

¿Por Qué?

Questions Of Validity In Hispanic Survey Research

By Ricardo Lopez, Hispanic Research, Inc.

By now everyone knows about the growth of the U.S.'s Hispanic population, and many companies now include Latinos in their research plans. The research industry has responded eagerly with an unprecedented number of companies offering Hispanic research services. This is a positive development.

When I started suggesting including Latinos in general market research in the mid 80's my clients thought I was crazy; and I probably was, because there were then very limited options for appropriately fielding a Latino survey. Things have changed! Or... have they?

Today almost every big player (and many smaller ones) claims to have the ability to conduct Hispanic market research. The problem is that research companies are surveying Latinos using the same "proven" process that have been established to be successful and appropriate for general market studies. There is ample evidence, however, that conducting research with Latinos using this "proven" approach yields invalid research data.

To understand how Latinos respond to surveys we need to appreciate the cultural differences between Hispanics and non-Hispanics. A lot can be said regarding the fact that the "Hispanic community" is really a U.S. marketing invention that was fueled by our industry's eagerness to classify individuals who did not fit well into our standard classification

categories. After all, Hispanics come from as many as 20 different countries of origin and include individuals of every race.

However, there is no denying that most Latinos share a common language as well as certain cultural characteristics and values that unite them as a group. In fact, many Hispanics in this country have come to identify themselves with their "Hispanic community." These commonalities set Latinos apart as a market segment and differentiate them from non-Hispanics. We need to look closer at the Hispanic/non-Hispanic differences and why they affect data collection methods and data validity.

Many Hispanics are new immigrants who were born outside of the U.S. and are not as familiar with opinion polls and survey research. Opinion research is such a big part of American society that we can assume respondents know about surveys and polls; but in most of Latin America consumers are not as exposed to marketing research as we are in the U.S.

As a result, many Latinos approach survey questions as if they are an academic exam





or a government form because this is their only frame of reference. In that mindset, the Latino respondent struggles to come up with the correct answers to the survey questions. Logically, giving the wrong answer always has negative ramifications when completing tests or government forms. In researching Latinos, especially unacculturated new immigrants, great care must be taken in explaining the research process.

Not being familiar with surveys also has other consequences. Again, in our industry's American mentality we take much for granted. For example, we assume that people are familiar with the concept of a number scale. When asked to rate something on a scale of 1 to 10, many new Latino immigrants will select either 1 or 10 because they

do not know that they are allowed to use numbers in between.

Education also plays an important role in the respondent's ability to complete a complicated survey instrument; and U.S. Latinos as a group have a lower educational level than non-Hispanics. Another factor that creates confusion in Spanish language surveys is the language used in the Spanish translation. Very often researchers purposely instruct translators to translate a survey verbatim because to avoid interpretation errors it has to be exactly the same as the English version. The problem is that this always yields a very awkward and confusing question narrative that often results in more significant data errors.

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Some Things Get Lost In Translation

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Some words are impossible to translate because they do not exist in Spanish. The word "parent" is a good example. In Spanish we say either "mother" or "father" and do not have a word for "parent." Other language concerns include differences in some of the Spanish words used to describe the same object depending on the country of origin; but these concerns are not as important as the overall survey communication approach.

Hispanics generally communicate differently from how non-Hispanics interact. Latinos usually prefer a more informal/emotional communication approach. In interacting with each other Latinos strive to connect emotionally before any exchange of information takes place. This tendency transcends all communication topics.

Even in commerce, Latin Americans often do business by befriending each other first, and then work out the details after the deal is practically sealed. Latino communication relies heavily on non-verbal gestures, tangents and storytelling. Hispanics connect with each other by avoiding structure. The communication thrives when it occurs in a typical Latino laid-back setting; only then do Latinos feel comfortable expressing their true feelings and opinions. A rigid structure brings out the feeling of governmental or academic communication. As can be surmised, how Latinos prefer to interact is the antithesis of how quantitative research communication is normally structured.

Cultural issues also contribute significantly to Hispanic research error biases. The Latino tendency to "be nice" in answering survey questions is culturally based. Once a Hispanic respondent agrees to the research interview, he or she usually feels compelled to do his or her best to be respectful to the interviewer and to not offend the sponsor by giving negative opinions.

The Latino behavior when it comes to propriety and respect can be significantly different than that of non-Hispanics. Hispanics place a lot of weight on teaching their children the value of respect; they often engage in respect-induced cultural rituals that would seem ridiculous to non-Hispanics. The popular crossover phrase "mi casa es su casa" (my house is your house) is a prime example of this attitude. It is not unusual for Latinos to introduce themselves to a stranger by adding the words "a servant" after their name.

