

**Guidelines for commissioning
an interview survey
from a research company**

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Introduction

These notes are designed to be of use to a researcher who decides that he must contract out the fieldwork and primary data analysis to a research company to do it for him. The aim is to ensure that the researcher does not stand aloof from the nuts and bolts of data collection, but retains control by knowing about and, where necessary, clearly specifying details at all the stages of a survey's progress.

This is necessarily a rather nit-picking document, but it is not intended to suggest that the commercial companies are not to be trusted. Most want to do a good job within the limits of the funds available to them, but survey research is costly and complex. Just consider what you are asking them to do for you; you want them to send off an army of housewives with highly formal questions which both they and the respondent will often find irrelevant or uninteresting to carry out an extremely difficult job of eliciting responses from the population at large, in such a way that they can be reliably coded and analysed. Unless things are spelt out in detail there will be bound to be misunderstandings.

But paying attention to all these details in the specification, contract or anywhere is no guarantee of satisfaction. The researcher must establish a good working relationship with the agency he is dealing with. None of the main research companies will resent detailed specification and the researcher retaining an active and close check on each stage of the survey, so long as he makes arrangements to do this through established communication channels with the company.

It is assumed that these notes will be mainly of interest to researchers who will want to be responsible for the content of the questionnaire and the analysis of the data themselves. Under special conditions people may want to contract out part of this also, so reference will briefly be made to some of the problems here, but it should be noted that if the research company is to analyse the data, their executives will have to be much more fully involved in the design stages.

The researcher may like to consider whether it is worth his while using the expertise in his university or establishment for the skilled design parts of the process, and train students for the more repetitive jobs of sampling, interviewing and coding. There will almost certainly be statisticians to hand to help design a sample, but there may be difficulty finding expertise in questionnaire design and layout, and there will almost certainly be no alternative to the researcher actually training his field-force himself.

This is a large undertaking and is only really worth the effort if you are convinced that commercial companies' training does not equip the interviewer for the kind of task you have in mind. For instance, people surveying income and expenditure have had to recruit and train their own fieldforce in special techniques for extracting accurate income information. Students need just as much careful training as middle-aged housewives, and care must be taken to remove those who are prone to be congenitally incapable of just listening and recording. Research findings have shown that inexperienced interviewers are less reliable than trained ones, and are certainly less successful at obtaining interviews. However, not many surveys warrant this amount of effort, and from now on, we shall assume that the researcher is going to approach a commercial company to do the fieldwork and related parts of the survey.

These notes start by making some general points about dealing with market research companies, and then go through the various stages of a survey, pointing to the kind of details that the researcher might not have considered, but which will affect costings and quality considerably. Not all the points made throughout the document need to be specified in detail in the tender, nor could they be; rarely is there such a well-planned survey that no items remained to be decided on at the fieldwork stage - such a survey would be planned to the point of being inflexible. However, the earlier thought is given to these details, the better.

How to draw up a short list of companies to invite to tender

If you do not know the names of any research companies, there are lists of companies which do this kind of research. The Market Research Society might be a good place to start. This is an organisation whose full members have recognised competence in the sphere of market research, and who are bound by the rules in the Society's Code of Conduct. This should be read by anyone unfamiliar with it; you will notice that there are rules of conduct which members must comply with, and suggested "good practices" which are recommended, but not compulsory. We suggest that you should think it compulsory to find a

company which complies with the "good practices" also. But this is a problem, because since organisations as such do not affiliate to MRS, professional control is only exerted through the rule in the Code which states: "where the Code refers to organisations, it is incumbent on individual members in these organisations to ensure to the best of their ability that the organisation fulfills the Code in this respect". In other words you never have a foolproof guarantee that any organisation will be following the Code.

The MRS annually produces a list, "Organisations providing market research services in GB" which may be obtained from them at 51 Charles St. London W1X 7PA. This will give you a brief introduction to commissioning research and then list companies in which members work, naming the members, listing the services offered and type of research performed by each company and the approximate annual turnover of the company. This last point is important - you do not want to lodge a £25,000 job with a £100 company. (See Appendix 1)

The list of members of the Association of Market Survey Organisations, (AMSO) will provide you with a set of the larger survey organisations, and their Rules of Conduct do have the advantage of binding the whole organisation. However their rules are not so stringent as those of the MRS. The Industrial Market Research Association (IMRA) also produce a directory of European companies offering these services. This can be obtained from them at 11 Bird St. Lichfield, Staffordshire. Social and Community Planning Research, a large company offering research facilities in this field, does not appear on any of these lists because they do not do specifically market research.

Your initial task will therefore be to select a reasonable number of companies from whom or about whom you will seek more information, in order that eventually you will be in a position to invite a few companies to tender for your job. It is very important to go through this stage first; you cannot merely demand standards in your specification and expect any company to be able to meet them. Good quality comes from the continual process of training and retraining, monitoring and supervision over all the projects that an agency undertakes. Since the MRS recommend that only 2-4 invitations to different companies to tender be made, (companies will only produce shabby tenders if they are inundated with too many invitations), it is important that the researcher should feel happy that these selected companies are capable of doing the kind of job he wants.

