Kenya Toothpaste Shopper Decision Study

Toothpaste Shopper

24-027132-01

June 2024

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Questionnaire:

* Introduction and demographic information
* Brand understanding
* Last purchase (setting the stage)
* Pre- and in-store touchpoints
  + Self-initiated (pull) touchpoints
  + Imposed (push) touchpoints
* In-store (offline)
* Role of touchpoints
* The in-store decision making for the brand
* Overall evaluation of the past to (last) purchase
* The broader context of the shopping trip
* Post-purchase touchpoints
* General oral care usage



Contact: Danielle Crouch

Email: [danielle.crouch@ipsos.com](mailto:danielle.crouch@ipsos.com)

Tel: 011 709 7800

TARGET GROUP

18+ years old

50% Male – 50% Female

Toothpaste users

**SEC A-D (quota-controlled)**

Split across Traditional vs Modern Trade

|  |  |  |
| --- | --- | --- |
| Main Channel | Sub Channel | Tanzania |
| Indirect | **Duka/House Shop etc** | 120 |
| **Mini Mart** | 100 |
| **Total** | **220** |
| Modern |  | **180** |
| Total |  | 400 |

Regions

Major metros across both countries (natural fall-out)

Sample size:

n= 400. Additional split as per channel requirements

INTRODUCTION AND DEMOGRAPHIC INFORMATION

Good morning/ afternoon/ evening. My name is….and I work for Ipsos, an independent market research organization. We are conducting a survey on consumer products including, personal and oral care. This will take approximately 30-40 minutes. The answers you give will form part of a confidential market research study. They will be analyzed along with those of many others and will never be linked back to you personally. The results will be used solely for the purposes of this market research study.

Some questions can be sensitive in nature. We would like to remind you that your participation is strictly voluntary and that your responses are used for research purposes only.

Please note only the aggregated data (sum of combined responses) is shared with the client.

Would you be willing to take part in this research?

|  |  |  |
| --- | --- | --- |
| Yes | 1 | CONTINUE |
| No | 2 | THANK RESPONDENT AND CLOSE INTERVIEW |

PROG: ASK ALL. SINGLE MENTION.

PROG: IF CODE 2 SELECTED (No), PLEASE TERMINATE

Today we are looking for people who work in certain types of jobs. Do you or any member of your family or close friends work in any of these areas?

|  |  |  |
| --- | --- | --- |
| A Marketing, Advertising or Public Relations company | 1 | THANK RESPONDENT AND CLOSE INTERVIEW |
| A Marketing Research or Marketing Consulting company | 2 |
| Any Media: Print, TV, radio or internet company | 3 |
| Any toothpaste/toothbrush or oral care company | 4 |
| None of these | 5 | CONTINUE |

PROG: ASK ALL. SINGLE MENTION.

PROG: IF CODE 1-4 SELECTED, PLEASE TERMINATE

YEAR/MONTH. What is your date of birth?

* YEAR
* \_1910 1910
* ...
* \_2015 2015
* MONTH
* \_1 January
* \_2 February
* \_3 March
* \_4 April
* \_5 May
* \_6 June
* \_7 July
* \_8 August
* \_9 September
* \_10 October
* \_11 November
* \_12 December

RESP\_AGE [Hidden]. Hidden Question - RESP\_AGE "this is a dummy question that will hold age"

* USE RESP\_AGE [Hidden] response list

QUOTAGERANGE [Hidden]. Hidden Question - QUOTAGERANGE "this is a dummy question that will hold age breaks" for the quotas that should be defined by the PM; it CAN be edited and lines can be added to meet survey objectives.

* \_18\_24 "18-24",
* \_25\_34 "25-34",
* \_35\_44 "35-44",
* \_45\_55 "45-55",
* \_56\_65 "55-65"
* \_+66

RESP\_GENDER. Are you…?

PROG: SINGLE MENTION

* \_1 Male
* \_2 Female

NATIONALITY: What is your nationality?

PROG: ASK ALL. SINGLE MENTION.

PROG: IF CODE 98 SELECTED (OTHER), PLEASE TERMINATE

* \_1 **Kenyan**
* \_98 Other

REGION: Which region do you live in?

PROG: ASK ALL. SINGLE MENTION.

PROG: IF CODE 98 SELECTED (OTHER), PLEASE TERMINATE

* Nairobi
* **Mombasa**
* **Kisumu**
* 98 (Other)

URBANITY: Please confirm the type of area you live in?

PROG: ASK ALL. SINGLE MENTION.

INTERVIEWER NOTE: PLEASE ENSURE SPREAD ACROSS WITHIN THE DIFFERENT REGIONS

**INTERVIEWER NOTE: DO NOT ASK RESPONDENT – INTERVIEWER TO GUIDE BASED ON WHERE THEY ARE**

* Peri-urban
* Urban
* Rural

ZA01MAR. What is your marital status?

PROG: SINGLE MENTION

* \_1 Never married
* \_2 Married
* \_3 Widowed
* \_4 Divorced
* \_5 Separated

EMP01. What is your current employment status?

PROG: SINGLE MENTION

* \_1 Employed full-time
* \_2 Employed part-time
* \_3 Self employed
* \_4 Unemployed but looking for a job
* \_5 Unemployed and not looking for a job/Long-term sick or disabled
* \_6 Full-time parent, homemaker
* \_7 Retired
* \_8 Student/Pupil

S2 " I will ask you few questions about your living standard. I will read out few statements to you and I would like you to tell me if they relate to you. Do you have ...?

