Telephone Time

In-depth interviews via phone gain greater acceptance.

By Judith Langer

Although the telephone has been used for years for executive depth interview studies, until very recently, there was a great deal of resistance to conducting qualitative interviews with consumers this way. It has always been acceptable to interview professionals by phone; often it’s the only way to reach them (many won’t come to focus groups), and executives are used to communicating by the phone in business anyway.

Consumers, however, might be uncomfortable, even intimidated, by such an impersonal medium, opponents argued. Never mind that quantitative studies have routinely been conducted by phone; it’s easy for people to answer structured questions on the phone, but this doesn’t mean they will “open up” for a depth interview.

But resistance to telephone qualitative research is starting to break down. In the last year alone, my firm conducted a number of telephone interview studies, ranging in length from 20 minutes to an hour and using sample sizes from 25 to 200 respondents. Virtually all of the questions were open-ended with interviewers probing responses. Some studies included closed ends, as well (such as ratings of variables). This combination of qualitative and quantitative research gives clients numbers (how many) along with insights (the whys).

DEPTH INTERVIEWS

Why is there greater acceptance of telephone depth interviews now than in the past? Here are some theories.

• In this fast-moving, high-tech world, talking over the phone has become a fairly standard way of communicating for most people; it almost seems traditional by comparison to live closed-circuit transmission of focus groups and new-fangled on-line focus groups.

• In this era of tight budgets, clients are more receptive to ways of saving money. Phone depth interviews are less expensive than focus groups—no air travel for clients or moderators, no facility room fees, and lower respon- dent fees (because they don’t have to travel).

• The phone also saves time for pressured clients and pressured respondents. It makes it possible to interview customers in a wide range of markets, including those we would not normally reach through focus groups. In a study for a magazine with a rural readership, we spoke to
people living on remote islands and mountains; one interview, with an Oklahoma farmer, had the sound of his chickens clucking in the background.

Not only are respondents able to talk by phone, they are often eager to do so. Giving people an opportunity to talk about themselves and their feelings in their own words is often welcome (and far more interesting than rating long lists of variables). A number of interviews have gone well beyond the originally scheduled times because respondents had so much to say. (It is important to respect respondents’ time and stay within the set time unless they choose to exceed it.)

In an employee turnover study, the client was highly concerned that former workers would be uncomfortable and unwilling to open up. Instead, almost everyone on the list agreed to be interviewed and was very forthcoming. “I’ve been waiting for you guys,” one man said. In a sensitive study of cable channel cancelers, even people who had objected to programming on moral grounds were willing to talk about what had offended them.

Telephone depth interviews must be treated differently from conventional phone studies. To make them work, it’s important to take these steps:

- Preschedule all interviews.
- Use full-fledged qualitative researchers.
- Write a relatively detailed topic guide but use it flexibly.
- Use a team of researchers for larger studies.
- Listen to respondents’ stories.
- Summarize the interviews immediately.

Preschedule Interviews
Tell respondents honestly how long the interview will last and reconfirm rather than trying to catch them on the fly. When interviewers call, they should proceed only if the respondent is willing and free to talk. Otherwise, set up another time.

Offer a significant incentive fee. As a rule of thumb, we use a dollar a minute for regular consumers; significantly more for executives ($50-$100). The typical quantitative telephone study pays either no fee or only a nominal one, but here it is essential to have respondents who feel they are being compensated for their time. (This in no way biases them in favor of the client.)

A field service is probably best for the recruiting, especially for larger studies. Because this is a new type of study for some field service firms, don’t be surprised if they raise their initial estimates during the fieldwork. Also, expect some respondents not to be available at the original time (one woman was going into labor) and build in costs for rescheduling.

Use Qualitative Researchers
Only experienced qualitative researchers (“moderators”) have the ability to probe vague answers and pick up on subtle cues. This is what sets the depth interview apart from an ordinary interview (and the main reason telephone depth studies cost more).

When a catalog company had a disappointing holiday season, the interviewers’ assignment was to go beyond superficial answers such as prices being too high; we found, for instance, that while most of the former customers respected the company’s quality, several were quite satisfied with lower priced, less durable merchandise bought elsewhere.

Be Flexible Using the Topic Guide
The guides are usually more structured than the ones we use in our focus group studies, making them easier to go through during the interview. This is especially helpful when several interviewers are involved. Whenever a respondent raises a point that needs to be probed, however, the interviewer should follow that lead. (This jumping around can be dealt with in the computer analysis.)

Start off with a question that is relatively easy to answer. For the catalog study, respondents were asked if their overall spending that holiday season was more, less, or about the same as the last few years, then asked reasons for any change. A free-association question (such as “what comes to mind when you think of [a product]”) works well in a focus group as an ice breaker, but would seem awkward over the phone.

Use a Team for Larger Studies
There might be just two interviewers in a study with 30 or 40 interviews, and three to five for samples of 100 or more. A team not only speeds up the fieldwork, it prevents burnout, which is important to maintaining quality.

If possible, brief all the interviewers together.
beforehand, filling them in on the research background and objectives. During the course of the study, be sure interviewers talk about how the guide is working (adjust it if necessary), new issues emerging that should be probed, and any problems that have come up.

The qualitative process is a dynamic one. At the end, debrief the interviewers on major hypotheses developed in the study. Keeping the client informed during the course of the interviewing also can elicit points to probe further.

**Listen to Stories**

Individual interviews provide the opportunity for respondents to describe their experiences with products and services in detail. In our CASE (Consumer Anecdotal Situational Explorations) studies, respondents are asked to describe the who/what/where/when/why of usage situations, along with their feelings.

Expect some surprises. In a study for carbonated soft drinks, for instance, several women talked about romantic moments with their husbands. Focus groups usually do not give respondents the chance to relate their anecdotes at length.

**Summarize Interviews**

Right after each interview, write a brief summary of the key points, including any observations on the respondent’s tone. Eye contact is not possible using the telephone, but a great deal can be picked up through the voice—intensity of feeling, enthusiasm, sophistication of vocabulary, and so on.

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**VISUAL AIDS**

Interviewing by telephone does not necessarily mean eliminating visuals. Among the approaches that can be used are sending materials (ads, catalogs, magazines, etc.) for review prior to the interview or asking respondents to examine that month’s magazine in advance.

For a study of a magazine’s change in format, the respondent and the interviewer paged through the issue simultaneously. In business studies, use another high-tech aid, the fax machine, to send concept statements.

**COMPUTER ASSISTANCE**

New technology helps with the analysis of the individual depth interviews. In fact, without a special software package, it would be nearly impossible to conduct the larger studies.

The topic guide is entered into the computer in advance; the interviewer, with headset on for comfortable hands-free interviewing, types answers directly into the program. Comments of any length can be accommodated, wherever they occur, and skip patterns are easily handled.

Afterward, a printout shows all responses to each open-ended question, either for the full sample or by subgroup (male/female, age group, heavy users, ordinary subscribers, etc.). Individual interviews and interview summaries of each interview also can be printed out.

The program provides frequency counts and averages on the closed ends. In a recent employee turnover study with 200 respondents, for instance, it was possible to get a count on the number who complained of problems with their manager, with training, and so on. For the report, it was easy to pull out verbatim to illustrate key points.

This software is no substitute for analysis—that remains the job of the qualitative researcher—but the sorting and counting is a tremendous aid.

In the future, more high-tech touches may well be added if more consumers own fax machines and the picture phone gains acceptance. Right now, though, the phone offers a less expensive, high-touch way for marketers to hear their customers.