Project: _____

CPG Screening Template (General, NOT CONTROLLED SUBSTANCES)

INTRODUCTION

[CLIENT NAME or MARKET RESEARCH TEAM] is currently recruiting participants for upcoming focus groups, product tests, surveys, and other consumer research studies.

To determine if you are a good match for this study, please answer a few brief questions. The questionnaire should take about 3-5 minutes to complete. **Since you will be testing a product, it is important that your answers are accurate to ensure your full and safe participation.**

Please note that all responses are entirely anonymous and will never be linked to you personally.

SCREENER QUESTION	NOTES
***GEOGRAPHY:** **In what metro area do you live?**	*The relevance will depend on the type of study.
INDUSTRY SCREEN: Are you or any member of your household involved in any of the following industries? 1. **Advertising or Publicity - EXCLUDE** 2. **WHATEVER YOUR CATEGORY IS – EXCLUDE (example: Food: a company that manufactures, sells, or distributes food products)** 3. **Entertainment, Media, or Journalism - EXCLUDE** 4. Healthcare 5. Hospitality and Tourism 6. **Marketing – EXCLUDE** 7. **Market Research - EXCLUDE**	This question is designed to exclude participants who may have biases due to their industry or profession. Certain industries (such as advertising or market research) may provide participants with insider knowledge that could influence their feedback. Be sure to include any additional industries specific to your study (e.g., if it's a snack food study, exclude participants who work in that industry). For studies focused on younger demographics or certain cities (e.g., Los Angeles), you may need to adjust these industries based on the common professions for the area or target audience.
PURCHASE ACTIVITIES: Which of the following have you personally purchased in the past month? • Unrelated category • **WHATEVER YOUR PRODUCT CATEGORY IS** – *MUST SELECT TO CONTINUE* • Unrelated category • None of the above	This question ensures that participants are active consumers within the product category relevant to your research. By including cannabis as a required selection, you screen for those who are engaged with the product type you are testing, without explicitly revealing the focus of the study. This helps prevent leading responses while still confirming relevant consumer behavior.
CONSUMPTION ACTIVITIES: Which of the following have you personally consumed in the past month? • Unrelated category	Especially for products purchased for other household members like children, the purchaser and consumer are not necessarily the same people, so determine if that is relevant for your purposes.

• **WHATEVER YOUR CATEGORY IS** – *MUST SELECT TO CONTINUE* • Unrelated category • None of the above	
What role do you play in household grocery purchasing of WHATEVER PRODUCT CATEGORY? • Primary shopper • Share shopping with another household member - EXCLUDE • Occasional shopper – EXCLUDE • Never or rarely shopper – EXCLUDE	
How many children under age 18 are living in your household? What are their ages? Child #1: age _____ Child #2: age _____ Child #3: age _____ Child #4: age _____ Child #5: age _____	
PURCHASE CHANNEL: From where do you typically get your **WHATEVER YOUR CATEGORY IS**? (CHOOSE ALL THAT APPLY) • Online shopping • Visit a grocery store • Visit a "big box" retailer [Such as Costco or Sam's Club] • Farmers markets • Other (specify) _____	This question ensures that participants are purchasing the product from the type of outlets where your product is sold. For example, if your product is only available at local grocery stores, it's essential that participants regularly purchase from these locations to ensure they have exposure to similar products. If you're testing packaging or the purchasing experience, you want to further specify whether they buy onsite in-store, pick up, or order delivery online.
CONSUMPTION FREQUENCY: On average, how frequently do you consume WHATEVER PRODUCT? (ALLOW ONE ANSWER.) • 3 or more times per day • 1 to 2 times per day	This question ensures that participants' consumption frequency aligns with your target market. By requiring participants to consume at the pace of the target consumers, you can focus on individuals who have sufficient experience and engagement with the product category. Participants who consume less frequently are excluded, as their limited usage may

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- 4 to 6 days a week
- 1 to 3 days a week
- Once every other week
- Once a month – *EXCLUDE*
- Less often than once per month – EXCLUDE

</td>
<td>not provide the depth of insight you're seeking for the study.</td>
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BRAND FAMILIARITY:

How familiar are you with WHATEVER PRODUCT from the following brands? CHECK ONE ANSWER PER ROW. *[ROTATE TO REMOVE ORDER BIAS]*

<table>
<tr><th></th><th>One of my current brands</th><th>Have tried</th><th>Never tried</th></tr>
<tr><td>Your Brand</td><td></td><td></td><td></td></tr>
<tr><td>Competitor</td><td></td><td></td><td></td></tr>
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Optional Adjustment for More Granularity:
If more detailed brand awareness data is needed, you can adjust the response options to the following:

- My primary brand
- One of my brands
- Have tried in the past
- Heard of but not tried
- Never heard of

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<td>This question assesses participants' familiarity with both your brand and competing brands. It helps identify whether they are loyal customers, occasional users, or unfamiliar with your product and your competitors. By rotating the order of the brands, you reduce the potential for order bias, ensuring more accurate responses.

