Face-to-face 2.0

Content themes:
- Brain game
- Finding faster growth
- Connected world
- Research excellence
Digital technology has highlighted what’s wrong with face-to-face surveys. Now it’s time for it to rejuvenate them.

TNS has more conversations with the world’s consumers than anyone, more than 52 million of them in the average year. The nature of these conversations has changed dramatically in recent times, and no shift is more significant than the move of so many of them online. During the past year, 24 million of our conversations took place through the internet. This was over 10 million more than took the form of traditional face-to-face interviews.

**How face-to-face fell behind**

In many ways, face-to-face interviewing seems to have been left-behind by the evolution of research. After all, interviews served via the internet on PC or mobile have several inherent advantages that remind us why face-to-face interviewing isn’t always an ideal solution. Online research data can be collated and analysed more quickly. Because there are less human intermediaries, it provides less room for error. And thanks to mobile technology and integration with listening software, online surveys can increasingly be served to consumers at the most relevant point, close to the moment when the experiences they are concerned with actually took place. TNS demonstrated the huge potential of listening-triggered mobile surveys in a groundbreaking recent study showing the real impact of mobile phones on shopping.

This situation leaves research companies with a choice. They can focus their efforts on a future where the vast majority of research takes place online, and regard face-to-face simply as a stop-gap measure. Alternatively, they can invest in applying the advantages of digital technology to revitalising face-to-face surveys, building on the unique advantages that it brings – and with an eye on the many situations to which it is uniquely suited. This is the approach that TNS has taken.
Bringing fieldwork into the digital age
We have set ourselves the goal of making our face-to-face surveys 100% digital by the end of 2014 and we are on course to achieve that target. This transformation has been made possible by the development of low-cost tablet technology over the last few years, which we are now rolling out across all TNS field research. It has involved removing more than 30 million pages of paper questionnaires from our systems, deploying more than 15,000 tablets and training more than 20,000 interviewers in how to use them. And it is already transforming the scope of the face-to-face interview.

We made this decision because we listen to our clients, analyse their needs, and therefore know that face-to-face surveys have a huge role to play in the medium and long-term future of research. Given their on-going importance, it is inherently wrong to allow them to lag behind online research when it comes to quality, responsiveness and innovation. The fact is that many of the world's most important, rapidly growing markets have low internet penetration that dooms solely online research to being unrepresentative. It's true that mobile offers a unique opportunity in many of these markets, but the practical constraints of survey length mean that face-to-face still has an important role to play. Even in developed markets where internet penetration is higher, more complex surveys require a feet-on-the-ground approach to ensure top quality sampling, especially where precise measurement is needed (internet surveys fall down here as you can’t measure internet usage online). When it comes to political and social work, it’s vital that all types of people must have an equal opportunity to participate.

Coupled with the additional reach and rigour that they make possible is the fact that face-to-face surveys should offer the opportunity to explore individual motivation and context at a deeper level. We know that they support a higher attention span. Whereas a mobile survey must be capped at 8 minutes to ensure a good response rate, the average length of a face-to-face survey is over 35 minutes. The problem is that this extra time hasn’t always been used in a way that keeps the respondent engaged whilst delivering better quality data. Digital technology is changing that.

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**Smarter surveys, better respondent experiences**

Online research has already proven the value of gamification in helping to improve survey response. Migrating face-to-face surveys onto tablets is extending the same benefits to the field. Handing over a tablet for a respondent to scroll through a survey and complete it themselves, produces a better experience. The multimedia capabilities of the tablet make this experience richer, helping to break down literacy barriers. Showing a pack design or poster; playing the video of an ad, or using video to recreate familiar contexts: all reduce the dependence on memory and description to induce meaningful responses.

At the same time, a tablet-driven interview experience enables us to apply the same shorter, smarter survey techniques that TNS's ConversionModel\(^1\) pioneered in the online space. We can re-route interviews on the fly, serving only relevant questions based on a respondent’s previous answers, and improving data quality whilst maintaining higher engagement levels. And as the face-to-face interview experience more closely resembles its online equivalent, we have more scope to integrate data from the two different sources. The multi-mode approach that this compatibility enables can be a game-changer in China, for example, where Tier 1 cities are best suited to an online approach – but rural areas require interviewers on the ground.

