Succeeding in the 21st Century
Qualitative Environment:
Top Tips for Fielding Today's Research

QRCA QCast
August 2, 2012
Presented by Judy Langer, Hosted by Pam Goldfarb Liss
On behalf of QRCA Field Committee
Today’s QCast

- The QRCA Field Committee

- Today’s Qualitative Environment

- Top Tips for Successful Fieldwork
THE QRCA FIELD COMMITTEE
Who We Are

- Mission: promote highest standards in recruiting, facility use, respondent treatment

- Constituencies: field, moderators, respondents, clients

- Members: mix of QRC-only and QRC/field service owners

- Approach: relationship-building, education, best practices
Recent FieldCom Initiatives

- Recent studies, whitepapers
  - Recruiters on Respondent Cooperation Study
  - Social Media Use in Recruiting Study
  - Sample Field Agreement Docs
  - Respondent Privacy Whitepaper
  - “Sweet 16” Dos/Don’ts of Field/QRC Relationships

- Coming up
  - Cost Estimate Whitepaper

Links will be sent to QCast participants
TODAY’S QUALITATIVE ENVIRONMENT
Qualitative Trends

- **More public awareness of focus groups/qual**
  - Good news: consumers more receptive to studies
  - Bad news: some more savvy about gaming the system

- **More diversity of qual methods**
  - Good news: more ways to understand people
  - Bad news: challenges in recruiting, non-facility set-ups

- **End of the “mass market” recruit**
  - Good news: more targeted
  - Bad news: difficult specs, picky quotas
Qualitative Trends

■ Social media use in recruiting
  – Good news: locating hard-to-find respondents
  – Bad news: some websites attract cheaters/repeaters, privacy issues, recruiter intrusiveness

■ E-mail blast recruiting
  – Good news: quick, inexpensive contacts with database
  – Bad news: some recruiters send full screener, easier for cheaters to lie
Qualitative Trends

- More variety in field service charges
  - Good news: ???
  - Bad news: debundling of items in base price = buyer beware
TOP TIPS FOR SUCCESSFUL FIELDWORK
Quality in Qual: Getting to WO(O)W!

- What We All Want
  - Wonderful recruiting
  - On time
  - On budget
  - Without pain
Ways of Getting to W(O)OW!

- Being PC: partnering and communicating
- Controlling costs
- Screening effectively
- Respecting respondent rights
Collaboration of client, QRC, field services

- Call on QRCs’ broad experiences with field services, respondent types, methodologies, etc.
- Consult with local supervisors about best schedules, market demos, incentives, etc.
Being PC: Communicating

- **Explain recruiting goals fully**
  - Give vivid picture of desired respondents

- **Specify social media/e-mail approaches wanted**
  - SM recruiting followed by telephone screening
  - Don’t e-mail whole screeners, study specs

- **Respond quickly to field questions/issues**
  - Confirm holds asap or risk losing them
Screening Effectively

Writing screeners

- Keep it short – 10 mins max, questions just for screening (qual recruiting isn’t a market survey)
- Make intros interesting, informative
- Reveal client list respondents sponsor if possible
- Put terminates early
- Write key questions open-ended/don’t read list
- Use articulation questions on study topic
- Ask for/listen to field service feedback
Screening Effectively

- **Reviewing screening**
  - Quotas – overall mix is what counts
  - If recruiting is harder than expected, question expectations
  - Changes in questions → changes in answers
  - Numerical scale answers easily subject to change

- **Recognize ethnography’s special issues**
  - Respondent concerns on home visits, strangers, tasks
  - Explain study purpose, reason for observers
Controlling Costs

- Clearer bid specs → more reliable cost estimates
  - Incidence, recruiting requirements, facility set-up, equipment needs, use of other venues, etc.
  - Confirm costs after study approval, screener draft

- Check on extra charges in bid, on requests
Controlling Costs

Avoid false savings

- Lowest-priced field service vs. best in the market
- A chain is only as good as the link – the facility matters
- No incentives
- No refreshments/meals at mealtimes
Controlling Costs: Study Set-Up

Consider higher cost choices carefully

- Random digit dialing recruiting
- Outside-facility venues
- Algorithms complicate recruiting, may not work
- Poor client lists – outdated, error-filled, unsorted
- Interview times bad for target group
- Changes in specs, homework, schedule, etc.
- Late requests for materials, equipment, room set-up
- Homework that’s complex, time-consuming, boring
- Product shopping by field service
Controlling Costs: Interview Day

- Consider higher cost choices carefully
  - Client refreshments for large number, fancy foods
  - Check charges – per beverage, minimum #, required meals
  - Check if facility charge for use over 1 hour before/after interviews
  - On-premise hard copies
Some options

- Recruit fewer respondents
- Minimum 2-week recruiting
- Keep homework to a minimum
- Client provides materials
- Bring your own copies
- Use video only if it will be watched
- Use stationary camera if you just need a record
- Carry materials back vs. overnight delivery
Respecting Respondent Privacy

- In codes of QRCA and all major research organizations
  - Respondent permission needed for client/QRC contact, even for client lists
  - Provide reasons for recontact, info use, hold field harmless
  - Spreadsheets should only show first name, last initial
  - Clients should not tweet info identifying respondents (!)
Getting to WO(O)W!

- Partnering of QRC, client and field service
- Communicating clearly desired goals, responding quickly
- Controlling costs without cutting corners
  - Consider options carefully, check charges, no false savings
- Screening effectively
  - Strong screeners, realism in recruiting
- Respecting respondent privacy
FieldCom Thanks You!

- Our members
  - Sybil Broh, Michelle Finzel, Pam Goldfarb Liss, Kathy Houk, Dave Kains, Helen Karchner, Judy Langer, Jan Lohs, Anndel Martin, Joel Reish, Andrea Schrager, Merrill Shugoll