

The Expat Researcher

By Lukasz Marczyk, Dubai

Bahrain



Eight years ago, I took off from my native Poland to take up an expatriate post in the Gulf. Have to say, I was fortunate enough to find that my first station was the Incite office located in friendly and peaceful Bahrain. I went through an all-round induction, which covered the structure of the organisation, portfolio of the clients, types of project and their status. I also had the opportunity to spend time at the various departments to get to know my new colleagues.

To a newcomer like me, life in the Gulf is very different compared with that in Europe and it took a while to adapt. First of all, there is the summer heat, which jumps on you when leaving the air-conditioned office, home or car. The day after I arrived in Bahrain, I strolled down to the Seef Mall – about a kilometre away from Manama where I was staying - just to explore my new environment. I could see this sprawling complex from a distance and my resolve strengthened to reach it on foot. After a while, I ran out of footpath and journeyed on, pacing the hard shoulder of the motorway with cars zooming by. Clearly, the notion that someone might actually want to walk from Manama to the Seef area had not occurred to the planners. Anyway, I still remember the faces of amazement in the passing cars staring at me as though I was out of space. I must have struck an odd figure on that hard shoulder with my shirt clinging to my torso glued there by continuous pouring of perspiration. Mind you, perspiration had a hard time keeping up with evaporation. Hot, hot! But in the end, I triumphed and made it to the mall. Suffice to say though that I returned by taxi.

The second of initial impressions is the potpourri of different nationalities living in

the Gulf. At that time, many Asians from nearby India to as far as the Philippines; all bringing with them their own culture, cuisine and humour. It was delightful to learn so much in one place about communities I had read about, but had never personally made acquaintance with. Strange sounding languages would buzz around the office and in my presence; voices would quickly switch to English: out of politeness, I guess. That would not necessarily mean we understood each other perfectly. It took me a while to decipher different accents spoken at neck breaking speed. I even learnt new variations of English words I had not come across before. For example, “Prepone”; as in bringing (something) forward to an earlier date or time.

My stint in Bahrain was delightful and it was a rather sad occasion to say goodbye to my Bahraini and Asian colleagues to take up my post at Incite’s office in Dubai.

United Arab Emirates



Whoever thinks that all the Gulf States are similar has probably never visited the region. As you would expect in any country, Bahrainis dominate the population on the island, but in the United Arab Emirates, nationals account for just - give or take - 20%. The expatriate community outnumbers the locals many times over and this contributes to the country having a very different character. Add to this the greater wealth of the UAE compared with Bahrain and you find a place that is buzzing with business excitement.

At that time construction in Dubai was booming with developments sprouting up

one after the other with increasing heights, culminating of course in that famous landmark of Dubai: the Burj al Khalifa, like an icicle piercing the clouds. The UAE’s booming economy buoyed Incite’s research business and where in Bahrain I could stroll, in Dubai I had to keep running to keep pace with the stream of projects.

Challenges

In the same way that the lifestyle in the Gulf is so much different from that in Europe, you can say that the research business is very different too. Certain practices you take for granted at home, are turned upside down. Take, for example, random sampling that is the fundamental principle upon which many statistical analyses rely. When the population is as heterogeneous as it is in the Gulf with cultural sensitivities to do with contacting females for interviews, random sampling is virtually impossible. Its concept assumes each contact has the same chance of being converted to an interview and that is basically not achievable in the Gulf.

What it means in practice is that male interviewers should not contact Muslim females with a traditional mind set. Refusal rates are higher when Asians attempt interviews with Arabs and respondents in higher income groups are difficult to reach. When interviewers do manage to get through to them, these respondents are more likely to decline participation.

An attempted random sample in the Gulf, therefore unchecked by quotas, inevitably leads to a disproportionate set of respondents and the results of such a survey are not representative of the targeted population, which in turn leads to misleading results.

The norm in the Gulf is therefore to work with a sample frame and quotas, based on an estimated universe developed from secondary research. Interviewers engage respondents through the so-called snowballing technique, which is essentially a method that draws on referrals and fresh contacts.

Interviewers are more successful when they approach respondents of the same gender and ethnicity, as they can strike a better rapport. For this reason, field managers need to operate much larger interviewer teams compared with Europe.

Saudi Arabia



Saudi Arabia has a closed society for women, who have limited opportunities to venture out on their own and often need a chaperone of sorts like a member of the family.

