

## **REALITY OF BACK-CHECK CALLS IN MARKET STUDIES IN THE MIDDLE EAST & NORTH AFRICA REGION**

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### **ABSTRACT**

The quality subject of data collection in market research has led to the production of a wide range of research, often taking the form of good practice guides to be used under ideal conditions and we have seen through our professional experience that they are not always available, especially in certain regions.

This study presents results of participant observation and in-depth interviews with professionals in the field, in the Middle East and North Africa region. They are about quality issues and the reality of use of certain quality control tools, with emphasis on back-check calls.

Results show that despite all the barriers from local culture, calls should be carried out anyway, but should not be seen as a single mean of control. Decisions about calls depend on trust in the data collector, and quality of the data also depends on it.

### **KEYWORDS:**

Backcheck calls, Market Studies, MENA Region, Quality Control

### **JEL CLASSIFICATION: M31**

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## **REALITE DES BACK CHECK CALLS DANS LES ETUDES DE MARCHES DANS LA REGION MOYEN ORIENT & AFRIQUE DU NORD**

### **RÉSUMÉ**

Le sujet de la qualité des données collectées dans les études de marché a mené à la production d'une panoplie de recherches, prenant souvent l'aspect de guides de bonnes pratiques à utiliser dans des conditions idéales, qui selon nos observations de par notre expérience professionnelle, ne sont pas toujours réunies sur le terrain, en particulier dans certaines régions.

Cette étude présente donc les résultats de l'observation participante et d'entretiens approfondis avec des professionnels du métier, au Moyen-Orient et en Afrique du Nord, sur les problèmes de qualité et de la réalité de l'utilisation de certains outils de contrôle de la collecte de données, en mettant l'accent sur les appels de contrôle.

Les résultats montrent que malgré toutes les barrières provenant de la culture locale, les appels doivent être menés de toute façon, mais ne doivent pas être considérés comme un moyen de contrôle unique. Les décisions concernant les appels dépendent de la confiance envers l'enquêteur et la qualité de la collecte des données en dépend donc également.

### **MOTS CLÉS :**

Back check calls, Etudes de Marchés, Région MENA, Contrôle Qualité.

**JEL CLASSIFICATION : M31**

## واقع مكالمات التحقق في دراسات السوق في منطقة الشرق الأوسط وشمال إفريقيا

### ملخص

أدى موضوع جودة جمع بيانات في دراسات السوق إلى إنتاج مجموعة من الأبحاث، التي غالبًا ما تأخذ شكل أدلة للممارسات الجيدة، تستخدم في ظروف مثالية، التي لاحظناها من خبرتنا المهنية في المجال، ليست متاحة دائمًا، خاصة في مناطق معينة. تقدم هذه الدراسة نتائج ملاحظتنا كمشارك ونتائج مقابلات متعمقة مع المهنيين في الميدان، وذلك في منطقة الشرق الأوسط وشمال إفريقيا، حول قضايا الجودة وواقع مراقبة الجودة لجمع البيانات مع التركيز على مكالمات التحقق. يظهر أنه على الرغم من جميع الحواجز القادمة من الثقافة المحلية، يجب إجراء المكالمات على أي حال، ولكن من غير الاعتماد عليها كوسيلة فريدة للمراقبة. تعتمد القرارات المتخذة بالنسبة لنتائج المكالمات على الثقة تجاه جامع البيانات، وبالتالي تعتمد جودة البيانات على ذلك أيضًا.

### كلمات مفتاحية

مكالمات التحقق، أبحاث تسويقية، منطقة الشرق الأوسط وشمال إفريقيا، مراقبة الجودة

تصنيف جال: M31

## INTRODUCTION

With the disrupted and disruptive environment in which companies operate today, drowned in a deluge of data, maintaining sustainability without adapting to these changes became difficult. Especially since these data are confused with the debate on consumer's behavior and marked by the significant progress in new information technologies. This adaptation should be oriented to fulfil consumers' needs and starts with an understanding of their behaviors.

