



Chapter 11

Fieldwork

Business Research Methods

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Marketing Research

“The knowledge of the world is only to be acquired in the world, and not in the closet”

LORD CHESTERFIELD

Philip D. Stanhope (1694 – 1773), British and Man of Letters.”

Statesman



CONTENTS

1. FIELDWORK:
2. Interviewers
2. Interviewers' selection and training
3. Interviewers' control

★ FIELDWORK:

Researchers have 2 main options for collecting the data:

- ✓ Their own organizations
- ✓ Contract with a field work agency

Either way, data collection involves some kind of **field force**, which can operate:

- In the field (personal in home, mall intercept, computer assisted personal interview, and observation)
- Office

Work/Data Collection Process



1. Selecting the Field Workers

- ✓ Job Specifications
- ✓ Develop the characteristics that fieldworkers should have
- ✓ Recruit appropriate individuals

2. Training the Field Workers

★ Making the initial contact

-Cooperation or loss of the potential respondents

“Hello, my name is _____. How long does it take you to go to work everyday? (Wait for the respondent’s answer). It does usually take 2-3 hours walking for a person in some parts of Africa to get to a doctor. We highly value your opinion and would like to ask you a few questions”.

✓ Notice that the interviewer **did not specifically ask the respondent’s permission**. Questions that directly ask permission, such as “May I have some of your valuable time?” or “Would you like to answer a few questions?” should be avoided.

✓ Interviewers should also be instructed **on handling objections and refusals**. For example, if the respondent says “This is not a convenient time for me”, the interviewer should respond “what would be a more convenient time for you? I will call back then”

2. Training the Field Workers

★ Asking the questions

- ✓ Careful not to bias the response.

Asking questions is an art. Training in asking questions can yield high dividends in eliminating potential sources of bias. Changing the phrasing or order of questions during the interview can make significant differences in the response obtained.

- ✓ Ask the questions in the order in which they appear in the questionnaire:

- Use the exact wording given in the questionnaire
- Read each question slowly
- Repeat questions that are not understood
- Follow instructions, skip patterns, probing carefully.

2. Training the Field Workers

★ Probing

- ✓ Probing should not induce any bias. Some commonly used probing techniques are:
 - Repeating the question. It can be effective in eliciting a response.
 - Repeating the respondent's reply.
 - Using a pause or silent probe. But the silence should not become embarrassing.
 - Boosting or reassuring the respondent. If the respondent hesitates, the interviewer should reassure the respondent with comments: *"There are no right or wrong answers. We are just trying to get your opinions"*. If the respondent needs an explanation of a word or phrase, the interviewer should not offer an interpretation, unless written instructions to do so have been provided. Rather, the responsibility for the interpretation should be returned to the respondent. This can be done with a comment such as: *"Just whatever it means to you"*.
 - Using objective or neutral questions or comments.

2. Training the Field Workers

★Recording the Answer

- ✓ **Several mistakes are common.** Although the recording rules vary with every questionnaire, the general rule is to check the box that reflects the respondent's answer. The general rule for recording answers to **unstructured questions** is to **record the responses verbatim**. Some guidelines include:
- Record responses during the interview
 - Use the respondent's own words
 - Do not summarize or paraphrase the respondent's answer
 - Include everything that pertains to the question objectives
 - Include all probes and comments
 - Repeat the response as it is written down

2. Training the Field Workers

★ Terminating the Interview

- ✓ The interview should not be closed until all the information is obtained.
- ✓ Any spontaneous comments the respondent offers after all the formal questions have been asked should be recorded.
- ✓ The interviewer should answer the respondent's questions about the project.
- ✓ The respondent should be left with a positive feeling about the interview.
- ✓ It is important to thank the respondent and express appreciation.

3. Supervising the Field Workers

★Quality Control and Editing

- ✓ It requires checking to see if the field procedures are being properly implemented.
 - ✓ If any problems are encountered, the supervisor should discuss them with the interviewers.
 - ✓ Supervisors should collect questionnaires and other forms and **edit them daily**. They should examine the questionnaires to make sure all appropriate questions have been completed, that unsatisfactory or incomplete answers have not been accepted, and that the writing is legible.
- Supervisors should also **keep a record of hours worked and expenses in order to allow a determination of the cost per completed questionnaire**, whether the job is moving on schedule, and if any interviewers are having problems (Malhotra, 2012).

3. Supervising the Field Workers

★ Sampling Control

- ✓ Attempts to ensure that the interviewers are strictly following the sampling plan rather than selecting sampling units based on convenience or accessibility.
- ✓ Interviewers tend to avoid dwellings or sampling units that they perceive as difficult or undesirable.
- ✓ If the sampling unit is not at home, interviewers may be tempted to substitute the next available unit rather than call back.
- ✓ Interviewers sometimes stretch the requirements of quota samples. For example, a 58 year old person may be placed in the 46-55 category and interviewed to fulfill quota requirements.