For quantitative research, the snowballing technique manages to secure completes with Saudi females, but recruiters would not be very successful trying to persuade ladies to attend a focus group in an office or hotel. The idea that "Strangers" – observers – could gaze at them on the other side of a mirror or camera runs against the grain of the local culture.

In the kingdom, most research agencies therefore conduct focus groups in the home of a supervisor or one of the respondents may volunteer for a session to be convened at her house. Recording must be audio only, and trying to arrange a foreigner to attend such a group in person is difficult to say the least.

Mixed ethnicity groups of the same gender are problematic because of potential language and cultural barriers. Mixed gender groups are unthinkable in Saudi Arabia, but while quite difficult in other Gulf countries, possible.

The Consulting – Field Gap

Qualitative

In Europe, moderators usually analyse the results of focus groups and in-depth interviews themselves and prepare the report. This is not common in the Gulf, where moderators conduct the groups, but they are generally not responsible for the content analysis and reporting. The reason for this is, once again, the need to match – as much as possible – the ethnicity and gender of the researcher with that of respondents and this means there is a need to draw from a much larger pool of moderators.

Agencies may count full time moderators under their permanent staff. However, they are not necessarily part of the consulting team and belong to the field department instead. Even then, the requirement to use a moderator to suit a particular group of respondents in terms of age, gender and ethnicity often exceeds the number of full time moderators agencies employ. For this reason, moderators are frequently freelancers.

While the consultant responsible for the reporting of a focus group may observe the discussion and can pass notes to the moderator, there remains a gap. Sometimes issues get lost in translation and on other occasions the discussion has already moved on, not giving the consultant enough time to intervene.

Much also depends on the understanding the moderator has of the objectives of the research and the intricacies of selected enabling techniques. Even with a thorough briefing, the perspective of a moderator with field roots can still be quite different from that of the consultant and this could affect the quality of the research.

Quantitative

As mentioned earlier, field teams in the Gulf must be sizeable in order to address the challenges of interviewing a multi-ethnic population. Few agencies in the region – if any at all – employ full time interviewers and most freelancers conduct interviews after or before the working hours of their regular job or they are housewives, students, unemployed etc.

The size of the payment to an interviewer depends on the number of submitted completes. The risk of this method is of course that interviewers value a completed questionnaire by the amount they receive for it rather than the quality of information it contains, which is of greater concern to the consultant who is to compile the report. This too is a perilous gap with contradicting interests. Interviewers will want to hand in their completed questionnaires quick as a bunny with a potential temptation to gloss over instructions and keep responses to open ended questions to an absolute minimum, which is exactly the opposite of what the consultant wants.

Occasionally the quick as a bunny can turn into quick and dirty; or worse. Most interviewers are expatriates and therefore by default their stay in the country is

temporary with the objective of earning as much money they can in as short a time as possible. This, set against the backdrop of a rather materialistic environment, could possibly bring about a kind of mentality among some of them that is rather alien to me.

I have come across some gobsmacking antics of interviewers, even supervisors; and all I can say is that in my opinion they arise from a lack of empathy some interviewers have with the purpose of a survey and unrealistic expectations of "Ivory Tower" project managers.

Perseverance and Adaptability

Living in Dubai and travelling across the Arabian Peninsula/North Africa for projects is great fun and I have a whale of a time. But of course every place and every job has its ups and downs and you take the rough with the smooth.

In my experience, perseverance and adaptability go a long way towards finding solutions. I learnt to accept certain things for what they are, and then to change the approach to get around the problem rather than trying to knock it down with a sledgehammer.



For instance, take this issue with the interviewers. I remember a big shouting match in the office of the field manager who was venting his rage on a few poor interviewers who had handed in some equally poor questionnaires. The unfortunate souls left his office slighted never to be seen again. After giving some time for the field manager to regain this composure, I popped through his door to invite him for a coffee in one of the cafes nearby. I was curious to know why this otherwise so gentle person, whose conduct was generally impeccable, could blow his top this way.

The Field manager described the frolics of the interviewers and his tales were deplorable. I took out a piece of paper and started jotting down the many thorns that his interviewers had jabbed him in his side. It became clear to me that rebukes and ramming unyielding instructions down throats did not cut much ice and I started pondering on a different tactic. We decided to meet again the following week.

Team Spirit



At the same coffee shop seven days later, we drafted a list of actions points and agreed to meet weekly to help each other usher through some changes. I wrote down as a heading for the list: "Steps to Develop Transparency and Team Spirit".