Well understanding consumers' needs and behaviors comes through collection of right information about and from them. Market studies, the specialized discipline in consumers' behavior understanding, is also facing difficulties to maintain its reliability with the context that is described above; especially in some regions that are marked by their culture, like Middle East and North African one, below called in this text "MENA region".

They are observations from an immersion work as a market research executive, within a market studies agency based in the region, where daily practices were observed, that initiated the research question of the present paper:

*"What is the reality of use of certain quality control tools, like back-check calls, in market studies in the MENA Region?"*

The available literature on the subject has not allow testing hypotheses, neither on the reality of backcalls, nor on market studies in the region.

However, this has constituted an additional motivation for the start of this research, and helped in the choice of its approach. Consequently, its results must then be considered as a first contribution on the subject, and hypotheses to test for the research to come.

They provide a description of reality of use of some quality control tools for data collection in market studies, with a focus on back -check calls. This description comes from observed practices and an opinions' analysis of 15 field professionals from five countries in the region (Egypt, Algeria, Tunisia, Iran and Saudi Arabia "KSA"), whom

accepted to share their experience about the topic during personal in depth interviews.

The focus in presentation of results about discussion concerning back -check calls, comes from crossing of two points:

- Market studies guides and international standards that mention the importance to use this tool in almost all types of data collection methods, without describing its process;
- Observations of the difficulties that are faced when conducting those calls, and with decision making about them.

### **1- A DISTURBED AND DISRUPTIVE ENVIRONMENT**

Welcoming social networks platforms to internet planet next to virtual libraries, magazines, videos, blogs, scientific platforms, online forums and others, gave birth to what is called “Virtual Communities”, (Rheingold, 1993). This could be considered as new rivers where new specimens of information can be fished.

However, even if those platforms are giving possibility to have bigger quantity of information, their availability, their easy use, their free access and especially the almost uncontrolled freedom of expression offered through them, is causing what is called by some : “information’s deluge”.

Companies from this situation face two difficulties: Controlling the communicated information about them, to their target consumers and understanding their consumers’ behaviors.

They “have been increasingly relegated to the sidelines as mere observers, having neither the knowledge nor possibility (or, sometimes, even the right) to alter publicly posted comments provided by their customers.” (Kaplan & Haenlein, 2010).

On the other side, consumers are opening a debate about the behavior between two counterparties of researchers. The first ones are those competing to find an original name to demonstrate the change of this behavior like “The modern consumer” (Desjardin, 2019), « the connected consumer » (Bryl, 2019), « consumer 2.0 » or « The consum’actor » (Dubuisson-Quellier, 2011). The second ones are those denouncing the abuse of language that talks about consumer’s

empowerment to be just an illusion, like “Un mythe moderne: le pouvoir du consommateur” (Gross, 2015) or “Quels Pouvoirs pour le Consommateur?” (Filser, and Vernet, 2011).

The MENA Region has not been spared by the evolution: MENA Region didn't escape to the above described disturbance, as both consumers and companies are also swept away by this whirlwind of rapid progress of new information and communication technologies.

Even if integration to this change was slower at the start, compared to other regions such as Europe or North America, most of the published numbers about the use of internet, smartphones or online shopping for example, show that the region's characteristics are getting closer to the European and North American ones.

For example, a study conducted in Middle East Region, by Mc. Kinsey & Company (May 2019), a global management consulting firm, shown that 50% from the interviewed consumers admit being less loyal to brands, because they prefer cheaper options. It also shows that 30% of them prefer online shopping and, the young people are getting more attracted by local offers, because they are more concerned about the quality of the products they use.

Another study conducted in 2012 and 2013 with consumers over eleven Arab countries from MENA Region, revealed that even if Arab people are happy with technology's progress and multiplication of news' sources, they however have some objections in regard to their reliability. Also, when cellphones usage is showing an important increase, especially for internet usage and social networks, it seems as if participants don't totally trust them, as 40% revealed having been victims of phone crimes and 90% say that their contact lists on social networks consists mainly of people they know (Ictqatar,2013) . This may show some fear and caution in their use.

Companies are facing the same difficulties like their counterparts from anywhere else, for understanding their target consumers and satisfying their needs, with the above listed more demanding characteristics. The above mentioned Mc. Kinsey's survey recommends companies in the region to work on improving and adapting their added value to those evolutions.