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\(^1\)ConversionModel uses TNS’ understanding of individual consumers to provide detailed insights into category dynamics and spending patterns, pinpointing opportunities to attract new consumers, re-win existing ones and to optimise their spending. It uses a precise understanding of today’s market to predict tomorrow.
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Transforming speed and quality
The move to digital data collection isn’t just transforming the scope of face-to-face interviewing; it’s taking care of the fundamentals as well. As we roll the approach out globally, we are seeing significant advances in both speed and data quality – areas that should always be a focus of continuous improvement when researching in rapid-growth markets.

Entering data from over 30 million hard-copy pages inevitably takes time. Add to that the fact that in rural Africa, India or China, those pages may first need to make a physical journey of hundreds of miles, with the risk of getting lost or disordered on the way. Our tablet technology removes these issues at a stroke. Data can now be instantly synchronised over a wi-fi or cell phone network, transforming the contribution that face-to-face interviewing can make to rapid-response, actionable insight. One of our multi-country clients, conducting research simultaneously across more than 30 markets, is now able to have data synchronised and reports available within 24 hours of fieldwork ending.

By removing the need for manual data entry, tablets eliminate one of the most significant potential sources of error in any data collation process. By providing the opportunity to hard-code logic checks into the interview script, they are able to prevent slip-ups by the interviewer themselves. And closing the window on potential mistakes isn’t the only way in which bringing fieldwork into the digital age can preserve data quality. Fraud can be a natural concern when co-ordinating large-scale surveys in remote locations. By recording questions and answers using the tablet, we can check that surveys are conducted fully and properly – and by incorporating GPS technology, we can monitor to ensure they are taking place when and where they should be.

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Digitally powered oversight is a valuable tool when it comes to overseeing survey standards – but it is only part of the solution, and only part of the contribution that digital data collection can make. This needs to be done in conjunction with strong management practices, and we are ensuring that all our fieldwork is managed to the ISO20252 Industry standard. Strong practices around interviewer recruitment, training and management are also essential, as is embedding a sense of greater professionalism.

By improving the experience for interviewers, who find themselves treated with greater respect when carrying a tablet than when carrying a clipboard, bringing face-to-face interviewing into the digital space is making a difference here too.

**Giving face-to-face a share of the future**

Embedding digital data collection across TNS has been a major investment – but it’s one that is already wholly justified by the results that our new approach is delivering. Our goal has never been to fix face-to-face interviewing temporarily, or to keep it functioning until something better comes along. We believe that, incorporated within the digital arena, face-to-face has a huge contribution to make in providing clients with a deeper and more representative picture across all markets. We’re proud to be leading the way in making that happen.

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**By the numbers: how TNS is rejuvenating face-to-face surveys:**

- **14 million:** The approximate number of face-to-face interviews conducted by TNS in the last year
- **30 million:** The number of paper questionnaire pages removed from our systems
- **15,000:** The number of tablets deployed across our markets to enable digital data collection
- **20,000:** The number of researchers being trained in new digital survey techniques
- **24:** The number of hours it takes for data from a 30-market survey to be synchronised and made available through reports, thanks to digital data collection
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About Intelligence Applied
Intelligence Applied is the home of the latest thinking from TNS, where we discuss the issues impacting our clients, explore what makes people tick and spotlight how these insights can create opportunities for business growth.

Please visit www.tnsglobal.com/intelligence-applied for more information.

About TNS
TNS advises clients on specific growth strategies around new market entry, innovation, brand switching and customer and employee relationships, based on long-established expertise and market-leading solutions. With a presence in over 80 countries, TNS has more conversations with the world’s consumers than anyone else and understands individual human behaviours and attitudes across every cultural, economic and political region of the world.

TNS is part of Kantar, the data investment management division of WPP and one of the world’s largest insight, information and consultancy groups.

Please visit www.tnsglobal.com for more information.

Get in touch
If you would like to talk to us about anything you have read in this report, please get in touch via enquiries@tnsglobal.com or via Twitter @tns_global

About the author
James Brooks is Operations Director for TNS Global, and has led the worldwide roll-out of our new digitally driven approach to face-to-face surveys. For more information about the difference that our 100% digital data collection can make, contact James at James.Brooks@tnsglobal.com

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