

[Enter Project Name]
Qualitative Focus Group Screening Questionnaire

Respondent Name:	_____		
Phone (Home):	_____	(Work):	_____
Address:	_____	City, State:	_____

Group Schedule					
Date	Group	Market Area	Time	Target Segment	Meal/Snack
Day, MM/DD	1	City			
	2				
	3				
	4				
Day, MM/DD	5	City			
	6				
	7				
	8				
Day, MM/DD	9	City			
	10				
	11				
	12				

Do not reveal reason for qualification or termination

Please ensure respondent is articulate, creative and has a good command of the English language.
 No heavy accents.

THE COMPANY does not pay for inarticulate or illiterate respondents.

Do not recruit any ethnic group heavily.
 Record incidence and tally all terminations



Screening Questionnaire

Hello, my name is _____ from _____, a marketing research firm. We are conducting a short survey today and we would very much like to include your views. Let me assure you that we are not involved in the sale of any products or services.

1. Interviewer record gender (**Interviewer: do not ask**)
 - Male → (Qualifies for groups x, x, x)
 - Female → (Qualifies for groups x, x, x)

2. Have you participated in a market research group discussion in the past six months?
 - Yes → **Terminate**
 - No

3. Have you **ever** taken part in a focus group or one-on-one discussion related to **[Insert project descriptor]**
 - Yes → **Terminate**
 - No

4. We are interested in talking to people with a variety of backgrounds. Are ***you or any member of your immediate family*** currently employed in any of the following occupations or areas? **[Read list; if yes to any, thank and terminate]**
 - Advertising or public relations
 - Strategy or management consulting
 - Marketing, market research, or direct marketing
 - Radio or TV broadcasting, or newspaper or magazine publisher
 - A company that manufactures, sells, or distributes **[Insert project related product here]**

Terminate if yes to any

5. What company do you work for? _____
 - Insert list of clients' competitors
 -



6. What is your occupation or job title?

Occupation: _____

Job Title: _____

If respondent works in marketing, sales, or advertising, thank and terminate.

Terminate if any of the following companies. If unsure, place interviewee on hold and ask the qualitative manager.

- Insert list of clients' competitors
-

7. Which of the following best describes your employment status?

- Employed full time
- Employed part time → no more than 2 if student not checked
- Full time student → terminate unless employed as well
- Part time student → terminate unless employed as well
- Homemaker → continue – watch quotas
- Retired → continue – watch quotas
- Not employed/seeking work

Quota: Minimum xx% of respondents in each group must be working full time.

8. Which of the following age categories do you fall in?

- Under 21 → Terminate
- 22 – 35 → Continue – strive for mix of ages
- 36 – 50
- 50 – 65
- Over 65

9. When purchasing **[Insert category]** products for your home, would you describe your role in the buying decision as: **(Read list)**

- Sole decision maker **Continue**
- Significantly involved in the decision process, but not the sole decision maker **Continue (check quota, only allow 3-4 per group)**
- Somewhat involved the decision **Thank and terminate**
- Not involved in the decision **Thank and terminate**



10. With regards to the use of **[Insert category]** products you have purchased, how would you describe your role in the **usage** of these products? Would you say you are: **(Read list)**

- | | |
|--|----------------------------|
| <input type="checkbox"/> Sole user | Continue |
| <input type="checkbox"/> Significant user, but not the sole product user | Continue |
| <input type="checkbox"/> Somewhat involved in the usage of product | Thank and terminate |
| <input type="checkbox"/> Do not use at all | Thank and terminate |

11. Now I'm going to read you a list of various **[Insert category]** products you may or may not currently own. For each of the products/categories, please tell me if you have purchased such an item **within the past 12 months** and what item(s) you have purchased **(Read list and record answers below)**

Products	Items Purchased in the Past 12 Months
Category 1 (e.g., product 1, product 2, etc.)	
Category 2 (e.g., product 1, product 2, etc.)	
Category 3 (e.g., product 1, product 2, etc.)	
Respondent must have purchased from at least 2 categories to qualify.	