From a research standpoint this cultural affinity results in Latino respondents working very hard to answer the questions according to what they think the interviewer or research sponsor wants to hear. The issue is greatly compounded when Latinos receive an incentive honorarium for their responses because they then feel even more compelled to "be nice."

The science of statistics dictates that to avoid errors in the data, all questions need to be asked to all survey respondents in exactly the same manner without any deviation or interviewer

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Validity Concerns In Hispanic Research

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interpretation. Field companies take great care training interviewers to only repeat the question if it was not understood by the respondent and to take only a response that exactly matches one of the alternative answers given in the survey.

Rephrasing and interpretation is not considered appropriate.

When conducting Hispanic quantitative research this practice can be extremely frustrating to the Latino respondent and often results in serious validity issues that dwarf the interviewer bias errors we seek to control. The problem is so pervasive that it affects the majority of all Latino surveys being conducted. Here is a typical scenario that one may witness when monitoring a Latino survey.

INTERVIEWER: Which of the following would you say is your favorite color? Is it white, green, blue, yellow or red?

RESPONDENT: Oh that's a good question! I think my preference comes from when I was a little girl. I remember that my grandfather used to take us out every Saturday for ice cream in his bright red truck. I have such good memories of how that truck would shine in the sun! It really makes me feel good about the color.

INTERVIEWER: Then, which of the following would you say is your favorite color? Is it white,

green, blue, yellow or red?

RESPONDENT: Well... just as I said before.

INTERVIEWER: Ok, is it white, green, blue, yellow or red?

RESPONDENT: Blue?

INTERVIEWER: Is that your answer?

RESPONDENT: Yes, I guess...

What happened here? The Hispanic respondent was communicating in a typical Latino fashion using tangents and storytelling. She thought she was being perfectly clear in her response and did not understand why the interviewer refused to take her answer. She could only guess that the interviewer was hinting that her answer may not be what they want to hear. So to please the interviewer she changed her answer. The frustration felt by the respondent in this interaction would have also affected the rest of the survey.

Some survey research methodologies are more effective than others in obtaining the Latino opinion. As you can gather by now, the more personal the interaction, the more effective the survey is in engaging Hispanic respondents. This means that in-person administered interviews generally work best, followed by interviewer-admin-

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Validity In Hispanic Research

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istered phone interviews.

Computer administered phone interviews and self-administered online surveys are not as effective because they are considered impersonal and "too structured" for the way most Latinos prefer to communicate. Self-administered paper surveys are far at the end of the effectiveness spectrum and should be avoided when interviewing un-aculturated Hispanics.

While the research industry has responded to the demand for Hispanic research data

collection, it has failed to do its homework and is acting on the assumption that the industry's "proven" research practices apply to Latino survey research. As this article demonstrates, they do not.

As an industry we have the responsibility to adapt the research process to improve Latino data validity. A basic understanding of the Latino culture is necessary to conduct effective research with Hispanics. We must adapt our approach and not act blindly thinking that we can merely translate a questionnaire, use a Spanish speaking interviewer and achieve good results.

There are many other issues that affect the effectiveness of Hispanic market data collection:

- Sampling accuracy often suffers because of the Latino tendency to live in households with many family members, their transitional or legal status and their propensity for not having a phone registered in their name. Many sample companies do not have a good representation of un-aculturated Latinos.
- Demographics that are commonly collected in general market surveys do not necessarily have the same connotation when interviewing Hispanics. Income, for example, is usually problematic because many have difficulty understanding the concept of household income. They often live in large households that house what we would consider the immediate family as well as other family members like aunts, uncles, cousins and grandparents. Not only do respondents not know what their other family members make, the whole concept of household income becomes meaningless for comparison purposes. Income is also not a good measure of Latino social status because many highly educated new immigrants have disproportionately low income levels, while others with very low education may earn high incomes in demanding blue collar jobs.
- Many companies translate open ended responses and then code those responses in English. This practice results in significant coding errors. Coding should be conducted in Spanish and then the codes can be translated into English.
- Homework, diaries and other heavily structured or complicated exercises do not work well with Latinos and should be avoided.