Some of these things might sound strange to you, but we need to ask them to understand a bit more about your lifestyle. Answer Yes or No. Which of the following items do you have your house? Single code

|  |  |  |
| --- | --- | --- |
|  | Yes | No |
| Do you have a colour TV? | +18 | 0 |
| Did you access the internet during the past 4 weeks? | +49 | 0 |
| Do you have a satellite dish / DSTV / cable TV subscription? | +34 | 0 |
| Do you have a built-in kitchen sink in your kitchen? | +31 | 0 |
| Do you have a microwave oven? | +32 | 0 |
| Did you read a newspaper in the last 7 days? | +17 | 0 |
| Do you have a video recorder? | +18 | 0 |
| Do you have a cell phone/mobile phone with a working line? | +16 | 0 |
| Do you have an electric iron? | +17 | 0 |
| Do you have a personal computer for your own personal use at home? | +34 | 0 |
| Do you have a fixed telephone line at home or an outstanding application for one? | +14 | 0 |
| Did you watch TV in the last 7 days? | +17 | 0 |
| Do you have access to e-mail? | +41 | 0 |
| Do you have an automatic washing machine? | +32 | 0 |
| Do you have refrigerator? | +20 | 0 |
| Do you have a hi-fi or music centre? | +17 | 0 |
| Do you have a free-standing deep freezer? | +19 | 0 |
| Do you have a video camera/camcorder? | +35 | 0 |
| Do you have an account with a commercial bank? | +15 | 0 |
| Do you live in a house, cluster house or condominium | +11 | 0 |
| How many cars do you have in your household? |  |  |
| None | 0 | 0 |
| One | +12 | 0 |
| Two or more | +24 | 0 |
| Did you buy adult clothing in the past six months? | +10 |  |
| Add constant | +32 |  |

Program to sum the scores and display respondent SEC.

|  |  |  |
| --- | --- | --- |
|  | LSM Group | SEC |
| Up to  37 | 1 | D E |
| 38 - 54 | 2 |
| 55 - 70 | 3 |
| 71 - 87 | 4 |
| 88  - 103 | 5 | C2 |
| 104 - 120 | 6 |
| 121 - 153 | 7 |
| 154  - 186 | 8 | C1 |
| 187  - 219 | 9 |
| 220  - 252 | 10 |
| 253 - 285 | 11 |
| 286 - 318 | 12 | AB |
| 319 - 352 | 13 |
| 353 - 385 | 14 |
| 386 - 418 | 15 |
| 419  - 451 | 16 |
| 452 - 999 | 17 |

PROG: IF CODE 6 SELECTED, TERMINATE

Number of people in household

S3. How many people live in your house?

|  |
| --- |
| [PROG: RANGE 1-50] |

S4a. Which of the following categories have you purchased in the past three months?

PROG: MULTIPLE RESPONSE. RANDOMISE LIST

PROG: IF CODE 1 NOT SELECTED, TERMINATE

PROG: CODE 99 SHOULD BE ANCHORED AND IS MUTUALLY EXCLUSIVE. IF CODE 99 SELECTED, TERMINATE

1: Oral care products

2: Hair care products

3: Body cleansing products

4: Household cleaning products

99: None of the above

S4b. Who in your household decides which oralcare products to buy?

PROG: SINGLE MENTION

PROG: IF CODE 1 or CODE 2 IS SELECTED, continue, else TERMINATE

* + - 1. Myself mainly/occasionally someone else
      2. Equally myself and someone else
      3. Mainly someone else, occasionally myself
      4. Nearly always/always someone else
      5. Don’t know

S4c. Which specific oral care products did you purchase in the past three months?

PROG: MULTIPLE RESPONSE. RANDOMISE LIST

PROG: IF CODE 1 NOT SELECTED, TERMINATE

PROG: CODE 99 SHOULD BE ANCHORED AND IS MUTUALLY EXCLUSIVE. IF CODE 99 SELECTED, TERMINATE

1: Toothpaste

2: Dental floss

3: Mouthwash

4: Toothbrush

99: None of the above

S4d. Where did you most recently purchase your toothpaste from?

PROG: SINGLE RESPONSE. RANDOMISE LIST

PROG: CODE 99 SHOULD BE ANCHORED AND IS MUTUALLY EXCLUSIVE. IF CODE 99 SELECTED, TERMINATE

1: Duka/house shop (QUOTA: n=120)

2: Mini mart (QUOTA: n=100)

3: Bigger retail stores (QUOTA: n=180)

99: None of the above

HIDDEN VARIABLE:

* IF CODE 1 OR 2 IS SELECTED – DEFINE AS INDIRECT TRADE SHOPPER
* IF CODE 3 IS SELECTED – DEFINE AS MODERN TRADE SHOPPER

Number of toothbrushes in household

S5 How many toothbrushes do you have in your household?

|  |
| --- |
| [PROG : textbox RANGE 0-50] |

Toothpaste replacement understanding

S6. How often do you replace your or your family members’ toothbrushes?

PROG: SINGLE RESPONSE

1: Once a month

2: Once every three months

3: Once every 6 months

4: Once a year

5: Once every two years

6: Haven’t replaced a toothbrush in two or more years

SECTION A: BRAND UNDERSTANDING

[PROG: SHOW TEXT BELOW ON TRANSITION SCREEN]

In this survey, we would like to ask you some questions about toothpaste.

UNAIDED 1st MENTION

A1\_1 Thinking about toothpaste, which brand comes to mind first?

PROG: OPEN ENDED TEXT BOX

PROG: SA

PROG: ASK ALL RESPONDENTS

UNAIDED OTHER MENTIONS

A1\_2. What OTHER brands of toothpaste do you know, even if only by name? Any others? Please enter one brand name per field.