To control these problems, supervisors should keep daily records of the number of calls made, the number of not-at-homes, the number of refusals, the number of completed interviews for each interviewer, and the total for all interviewers under their control.

3. Supervising the Field Workers

★ Control of Cheating

- ✓ Cheating involves **falsifying part of a question or the entire questionnaire.**
- ✓ An interviewer may falsify part of an answer to make it acceptable or may **fake the answers.**
- ✓ The worst form of cheating is when the interviewer falsifies the entire questionnaire, merely filling in fake answers without contacting the respondents.
- ✓ Cheating can be **minimized** through **proper training, supervision, and validation of field work** (Malhotra, 2012).

3. Supervising the Field Workers

★ Central Office Control

- ✓ Supervisors provide quality and cost-control information to the central office so that a **total progress report can be maintained**.
- ✓ In addition to the controls initiated in the field, other controls may be added at the central office **to identify potential problems**.
- ✓ Central office control includes tabulation of quota variables, important demographic characteristics, and answers to key variables.

4. Validating the Fieldwork

- ✓ It means verifying that **the field workers are submitting authentic interviews.**
- ✓ To validate the study, **the supervisors call 10 to 25% of the respondents** to inquire whether the field workers actually conducted the interviews.
- ✓ The supervisor asks about the **length and quality of the interview, reaction to the interviewer,** and basic demographic data.
- ✓ The **demographic information** is cross-checked against the information reported by the interviewers on the questionnaires.

5. Evaluating Field Workers

★ Cost and Time

- ✓ The interviewers can be compared in terms of the **total cost** (salary and expenses) **per completed interview**.
- ✓ If the cost differ by city size, comparisons should be made only among field workers working in comparable cities.
- ✓ The field workers should also be evaluated on how they **spend their time**. Time should be broken down into categories such as actual interviewing, travel, and administration.

5. Evaluating Field Workers

★ Response Rates

- ✓ It is very important to **monitor response rates** on a timely basis so that **corrective actions can be taken if these rates are too low**.
- ✓ Supervisors can help interviewers with an inordinate **number of refusals** by listening to the introductions they use and providing immediate feedback.
- ✓ When all the interviews are over, different field workers' **percentage of refusals can be compared to identify the better workers** (Malhotra, 2012).

5. Evaluating Field Workers

★ Quality of Interviewing

The supervisor must directly observe the interviewing process.

- ✓ The supervisor can do this in person or the field worker can record the interview on tape. The quality of interviewing should be evaluated in terms of:
 - the appropriateness of the introduction
 - the precision with which the field worker asks questions
 - the ability to probe in an unbiased manner
 - the ability to ask sensitive questions
 - interpersonal skills displayed during the interview
 - the manner in which the interview is terminated

5. Evaluating Field Workers

★ Quality of Data

Some indicators of quality data are that:

- The recorded data are **legible**
- All **instructions**, including skip patterns, are **followed**
- The **answers to unstructured** questions are meaningful and complete enough to be coded
- Item **non response occurs infrequently**.

EXAMPLE



“Probing for Deeper Meaning at Olson Zaltman Associates ”

At Olson Zaltman Associates, highly trained interviewers probe for the deeper thinking that underlies attitudes toward brands of product categories. The research firm’s method, called **ZMET** (for Zaltman Metaphore Elicitation Technique), begins by asking each respondent to come to a **one-on-one interview, bringing along a set of eight to ten photographs related to their thoughts and feelings about the interview’s topic**. The interviewer uses the photos and nonverbal clues about the associations the person makes with the product or brand.