Steps To Improve Latino Data Collection:

- Understand that Latinos communicate differently and that their cultural background affects their responses to a survey. Hispanic staff managers who understand the Latino culture helps avoid the pitfalls of working under false assumptions and misconceptions.
- Allow interviewers to communicate in a Latino style. Brief them on the purpose of the research so they can prevent the introduction of interviewer bias while allowing for Latino storytelling and interviewer interpretation. Build the extra time required into the cost structure.
- In the questionnaire design, take some time to explain up front the importance of total honesty in their responses and how "being nice" means giving negative responses, if warranted. Design instruments that use simple ordinary language and avoid complicated scales, grids or responses that require percentage summation. Also avoid complicated homework assignments or structured diaries.

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Other Factors To Consider In Hispanic Research


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- For Spanish surveys the questionnaire should be either written in Spanish first (if the interviews will be conducted only in Spanish) or translated by a research professional who understands the importance of maintaining the same meaning while making it flow correctly. Do not insist on a verbatim translation that can result in detrimental data errors because of language misunderstanding.
- Use Spanish speaking coders to code Spanish open-ended responses.
- Test the questionnaire thoroughly with Latino respondents and monitor closely to identify potential cultural issues that may be affecting the Latino responses.

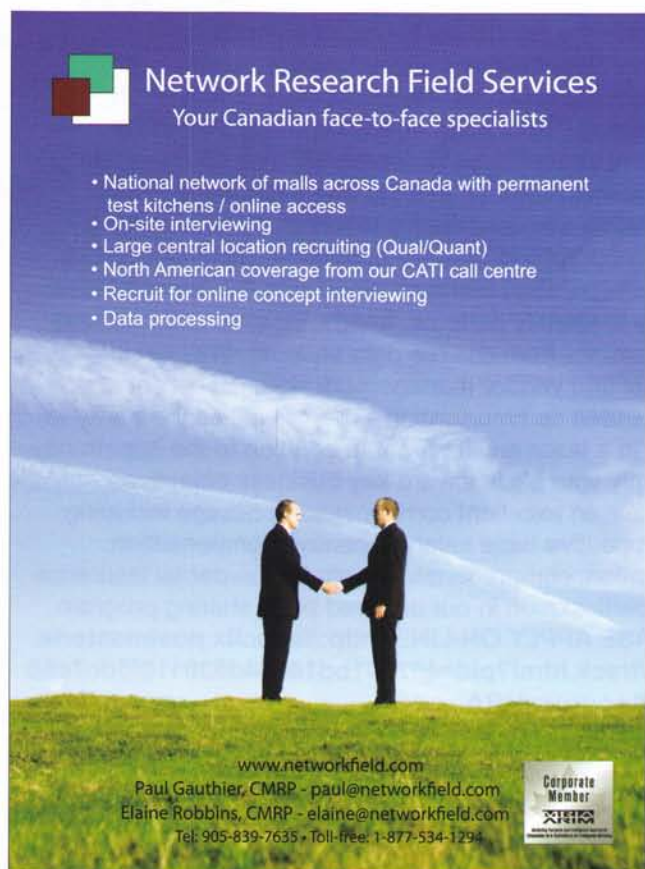
Other Factors To Consider:

- Despite popular belief, Hispanic is not a race. This critical misconception can significantly affect a research project. The term should never be used in conjunction with race categories like "Black" or "Caucasian." Not only is it technically incorrect to use the term as a race category, it also creates confusion among research respondents because some Latinos have come to believe that their race is "Hispanic" while others vehemently oppose selecting "Hispanic" as their race. Misunderstanding this issue can lead serious validity concerns in Hispanic survey research.
- Many online research companies are promoting statistics that demonstrate that Latinos are progressively more Internet-connected and that online research is a viable methodology for reaching Hispanics. While there is no doubt that many Hispanics are now online, they continue to be the more acculturated and/or assimilated Latino consumers; the unacculturated new immigrants are unlikely to be properly represented.

• While the numbers may be there, online quantitative research is currently (for the most part) a self administered survey methodology that Latinos see as unfriendly and impersonal. On the other hand, communication over the Internet is also changing and is becoming more personal. Higher bandwidth allows for more widespread use of multimedia content and may soon offer the ability to effectively conduct interviewer-administered Internet surveys.

• Is it Latino or Hispanic? One question that always pops up is the appropriateness of using the term "Latino" versus the term "Hispanic." Which one is correct? The answer is both. The terms "Latino" and "Hispanic" are used synonymously in business and are both generally accepted when referring to the U.S. Latino community. However, in the Latino consumer's perspective, the term "Latino" is often preferred as it is the correct Spanish word to define people who come from Latin America. "Hispanic" as a term is rarely used in Latin America and it sounds odd in Spanish. 

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