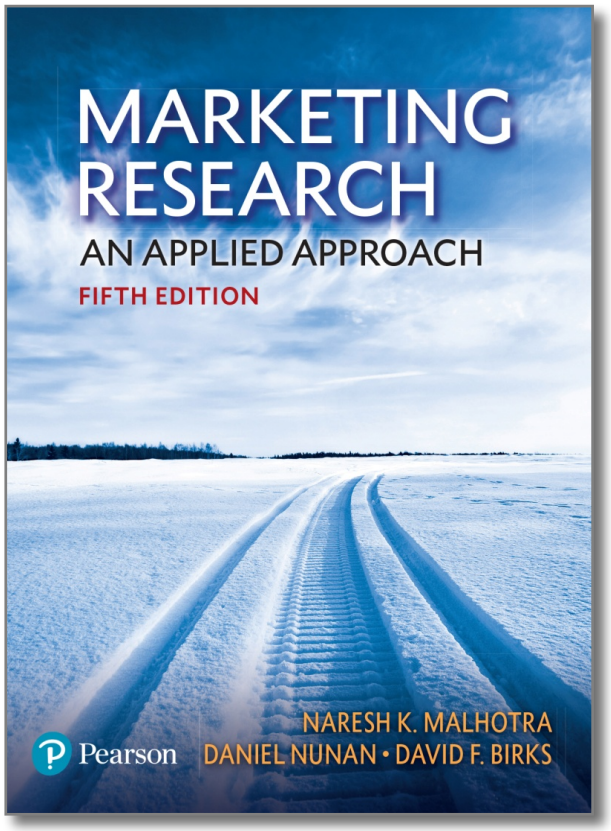
# Marketing Research
## An Applied Approach
5th edition




## Chapter 10
Survey and quantitative observation techniques

*Know exactly what you want to measure – and then select a survey or observation technique that creates cooperative participants, willing to think and be honest.*

# Chapter outline

1) Overview
2) Survey techniques
3) Online surveys
4) Telephone surveys
5) Face-to-face surveys
6) Postal surveys
7) A comparative evaluation of survey techniques
8) Mixed-mode surveys
9) Observation techniques
10) Observation techniques classified by mode of administration
11) A comparative evaluation of observation techniques.

# Overview

We focus on the major technique used in **descriptive research designs** that are **surveys** and **quantitative observation**.

Descriptive research has its prime aim the description of something, usually consumer or market characteristics.

- *Survey techniques* may be classified by the way/mode of administration as online, telephone survey, face-to-face and postal survey.
- *Observational technique:* personal observation including mystery shopping research, electronic observation and trace analysis.


# Survey methods

- They **survey method** of obtaining information is based upon the use of **structured questionnaires** to a sample of a target population. Participants may be asked a variety of questions regarding their behaviour, intention attitudes, awareness, motivations and demographic and lifestyle characteristics.
- In structured data collection a formal **questionnaire is prepared** and the **questions** are asked in a **prearranged order**.
- In a typical questionnaire, most questions are **fixed response** alter **native questions** that require the participant to select from a predetermined set of response.

| | *Strongly agree* | *Agree* | *Neutral* | *Disagree* | *Strongly disagree* |
|---|---|---|---|---|---|
| *I prefer written examinations compared with continual assessment* | ☐ | ☐ | ☐ | ☐ | ☐ |

