**CBM Questionnaire© Template**

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**Background**

This template for a Category Buyer Mindset (CBM) tracking questionnaire is designed drawing on best practices for metrics and measurement that will be outlined my book Better Brand Health.

There are adaptions for different category types, just delete that not relevant to you.

Cheers

Jenni

**Notes on formatting:**

**Programming instructions are in purple**

SR = Single Response, MR = Multiple response

Text to respondents are in normal black text, **points of emphasis in bold**

*Respondent instructions are in italics*

**Question codes**

TRANS = Transaction categories

DUR = Durable categories

SERV = Service categories

If there is no question code it is applicable to any categories

Notes to questionnaire designers are in orange

**Introduction – greeting to respondents, expectations, and reassurance of any necessary privacy protocols**

**CATEGORY SCREENERS**

**Screening section**

This section aims to identify appropriate respondents to complete the questionnaire. Include screening or quota questions such as gender, age, location, or decision making or occupation

**MR, RANDOMISE EXCEPT NONE OF THESE, TERMINATE IF SQ1CATBUYTRANS ≠ 1**

|  |  |
| --- | --- |
| SQ1CATBUYTRANS: In the **last <insert longer time frame>,** have you bought ….?  *Select all that apply* | **CODE** |
| Target category | 1 |
| Distractor category | 2 |
| Distractor category | 3 |
| Distractor category | 4 |
| None of these | 99 |

**MR, IMPORT IF TICKED AT SCREENQ1CATBUYING** **RANDOMISE EXCEPT NONE, TERMINATE IF SQ2CATBUYTRANS ≠ 1**

|  |  |
| --- | --- |
| SQ2CATBUYTRANS: In the **last <insert target time frame>,** have you bought any of the following categories?  *Select all that apply* | **CODE** |
| Target category | 1 |
| Distractor category | 2 |
| Distractor category | 3 |
| Distractor category | 4 |
| None of these | 99 |

**MR, RANDOMISE EXCEPT NONE OF THESE, TERMINATE IF SQ1CATBUYDUR ≠ 1**

|  |  |
| --- | --- |
| SQ1CATBUYDUR: Do you currently own any of the following ….?  *Select all that apply* | **CODE** |
| Target category | 1 |
| Distractor category | 2 |
| Distractor category | 3 |
| Distractor category | 4 |
| None of these | 99 |

**MR, RANDOMISE EXCEPT NONE OF THESE, TERMINATE IF SQ1CATBUYSERV ≠ 1**

|  |  |
| --- | --- |
| SQ1CATBUYSERV: Do you have any of the following ….?  *Select all that apply* | **CODE** |
| Target category | 1 |
| Distractor category | 2 |
| Distractor category | 3 |
| Distractor category | 4 |
| None of these | 99 |

**BRAND AWARENESS**

Use logos/pack images and names where possible

**MR**

|  |  |
| --- | --- |
| BRANDAWARENESS: Which of the following brands have you heard of before today?  *Select all that apply* | **CODE** |
| Brand list in alphabetical order | 1 |
|  | 2 |
|  | 3 |
|  | 4 |
| None of these | 99 |

**BRAND ATTRIBUTES**

**INTRO PAGE - SHOW TO ALL**

|  |
| --- |
| Next, you will see some statements that people have linked to brands of <**INSERT CATEGORY DESCRIPTOR**>.  Please review each statement and indicate which, if any, of the listed **brands** you associate with that statement. You can select as many or as few **brands** as you like.  It does not matter if you have actual experience with that particular **brand** or not; it is your opinion we are interested in. |
| **Continue** |

**MR PER EACH STATEMENT, ONE STATEMENT PER SCREEN, STATEMENT IN BOLD**

|  |
| --- |
| Q1BRANDATTRIBUTE: Which of these <**INSERT CATEGORY DESCRIPTOR**> do you link with the following statement?  Remember that you can select as many or as few as you like, or none of these, if none are relevant to the statement.  **[INSERT ATTRIBUTE]**  *Please select as many as apply* |

The brand list should include:

-All bigger share brands

-Any individual private labels with substantive share

-Medium share brands

-A representative set of small brands, including your brands if not in the bigger or medium brands.

**BRAND LIST AS BUTTONS, RANDOMISE, ANCHOR ‘NONE OF THESE’ AT END**

|  |  |  |  |
| --- | --- | --- | --- |
| **BRAND** | **CODE** | **BRAND** | **CODE** |
|  | 1 |  | 11 |
|  | 2 |  | 12 |
|  | 3 |  | 13 |
|  | 4 |  | 14 |
|  | 5 |  | 15 |
|  | 6 |  | 16 |
|  | 7 |  | 17 |
|  | 8 |  | 18 |
|  | 9 |  | 19 |
|  | 10 |  | 20 |
|  |  | None of these | 99 |

**ATTRIBUTE LIST RANDOMISE**

Ratio of 60-70% CEPs, 30-40% other attributes

Remember wording guides for attributes, no strong, comparison or superlative phrases

|  |  |
| --- | --- |
| **CEP** | **CODE** |
|  | 1 |
|  | 2 |
|  | 3 |
|  | 4 |
|  | 5 |
|  | 6 |
|  | 7 |
|  | 8 |
|  | 9 |
|  | 10 |
|  | 11 |
|  | 12 |
|  | 13 |
|  | 14 |
|  | 15 |
|  | 16 |
|  | 17 |
|  | 18 |
|  | 19 |
|  | 20 |
|  | 21 |
|  | 22 |
|  | 23 |
|  | 24 |

**BRAND ATTITUDE**

Adapt wording to match the category and the buyer experience. The brand list should initially include all brands from Q1BRANDATTRIBUTE plus any brands of interest not able to be included in the attribute brand list, particularly any new launches.