PROG: MULTIPLE OTHER SPECIFY. PLEASE PROVIDE 5 SEPARATE FIELDS\*\* ALL 5 RESPONSES DO NOT NEED TO BE FILLED IN

PROG: ASK ALL RESPONDENTS

AIDED AWARENESS

A2. Which brands of toothpaste have you ever heard of?

Please select the answer that applies.

1. Aquafresh
2. Closeup
3. Colgate
4. Dabur
5. Oral-B
6. Sensodyne
7. Whitedent
8. Pepsodent
9. T-Guard
10. Paradontax

[PROG: RANDOMISE LIST]

98: Other brand (specify) [PROG: SPECIFY; GRID OE (Unbound list); AUTOMATICALLY CREATE OE BOX IF FILLED]

99: Don’t know [PROG: ANCHOR; EXCLUSIVE]

[PROG:

* MULTIPLE RESPONSE
* CODE 98 IS OTHER SPECIFY, ALWAYS IN THE END
* PULL IN LOGOS AS PER EXCEL EXCLUDING BRAND NAMES
* TERMINATE IS CODE 99 – DON’T KNOW

A3 Which of these brands of toothpaste have you ever bought? (select all that apply)

PROG: MA.

PROG: RANDOMIZE BRANDS

PROG: SHOW BRANDS SELECTED IN A2 – pull in other specify as well

Please select the answer that applies.

1. Aquafresh
2. Closeup
3. Colgate
4. Dabur
5. Oral-B
6. Sensodyne
7. Whitedent
8. Pepsodent
9. T-Guard
10. Paradontax

A4 Which of these brands of toothpaste have you bought in the past 3 months? (Select all that apply)

PROG: MA. RANDOMIZE BRANDS

PROG: SHOW BRANDS SELECTED IN A3

Please select the answer that applies.

1. Aquafresh
2. Closeup
3. Colgate
4. Dabur
5. Oral-B
6. Sensodyne
7. Whitedent
8. Pepsodent
9. T-Guard
10. Parodontax

A5. Which one brand of toothpaste do you buy most often? (Please select only one brand)

PROG: SA. RANDOMIZE BRANDS

PROG: SHOW BRANDS SELECTED IN A4

Please select the answer that applies.

1. Aquafresh
2. Closeup
3. Colgate
4. Dabur
5. Oral-B
6. Sensodyne
7. Whitedent
8. Pepsodent
9. T-Guard
10. Parodontax

A6 Which one brand of toothpaste did you purchase most recently? (Please select only one brand)

PROG: SA. RANDOMIZE BRANDS

PROG: SHOW BRANDS SELECTED IN A2

Please select the answer that applies.

1. Aquafresh
2. Closeup
3. Colgate
4. Dabur
5. Oral-B
6. Sensodyne
7. Whitedent
8. Pepsodent
9. T-Guard
10. Parodontax

A7 Please select the variant/flavour of <INSERT BRAND SELECTED AT A6> toothpaste you purchased most recently from the below images.

PROG: SA PER PACKSHOT SHOWN

PROG: SHOW IMAGES AND RANDOMISE

PROG: PULL IN PACKSHOTS SPECIFIC TO BRAND LOGO SELECTED IN A6 (REFER TO EXCEL)

Please select answer that applies.

1: Packshot 1

2: Packshot 2

3: Packshot 3

4: …

5: …

6: …

BRANDS CONSIDERED

A8 Suppose the brand(s) you regularly purchase are not available. Which other brands of toothpaste would you seriously consider buying instead? (Select all that apply)

[PROG: SHOW BRAND LIST IN ALPHABETICAL ORDER]

98: Other brand (specify) [PROG: SPECIFY; GRID OE (Unbound list); AUTOMATICALLY CREATE OE BOX IF FILLED]

[PROG: SHOW AWARE (A2) BRAND LIST EXCLUDING THOSE BRANDS SELECTED AT A4.

KEEP SAME BRAND ORDER AS IN A2 FOR REMAINING BRANDS

IF NO BRANDS QUALIFY SKIP TO A8]

99: Would not buy any of these brands (would wait until my regular brand is available again) [PROG: EXCLUSIVE]

[PROG: MULTIPLE RESPONSE]

99.1 Would not buy any of these brands – would wait for brand and variant to be available

99.2 Would not buy any of these brands – but would purchase a different variant within my normal brand.

[PROG: IF 99.2 IS SELECTED ASK 99.2.1

99.2.1 Can you please indicate which brand you would consider in place of your most often used brand and variant?

SHOW VARIANTS LINKED TO BRAND SELECTED IN A7.

Hide variant already selected in A7

A9 Why do you purchase <INSERT BRAND SELECTED IN A5> most often?

PROG: MA. RANDOMISE LIST (MULTIPLE SELECTION)

|  |  |
| --- | --- |
| It is a brand I trust | 1 |
| It is suitable for children | 2 |
| It is always available where I shop | 3 |
| Affordable | 4 |
| Premium brand | 5 |
| Only brand that cleans my teeth effectively | 6 |
| Quality brand | 7 |
| Has a good taste | 8 |
| It is a brand for the entire family | 9 |
| Reputable brand | 10 |
| Meets my oral care needs | 11 |
| Family needs | 12 |
| Other (SPECIFY) | 98 |

SECTION B: LAST PURCHASE (SETTING THE STAGE)

REASON FOR RETAILER CHOICE

B1. When people decide where to shop, some things are relevant to them and some things are irrelevant.

