**INTRODUCTION TO SCREENING GUIDELINES FOR CPG PRODUCT TESTING**

Effective participant screening is one of the most critical steps in conducting successful market research. The goal of a well-crafted screener is to ensure that the individuals participating in your study are representative of your target audience, providing valuable and relevant insights.

This document will guide you through the essentials of creating a screening process that will:

- **Identify the right participants** for your focus groups, surveys, or product tests.
- **Exclude individuals** whose backgrounds or experiences might skew the results.
- **Improve the overall quality of your data** by ensuring that only qualified respondents take part.

**Why Screening Matters**

Choosing the right participants isn't just about demographics; it's about selecting individuals whose experiences and preferences align with the goals of your research. Proper screening helps you:

- **Filter out irrelevant or biased participants** (such as those with industry conflicts).
- **Confirm participant eligibility**, such as product usage frequency or location.
- **Ensure consistency** across responses, leading to more reliable insights.

This guide provides an easy-to-follow structure for screening participants, including key considerations like order bias and specific industry exclusions. Whether you're testing a new product or gathering consumer feedback, these screening guidelines will help you recruit the best participants for your research.

**Glossary of Market Research Terminology**

- **Brand Awareness**: A question used to assess how familiar a participant is with different brands in a product category. It can help determine whether the participant is a current customer, a competitor's customer, or unfamiliar with the brands being studied.

- **Form Factor**: Refers to the different types or categories of a product within a specific industry. For deodorants, that might be spray, roll on, solid stick. For snacks, it might be savory vs. sweet flavors, or for peanut butter, smooth vs. crunchy.

- **Industry Screen**: A screening question designed to exclude participants who work in specific industries that may introduce bias into the study, such as advertising, media, or market research. For example, someone working in cannabis might be excluded from a study on cannabis products to avoid conflicts of interest.

- **Non-Disclosure Agreement** (**NDA**): A legal contract participants sign to agree that they will not share any information about the product being tested or the research itself outside the focus group. This helps protect proprietary information.

- **Order Bias**: A bias that occurs when the order of answer choices influences participants' responses. To prevent order bias, it's important to randomize or rotate answer options so that participants do not always select the first or easiest option. However, do not randomize if the answer choices have inherent logic, like series of ascending number or a scale that needs to be consistent. If there is an "Other: specify" or "None of the above", those should always go last.

- **Palate Cleansing**: In product testing, participants may be asked to cleanse their palate (e.g., by drinking water) between samples to ensure they can fully evaluate each product without lingering effects from the previous one.

- **Purchase Activities**: A question type used to understand the participant's buying habits in relation to the product being tested. It ensures that the participants have purchased or used similar products recently, which makes them relevant to the study.

- **Quotas**: In market research, quotas are used to ensure that a specific number of participants with specific characteristics reflecting the desired target audience (e.g., age, gender, product usage) are included in the study. This helps to achieve a representative sample.

- **Randomization**: A technique used in surveys to present questions or answer choices in a different order for each participant. This helps to minimize order bias by ensuring no answer is consistently more likely to be chosen due to its position in the list.

- **Sub-Categories**: Specific product variations or types within a broader category. For example, under pre-rolls, sub-categories might include regular pre-rolls, THC-infused pre-rolls, or live resin-infused pre-rolls.

- **Term or Terminate**: This is used in market research to indicate that a participant is disqualified, excluded or should be removed from a study based on their responses. If a participant doesn't meet the screening criteria, they are "excluded" from the interview or survey. Within the market research industry, the jargon commonly used is "terminate" or "term" for short, but this can be confusing for non-industry folks.

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