Breakthrough or bust?

How to test your ideas in 4 easy steps

SurveyMonkey® | Market Research Solutions

Using data to surface the best ideas

Let's say you're a marketer about to launch a new snack food ad campaign and your creative team is proposing a couple of great ideas. How do you know which to choose? Go with your gut? Team vote? Ask your mom?

Testing an ad, a product, or any idea with your target audience can be a gamechanger. It can offer up insights that reinforce your ideas, or it may surface data that leads you to change direction. Either way, it's one of the most effective ways to ensure a successful launch.

In the past, concept testing has been reserved for companies who could afford super-customized research and had time to wait for results. But today, powerful new technologies make this kind of testing available to any organization, on demand.

In this guide, you'll learn about a brand new approach to concept testing that is an accessible, affordable, and super-fast way to understand if your idea is ready for the market—or if your market is ready for your idea.

# Types of concept testing studies

What

What kind of ideas can you test?

From ad creative to product packaging, concept testing is a flexible framework that can be applied to a range of initiatives. It's a great way for marketers, insights pros, or agencies to collect data about a product, an ad image, or a message–before it goes to market.

Let's say you're considering a new buckwheat snack cracker, and want to understand how it will perform with both gluten-free consumers and the general public.
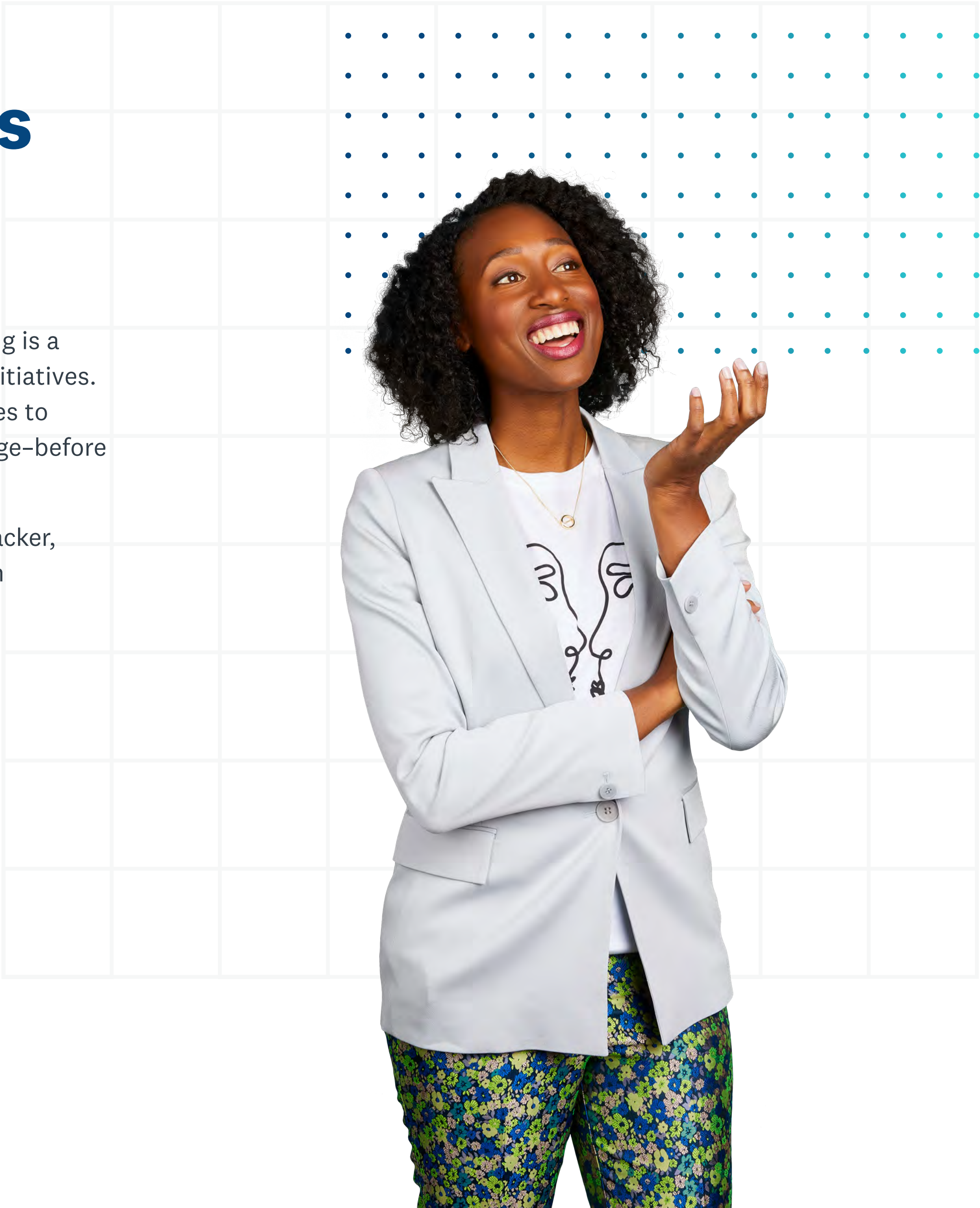
Here's how concept testing can fit in:
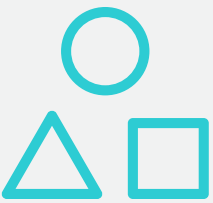
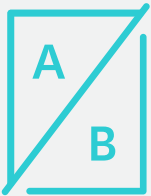### Product concept test

Does a buckwheat cracker hold appeal beyond a gluten-free audience? Is a buckwheat cracker more or less appealing than other savory snack products?

Advertising test

Does my ad make my new cracker appealing to any audience?

Packaging test

Will my packaging attract both gluten-free and general consumers? Does it stand out compared to other savory crackers?

When does concept testing make sense in the product life cycle?

Development	**Introduction**	**Growth**	**Maturity**	**Saturation**	**Decline**
Product ideas	Ads	Product ideas	Ads	Ads	Messaging
Names	Claims	Names	Messaging	Rebranding	Rebranding
Logos	Messaging	Logos	Line extensions	Restages	Restages
Packaging	Taglines	Packaging	Restages	New products	New products

Test your concepts in 4 easy steps

How

How to test your concepts:
4 easy steps

STEP ONE

Select your target audience

STEP TWO

Set up your survey and test your ideas

STEP THREE

Analyze your results and pick the winner

STEP FOUR

Present your insights and take action

Select your target audience

Once you've pinpointed the goal of your study, it's easier to identify your target audience, and how many people you will need to reach. In our gluten-free cracker example, it will be important to target both gluten-free consumers and general consumers.

Targeting Considerations

Respondent source

A successful concept test depends on where you get your responses, and whether you can accurately pinpoint a representative sample of your target audience. Avoid surveying your personal network or existing customers as these sources are likely less representative of the overall market and will introduce bias into your results.

Market research panels provide a cost-effective way to reach your target market. Choose a trusted panel source that proactively monitors their response quality and takes actions against poor data quality.