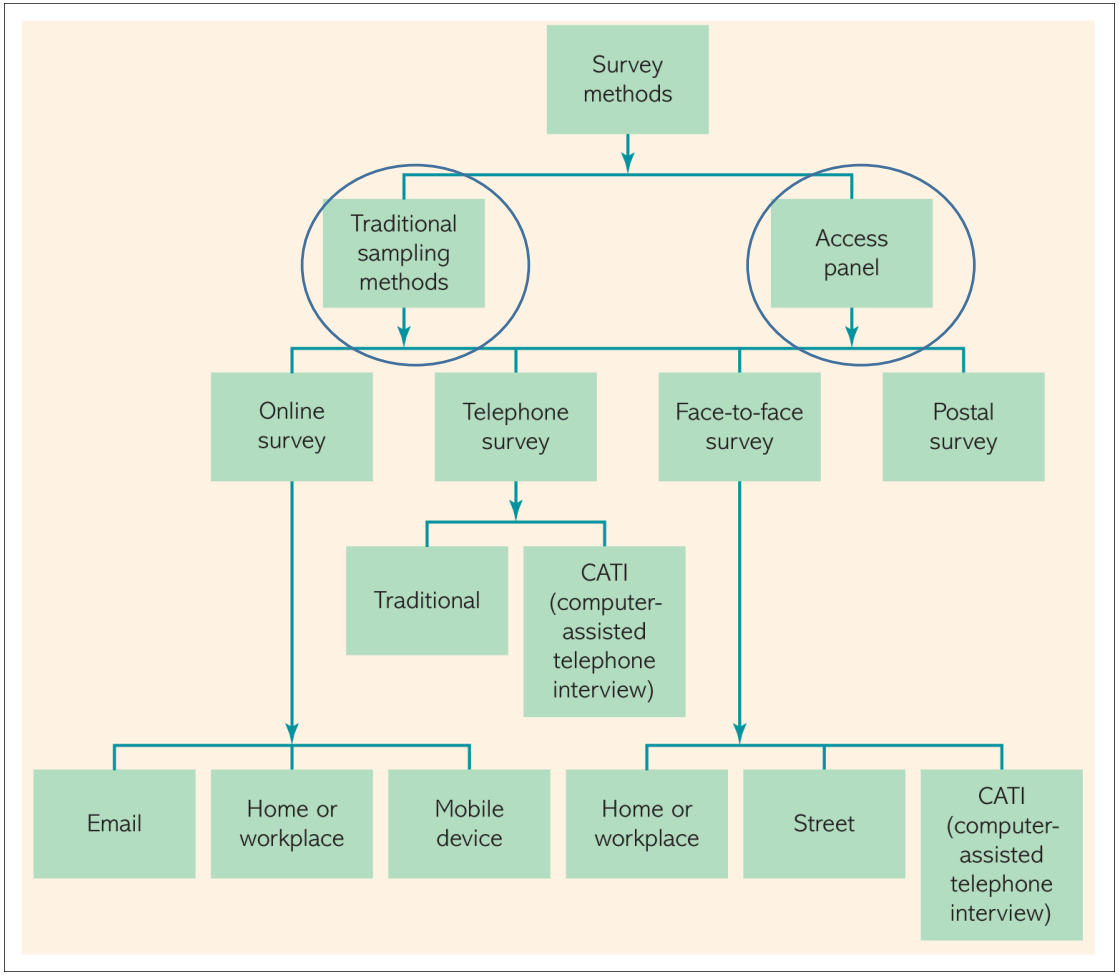
## Survey methods - Advantages

- The questionnaire is **simple** to administer
- The data obtained are **consistent** [logiche] because the responses are limited to the alternatives identified.
- The use of **fixed-response** questions reduces the **variability** in the results that may be generated by differences in interviewers.
- **Coding, analysis and interpretation** of the data are relatively simple

## Survey methods - Disadvantages

- Participants may be unable or unwilling to provide the **desired information**. It may result a loss of validity for certain type of data such as beliefs and feelings.
- Finally **wording questions** in a consistent manner to all potential survey participants is not easy. Great attention must be taken to ensure that the **language** and **logic** used in questionnaires are meaningful and valid to potential participants.

# Survey methods

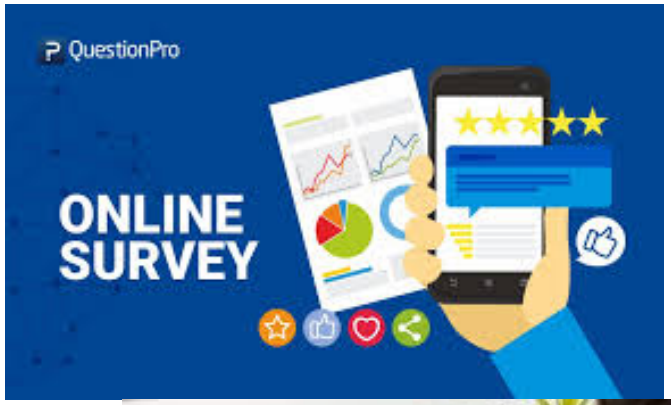


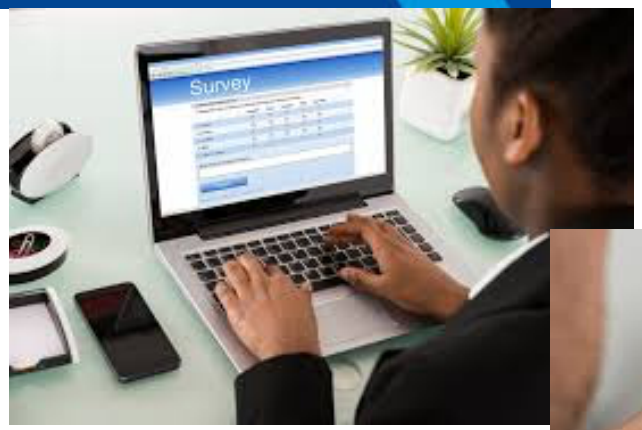

Access to survey participants may be conducted through two routes.

- The **first** is via **traditional approach** to building sampling frames (personal contact, directories, database).
- The second is via **the access panel** (researchers manage large panels of individuals who have agreed to take part in surveys that are relevant to their backgrounds, location and interests)

Survey questionnaires may be administered in four major modes: (1) *online surveys*; (2) *telephone surveys*; (3) *face-to-face surveys* and (4) *postal surveys*.

# Online surveys





- **Online surveys** can be conducted on devices in **home** or in the **workplace**. They can be administered on **mobile devices**.
- Online surveys have now become the **dominant means** of delivering survey.
- The survey experience can be designed in a personalized manner, and it can be much **cheaper** and **faster** to administer compared with traditional phone or face-to-face survey methods.

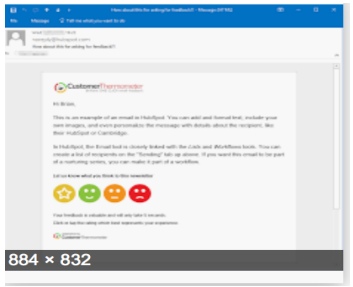
# Online survey – Happy campers

- The Research Box agency was approached by the *British Holiday & Home Parks Association* (BH&HPA) to develop an **automated means** of collecting **customer satisfaction data**.
- Membership in BH&HPA is made up of the *owners and managers of park home estates,* touring and tenting parks, caravan holiday home parks, chalet parks and self-catering accommodation.

