

Field Research

How to undertake field research

The aims of this chapter

This section of the training manual is designed to provide an overview and introduction to some of the issues that arise when embarking on field research. It should be read in conjunction with the other sections of the Manual: field research can be an essential and integral aspect of your overall strategy.

This chapter is divided into four key sections:

Section 1. The value of field research

Section 2. Verifying and gathering new information

2.1 Gathering balanced and credible information

2.2 Interviews

Section 3. Safety

3.1 Interviewees

3.2 Personal safety

Section 4. Your field research checklist

SECTION 1. THE VALUE OF FIELD RESEARCH

Field Research is an extremely valuable way to gather new information and documentation – helping to make your issue strong and credible. It is one way to bring your issue to life and reflect the reality, *in situ*, of how problems are affecting people and the environment.

So much information is now available in published form - and increasingly on the internet - that there can be a temptation to limit research to existing publications, but in doing so researchers are missing a highly valuable source of new information, facts, ideas and opinions.

Local people close to the source of a problem, workers, government employees and others (NGOs, experts etc) can all provide essential information upon which you can base a campaign. Field research can, in many situations, be the best – sometimes the only – way to gather new visual materials (film and photos) that provide evidence of a problem and bring your issue to life.

Planning

Your field research should be well-planned:

- Why do you believe the research to be necessary?
- What information do you want to gather/what are you trying to illustrate?
- How can you use this information and how will it fit into your overall campaign strategy?
- Have you agreed a budget for your field research?
- Have your colleagues and collaborators been consulted and lent their support to your field plans?
- How much time will the field work take and who will do it - remember that it can be very difficult to get exactly the right materials in one or even several field trips. Can you return to the same location or make additional trips to new locations over an extended period of time?

☛ **Be prepared for each trip to raise new ideas, suggestions and locations that you may want to cover in the future. As your strategy unfolds you will probably have to make return trips to gather new information and keep your message up-to-date.**

SECTION 2. VERIFYING AND GATHERING NEW INFORMATION

2.1 Gathering balanced and credible information

Your research should provide a balance between the positive and negative aspects of an issue, for example, community natural resources management versus large-scale, commercial operations. Gather as much information as possible to enable you to compare and contrast the two situations in terms of environmental, social and economic impacts.

Remember that situations are rarely a simple choice between one or the other perspective. For example, community-based resource management may not be without its problems. Be very careful not to ignore real or potential problems that may not fit in with your ideas or proposed solutions – your information should not be unreasonably biased.

You also need to check that your sources of information are not unreasonably biased: people often have personal prejudices and bear grudges against companies, government and individuals that can distort their view of a situation. Unreasonable bias in your published materials will undermine your credibility with your potential supporters, be it government, international agencies, the public and NGOs.

Prove your 'facts'

When presenting your research consider what makes information a 'fact'. How do you really know that an event or problem is occurring. For example, what proof is there that fish species are declining or that a particular company, individual or agency is responsible for this decline?

Check your facts and be able to back them up with credible referenced sources, visual and other evidence.

Interviews (see below) and personal accounts should be verified with more than one source if possible and appropriate. Just because someone tells you something is true, doesn't mean that it is necessarily true or correct.

Before your information is published request colleagues and independent authoritative sources to review it critically and question how you know that your 'facts' are really facts. Try to be objective – what would other people think about your information?

Take time to discuss with colleagues the questions that may be posed to you when your information is published. What additional information would a journalist, a government official, agency staff or other NGOs want to know. How would you convince them that your information is reliable?

☛ **Unreasonable bias in your published materials will undermine your credibility with your potential supporters, be it government, international agencies, the public and NGOs.**

TIP *Check your facts and be able to back them up with credible referenced sources, visual and other evidence.*

2.2 Interviews

Interviews are essential to any authoritative and substantiated report, educational video or video news release (VNR). However, interviewing someone is not a simple process and getting it right can be difficult.

The key to good interviews is knowing what information you are seeking – what added value will your interviews give to your campaign? Be prepared – note down some initial questions and consider the objective of the interview. Who are you meeting and what is it that you want to find out from them? Do you want to talk generally about an issue and note the statements of interest, or do you have a particular question that you want answered?

Think on your feet – you may only have one chance to interview the person and you must carefully listen to and consider their answer. Does it spark another range of issues that you need to pursue?

Think how you can coax more information out of your interviewee and how to deal with negative answers. For example, they may not know who owns a company that is causing problems but have they tried to find out and is there a reason why the information is unavailable?

