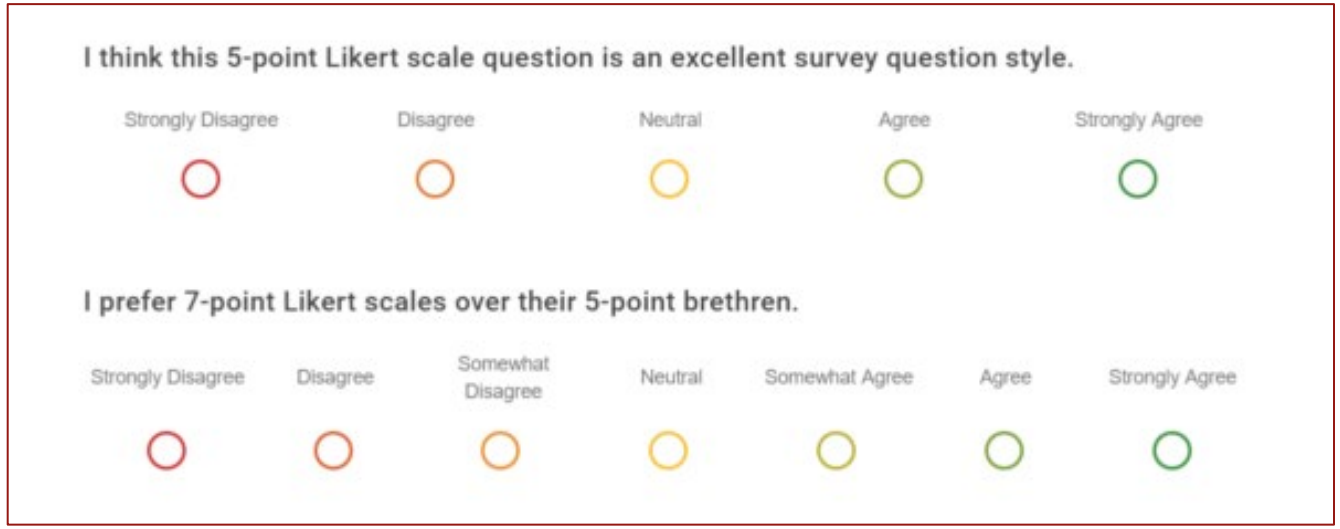

Levels of Measurement
Nominal
Ordinal
Interval
Ratio
Data may only be classified
Data are ranked
Meaningful difference between values
Meaningful 0 point and ratio between values
• Jersey numbers of football players
• Make of car
• Your rank in class
• Team standings in the Pac-10
• Temperature
• Dress size
• Number of patients seen
• Number of sales calls made
• Distance to class

# Scaling


Scaling techniques
Comparative scales
Non-comparative scales
Paired comparison
Rank order
Constant sum
Q-sort and other procedures
Continuous rating scales
Itemised rating scales
Likert
Semantic differential
Stapel

# Likert Scales

- Very commonly used in market research.
- Measures **intensity** of **agreement or disagreement** with a statement.
- It is a **symmetrical** agree-disagree scale.
- American psychologist **Rensis Likert** was a father of the scale.
- Measures **how respondents behave and think**.




- **Dilemma - offer even (4,6)** or **odd (5,7)** number of response options?
- What do you obtain when not offering a middle point? **Respondents must position themselves**.

# Useful Likert Scales

**Level of Acceptability**
- 1 – Totally unacceptable
- 2 – Unacceptable
- 3 – Slightly unacceptable
- 4 – Neutral
- 5 – Slightly acceptable
- 6 – Acceptable
- 7 – Perfectly Acceptable

**Level of Appropriateness**
- 1 – Absolutely inappropriate
- 2 – Inappropriate
- 3 – Slightly inappropriate
- 4 – Neutral
- 5 – Slightly appropriate
- 6 – Appropriate
- 7 – Absolutely appropriate

**Level of Importance**
- 1 – Not at all important
- 2 – Low importance
- 3 – Slightly important
- 4 – Neutral
- 5 – Moderately important
- 6 – Very important
- 7 – Extremely important

**My beliefs**
- 1 – Very untrue of what I believe
- 2 – Untrue of what I believe
- 3 – Somewhat untrue of what I believe
- 4 – Neutral
- 5 – Somewhat true of what I believe
- 6 – True of what I believe
- 7 – Very true of what I believe

**Priority:**
- 1 – Not a priority
- 2 – Low priority
- 3 – Somewhat priority
- 4 – Neutral
- 5 – Moderate Priority
- 6 – High priority
- 7 – Essential priority

**Level of Concern**
- 1 – not at all concerned
- 2 – Slightly concerned
- 3 – Somewhat concerned
- 4 – Moderately concerned
- 5 – Extremely concerned

**Level of Support/Opposition**
- 1 – Strongly oppose
- 2 – Somewhat oppose
- 3 – neutral
- 4 – Somewhat favor
- 5 – Strongly favor