- BH&HPA wanted to develop a single-visitor satisfaction survey that could be used by all its holiday park members. The aim was to provide all the parks with customer feedback.
- The Research Box used Snap survey software (www.snapsurveys.com) to set up a system to host and collect responses from a single survey, but one that was personalized to each individual circumstances at over 2,000 parks.
  - Questions asked were dependent on the accommodation type and facilitaties available
  - Each park had its own unique web link to its version of the survey questionnaire
  - Consumers were invited to fill our the survey online, or to complete a paper version that the park then manually entered onto the system.
  - The system was capable of collection more than 100,000 survey responses a year.
- Each month, *personalized survey reports* were automatically produced; the reports contained park-scientific analyses in the form of narrative, supported by summary tables, charts and list of comments.

# Online surveys

## E-mail surveys




- E-mail surveys can be seen as the forerunner to the development of online surveys.
- The main use of e-mail in surveys it to send invitations to complete online surveys
- The text-based e-mail surveys can be also convenient for participants as they require no facilities or expertise beyond those that they use in their day-to-day email communications.
- They may be particularly effective on mobile devises.

- To conduct an e-mail survey:
  - A *list of e-mail addresses* is first obtained.
  - The survey is *written* within the body of the e-mail message, which is then sent out over the Internet.
  - Participants *type* the answers to either questions and click “replay”.
  - Responses are then *data entered* in the manner of a postal survey or imported with software that interprets the emailed responses and reads the answers directly into a format compatible with the requirements of the software analysis package.

# Online surveys

## E-mail surveys

- E-mail surveys have several limitations, primarily being that they can appear dry and uninteresting.
- Given the advantages of other online survey methods, the popularity of the **e-mail survey** is waning.

### Send an e-mail? Err….sorry, you seem to have mistaken me for a sed "old geezer"

- E-mail is in decline as younger people switch to social networking, texting and instant messages.
- The marketing research company comScore (www.comscore.com) highlights that the under 25s are abandoning e-mail.
- Younger users say that e-mail still has its uses, for receiving their favourite newsletters or when writing formal messages to strangers.
- The likes of Facebook, Instagram and messaging platforms represent the most used forms of communication. Their use is a trend that is developing worldwide.

# Online surveys

## E-mail surveys

- In e-mail survey participants cannot be able to pass from questions where they have to choose “yes” and “no” to questions where only one response is meaningful.
- Skipping *instructions* (if the answer to question 4 is yes, go to question 9) must appear explicitly, just as on paper, as there is no automated routing.
- All these factors can *reduce the quality* of data from an e-mail survey and can require much post-survey data cleaning.
- There are also *problems* in locating accurate and current e-mail address lists and there is no guarantee that an e-mail will reach intended participants.

# Online surveys

## Online surveys using fixed and mobile devices

- Early versions of Internet surveys were labelled at **CAWI** (computer-assisted web interview) to follow previous acronysm within the research industry of CATIs (computer-assisted telephon interview) and CAPIs (computer-assisted personal interviews)
- The term "online" is now used for all Internet surveys **hosted in a website**.
- **Participants** may be recruited online from potential participant databases [**panels**] or by conventional techniques [telephone, face to face or postal]. But frequently participants are not recruited but are those who visit the **website** on which the survey is posted.

  Web surveys offer several advantages over e-mail surveys

  - It is usual to construct buttons, checkboxes and data entry fields that prevent participants from *selecting more* than *one response* where only one is intended.
  - *Skip patterns* can be programmed and performed automatically.
  - *Additional survey stimuli* such as graphical images and links to other web pages may be integrated.
  - The *visual layout* and *care taken* in designing additional stimuli can do much for participant engagement.

- Researchers are increasingly conducting online survey using *mobile devices*. The smartphone and tablet offer many possibilities as tools.

## Online surveys - Surveytainment

- Sony used a method in its online survey that is called as "*surveytainment*"
- It used eye-catching question types and technology, including audio and video clips, dra—and-drop rankings and collaborative tools.
- By using a "whiteboard" application participants could show Sony what made an attractive cover by rearranging and altering the **images** provided.
- It was possible for participants to upload their own **images** and **texts**.
- The key to making "suveytainment" effective was in ensuring that the techniques increased participant understanding. This method introduced sound and imagery into questions that would otherwise be static or require participants to rely on recall.

# Online surveys - Advantages

- **Time**: compared with other survey methods, the time taken to conduct a survey can be reduced to a matter of days rather than weeks.
- **Cost**: once the electronic questionnaire is designed, it is easy to e-mail it to 10,000 people as to 10, since there are no printing, stationary and postage costs. Preparing data for analysis needs less manual intervention and can be also much cheaper.
- **Quality of response**: design features can be used to make the survey more appealing and interesting.
- **Interviewer bias removed**. The method maintains the key advantage of postal surveys in being able to present consistent forms of measurement.
- **Data quality**: logic and validity checks can be built in, allowing the development of more personalized questionnaire designs.
- **Contacting certain target groups**. Many participants may be reluctant to complete survey by traditional methods such as postal and face-to-face surveys. With the online survey, the participants are largely in control of the context and can respond in circumstances that they feel comfortable with.