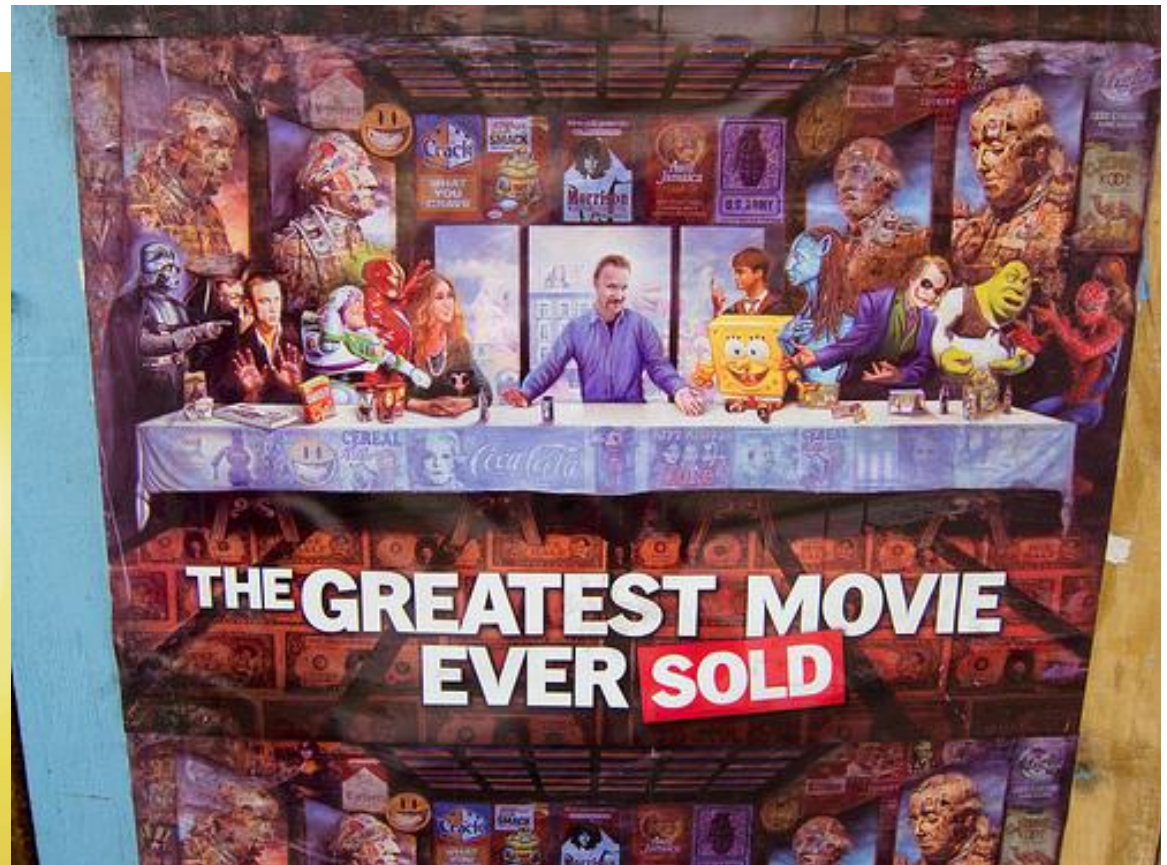
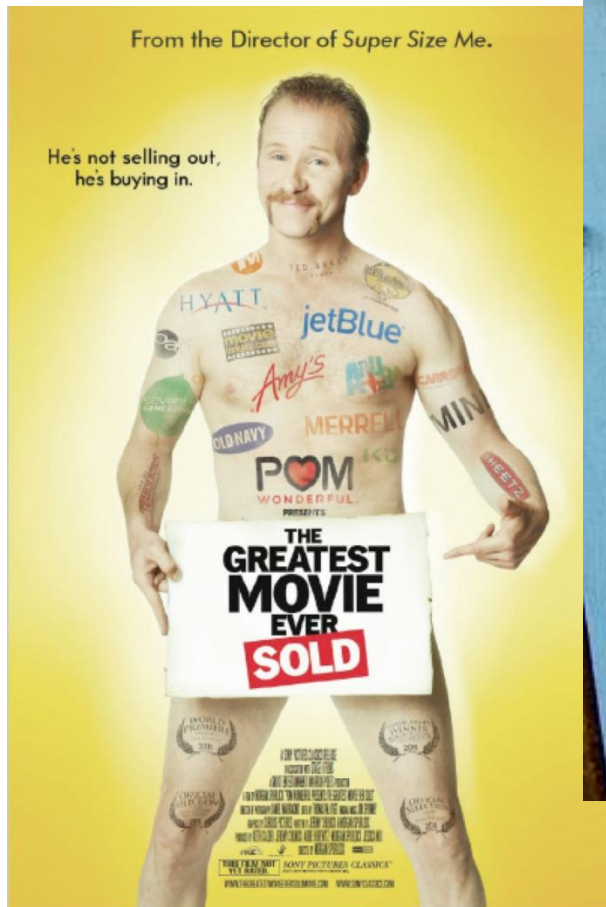
Researchers then use computer software to identify response patterns that suggest **“metaphors”** for the product –a general theme that describes respondent’s attitudes. In a study of air fresheners, people want to avoid having odours in their home alienate them from visitors (an underlying desire for connection with others); they also want an air freshener to seem natural, rather than masking something (an underlying desire to evoke nature). Based on these ideas, the client developed **Breeze Air freshener**. In another project, **Motorola** hired Olson Zaltman to help it market a high-tech security system. Many research participants brought in images of dogs, signifying the protection that dogs give the owners. As a result, Motorola avoided brand names emphasizing technology, instead calling the new system **Watchdog**.