SurveyMonkey Audience panel

Target your ideal audience and get representative market feedback on your product and marketing concepts. Our global panel is integrated into Expert Solutions and provide you with:

1 Instant access to 80M people in 100+ countries

2 Proprietary panel plus panels from our trusted partners

3 Bot and fraud detection and regular calibration for the highest data quality

Targeting Considerations

Targeting criteria

Most online panels profile their respondents so you can select from options like:

Demographics
Location, age, gender, education, household income, and more

Employment & firmographics
Employment status, job function, industry, company size

Shopping habits
Online shopping frequency, recent stores or restaurants, likelihood to purchase

Behavioral attributes
Mobile device/app usage, pet ownership, exercise frequency, dietary restrictions, hobbies

Sample size

The number of people you survey depends on your budget, how feasible the sample is, and your methodology. The more responses you get, the narrower the margin of error on your results, and the more likely you are to see statistically significant differences between how your concepts scored. A good rule of thumb is to survey at least 250 respondents per concept, with 400-600 being even more ideal.
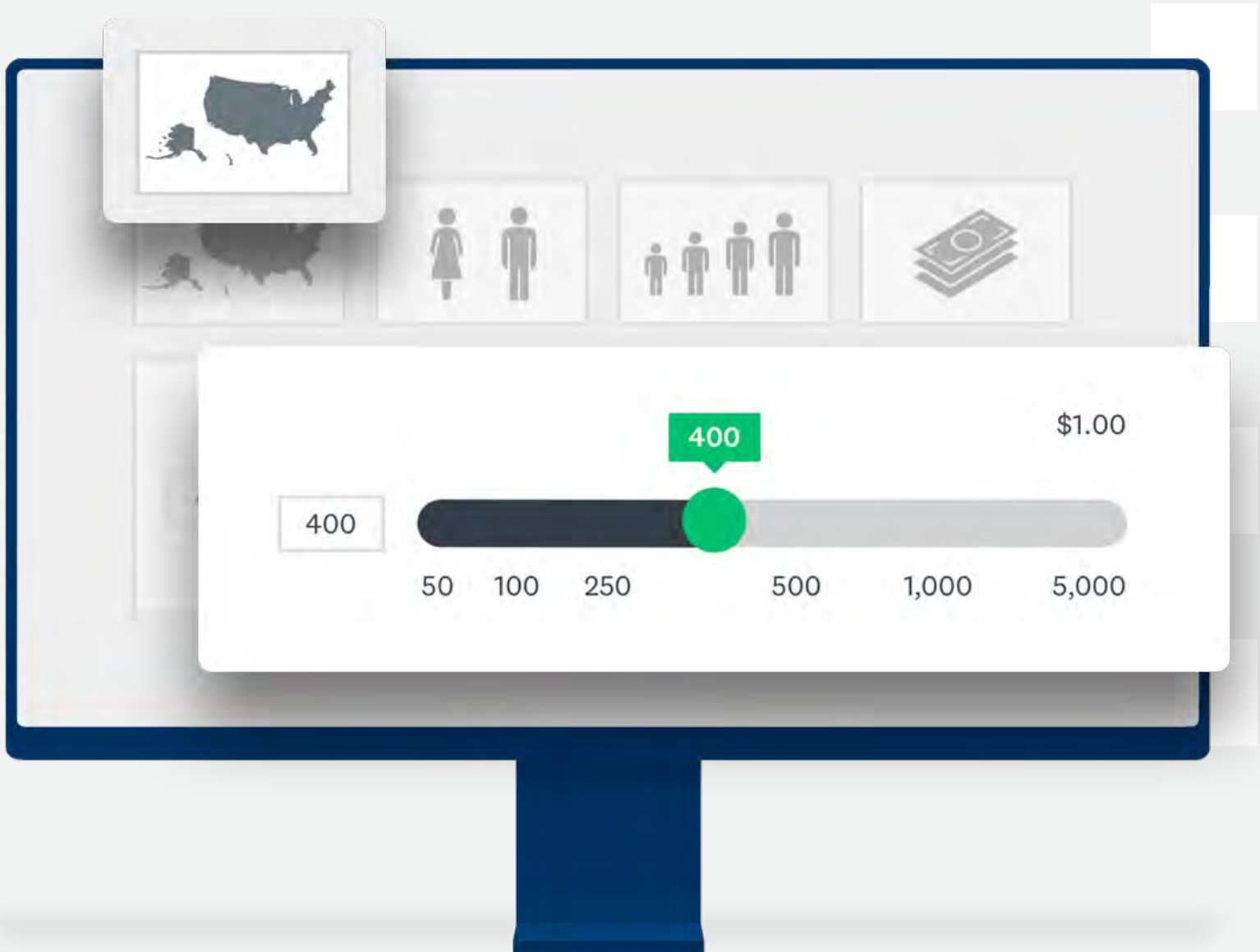
Screening questions

Screening questions help you reach your target audience by asking a question at the beginning of your survey to disqualify the people you don't need.

Screening questions help when the targeting criteria doesn't quite get you the niche audience you require. In the buckwheat cracker example, you could start with a screening question that eliminates people who haven't purchased crackers in the last 12 months.
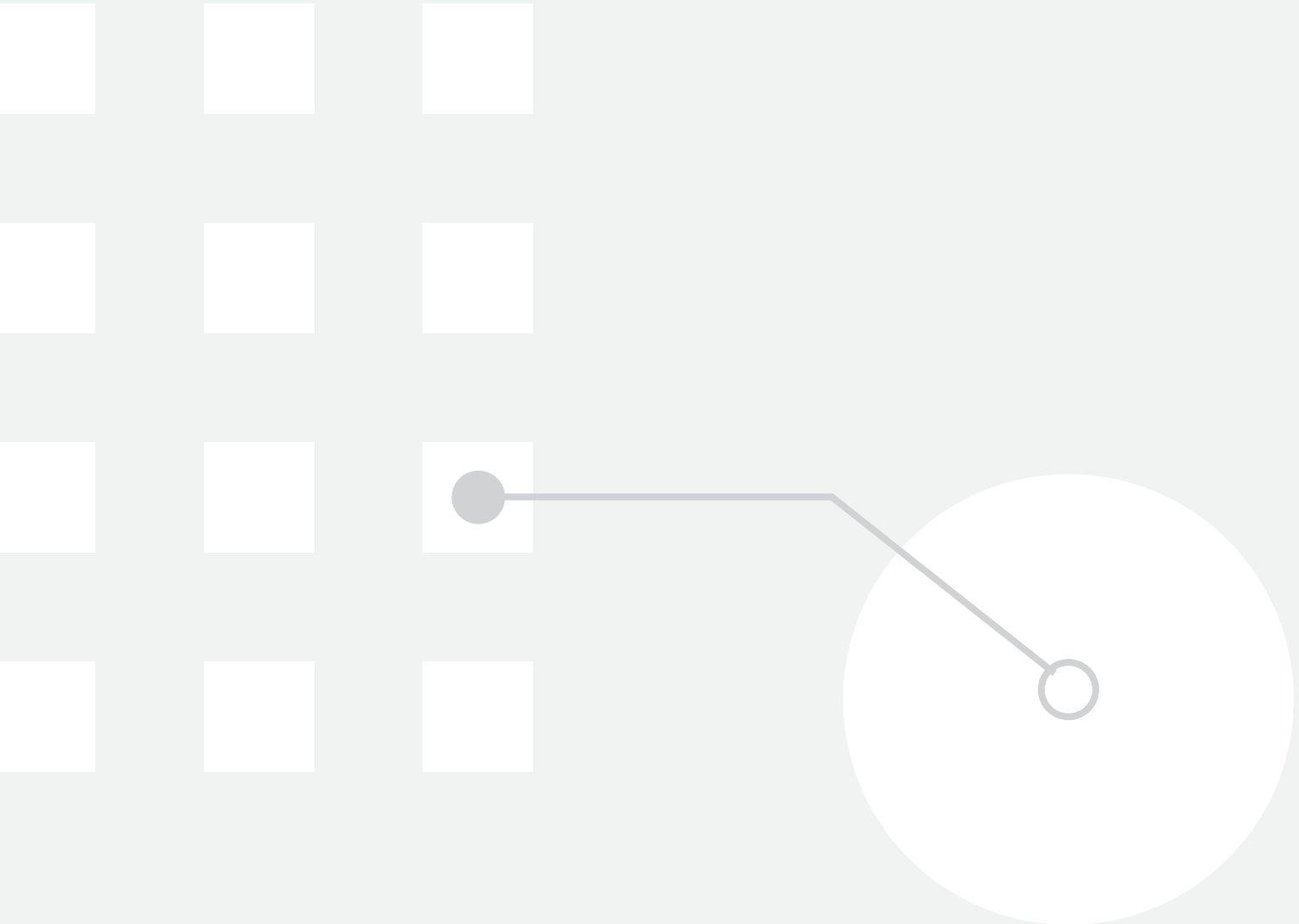
Best practices