# Online survey - Disadvantages

- **Sampling frames:** there are a growing number of access panels that provide means to access particular types of participant. But some questions emerge on the representativeness and the motivations of panel members. Another sampling issue is that participants who are recruited through browsing or clicking does not know whether those who choose to take part are really representative of a target population.
- **Access to the web**: the penetration of Internet in households and businesses can still vary within countries and across countries [in the over 65s the use of Internet is limited]
- **Technical problems**: depending upon hardware and software that participants use, the questionnaire may not work as intended by designer. This is particularly true with surveys that completed on mobile devices where there are a very wide selection of screen sizes that may require more restraint in the graphic design of such surveys.

# Telephone surveys

- Telephone surveys may be categorized as traditional and computer-assisted.
- As the use of Internet increases, telephone surveys have declined.

## Traditional telephone surveys

- Traditional telephone surveys involve phoning a **sample of participants** and asking them a series of questions, using a paper questionnaire to record the responses.
- A **wide geographical area** can be covered, including international markets.
- The telephone interviewers cannot give participants any **visual prompts**.
- These surveys tend to be **short in duration** and have questions with few options as possible answers.

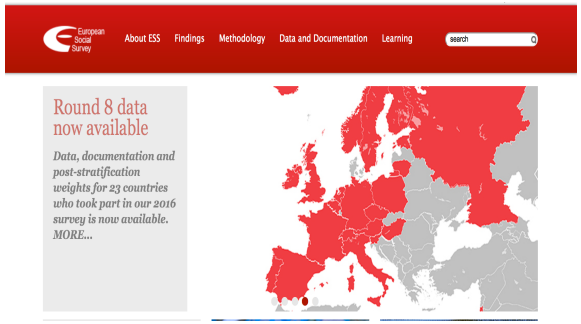
# Telephone surveys

## Computer-assisted telephone interviews (CATIs)

- CATI uses a computerized questionnaire administered to participants over the telephone with a questionnaire on a *networked computer* or a PC.
- The interviewer sits in front of a terminal and wear a small headset. The terminal replaces a paper questionnaire, and the headset substitutes for a telephone.
- The interviewers reads questions posed on the screen and records the participant's answers directly to the computer, ready for immediate analysis.
- The main benefit of CATI is the speed of collecting data and analyses. One of the most widespread use of CATI is for political opinion polls.
    - In many countries the percentage of people who only have a mobile devise is now greater than those who have a landline. It is difficult to capture these people.
    - The technique may be confused in the minds of participants with cold-call selling techniques.
    - In most businesses phone calls are screened: many businesses have set up formal procedures to minimize unnecessary calls to management.

# Face-to-face surveys

- **Face-to-face surveying methods may be categorized as home, workplace, street or computer-assisted**.
- Face-to-face surveys are in decline especially because of the costs involved.




## European social survey (www.europeansocialsurvey.org)

- It is an attitude survey carried out in over 23 countries across Europe.
- The survey started in 2001 and fieldwork is carried out from September to December every two years.
- The topics are: media consumption, political and social trust, religious identification and social demographic background data, etc..
- The hour-long survey interview is conducted face-to-face in all countries. Because of the **complexity** of the interview, the sole mode to be used is face-to-face interview.
- Data collection might now need to be reconsidered in view of its rising cost and diminishing response rate

# Face-to-face surveys

## Home and workplace survey

- Participants are interviewed face-to-face in their “personal space”.
- The use of face-to-face home and workplace surveys has declined due to their high cost.
- There are situations where they are used because of the reassurances of **quality** of the interview process, the **comfort** of the context felt and the **nature of the questions** made.
- There are used in business-to-business research for participant subjects who cannot be effectively interviewed by telephone or post.

## Street surveys

- Participants are identifies while they are shopping in **city centres** or in **shopping centres**. They may be questioned there and then in the street or taken to a specific test facility.
- They are used to test new product formulations, merchandising ideas and other forms of marketing communications.
- The big advantage of the street survey is that it is more efficient for the participant to come to the interviewer than for the interviewer to go to the participant.

# Face-to-face surveys

## Computer-assisted personal interviews (CAPIs)

- In CAPI, we attend the use of a *computer* which replaces the interviewer.
- There are several user-friendly software package that design easy-to-use survey with help screens and understandable instructions.
- The use of colour, graphical images and on-and off screen stimuli can contribute to making the interview process both interesting and stimulating.
- The interviewer is usually present to guide the participant along the interview.
- It may be used to collect data from street surveys, from home and workplace surveys.

# Postal surveys

- Questionnaires are mailed to preselected potential participants. As with other forms of "offline" market research, postal surveys have sharply declined in use.
- There is no verbal interaction between the researcher and the participant in the survey process.

