RESEARCH ROCKSTAR

SCOPE & METHODOLOGY CHECKLIST FOR QUANTITATIVE RESEARCH REPORTS

The "Scope & Methodology" section (sometimes just called "Methodology") is where market researchers establish the study's credibility and mitigate the risk of misinterpretation. Clear and concise details about the population (sample), data collection (method), and timing (recency) reflect the research design's rigor. Use this checklist to make sure you have a complete Scope & Methodology section. While not all items apply to every quantitative research project, professional market researchers should know when to use all of them.

TOPIC		ITEM	DESCRIPTION/EXAMPLE(S)
Research Objectives	☐	The objectives that were documented at project initiation	State the objectives precisely, and if any modifications were made post project kick-off, document it. If the research was designed to test specific hypotheses, state them.
Research Design	☐	A high-level summary statement about the research design	If the research is one phase of a multi-phased research project, specify the phases and the order in which they occurred. For example, you may have had a qualitative phase 1 using focus groups and followed with a phase 2 of survey research.
Data Collection: Survey	☐	Data collection mode(s)	Intercept, Online, On-site, Phone, Postal, or a combination (be specific).
	☐	Sampling	Sample Source, Screeners, Quotas, Response Rate, Use of Reminders, Incentive Details.
	☐	Sample size (total, and if important, by subgroup)	Conventionally stated as "n=X". For example, "n=500 US consumers with 2 or more children in the home"[1], or, more formally, "… a nationally representative sample of 1,900 adults (ages 18+) in the United States and District of Columbia." If a multi-mode approach was used, specify sample size per mode.
	☐	Locations/geo-graphic scope	If your research was only conducted in specific areas, state that. For example: "Data collection focused on urban and suburban areas; rural areas are not represented." If your research was multinational, be precise about the per country sampling.
	☐	Timing	When the data collection started and concluded.

[1] Avoid this common mistake: it is incorrect to describe your sample size as "N=x". Capital N refers to the population size. Lower case n refers to sample size. Unless you are doing a census, you will state "n=x."

TOPIC		DETAIL	DESCRIPTION/EXAMPLE(S)
Data Collection: Survey	☐	Margin of error statement (brief or extensive)	Example of brief statement: The margin of error is ± 1.6 at a 95% Confidence Interval. Example of extensive statement: "The unweighted national online sample is n=1,407 interviews completed in English or Spanish from September 8 to September 22, 2021. Weighting was used to correct for known demographic divergences based on demographic information from the U.S. Census Bureau. The margin of error for the sample is ± 2.3 percentage points at a 95% Confidence Interval."
Data Source: Customer Database	☐	Sample size	Number of records included in the analysis.
	☐	Variables	Examples of key variables and whether they are absolute or derived.
	☐	Data quality	Data quality statemen, such as how often records are updated.
Less Common Items to Use if Applicable	☐	Description of segments	If the research was executed with segment-specific analysis, describe the segments briefly. Example: "The research includes analysis by the existing 5-group segmentation model: Business travelers, Family vacation travelers, Solo Travelers over 50, Solo Travelers under 50, and Romance Travelers."
	☐	Use of translation	If the questionnaire was translated, state the languages used for data collection and whether open-ended responses were also translated.

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