Selecting your target audience:

Match your research audience to the target audience of your upcoming launch
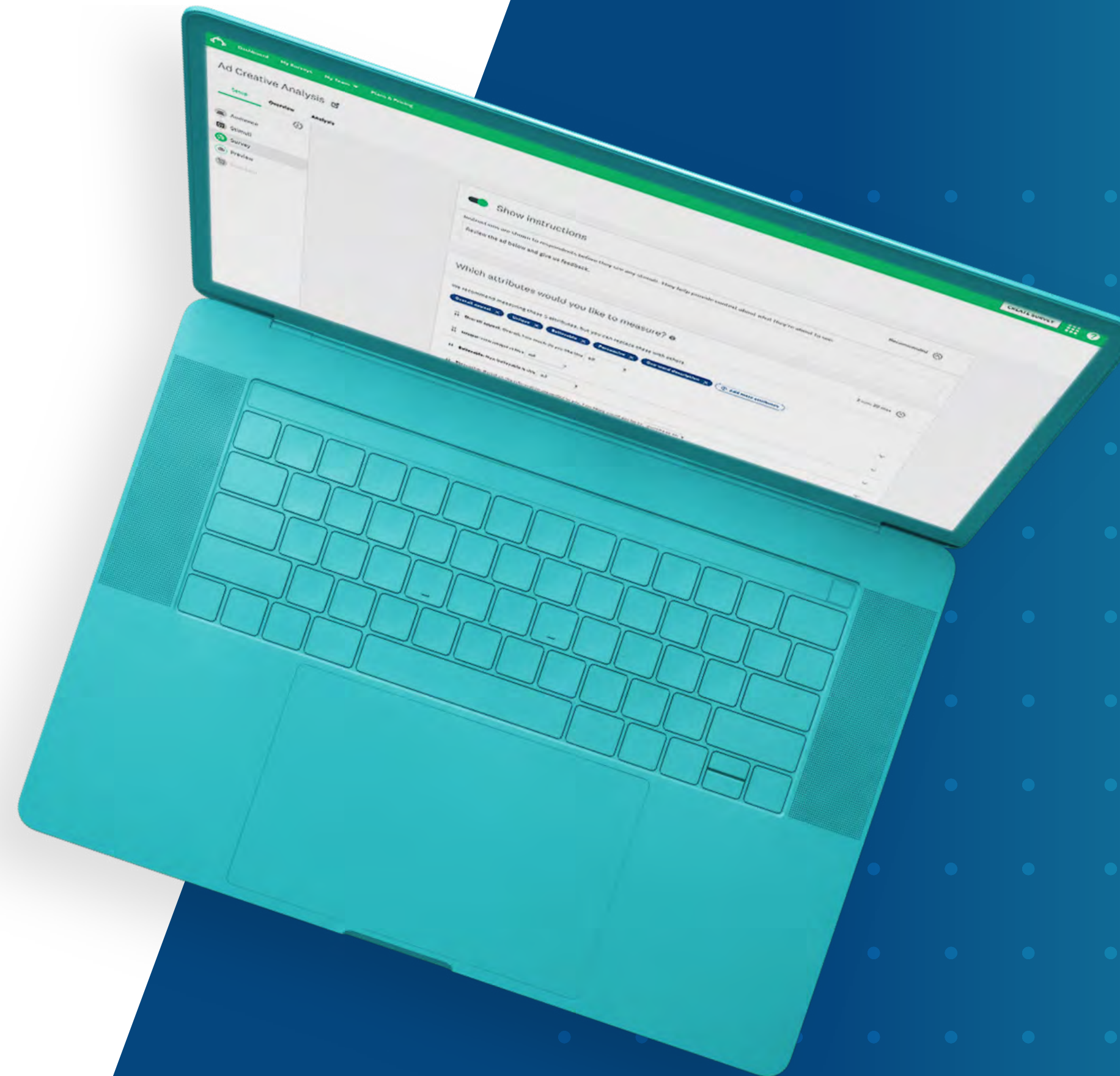
Use screening questions to refine your audience

Get representative responses by using a market research panel

Purchase enough responses to ensure statistically significant results

Set up your survey and test your ideas

Questions, stimuli, and attributes. These are the building blocks of your concept testing study and will dictate the quality of the data you collect. Take some time thinking through these elements, add in the right methodology, and you've got everything you need for a successful study.

The typical flow of a concept testing survey has the following elements:

Screening & category questions

▷

Stimuli exposure

▷

Attribute questions

▷

Additional demographic questions
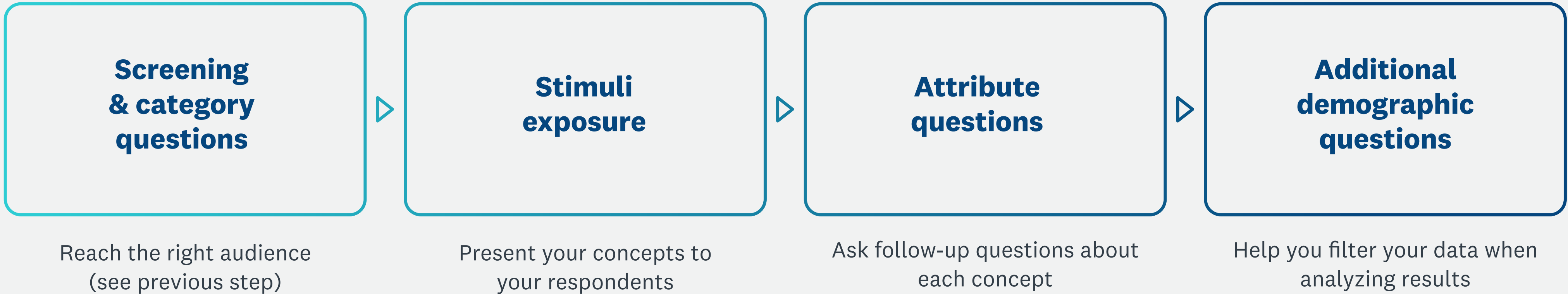
While the overall structure of concept testing surveys is industry-standard, there are a lot of ways you can customize your study for your needs.