- There may be an initial contact with potential participants, to establish the correct person to send the questionnaire to, and to motivate them before they receive the survey.
- Before data collection can begin, potential participants can be identified. An initial task is to obtain a valid mailing list.
- The researcher must also make decisions about the various elements of the postal survey package.

| | |
|---|---|
| **Outgoing envelope** | Method of addressing; envelope size; colour; postage |
| **Covering letter** | Personalisation; sponsorship; type of appeal; signature |
| **Questionnaire** | Size, length and content; colour and layout; format and reproduction; participant anonymity |
| **Instructions** | As part of covering letter; a separate sheet; alongside individual questions |
| **Return envelope** | Whether to include one; type of envelope; postage |
| **Incentives** | Feedback of findings; monetary v. non-monetary; prepaid v. promised amount |

# A comparative evaluation of survey methods

**The researcher should conduct a comparative evaluation to determine which techniques are appropriate.**

## **Task factors:** relate to *tasks* that have to be performed to collect the data and to the topic of the survey

**Flexibility of data collection:** it is determined by the extent to which the participant can interact with the interviewer and the survey questionnaire. The **face-to-face survey** affords a **very high flexibility** of the form of data collection. Because the participant and the interviewer meet face-to-face, the interviewer can administer complex questionnaires, explain, clarify difficult questions and use unstructured questions. **CATI/telephone, CAPI and online survey** allow great flexibility because the researcher can use various question formats, personalize questionnaire and handle more complex skip patterns.

**Diversity of questions:** it depends on the degree of interaction that the participant has with the interviewer and the questionnaire, as well as the participant's ability to see the questions.

- **Home and office surveys**, **street interviews** and **CAPI** allow for diversity.
- In **online surveys, multimedia capabilities** can be used and so the ability to ask to diverse set of questions is moderate to high, despite the absence of an interviewer.
- In **postal surveys** and **e-mail surveys**, less diversity is possible.
- In **traditional telephone** survey and CATI, the participant cannot see the questions while answering and this limits the diversity.

| | Email | Online | Telephone CATI | Home and workplace | Street surveys | CAPI | Postal |
|---|---|---|---|---|---|---|---|
| Flexibility of data collection | * | **** | **** | ***** | ***** | **** | * |
| Diversity of questions | *** | **** | * | ***** | ***** | ***** | *** |
| Use of physical stimuli | * | *** | * | **** | ***** | ***** | *** |
| Sample control | * | ** | **** | **** | **** | *** | * |
| Quantity of data | *** | **** | ** | *** | *** | *** | ** |
| Response rate | * | ** | *** | ***** | **** | ***** | * |

(key: low = *, moderate to low = **, moderate = ***, moderate to high = ****, high = *****)

# A comparative evaluation of survey methods

**Task factors:** relate to *tasks* that have to be performed to collect the data and to the topic of the survey

**Use of physical stimuli:** it is relate to the use of physical stimuli such as products, product prototypes, commercial of promotional displays during an interview.

- **Face-to-face surveys** conducted at central locations (**street surveys and CAPI**) are preferable to home surveys.
- **Postal surveys** are moderate on this dimension because sometimes it is possible to mail product samples.
- **Online surveys** are moderately suitable, because the questionnaire can include multimedia elements such as **prototype web pages** and **advertisement**.
- The use of **physical stimuli** is limited in **traditional telephone surveys** and **CATIs** as well as in **email surveys** (depending on the ability of participants to open attachments).

| | Email | Online | Telephone CATI | Home and workplace | Street surveys | CAPI | Postal |
|---|---|---|---|---|---|---|---|
| Flexibility of data collection | * | **** | **** | ***** | ***** | **** | * |
| Diversity of questions | *** | **** | * | ***** | ***** | ***** | *** |
| Use of physical stimuli | * | *** | * | **** | ***** | ***** | *** |
| Sample control | * | ** | **** | **** | **** | *** | * |
| Quantity of data | *** | **** | ** | *** | *** | *** | ** |
| Response rate | * | ** | *** | ***** | **** | ***** | * |

(key: low = *, moderate to low = **, moderate = ***, moderate to high = ****, high = *****)

**Sample control:** is the ability of the survey to reach participants specified in the sample effectively and efficiently

- **Face-to-face surveys** offer the best sample control. It is possible to control which sampling units or participants are interviewed.
- **Street interviews** allow a moderate degree of sample control: the choice is limited to individuals who are walking down the street or through a shopping center.
- **Telephone survey** and **CATIs** allow moderate to high sampling control. Telephones offer access to geographically dispersed participants and hard-to-reach areas.
- **Online** and **postal surveys** are realized through **panel access**. Without panel access the degree of sample control is limited. It cannot be controlled if the questionnaire is answered and who answers it.

# A comparative evaluation of survey methods

**Task factors:** relate to *tasks* that have to be performed to collect the data and to the topic of the survey

**Quantity of data:** workplace face-to-face surveys allow the researcher to collect relatively large amounts of data.

- **Home** and **workplace face-to-face** surveys allow the researcher to collect relatively large amount of data (75 minutes is the duration of a face-to-face survey)
- **Street surveys** and CAPIs provide moderate amounts of data because the participant's time is limited (the interview time is 20 minutes or less)
- **Postal surveys** use short questionnaires and the amount of data is limited. The same is true for e-mail and **online** survey although online is a better medium in this respect.
- Traditional telephone surveys, CATIs use short questionnaires and data collected are limited.

| | Email | Online | Telephone CATI | Home and workplace | Street surveys | CAPI | Postal |
|---|---|---|---|---|---|---|---|
| Flexibility of data collection | * | **** | **** | ***** | ***** | **** | * |
| Diversity of questions | *** | **** | * | ***** | ***** | ***** | *** |
| Use of physical stimuli | * | *** | * | **** | ***** | ***** | *** |
| Sample control | * | ** | **** | **** | **** | *** | * |
| Quantity of data | *** | **** | ** | *** | *** | *** | ** |
| Response rate | * | ** | *** | ***** | **** | ***** | * |

(key: low = *, moderate to low = **, moderate = ***, moderate to high = ****, high = *****)

**Response rate:** is defined as the percentage of the total attempted interviews that are completed

- **Face-to-face, home and workplace**, street and CAPI surveys yield the highest response rate (typically between 40% and 80%)
- **Telephone surveys, traditional and CATI** can yield response rates between 40% and 50%.
- **Postal surveys** have a poor response rates (less than 15%)
- **Online surveys** can have a very poor response rate (under 10%).