Developing some kind of camaraderie is tough enough with full time staff. To attempt this with freelancers is not an easy feat. On the one hand, as human beings, do we like the comfort of the idea of belonging to a group or community; on the other hand we yearn to express our own personality to stand out of the crowd. Striking the balance between these two longings is as difficult as that between encouragement with compliments and reprimands. Yet, both are necessary when an occasion calls for them.

Team spirit has a better chance of blossoming when we can put ourselves in the shoes of the people we work with. I suppose you could use the word empathy. Those consultants, who author questionnaires, with interviewing experience are likely to do a better job than those who have never quizzed a respondent. We should not underestimate the taxing task of an interviewer who needs to have a variety of talents, such as interpersonal skills, persuasive powers, being articulate and even entertaining.

Steps to Develop Transparency and Team Spirit

The Questionnaire

Ensure consultants draft questionnaires that meet the following criteria.

- Leave no room for ambiguity.
- Use a standard format that is clear and uncluttered.
- Addresses essentials only and leave out "Nice to know" questions.
- Keep questionnaires as short as possible.
- Pay minute attention to the presentation of the questionnaires to let interviewers know that great care was invested in them, in a bid for the interviewers to reciprocate.
- Avoid longwinded questions and wordy statements. The questions should be short and instructions concise.
- Ensure there is sufficient space to write down answers to open ended questions.
- Avoid excessive use of words in bold or italic characters, of underlining and capitalisation. Use the same standard font type and size. In short, avoid cluttering.
- Ensure routing instructions are easy to follow; questions to be in a logical order.
- If possible, use show cards for questions, attributes or statements that are time consuming to read out and that could be tedious to respondents.
- Avoid using or experimenting with techniques that have a risk of going wrong with the chosen method of data collection (for instance conjoint questions through PAPI). If there is no choice, pilot the questionnaire first before launching fieldwork.

Inductions

Newly recruited interviewers receive a 3-hour induction in group format that covers the following topics.

- The purpose of market research.
- The role of interviewers.
- Code of conduct relevant to fieldwork.
- Recruitment and interviewing techniques.
- Incite's format for questionnaires and interview instructions.
- How to deal with open-ended question.
- The purpose of pilot interviews and how administering them differs from standard completion.
- Quotas and the reasons for implementing them.
- Dress code and professional conduct.
- Payment terms and the interviewer performance scheme.
- Administrative procedures (submitting questionnaires, expenses, claiming interview fees etc.).

Interviewers receive a starter kit, which includes an interview manual, clipboard, ID badge with card and letter of authorisation.

Classification of Interviewers

Supervisors are responsible for maintaining their own team: ensuring there are sufficient interviewers of the required calibre. One of tasks is therefore to recruit new interviewers if the size of the team drops below the minimum level of 12.

When new interviewers join the team, they complete an evaluation form that the field manager uses together with the comments from the supervisor to grade the new member. The basis for the grading is primarily the reach the interviewer has in accessing particular respondent segments combined with relevant industry experience. For instance, grade M consists of interviewers who can access respondents in healthcare (e.g. doctors, nurses, technicians) and who have working knowledge in the industry. Similarly there are grades for automotive, FMCG, construction etc. In addition to the grade, the new interviewer also receives a rating, ranging from 1 (novice interviewer) to 5 (veteran). An interviewer with reach in healthcare and with modest experience could therefore receive the classification of M3.

This classification determines the payment level the interviewer receives compared with the base rate, which the project manager determines from project to project. It means that an experienced interviewer with a good reach into, for example, high net worth nationals receives a much higher fee than a relatively inexperienced interviewer working with mostly FMCG projects. The system serves transparency and the field manager explains this to every new recruit.

Steps to Develop Transparency and Team Spirit

Project Launch Briefings

The project manager or field manager handles this 2-3 hour briefing, aided by documented interview instructions. All interviewers assigned to the survey attend the session, which covers the following topics.

- Objectives of the research.
- The target respondents.
- The methodology.
- The sample plan.
- Fieldwork timings and frequency of turning in completes.
- The quality control measures.
- The base remuneration.
- The questionnaire in great detail.

The project manager or field manager first explains the questionnaire question by question. Following this, each interviewer (one at a time) asks one question to the person sitting next to him/her, who answers the question in the guise of a respondent and then asks the next question to the person next to him/her following a round-robin principle. This continues until all questions have been covered.