Reach the right audience (see previous step)

Present your concepts to your respondents

Ask follow-up questions about each concept

Help you filter your data when analyzing results
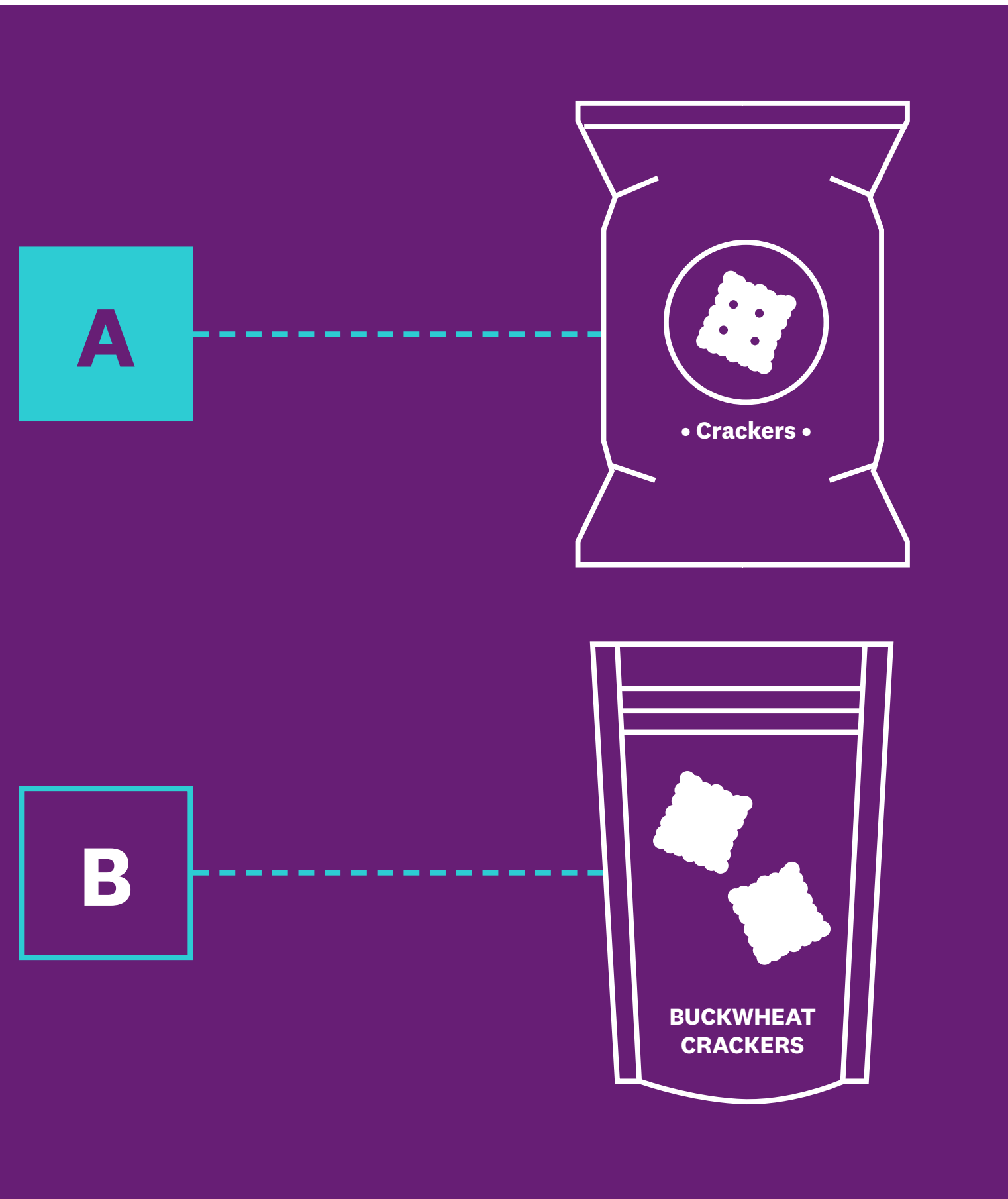
Prepare your stimuli

Stimuli are the individual things you want to test in your survey; whether they are ads, names, products, or packaging. If you are testing Concept A against Concept B, both are stimuli.

A

• Crackers •

B

BUCKWHEAT
CRACKERS

There are 3 general formats for stimuli:

Text (Names, messaging, ad copy)

Images/GIFs (Logos, ads, packaging)

Video (Internet, TV, or social media ads)

Here are some tips:

• Use consistent stimuli formatting and quality

• Avoid blurry or confusing images

• Make sure your stimuli are in standard formats like PNG, JPG, GIF, or MOV

• Check to see if your stimuli can be viewed on all devices

• Use minimal text on visuals and make sure it's legible

• Limit text stimuli to 100 words or less

• If you're testing one idea, try comparing it to the competition or previous iterations

• Test your concept against industry standards with benchmarks (more on those later)

Choose your attributes

Attributes are the success criteria you'll use to compare your concepts against each other. Most attributes either come in the form of an open-ended question (such as, what is the first word that comes to mind when you look at this ad?) or a closed-ended Likert scale question about a particular attribute:

Based on the information presented to you, how likely would you be to purchase the product?

Extremely likely

Very likely

Somewhat likely

Not so likely

Not at all likely

Here are a few standard attributes you can use in your next concept test:

Metric	Product	Ad	Logo	Name	Package	Claims
Appeal	✓	✓	✓	✓	✓	✓
Believability	✓	✓	✓	✓		✓
Ease of finding			✓		✓	
Innovativeness	✓					
Purchase intent	✓	✓	✓	✓	✓	✓
Pronounceability				✓		
Quality	✓				✓	
Relevance	✓	✓	✓	✓	✓	✓
Uniqueness	✓	✓	✓	✓	✓	✓
Value	✓					

In addition to attribute questions, you can customize your study with questions that act as filters for your analysis—like category usage questions or additional demographics.

Decide on a methodology

There are several approaches you can take which will determine your survey length and how many responses you'll need.

With a **monadic** study, randomly divide your target audience into subgroups, show each subgroup a different stimulus, and compare the responses. Each respondent sees and answers questions about one stimuli per survey.

