

How to conduct creative concept testing



Before we focus on how to do creative concept testing, it is worth defining what it is, the overall purpose of concept testing and why it can be helpful to do this as a part of your work.

What is concept testing?

Creative concept testing is the process of testing a range of creative concepts or ideas with a sample of the target audience you are aiming to influence and engage with. It enables you to gather their feedback, input or suggestions they have before developing and establishing an overall concept or idea that will successfully engage and connect with the target audience.

What is the overall purpose of concept testing?

The purpose of creative concept testing is to identify the creative concept or idea that will best meet your work objectives and brief, and most successfully promote a key message or call to action with your target audience.

Why should I do creative concept testing?

The right creative concept will effectively communicate the intended key message or call to action with your target audience. Having the right creative concept is the critical link between you and those you are trying to reach. Concept testing is an established method to evaluate and select the most effective concept that will engage and resonate with an intended audience.

How can I conduct effective concept testing?

Conducting effective concept testing can be broken down into stages; which we have laid out in this guidance; from identifying your target audience, through to the refinement of an overall concept.



These are the steps you should take when undertaking creative concept testing:

- 1 Identify your target audience
- 2 Develop initial concept ideas
- 3 Design of initial concept materials
- 4 Select an appropriate testing method or approach
- 5 Develop research tools
- 6 Recruit representative from the target audience
- 7 Conduct the concept testing
- 8 Analyse data and feedback
- 9 Develop recommendations and next steps for concept development
- 10 Refine final concept based on recommendations

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Identify your target audience

While you are likely to already have an overall idea of your target audience for the concepts, such as “students at university”, it can be helpful to drill down further and identify any sub-groups in your audience to ensure you target the most relevant people to take part in testing your concepts, such as sex, age, or other characteristics. So, for “students at university”, do you mean first-year students, PhD students, international students, students in any particular subject area(s), or all of these groups? Not all students are the same. Their values, motivations and behaviours are very different. To help drill down into your audience categories, it can be helpful to do an audience segmentation exercise. See our guide on segmentation to find out more.



In addition, are there any other groups who it would be valuable to test the concepts with?

For example, if you want to test concepts for a “stop smoking campaign”, as well as testing ideas with people who currently smoke, it can also be helpful to test concepts with people who have previous experience of smoking, and health professionals working in stop smoking services.

These groups may provide a supplementary perspective and fresh insights that are still relevant to the target audience. If you are seeking to change behaviour, your target audience might be people who influence the behaviour.

When you are aware of all of the target audience sub-groups and any additional groups, you will then be able to recruit representatives from these groups for participation in the testing stage.

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Develop initial concept ideas

We advise starting this step by undertaking some scoping research on the topic you want to develop concepts for, identifying any previous insights, relevant information and key considerations, to support the development of initial concept ideas.



For example, if your target audience is people who are over 50, you may discover by undertaking research that clear and minimal information is the best approach to engage this audience, and not stereotyping, works well.

These insights should then be used and incorporated into the formulation of a range of concept ideas. To support this creative process, we recommend having as wide a range of perspectives as possible, as this will make it easier to come up with a set of categories for concept ideas. Possible categories of concept ideas can include, but are not limited to; case studies, personalisation, and tapping into emotional responses, such as shock tactics.

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Design of initial concept materials

Once you have an agreed set of categories for concept ideas, these should be used to develop and design concept materials. Again, in designing these materials, any key insights from research should be taken into consideration, such as using any preferred language used by the target audience, using any preferred visual styles, and avoiding any confusing wording and having clear and minimal information in messaging and the call to action.



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Select an appropriate testing method or approach

To select an appropriate method to test concepts and gather feedback from the target audience, you need to consider:

- **The characteristics of the audience**
- **The time-frame**
- **The budget**
- **The level of feedback you require (do you need suggestions for particular elements of materials, or do you simply need to sense-check concepts and find an overall concept preference?)**

The main research methods to test concepts, situations they are most appropriate for and ideal sample sizes are listed below. You might decide to take a 'mixed methods' approach which is a combination of the different methods.



Focus group

A group discussion focused on the concepts, guided by a facilitator. This can be conducted in person or online. This method works well in testing emotional responses and reactions to concepts, making suggestions for improving concepts and generating any new concept ideas. The ideal sample size is usually 7 to 12 people. See our guide on 'how to conduct a focus group'.