**Level of Probability**
- 1 – Not probable
- 2 – Somewhat improbable
- 3 – Neutral
- 4 – Somewhat probable
- 5 – Very probable

**Level of Agreement**
- 1 – Strongly disagree
- 2 – Disagree
- 3 – Neither agree or disagree
- 4 – Agree
- 5 – Strongly agree

**Level of Desirability**
- 1 – Very undesirable
- 2 – Undesirable
- 3 – neutral
- 4 – Desirable
- 5 – Very desirable

# Useful Likert Scales

**Level of Agreement**
- 1 – Strongly disagree
- 2 – Disagree
- 3 – Somewhat disagree
- 4 – Neither agree or disagree
- 5 – Somewhat agree
- 6 – Agree
- 7 – Strongly agree

**Knowledge of Action**
- 1 – Never true
- 2 – Rarely true
- 3 – Sometimes but infrequently true
- 4 – Neutral
- 5 – Sometimes true
- 6 – Usually true
- 7 – Always true

**Reflect Me?**
- 1 – Very untrue of me
- 2 – Untrue of me
- 3 – Somewhat untrue of me
- 4 – Neutral
- 5 – Somewhat true of me
- 6 – True of me
- 7 – Very true of me

**Priority Level**
- 1 – Not a priority
- 2 – Low priority
- 3 – Medium priority
- 4 – High priority
- 5 – Essential

**Level of Problem**
- 1 – Not at all a problem
- 2 – Minor problem
- 3 – Moderate problem
- 4 – Serious problem

**Affect on X**
- 1 – No affect
- 2 – Minor affect
- 3 – Neutral
- 4 – Moderate affect
- 5 – Major affect

**Level of Consideration**
- 1 – Would not consider
- 2 – Might or might not consider
- 3 – Definitely consider

**Level of Participation**
- 1 – No, and not considered
- 2 – No, but considered
- 3 – Yes

**Frequency – 5 point**
- 1 – Never
- 2 – Rarely
- 3 – Sometimes
- 4 – Often
- 5 – Always

**Frequency**
- 1 – Never
- 2 – Rarely
- 3 – Occasionally
- 4 – A moderate amount
- 5 – A great deal

**Frequency of Use**
- 1 – Never
- 2 – Almost never
- 3 – Occasionally/Sometimes
- 4 – Almost every time
- 5 – Every time

# Paired Comparison Scaling

You can ask a participant to **select one out of two objects** according to some criterion.

Example: Ease of use / Cost

Durability / Aesthetics

The researcher can calculate the **percentage of participants who prefer one stimulus over another**.

| | Ease of use | Maintains temperature | Durable | Cost | Aesthetics | Total |
|---|---|---|---|---|---|---|
| Ease of use | ——— | 1 | 1 | 1 | 1 | |
| Maintains temperature | 0 | ——— | 0 | 0 | 0 | |
| Durable | 0 | 1 | ——— | 1 | 1 | |
| Cost | 0 | 1 | 0 | ——— | | |
| Aesthetics | 0 | 1 | 0 | | ——— | |

1 Row of the more important objective

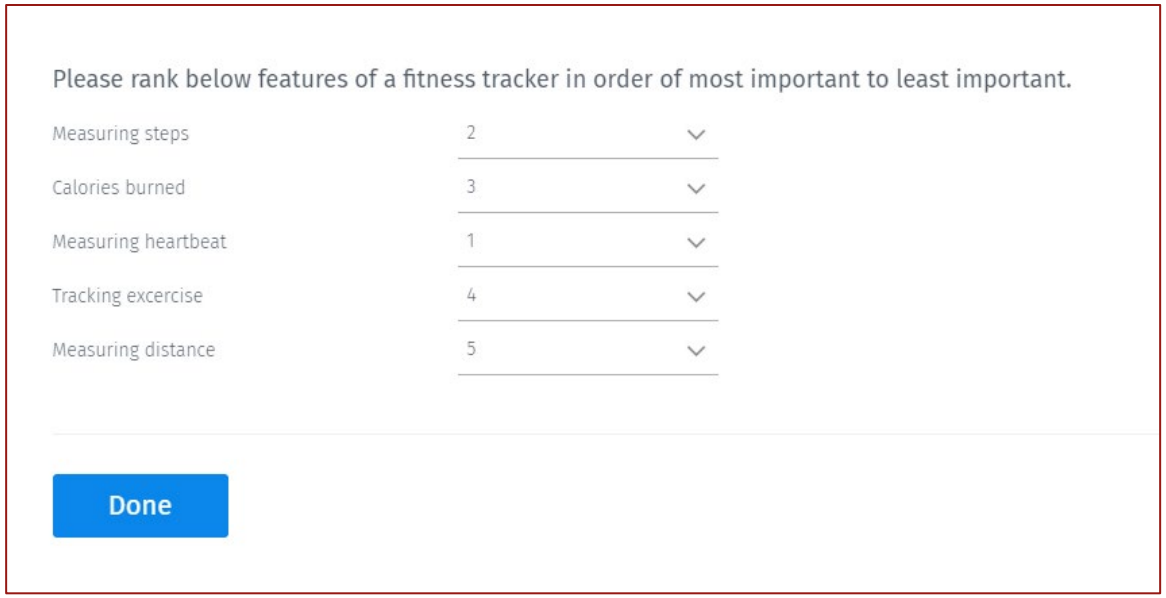
0 Row of the less important objective

# Rank Order Scaling

Participants are presented with **several objects simultaneously** and asked to order or **rank them** according to some criterion.