You mentioned earlier that you bought toothpaste most recently from <INSERT FROM S4D>, if you think about this purchase, how relevant are the below statements to you? Select all that are relevant only

PRODUCT OFFER/ASSORTMENT

They have a wide assortment

Because of the brands they offer

It has newly advertised products

Because it has the products I prefer

I can buy everything I need (1-stop)

PRICES/PROMOTIONS

They have good value for money

They are known for competitive prices

Because of the offered promotions

I had a coupon/voucher/store loyalty card there – PROG: ONLY ASK FOR MODERN TRADE S4d CODE 3

I earn loyalty points at this store – PROG: ONLY ASK FOR MODERN TRADE S4d CODE 3

AFTER-SALES SERVICE

It rarely runs out of stock

IMAGE, REPUTATION

They have good reputation

HABIT

I usually buy there

It is easy to find what I want

I can easily compare products

It makes me aware of new trends

It inspires me

The fast, convenient check-out

STORE ENVIRONMENT

It is a nice shopping environment

It is clean and inviting

‘Safe & Secure Neighborhood’

Convenient opening & Closing hours

STAFF

The helpfulness of the staff

There is sufficient staff available

CONVENIENCE

The location is convenient for me

Good parking facilities

Convenient opening hours

I don’t have to queue at this store

98: Other reason

[PROG:

* MA. RANDOMISE
* CODE 98 IS OTHER, ALWAYS IN THE END

PLANNED/UNPLANNED CATEGORY PURCHASE

B2. Did you know before going to <PROG: INSERT STORE FROM S4d>you were going to buy toothpaste?

* + - 1. Yes, I knew already before I was going to buy toothpaste and knew the brand I wanted
      2. No, I had not planned to buy toothpaste, I only decided at the shop
      3. I planned on buying toothpaste, but had not planned the brand, this was decided when I got to the store.

[PROG: SINGLE RESPONSE]

purchase influences – way to purchase

B2\_2. Thinking about your most recent toothpaste purchase, which describes the way you purchased <INSERT BRAND FROM A4>?

PROG: SA. RANDOMISE LIST

PROG: ONLY ASK IF CODE 2 SELECTED AT B2

PROG: CODE 11 – ADD TEXT BOX FOR VERBATIM

In-store purchasing

1: I’ve purchased this brand before, I’m convinced it’s the best brand [CONVICTED LOYALTY]

2: I just grabbed it quickly I didn’t really think about it [AUTO PILOT]

3: I decided based on the products that were displayed in-store [DECIDED AT POS]

4: I decided based on packaging information/design [DECIDED AT POS]

5: I decided based on price [PRICE]

6: I decided based on promotion [PROMOTION]

7: I asked the storekeeper for a recommendation [GUIDED AT POS]

8: I remembered a brand I’d seen advertised/on SM/a friend had recommended [ASP INFL]

9: I just wanted to try something new [EXPLORATION]

10: My usual brand/variant was out of stock [OUT OF STOCK]

98: Other (specify)

CATEGORY SHOPPING TRIGGER

B3. Which one of the following was the biggest trigger for you to buy toothpaste on that shopping occasion?

All out: I ran out of toothpaste and needed more

Running low: I still had toothpaste but wanted to avoid running out of it

I just saw something in the store that prompted me to purchase it (PROG: Only ask if answered CODE 2 in B2)

I saw there was a new variant/flavor and wanted to try it (PROG: Only ask if answered CODE 2 in B2)

It had a promotion or offer

Wanted to try something new

Needed a specialized toothpaste to treat an issue (e.g. stained teeth, bad breath, sensitivity)

I had a special occasion or event coming up (e.g. wedding, interview etc.)

Someone else asked me to buy

Other (specify) [PROG: SPECIFY]

[PROG:

* RANDOMIZE
* SINGLE RESPONSE
* CODE 98 IS OTHER SPECIFY, ALWAYS IN THE END]

SECTION C: PRE- AND IN-STORE TOUCHPOINTS

FLAG “TOUCHPOINT BRAND LIST”

* IF PORTFOLIO BRAND LIST: COMPOSE A BRAND LIST OF MAXIMUM 8 BRANDS:
  + Brands purchased in the past 3 months (A4)
  + then add brands from consideration set (A6+A8)
  + then add brands from aware list (A2) but not considered (did not select in A6/A8

IF MORE THAN 8 BRANDS QUALIFY FOR FLAG TOUCHPOINT BRAND LIST: INCLUDE ALL BRANDS FROM POINT 1. IF LESS THAN 8 BRANDS FOR POINT 1 THEN RANDOMLY SELECT BRANDS FROM POINTS 1, 2 AND 3.

SELF-INITIATED (PULL) TOUCHPOINTS

C1\_1 Before going to <INSERT CODE FROM S4d>, did you do any research to understand what is the best brand to buy?

PROG: SA

1: Yes

2: No

C1\_2. Please indicate all the things you have done related to toothpaste, before your most recent purchase.

I have done the following related to toothpaste

ONLINE

1: visited a brand website

2: read product reviews online

3: watched a video (e.g. on YouTube)

4: visited a blog/forum/online community

5: asked for recommendations on social media

6: visited the social media site of a brand

7: visited a retailer website to find out more about toothpaste, but without buying

8.Searched for oral care solution to help with a specific issue or symptom

9. Searched for information about the benefits of a toothpaste

10. Searched for a specific toothpaste brand

OFFLINE

11: visited a store to find out more about toothpaste, but without buying

12: went through store ads, flyers, leaflets or circulars

13: asked advice from friends/family

14: asked advice from someone who worked at the store/pharmacist

15: Did a dental screening

16: Asked advice from a dental professional

17: received a free product sample and education from clinic/school

98: other (specify) [PROG: OTHER SPECIFY]

99: didn’t do any of these

[PROG:

* ONLY ASK IF CODE 1 SELECTED AT C1\_2
* RANDOMISE BUT KEEP OFFLINE AND ONLINE TOGETHER
* MULTI RESPONSE
* CODE 98 IS OTHER SPECIFY, ALWAYS AT THE END
* CODE 99 IS NONE OF THESE, EXCLUSIVE, ALWAYS AT THE END]

[PROG: GO TO PART SECTION D:

* IF CODE 99 IN C1
* IF ONLY CODE 98 IN C1]

[PROG: ASK QUESTION C2 FOR EACH ANSWER INDICATED IN C1 (except code 98 USE LAYOUT WHERE EACH TP IS AN EXPANDABLE HEADER WITH ALL BRANDS UNDERNEATH <https://media.ipsosinteractive.com/sandbox/stefan.dragomir/Q22B.htm>]

C2. Which brands do you remember having seen or heard of when you [PROG: INSERT ANSWER FROM C1]?

[PROG: INSERT FLAG “TOUCHPOINT BRAND LIST”

96: Other brand (specify) [PROG: INSERT OPEN END AND ANCHOR]

99: None [PROG: EXCLUSIVE]

[PROG:

* MULTIPLE RESPONSES
* CODE 98 IS OTHER SPECIFY
* CODE 99 IS NONE OF THESE, EXCLUSIVE AND ANCHOR]

IMPOSED (PUSH) TOUCHPOINTS

Besides the things you did related to toothpaste, before your most recent purchased toothpaste, you may have seen, heard or experienced something about specific brands of toothpaste.

Q2\_2. Please select all the things you remember having seen, heard or experienced about toothpastes in the month before your last purchase.

OFFLINE

1: saw an ad when watching tv/video/movie

2: heard a radio ad

3: saw outdoor advertising (on a billboard etc.)

4: saw print advertising in a magazine or newspaper

5: read a story about the brand in magazines, newspapers, tv or radio

6: received a brochure, folder, mail order catalogue, … at home

7: received a free product sample and education from clinic/school

8: received a product coupon

9: heard others talk about it

10: received an offer via retailer membership

11. Engaged in a marketing activation or dental screening

ONLINE

11: saw advertising on the internet (banner/ pop-up)

12: received an e-mail from the brand or a store

13: got a text message or phone call from a store or brand

14: saw a message/picture/group on social media (Facebook / Instagram / Twitter / …)

15: received a message in a digital app

16: read a story about the brand online

17: saw ratings / reviews

98: other (specify) [PROG: OTHER SPECIFY]

99: didn’t see, hear or experience any of these

[PROG:

* RANDOMISE BUT KEEP ONLINE AND OFFLINE TOUCHPOINTS TOGETHER
* MULTI RESPONSE
* CODE 98 IS OTHER SPECIFY, ALWAYS IN THE END
* CODE 99 IS NONE OF THESE, EXCLUSIVE, ALWAYS IN THE END]

[PROG: GO TO PART 2\_3:

* IF CODE 99 IN Q2\_2
* IF ONLY CODE 98 IN Q2\_2]

[PROG: ASK QUESTION Q2.2b FOR EACH ANSWER INDICATED IN Q2\_2 (except code 98) – USE LAYOUT WHERE EACH TP IS AN EXPANDABLE HEADER WITH ALL BRANDS UNDERNEATH <https://media.ipsosinteractive.com/sandbox/stefan.dragomir/Q22B.htm>]

Q2\_2b. Which brands do you remember having seen or heard of when you [PROG: INSERT ANSWER FROM Q2.2]?

[PROG: INSERT FLAG “TOUCHPOINT BRAND LIST”

96: Other brand (specify) [PROG: INSERT OPEN END AND ANCHOR]

99: None [PROG: EXCLUSIVE]

[PROG:

* MULTIPLE RESPONSES
* CODE 98 IS OTHER SPECIFY
* CODE 99 IS NONE OF THESE, EXCLUSIVE AND ANCHOR]

SECTION D: IN-STORE (OFFLINE)

TOUCHPOINTS AT FINAL POS

D1\_1 Think back to your visit to <PROG: INSERT STORE FROM S4d > when you bought toothpaste. Did you see or experience anything about toothpaste during that specific visit?

PROG: SA

1: Yes

2: No

D1\_2. Think back to your visit to <PROG: INSERT STORE FROM S4d > when you bought toothpaste.

What have you seen or experienced about toothpaste during that specific visit?

Displays/in-store advertising [PROG: ONLY ASK FOR MODERN TRADE CODE 3 S4d]

18.       saw a special display

19.       saw shelf advertising (e.g. headers, tags, wobblers, …) [PROG: ONLY ASK FOR MODERN TRADE CODE 3 S4d]

20.       saw window/wall posters

21.       saw floor decals/signs [PROG: ONLY ASK FOR MODERN TRADE CODE 3 S4d]

22.       saw advertising on the shopping cart [ONLY ASK FOR MODERN TRADE CODE 3 S4d]

23.       saw leaflets/brochures/ catalogues [ONLY ASK FOR MODERN TRADE CODE 3 S4d]

24.       saw in-store digital or TV-advertising [ONLY ASK FOR MODERN TRADE CODE 3 S4d]

25.       asked/received help from a store employee

26.       received recommendation from a store employee

27.       tried or used products in store

28.       Promotions [PROG: COLLAPSIBLE HEADERS] [PROG: ONLY ASK FOR MODERN TRADE CODE 3 S4d]

29.       saw/received a free volume/multi-pack deal

30.       saw/received a price reduction/instant rebate/coupon

31.       saw/received free samples

32.       received a free gift with purchase

33.       saw/received extra loyalty card points or advantages

34.       saw/received other type of discount

98: other (specify) [PROG: OTHER SPECIFY]

