

# A Newcomers' Guide to Market and Social Research

*This is a guide, aimed at newcomers to research, which gives an outline of different research methods, the information they can obtain, and how they will be able to help you.*

What follows is, of course, a simplification. There are dozens of books available which give detailed descriptions of the technicalities and subtleties of research methodology. These few pages are different. They provide basic non-technical information which will help a research newcomer to think about

- (i) what you need to know and
- (ii) how you might go about getting it.

Research, superficially, seems straightforward – you ask a few people a few questions, and get the information you need. But it isn't that simple and it is always advisable in research, as in every sphere of life, to consult the professionals. It wouldn't be wise to take legal or medical advice from a non-specialist and the same is true for research.

And that is what this book is for, to help you get the research you need. We deal with the process of buying research in the second half of this article. First, however, we look at what research is. The questions we identify below are the sorts of questions that a research buyer – the client – should think about in advance so that they can brief research agencies about what they need. The agencies will then bring their professional expertise to the situation and give their advice.

## A. What is research?

### 1. The basic question

Though there are many different sorts of research, it can be simmered down into two basic types by the sort of information it obtains. So if, as a buyer of research, you need numbers – if you need to be able to say that '23% of people said Yes' to something, or 'a quarter of the population say they want' something else – you need **quantitative research**.

On the other hand, if you don't need numbers but need a particular sort of understanding – if you want to know not only what people do but why they do it, not what they want but why they want it – you need **qualitative research**.

We deal with quantitative research in Section 2 and qualitative research in Section 3 below.

## 2. Quantitative research

The popular image of market research is of a woman standing in the street with a clipboard, interviewing occasional passers-by. Though on-street interviewing is done, it is not the most common form of data collection, but this image does sum up one of the key things about research – we collect information by talking to a relatively small number of people, which gives us an indication of the views of a larger number. But...

... it only works if you talk to the right number of people,  
... it only works if you talk to the right type of people and  
... it only works if you ask the right questions and analyse the data you get in the right way.

To illustrate this, if a car manufacturer wants to know how the public are likely to feel about a new car design, it wouldn't be enough to talk only to men. Women, and sometimes children, take part in the car selection process, so they might be consulted too. Owners of current models of the manufacturer's products should be interviewed but so, probably, should those with other types of cars, who are potential rather than current purchasers.

Equally, if quantitative data (numbers) are needed, it wouldn't be enough to talk only to a couple of dozen people. You would need more, and you would need people of various ages, and probably from different parts of the country, to get a cross-section of the relevant population. And, of course, you would need to make sure that everybody fully understands and can answer the questions you ask, otherwise the information you get from the research will be misleading or worthless.

This is an extreme example and most users of research are not large car manufacturers. But these sorts of questions – Who do we need to talk to? What do we need to ask them? – are common to all research, large or small.

How do you get the information you need? Again to simplify, there are two main methods – by talking to people, either in person or on the phone, or by using the post and getting people to fill in questionnaires and send them back to you.

Either way, all the people who take part in a given quantitative survey are asked the same questions in the same order, so that the information can be added together at the end to give an overall picture. **Surveys using the internet** are also possible, but the technique is in its infancy and is only possible where everybody you need to contact already uses the internet. Some firms are starting to specialise in this approach however, and they can be identified from the index. In the early days of research, people tended to be contacted using what were known as **random** sampling techniques. In this context 'random' had a very specific meaning. The names of potential respondents (respondents are the

people we interview and get information from) were selected at random, for example by taking every tenth or twentieth name from a list of everybody relevant. So if it was a survey of the general public, the names would be taken from the Electoral Register, and as many of those people as possible would then be interviewed. However, this was a relatively expensive approach to research, so these days the majority of surveys are done using **quota** methods.

Quota sampling involves interviewing certain **types** of people. So if the people whose views you need are, for example, all under 50 years old, both men and women, and all have children under 11, then the interviewers will be asked to find and interview people of the same type. And when they have finished interviewing you will have a sample – a set of respondents – all of whom are under 50, half of whom are women, and all of whom have children under 11. It will be a small simmering-down, a cross-section, of all the people you're interested in.

The question of how many people you need to interview is outside the scope of this brief article (it depends to a great extent on the complexity of the analysis that is needed), and will be for discussion between the research buyer and the research agency.

### 3. Other forms of quantitative research

There are two specific forms of data collection that should be mentioned here because they are ways of gathering data relatively cheaply. They are not always appropriate – it depends on the project – but are worth considering.