Participants assign a rank of:

**1** to the most-preferred
**2** to the second-most-preferred
**n** the least preferred




Rank order scaling also results in **ordinal data**.
Compared with paired comparisons, this type of scaling process more **closely resembles the shopping environment**.

It also **takes less time** and eliminates intransitive responses. Participants **easily understand the instructions** for ranking.



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# Constant Sum Scaling

You can ask **participants tp allocate points** (or euros), among a set of stimulus objects with respect to some criterion. Participants may be **asked to allocate 100 points** to attributes in a way that reflects the importance they attach to each attribute. If an attribute is unimportant, the participant assigns it **zero points**. If an attribute is twice as important as some other attribute, it receives twice as many points. The sum of all the points is 100.

Here two examples: scale construction scale and analysis per segments:

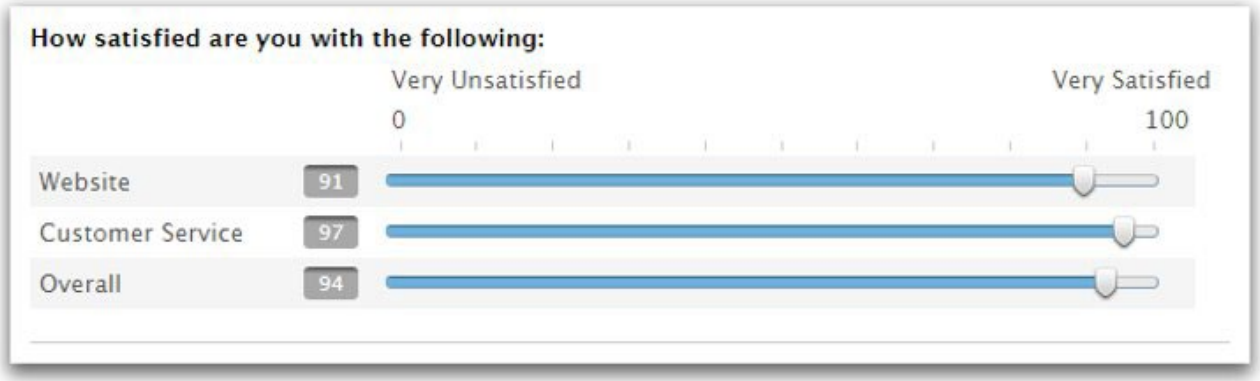
| Attribute | Points |
|---|---|
| Mileage | |
| Seating capacity | |
| Luggage space | |
| Proximity of dealer | |
| Servicing network | |
| **TOTAL** | **100** |

| MEAN POINTS ALLOCATED | | | | |
|---|---|---|---|---|
| | Attribute | Segment I | Segment II | Segment III |
| 1 | Bitterness | 8 | 2 | 17 |
| 2 | Hop flavours | 2 | 4 | 20 |
| 3 | Fragrance | 3 | 9 | 19 |
| 4 | Country where brewed | 9 | 17 | 4 |
| 5 | Price | 53 | 5 | 7 |
| 6 | High alcohol level | 7 | 60 | 9 |
| 7 | Aftertaste | 5 | 0 | 15 |
| 8 | Package design | 13 | 3 | 9 |
| | **Sum** | **100** | **100** | **100** |

Disadvantage: **Participants may allocate more or fewer units** than those specified.
For example, a participant may allocate 108 or 94 points.

# Continuous Rating Scale

In a **continuous rating scale**, also called **graphic rating scale**, participants rate objects by **placing a mark on the continuum** from one extreme of the criterion to another.  Participants are not restricted by the marks previo usly set by the researcher. They are easy to set, but provide little new information.