## 2- ADAPTATION, AN INESCAPABLE REACTION

### 2.1- For companies

It seems like consumers' behavior status will remain under discussion, and it is difficult to choose a side from those convincing arguments. But is it really necessary to choose? Isn't it more pertinent to take this debate as a whole, a situation or a context on which building a reflection? What is to be kept in mind is that there is an evolution of the context, which is showing a complex environment with many parameters to be managed by companies, and that this situation is challenging them on achieving their common main goals: "maintaining their longevity". This is the main listed difficulty in researches that talk about companies' relation to their environment.

Even if longevity's perception differs from stakeholders' view, it remains all about the ability of the company to upkeep itself, to renew itself and to adapt (Benghouzi 2009, pp177-181). This adaptation *«...requires a learning mindset. By constantly learning about your organization and your business environment, you acquire the knowledge to make informed adaptation choices....learning includes staying abreast of technological development, understanding your customers and tracking market trends»* (Schwisow, 2019)

### 2.2- Even for market studies field

The use of market studies is not recent and it has seen an evolution according to companies' evolution through time. An overview of this evolution is presented in paper: "The Evolution of Market Research" (Alioto, 2014), where author goes beyond talking about the quantitative evolution of market studies field, which shows a multiplication of number of specialized agencies, but talks about its qualitative evolution by presenting five major changes that impacted this field:

- Going beyond the economic aspect to get interest to understanding consumers' behavior as a whole, without neglecting their irrational aspect;
- Considering consumers' environment and its ability to influence their behavior;

- Using technology, especially social networks, with birth of online surveys and smartphones use, and their impact on collecting methods;
- The appearance of “Big Data” notion that led marketers to consider many aspects when analyzing consumers’ behavior, and by adopting a multi-dimensional approach;
- Changing results presentation forms, since stakeholders no longer get satisfied with traditional PowerPoint or PDF reports’ presentations, but expect to be told stories.

As for companies, consumers or any other economic actor, the most significant change remains new technologies progress, and market studies field has no choice but to get adapted to this progress to maintain the reliability. Thus, the use of digital solutions such as online surveys, smartphones use, the development of online applications and platforms in addition to the use of small tools like digital boards for focus groups moderation, allow to facilitate fieldwork, gain time for data collection and to bypass many other quality issues that will be presented in the next point.

### **3- OVERVIEW OF QUALITY IN MARKET STUDIES**

Market studies field was born at the end of 1910s, the first psychological studies on consumers came into being in 1920 and initiated the birth of specialized agencies

Interest on quality in the field from its side, according to Debrah Harding & Peter Jackson (2012), began during the 70s and 80s, where quality notion was used in reference to the validation task which is performed after data collection. This notion then took a step back in the 90s to focus on the entire process of a market study, and to see the beginning of standardization. Today, and since the beginning of 2000s, with digitalization of collection and analysis methods, quality turned to the reliability of respondents, in addition to the validity of collected data as well as the respect of confidentiality.



From the literature side, most of it seems to be either “how to” guides to help marketers in quality control of a certain step of a market study process, or a code or standard to be taken as a reference.

### **3.1- In the “how to” guides to help marketers in quality control of a certain step category**

Publications are generally found on specialized websites or on market studies companies websites. They for example are either presenting their quality control process to their visitors, or gathering innovative solutions to ensure the quality of their samples.

Websites or specialized platforms publications list is long, and it is possible to find several ones only by typing key words like “Quality and market studies”, on browsers to have larger choices.

On the other hand, more academic publications are mainly focusing on explaining quality of one part or step of the study like the one of Boris Toma, Daniel Heinrich & Hans H. Bauer (2017): « *Data Quality in Marketing Research – How to Determine Accuracy in Online Questionnaires* », chapter from their book: « *The Customer is NOT Always Right? Marketing Orientations in a Dynamic Business World* », questioning efficacy of actual methods to determine quality of collected data during online surveys, or Flintermann (2016) who analyzes the reliability and validity of secondary market studies reports sold by certain companies.

