**Concept Test Research Brief Template**

Updated: May 2024

***This is a template for a concept test research brief - the italicized***

***text is intended to provide additional context and examples.***

**BACKGROUND**

*Provide a brief summary of the context of the project:*

* *Who are the key stakeholders?*
* *What is the goal of the marketing campaign?*
* *How will the research insights be used for the marketing campaign?*

*You can copy paste this information from the campaign brief.*

***For example:***

*The State of New Jersey is looking to enable at least 65% of working-age adults to attain a high-quality postsecondary degree/credential by 2025. In support of this goal, the New Jersey State Office of Innovation’s C+E Lab is partnering with Agency X and Agency Y to launch a paid media marketing campaign to drive enrollments of aid-eligible residents in 2-year and 4-year higher education institutions in New Jersey.*

*Messaging angles for the campaign were developed using insights from secondary research and audience research. In support of this campaign, a quantitative concept test will be conducted to identify a messaging winner and ensure it is equitable.*

**RESEARCH OBJECTIVES**

*Specify the goal(s) of conducting the research:*

* *What does the team hope to learn?*
* *What will be the outcome of the research?*

***For example:***

* *Identify the top-performing creative concept for each audience segment and validate that it is equitable in its appeal*
* *Identify the top-performing tagline*
* *Identify the top-performing benefits*

**AUDIENCE SEGMENTS**

*Define the subgroups within the target audience that will be the focus of the research:*

* *What are the defining characteristics of each of the subgroups?*

***For example:***

* *High school students*
* *Adults*
  + *High school graduates but no college degree*
  + *Some college no degree*

**METHODOLOGY**

*Specify the details of the concept test methodology:*

* *What type of design will be used? E.g. monadic vs sequential?*
* *How many concepts will be shown?*
* *How many total responses are required for each concept?*
* *What is the total sample size?*
* *What is the incidence rate?*

***For example:***

* *Quantitative monadic concept test*
* *Assumed incidence rate: 10% incidence rate\* after targeting New Jersey residents ages 16 – 64 whose HHI is under $100,001*
* *Targeting assumptions: Geo-targeted to the State of New Jersey*
* *Number of concepts: 4 concepts per audience segment*
* *Number of visible concepts per respondent: 1 (monadic design)*
* *Sample size: Total n = 2,400, 4 cells at n = 200 per cell*

*Note: We recommend conducting the test via a digital survey platform, such as Surveymonkey, Qualtrics, Alchemy etc..*

***\*Subject to change based on the incidence rate provided to us by the audience panel.***

**STIMULI**

*Provide a brief description of the concepts that will be tested.*

***For example:***

*Written concepts representative of what would be featured in a TV or streaming advertisement, including a tagline.*

**PARTICIPANT SCREENING CRITERIA**

*Specify the criteria participants must meet in order to qualify for the survey. This will inform the screening questions that will be included in the survey.*

***For example:***

* *Must be a resident of New Jersey*
* *Between the ages of 16 - 64 years old*
* *Must have a HHI of up to $100,000*

**AUDIENCE CHARACTERISTICS**

*Define the desired characteristics of the survey sample.*

***For example:***

* *Mix of gender identities (men, women, etc)*
* *Mix of ethnic/racial backgrounds*
* *Educational history:*
  + *Students currently enrolled in a public/charter high school in New Jersey*
  + *Adults whose highest level of education attained is a high school degree*
  + *Adults who have completed some college credit, but not received a degree*

**TIMEFRAME\***

*Provide an estimated timeline for each of the action items of the research.*

***For example:***

* *Set up survey: 3 days*
* *Fielding time: 3 days*
* *Analysis: 4 - 7 days*

***\*Subject to change depending on…***

**METRICS**

*Specify the key metrics the team is interested in assessing to measure success.*

***For example:***

*We will report on how the concepts perform across key attributes including:*

* *Likability*
* *Appeal*
* *Believability*
* *Intent (to enroll)*
* *Equity* 
  + *State priority population (African American/LatinX/American Indian, NJ Dreamers) / historically underserved communities*
  + *Gender*

*We will also report on how the concepts impact perceptions on:*

* *Satisfaction with government support*

**DELIVERABLES**

*List the deliverables stakeholders will receive after the concept test fielding is completed.*

***For example:***

* *Analysis of research findings*
* *Presentation of analysis*