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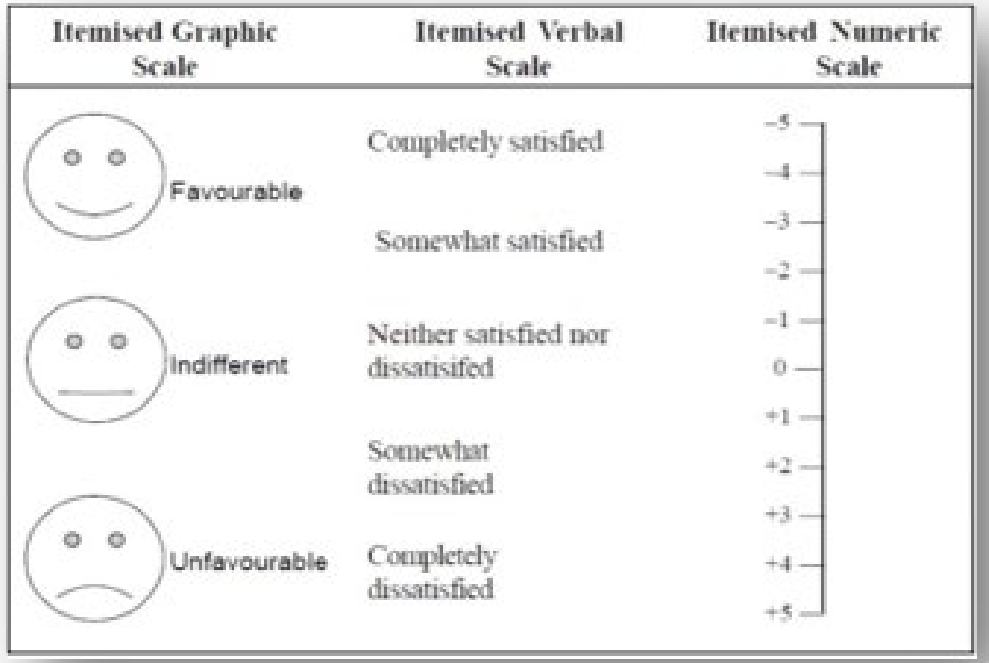
# Itemised Rating Scale

**Itemised rating scale** is a measurement scale having **numbers or brief descriptions** associated with **each category**.

The categories are ordered in terms of **scale position**.
They are **widely used** in marketing research.

The **most commonly used** itemised rating scales:

1. Likert scales
2. Semantic differential scales
3. Stapel scales



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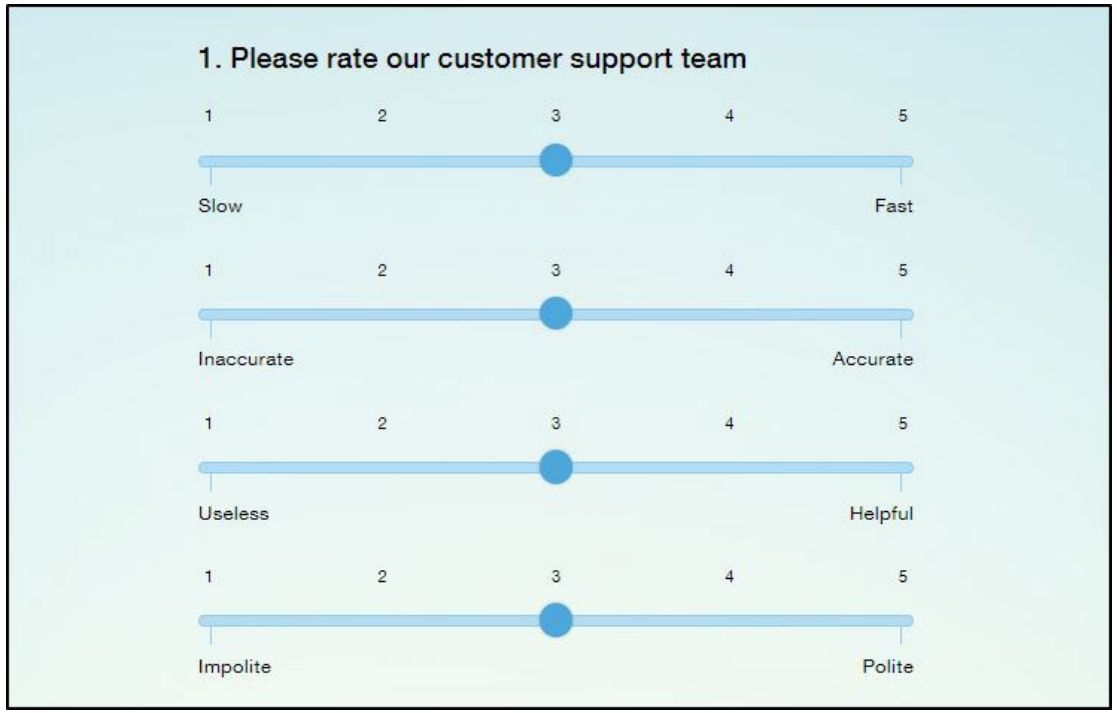
# Semantic Differential Scales

If you opt to construct a semantic differential scale begin with the **determination of a concept** or object to be rated.
Select **bipolar pairs of words or phrases** to **describe the object**.
The opposites are positioned at the endpoints of a **continuum of intensity**.
Commonly 5-7 points are used to separate them.

