



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

QRCA QCast

August 2, 2012

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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

- **W**onderful recruiting
- **O**n time
- **O**n budget
- **W**ithout pain



Ways of Getting to W(O)OW!

- **Being PC: partnering and communicating**
- **Controlling costs**
- **Screening effectively**
- **Respecting respondent rights**



Being PC: Partnering

■ 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



Cutting Costs, Not Cutting Corners

■ 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 Schragger, Merrill Shugoll