99: none of these [PROG: EXCLUSIVE]

[PROG:

* ONLY ASK IF CODE 1 SELECTED AT D1\_1
* EXPANDABLE HEADERS
* RANDOMISE HEADERS AND RANDOMIZE WITHIN HEADERS
* MULTI RESPONSE
* CODE 98 IS OTHER SPECIFY, ALWAYS IN THE END
* CODE 99 IS NONE OF THESE AND EXCLUSIVE, ALWAYS IN THE END]

[PROG: GO TO PART DECISION TREE:

* IF CODE 99 IN D1
* IF ONLY CODE 98 IN D1]

[PROG: ASK QUESTION D2 FOR EACH ANSWER INDICATED IN D1 (except code 98) – ; QUESTION STUCK ON TOP OF SCREEN]

D2. Which brands do you remember having seen or heard when you saw [PROG: INSERT ANSWER FROM D1]?

[PROG: INSERT FLAG “TOUCHPOINT BRAND LIST”

96: other brand (specify) [PROG: SPECIFY]

99: none [PROG: EXCLUSIVE]

[PROG:

* MULTIPLE RESPONSES
* CODE 98 IS OTHER SPECIFY
* CODE 99 IS NONE OF THESE, EXCLUSIVE]

D3. Which of these factors were most influential in your choice of purchase?

PROG: SA

PROG: SHOW ALL CODES SELECTED IN C1\_2 AND D1\_2

SECTION E: ROLE OF TOUCHPOINTS

[PROG: FOR A RANDOM SELECTION OF TOUCHPOINT SELECTED IN C1, D1 (MAXIMUM 4) – IF NONE OR OTHER IN ALL QUESTIONS, SKIP TO F1\_2 – ASK 1 TOUCHPOINT AT A TIME]

E1. You said you [PROG: INSERT ANSWER FROM C1/ D1 (excluding codes 98 and 99)]. How did it help you in making the choice for the brand you ended up buying?

Please select all statements which apply, if any.

[PROG:

* MULTI RESPONSE
* RANDOMIZE ITEMS]

INSPIRATION/ASPIRATION

1. It inspired me
2. It indicated that this brand/product is liked by other people
3. It convinced me to try this brand for the first time

ALERT

1. It made me aware of the existence of certain brands/products
2. It made me aware of a promotion/reward

GUIDANCE

1. It helped me compare brands and products
2. It informed me about experiences of other people with brands/products
3. It informed me on expert opinions about the products in the category

DEEPENING

1. It informed me about specific product features or benefits
2. It informed me how the product is used or when to use it
3. It informed me about exact price, delivery terms …
4. Other Specify

SECTION F: THE IN-STORE DECISION MAKING FOR THE BRAND

[PROG: ASK F1\_1 TO F1\_3 IN LOOP FOR EVERY BRAND BOUGHT IN A4]

FINDERS VS. DECIDERS

F1\_1. Thinking back to when you made your purchase which one of these applies?

PROG: SA

PROG: ONLY ASK IF CODE 1 OR CODE 3 SELECTED AT B2

1: I knew the brand I wanted

2: I had 2-3 brands in mind, and I only made the decision in store

3 I had no specific brand in-mind

purchase influences – mind still not made up

F1\_2. Which of the following statements best describes how you ended up buying [ASK FOR EACH BRAND BOUGHT IN A4]?

PROG: SA. RANDOMISE LIST

PROG: ONLY ASK IF CODE 2 OR 3 SELECTED AT F1\_1

STANDARD LAYOUT, RANDOMISE

In-store purchasing

* 1. I decided based on the products that were displayed in-store [DECIDED AT POS]
* 2. I decided based on packaging information/design [DECIDED AT POS]
* 3. I decided based on packaging design [DECIDED AT POS]
* 4. I decided based on price [PRICE]
* 5. I decided based on promotion [PROMOTION]
* 6. I asked the storekeeper for a recommendation [GUIDED AT POS]
* 7. I remembered a brand I’d seen advertised/on Social Media/a friend had recommended [ASP INFL]
* 8. I just wanted to try something new [EXPLORATION]
* 9. I just grabbed it quickly I didn’t really think about it [AUTOPILOT]

REASON FOR FINAL BRAND CHOICE

F1\_3. When you decided to buy PROG: INSERT BRAND FROM A4, IF CODE 98 INSERT TEXT ENTERED] how relevant was each of the following reasons for this specific purchase? Select all that are relevant

* + - 1. There was a promotion
      2. It was affordable
      3. Available in the pack sizes I want
      4. Easy to find among other products
      5. Recommendation of friends / family
      6. Many of my friends have this brand
      7. Recommendation of store employee/pharmacist
      8. Recommendation by Dentist or other professional
      9. Broad range of benefits
      10. A brand I already used in the past
      11. Is a brand I trust
      12. I trust the quality of this brand
      13. It was attractively displayed
      14. It is an innovative brand
      15. it receives good product reviews
      16. Offers me the specific benefit I or my family needs
      17. Is suitable for my whole family to use
      18. It is always available where I shop
      19. Has attractive packaging
      20. Has ingredients I like
      21. Other reason

[PROG:

* MA. RANDOMIZE ITEMS
* CODE 98 IS OTHER, ALWAYS IN THE END

in

SECTION G: OVERALL EVALUATION OF THE PAST TO (LAST) PURCHASE

PURCHASE INFLUENCES – MADE UP MIND

G1\_1. Which of the following statements best describes how you ended up buying toothpaste?