In a **sequential monadic** study, show your target audience all the stimuli in the same survey, in a random order. Each respondent sees one stimulus at time and answers questions, then repeats the process with a second or third stimulus, as needed.
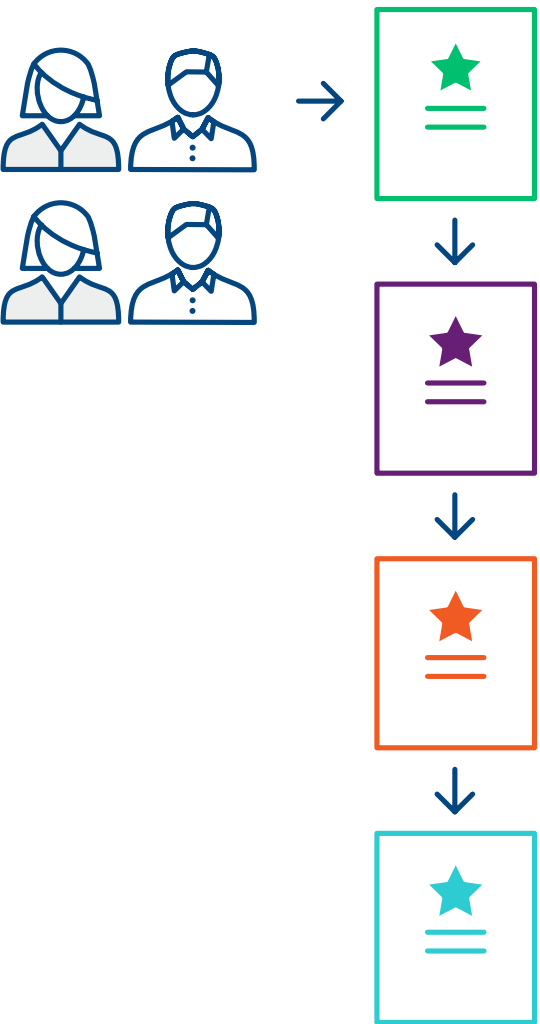
A **forced choice** study requires respondents to choose between multiple stimuli that they see all at once. It's common to run a monadic or sequential monadic study and include a forced-choice question at the end.
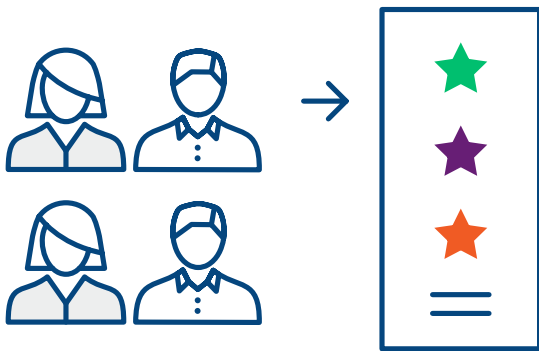
Expert, built-in methodology you can trust

SurveyMonkey Expert Solutions methodology is designed to collect the highest quality data.

We use a monadic design, which eliminates order bias and reduces survey fatigue.

You can simply use our default methodology to take the guesswork out of designing your survey. Or, customize your study by choosing the attributes you want to measure and adding custom questions.

Best practices

Setting up your survey:

Present your stimuli neatly and consistently to avoid biasing your respondents

Avoid using too much text in stimuli images

Tailor the attributes you measure to the type of concept you're testing

Use a monadic methodology when your budget allows

Keep the total number of questions in your survey below 30

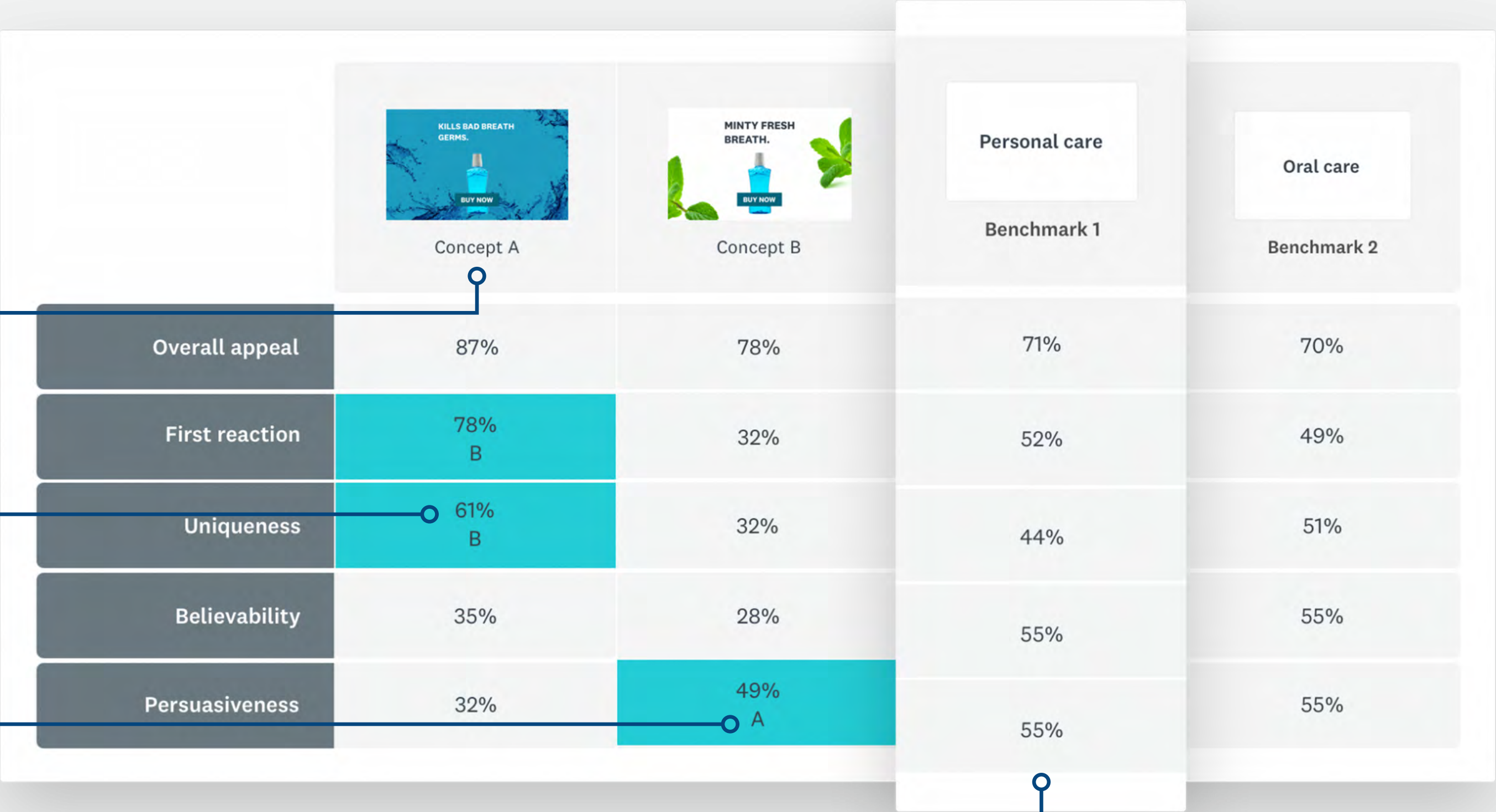# Analyze your results and pick the winning concept

The results are in! Now it's time to make sense of them and efficiently uncover insights for your team and stakeholders.

B

A ✓ **83%**

Build your scorecard

The most common way to present concept testing results is in a scorecard. This allows you to see the results across attributes and stimuli at a glance. Here are the key elements included in a typical scorecard:

Letters are assigned to each concept

All percentages in the master scorecard are Top-2-Box Scores (e.g.: Extremely appealing + Very appealing)

Letters and highlights indicate statistically significant differences at a 95% confidence interval

Benchmarks are based on studies with real, in-market ads for a specific product/service category

	Concept A	Concept B	Personal care Benchmark 1	Oral care Benchmark 2
Overall appeal	87%	78%	71%	70%
First reaction	78% B	32%	52%	49%
Uniqueness	61% B	32%	44%	51%
Believability	35%	28%	55%	55%
Persuasiveness	32%	49% A	55%	55%