### **3.2-In the code or standard to be taken as a reference category**

The most common ones are those issued by international/national standardization organizations, or from global market research associations, and the most famous one is the standard ISO 20252 in its three versions (2006, 2012 and 2019): *Market, opinion and social research, including insights and data analytics – Vocabulary and service requirements*. It is the standard that: “...establishes guidelines and requirements for the conduct of market studies, including planning, on ground activation, supervision and reporting of results to clients who have contracted them” (Gasiorowski-Denis, 2019), and is besides the standard that is recommended by other associations to their members.

It suggests 351 checkpoints throughout the process of a market study that are inspired and adapted from those of ISO 9001 standard. They can be gathered in sections intervening for its users at:

- Service level: allowing them to improve their service from quality and time terms;
- Organizational level : providing them with better operational management and a mastery of the process of carrying out studies;
- Quality level : helping them to limit errors;
- Image level: offering them a competitive advantage and a key to enter international markets.

The above impact points are for market studies agencies that will follow the standard’s requirements. From clients’ side, the standard will allow them according to Don Ambrose, Chairman of the ISO Technical Committee for the standard’s review, is to obtain compatible, comparable and consistent feedback globally and to have better criteria for selecting service providers.

As mentioned previously, other guides are specific to each association and the majority are ethic codes for the profession, established to direct members on their practices, especially their relations with clients and with participants to the studies. For technical or operational aspect, associations generally recommend their members to refer to ISO 20252 guidelines.

Below is a summary table of some of the most famous guides:

**Table 1 :** Market studies international guides

Association	Guide /Code
ESOMAR	ICC/ESOMAR International Code on Market and Social Research (ESOMAR, 2016)
	ESOMAR/GRBN code for online research. (ESOMAR-GRBN, 2015)
Marketing Research Association	MRA Code of Marketing Research Standards (2013)
IQRS (Interviewer Quality Control Scheme)	Minimum service standards for market research data collection (2013)

*Source: Authors.*

#### **4- APPROACH AND METHODOLOGY**

Literature review results didn't show a theory or a purely literary research, exposing a description of quality in a market study (for example through its theoretical process) without including a case study, or without mentioning a particular context. This leads us to conclude that quality in market studies is more a professional question than an academic one.

This study is not meant to be an exception from an approach side, as it is treating the topic in a specific context and through a case study, drawn from our professional experience as market research executive. However, in addition to the different context, (that is more familiar for us: North African and Middle East region and culture), there will be some differences with a focus on data collection struggles and reality of use of quality control tools especially the back-check calls.

Reflection began in 2016, when we joined the market research agency in Cairo (Egypt), as a trainee market research executive during 6 months before being confirmed to the position. Field participant observations of daily practices for market studies conduct had been done in an intensive way during the first two years, and this by keeping a logbook.

In addition to being trained to the job functions, knowing the agency's internal environment, and getting familiar with the local culture, participant observation had the purposes of:

- Identifying data collection challenges;
- Framing daily practices around data collection, especially those related to quality control.

After that, a literature review was done to understand the observations, to compare them to other references and to identify differences or gaps that need to be probed.

Following this and accordingly, a discussion guide had been designed to probe about differences between findings of literature and observed reality, with involved actors from Egypt agency and from other sister ones in neighbor countries (Algeria, Tunisia, Iran, Saudi

Arabia). They are 15 market research professionals from different management levels and with different numbers of years of experience.

Below is a summary table of interviewed profiles:

**Table 2:** Sample characteristics according to position, country and number of years of experience.

<b>ID</b>	<b>Position</b>	<b>Country</b>	<b>Experience</b>
<b>R1, Alg</b>	General Manager	Algeria	>20 Years
<b>R2, Alg</b>	Quality Control Executive	Algeria	<1 year
<b>R3, Alg</b>	Responsible pharmacist	Algeria	>5 <10 years
<b>R1, Egy</b>	CEO	Egypt	>20 years
<b>R2, Egy</b>	Deputy Managing Director	Egypt	>10 years
<b>R3, Egy</b>	Business developer	Egypt	>5 <10 years
<b>R4, Egy</b>	Executive manager	Egypt	>10 years
<b>R5, Egy</b>	Market Research Executive	Egypt	>5 <10 years
<b>R6, Egy</b>	Clinical research manager	Egypt	>10 years
<b>R7, Egy</b>	Operation manager	Egypt	<5 years
<b>R8, Egy</b>	Operation Executive	Egypt	<1 year
<b>R9, Egy</b>	HR Manager (Previously Operation executive)	Egypt	>10 years
<b>R1, Ira</b>	General Manager	Iran	>10 years
<b>R1, Tun</b>	General Manager	Tunisia	>10 years
<b>R1, KSA</b>	Research Executive	KSA	>10 years

