ZELDIS
RESEARCH ASSOCIATES

WHAT'S OLD IS NEW: HOW PRE-TESTS PUNCH ABOVE THEIR WEIGHT

01

Survey pre-tests used to be best practice. In the old days of marketing research, it was best practice to pre-test a questionnaire with several authentic respondents as a disaster check. Often, this was conducted by phone or even in-person, so that researchers can identify questionnaire "sticking points" and ask follow-up questions to understand respondents' thoughts and question interpretations. However, over the years, the need for faster research, the rise of online data collection, and the reality of tighter budgets have nearly eliminated pre-tests. Until recently, it has been virtually unheard of for us to see an RFP or have a proposal discussion where our clients said, "…and of course, let's plan for pre-tests."

Research implication:

When we don't test surveys with authentic respondents, we don't know what we don't know. We all test questionnaires internally and with our client subject matter experts. But that isn't the same. We are *professional* respondents.

We "get" every instruction, every compact phrase, every connection that should be made between a question stem and an attribute list. However, it is humbling to have a survey reviewed multiple times by market research staff and client subject matter experts, then talk it through with a real customer or prospect, and hear real respondents interpret some questions differently than you ever imagined. We and our client subject matter experts are good at what we do. But maybe we're too expert to see the world the way non-professional respondents do.

02

More of our clients are once again using survey pre-tests. Our clients are realizing that pre-testing is still valuable – perhaps more valuable than ever, with our industry's drive toward mobile-optimized surveys designed to be taken on a phone or tablet, perhaps while multitasking. How can pre-tests fit in a fast-paced, budget conscious environment? Some of our clients are starting with just a few pre-tests – as few as two or three – that can be completed in one day and have little budget impact. We still believe that interaction is necessary for a useful pretest, but now we can utilize technology for that as well. For some clients, we conduct "screen-share" pre-tests, where the questionnaire is still a Word or PowerPoint document, but not final and before it is programmed. We can test multiple alternative wordings and easily revise to test refinements in the next pre-test, with little time delay and budget impact, because the programming has not been started yet.

To pre-test, we use a cognitive interviewing approach. We ask respondents (customers or prospects) to think out loud, telling us in their own words what each question is asking them, what their answer is, and if anything is confusing about the question or answers listed. This gives us a window into their thinking and lets us understand whether the questions and response options mean the same to respondents as they do to us.

Research Implication:

A few pre-tests with real respondents can provide a disaster check on your most important metrics. Do respondents understand the conjoint instructions that seem so obviously simple to a professional researcher? Do respondents report that a cut-off threshold in a screener question is way too low or way too high, in their experience? Do respondents indicate that the response they want to say is not shown, so they need an "other/specify" or a response category added, otherwise they would just randomly choose a response? Do respondents not see the "not applicable" response option and use the scale midpoint instead, muddying up results?

Pre-tests as mini-Qual. In the old days, pre-test data were generally discarded after the full survey launch. But in today's cost-conscious, value-driven environment, they can be used to provide insight as well. Pre-tests can also be treated as mini-qualitative research. Pre-tests do not replace the benefits of a standalone, full scope qualitative study. But sometimes clients do not have time or budget for a full, traditional qualitative phase prior to a quantitative study. In these cases, a pre-test of the draft quantitative questionnaire becomes a mini-qualitative exercise. In some cases, these have larger samples, with 2-3 respondents per subgroup.

03

Research Implication:

In addition to validating respondents' understanding of attributes and instructions, we have used pre-tests as mini-qual to explore for key drivers of customer experience that may be missing in the questionnaire scope, to validate customer journey maps, and to confirm the alternative word choices that will be taken into quantitative message testing. These discussions also help socialize the questionnaire within client teams and engage them going into the quantitative launch. These can be executed as one-on-one in-depth interviews. Alternatively, they can be conducted as mini-webcam focus groups, providing an opportunity for respondent cross-talk and creative exchanges.

The old tool of pre-tests can be used efficiently and quickly in our new world of speed and cost-conscious research and deliver benefits that punch well above their lightweight demand on time and budget.