Concept A: KILLS BAD BREATH GERMS. BUY NOW
Concept B: MINTY FRESH BREATH. BUY NOW

Compare against industry benchmarks

Benchmarks help put your concept testing results in perspective. A score of 75% might indicate that your audience likes your ad, but if similar ads score 85%, then yours may not be as attractive as you think.
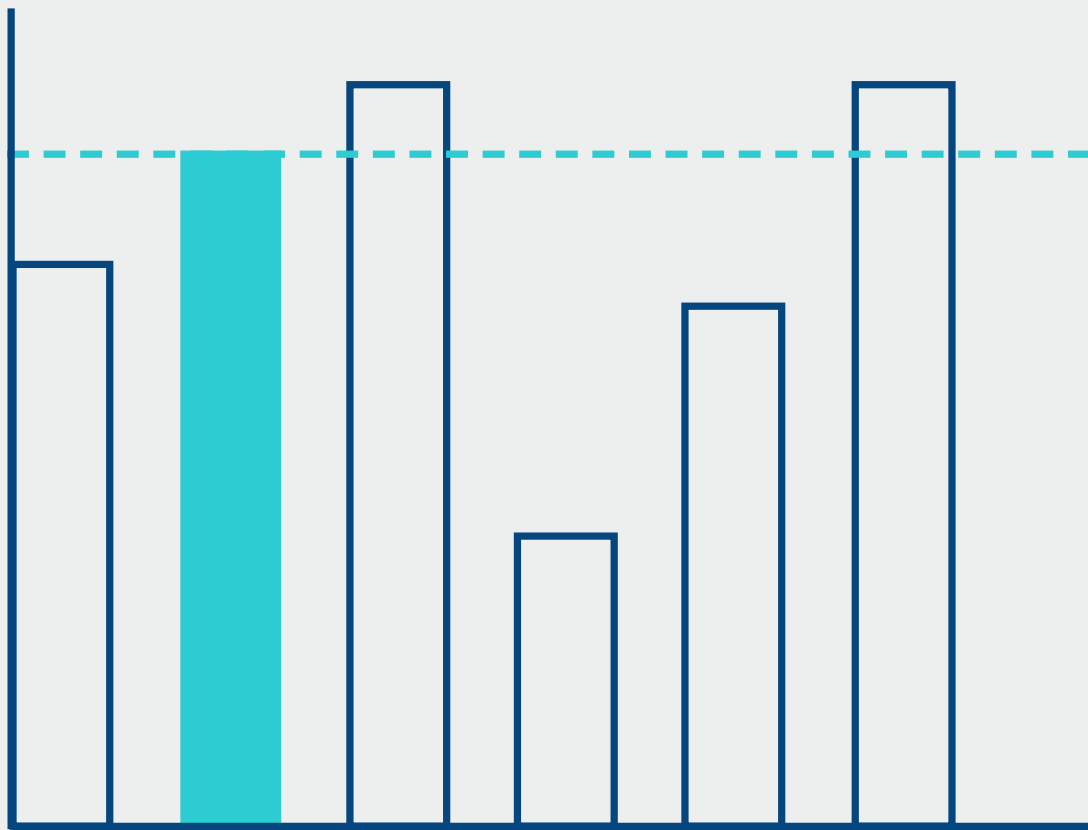
Adding benchmarks to your study tells you how well an average concept performs in your industry, and compares your concept against market standards.

But, benchmark data should be specific and relevant to your industry, or the data may not be trustworthy. For example, if your buckwheat cracker ad was compared to an ad for a sweet snack food, it may lose against a product that appeals to an audience that is less health conscious.

Ultimately, you want your ad to stand out against the competitive set for your purchase category, so that people shopping in that category choose your brand. So, the more relevant the benchmark is, the more confident you can be that you're looking at a comparison that reflects what will happen once you launch.

SurveyMonkey benchmarks

2M+

People answer SurveyMonkey surveys per day

Hundreds of thousands of survey respondents need to be collected to create a benchmark database that covers many industries. SurveyMonkey is in a unique position to solve that challenge.

Every day, over 2 million people answer SurveyMonkey surveys, which gives us quick access to a large number of diverse respondents who represent dozens of industries.

We created surveys that mimic the methodology in our Expert Solutions using real products and creative that exist in the market today. Our benchmarks are regularly updated so you know they're relevant when you need them.

Make sense of open-ended responses

Questions that let respondents answer with a comment can provide valuable information. But unstructured data, like text responses, can be challenging to analyze.

A word cloud lets you quickly interpret open-ended responses with a visual display of the most frequently used words. You can customize the look of your word clouds by changing colors or fonts for specific words to add visual appeal and make unstructured text responses easier to interpret.

Questions

Clean		13.59%
scents		5.43%
smell		4.35%
Good		4.08%

Word cloud

Uncover insights

Once you have a scorecard, benchmarks, and organized open-ended responses, you might have enough to make a quick decision. However, if your results are close, you might need to dig a little deeper.

A great way to uncover deeper insights is to filter your results on specific segments of your sample. It allows you to see which of your stimuli won in different categories, such as age bracket, income bracket, geographic location, or any other filter you established at the start of your survey. Be careful though, the more you filter down your results, the less likely you are to see statistically significant differences due to low sample sizes.

Dig deeper with AI-Powered insights

Exporting and manipulating data is a critical step in concept testing. Companies often resort to cutting data and manually manipulating it in spreadsheets, which can be time consuming and require a certain level of expertise.

SurveyMonkey AI-Powered Insights uses machine learning and data science to uncover the insights in your data.

Our Expert Solutions incorporate this unique algorithm to analyze your results against hundreds of demographic combinations so you can quickly see which concepts each respondent group preferred.

Pick a winner

Picking a winning concept to implement may seem like a pretty obvious exercise at this point. Build your scorecard, highlight the statistically significant metrics, and select the concept that has the most metrics highlighted. Sometimes it really is that simple, but not always.

Oftentimes you've got to take into consideration more factors than simply which concept wins. What if you're testing a product that your customers clamored for or an ad campaign that supports a broader company goal?

Take the survey results in the context of all the other data points at your disposal to make a decision. If you're testing a new ad against an ad you've been running for years and your company strategy is to provide a fresh perspective, it might be OK if the old ad still beats the new one by a few percentage points.

Best practices

Best practices for analyzing results and presenting insights:

Organize your results into a digestible format like a scorecard

Contextualize your data with industry benchmarks

Filter your data on key audience segments to uncover insights

Consider your results in the context of other factors like customer feedback or business strategy

Present your insights and take action

At this point you're at the home stretch, but the work doesn't end when the results are in. Now it's time to drive to a decision and action using the insights you gathered.