**ASK ALL, USE BRAND LIST FROM QBRANDATTRIBUTE, RANDOMISE ORDER**

|  |  |
| --- | --- |
| QBRANDATT1: Which of the following statements best matches how you feel about this brand?  *Select one answer in each row* | **CODE** |
| Strong positive e.g, I love it/it’s my favourite | 1 |
| Mild positive e.g, It’s among the ones I prefer | 2 |
| Ambivalent but one to purchase e.g, It’s not one I’d usually consider buying, but I would if no other option was available | 3 |
| Rejection e.g, I would refuse to buy this brand | 4 |
| Neutral/no attitude e.g, I have no opinion about this brand | 5 |

**ASK IF QATT1=4 FOR ANY BRAND. REPEAT IN LOOP FOR EACH BRAND WITH CODE 4 IN QATT1**

**IF BLANK, SHOW ERROR MESSAGE: “Please enter a response. If you cannot think of any answer, please type in ‘Don’t know’.”**

|  |  |
| --- | --- |
| QBRANDATT2: Thinking about [INSERT BRAND NAME from ATT1], why would you refuse to buy this brand?  *Please your response below* | **CODE** |
| **OPEN ENDED TEXT BOX 3 LINES DEEP** | <open> |

**WORD-OF-MOUTH**

Set this up to check WOM levels are normal and decide whether ongoing tracking is needed.

**ASK ALL MR**

|  |  |
| --- | --- |
| QWOMBRAND1a: Has someone you know (e.g., friend, family member, work colleague) **shared something positive** about any of these brands in the **last <insert timeframe>**?  *Please tick as many responses as needed* | **CODE** |
| **Insert brand list from Q1** | 1 |
|  | 2 |
|  | 3 |
|  | 4 |
|  | 5 |
| None of these | 99 |

**ASK ALL MR**

|  |  |
| --- | --- |
| QWOMBRAND1b: Has someone you know (e.g., friend, family member, work colleague) **shared something negative** about any of these brands in the **last <insert timeframe>**?  *Please tick as many responses as needed* | **CODE** |
| **Insert brand list from Q1** | 1 |
|  | 2 |
|  | 3 |
|  | 4 |
|  | 5 |
| None of these | 99 |

**ASK ALL MR**

|  |  |
| --- | --- |
| QWOMBRAND2a: Have **you** **shared something positive** about any of these brands in the **last <insert timeframe>** to people you know (e.g., friends, family members, work colleagues)?  *Please tick as many responses as needed* | **CODE** |
| **Insert brand list from Q1** | 1 |
|  | 2 |
|  | 3 |
|  | 4 |
|  | 5 |
| None of these | 99 |

**ASK IF TICKED FOR QWOMBRAND2a, PULL DOWN MENU 1 TO 5+ TIMES**

|  |  |
| --- | --- |
| QWOMBRAND2b: On how many occasions have you shared something positive about each brand **in the last <insert timeframe>**?  *Please put a response for each brand* | **CODE** |
| Insert brand list | <pull down> |
| Insert brand list | <pull down> |

**ASK ALL MR**

|  |  |
| --- | --- |
| QWOMBRAND3a: Have **you** **shared something negative** about any of these brands in the **last <insert timeframe>** to people you know (e.g., friends, family members, work colleagues)?  *Please tick as many responses as needed* | **CODE** |
| Insert brand list from Q1 | 1 |
|  | 2 |
|  | 3 |
|  | 4 |
|  | 5 |
| None of these | 99 |

**ASK IF TICKED FOR QWOMBRAND3a, PULL DOWN MENU 1 TO 5+ TIMES**

|  |  |
| --- | --- |
| QWOMBRAND3b: On how many separate occasions have you shared something negative about each brand in the **last <insert timeframe>**?  *Please put a response for each brand* | **CODE** |
| Insert brand list | <pull down> |
| Insert brand list | <pull down> |

**BRANDED REACH OF MARKETING ACTIVITIES**

Repeat for each execution that can be unbranded, need at least one competitor execution for each of your brands to mix up options.

**ASK ALL**

|  |  |
| --- | --- |
| QREACH: Have you seen the following image or something similar, in an advertisement recently?  *Please tick a response* | **CODE** |
| Yes | 1 |
| No | 2 |

**ASK IF QREACH=1, OPENENDED TEXT BOX 3 LINES**

|  |  |
| --- | --- |
| QBRANDING: Which brands do you remember from the advertising?  *Please enter brands below, if more than one brand please put each in a separate box* | **CODE** |
| Type in response | <open> |
| Type in response | <open> |
| Type in response | <open> |
| Don’t know | 99 |

Repeat for each execution that can’t be unbranded, again need a mix of your brand(s) and competitors. This approach can also be adapted for capturing reach on other owned media such as social media or websites.

