

Sample Screener

Name _____

Phone (H) _____

(W) _____

(C) _____

Email _____

Address _____

City _____ State _____ Zip _____

Recruiter _____ Date _____

Screener Guidelines

Thank you very much for assisting us with this important project. Please read the following notes before beginning your recruiting.

Overall Study Objectives

Portigal Consulting has designed a study to help our client better understand the experience of... We will be looking at people's online DETAILS activities, and how CLIENT can OBJECTIVE.

The Research

We will be asking participants to complete four weekly logging assignments using an online survey tool. Each assignment will cover one week of activities, and should take around 15 minutes to complete.

On completion of the logging activity, we will be scheduling selected participants for a two-hour follow up interview. This interview will take place in the participant's home. The interview will be videotaped, and participants will be asked to sign a consent form.

AT NO TIME DURING THE SCREENING OR DURING THE STUDY ITSELF WILL WE ASK QUESTIONS ABOUT [DETAILS.]

Throughout screening, this should be made clear to participants.

Recruiting Guidelines

Please follow strict adherence to the following prior to recruiting for this study:

The sponsor of this research study is *CLIENT*

Strictly adhere to the past participation guidelines. We are very sensitive to avoid “professional respondents.”

Please do not push. If you sense the respondent isn’t interested in participating, don’t allow them to. We want only people who are excited and motivated to contribute.

Do not recruit anyone with a heavy accent or who seems to have difficulty with speaking or understanding English. Video and audio recording will be used in the field work and the audio recording will be used for transcription, so only fluent English speakers are needed.

Please be sure that the potential participant is articulate and comfortable expressing themselves.

Recruit number and location

We are seeking 4 recruits who live within the Austin, TX area.

[OVERVIEW OF SAMPLE BREAKDOWN]

Timing

There will be a four-week logging period from the week of August 23 to the week of September 13, with one assignment per week which should take about 15 minutes to complete.

In-home follow up interviews will take place during the week of October 4th.

IMPORTANT: To qualify for the research, respondents must be willing and available to complete both the four weeks of logging and the in-home interview.

Recruiter: Introduce yourself, the company you represent, and that the study is for research purposes (not sales purposes).

1. How often do you listen to music?

Daily

Weekly

Every other week

DISMISS

Monthly

DISMISS

Less than once per month

DISMISS

2. Do you own a mobile device that you use regularly to listen to music?

Yes
No

DISMISS

2a.. If yes, how long have you owned a that mobile device?

Less than 3 months
Between 3 months and 1 year
More than 1 year

DISMISS

2b. If yes, how many hours per week do you estimate you listen to music on your mobile device?

IF < 5 THEN DISMISS

3. Do you listen to music on a computer or a TV?

Yes
No

DISMISS

3a. If yes, how often?

Daily
Weekly
Every other week
Monthly
Less than once per month

DISMISS
DISMISS
DISMISS

4. Do you regularly listen to music on any other devices?

Yes (describe _____)
No

5. How many music platforms to you have paid subscriptions to? Do not count platforms where you have a free subscription or that don't charge to listen?

IF < 4 THEN DISMISS

7. What online sites do you typically go to when learning about new music? Select all that apply.

RollingStone.com
Variety
Melody Maker.uk
Hot100
YouTube
USAToday
TikTok

Target
Barnes and Noble
None of the Above
Other, specify: _____

IDEAL RESPONDENT IS [SITE]

8. Which of the following best describes your living situation?

Live alone	DISMISS
Live with housemates	DISMISS
Live with parents	DISMISS
Live with spouse/partner	CONTINUE
Other	DISMISS

9. How many children under the age of 18 live in your household?

IF < 1 THEN DISMISS

10. Into which of the following age categories do you fall?

Younger than 16 years old	DISMISS
16 to 18 years old	DISMISS
18 to 24 years old	DISMISS
25 to 30 years old	CONTINUE
30 to 39 years old	CONTINUE
40 to 49 years old	CONTINUE
50 to 59 years old	DISMISS
60 years or older	DISMISS

11. Are you currently employed?

Yes
No
PARENT)

HOLD (FOLLOWUP FOR STAY-AT-HOME

12. Who is your employer?

13. What type of work do you do?

14. Do you or any member of your household or family currently work for or recently have worked for... **(IF YES TO ANY, DISMISS)**

- An advertising/public relations company
- A marketing research company
- A marketing company
- A marketing or research department of a company

15. Are you currently participating or scheduled to participate in any market research projects with any company?

- Yes **DISMISS**
- No **CONTINUE**

16. How long ago, if ever, was the last time you participated in a market research discussion group? _____ **(IF LESS THAN 6 MONTHS, DISMISS)**

17. How many times total have you, yourself participated in a market research discussion group? _____ **(IF MORE THAN 3, DISMISS)**

18. What was your total household income before taxes in YEAR?

- Less than \$25,000 **DISMISS**
- \$25,000 to \$34,999 **DISMISS**
- \$35,000 to \$49,999 **DISMISS**
- \$50,000 to \$74,999 **DISMISS**
- \$75,000 to \$99,999
- \$100,000 to \$149,999
- \$150,000 or more
- Don't know/Choose not to answer **DISMISS**

19. For this last question, can you tell me a story about a recent experience that you had while grocery shopping?

[RECORD RESPONSE BELOW, VERBATIM. SEE NOTE.]