The ZMET approach has shown to be useful across a wide variety of situations and cultures. In fact, Olson Zaltman Associates has conducted nearly 500 ZMET studies in 40 countries in “languages ranging from Arabic to Zulu”.

•Sources: Christensen, G.L. and Jerry C. Olson “Mapping Consumers’ Mental Models with ZMET”, *Psychology & Marketing* 19, n. 6 (June, 2002), 477-502; Olson Zaltman Associates, <http://www.olsonzaltman.com>.

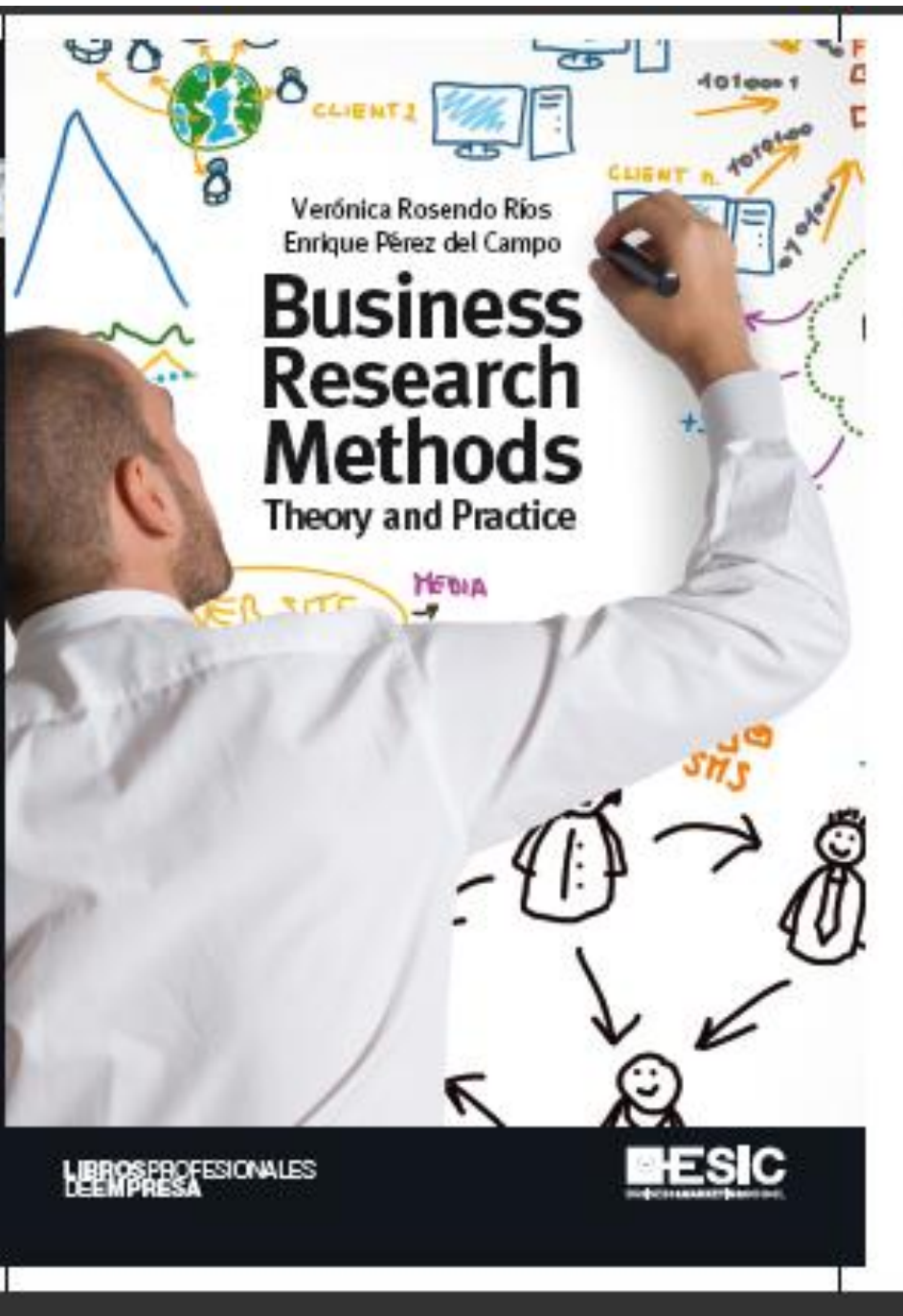
EXAMPLE

“Olson Zaltman Associates ”



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