**ASK ALL**

|  |  |
| --- | --- |
| QREACH: Have you seen the following image or something similar, in an <insert media if useful> recently?  *Please tick a response* | **CODE** |
| Yes | 1 |
| No | 2 |

**CATEGORY AND BRAND BUYING**

The response codes should be varied according to category purchase frequency and any grouping of higher frequencies should consider common rounding and rate-based errors likely to be associated with the target time frame (e.g., 4 and 8 if referring to months).

Remember the aim is to get a measure to separate out lighter from heavier category buyers.

**ASK ALL, SR**

|  |  |
| --- | --- |
| QCATEGORYBUYINGTRANS: How often have you bought **<Insert category>** in the last **<Insert time frame consistent with SQ2CATBUYTRANS>?**  *Select one answer* | **CODE** |
|  | 1 |
|  | 2 |
|  | 3 |

**ASK ALL, SR**

|  |  |
| --- | --- |
| QCATEGORYBUYINGDUR: In the last **X** years, how many time have you bought **<insert category>**?  *Select one answer* | **CODE** |
|  | 1 |
|  | 2 |
|  | 3 |

**ASK ALL, SR**

|  |  |
| --- | --- |
| QCATEGORYBUYINGSERV: In the last **X** years, how many times have you bought **<insert category>**?  *Select one answer* | **CODE** |
|  | 1 |
|  | 2 |
|  | 3 |

Remember the aim is to get brand penetration to classify brand buyers and non-buyers, the brand list should include all brands from the brand attribute list and can include any other new or small brands not able to be included in that list.

**ASK ALL MR**

|  |  |
| --- | --- |
| BRANDPENTRANS1: Which of the following brands have you bought **in the last <insert longer timeframe>**?  *Select all that apply* | **CODE** |
| Insert brand list in alphabetical order | 1 |
|  | 2 |
|  | 3 |
|  | etc |
| Other (please specify) | <open> |
| None of these | 99 |

**IMPORT IF TICKED AT BRANDPENTRANS1**

|  |  |
| --- | --- |
| BRANDPENTRANS2: Which of the following brands have you bought i**n the last <insert target timeframe>**?  *Select all that apply* | **CODE** |
| Insert brand list in alphabetical order | 1 |
|  | 2 |
|  | 3 |
|  | etc |
| None of these | 99 |

**IMPORT IF TICKED AT BRANDPENTRANS2, SCALE 1,2,3,4,5,6,7,8,9,10, 11+**

|  |  |
| --- | --- |
| BRANDPENTRANS3: How many times have you bought each the following brands have you bought i**n the last <insert target timeframe>**?  *Select one response for each brand* | **CODE** |
| Insert brand list in alphabetical order | 1 |
|  | 2 |
|  | 3 |
|  | etc |
| None of these | 99 |

**ASK ALL SR**

|  |  |
| --- | --- |
| BRANDPENDUR1: Which brand do you currently own for **<insert category>**?  *Select one response* | **CODE** |
| Insert brand list in alphabetical order | 1 |
|  | 2 |
|  | 3 |
|  | etc |
| Other (please specify) | <open> |
| None of these | 99 |

**ASK ALL SR**

|  |  |
| --- | --- |
| BRANDPENDUR2: How long have you been a customer of <insert brand from BRANDPENDUR1> for **<insert category>**?  *Select one response* | **CODE** |
| In the last 12 months | 1 |
| Over 12 months to less than 3 years | 2 |
| 3 years to less than 5 years | 3 |
| 5 years or more | etc |

**ASK ALL SR**

|  |  |
| --- | --- |
| BRANDPENSERV1: Which brand are you a customer for **<insert category>**?  *Select one response* | **CODE** |
| Insert brand list in alphabetical order | 1 |
|  | 2 |
|  | 3 |
|  | etc |
| Other (please specify) | <open> |
| None of these | 99 |

**ASK ALL SR**

|  |  |
| --- | --- |
| BRANDPENSERV2: How long have you been a customer of <insert brand from BRANDPENSERV1> for **<insert category>**?  *Select one response* | **CODE** |
| In the last 12 months | 1 |
| Over 12 months to less than 3 years | 2 |
| 3 years to less than 5 years | 3 |
| 5 years or more | etc |

**ASK ALL SR**

|  |  |
| --- | --- |
| BRANDPENSERV3: Which brand did you use prior to <insert brand from BRANDPENSERV1>?  *Select one response* | **CODE** |
| Insert brand list in alphabetical order | 1 |
|  | 2 |
|  | 3 |
|  | etc |
| Open (please specify) | <open> |
| No other brand | 99 |

**REPEAT BRANDPENDUR1 OR BRANDPENSERV1 FOR EACH RELEVANT SUBCATEGORY**

**FINAL DEMOGRAPHICS**

ADD IN RELEVANT DEMOGRAPHICS

**THANK AND TERMINATE**