Examples: Convenient /Inconvenient
High quality / Low quality
Dependable / Independable

Uses: to measure brand perception, store image, etc.



# Basic Data Analysis

For describing and analyzing your data set you might use the basic statistics:

- Measures of position (also referred to as central tendency measures)
- Measures of spread (also referred to as variability measures)
- Measures of shape

With the **measures of position** you can see where the data is centered in your data set.

Despite the common use of an arithmentic mean, you might be using different measures:

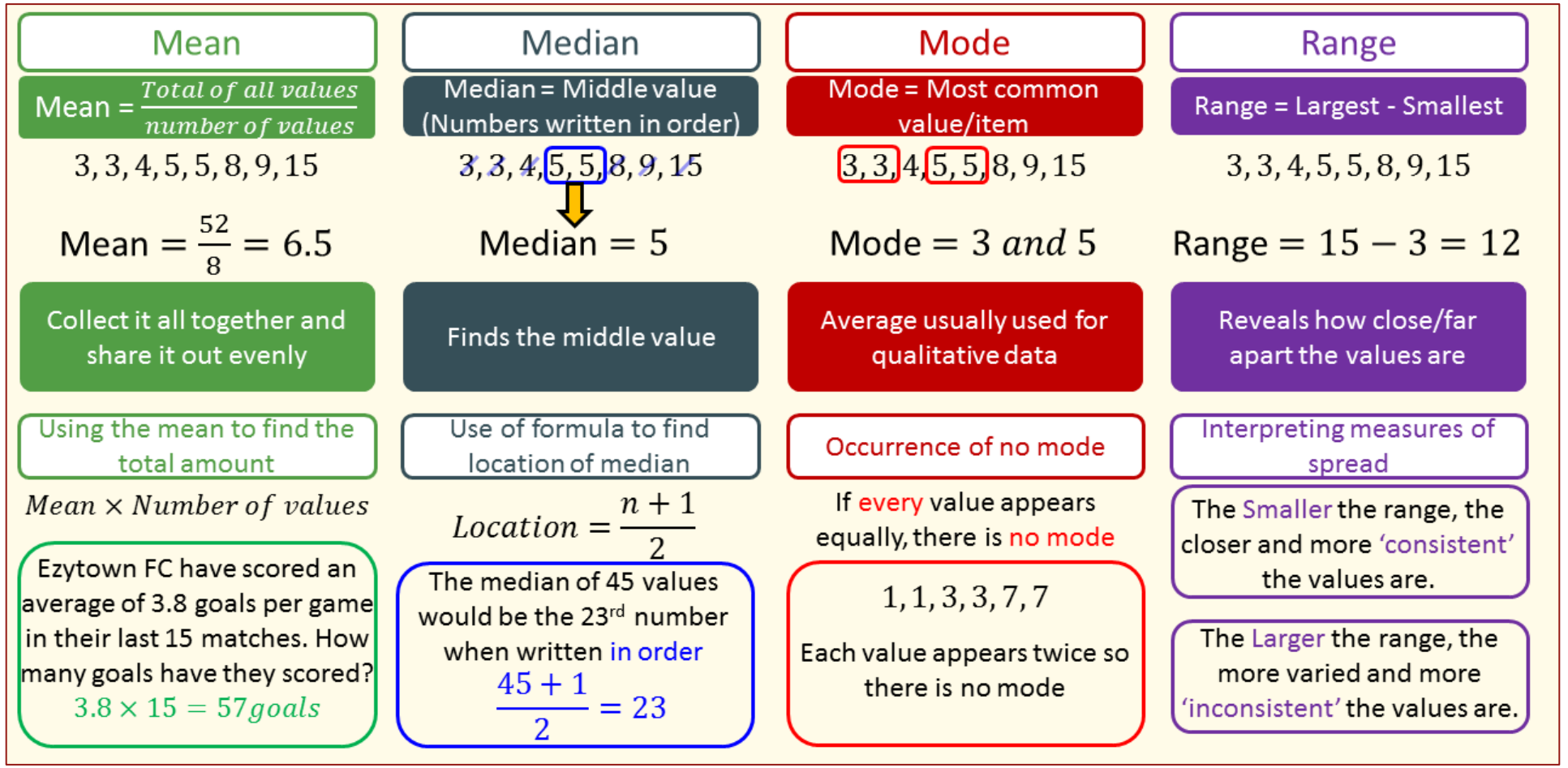
- **Mean** (arithmetic mean)
- **Median**
- **Mode**

**Measures of spread** will give you information how data in your data set variate.

You can use it to determine the indicator of the quality of product/services and as a reference to improve it.