**Hall tests** are a way of getting the views of a cross-section of people when there is something that the people need to see – perhaps a new sort of packaging, or the plans for a new traffic flow or parking system. Respondents are recruited in the street and invited into the hall, often a church hall or a hotel room, to see the exhibit and be asked questions about it.

Secondly, there are **omnibus surveys**, where the costs of contacting the respondents are shared by several clients who all have questions included in a single survey.

Though the majority of research is either qual or quant, there are other approaches that shouldn't be forgotten. Useful information can sometimes be obtained simply from watching what people do – **by observation**.

- ◆ Do they find it easy to move round the shop or showroom and, if not, where are the problems?
- ◆ Are there any parts of the display – of cars, books, food, or whatever – that people seem to miss?
- ◆ Do they have difficulty finding what they're looking for? And so on.

Also, your sales data or feedback from customers may be worth another look. Do you already have information that you haven't thought of as research data but which might provide you with useful thoughts and ideas?

#### 4. Qualitative research

As we mentioned, qualitative research – qual for short – is a means of finding out not simply what people do, but why they do it. So, for example, what is it that people like – or dislike – about a product, or advert? Why do they feel that way? And what would they prefer?

Because you talk to fewer people in qualitative research work than you do in quantitative, and because in qual you're having exploratory discussions rather than everybody being asked the same questions, qual cannot provide numbers. What it can do however is provide greater understanding of what people need, want, feel and care about, which can be valuable information in its own right.

Qual research can be used on its own, where numbers are not required. Equally, it can be used in advance of a quantitative study, to help the researchers decide what questions to ask and how to ask them. Thirdly, it can be used alongside or after quantitative research, to help explain the data, or perhaps to 'put flesh and blood' on the bones of the figures and numbers from the quant survey.

Research of this sort is almost invariably done face-to-face. One of the best-known techniques is **focus groups** (also known as **group discussions**) where eight or nine relevant people are brought together for an hour, or perhaps an hour and a half, to discuss something – the new product, the ad campaign, the local authority's services for the elderly, or whatever. The respondents' different views and experiences combine to create a unique and useful conversation.

A professional researcher, known as the moderator, guides the group through a series of topics previously agreed between the client and the agency, but in a less structured way than with a quantitative questionnaire – the discussion is more free-flowing. And things may emerge from these discussions, things that are important but that the researchers had not thought of before, which can then be followed-up and explored.

In other words, qual will sometimes discover things that the research team had not previously considered.

Not all qual research is done with groups, however. Individual interviews – often known as **depth interviews** – are sometimes more appropriate.

Elsewhere on the RBG CD-ROM and RBG website is a short glossary of some of the more common research terms – you may find this useful too.

## 5. Is it legal and is it ethical?

As you know, research depends on the co-operation of the public. The industry, both clients and agencies, relies on people giving up their time to be interviewed and thus providing information about what they do, and what they would like. Not surprisingly, there are rules about what the research industry can, and cannot, do in collecting this sort of data.

There is legislation that sets some limits, and the Market Research Society, like all professional bodies, has a **Code of Conduct** for its members. At this stage all you need to know is that the foundation stone of these rules is that nobody who provides information should be misled about what they are involved in. (So, to give one example of the rules, if it's a confidential survey research project, there must not be any follow-up sales calls to those who have been interviewed – it's research only.)

As you get more involved in research you should familiarise yourself with the Code. However, the onus is on the research agencies listed in this book to ensure that nothing is done which conflicts with the MRS Code of Conduct. The full Code is included on the RBG CD-ROM (see *Codes of Conduct*) and on the MRS website.

So, once you've reached this point, what happens next?

## B. Choosing a Research Agency

### 1. Preparation

You already know the subject matter of your research, which could be anything from advertising to fashion to finance to politics to transport. You might be interested in the views of the public as a whole, or some smaller group – parents, or car drivers, or children, or computer managers, or teachers. Equally, you now know what sort of information you need and have some initial ideas on how it might be collected. Before you can contact any research agencies, however, you also need to consider what specific services you are looking for.

Are you looking for advice only – that is, for research consultancy? Or do you already have your data and now need to have it analysed? Or, if it's a full research project will you expect a detailed report at the end of the work or will you only be needing computer tables of the findings, of which you can do your own assessment? Since report writing costs money, you may prefer – in theory – to do the work yourself. On the other hand, will you have the time, and do you have the expertise to 'read' a survey print-out and get the full story from it?