Conducting interviews

Before beginning your interview, ensure that the interviewee is fully aware of why you are interviewing them and where you will use the information. It is one thing to talk casually to someone about their situation, it is quite another to publish their names and information in a public document or video without their consent.

Make your interviewee feel relaxed and let the conversation flow as naturally as possible – stick with it, a 30 minute filmed interview may have a few seconds or minutes of useful information. But, be clear in your objective, stick to the subject and return to it if necessary. Try not to ask 'leading questions' – the interview should be guided by you – but take care not to put words into your interviewee's mouth – **you want to establish what they think or know, not what they think you may want to hear.**

Most interviews can be recorded using a field notebook but it can be far easier – particularly for lengthy interviews or where you want a visual or audio record – to use a voice recorder or a video camera. Collecting spoken words with visual images is one of the most valuable tools for a researcher. They lend interest and can provide crucial evidence and first-hand accounts of relevant issues. Having a taped interview can be invaluable in refuting contrary claims – they are more valuable than written accounts alone.

Remember that unless you need to protect anonymity, whenever you record an interview you should start by asking the person their name, who they are and where the interview is taking place. You can also say a few words to your camera or tape recorder to note locations, events and other relevant information – your audio or video record can be an invaluable means to personalise the issue and gain publicity and support.

☛ **Immediately after conducting the interview, always check your notes, or film to check you have what you want – this can save time and money!**

☛ **REMEMBER**
Unless you need to protect anonymity, whenever you record an interview you should start by asking the person their name, who they are and where the interview is taking place.

Your Interview Objectives

1. Gathering authoritative information – check your sources:

- Who can you trust? Why do you trust them?

Unless you need to protect their identity, try and establish your interviewee's credentials – why are you interviewing them rather than someone else. Try to include brief details such as:

- How long they have lived or worked in the area?
- What is their position in a company, the government or community?

2. Fact checking – getting other opinions or opposing views.

- Anecdotal information must be checked – try to get back to the original source of information and quote the person who witnessed an event or has first-hand experience of an issue whenever possible and appropriate.

- Follow the chain of information back to the original source if you can. People often state information as 'fact' but figures, places, people and events can all be added to or confused as the information is passed from one to another. People can also be biased in their view of a company, government (or political party) or individual and this can distort your 'fact' gathering.

If you are still unsure of your 'facts' it is acceptable to use the information you gather provided that you qualify it, for example by writing 'according to local people interviewed by us ...'

- Establish how the people you are talking to know who or what is causing the problem? If they allege a company or individual, how do they know – have they seen company vehicles or spoken to workers or seen and recognised the owner of the company – if so, when and where, has anyone else seen the same thing?
- Take visuals to back up claims made – ask to be taken to see where an incident took place or to meet people affected. Is there visual evidence such as company documents to back up the claims made?
- Your facts are more credible if the information you are presenting is common knowledge or if it has been published or reported elsewhere (a newspaper, government document or other).
- Try and be creative in the range of people you talk to, for example, are there government employees, company workers or recognised experts you can talk to in support of (or even opposition to) your research? Knowing the opposing viewpoint can be invaluable but take care that your research is not undermined by the wrong people knowing that you are looking into an issue.

NOTE Remember that if you record or film an interview you need to check the sound before you record and you **MUST** play back the sound and check it before you leave the location. You may not get a second chance to re-record a vital interview.

☛ **Your field notebook must be an accurate record of your observations and interviews. It should be meticulously kept, with dates, titles, names and places all entered accurately (include GPS co-ordinates if this will help). Ensure you get correct spellings of names and place names.**

Examples of questions you may want to ask your interviewee

NB. These are intended for guidance only and interview questions should be devised on a case-by-case basis and subject to already known facts and information.

As well as gaining new information, try to use your interviews to confirm and build on your existing information rather than merely repeat some general facts and figures that you have previously collected.

Local Communities

- What do they do?
- What has been their experience of the situation? What does it mean for them?
- What is the situation today? What are the changes they have seen?
- Have they personally witnessed problems or been subjected to threats or intimidation?
- What will the future hold if nothing is done?
- What do they want to see happen?
- What is the cause of the problem that they see?
- Who is behind it?
- Do they know why it started?