# A comparative evaluation of survey methods

**Situational factors:** the researchers has to balance the need to control accurate and high-quality data with the budget and time constraints.

**Control of the data-collection environment**: The degree of control a researcher has over the environment differentiates in the various survey modes

- **Face-to-face survey** conducted at central locations (from street surveys and CAPIs) offer the greatest degree of environment control (the researcher can make product demonstrations)
- **Home and workplace face-to-face surveys** offer moderate to high control because the interviewer is present.
- **Traditional telephone surveys** and **CATI's** offer moderate control: the interviewer cannot see the environment in which the interview is being conducted but can see the background conditions and encourage the participant.
- **In postal surveys**, **email and online su**rveys the researcher has no control over the environment.

| | Email | Online | Telephone CATI | Home and workplace | Street surveys | CAPI | Postal |
|---|---|---|---|---|---|---|---|
| Control of data-collection environment | * | * | *** | **** | ***** | ***** | * |
| Control of field force | ***** | ***** | *** | * | *** | *** | ***** |
| Potential for interviewer bias | None | None | *** | ***** | ***** | * | None |
| Potential to probe participants | * | * | * | ***** | *** | *** | * |
| Potential to build rapport | * | * | *** | ***** | **** | **** | * |
| Speed | ***** | ***** | ***** | **** | *** | **** | * |

(key: low = *, moderate to low = **, moderate = ***, moderate to high = ****, high = *****)

**Control of field force**: consists of interviewers and supervisors involved in data collection.

- Because they require no such personnel, postal surveys, email and online surveys eliminate field force problems.
- Traditional telephone survey, CATIs, street surveys and CAPIs all offer moderate degrees of control because the interviews are conducted at a central location
- Home and workplace face-to-face surveys are problematic in this respect.

# A comparative evaluation of survey methods

**Situational factors:** the researchers has to balance the need to control accurate and high-quality data with the budget and time constraints.

**Potential for interviewer bias** emerges from the manner in which the interviewer: (a) selects participants; (b) asks research questions (omitting questions); (c) poses questions in another way when participants do not understand the question; (d) probes (by offering examples to encourage participants); (e) records answers (recording an answer incorrectly).

- **Home, workplace and street face-to-face surveys** are highly susceptible to interviewer bias.
- **Traditional telephone surveys and CATIs** are less susceptible
- **Postal surveys, e-mail and online surveys** are free of it.

| | Email | Online | Telephone CATI | Home and workplace | Street surveys | CAPI | Postal |
|---|---|---|---|---|---|---|---|
| Control of data-collection environment | * | * | *** | **** | ***** | ***** | * |
| Control of field force | ***** | ***** | *** | * | *** | *** | ***** |
| Potential for interviewer bias | None | None | *** | ***** | ***** | * | None |
| Potential to probe participants | * | * | * | ***** | *** | *** | * |
| Potential to build rapport | * | * | *** | ***** | **** | **** | * |
| Speed | ***** | ***** | ***** | **** | *** | **** | * |

(key: low = *, moderate to low = **, moderate = ***, moderate to high = ****, high = *****)

**Potential to probe participants:** workplace and street face-to-face surveys have great potential for probing questions. Traditional telephone surveys and CATIs can also probe but not the same extent as being face-to-face. CAPIs have limited potential to probe, through particular routines can be built into a surveys to ask for further details.

# A comparative evaluation of survey methods

**Situational factors:** the researchers has to balance the need to control accurate and high-quality data with the budget and time constraints.

- **Potential to build rapport** includes the amount of rapport that can be built up with participants.
- **Home, workplace and street face-to-face surveys** have great potential to build up rapport with participants.
- **Traditional telephone surveys and CATIs** can also develop rapport but not to the same extent as being face to face.
- **CAPIs** has limited potential to build up rapport through particular graphics and messages that can be built into a survey.
- **Postal surveys, e-mail and online surveys** have very limited means to build up a rapport with participants.

| | Email | Online | Telephone CATI | Home and workplace | Street surveys | CAPI | Postal |
|---|---|---|---|---|---|---|---|
| Control of data-collection environment | * | * | *** | **** | ***** | ***** | * |
| Control of field force | ***** | ***** | *** | * | *** | *** | ***** |
| Potential for interviewer bias | None | None | *** | ***** | ***** | * | None |
| Potential to probe participants | * | * | * | ***** | *** | *** | * |
| Potential to build rapport | * | * | *** | ***** | **** | **** | * |
| Speed | ***** | ***** | ***** | **** | *** | **** | * |

(key: low = *, moderate to low = **, moderate = ***, moderate to high = ****, high = *****)

**Speed:** speed with which a questionnaire can be created, distributed and the data returned.

- **Online surveys** can be a fast method of obtaining data from a large number of participants
- The **email survey** is also fast, although slower than the online survey since more time is needed to compile an email list and data entry is also required.
- Next in speed are street and CAPI survey that reach potential participants in central locations.
- Home face-to-face surveys are slower because there is dead time between interviews while the interviewer travel to next participant.
- Postal surveys are typically the slowest.

