

# **Formative Research**

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## **Consumer Orientation**

- ❑ Designed to help you make well-informed marketing decisions
- ❑ From the consumers viewpoint

## **Decision-Driven**

- ❑ Realistic behavioral objectives
- ❑ Priority segment
- ❑ Benefits
- ❑ Costs and other factors
- ❑ Place
  - Locations
  - Intermediaries
- ❑ Promotion
  - Spokespersons
  - Information channels
  - Communication guidelines

## **Appropriate Uses of Qualitative Research**

- ❑ Discover or identify hypotheses
- ❑ Describe
- ❑ Create vivid picture
- ❑ Prepare survey instruments
- ❑ Interpret quantitative findings

## **Appropriate Uses of Quantitative Research**

- ❑ Estimate or measure
- ❑ Confirm hypotheses
- ❑ Identify determinants statistically

## **When it is appropriate to rely only on qualitative research**

- ❑ Budget and/or time is very limited
- ❑ No previous research on topic
- ❑ Unable to prepare valid survey questions

## **When it is appropriate to rely only on quantitative research**

- ❑ Previous findings available
- ❑ Able to develop valid survey questions
- ❑ Have sufficient time to pilot test and administer survey

### **Mixed Methods**

- ❑ Qualitative then quantitative
- ❑ Qualitative findings inform survey development and interpretation
- ❑ Quantitative then qualitative
- ❑ Qualitative helps explain survey findings
- ❑ Qualitative, quantitative, qualitative

### **Data Collection**

- ❑ Systematic observation
- ❑ Individual in-depth interviews
- ❑ Focus groups
- ❑ Surveys

### **Recruiting Sample**

- ❑ Who to study
  - Eligibility criteria
    - Inclusion
    - Exclusion

### **Sample Sizes**

- ❑ Qualitative
  - Saturation
  - Sufficient redundancy
  - Estimates
    - Individual – 15 per subgroup; total of 60 often enough
    - Group – 2-3 per subgroup; 8 often enough

### **Survey Samples**

- ❑ Depends on types of analyses plan to conduct
- ❑ Considerations:
- ❑ Generalizability
  - Probability sampling and random selection
  - Power analysis
- ❑ Understanding and living with bias

## Key Points

### Participant Observation

- ❑ Start discovery process
- ❑ Generate understanding of cultural context
- ❑ Identify behavioral patterns

### In-depth Interviews

- ❑ Use open-ended questions
- ❑ Dig deep into feelings and attitudes
- ❑ Adjust questions to fit situation
- ❑ Explore complex subjects or decisions
- ❑ Combine with semi-structured questions

### Focus Groups

- ❑ Watch group interaction
- ❑ Generate breadth of ideas quickly
- ❑ Encourage self revelation
- ❑ Identify suppressed themes

### Surveys

- ❑ Segment audience
- ❑ Identify determinants
- ❑ Collect baseline data

### Types of Surveys

- ❑ Central location intercept
- ❑ Telephone
- ❑ Mail
- ❑ Door to door

### Survey Methods

- ❑ Access to participants
- ❑ Time and personnel needed
- ❑ Geographic dispersion
- ❑ Complexity of questions
- ❑ Interviewer assistance
- ❑ Other factors

### Low Cost Experiments

- ❑ Naturalistic opportunities
- ❑ Pilot tests
- ❑ Collect pre-measures
- ❑ Case and control
- ❑ Intervene
- ❑ Collect post-measures
- ❑ Use results to make decision

## **Sample Sizes**

- ❑ Strategy of theoretical saturation
- ❑ Sufficient redundancy
- ❑ Estimates
- ❑ Individual – 15 per subgroup; total of 60 often enough
- ❑ Group – 2-3 per subgroup; 8 often enough
- ❑ Surveys
- ❑ Depends on analysis plan

## **Sampling Frames**

- Selecting respondents
  - Randomly
  - Everyone given a number so can be selected using table of random numbers or computer program
  - Systematically
    - Select every X name
    - Extreme cases
- Understanding and living with bias

## **Budget Estimates**

- Personnel
- Travel
- Equipment
- Subject incentives
- Reports
- Printing and copying
- Distribution costs

## **Focus group costs**

- Refreshments
- Facility fees
- Child care
- Transportation

## **Survey Costs**

- Printing
- Long distance charges

## **Ways to Cut Costs**

- Use existing data
- Program data
- State, regional or national datasets
- Published literature and CDC audience research
- Ask list serve members for study results
- Use local resources

## Overcoming Resistance

- Use existing data and expertise
- Make marketing useful
- Tie data to decisions that the program manager must make
- Avoid fishing expeditions
- Cut unnecessary costs

## Resources

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