

Recruiting Screener for an Ethnographic Study

OVERVIEW

Study dates	October 13-15
Location	In participants' homes
Number of participants	8 participants and 8 alternates
Methodology	Two-hour, one-on-one, in-home ethnographic study
Participation compensation	<ul style="list-style-type: none"> • \$250 in compensation for participants • \$150 in compensation for alternates
Participant technology requirements	<ul style="list-style-type: none"> ● Participants must have an iPad or iPhone and be comfortable using it

RECRUITMENT CRITERIA

Recruit each participant to the following specifications:

Mix of ages: 25-59	Question 3
Shoot for a range that is similar to this: 25-29: 2 30-39: 3 40-49: 2 50-59: 1	
Education	Question 13
High school graduate or higher	
Household income	Question 14
\$55,000+	

Gender and Ethnicity	Questions 0, 12
Recruit a mix	
Online Proficiency	Questions 8, 10
Moderate mainstream users; goes online at least once a day to do more than just read email; comfortable online	
Brand Awareness	Question 11
Doesn't reject Liberty Mutual	
Decision Maker	Question 7
Is the insurance decision maker in the household	

Homeowners, Condo Owners, and Renters	QUESTIONS 4, 5
Recruit 8 participants (2-3 Liberty Mutual customers, 5-6 customers of other insurance companies) <ul style="list-style-type: none"> ● Recruit 4-6 home or condo owners ● Recruit 2-4 renters 	
Geographic Location	Question 15
Recruit all participants (8 total) who live in the greater Boston area	
Primary Target	Questions 9, 10
Recruit 5 iPad and 3 iPhone users who are experienced downloading and using productivity apps for the iPad and iPhone	
Primary Target	Question 6
Recruit 2-3 participants who have filed a property claim in the last 3 years, some who are Liberty Mutual customers, some who are not	
Primary Target	Question 5
Recruit 2-4 Liberty Mutual customers. Recruit 4-6 participants who are customers of other insurance companies, in particular GEICO and Progressive. <i>Ask who their policy is with and record it.</i>	

Usability Test Dates: October 13-15

Schedule
10:00 a.m.-7:00 p.m.; 2-3 sessions per day, with at least 90-minute breaks in between to allow for travel between sites
Number and Length
A total of 8, two-hour, in-home interviews (8 participants + 8 alternates to be recruited)
Incentives
\$250 gift cards for participants \$150 gift cards for alternates

Testing Schedule

Tuesday, October 13 Testing Schedule (2 slots, 2 participants & 2 alternates)

Date	Participant	Time	Alternates
Tuesday, October 13			
Recruit 2 participants and 2 alternates	1	10:00 a.m.- 12:00 p.m. \$250	Alternate 1 (10:00 a.m.-12:00 p.m.) \$150
	2	1:30 p.m.-3:30 p.m. \$250	Alternate 2 (1:30 p.m.-3:30 p.m.) \$150

Wednesday, October 14 Testing Schedule (3 slots, 3 participants & 3 alternates)

Date	Participant	Time	Alternates
Wednesday, October 14			
Recruit 3 participants and 3 alternates	3	10:00 a.m.- 12:00 p.m. \$250	Alternate 3 (10:00 a.m.-12:00 p.m.) \$150
	4	1:30 p.m.-3:30 p.m. \$250	Alternate 4 (1:30 p.m.-3:30 p.m.) \$150
	5	5:00 p.m.-7:00 p.m. \$250	Alternate 5 (5:00 p.m.-7:00 p.m.) \$150

Thursday, October 15 Testing Schedule (3 slots, 3 participants & 3 alternates)

Date	Participant	Time	Alternates
Thursday, October 15			
Recruit 3 participants and 3 alternates	6	10:00 a.m.- 12:00 p.m. \$250	Alternate 6 (10:00 a.m.-12:00 p.m.) \$150
	7	1:30 p.m.-3:30 p.m. \$250	Alternate 7 (1:30 p.m.-3:30 p.m.) \$150
	8	5:00 p.m.-7:00 p.m. \$250	Alternate 8 (5:00 p.m.-7:00 p.m.) \$150

Study Introduction

Participant Name	
Scheduled Date and Time	
Mobile Phone Number	
Second Phone Number	
Email	

We are recruiting for customer research study related to insurance. This study will take about 2 hours and will be conducted in one-on-one, in-home sessions, October 13-15.

Participants will receive \$250 as compensation in the form of a gift card.

