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Fieldwork:
The role of technology

Report by
Tim Macer, meaning ltd

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How has technology made fieldwork easier and more efficient?

For even the most capable fieldwork provider, the client from hell is the one that meddles and tinkers - and is still emailing over changes as the fieldwork goes live. For the buyer, the nightmare is not knowing that a hugely expensive survey is going badly wrong, until the results beg more questions than they answer and it is too late to repair the damage.

Today, technology can help everyone avoid these expensive mistakes by making what was historically a closed process into an open one, and allowing both parties to anticipate and correct errors. In the worst case, they now make it possible to take decisive corrective action, perhaps only sacrificing an hour of online or telephone interviewing, or a day of CAPI interviewing, not the whole job.

Most of today's software used to support fieldwork done on the Internet, can permit client access to monitor work before and during fieldwork. Mistakes or problems undetected by one pair of eyes can often be picked up by another, especially those with more subject-specific expertise, as the client will often have.

Increasingly, these features are now spreading to CATI and CAPI systems too, allowing remote monitoring from anywhere you can open a Web browser. The older technologies, notably Quancept or Surveycraft, or the old Bellview CATI did not offer such a way in, but their modern equivalents like mr Interview, Bellview Fusion, Nebu, Voxco and others too, provide web access to their back office functions. This means the fieldwork company can set up a specific login which lets each client see their own work in progress.

Usually, the level of access can be tailored to fit in with your comfort zone, or that of your supplier. For example, a the client may be able to view reports but not adjust quotas, whereas fieldwork managers, even when out of the office, will have the ability to modify quotas or make other changes.

Having early sight of preliminary results is one of the major benefits of web-enabled interviewing software. Yet the fear of the meddlesome client is, more often than not, causing fieldwork providers to close off these options, or at least, not to advertise them to their clients. Some fear that the client may spot an error before they do - something I consider to be an advantage, rather than a disadvantage. Others express the fear that giving clients access to partial results can result in false conclusions being drawn too early. But are these good enough reasons to keep the client in the dark?

In a complex business such as information gathering, not everything will always go to plan. As anyone involved in customer satisfaction research will testify, problems, even outright errors, are unlikely to damage relationships in the long term provided that the recovery is swift and effective. Client access to fieldwork systems not only means that there is more than one interested party watching what is going on: it can mean better early detection and a more fully informed decision about how best to react.

In the past, reacting quickly has been particularly difficult to achieve with face-to-face fieldwork, due to the inertia imposed by printing and distributing questionnaires and quota rosters to a distributed fieldwork force. The first generation of CAPI often conspired to increase this inertia, making it hard to recall or correct interviews once fieldwork had started, and impossible for interviewers to get round the problem. Now, companies are starting to experiment with wireless communications, so that quotas can be checked in real time, and completed results beamed back to the central database as soon as each interview is completed. These can also speed up the distribution process and allow for some controlled changes to be made to interview scripts even after the survey has gone into the field. For example, codeframes can be extended on the fly, in the way they can in CATI, to save interviewer and respondent time in handling semi-open questions such as product lists.

There is hope that online CAPI should eventually reduce fieldwork cost, by eliminating wasted interviews and reducing physical distribution costs. Data communication costs, at less than the price of a second class postage stamp per interview, now make this extremely viable. In urban areas, network coverage tends to be good enough now to be workable. But the cost of the hardware today, even though it has come down dramatically, means there is usually a mountain of capital investment that the fieldwork company has to climb before any savings can be realised. For the foreseeable future, speed and improved quality rather than cost are likely to be the greatest benefit.

Others are looking to using mixed-mode interviewing to achieve cost reduction. Leaving on one side the arguments about whether mixed mode results are to be trusted, apart from observing that some of the most effective mixed-mode research is currently being done by national statistics offices and by social researchers, where response rates below 85% are likely to result in the fieldwork being abandoned!

The trick is to shift as many interviews online as is possible and only use the more expensive methods where respondents are unable or unwilling self-complete on the web. But to actually save any money, your fieldwork agency must be using one of the new generation web-enabled systems, such as those we mentioned earlier. If not, any potential savings will be consumed in extra programming time, as a different script is written for different unconnected interviewing systems for CATI, CAPI and web.

The modern tools also make it easy for interviews to switch from mode to mode. For example, after an initial contact on the phone, the respondent is offered the option to complete online. A very truthful inducement can be offered that it will be quicker and more convenient if they have access to the internet. If the respondent agrees, then their email address is captured, and the system instantly generates an email containing the link to the survey.

In reverse, several of the new systems also provide a “call me” button, from the web survey, which results in an interviewer placing an outbound call to the respondent, and transfers the web interview to CATI mode.

There are plenty of other areas where an enlightened use of technology can result in huge administrative time savings. A lot of time is often wasted on either side of the fieldwork, getting data and definitions into the right shape.

It is generally true that the fancier the draft questionnaire, and the more Microsoft Word formatting that has been applied to it - especially if Word tables are involved - the longer it will take the technicians to program the script. It is worth speaking to them to see if, by dumbing down your document, you can dampen down the set-

up costs too. The same is true of the format in which you provide any sample: the less manipulation your supplier has to do, the better.

At the back end, check to see if you can steal some time and cost by getting the data out in a mutually compatible format. You may be insisting on data being squeezed into a format which requires a lot of skilled technician's time to achieve. See if you can use the triple-s standard to move data and all of the definitions and labels between their data collection system and your reporting systems. SPSS format is often a breeze too, but among the worst are Quantum and Quanvert, unless that is what your provider is using. And increasingly, that will not be the case.

Today's new crop of more open survey tools are creating opportunities for more transparent relationships between fieldwork suppliers and their clients. All it needs to make it work is a few open minds on both sides of the relationship.

Some questions for your fieldwork supplier

- Can I approve questionnaires or submit corrections electronically?
- Can I test your CATI/CAPI/CAWI survey online from my own PC?
- Can you provide Web-browser access to view real-time reports to monitor sample, quotas, completion rates and so on?
- Can I see any preliminary results online?
- With CATI, can I dial in and listen to some of the calls in progress, to monitor quality and get a feel for how the survey is working?
- Can you provide any interactive tools to allow me to analyse the data?
- Is there an online interface to let me construct my own codeframes for verbatim questions or quality-check a sample of your openended coding?
- Can you provide data to me in an industry standard format such as triple-s, so I don't have to re-enter any labels or definitions to analyse it in my own analysis package?
- If you provide data in a portal or client extranet, can I download data as well as reports?