The group of interviewers then divides into pairs to continue the mock-up interviewing, with each interviewing the other for the full questionnaire. The project/field manager monitors the pairs and intercepts with additional instructions when needed.

The interviewers then receive all field material, such as written interview instructions, individual quotas, forms for completion (if PAPI), required equipment (e.g. tablet PC for CAPI) and a letter of introduction specifically for the survey in hand.

A supervisor accompanies new interviewers, fresh from the induction, for the first few interviews until the supervisor is satisfied with the standard of interviewing.

In-Progress Briefings

As fieldwork is in progress, supervisors may need to replace interviewers or strengthen the team when completes are not coming in fast enough. In such cases, the supervisor briefs the interviewers one-on-one in the same fashion as with the project launch briefing.

Interviewer Performance Scheme

The performance scheme essentially relies on a balanced scorecard, drawing from weighted inputs from the following:

- Interviewing skill.
- Productivity.
- Compliance with interviewing standards.
- Accuracy.
- Reliability.
- Flexibility.
- Availability.
- Applying due diligence.
- Interpersonal skills.
- Professional conduct.
- Quality control scrutiny.
- Team spirit.
- Enthusiasm/drive.

Sources for the inputs are the supervisor, field manager, respondents (through back-checking calls) and quality controllers. The scoring occurs after every 200 completes the interviewer has submitted and the weighted index determines his or her classification, which is shared with the interviewer in question. Therefore, with progress in performance the rated grade of the interviewer improves and with it his or her payment for new surveys.

Therefore, when composing a questionnaire, the consultant must not only consider the needs of the client, but also those of the interviewers. A well-crafted questionnaire can lift the quality of data collection considerably and extends to interviewers the gesture that they deserve that attention to detail to make their job easier.

The result of throwing interviewers in at the deep end is the inevitable sinking. First of all, superficial training and hasty briefings send out the wrong – a disrespectful – message to the interviewers; as in "Is this all I am worth?" Secondly and predictably, a survey conducted by poorly briefed interviewers is bound to go astray. Interviewers need to know the fundamentals of market research through an induction when they join the team and should receive thorough personal briefings before the launch of a survey.

Strict but Fair

If interviewers do not receive fair pay for their work, there will be a greater inclination to start cutting corners and this affects the quality of the raw data.

The interviewer classification and performance system we developed serves transparency in ensuring interviewers feel they receive a fair deal with their pay in the first place and that they know how - through a balanced scorecard - they can increase their earnings. Another important aspect in building a good relationship with interviewers is that the time of receiving their payment for the work they have done should be as per the promise (maximum within 4 weeks of closing fieldwork) and should not be dependent on whether the client for the survey has paid or not.

Interviewers must know the due diligence measures the QA staff perform as well as both the penalties for breaching and rewards for abiding by the code of conduct.

Quality Control

Quality control measures depend on the method of data collection but in principles includes.

- Full scrutiny of PAPI questionnaires before data entry: ensuring the form is complete with consistent responses.
- For surveys where interviewers record the contact details of respondents, there is a minimum of 30% back-checking per interviewer through recorded (with the permission of the respondent) call backs by the supervisor.

Quality controllers – completely independent from the field department – listen to all the recorded call-backs (the supervisor made) in full or in part depending on the evident quality.



- Quality controllers arrange further call-backs to 10% of respondents over and above those made by the supervisor and another 10% to the respondents already called back by the supervisor. The latter to ensure the supervisor has resisted the temptation to “Protect” his own team of interviewers.
- For surveys that do not collect contact details of respondents – for example intercept interviews and respondents from panels – there is continuous onsite supervision with spot-checks of completed questionnaires in the case of offline work. For online surveys, we verify that the IP address of the respondent matches the city of residence where he or she claims to live (through a question in the questionnaire). Quality control also inspect the duration of completion.
- In all cases, the data analyst assigned for the survey checks the data files both manually and through a validation program.

The Results

At the end of the day, there is no magic formula for developing team spirit because we are after all dealing with people and we are not all alike. If truth be told, the results of the scheme were encouraging, but not as staggering as we had hoped. The net effect was that we increased the retention rate of good interviewers, but we had to weed out those who neither took interviewing seriously nor the scheme. For me personally I felt to have scored one big victory though: there were no more shouting matches in the field manager’s office.
