

Example_Research Plan

This example is a discovery-driven approach to conduct customer research and help a water filtration company XYZ enter the US and German markets. The purpose of this discovery research is to develop a customer-centric go-to-market strategy.

SECTION 01: RESEARCH OBJECTIVES

- Identify high-potential customer segments for ultrafiltration products
- Confirm & discover new customer jobs to be done, and how they are currently served
- Discover target customers' key longlist qualifiers and relevant USPs for shortlisting selections (e.g. Made in Germany)
- Understand customer's needs, pains, touchpoints and buying behaviours/journeys
- Map out customer's decision-making process and pull factors
- Define the importance and relevance of brand factor
- Identify and analyse existing/potential sales channels
- Find out the awareness level of water filtration in two markets
- Build a new go-to-market approach and roadmap
- Spot relevant competitors and their sales & marketing strategy
- Validate existing assumptions

Insights Report Outcomes:

- Customer insights in two market (DE & US)
- Target group personas
- Opportunity maps
- Competitor channels/marketing strategy (if relevant)

SECTION 02: QUESTIONS / ASSUMPTIONS

Residential customers

- How aware are people of filtration/ultrafiltration in two markets? What are the factors?
- Why is water filtration important/not important for them?
- How do they perceive their current water filtration system? Pros and cons?
- How do they make a decision to buy/switch water filtration systems?
- Who is the final decision maker in the family? Who and how do we address them in our marketing campaigns?
- How do they perceive brands? To which extent does the brand matter?
- Where do they find information? What do they reply on?

SECTION 03: METHODOLOGY

1. Qualitative Approach (remote interviews)

- Total number of interviewees: 26-32 in 2 markets
- Interview length: 60-75 mins
- Communication: Zoom meeting
- Recruitment: userinterviews.com for the US customers and a local recruitment agency for the German customers

Target segments:

- US Residential: Private Home & Well Owners (10-12)
- GER Residential: Private Home & Well Owners (8-10)

The geographical data like age, gender, income, family status, housing ownership will be collected via emails before the interview is conducted.

Two interview guidelines are prepared:

- 1) For residential customers with filter purchase experience
- 2) For residential customers without filter purchase experience

Recruitment Criteria (Sample Strategy)

- 1) GER residential (8-10), including 3 existing customers.

Criteria 01 Age	Criteria 02 Family & purchase	Criteria 03 Location	Criteria 04 Ownership	Number of interviewees needed
- all interviewees should be above 25 years old. - at least one interviewee in each age group (25-30, 35-40, 45-50, 50-55, 55-60)	- at least half of them have children - at least one of them have elderly members at home - at least 50% of them have purchased any water filtration products before	- half suburbs of cities - half rural areas	Owning a house	4
			Building, renovating or buying a new house	2
			Considering to buy or build a house	1

- 2) US residential (10-12), including 2 existing customers.

Criteria 01 Age	Criteria 02 Family & purchase	Criteria 03 Location	Criteria 04 Ownership	Number of interviewees needed
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- all interviewees should be above 25 years old. - at least one interviewee in each age group (25-30, 35-40, 45-50, 50-55, 55-60)	- at least 50% of them have children - at least one of them have elderly members at home - at least 5-6 of them have purchased a water filtration system in the last 12 months	- half suburbs of cities - half rural areas	Renting a house	2
			Owning a home well	4
			Owning, building, renovating or buying a new house	4
			Considering to buy or build a house	2

2. Quantitative Approach (online survey)

- For the US market, we recommend using WQA 2021 report as our research reference, as the report is very representative with a huge sample size (a total of 1,413 adults over the age of 18 and living in private households were interviewed), and it's in 2021 conducted (January 2021). The report has all the relevant data needed to understand the general consumer trends in the US.
- For the German market, as the residential private customers are much less likely to perceive water problems with limited knowledge of filtration, we suggest applying insights gathered from qualitative interviews as references first before we decide where to focus the best on the quantitative survey (if we need it).