PROG: SA. RANDOMISE LIST

PROG: ONLY ASK OF CODE 1 SELECTED AT F1\_1

1: I bought the brand I wanted [CONVICTED LOYALTY]

2: I just grabbed it without really thinking about it [AUTOPLIOT]

3: I changed my mind in-store and bought a different brand

purchase influences – mind change

G1\_2. What made you change your mind?

PROG: SA. RANDOMISE LIST

PROG: ONLY ASK OF CODE 3 SELECTED AT G1\_1

In-store purchasing

* 1. My usual brand/flavour/pack was out of stock [OUT OF STOCK]
* 2. I decided based on the products that were displayed in-store [DECIDED AT POS]
* 3. I decided based on packaging information/design [DECIDED AT POS]
* 4. I decided based on price [PRICE]
* 5. I decided based on promotion [PROMOTION]
* 6. I asked the storekeeper for a recommendation [GUIDED AT POS]
* 7. I remembered a brand that I saw advertised/on SM/a friend had recommended [ASP INFL]
* 8. I just wanted to try something new [EXPLORATION]

SECTION H: THE BROADER CONTEXT OF THE SHOPPING TRIP

SHOPPING MISSION

H1\_1. Irrespective of your purchase of toothpaste, what was the general purpose of your visit to <INSERT STORE FROM S4d]>?

1: A main shopping trip, where you are buying a large number of items.

2: A fill-in shopping trip, where you are buying a few items in between major shopping trips

3: A special purpose shopping trip, where the main purpose of the trip was to purchase toothpaste

4: A sale/coupon shopping trip, where you came mainly because the toothpaste you wanted were on sale or you had a coupon

5: A random or spontaneous shopping trip

98: Other (specify) [PROG: SPECIFY]

[PROG:

* RANDOMISE
* SINGLE RESPONSE
* CODE 98 IS OTHER SPECIFY, ALWAYS IN THE END]

PAIN POINTS

H1\_2. Do you have any suggestions for <INSERT STORE FROM S4d> where you last purchased toothpaste to improve the experience of buying toothpaste?

[PROG: OPEN END]

I1. Since your purchase of toothpaste, which, if any, of the following activities have you done?

SECTION I: POST-PURCHASE TOUCHPOINTS

Written review(s) about the …

1. product on brand website
2. product on store website
3. product on compare/review website
4. product on my blog, vlog, YouTube, …
5. store where you purchased

Posted something on a social networking site:

1. posted/written a comment
2. uploaded photo(s) or video(s)

Mentioned it to family/friends/colleagues/classmates/ …

1. Showed the product in-person
2. Told about it without showing it

Started following …

1. the brand on social media
2. the store on social networking media
3. an online community of brand/product users

98: Other (specify) [PROG: OTHER SPECIFY]

99: None of the above

[PROG:

* EXPANDABLE HEADERS
* MULTI RESPONSE
* CODE 98 IS OTHER SPECIFY, ALWAYS IN THE END
* CODE 99 IS NONE OF THESE, EXCLUSIVE, ALWAYS IN THE END]

SECTION J: GENERAL ORAL CARE USAGE

I’m now going to ask you about general oral care usage.

J1. You mentioned that you use toothpaste; how long have you been using toothpaste for?

PROG: SA. ASK ALL

|  |  |
| --- | --- |
| Frequency |  |
| For 1-3 months | 1 | |
| For 3-6 months | 2 | |
| For 6 – 12 months | 3 | |
| For 1-2 years | 4 | |
| For 2-5 years | 5 | |
| For 5 – 10 years | 6 | |
| For more than 10 years | 7 | |

J2. Can you please tell me, how often do you use toothpaste?

PROG: SA

|  |  |
| --- | --- |
| More often than three times a day | 1 |
| Three times a day | 2 |
| Twice a day | 3 |
| Once a day | 4 |
| 3-6 times a week | 5 |
| 1-2 times a week | 6 |
| Once in 2 weeks | 7 |
| Once a month | 8 |
| Once in 3 months | 9 |
| Once in 6 months | 10 |
| Once a year and less often | 11 |

J3. What part of the day do you usually use toothpaste?

PROG: SA

|  |  |
| --- | --- |
| Throughout the day | 1 |
| In the morning and in the evening | 2 |
| In the morning only | 3 |
| In the afternoon only | 4 |
| In the evening only | 5 |

J5. On a scale of 1 to 5, where 1 is Strongly Disagree and 5 is Strongly Agree, please indicate which statement applies to you.

PROG: SA PER STATEMENT. RANDOMISE LIST

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Strongly disagree | Disagree | Neutral | Agree | Strongly agree |
| I buy toothpaste mainly based in its functionality (e.g., whitening, tartar control,cavity protection etc.) | 1 | 2 | 3 | 4 | 5 |
| My goal is to have a healthy mouth | 1 | 2 | 3 | 4 | 5 |
| Oral care issues are largely preventable | 1 | 2 | 3 | 4 | 5 |
| I am diligent in taking care of my teeth every day | 1 | 2 | 3 | 4 | 5 |
| I prefer a general use toothpaste that protects against multiple things | 1 | 2 | 3 | 4 | 5 |
| My gums/teeth only require normal maintenance | 1 | 2 | 3 | 4 | 5 |
| My gums/teeth require a lot of specialized treatment | 1 | 2 | 3 | 4 | 5 |

J6. Which of the following teeth, gum and mouth conditions do you currently have, if at all?