In-depth interviews

A group discussion focused on the concepts, guided by a facilitator. This can be conducted in person or online. This method works well in testing emotional responses and reactions to concepts, making suggestions for improving concepts and generating any new concept ideas. The ideal sample size is usually 7 to 12 people. See our guide on 'how to conduct a focus group'.

Intercept study

One-to-one discussions between the interviewer and participants, conducted in locations participants go to; such as store locations, libraries, or places in town or city-centres. These can only be conducted in person. This method works well for testing very specific elements of concepts, such phrasing of a call to action. The ideal sample size is a minimum 60 participants, maximum 300 participants.



Surveys or questionnaire

Surveys consisting of mostly close-ended questions are completed by participants. These can be conducted in-person, by email, online or post. This method works well to attain feedback from a larger sample (often across different location) within a short timeframe, and to gather feedback to sense-check concepts and understand reactions to concepts, rather than attain suggestions for improvements or new ideas. The ideal sample size is 20 – 200 participants.

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Develop research testing tools

Once the testing method has been decided upon, you should create research tools to carry out your method in practice. So, if you have decided to hold focus groups, this will be a discussion guide, if interviews and intercept studies, it will be a script; or if surveys, this will be your self-completion survey questionnaire.

To gather relevant and meaningful feedback, you should ensure the research tool supports you to gather information on the specific elements of the concepts you want to test.

For example, do you want to check the strength of the call to action, particular phrasing, how inclusive the key messages or imagery are, or whether the use of colour or layout design overall is appealing?

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Recruit representatives from the target audience

You should aim to recruit a representative sample from the intended audience by advertising the event through communication channels and contacts that effectively reach your audience.

For example, to recruit students you could contact University Student Unions and University Communications teams, but to recruit new Mothers and young families, any relevant Mother and Baby community group, any contacts through perinatal care clinics, or other healthcare professionals would be most appropriate.



Make sure you build in plenty of time for recruitment – this is in fact one of the hardest tasks as it can take some time to set up.

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Conduct creative concept testing

Before starting the concept testing session, you may decide to audio-record the session, as this will allow you to listen back over what was said to use all of what was discussed in later analysis. However, before you do this, it is important to ask permission from each participant to record them, so be sure to ask before starting your session fully.

To fully start the session, using an “icebreaker” such as general questions on the topic you are testing can help settle people in and focus their minds towards thinking about what you are wanting to test.

If you want to start the creative concept testing by finding out about people’s initial reactions to the concepts, it can help to ask them a question as you show them a concept, such as; “what do you feel when you see this concept?”. However, it is important that during the rest of the concept testing, people are allowed time to look over and review each concept before asking them for feedback and answer your questions. This will give them time to process what they are being shown, consider their thought and provide more detailed feedback.



You may find it helpful to do additional activities, such as ranking concepts in order of preference, or probing specific areas further based on what they say. **For example**, if someone responds that they don’t like a particular wording, ask what they would suggest in its place.

At the close of the session, you should ensure that the concept materials are gathered up, and check if participants have any additional questions or points they wish to make in relation to the concepts or the topic in general.

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Analyse data and feedback

A good starting point is to gather together and review all of the feedback. Start by listening back to any recordings you have from the concept testing. You may choose to make notes as you listen, or transcribe fully those sessions. If you made any other notes during or just after the sessions, look over those as well. As you review these notes and transcriptions, start to pick up any frequently made comments, strong opinions and overall preferences and things that could be changed or improved about the concepts. Write up these notes and any additional comments that emerge as relevant to form key insights.

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Develop recommendations and next steps for concept development

From these key insights, you should be able to make a decision on which concept to take forward, based on a consensus of feedback from the concept testing. These key insights should then be used to generate the recommendations for how to further develop and refine the concept. If you are not the designer, you will need to clearly communicate this to the creative team. We always like to have a designer involved in the creative concept testing as we feel it is important for him / her to hear from the target audience directly.

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Refine final concept based on recommendations

When you have agreed on a way forward and you have a set of recommendations you need to refine and fully develop the initial concepts into one final concept, perhaps through changing the colour, layout or photos and images used, adapting wording or phrasing to soften or strengthen a key message, or including more information to clarify the communication.

When you have one final concept, it is good practice to run it past your target audience again if budget permits. When you have a final concept that meets your initial aims and the audience resonate with the concept, you are now ready to sign this off and adapt it for a range of communications and marketing collateral such as posters, leaflets, social media posts, and other materials.

