

CHAPTER 7

INTERVIEWER INSTRUCTIONS



Keeping a record of contacts

In most surveys it is important to keep a tally of who has been contacted when attempting to achieve the interviews. Street interviews are an exception as here the interviewer usually only keeps a count of the people interviewed as a match against the quota which is being sought. In most other circumstances, interviewers either have to find an appropriate respondent or are given a list of people to interview and the *contact sheet* provides a useful mechanism for keeping orderly records on the resulting success or otherwise.

Typical Contact Sheet

Job Number:		Project Name:				
Respondent's name	Address	Date/time of calling			Result	
		1 st call	2 nd call	3 rd call	Interview (tick)	Reason for non-interview



The contact sheet does a number of things:

- It is a means of distributing work to a number of interviewers as the names of companies or people to interview can be written on to each sheet.
- It is somewhere to write down details on respondents who are being tracked down but where the details of the interview have yet to be confirmed. In most studies it is reasonable to try to get hold of a respondent up to three times and each occasion should be at a different time and date (unless, of course, a special arrangement has been made). These details could be written onto the questionnaire itself or on separate pieces of paper but it is usually better to keep all the interview planning information together so that it can be easily referred to and subsequently analysed (see the next point).
- At the end of a study the researcher may want to see what proportion of the contacts resulted in an interview and how many failed because of refusal, being inappropriate, never being there even after three calls etc. This information on 'strike rates' may have a direct input in the survey. For example, from contact sheets it would be possible to calculate how many people or companies do use a product and how many do not (the latter being inappropriate for interview) and this proportion may have considerable value in the study.

Calculating the response rates on studies is also of importance in gauging the robustness of the sample. Where the strike rate of interviews is around the 50% mark or lower (after stripping out the non eligible respondents) the researcher should become concerned about the representativeness of the sample. In most studies a strike rate of around 60% to 80% would be considered reasonable and this can be determined from the contact sheets.

Laying out the instructions

Questionnaires are usually administered by someone other than their designer. The interviewer (or in the case of self-completion questionnaires the respondent him or herself), needs clear guidance what to do at every stage. These instructions need to be differentiated from the text either by capital letters, emboldened or underlined type. There are no rigid conventions in the industry and researchers can choose any style of differentiating instructions they like. However, it is helpful if the instructions are in a consistent format in the same questionnaire so that the interviewer becomes familiar them.

We have already seen a number of examples of instructions in questions, typical of which is the following:

Q10A I will now read out some factors which may have influenced your choice of the Prelude. After I have read them out would you tell me which was most important in causing you to put the Prelude on your shopping list. **ROTATE LIST, FACTORS 1-6. TICK START**

Q10B And what was second in importance?


	10A First Mention	10B Second Mention
An advert	1	1
Recommendation	2	2
A road test report	3	3
Previous ownership of a Prelude	4	4
Previously driven or been a passenger in a Prelude	5	5
Seen the Prelude when driving about	6	6

Other _____

In the above example there are two important instructions. The first is that the interviewer is told to rotate the order of the list of factors for otherwise there would be a danger that the first factor will turn out to be mentioned most frequently in view of its privileged position in the listing. The second instruction tells the interviewer to tick the place at which the rotation started. This is as a reminder to the interviewer to rotate and it acts as a check for the researcher who is controlling the study.

The Introduction

The introduction to the interview is critical in winning the interest and co-operation of the respondent and to ensure that the right person has been obtained for questioning. It is not good enough to leave this to the interviewers, no matter how well briefed. The researcher needs to think through the precise way the interview should be introduced and produce a script which is part of the questionnaire.



The introduction aims to do three things:

1. Set the scene so that the respondent knows what is happening. It would be stated that the interview is for market research purposes only and frequently it is appropriate to give assurances of confidentiality.
2. Engage the interest of the respondent. The study will be all the more accurate if it has a high response rate and the introduction is the opportunity to "sell it in".
3. Ensure that the right person has been chosen for interview. Since good research is about asking the right question of the right person, this is the point at which to check that the right person has been selected.

In theory the introduction should be administered as quickly as possible as it is advantageous to move the respondent straight into interviewing mode. Once the questions have started, people rarely give up.

Introductions have to be made over the telephone, in the street or on a doorstep and in these conditions it can stretch the respondent's patience to spend too much time explaining the whys and wherefores. A balance needs to be struck between covering all the issues and getting down to questioning in the shortest possible time.

Below is an example of an introduction which was used in a survey carried out amongst buyers of Honda Prelude cars. The interview was administered by telephone and was part of a study covering 10 countries.

HONDA PRELUDE STUDY

ASK TO SPEAK TO THE PRINCIPAL DRIVER OF THE PRELUDE. THE INTERVIEW MUST BE WITH THE PRINCIPAL DRIVER. Hello. My name is and I am from Business & Market Research, an international market research company working for Honda. It is part of Honda's policy to speak to a sample of car owners to find out what they think about Honda cars. I understand that you have recently bought a Prelude. Can I check that you are the principal driver. I would appreciate it if you could help me with a few simple questions. It will take around 15 minutes and any replies you give will be totally confidential. Only the pooled analysis will be passed to Honda. Thank you. First of all can I confirm that you had a major influence on the choice of the Prelude. **IF NOT, THANK AND CLOSE.**

Q1 Which model of Prelude did you eventually buy? **CLARIFY MODEL**

2.0 EX	1
2.0 EX Classic	2
2.0 EX 4 Wheel Steer (4WS)	3
2.0i 16	4
2.0i 16 4WS	5
2.0i 16 4WS SE	6
2.0i 16 Classic	7
Other _____	

Following the introduction, the first question in a survey should be simple and straightforward for the respondent. In the above case, everyone was able to state the model of car they had bought and the question clicked people's minds into thinking about the subject of the investigation.