PROG: SA PER ORAL CONDITION

PROG: RANDOMISE LIST

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Oral conditions | No problems | Slight problems | Moderate problem | Severe problems |
| 1: Toothache | 1 | 2 | 3 | 4 |
| 2: Cavities or holes in teeth | 1 | 2 | 3 | 4 |
| 3: Plaque | 1 | 2 | 3 | 4 |
| 4: Tartar | 1 | 2 | 3 | 4 |
| 5: Gum inflammation | 1 | 2 | 3 | 4 |
| 6: Bleeding gums | 1 | 2 | 3 | 4 |
| 7: Bad breath | 1 | 2 | 3 | 4 |
| 8: Sensitive teeth | 1 | 2 | 3 | 4 |
| 9: Yellow/stained teeth | 1 | 2 | 3 | 4 |

J7. Please confirm your monthly household income? This would be the combined salaries/earnings of everyone in the household.

PROG: SA

PROG: RANDOMISE LIST

|  |  |
| --- | --- |
| 1 | Up to KSH 20,000 |
| 2 | KSH20,001 Up to KSH 60,000 |
| 3 | KSH60,001 – KSH 120,000 |
| 4 | KSH120,001 – KSH300,000 |
| 5 | KSH 300,001 – KSH 600, 000 |
| 6 | KSH 600,001 – KSH1,200,000 |
| 7 | KSH 1,200,001 – KSH 2,400,000 |
| 8 | KSH 2,400,001 – KSH 4,200,000 |
| 9 | KSH 4,200,001 – KSH 6,000,000 |
| 10 | More than KSH 6,000,000 |

*Interviewer note: Please ensure a good range of monthly household income.*

J8. What could you say to describe your household’s financial situation?

PROG: SA

PROG: RANDOMISE LIST

|  |  |
| --- | --- |
| 1 | We do not have enough money even for food |
| 2 | We have enough money for food, but buying clothes is a problem for us |
| 3 | We have enough money for food, clothes and small appliances, but it would be a problem for us to buy a TV, fridge or washing machine now |
| 4 | We have enough money for major household appliances, but we could not afford to buy a new car |
| 5 | We have enough money for everything, except expensive purchases, such as a cottage or an apartment |
| 6 | We do not have any financial problems. If necessary, we could buy a cottage or an apartment |
| 7 | Refused  HIDDEN VARIABLE  P2P Segmentation Classification Variable   |  |  | | --- | --- | | **CONVICTED LOYALTY** | CODE 1 AT B2 AND CODE 1 AT F1\_1 AND CODE 1 AT G1\_1  CODE 2 OR 3 AT B2 AND CODE 1 AT B2\_2 | | **AUTOPILOT** | CODE 1 AT B2 AND CODE 1 AT F1\_1 AND CODE 2 AT G1\_1  CODE 1 AT B2 AND CODES 2 OR 3 AT F1\_1 AND CODE 8 AT F1\_2  CODE 2 AT B2 AND CODE 2 AT B2\_2 | | **PRICE** | CODE 1 AT B2 AND CODE 1 AT F1\_1 AND CODE 3 AT G1\_1 AND CODE 4 AT G1\_2  CODE 1 AT B2 AND CODES 2 OR 3 AT F1\_1 AND CODE 3 AT F1\_2  CODE 2 AT B2 AND CODE 5 AT B2\_2 | | **PROMOTION** | CODE 1 AT B2 AND CODE 1 AT F1\_1 AND CODE 3 AT G1\_1 AND CODE 5 AT G1\_2  CODE 1 AT B2 AND CODES 2 OR 3 AT F1\_1 AND CODE 4 OR AT F1\_2  CODE 2 AT B2 AND CODE 6 AT B2\_2 | | **DECIDED AT POS (DISPLAY)** | CODE 1 AT B2 AND CODE 1 AT F1\_1 AND CODE 3 AT G1\_1 AND CODE 2 AT G1\_2  CODE 1 AT B2 AND CODES 2 OR 3 AT F1\_1 AND CODE 9 AT F1\_2  CODE 2 AT B2 AND CODE 3 AT B2\_2 | | **DECIDED AT POS (PACK)** | CODE 1 AT B2 AND CODE 1 AT F1\_1 AND CODE 3 AT G1\_1 AND CODE 3 AT G1\_2  CODE 1 AT B2 AND CODES 2 OR 3 AT F1\_1 AND CODE 2 AT F1\_2  CODE 2 AT B2 AND CODE 4 AT B2\_2 | | **GUIDED AT POS** | CODE 1 AT B2 AND CODE 1 AT F1\_1 AND CODE 3 AT G1\_1 AND CODE 6 AT G1\_2  CODE 1 AT B2 AND CODES 2 OR 3 AT F1\_1 AND CODE 5 AT F1\_2  CODE 2 AT B2 AND CODE 7 AT B2\_2 | | **AD/SOCIAL/PEER INFLUENCE** | CODE 1 AT B2 AND CODE 1 AT F1\_1 AND CODE 3 AT G1\_1 AND CODE 7 AT G1\_2  CODE 1 AT B2 AND CODES 2 OR 3 AT F1\_1 AND CODE 6 AT F1\_2  CODE 2 AT B2 AND CODE 8 OR 18 AT B2\_2 | | **EXPLORATION** | CODE 1 AT B2 AND CODE 1 AT F1\_1 AND CODE 3 AT G1\_1 AND CODE 8 AT G1\_2  CODE 1 AT B2 AND CODES 2 OR 3 AT F1\_1 AND CODE 7 AT F1\_2  CODE 2 AT B2 AND CODE 9 AT B2\_2 | | **OUT OF STOCK** | CODE 1 AT B2 AND CODE 1 AT F1\_1 AND CODE 3 AT G1\_1 AND CODE 1 AT G1\_2  CODE 2 AT B2 AND CODE 10 AT B2\_2 | |