Alternates will receive \$150 in gift cards. If a participant does not show, the alternate will take part in the customer research study.

Is this something you would be interested in?

If yes:

This will be an interview in your home, with a moderator and a note taker. You will be talking with a person from our staff who will lead you through the session.

We need to get some background information to see if your background is a good match for the study.

NOTES TO RECRUITER:

Please send us a summary table of who is coming, plus their demographics

0. Please note:	
	Female
	Male

1. In our discussion, we would like to include a mix of people – some who have been interviewed by a market research company or participated in a usability test in the past, and some who have not been interviewed by a market research company or participated in a usability test. Have you ever participated in a focus group, a panel discussion, or an individual interview conducted by a marketing research company, or have you ever participated in a usability test?	
Yes	ASK: How long ago was that?
No	IT MUST HAVE BEEN AT LEAST 6 MONTHS AGO. IF NOT, TERMINATE.
Do you recall the topic? _____ PLEASE CHECK. IF RELATED TO ANY INSURANCE PRODUCT, TERMINATE	

2. Do you or anyone in your household work: READ LIST	Yes	No	Refused
In market research or usability research			
For an insurance company			
Designing or developing websites			
IF "YES" OR "REFUSED" TO ANY – TERMINATE			

3. Please tell me which of the following categories includes your age. Shoot for a range that is similar to this. Are you... READ LIST	
TERMINATE	Under 25
Recruit 2 participants	25 to 29
Recruit 3 participants	30 to 39
Recruit 2 participants	40 to 49
Recruit 1 participant	50 to 59
TERMINATE	60 or older
TERMINATE	Refused

4a. How many total insurance policies do you have (auto, home, renters, umbrella – but NOT health)?	
TERMINATE	0
	1
	2
	3+
RECRUIT A MIX	

4b. What types of insurance policies do you currently have? Check all that apply?	
	Auto <i>Terminate if they did not select Homeowners, Condo Owner, or Renters</i>
Recruit 4-6	Homeowners or Condo Owner
Recruit 2-4	Renters
	Umbrella (personal injury protection) <i>Terminate if they did not select Homeowners, Condo Owner, or Renters</i>
	Other please specify _____ <i>Terminate if they did not select Homeowners, Condo Owner, or Renters</i>

5a. Who is your current property insurance provider?	
Recruit 2-4	Liberty Mutual
Recruit 4-6	Other Insurance Company
RECRUIT 8 PARTICIPANTS TOTAL	
<i>Would like to get some participants who are customers of GEICO and Progressive</i>	

5b. How long have you been with your property insurance company? NOTE TO RECRUITER: DON'T READ ANSWERS. LET PEOPLE TELL YOU THEIR ANSWERS	
	0-1 year
	1-2 years
	2-3 years
	3 or more years
	RECRUIT A MIX

6a. Have you ever had to file a property insurance claim? NOTE TO RECRUITER: DON'T READ ANSWERS. LET PEOPLE TELL YOU THEIR ANSWERS	
	Yes
	No
Recruit 2-3 participants who have filed a property claim in the last 3 years, some who are Liberty Mutual customers, some who are not	

6b. If answer to 6a was "Yes," how many property insurance claims have you filed? NOTE TO RECRUITER: DON'T READ ANSWERS. LET PEOPLE TELL YOU THEIR ANSWERS	
	1
	2
	3 or more
	RECRUIT A MIX

6c. If answer to 6a was "Yes," how long ago did you file your last property insurance claim? NOTE TO RECRUITER: DON'T READ ANSWERS. LET PEOPLE TELL YOU THEIR ANSWERS	
	0-3 months ago
	4-6 months ago
	7-12 months ago
	1-2 years ago
	2-3 years ago
	More than years ago
	RECRUIT A MIX

7. Who in your household is the primary decision maker regarding insurance policies?	
	Me
TERMINATE	Another household member That is, TERMINATE IF RESPONDENT IS NOT THE PRIMARY DECISION MAKER

8a. How comfortable are you using the internet and websites in particular?	
	Extremely comfortable
	Very comfortable
	Somewhat comfortable
TERMINATE	Not very comfortable
TERMINATE	Not at all comfortable

8b. How often do you access the Internet (excluding Email)? NOTE TO RECRUITER: PLEASE DON'T READ THE ANSWERS. LET THE PROSPECTIVE PARTICIPANT TELL YOU	
	Multiple times a day
	Once a day
	2-3 times a week
TERMINATE	Multiple times a month
TERMINATE	Once a month
TERMINATE	Less than once a month