*Source: Authors.*

Interviews lasted around one hour each, and those that was conducted with actors from Egypt agency, and from Algeria, happened face to face, while the rest from other countries was conducted with questionnaires exchange via emails and Video calls.

Choice of different levels in management (Owners and top level managers, mid-level of managers, and executive level) had aimed to get different points of view from those who are closer to field and those who are closer to clients. Choice of different number of years of experience (from 2 to 30 years) had aimed to have an overview about the evolution of the context, of practices and of field difficulties. Finally, the choice of different countries was made to check if there were differences in practices between countries with close cultures.

## **5-RESULTS**

### **5.1-From participant observation crossed with literature**

#### **5.1.1. Data collection and quality control practices**

Concerning practices around data collection, nothing specific was observed for data collection itself. They are practices described in any literature about quantitative and qualitative research like: “Les Etudes de Marchés” (Caumont, 2016), “10 Essential Market Research Methods” (Boyd,2019) “Fundamentals of market research techniques An e-book from Charterhouse Research” a book posted by a British market research agency, or “Essentials of Marketing Research” (Shukla, 2008) and many others.

For quality control practices, observed actions are those described in literature too, from data collection agents’ briefing and training, to pilot interviews, GPS tracking, visit evidence collection (business cards, photos, contact details record), to audio records, data validation, and back check calls.

All control tools were observed, but it seemed like there were difficulties of using some of them more than the others, and the ones that presented the most difficulties are back-check calls.

#### **5.1.2. What are back check calls?**

Originally, the expression comes from "data verification" which can be carried out personally, by ordinary / electronic mail or by telephone. However, our interest was focused on those carried out by telephone, because these are the ones that we noticed being used the most during our field experience.

Difficulties that was observed, urged us to know more about the use of this tool, but none of the guides or of the reviewed literature, offers a description of its process or even a formal definition of it.

From our side, we had a definition from the dictionary for “to control”. It is: “The action to control something, someone, to check their state or situation, in comparison to a standard”. From this, a back-check call in a market study would be: “The action to control the collected data (Something), the respondent and the investigator

(someone), to check their content, profile and work (state), in comparison to the research questions, the screener, and the correct use of collection tools (a standard).

Concerning the process of conducting back-check calls, neither guides, nor standards or literature explain how they should be conducted; By whom? Or what are the decisions to be made for each situation? They only list the tool in the possible ones to be used for quality control of data collection, and provide small general recommendations.

For example: Insights association (2019), mentions that *“The respondent is contacted after the research and questioned about the interview and the interviewer. This process authenticates the collected data by ensuring responses were provided by the actual respondent.*

*The subsequent re-contacting of respondents in a survey to check that the proper procedures have been followed, e.g. the respondent was qualified to be included in the survey, the responses recorded were accurate or even that the interview actually took place. Validation can be performed by the data collection company and/or the client, in person, by telephone, or by mail”.*

From its side, the worldwide association ESOMAR, mentions in its guide which was established in cooperation with the International Chamber of Commerce that, researchers should inform the concerned persons about the eventual activities implying to re-contact them, and that those ones should accept it (ESOMAR, 2016).

The Interviewer Quality Control Scheme (IQCS), established by the IQCS Council in 2020, also recommends back -check calls for each data collection in its chapter about data validation.

### 5.1.3. Decision making about outputs of the calls

As previously mentioned, even if these guides recommend the use of back -check calls, no information is given about how to do them, and this is making the task look as easy as to “ringing up someone”.