When you have reached this stage you will be able to prepare a draft research brief. This is the document which you will give to the research agencies and which will define the task for them. The more key information you can tell them, the more likely they are to give you a useful, constructive and appropriate response. So the draft should contain:

- ◆ a summary of the background to the research
- ◆ an outline of the opportunities or problems that need to be explored and, in particular, details of what you want to do with the information you get
- ◆ a description of the people whose views are of interest – the potential respondents
- ◆ an outline of the questions that seem, at this early stage, to need answering
- ◆ suggestions on how the data might be collected
- ◆ a description of what you are expecting to get: what are the 'deliverables' – advice only, data, a full report...?
- ◆ the timing – when, being realistic, will the work be able to start, and when is the information needed by?
- ◆ an outline of any contractual requirements that you would anticipate
- ◆ the budget – how much money is likely to be available for the work
- ◆ when do you need the agencies' proposals? (But remember to give them a reasonable amount of thinking and writing time.)

And don't forget to ask for an outline of the company's – and its relevant staff's – experience.

Naturally, the agencies will have their own views on many of these questions. They will respond – rightly – in discussions with you and in the proposal document which they will prepare to answer your brief.

The question of cost is not covered in detail in this brief introduction to research. There are so many variables involved (How many questions need answering? How difficult will it be to contact the respondents? How many interviews will be required? How complex is the analysis? Is a presentation of the data required? Etc etc) that any attempt at guidance runs the risk of being misleading. It is worth noting, however, that unless the agencies are given a realistic guide to the likely size of the project and/or the financial provision that has been made, they will be unable to produce realistic and therefore useful proposals.

## **2. How many agencies?**

As a newcomer to research, you may want to invite several agencies to put in competitive bids for your work. It is not reasonable to ask more than three or four agencies to bid.

Proposal-writing is a time-consuming and therefore costly exercise and it is unfair to ask firms to do this work if they have less than about a one in four chance of

getting the job. Besides which, proposal costs have to be recouped within the agencies' income, so excessive requests for proposals will eventually increase the overall cost of research.

### 3. Which agencies?

As you will see from a quick glance through this book, there are many different types of agency. For example,

- ◆ **Full-service agencies** will be able to provide professional staff to design your project (ie to decide what needs doing) but will also be able to provide professional staff to collect, analyse and evaluate the data.
- ◆ **Consultants** offer a range of services, many being qualitative specialists. Some offer both qualitative and quantitative research and will subcontract those elements of the work they cannot do themselves (such as quantitative interviewing, or large-scale data analysis).
- ◆ **Fieldwork and tabulation** agencies deal with data-collection and data analysis. They may have a team of face-to-face interviewers and/or a telephone interviewing centre. 'Fieldwork' means the interviewing process. 'Tabulation' means producing tables (computer print-out) of the data generated by the survey.
- ◆ **Data preparation and analysis** agencies do not do fieldwork but undertake various types of computer analysis.

Some qualitative research is undertaken in **viewing facilities** where the discussions (with the respondents' permission) can be both tape-recorded and videoed and, if necessary, watched by other researchers and the client.

Which agencies should you go to? There are various sources of information. By using the colour-coded pages at the back of this book, you can identify a list of agencies that seem to offer the right combination of skills and expertise for your project. If you don't know anything about them, ask them to send you a brochure or brief details about their company.

The British Market Research Association (BMRA), which is the trade association for the research agencies, offers Selectline on Freephone 0800 801785 – this is a free service to help buyers match their needs to companies with the relevant expertise.

And, of course, if you know other people who have used research, whether they are personal or business contacts, talk to them. Word of mouth can always be helpful.

It is also worth noting that although many of the larger agencies have head offices in London, there are a number of agencies based in other areas around the country. You might want to use a local company if it offers the relevant skills and expertise.

#### **4. How do you decide which agency to use?**

If you have three or four proposals to choose from, how do you decide? Again to simplify, there are a number of questions to bear in mind.

- ◆ Which company seems to have understood what you need?
- ◆ Which company has perhaps added to your thinking by coming up with ideas of their own?
- ◆ Does the proposed research design seem to match your expectations and, if not, are convincing alternatives presented and explained?
- ◆ Does the company have relevant experience, either in terms of methodology and/or the subject of your project?
- ◆ Assuming that they have understood your needs, do they seem to be offering value for money?
- ◆ Which company's work 'feels right'? From your contacts with the agency and from the documents it has produced for you, do you think you trust the organisation and can work with its staff?

And once you have decided which agency to use, it is courteous to inform the unsuccessful agencies as soon as possible that they have not been successful, and to tell them why. Constructive criticism will help them provide a better service next time.

Good luck with your research!

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