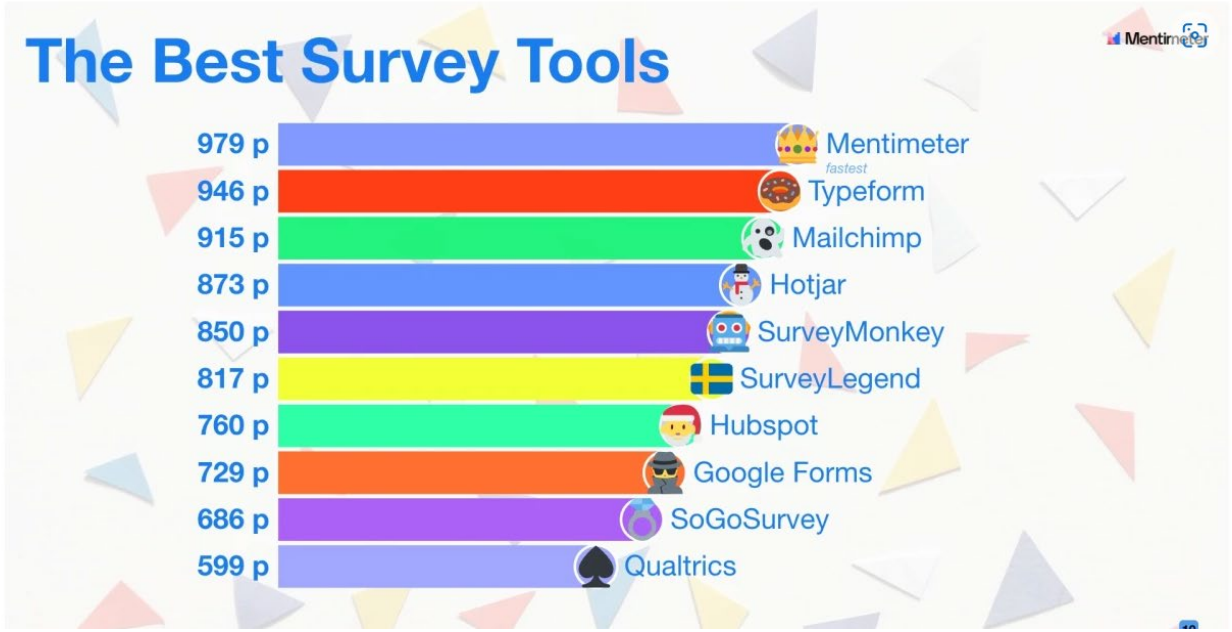
- **Range**
- **Standard Deviation**

# Basic Data Analysis



# Survey Tools

There are many, the choice is yours. Watch out for the amount of questions supported by the free version, as well as the number of responses available to obtain.




[10 Best Survey Tools & Software in 2023 - Mentimeter]

# Survey Tools

SurveyMonkey - you can **include only 10 questions per survey, and the maximum number of responses you can view tops out at 100**.

Typeform - The free version is limited to **100 responses per month**, and 10 questions per survey.

**Google Forms do not have a limit** as such, the data is held in a Google Sheet with 5 million line capacity.

# Why Google Forms?

- Benefit of Google Forms is the ability for users to design and edit their surveys on mobile.
- Google Forms excels cross-platform.
- While not the most thrilling design, this survey tool can be shared and responses analyzed easily



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# How to do online surveys in Google Forms?

- Google Forms is a free online software for creating surveys and questionnaires.
- You need a Google account to make a Google Form, but you don't necessarily need an account to complete a form.
- You can personalize your Google Form with question types, a header image, and a color theme.
- Google Forms differentiates itself from similar online software through its library of customization options.
  When creating your new form, you'll have the ability to select from a series of templates or design your very own.
  If you choose to make a new template, consider adding your logo and photos, and a custom color set to match.
- There is a  way to organize your forms through Google Forms' section tool. These can be helpful for longer surveys, as they break questions up into manageable chunks.
- Once you're ready to share your Google Form, click on the Send button at the top right of the screen. You send the Form via email, copy a link, or copy an embedded HTML code to add the form to your website or blog.



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# Respondents Errors

**Intentional**

- **Falsehoods** (privacy, fear of interviewer having a secret agenda, embarrassing situation)
- **Non-response** (partial or total, all types of data collection, major preocupation of market researchers today)

**Control** – **Guarantee anonymity and confidentiality**, incentives, validation, 3rd person technique

**Unintentional**

- Misunderstanding
- Guessing (not having enough information on the topic)
- Distractions
- Fatigue

**Control** – **Instruction examples**, reversals of scale endpoints, **promptomers** (we are almost finished, this was the most difficult question!)

# Non-Response Error

**Refusal to participate** (sensitive topic, privacy issues, no incentive)


- People may be **busy** or have **no interest** in the survey
- They may be **turned off** by the **interviewer's voice** or **approach**
- The survey topic may be overly **sensitive**
- May be a **standard response** for some people
- May be the result from negative **previous** survey participation **experiences**
- People may decline to participate because they do not want to take the time or reg ard surveys as an **intrusion of their privacy**
- There is **no incentive – what would be an incentive for your research?**

# Non-Response Error


2. **Break-offs during the interview** (long interviews, sensitive topics, complexity)

- The **interview may take longer** than the respondent initially believed. **Measure – be honest**!
- The topic and specific questions may prove to be distasteful, too personal, or boring
- The instructions may be confusing
- The survey may be too complex; or a sudden interruption may occur.