RECRUITER: USE THIS QUESTION TO IDENTIFY ESPECIALLY ARTICULATE RESPONDENTS THAT ARE EASY TO UNDERSTAND. ANSWERS MUST BE INTERESTING, THOUGHTFUL AND WELL-EXPRESSED. IT IS EXTREMELY IMPORTANT THAT RESPONDENTS IN THIS STUDY ARE ARTICULATE. IF RESPONDENT DOES NOT GIVE A TWO OR THREE SENTENCE, UNPROMPTED ANSWER, YOU MUST TERMINATE. ALSO TERMINATE IF RESPONDENT HAS A HEAVY ACCENT OR IS DIFFICULT TO UNDERSTAND. A LOST RESPONDENT AT TIME OF SCREENING IS MUCH LESS COSTLY THAN A LOST INTERVIEW DUE TO INARTICULATENESS.

PLEASE BE CERTAIN THE RESPONDENT TALKS FOR 2-3 SENTENCES WITHOUT YOU ASKING ANY ADDITIONAL QUESTIONS.

INVITATION

We're interested in understanding OBJECTIVE.

We're interested in learning from you so that we can improve the customer experience for the future. By sharing your experiences with us, you will make a significant impact on our ability to serve the needs of our customers across the country

We have contracted a research firm, Portigal Consulting, to conduct this study on behalf of CLIENT and we are inviting a small number of people to participate.

This project is for research purposes *only*. Absolutely no attempt will be made to sell you any products or services. At no time will we ask questions about [DISCLAIMER]

To participate in this study, you must be willing and able to participate in two activities:

1. Logging activity: During a **four-week period** (from the week of August 23 to the week of September 13) you will be asked to complete a **weekly logging activity** using an online survey tool. Each week's log will cover one week of activities, and should take around 15 minutes to complete
2. In-home interview: On completion of the four-week logging activity, we will be scheduling selected participants to participate in a two-hour follow up interview. If you are selected, this interview will take place in your home. Interviews will be held the week of October 4th. We are also interested in including other household members, and may invite an additional household member to participate (with an additional honorarium granted).

Our interview team will be 2-3 people, and the interviews will be videotaped for research purposes only.

Incentive

In return for a good-faith effort to complete the log, you will receive an honorarium of \$100. If selected for the interview, you will receive an additional honorarium of \$150 upon completion of the interview. Since we are also interested in including household members we would like to invite another household member to participate in the interview (if available). In this case, we would pay a total of \$350 to the household.

Are you interested in participating in the study?

- Yes **CONTINUE**
 No

Are you able and willing to participate in both parts of the study? This would include the logging activity and the in-home interview.

- Yes **CONTINUE**
 No **THANK & DISMISS**

Are you able and willing to connect to the Internet and use a computer to complete the logging activity?

- Yes **CONTINUE**
 No **THANK & DISMISS**

Are you able and willing to be interviewed in your primary residence, where your computer and internet connection are located and used?

- Yes **CONTINUE**
 No **THANK & DISMISS**

Are you able and willing to be interviewed in your home during the week of October 4th?

- Yes **CONTINUE**
(NOTE ANY RESTRICTIONS _____)
 No **THANK & DISMISS**

We would also like to let you know in advance that in-home interviews will be videotaped for research purposes. Are you able and willing to fully participate in the research visit at your home?

- Yes **CONTINUE**
 No **THANK & DISMISS**

[PLEASE REINFORCE TO QUALIFYING RESPONDENTS THAT WE COUNT ON THEIR COOPERATION – ESPECIALLY AS WE DO OUR RESEARCH WITH COMPARATIVELY SMALL SAMPLES. IF THE RESPONDENT SEEMS HESITANT ABOUT COMMITTING TO THE STUDY, DO NOT RECRUIT.]

Respondent Name: _____

Mailing Address: _____

Daytime phone number of respondent: _____

Alternate phone number of respondent: _____

e-mail address of respondent: _____

CLOSING AND NEXT STEPS

Thank you for your time. We're looking forward to learning about your experiences

We will follow up soon with a confirmation email and instructions for completing the logging portion of the study.

We will be contacting selected participants after the logging activity is completed to schedule in-home interviews. Interviews will take place the week of October 4th.

Your participation in this study is very important. We are only able to select a few families for this research. At any time, if any problems come up that would prevent you from participating *fully* in this study, please contact **RECRUITER as soon as possible. Thank you for your time and responses. We look forward to your contribution.**