Routing

Unless stated otherwise, the interviewer will proceed from question to question. However, there will be frequent occasions when an answer to a certain question requires a special line of further questioning which is not appropriate for everyone.


The interviewer is directed to the next question by an instruction which is known as a *routing*, a *filter* or a *skip*. The key to successful routing is to take the respondent swiftly and smoothly to the next question without a break or hesitation.

As with all the instructions in the questionnaire, there should be some common convention in type style and it is usual to use capitals.

Q47 Thank you very much, that has been very helpful. Let me tell you that this survey is being sponsored by Johnson Matthey. Have you ever dealt with the company?

Yes	1	ASK Q48
No	2	SKIP TO Q50

Questions 48 and 49 in the survey addressed respondents who had used Johnson Matthey and asked how long it was since they had dealt with the company and who they had dealt with. In question 50 everyone came back together,



irrespective of whether they had dealt with Johnson Matthey, and were asked what they thought of the company.

Probing

Free ranging responses to open ended questions are sometimes lacking in depth or require further explanation to be meaningful. For example, the question "What do you think of Johnson Matthey as a company", may solicit the answer "Very good, I like them." This may tell us that Johnson Matthey is considered in a good light but that is about all we have learned. An explanation is needed as to why. Interviewers are taught to probe deeper following all open ended responses using further questions such as:

- Why did you say that?
- Is there anything else?
- What made you say that?
- Tell me more about that?
- That is interesting, what lies behind your answer?

And in response to a question which asked for the recall of something - such as names of companies, brands, or points which were remembered in an advert:

- Any others?

The interviewer instruction would be in capitals and may simply say PROBE.

Q55 What, above all else, comes to mind when you think of Johnson Matthey?
PROBE

Sometimes there are issues which it is hoped will come out in open ended questioning but, should this not be the case, they can be teased out with specific probes. For example:

Q42 What do you think of the company for its deliveries? **PROBE** reliability of deliveries, speed of deliveries.

Prompts

Prompting is not the same as probing. A prompt suggests a possible answer to the respondent whereas a probe remains open ended. Prompts are used in pre-coded questions where the response categories are fixed. They would normally be read out or shown on a card. It is important that the interviewer is clear whether the pre-coded answers are there to be used as prompts or if they are simply there for interviewing and data processing convenience. In the two questions which follow, the first is not prompted and the second one is.

Q What is the reason for your visit to Marple today? **DO NOT PROMPT.**

Work	1
Shopping	2
Visiting friends/relations etc	3
Looking around/passing through	4
To eat/drink	5
Car service	6
Medical/dentist	7
Sport/recreational	8
Other _____	

Q And how do you like the town? **READ SCALE**

Like it a lot	1
Quite like it	2
Not very keen on it	3
Don't like it at all	4

By way of illustration, the above scale shows that there is no formality to their wording and any phrases can be used which the researcher thinks is appropriate for capturing the mood of the answer. Nor is it necessary for all scales to have a mid and neutral point (although they usually do). Sometimes researchers deliberately miss these out so that it forces an opinion towards one or other of the poles.

When questioning the recall of brands or names of companies it is normal to ask the question in open ended fashion first and then to prompt as illustrated in the following example.

Q2a I would like you to think about pharmaceutical wholesalers. Which names come to mind? **DO NOT PROMPT. PROBE:** Any others?

Q2b And now I would like to read out a list of names of pharmaceutical wholesalers. As I read out each name would you tell me if you have heard of the company? **READ LIST. ROTATE START. TICK START**

	Q2a	Q2b
Ayrton Saunders	1 (8)	1 (10)
Butlers	2	2
Daniels (Richard)	3	3
Foster (George)	4	4
Harris (Philip)	5	5
Hills	6	6
Macarthy	7	7
Mawdsleys	8	8
Rowlands	9	9
Sants Pharmac.	10	10
SOT/Barclay	11	11
UniChem	12	12
Vestric	1 (9)	1 (11)
None	2	N/A
Others (specify) _____		

Multi-coding

In the previous example a respondent would almost certainly have been aware of a number of pharmaceutical companies. The question made it clear that as many names as possible were being sought. This is a multi-response question in which the interviewer would circle as many names as are recalled. Sometimes it may not be clear as to whether multi or single responses are acceptable and an instruction should be provided.

Q In order that we can classify the answers you have just given me, would you tell me the principal nature of your company's business? **DO NOT PROMPT. CIRCLE ONLY ONE ANSWER.**

- | | |
|-------------------------|---|
| Civil engineers | 1 |
| Building contractors | 2 |
| Process engineers | 3 |
| Process plant suppliers | 4 |
| Consulting engineers | 5 |
| Quantity surveyors | 6 |
| Architects | 7 |
| Others _____ | |

Q And which of the following territories accounts for most of your overseas work? **PROMPT WITH LIST. ROTATE LIST. TICK START. CAN ACCEPT MORE THAN ONE RESPONSE.**

- | | |
|--------------------------|---|
| Europe other than the UK | 1 |
| North America | 2 |
| South America | 3 |
| Middle East | 4 |
| Far East | 5 |
| Africa | 6 |
| Australasia | 7 |
| Soviet/CIS bloc | 8 |
| Others _____ | |

In examples such as these it will be clear that some clarification or qualification to an answer may be needed. The interviewer needs to know what to do if the respondent says they design process plant. Is the company to be slotted in with 'Consulting engineers', 'Process engineers' or 'Process plant suppliers'. And what should they do if a respondent says they are involved in a major project in Turkey - is this to be classified within Europe or the Middle East? These type of problems arise in interviews and they can be catered for by a thorough briefing of the interviewing team.