Attribute Scorecard: Overall Appeal

Word Cloud
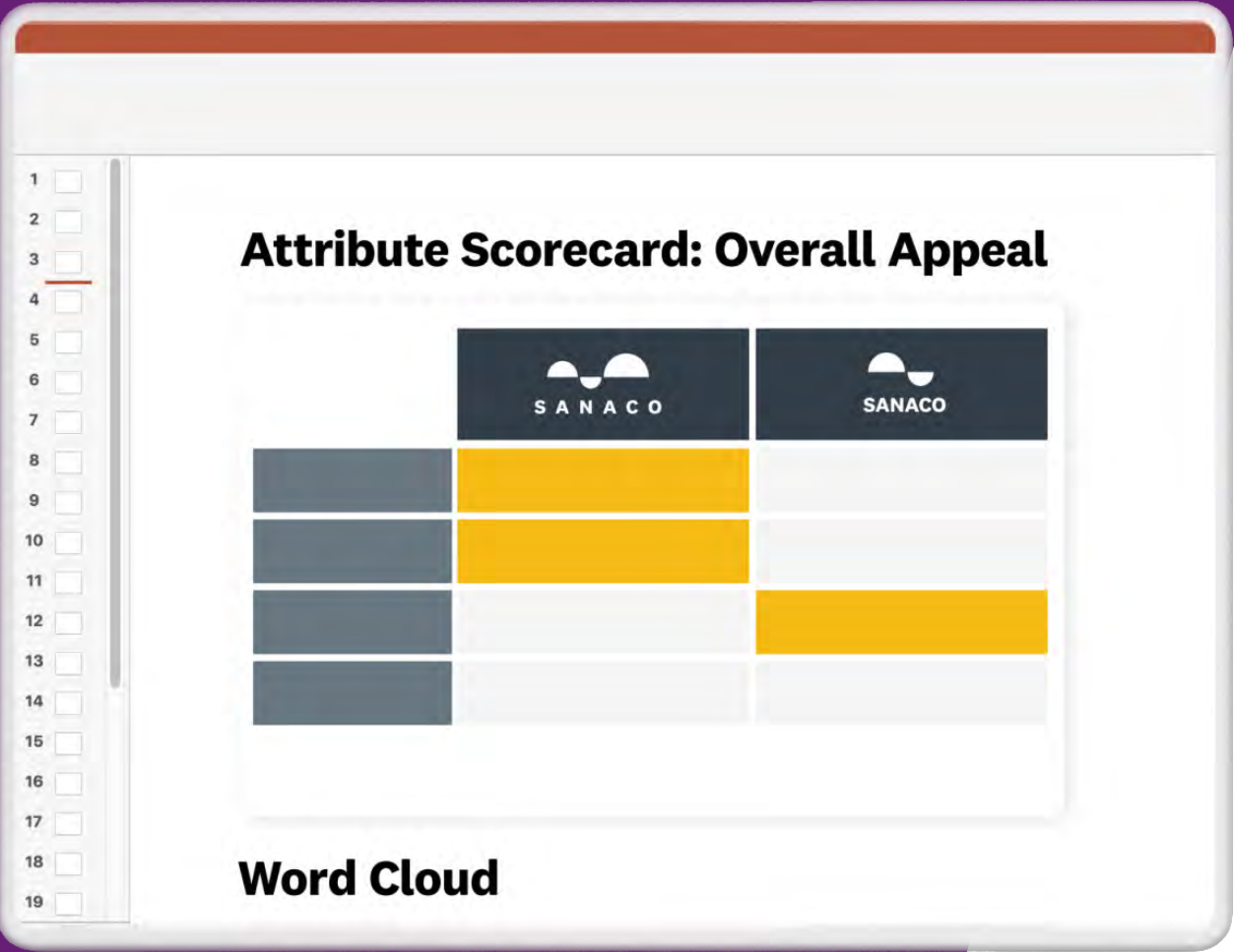
Present your findings

Now it's time to show and convince your stakeholders that the concept you've chosen is the best. That means putting your results in a format they can understand (and that fits easily on a presentation slide). Scorecards are perfect for that because they're quick to interpret.

Think of this step as telling a story: start with the goal of your study, include your hypothesis. Make sure to include any surprising, or even alarming, findings—that's why you started your concept test in the first place!

Add your key findings and recommendations. If your data indicates it's time to change course, then make sure you can clearly support that finding.

Take action

Congratulations! You successfully launched your concept test and got meaningful insights from your analysis. Now, if you're part of a research team, maybe all you have to do is hand off your results and recommendations. But if you have ownership of an ad or product process, the next steps are up to you.

Remember: Don't be afraid to pivot or change course if the data shows something alarming, surprising or if it brings up something you hadn't considered before. After all, that's why you began this test in the first place. The ultimate goal is to help you take a shot that's going to be good for your business.

Best practices

Picking a winning concept and taking action:

Take your insights on a roadshow with key stakeholders

Wrap your insights into a narrative, and include your strategic recommendations

Be bold and decisive, don't be afraid to pivot, and let the data be your guide

Real-world examples of concept tests

See

Mrs. Meyers: Ad Creative Analysis

Background

Let's say Mrs. Meyers Clean Day,® a consumer cleaning product company, wants quick feedback from their target audience (primarily women 18-65) to validate which ad creative will perform best.

For this example, we ran an Ad Creative Analysis study to test 3 ads, highlighting different value props and visuals.

Goal

To understand which ad resonates most with consumers, specifically for the female demographic.

Ad A focuses on "amazing scents"

Ad B focuses on a clean and happy home

Ad C introduces the cleaning power

Key insights

1 Ad A scored highest for the most attributes including overall appeal, believable, attractive, and quality.

2 However, the pun in the tagline of Ad C, "cleans like the dickens", made it the most memorable.

3 We used 2 benchmarks: cleaning products and kitchen cleaning products. Overall, all 3 ads performed better than the industry benchmarks.

Mrs. Meyers: Ad Creative Analysis

Sample Size: 573
Location: United States
Regions: All regions
Age: 18-65
Age Balancing: None
Income: $0-$200k+
Gender: Female

	A "Amazing Scents"	B "Clean and happy home"	C "Clean like the dickens"	Cleaning products Benchmark	Kitchen cleaning products Benchmark
Overall appeal	**70%** **B**	60%	63%	34%	31%
Unique	27%	30%	29%	19%	18%
Believable	**55%** **BC**	43%	44%	27%	27%
Persuasive	41%	39%	35%	23%	24%
Attractive	**49%** **B**	36%	44%	N/A	N/A
Memorable	29%	23%	**37%** **B**	23%	23%
Quality	**55%** **B**	42%	51%	N/A	N/A

Chobani: Packaging Design Analysis

Background

Let's say Chobani, a US food company, wanted to redesign their greek yogurt packaging to stand out in an increasingly crowded marketplace.

For this example, we ran a Packaging Design Analysis to test a new, natural looking design against the existing packaging on store shelves.

Goal

To understand if consumers would find the change in packaging design more appealing.

Package A is bright, bold, and focuses on the strawberry flavor

Package B has a natural look, new font, and focuses on "non-fat"

Key insights

1 Consumers found the original bright packaging more appealing, overall.

2 The new natural look scored significantly better for metrics like "stands out", "persuasive", "eye-catching", and "quality".

3 Both packaging designs scored well above the industry benchmarks for food and sweet snacks.

Chobani: Packaging Design Analysis

Sample Size: 1,712
Location: United States
Regions: All regions
Gender Balancing: None
Age: 18-100
Age Balancing: None
Income: $0-$200k+

	A "Bright"	B "Natural"	Sweet snacks Benchmark	Food Benchmark
Overall appeal	90% B	79%	50%	49%
Visually appealing	83% B	61%	38%	38%
Stands out	38%	49% A	42%	42%
Persuasive	36%	54% A	28%	30%
Innovative	58% B	30%	N/A	N/A
Eye-catching	38%	44% A	N/A	N/A
Quality	44%	63% A	43%	41%

Logitech: Product Concept Analysis

Background

Let's say Logitech, a consumer hardware company, was launching a new solar-powered, wireless keyboard, and wanted to understand how it compared to existing lower-cost keyboards.

For this example, we ran a Product Concept Analysis that tested 2 different Logitech keyboards to understand if the new features would resonate with consumers.

Goal

To understand if consumers would favor the fully-featured, environmentally-friendly keyboard, even with a 50% higher price.