12. Have you visited any of the following stores in the past 12 months? [If have not visited [insert client] in the past 12 months, thank and terminate]

- A. Have you purchased **[Insert category]** products from this particular retail store within the past 12 months? **[If no purchases from [insert client] in the past 12 months, thank and terminate]**
- B. Approximately what is the total value of your **[insert category]** purchases at **[read from stores purchased at]** in the past 12 months?
- C. On a scale of one to five where "1" is not at all likely and "5" is extremely likely, how likely are you to shop at this particular retail store in the future **[IF not 4 or 5 at [insert client] in the future, thank and terminate]**

	Visited in past 12 months	Purchased in past 12 months	Amount spent in past 12 months	Likelihood to shop in future
Competitor 1	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	1 2 3 4 5
Client	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	1 2 3 4 5
Competitor 2	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	1 2 3 4 5
Competitor 3	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	1 2 3 4 5
Total			\$ _____	



13. Now I have a few final questions which will be used simply for classification purposes. First, which of the following categories best describes your annual household income?

	Check One	
Less than \$25,000	<input type="checkbox"/>	Terminate
\$25,000 to under \$35,000	<input type="checkbox"/>	Hold
\$35,000 to under \$75,000	<input type="checkbox"/>	Recruit at least 2 per category
\$75,000 to under \$100,000	<input type="checkbox"/>	
\$100,000 to under \$200,000	<input type="checkbox"/>	
More than \$200,000	<input type="checkbox"/>	

14. Which of the following best describes your marital status? [read list]

- Single, never married
- Married
- Divorced/Separated
- Widowed
- Unmarried, living together

15. Finally, I have a different kind of question just for fun ... if you could create the perfect [insert category] store or retail store department, what would it be like?

The purpose of this question is to make sure that the respondent is **articulate**, that is, that the respondent can express his or her thoughts and feelings without excessive probing. If the respondent gives a very brief answer or says "I don't know," or seems uncomfortable talking to the interviewer, then terminate. The respondent must be able to be heard clearly, that is, their voice should not be "quiet", their answer should not "trail off" and their accent should not be so thick that they cannot easily be understood. **The supervisor should review all these answers and they should be sent to THE COMPANY with the profiles on a daily basis as recruiting is completed.**

THE COMPANY does not pay for inarticulate or illiterate respondents.



Invitation

Thank you for your responses!!

I would like to invite you to participate in our upcoming consumer research study scheduled to take place **(date)** at **(location)**. You will participate in a small group discussion that will last approximately two and a half hours and you will be paid **(amount)** in appreciation for your participation. I think you will find it to be an interesting discussion, and at no point will we try to sell you anything. This study is strictly for marketing research purposes. Can we count on your participation in this research?

- Yes → Continue to schedule
- No → Thank and terminate

Read to All

We will be sending you a confirmation letter and directions to our offices shortly. If for some reason you do not receive this information two days prior to your appointment time, please call us toll-free at 1-800 _____ and ask for _____.

[insert homework assignment if any. Example: *We'd also like you to take a few minutes and prepare a brief assignment for this group. We'd like you to make a collage of products your perfect technology and entertainment products store or store department would include – we'll choose the best one at your group and award that person an additional \$75. We'll send you instructions for this when we send you confirmation of this group.***]**

Please bring your valid driver's license with you to serve as identification since only you, the qualified participant, will be allowed to participate in the study.

Thank you for your time and we look forward to seeing you on _____ at _____.
(Repeat appointment day and time that is 15 minutes prior to group – see cover page.)

RECRUITING NOTE: When this respondent shows up at your facility, if he or she is obviously there just for the cash, THE COMPANY will not authorize paying the respondent. Respondent must be ready to be an active participant in the group – e.g. listening, giving opinions, etc – in order to receive payment.

- Group Specifications
- Recruit 12 to seat 8
- May not work in a sensitive industry (Qx)
- May not work in a competing company (Qx)
- Must be sole decision maker or significantly involved (3-4) (Qx)
- Must be sole user or significantly involved category (Qx)
- Must have purchased products from at least 2 categories in the past 12 months (Qx)
- Must have visited (Qx) and purchased (Qx) from client in the past 12 months
- Must be likely to shop at client in the future (Qx = 4 or 5)
- Recruit at least 2 allowable income ranges per group (Qx)
- Must be articulate. THE COMPANY does not pay for inarticulate respondents (Qx)