However, observations in field about practices around back check calls, shown many difficulties that were faced for reaching respondents and with decision making for different cases (No answer, wrong number, deny of participation, different replies to same

questions from interviews). This guided the present research to know more about how the same case can lead to different decisions: *a no reply is accepted in one project but not in another one, from one investigator but not from another one...etc. Some calls are discussed during 2 to 3 days! And there were often remarks about local culture to justify those cases, like "ladies don't reply because it is not acceptable to call a lady after a certain hour", "This consumer denies his participation because people are afraid to give too much details over phone with the actual situation in this country"...*(Personal logbook, 2018).

The previous mentioned studies and publications, about evolution of the MENA region consumer's behavior, confirmed the existence of cultural influence that may constitute barriers to the smooth flow of back -check calls. For example, the publication fears of people about phone hacking in the region and their selective contacts' lists on social media, may justify non replies, and identity deny of some back check calls.

However, literature did not completely reply to questions about observations, and this is why field professionals were called to share their experiences about the topic and get further explanations.

## **5.2- Results from in-depth interviews**

### **5.2.1. What is a good quality data?**

Before discussing quality issues and the use of quality control tools, participant were asked to describe data of good quality, and descriptions were almost the same for all:

It is the data that first comes from the right respondent, who fulfils the recruitment criteria (possible to be confirmed), for whom questions were correctly asked and who had well understood them. Then all questions should have been answered and must show a certain logic within the same questionnaire or discussion guide (no answer should contradict another), and in comparison to others (answers should not deviate too much from the general trend, or these deviations should be explained), they finally talk about data "to make sense".

Even if all participants agree about the above description for data of good quality, two from top level management (R2, Egy and R1, Alg), made the same comment before giving their description: *“Quality can’t be described it must be proved”*.

This description was coherent with recommendations of guides and standards, like the one given in the IQCS in its Data Validation Chapter. However, observations shown that this description was an ideal one, and that there were many barriers stopping from reaching this ideal situation.

### 5.2.2 What are barriers to quality in a market study?

After framing the meaning and opinion about quality in field, respondents were asked to tell about barriers to the accomplishment of the above. And here, cheating in all its forms (false participants / false questionnaires/Fake business cards/Fake pictures from field) was the common listed barrier by all respondents. Only one from Algeria (R3, Alg), whom the agency is specialized in market studies in medical field, mentioned that cheating was not an issue for them, since they are dealing with doctors they know, or with patients who had been recommended by doctors they know, and so identity and participation are easy to confirm.

The second most listed quality issue was Questions’ misunderstanding, and so the quality of the data collector (also called investigator, interviewer or moderator).

Other quality issues were almost specific to different management level categories, since top management level complains about difficulty to find the right respondents and convincing them to participate, especially with tight budgets. They also complain about length of interviews that pushes people to give up (in Algeria), about confidentiality management and sample size (in Egypt) and geographical coverage of some regions (in Iran).

In the other hand, executive level professionals mainly talk about difficulty to confirm identity and true participation of respondents.

Talking about difficulties that are faced in field, shown that quality issues appear at three levels, which are the respondent, the



interviewer and the collected data. This led the discussions with field professionals to quality control tools that are used to face these issues.

### 5.2.3. What are actions to ensure quality of data collection?

During interviews, all respondents with no exception mentioned that whatever the deployed means to control, dishonest investigators will bypass them.

Those from top level management and with the biggest number years of experience, mentioned that control is more done to scare investigators than to detect cheating, and that we will never be sure to avoid quality issues at 100%, but just do our best to reduce them as much as possible. *"... Quality checks are done to scare field researchers, to let them know and feel they are controlled, and this will make them think twice before trying to cheat..."* (R1, Alg), *"... whatever you will do, field researchers will always find a way to bypass this barrier. They tampered with questionnaires, business cards and even doctors' stamps..."* (R3, Egy); *"... Actions for quality control are done to reduce quality issues, as you will never be able to eliminate them all...there will always be human errors"*(R2, Egy). They then talk about the importance to do quality control from the beginning of the study (research objective definition), and describe actions to be done as ideally described in guides and standards.