Keyboard A is white, uses solar-powered charging plus Bluetooth connectivity

Keyboard B is black with a USB fob to connect the laptop to the computer

Key insights

1 Keyboard A overwhelmingly beat Keyboard B across every attribute tested, despite the higher price point.

2 Given these clear results, there still may be room to increase the price of Keyboard A.

3 Keyboard B was still at or above industry benchmarks for electronics and personal electronics, so could still be a viable option for cost-conscious consumers. Logitech could keep both keyboards in the market to grab more market share from different consumer segments.

Logitech: Product Concept Analysis

A   **B**

Sample Size: 1,140
Location: United States
Regions: All regions
Gender Balancing: None
Age: 18-65
Age Balancing: None
Income: $0-$200k+

|	Keyboard A	Keyboard B	Personal electronics Benchmark	Electronics Benchmark
Overall appeal	**76% B**	57%	44%	42%
Unique	**60% B**	25%	27%	28%
Meets your needs	**54% B**	42%	36%	33%
Persuasive	**46% B**	32%	22%	21%
Innovative	**66% B**	32%	N/A	N/A
Quality	**75% B**	44%	N/A	N/A
Visually appealing	**64% B**	34%	N/A	N/A

How SurveyMonkey Expert Solutions can help

Start

How SurveyMonkey Expert Solutions can help:

Get powerful insights on your creative, product, or marketing concepts before you go to launch. Customize your study using our built-in expert methodology, collect feedback from your target audience, and develop presentation-ready reports automatically.
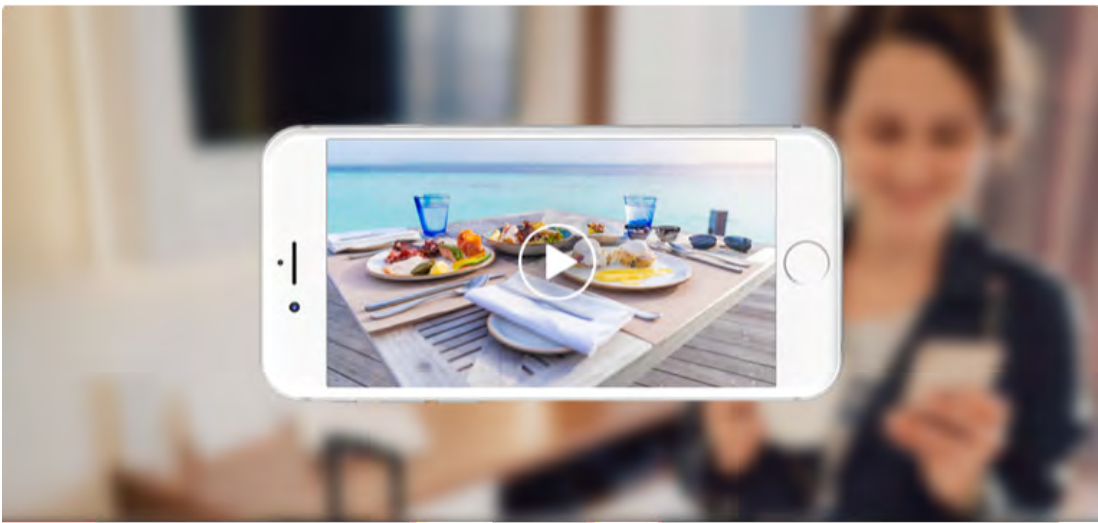
Ad Creative Analysis
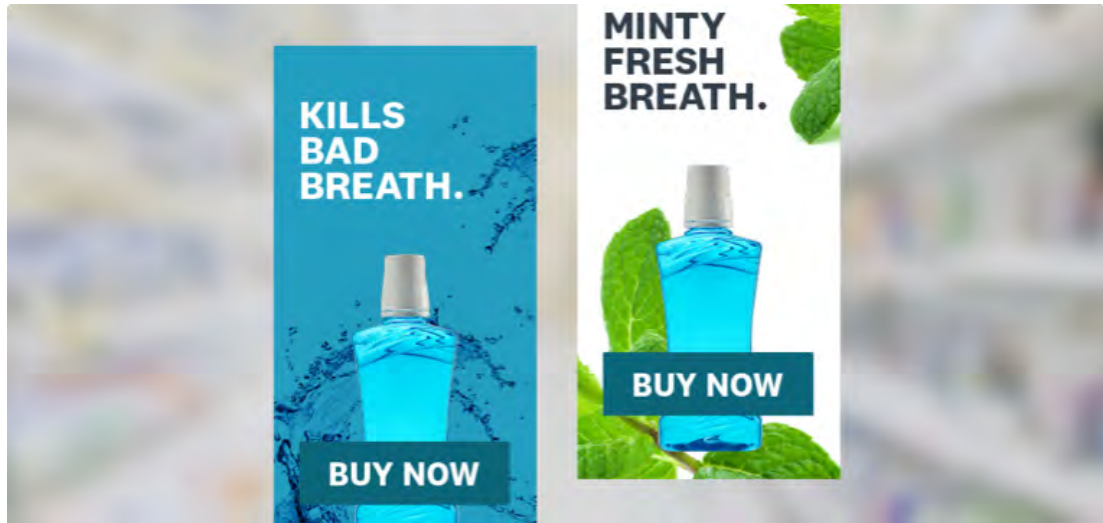
Product Concept Analysis
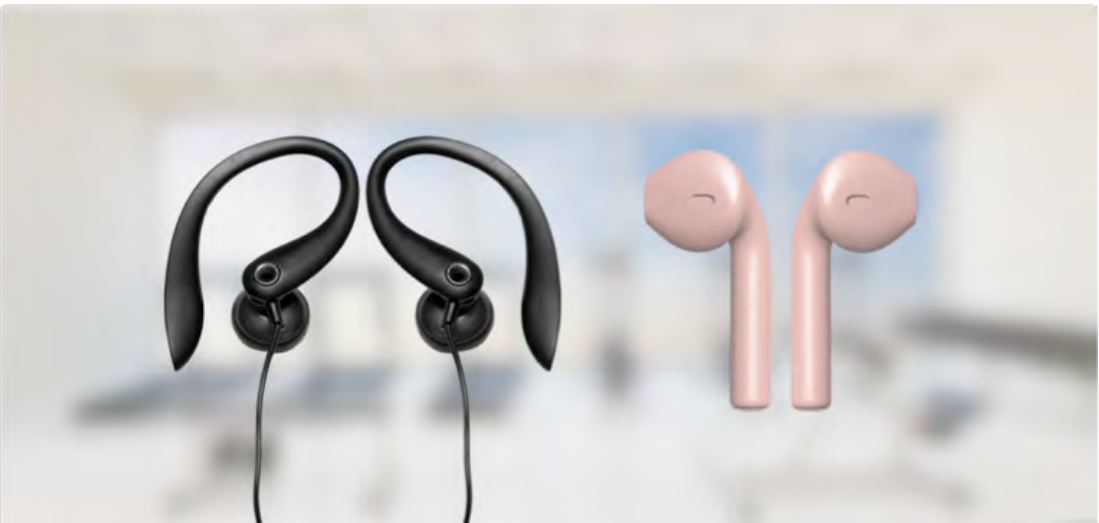
Video Creative Analysis

Packaging Design Analysis

Logo Design Analysis

Brand Name Analysis

Messaging & Claims Analysis

For more information or to talk to a market research consultant,
visit surveymonkey.com/market-research/.