# A comparative evaluation of survey methods

**Situational factors:** the researchers has to balance the need to control accurate and high-quality data with the budget and time constraints.

## Low cost

- The cost of online surveys is the lowest.
- Printing, mailing, keying and interviewer costs are eliminated
- **Face-to-face surveys** tend to be the most **expensive** mode of data collection per completed response whereas the **postal surveys** tend to be the least expensive.
- In general the cost increases from online to e-mail, postal, traditional telephone, CATI, CAPI, street and finally, face-to-face home and workplace surveys.

| | Email | Online | Telephone CATI | Home and workplace | Street surveys | CAPI | Postal |
|---|---|---|---|---|---|---|---|
| Low cost | ***** | ***** | *** | * | ** | ** | **** |
| Perceived participant anonymity | *** | ***** | *** | * | * | * | ***** |
| Social desirability | ***** | ***** | *** | ** | * | **** | ***** |
| Obtaining sensitive information | *** | *** | * | ***** | * | *** | *** |
| Low incidence rate | *** | ***** | ***** | * | * | * | *** |
| Participant control | ***** | **** | ** | * | * | * | ***** |

(key: low = *, moderate to low = **, moderate = ***, moderate to high = ****, high = *****)

# A comparative evaluation of survey methods

**Participant factors:** participant characteristics have to be considered when selecting a survey method

## Perceived participant anonymity:

participant's perceptions that their identities will not be discerned by the interviewer.

- **Perceived anonymity** of the participant is high in postal surveys and online surveys because there is no contact with an interviewer while responding.
- It is low **in face-to-face surveys** (home, street and CAPI) due to face-to-face contact with the inteviewer.
- **Traditional telephone** surveys and CATIs fall in the middle. It is also moderate **with e-mail.**

| | Email | Online | Telephone CATI | Home and workplace | Street surveys | CAPI | Postal |
|---|---|---|---|---|---|---|---|
| Low cost | ***** | ***** | *** | * | ** | ** | **** |
| Perceived participant anonymity | *** | ***** | *** | * | * | * | ***** |
| Social desirability | ***** | ***** | *** | ** | * | **** | ***** |
| Obtaining sensitive information | *** | *** | * | ***** | * | *** | *** |
| Low incidence rate | *** | ***** | ***** | * | * | * | *** |
| Participant control | ***** | **** | ** | * | * | * | ***** |

(key: low = *, moderate to low = **, moderate = ***, moderate to high = ****, high = *****)

**Social desirability:** is the tendency of participants to give answers that they feel to be acceptable in front of others, including interviewers.

- Because postal and online surveys do not involve any social interaction between the interviewer and participant, they are least susceptible to **social desirability**.
- **Traditional telephone** survey and **CATI**s are moderately good because there is not a face-to-face relation.
- The weakest technique are face-to-face surveys even though in the case of home and workplace surveys the chance to build up a rapport with participant may nurture them to reveal how they really feel.
- The best technique in terms of reduced social desirability is **postal survey**.

# A comparative evaluation of survey methods

**Participant factors:** participant characteristics have to be considered when selecting a survey method

## Obtaining sensitive information:

- **Home and workplace surveys** allow the time and context to build up explanations and reassure participants.
- For some issues, participants may not wish to face any interviewer and would like to complete the survey alone. **CAPI** can be set up so that the interviewer introduces the participant to a terminal and then leaves the participant to get on with the on-screen interview.
- **Postal and online surveys** can be seen as moderately successful in handling sensitive questions.
- For **telephone and street survey**, the interviewer can reassure the participant about the questions being asked, but may not have the time and context really to relax participants and overcome any embarrassment.

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|---|---|---|---|---|---|---|---|
| Low cost | ***** | ***** | *** | * | ** | ** | **** |
| Perceived participant anonymity | *** | ***** | *** | * | * | * | ***** |
| Social desirability | ***** | ***** | *** | ** | * | **** | ***** |
| Obtaining sensitive information | *** | *** | * | ***** | * | *** | *** |
| Low incidence rate | *** | ***** | ***** | * | * | * | *** |
| Participant control | ***** | **** | ** | * | * | * | ***** |

(key: low = *, moderate to low = **, moderate = ***, moderate to high = ****, high = *****)

**Low incidence rate:** determines how many contacts need to be screened for a given sample-size requirement.

- The **telephone survey** can be very effective as a method of screening potential participants to determine eligibility; all it takes is a phone call.
- **Face-to-face methods** are all inefficient because the interviewer has to make personal contact with potential participants.
- **Postal surveys** and **e-mail** are moderate in terms of efficiency as they are relatively low cost and can be used to contact a large number of potential participants.
- **Online surveys** are very good in terms of low incidence rate.

# A comparative evaluation of survey methods

**Participant factors:** participant characteristics have to be considered when selecting a survey method

**Participant control:** methods that allow participant control over the interviewing process can solicit greater **cooperation** and **engagement**.

