

Who Should You Survey?

A Planning Worksheet for Defining Your Research Audience

Before designing questions or choosing a methodology, spend time to define exactly who you need to hear from. Use this worksheet to clarify your audience before briefing a research agency.

1. What decision will this research support?

What are you trying to understand, validate, or decide?

Customers

- ☐ Why customers are leaving
- ☐ What customers value most
- ☐ How customer needs are changing
- ☐ Which parts of the customer experience need improving

Products & Services

- ☐ Whether a new proposition has market demand
- ☐ Whether a new product or feature should be launched
- ☐ What barriers exist to adoption
- ☐ Which improvements customers would prioritise

Brand & Marketing

- ☐ How your brand is perceived
- ☐ Which messages resonate most
- ☐ How you compare to competitors
- ☐ Why a campaign performed as it did

Market & Thought Leadership

- ☐ Which market opportunities to prioritise
- ☐ What challenges your audience is facing
- ☐ How attitudes are changing over time
- ☐ Which themes will be most relevant for thought leadership

Something else?

What decisions, actions or investments could be influenced by the findings?

2. Who do you need to hear from?

Describe the ideal participant in one sentence. Don't worry about being too specific. The clearer you are, the easier it becomes to recruit the right participants.

Example: *UK-based CFOs and Finance Directors working in manufacturing businesses with 250+ employees who are involved in software purchasing decisions.*

Audience description

3. B2B Audience Criteria

Complete if researching business audiences.

Job Role / Function

- ☐ CEO
 - ☐ CFO
 - ☐ COO
 - ☐ CIO / IT
 - ☐ HR
 - ☐ Marketing
 - ☐ Procurement
 - ☐ Operations
 - ☐ Other:
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Seniority

- ☐ C-Suite
 - ☐ Director
 - ☐ Head of Department
 - ☐ Manager
 - ☐ Other:
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Decision-Making Responsibility

- ☐ Final decision-maker
- ☐ Budget holder
- ☐ Influencer
- ☐ User
- ☐ Recommender

Company Size

- ☐ 1–49 employees
 - ☐ 50–249 employees
 - ☐ 250–999 employees
 - ☐ 1,000+ employees
 - ☐ Other:
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Company Revenue (if relevant)

- ☐ Under £10m
 - ☐ £10m–£50m
 - ☐ £50m–£250m
 - ☐ £250m+
 - ☐ Other:
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Industry / Sector

4. Consumer Audience Criteria

Complete if researching consumers.

Age

Gender (if relevant)

Household Characteristics

Income / Affluence Criteria

Location

Product or Service Usage

- ☐ Current user
- ☐ Former user
- ☐ Prospective user
- ☐ Non-user
- ☐ Competitor customer

Purchase Behaviour

5. Geography

Which markets matter?

- ☐ UK
- ☐ Europe
- ☐ North America
- ☐ APAC
- ☐ Global
- ☐ Other:

Further detail:

- ☐ National
- ☐ Regional
- ☐ Urban
- ☐ Rural
- ☐ specific locations:

6. Customers, Prospects, or Both?

Who should be included?

- ☐ Existing customers
- ☐ Lapsed customers
- ☐ Prospects
- ☐ Competitor customers
- ☐ Wider market

What perspective does each group bring?

7. Any Essential Screening Criteria?

Participants must:

- ☐ Have purchased recently
- ☐ Use a specific product/service
- ☐ Hold a specific role
- ☐ Work in a specific sector
- ☐ Meet company size criteria
- ☐ Meet revenue criteria

☐ Other:

Who should NOT be included?

Are there any groups whose views might distort the findings or aren't relevant to the objective?

Examples: *Existing customers only; Very small businesses; Junior employees; Certain geographic markets*

8. Reality Check

Before finalising your target audience, ask:

- Can this audience realistically be reached?
- Is the audience large enough to support robust research?
- Are we describing the people who can answer our business question?
- Have we prioritised relevance over convenience?
- Would two different people interpret this audience description in the same way?