3. **"Item omission" - Refusal to answer specific questons**

It is useful for a researcher to offer the **"don't know"** option with some type of questions to reduce item omissions.

**Completed interview** – one in which **all the primary questions have been answered**

**Question - What is the best length?** no more than 10 minutes



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# Example of Error Detection

| Case | Data Matrix Column Labels | | | | | | | | | *Error Type*—Description of Error |
|---|---|---|---|---|---|---|---|---|---|---|
| | Q1 | Q2 | Q3 | Q4 | Q5 | Q6 | Q7 | Q8 | Q9 | |
| A | 1 | 2 | 3 | | | | | | | *Break-off*—Questionnaire is incompletely filled out. No answers after Q3. |
| B | 1 | 2 | 1 | | 4 | 2 | | 4 | 5 | *Item omission*—The respondent refused to answer particular question(s) but answered others before and after it. Q4 and Q7 are not answered. |
| C | 1 | 2 | 2 | 3 | 5 | 5 | 5 | 5 | 5 | *Yea-saying*—Respondent exhibits persistence to respond favorably (yea) regardless of the questions. Q5–Q9 are all 5, the code for "Strongly agree." |
| D | 2 | 1 | 3 | 1 | 1 | 1 | 1 | 1 | 1 | *Nay-saying*—Respondent exhibits persistence to respond unfavorably (nay) regardless of the questions. Q5–Q9 are all 1, the code for "Strongly disagree." |
| E | 2 | 1 | 3 | 1 | 3 | 3 | 3 | 3 | 3 | *Middle-of-the-road*—Respondent indicates "no opinion" to most questions. Q5–Q9 are all 3, the code for "Neutral." |

# Response Rates in Market Research

- Most marketing research report response rates.
- For many years there was a confusion about the calculation.
- There was no universal definition, different companies calculated it differently.

- Often **response rates** in survey research are calculated **simply by dividing** the **number of completed interviews** by the number of individuals who were selected to participate in the research, i.e. **the sample**.

- However, this method is **too simplistic** and does not do justice to the complexity of research design, sampling process and the practical difficulties of contacting and assessing potential survey participants.


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# CASRO Response Rates

Therefore in 1982 the Council of American Research Organization (**CASRO**) proposed **a method to better consider the various situations encountered in survey research**. This method formed the basis for the development of a **standard for the calculation of response rates.**

This method was adopted by the American Association for Public Opinion Research (**AAPOR**). This standard was further refined by the Institute for Social and Economic Research (**ISER**).

- **CASRO Response Rate Formula = N. of completed interviews / N. of eligible units in sample (Simple form)**

Eligible units are respondents determined by **screening** or **qualifying** questions.

Example: Do you use microwave? Have you used it in the last 3 months?



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# CASRO Response Rates

Example on a sample of 1000 shoppers:
Completions = 400
Ineligible = 300
Refusals = 100
Not reached = 200

## CASRO response rate formula:

**CASRO Response Rate Formula (Expanded Form)**

$$\text{Response rate} = \frac{\text{completions}}{\text{completions} + \left(\frac{\text{completions}}{\text{completions} + \text{ineligible}}\right) \times (\text{refusals} + \text{not reached})}$$

Here are the calculations.

**Calculation of CASRO Response Rate (Expanded Form)**

$$\text{Response rate} = \frac{400}{400 + \left\{\frac{400}{400 + 300}\right\}\{100 + 200\}}$$

$$= \frac{400}{400 + (0.57)(300)}$$

$$= 70.0\%$$



Madrid Campus: C/Numancia, 6 28039 Madrid
Barcelona Campus: C/Aragó, 179 08011 Barcelona
info@global-business-school.org
+34 930 086 588

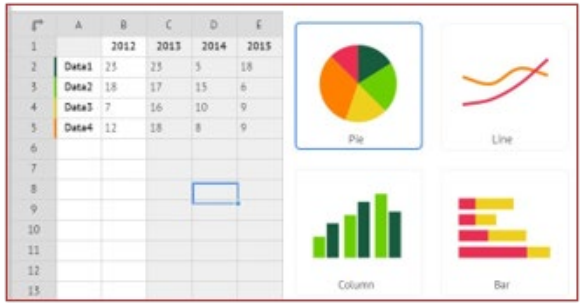
# Response Situations

- **Completed**. Rarely is an interview fully completed. According to the AAPOR system an interview is completed if the respondent was cooperative and at least 80% of the questions have been reliably and validly answered.
- **Partial**. At least between 50 and 80% of questions validly answered.
- **No-contact**. The eligibility and existence of the respondent could be confirmed but the respondent could not be contacted.
- **Refusal**. The respondent could be contacted and his or her eligibility could be assessed. The respondent refused to cooperate in the survey.
- **Break-off.** The respondent initially collaborated but refused later in the interview or the respondent could not be recontacted after an interview was suspended. Less than 50% of the questions have been answered.
- **Other**. The respondent could be contacted and his or her eligibility could be assessed. However, the respondent was unable to cooperate in the interview because of an illness or language problems. This category also includes interviews that were lost or invalidated.