- Two aspects of control are important. The first one is control over when to answer the survey and the flexibility to answer it in parts at different times and even via different modes. The second aspect of control pertains to the ability of the participants to regulate the rate and pace at which they answer the survey.
- **Postal surveys and e-mail** are the best in giving this control to participants.
- **Online surveys** can be designed to allow participants to come back and complete them.
- The pace of telephone survey is regulated by the interviewer and although the telephone call can be rescheduled, the participant must commit to a specific time.
- With **face-to-face methods** the pace is regulated by the interviewer and generally the interview cannot be rescheduled.

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| Perceived participant anonymity | *** | ***** | *** | * | * | * | ***** |
| Social desirability | ***** | ***** | *** | ** | * | **** | ***** |
| Obtaining sensitive information | *** | *** | * | ***** | * | *** | *** |
| Low incidence rate | *** | ***** | ***** | * | * | * | *** |
| Participant control | ***** | **** | ** | * | * | * | ***** |

(key: low = *, moderate to low = **, moderate = ***, moderate to high = ****, high = *****)

# Mixed-mode survey

- No survey method is superior in all situations
- The various data collection modes are not mutually exclusive, but can be employed in a complementary fashion to build on each other's strengths and compensate for each other's weakness.
- With the growth in the use of e-mail and the internet as a means of communication, online methods have become the most feasible and popular means of conducting surveys.
- Where online methods are not appropriate for particular types of participant, a choice can be made by individual participants to select the survey method that they prefer.

# Observation techniques

Quantitative observation techniques are used in descriptive research. Observation involves recording the behavioral patterns of people, objects and events in a systematic manner to obtain information about the phenomenon of interest.

## Structured observation

- The researcher specifies in detail **what** is to be observed and how the measurements are to be recorded.
- This reduces the potential for observer bias and enhances the reliability of data.
- For example, the researcher may measure the ratio of visitors to buyers in a store. The researcher could observe and count the *number of individuals* who enter the store and the *number who make a purchase*. Counting people who enter a shop could be a manual observation and could have a sense to count visitors "if they actually look at any of the products on display".

## Unstructured observation

- The observer monitors **all aspects** of the phenomenon that seem relevant to the problem at hand, such as observing children playing with new toys and trying to understand what activities they enjoy the most.
- This form of observation can be used when a research problem has yet to be formulated precisely and when flexibility is needed in observation to identify essential components of the problems.

# Observation techniques

**Disguised versus undisguised observation**

- In disguised [mascherata] observation, the participants are unaware that they are being observed.
- Participants behave naturally because they behave not to be observed
- One of the most widespread technique of observation is through the use of mystery shopper.

**Natural versus contrived observation**

- Natural observation involves observing behaviour as it takes place in the environment.
- For example, one could observe the behaviour of participants eating a new menu option in a pizza restaurant.
- In contrived [artificiosa] observation, participant's bahaviour is observed in an artificial environment, such as a test kitchen.
- The advantage of natural observation is that the observed phenomenon will more accurately reflect the true phenomenon as the behaviour occurs in a context that feels natural to the participant

# Observation techniques classified by mode of aministration

**Personal observation**

A researchers observes actual behaviour as it occurs. The observer does not attempt to control or manipulate the phenomenon being observed but merely records what takes place [a researcher might record the time, day and number of shoppers who enter a shop and observe where those shoppers flow once they are in the shop].

# Observation techniques classified by mode of administration

**Electronic observation**

In electronic observation, electronic devices rather than human observers record the phenomenon being observed.

Of the electronic devices that do not require participants' direct participant is Nielsen **audimeter**. The audimeter is attached to a TV set to record continually the channel to which a set is tuned. People meter is another electronic device: it attempts to measure not only the channels to which a set is tuned, but also who is watching.

- Another device is the **eye-tracking equipment**. It records the gaze movement of the eye. These devices can be used to determine how a participant reads an advertisement or views a TV commercial and for how long the participant looks at various parts of the stimulus.
- **Neuromarketing** is concerned with the direct measurement of the brain's conscious and unconscious responses to marketing stimuli. It involves the measurement of a participant's brain activity through quantitative electroencephalography (qEEG).
- The **psycho-galvometer** measures galvanic skin response (GSR) or changes in the electrical resistance of the skin. The participant is fitted with small electrodes that monitor electrical resistance and is shown stimuli as advertisements, packages and slogans. The theory behind this device it that psychological changes, such as increased perspiration [sudorazione] , accompany emotional reactions.

## Observation techniques classified by mode of administration

- **Voice-pitch analysis** measures emotional reactions through changes in the participant's voice. Changes in the relative vibration frequency of the human voice that accompany emotional reaction are measured with audio-adapted computer equipment.
- **Response latency** is the time a participant takes before answering a question. It is used as a measure of the relative preference for various alternatives. Response time is thought to be directly related to uncertainty. The longer a participant takes to choose between two alternatives, the closer the alternatives are in terms of preference.

## Advantages of observation techniques

- The greatest advantage of observational techniques is that they permit measurement of actual behavior rather than reports of intended or preferred behaviour.
- There is no reporting bias and potential bias caused by the interviewer and interviewing process is elimitated.

## Disadvantage of observation techniques

- Little is known about the underlying motives, beliefs, attitudes and preferences.
- Observational data can be time-consuming and expensive to collect.
- In some cases, such as in the use of hidden cameras, the use of observational techniques may be considered unethical.