8c. Which of the following do you do online? READ LIST	Yes	No
Browse the web		
Read and write email		
Shop		
Search for information/do research		
Read news/sports		
Listen to music		
Listen to podcasts		
Watch videos		

9a. Do you own a smartphone or tablet?	
	Yes
TERMINATE	No

9b. If answered Yes in 9a, what type of smartphone or tablet device(s) do you own? Please mention all of them.	
	iPhone
	iPad
TERMINATE	Other

9c. If answered iPhone or iPad in 9b, what version of the iPhone or iPad do you have? Please mention all of them.	
	iPhone (Recruit users of iPhone 8 or higher only)
	iPad (Recruit users of iPad Air 2 or higher only)

9d. Have you downloaded and installed any iPhone or iPad applications onto your device from the App Store?	
	Yes
TERMINATE	No

10a. I am going to read you a list of iPhone or iPad applications. For each one, please tell me if you ever use that type of application. Note to Recruiter: For each one they ever use, ask: How often do you use that type of application? Would you say you use it less than once a month or less, 2-3 times a month, about once a week or more than once a week?					
News applications, to get information about news, sports, politics or weather	Never use	1x /month	2-3x /month	1x /week	>1x /week
Games, like puzzles, sports or action games					
Entertaining applications other than games—just fun things to help pass the time					
Productivity applications that help you get things done or help make everyday tasks easier—such as banking or managing your personal finances, managing insurance matters, making travel arrangements, buying items or researching a potential purchase					
ALL MUST USE PRODUCTIVITY APPLICATIONS AT LEAST 2-3 TIMES A MONTH TO QUALIFY					

10b. What specific iPhone or iPad productivity applications do you use on a regular basis?
PLEASE PROBE UNTIL THE RESPONDENT MENTIONS AT LEAST 2 AND UP TO 5 PRODUCTIVITY APPLICATIONS – IF THE RESPONDENT CAN'T IMMEDIATELY LIST 2 THAT HE OR SHE USES REGULARLY, PLEASE TERMINATE

11. Which, if any, of the following insurance companies would you <i>never</i> consider doing business with in the future?	
	Allstate
	Esurance
	Farmers
	GEICO
TERMINATE	Liberty Mutual
	Nationwide
	Progressive
	State Farm
	USAA
	I would consider doing business with any of the above companies

12. Which of the following best describes your ethnicity? (Read List, please record; recruit a mix)	
	Caucasian
	African American
	Asian Pacific or Pacific Islander
	South Asian
	Native American
	Alaskan Native
	Hispanic or Latino
	Mixed Racial Background
	Other
	Refused to answer

13. Just so that we have a representative mix, would you please tell me the last level of education that you completed? READ LIST	
TERMINATE	Some high school or less
	High school graduate
	Some college, no degree
	College degree
	Post graduate degree
RECRUIT A MIX	

14. Which of the following best represents your annual household income before taxes? Is it ...?
READ LIST

TERMINATE	Less than \$55,000
	At least \$55,000, but less than \$75,000 per year
	At least \$75,000, but less than \$100,000 per year
	At least \$100,000, but less than \$125,000 per year
	At least \$125,000, but less than \$150,000 per year
	At least \$150,000, but less than \$175,000 per year
	Over \$175,000 per year
PLEASE RECRUIT A MIX OF INCOMES FROM \$35K ON UP	

15. What city do you live in?

	Recruit 8 participants in the greater Boston area
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16. Now, I would like you to ask you to use your imagination. If you could go to dinner with any famous person, alive or dead, who would that be and why?	
PLEASE BE VERY ATTENTIVE TO THE RESPONSE FOR THIS QUESTION – IT IS VERY IMPORTANT. This question is to determine how creative and articulate and outgoing the respondent is. If the respondent is not able to express themselves, is not articulate or accent is too heavy to be clearly understood when answering the question, TERMINATE and tally]	

17. I'd like to invite you to host a customer research session in your home. Sessions will involve a moderator and a note taker. Is that OK?	
	Yes
TERMINATE	No

18. This discussion will take approximately 2 hours of your time. To show our appreciation, we'll offer you a \$250 gift card if you are chosen as a participant.	
	Yes CONTINUE WITH DATE, TIME, LOCATION, ETC
TERMINATE	No

Note: If you are selected to participate, we will be recording the session to get an accurate record of your feedback. The recordings will only be used for this project. The data from this study will not be used for any other purpose. Your name will not be associated with the video recording or any other data collected during the session.