On the other hand mid and executive levels talked about validation actions, and described them as they are in guides and standards, like the above mentioned description of the IQCS.

Other ways that had been mentioned were the use of new information technologies for online data collection, interviews' audio and video recording when possible, and sending supervisors for surprise visits to fieldworkers and asking for evidence of visits like business cards and photos from field locations.

Another way which hadn't been found in literature but was listed by those from top level management with big experience in field, is a detail about age and number of years of experience of data collection agent, or whom they called "investigator".

Concerning this, when those from mid and executive level talked about "investigator of good quality", "smart investigator", "cunning

investigator”, who knows how to probe, is honest, involved in and interested with the study, two from very top level management talked about age and number of years of experience of investigator.

According to them, for quantitative studies that request face to face interviews in field, it is better to have young investigators, who will be able to move from place to another. A maximum 3 to 4 years of experience will also be ideal, because it will be enough to do the job correctly, and not enough to understand the concept of general trend of answers. This will avoid them to be tempted by self-completing the questionnaires.

In the other hand, qualitative studies where in depth interviews or focus groups with longer time to be spent with respondents are requested, it is better to have older investigators with a bigger experience allowing them to have a mastery of the topic, and patience to probe and to make respondents talk. “...they are supposed to be wiser...” (R1, Egy).

### **5-3- Focus on back check calls**

We can notice that points of view about quality control actions differ according to respondent’s management level, since top level ones think about quality as a whole, or something to be done throughout the study’s process, and executive and mid level think about it from daily actions they perform. What was common is that at all levels and in all countries, back check calls to confirm identity of respondent first, then to probe and complete missing data when necessary, was mentioned. For this reason, this paper will only present results of discussion about this tool, even if all tools and actions for quality control had been discussed in details.

#### **5.3.1. Frame of the usage of the tool**

As mentioned earlier, neither literature nor guides describe the usage of back-check calls, so framing all elements around this came from observations and analysis of discussions with field professionals. This helped to determine the possible triggers of a call, the criteria for choosing the back-check caller and a description of the process.

There are two possible triggers to a back check call, and they are both inspired and respect what international standards and guides, like IQCS, recommend.

The first one are internal SOPs (Standard Operating Procedures), that impose conducting an average of 10% of back check calls from the total sample size of each interviewer. They generally aim to confirm that the interview happened, and that the respondent is true. The second trigger is a found anomaly (missing answer, illogical answer, an unexpected answer) during data validation, and its purpose is to correct the anomaly.

Concerning the back-check caller, whatever the trigger is, the most important to be taken into consideration, is that the back-check caller doesn't personally know the data collector, or is not acknowledged about who collected the data that she/he is about to conduct the call for. This seems to be a very important point, but is not recommended or mentioned by any international standard. Professionals are convinced about if the controller knows the data collector, friend relationships will push back-check caller to relax the control task and accept some quality issues.

Concerning the process, whatever the trigger of the call and the back-check caller are, conducting each call follows the same basic steps: Introducing themselves and the company, reminding and thanking about participation to the study, confirming identity of the participant, asking additional questions to complete or to correct data.

### 5.3.2. Difficulties that are faced when conducting back check calls

Describing the steps, and reviewing the way guides and standards talk about using back-check calls, make the task look easy. However, observations and discussions with field professionals show that there are many difficulties that can disturb the process and this at every step of it. They are :

- A no reply to the call, a fake or a wrong number when calling;
- A deny of identity or of participation;
- Refusal to cooperate by answering additional questions;

- Giving contradictory answers to those collected by the investigator.

According to the majority of interviewed professionals, the main difficulty when conducting back check calls are people who deny that they have participated for many reasons. It is followed by lack of cooperation when trying to probe some of their answers, and by wrong numbers.

Those barriers are caused by several possible reasons that are caused by a mistake from the agency, or by the influence of the local culture.

The first possible mistake from the company happens when investigators delay in delivering data, causing the delay of back check calls, which can increase the probability that participants forget about their participation.

The second possible mistake is a result of a wrong introduction of the company and the study, by the back check caller, which makes the called person being afraid and avoiding the call.