Company employees and other workers

- Where do they work?
- Where do they come from – are they local?
- How long have they been engaged in the activity (logging, fishing, etc)?
- What are the changes over time – why do they think this is happening (is it happening everywhere)?
- Is demand for the product higher or lower than in the past?
- What are they paid for the logs, fish, wildlife etc?
- Who pays them – is it a local company owner or dealer?
- Where are the products going – what are they used for?

Government staff and Experts

- Do they know who or what is causing a problem?
- Is it getting worse – why?
- What can be done about it?
- What is the government (or others) doing or planning to do about it?

ALWAYS ASK YOUR INTERVIEWEE TO SAY THEIR NAME, POSITION AND GIVE A SHORT SUMMARY OF THEIR INVOLVEMENT IN THE ISSUE OR EXPERTISE.

SECTION 3. SAFETY

3.1 Interviewees

Given that some people you want to interview will be concerned about their personal safety, it is vital that you earn their trust and build their confidence. They must know that they can take you into their confidence and talk openly and honestly. You need to reassure them that you will protect their safety and of course, maintain their anonymity if required.

Earning trust can take time – often you will need to prove your interest, credentials and sincerity before people will open up to you and share their experiences.

If you have good information for use in a report but need to protect the source, then writing ‘anonymous personal communication’ is acceptable, but remember that if over-used this will diminish the credibility of your material. Try to find other ways – especially visual evidence – to back-up your information and check whether other supporting information has been published elsewhere, for example in a newspaper, government, scientific or other document.

Given that it is usually very difficult and often dangerous to take photos or other visual evidence of illegal activities – always should consider ways to film the after-effects of such actions. For example, filming a pond that has been pumped dry may be a good substitute to actually filming the pond being pumped, similarly logged forest is a substitute for logging activity. Photos of people or communities who have been affected by illegal or unsustainable activities are also valuable to you.

3.2 Personal safety

All field work can carry risks to the personal safety of the researcher, of those they work with or gather information from (such as communities affected by a problem). When embarking upon field research always consider the potential threat to yourself and others.

At all times stay safe and remember that leaving without the information or visual evidence you want is not as important as leaving unharmed. There are a number of essential points to consider before and during your fieldwork:

- Being prepared mentally is the best means to stay safe. Always think through and discuss with your colleagues all the 'what if' scenarios.
- Before you set off know your own skills and abilities to avoid confrontation – how would you calm a situation if a concession owner, poacher or illegal logger or fisherman were to confront you? Will the people you encounter be a threat or will they help you in your research?
- Always make sure that a colleague knows where you are and when you will return – keep in touch with them and make sure that they know how to get help to you if necessary. Take good advice from those you trust – if you are warned not to pursue something, then don't.
- Try to limit the time you are in any risky area – be very disciplined with your time, have a plan and try not to waste time.
- Trust your instincts – if you feel uncomfortable about a situation then leave as quickly as possible without drawing greater attention to yourself and your activities.
- Do not enter a situation that you cannot win or get away from safely – be aware as to how you can leave the area unharmed and avoid confrontation.
- Constantly review the situation whilst you are in the field – a peaceful situation can turn nasty very quickly.
- Remember that if you are carrying equipment such as cameras, GPS, video camera and tripod then your 'escape' will be more difficult. It is also far harder to avoid gaining attention from those who could pose a potential threat to you.

Set your priorities:- Remember that even the best investigators using the best equipment cannot always gain the documentation that is needed, not least because being in the 'right place' at the 'right time' is often down to luck. The number one priority must be to leave an area safely and to avoid future threat or intimidation.

Do not be put off if you cannot gain all the visual material you want as there may be other sources of this or similar material that will serve as a second-best option. There are also ways in which you can encourage others to accompany you or undertake their own research. For example, staff from international agencies (such as the World Bank and FAO) and donor agencies will sometimes undertake research, for example, if they are looking into funding a field programme related to the issue. Foreign and national journalists may also be interested in pursuing your issue and can often assume a greater degree of anonymity than local field researchers can.

SECTION 4. YOUR FIELD RESEARCH CHECKLIST

- ✓What purpose is the research being gathered for?
- ✓Have you planned what information you want to gather, where you will go and who you will meet?
- ✓Have you agreed a budget and allocated time to do the work?
Have you got the support and permission of your colleagues?
- ✓Have you got the equipment you may need such as camera or GPS receiver?
- ✓Have you compiled a 'shotlist' of the visual images you need and the potential interviews you want to gather, together with an outline of the questions you want to answer?
- ✓Have you done as much fact-checking as you can?
- ✓Are you and your colleagues safe?