If you have quotas for current customers, competitive customers, or participants who have never tried the brand, this question helps you balance those segments.

This breakdown provides more nuanced insight into participants' familiarity with each brand, allowing you to understand where each brand stands in the participant's purchasing decisions or awareness.</td>
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SAFETY AND HEALTH CONSIDERATIONS:

Do you have any medical or other issues that prevent you from consuming WHATEVER PRODUCT that contain (peanuts, dairy, allergens)?

- YES - EXCLUDE
- NO
- I’m not sure - EXCLUDE

</td>
<td>This question ensures the safety of all participants by screening for any medical conditions or other issues that could pose a risk when consuming WHATEVER PRODUCT. It is essential to include this question to avoid situations where a participant's health might be compromised during the study. Participants who answer "YES" should be excluded from participation to prioritize their well-being.</td>
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GENDER IDENTIFICATION: With which gender do you most identify currently? • Female • Male • Non-binary/Third gender • Other (specify): _____	This question ensures inclusive representation in the study, allowing participants to self-identify based on their gender. The "Other/specify" option provides flexibility for those who do not identify with binary or predefined gender categories. Including this question helps you analyze any differences in product perception based on gender identity and ensures diversity within the participant pool.
EMPLOYMENT STATUS: *Question:* At this time, are you…? (SINGLE SELECT) • Employed full-time (more than 30 hours per week) • Employed part-time (30 hours or less per week) • Retired • Unemployed • Rather not answer – *EXCLUDE*	This question ensures that participants are actively employed or in a relevant life stage. Those who are retired or unemployed may not align with the target market, especially for product or consumer behavior studies focused on working adults. Additionally, participants who choose "Rather not answer" may not provide the necessary transparency for proper segmentation and should be excluded. Adjust this question as needed based on your target audience.
OCCUPATION: What do you consider your occupation? **Open-end** CLARIFY ROLE, IF NEEDED. **– *EXCLUDE*** IF ANYTHING TO SUGGEST MARKETING, ADVERTISING, ANALYSIS OR OTHER GROUNDS FOR EXCLUDING FROM PROJECT.	This open-ended question allows participants to specify their current job or profession, which can provide insights into their lifestyle and purchasing power. It also helps identify any potential conflicts of interest, as participants in certain professions (e.g., marketing or media) may need to be excluded due to potential bias. This information can be used to further refine your participant pool and ensure relevance to the study's goals.
AGE: What is your age? ___ (exact 2-digit number) **Or** What is your age? • Under 18 • 18–20 • 21–34 • 35–44 • 45–54	So how do you ask about age? There are several ways to do this. For precision, use an open-ended numeric input or year of birth dropdown. For simplicity, use pre-defined age ranges. If you client cares primarily about generation, ask it that way. If your survey can be set up to collect exactly birthday, that is ideal. Most online panel sources have that embedded into their sample. If not, you'll want to ask age, either the exact number or in buckets.

• 55–64 • 65+ **Or** **GENERATION:** To which generation do you belong? READ NAMES, NOT PARENTHETICAL YEARS* • Silent Generation (1928–1945) • Baby Boomers (Born 1946-1964) • Gen X (Born 1965-1980) • Millennials (Born 1981-1996) • Gen Z (Born 1997-2012) – PROBE EXACT AGE. *EXCLUDE ANYONE UNDER LEGAL AGE.* • Generation Alpha (2013-TBD) – *EXCLUDE*	You can include a "Prefer Not to Answer" option and then exclude that participant, to be on the safe side. Understanding participants' generational cohort can provide valuable context for analyzing preferences and behaviors. Different generations may have distinct attitudes towards products, technology, and consumption habits. This question allows you to ensure balanced representation across age groups or focus on specific generational targets for your study. Exclude anyone under age 21. *Generations definitions can skew by a few years, so I suggest people self-identify by generation and NOT mention the birth years unless necessary.
Contact Information Please provide your contact information. If selected to participate, you will receive a follow-up email from Fordis Consulting. **(All fields must be completed)** • **First Name:** • **Preferred or Nickname:** • **Last Name:** • **Email Address:** • **Mobile Phone Number (to text/call for confirmation):**	Collecting accurate contact information ensures that you can follow up with selected participants and verify their location. Be sure that participants provide a working mobile phone number and email address for confirmation purposes. This information also helps you cross-reference their eligibility and confirm they are local to the area for in-person focus groups.

FOR IN-PERSON STUDIES OR GEOGROPAHIC QUOTAS, ADD:

GEOGRAPHY: **In what metro area do you live?**	The relevance will depend on the type of study.
AREA, IF ONSITE TESTING: This project will be held in [INSERT ROUGH LOCATION OR NEIGHBORHOOD] in the evening/daytime. Do you live within a 30-minute drive distance of this area?	*Instead of asking for the distance in miles, ask about driving time, as traffic can vary significantly by location. In some cities, a 10-mile drive could take up to 45 minutes during rush hour. Ensure that participants can

• YES - EXCLUDE • NO	realistically reach the research site on time and without major inconvenience.