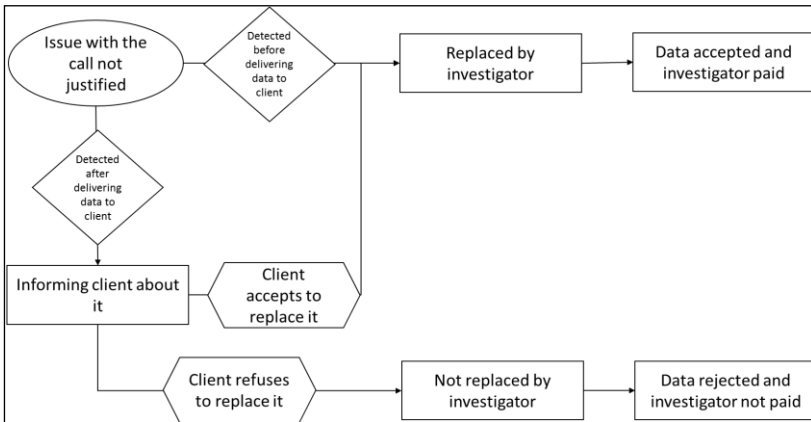
The other reasons that are related to the local culture are:

- The language barrier when they have to conduct calls abroad;
- The fear of people when receiving a call from someone who knows their name, and so deny their identity;
- Women who do not reply to calls from numbers they don't know after a certain hour, or don't like to talk to men they don't know;
- The length of interview that pushes respondent to get bored, and so to avoid the phone call, because they are afraid that it will take too much time again;
- The wrong approach from the investigator, who wasn't nice to them, and so they want revenge and cause him/her troubles;
- The time at which the call is conducted, and that may be considered as inappropriate.

If any of the above listed cases are faced, then collected data for the called participant will be suspected (investigator self-completed the interview, respondent was fake), and discussion is opened about accepting this data or rejecting it.

The decision will depend on the possibility to justify the anomaly, and happens according to the below concluded process, from field professionals' explanations:

**Figure n°1:** Decision process for a back check call



Source: Authors

When it came to the evaluation of accuracy of back-check calls to be considered as a quality control tool, knowing the above listed possible reasons, the majority of professionals avoided to reply directly and resumed the description of an ideal situation. They talk about the necessity to run 10% back-check calls on each interviewer's sample, and then continue to 50% or to the whole sample if some issues are faced with the 10% (a lot of no answers, wrong numbers, or people denying they participated...).

Even after probing with: *"ok, this is an ideal situation you are describing and you are telling me about the process, but knowing that there is possibility for people to deny for example just because they are afraid from the call, how can we trust this?"*, participants kept on telling about the ideal situation and mentioned that decisions will be made with "intuition" (R8, Egy), "presentiment" (R1, Alg) and "trust toward the data collector" (R1, Tun).

## CONCLUSION

Reviewed literature, and international guides and standards, do not give details about the use of back-check calls, but only recommendation to use them as a quality control tool. This is making the task look simple and feasible in all cases.

However, observations and discussions with field professionals from MENA region, shown that this was not the case, and that many barriers are faced when conducting them. This is questioning the possibility of use of this tool, but professionals confirm the necessity to do it, exactly as recommended by international guides and standards.

Those barriers that are either the company's mistake or the influence of local culture cannot be ignored, and many precautions are taken to ensure their smooth running.

They are: respect of deadline to conduct the calls (from 4 days to 2 weeks depending on the respondents' type), and back -check caller approach, starting from the choice of the right moment to call, then by the right introduction of the company and of the study, trust and cooperation of each people.

Decisions concerning different cases of calls will depend on each project's course ,especially on investigators attitudes during fieldwork, and on trust toward them.

Finally, even when those precautions are taken, according to professionals, this tool should not be relied on alone but only be considered as a complementary tool for quality control next to many other ones.

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«المخلص الرقمي 25 من آخر أخبار الإنترنت و التطورات التقنية التي قد تكون قد فاتتك، و التي يمكن أن تؤثر على قطر و الشرق الأوسط» الإصدار الثامن، <https://www.slideshare.net/ictQATAR/ss-23769775>