Madrid Campus: C/Numancia, 6 28039 Madrid
Barcelona Campus: C/Aragó, 179 08011 Barcelona
info@global-business-school.org
+34 930 086 588

# Report Visuals

1. **Tables** – Identify exact values and allow reader to compare numerical data
2. **Graphs and charts** – Illustrate relationships among values
3. **Pie charts** – Circle divided into sections. Illustrate relative sizes, compare specific part of the whole to the whole. It should have between 4 and 8 segments. If there are many small segments they should be combined into "Other" category.
4. **Bar charts** – Very commonly used. It shows magnitude of response, compares items over time or shows correlations between them.
5. **Line graphs**
6. **Maps** – define geographical locations
7. **Photographs**
8. **Drawings** – focus on visual details






Madrid Campus: C/Numancia, 6 28039 Madrid
Barcelona Campus: C/Aragó, 179 08011 Barcelona
info@global-business-school.org
+34 930 086 588

# Your Eligibility Questions?



Madrid Campus: C/Numancia, 6 28039 Madrid
Barcelona Campus: C/Aragó, 179 08011 Barcelona

info@global-business-school.org
+34 930 086 588

# Key Points

- Frasing questions
- Sampling
- Fieldworkers
- Sampling error / Non-sampling error
- Data collection error - Fieldworker error & Respondent error
- Intentional / Unintentional errors
- Non-response error and Response rate
- Reliability / Validity
- Coding / Coding / Mutually Exclusive and Collectively Exhaustive (MECE)
- Softwares to use
- Best hints



Madrid Campus: C/Numancia, 6 28039 Madrid
Barcelona Campus: C/Aragó, 179 08011 Barcelona
info@global-business-school.org
+34 930 086 588

# TAM SAM SOM

- **Total Addressable Market or TAM** = the total possible market for your product or service, without limitations based on geography, distribution or product limitations

- **Serviceable Available Market or SAM** = the portion of your TAM that your product or service can actually reach given your geography, capabilities, and other relevant limitations to your business

- **Serviceable Obtainable Market or SOM** = the portion of the market you are aiming to capture, which should be aligned with your market share target, ideal customer profile, and sales territory maps

- **Market share** = the part of the market that your product or service has

TAM, SAM, SOM: What's the Difference? (scalepath.io)



Madrid Campus: C/Numancia, 6 28039 Madrid
Barcelona Campus: C/Aragó, 179 08011 Barcelona
info@global-business-school.org
+34 930 086 588

# What Will Be Your Deliverables?

Prepare a **document** with **research questions (survey in Word format)** for your project.
Upload to VLE.

It will be commented in the Individual Project Live Session

Prepare a detailed **a report on your research findings** (Word) and **TAM SAM SOM**.
Prepare a **PPT presentation of your findings.** Present it at the Individual Live Session.



Madrid Campus: C/Numancia, 6 28039 Madrid
Barcelona Campus: C/Aragó, 179 08011 Barcelona
info@global-business-school.org
+34 930 086 588

# Tips for Conducting Market Research

Here are some tips that your startup can use to do market research:

- **Be clear:** Before beginning your market research, have clarity about your objectives.
- **Target audience:** Know your target audience – the who and the how many. Choose a sample for quality insights. Also, choose a relevant and representative sample.
- **Social media:** Don't ignore social media feedback on your research. Incorporate feedback you receive on social media.
- **Give it a personal touch:** Add a personal touch to the research. Say thank you at the end of the survey. Give respondents a background of the study at the beginning.
- **Use open-ended questions carefuly, but use them:** Provide space for open-ended comments to help respondents express themselves fully.
- **Mixed research methodology:** Have a mix of qualitative and quantitative data collection and be open to discussion forums.
- **Embrace criticism:** Don't ignore criticism you receive on surveys. It is the most valuable and honest feedback you receive.
- **Reward respondents:** Use some sort of a reward as a motivation factor for your respondents.


Madrid Campus: C/Numancia, 6 28039 Madrid
Barcelona Campus: C/Aragó, 179 08011 Barcelona
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+34 930 086 588

# Thank you!

Generalitat de Catalunya
Departament d'Empresa i Treball

Cofinançat per la Unió Europea

Subvencionat pel Departament d'Empresa (**Programa Primer)** i amb el cofinançament del Fons Social Europeu Plus

g-accelerator@global-business-school.org
+34 930 086 588