

**FRAMKWORK  
PARTNERS INC.**

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**That's A Good Survey**

## That's a Good Question.....

The old adage, "Think before you speak" also applies to the process of survey design. Here's a list of things to think about before you write that next survey. Whether the delivery is telephone based, web-based or a mail survey, these tips should make for a better survey and an easier time for both you and the respondents, and will produce better research.

- **Ask unaided questions first.** Sometimes the survey telegraphs the kind of information you're after, which can direct the respondent towards a biased answer. A very simple example would be asking whether the person recalls the names of any brands in a particular category after having mentioned some brand names in a previous section of the survey. This seems like an obvious thing to avoid, but it is done quite often.

A spin on this is asking about brand awareness, and then launching into a section on advertising recall. Opinions are likely to be affected by the context and the order in which they are garnered. Do not spend 15 minutes asking questions about politics and then expect an unbiased answer to something like, "To what degree are you interested in politics?"

- **Be clear and specific.** Avoid questions that are ambiguous or difficult to interpret. For example, if 35% of your respondents disagree with the statement "The government has a plan to reduce the deficit and is ready to implement it" are they disagreeing with the existence of the plan or the willingness to implement it?
- **Keep it short.** We prefer to limit telephone surveys to 20 to 25 minutes. Too long a survey leads to respondent fatigue and boredom, not to mention anger. Hang-ups, break-offs and added expense are the price you'll pay. Also, giving the respondent a bad time now will mean lack of co-operation in the future: a good prospect for research is lost forever. Keep in mind that door-to-door and mail surveys can also be too long and thus self-defeating.

Every question requires an extremely compelling reason to be added to the survey. If a question is added simply because the information would be nice to know, eliminate it from the survey. Long surveys drive up project costs, easily doubling data collection costs in telephone surveys.

- **Vary your methodology.** When choosing the best method of data collection, consider the characteristics of the study population and avoid always using the same method. Can the population be reached more easily by phone or by mail? Is data needed quickly? For example, if you are studying active, outdoor subjects, they may not be available by phone.
- **Vary scaled questions.** Scaled questions should always be balanced with as many negative points as positive. On telephone surveys, avoid scales with more than five points, because respondents cannot remember the names of each point.
- **It takes more than one person to design a survey.** Outline the survey subject first, then work in a group of two or more to design the questions. One person working alone at a computer cannot produce the rich questions that two or more creative individuals who can cooperate.
- **Limit the number of open-ended responses.** They are time-consuming for the respondent. They also cost more to code and process.
- **Confidential means confidential.** Always respect the confidentiality or the anonymity of the respondent if promised. "Confidential" means you know the respondent's identity but won't reveal it. "Anonymous" means you do not know the identity of the respondent. If anonymous, follow-ups must be sent to all study participants, not just to those who fail to respond.
- **Pick your words carefully.** Avoid loaded questions, offensive or potentially offensive words and sexist language. Avoid buzzwords and jargon peculiar to your industry. Words should have just one meaning. Avoid emotional words, such as socialize and activism (Hint: these often end in ize, acy, ism.) Test the survey on individuals outside your organization to make sure the language is neutral.
- **Use nontraditional ways to structure questions on the survey.** The information you seek on the survey should be like a wolf in sheep's clothing: simple in appearance, but sophisticated. This means that items on the survey should be developed strategically. For example: instead of using the traditional rating scale for measuring importance of product features, ask respondents to divide 100 points

among all of the features, reflecting importance levels.

- **Mix it up.** Mix up the response formats on items you ask respondents to complete. A survey that consists of all agree/disagree statements is like watching the same program on TV for five nights in a row. It is a sedative. Although there is no research on this, it is likely that surveys with the same types of response formats throughout get placed aside on the "to do" pile more often than those with variety built in. The respondent gets bored and puts off completion until later, which never comes.
- **Give clear directions.** Surveys should have specific sets of directions for each group or section of items. Do not assume that respondents know what you want them to do. Be clear in stating directions. There is nothing more aggravating than getting through half of a survey and being confused in the middle. Now you want to toss the survey out even though you have wasted some of your time.
- **How it looks is important.** Pay attention to visual appearances of surveys. How many times do we receive surveys where the appearance gets an "F" in Communications 101? Surveys that are black on white with no shading are difficult for the eye to follow. The same goes for using italics throughout a survey; save it for wedding invitations. Type that is too small to read without a magnifying glass reflects poor judgment all of the time, not just when you are surveying an aging population.

Important decisions such as putting boxes around groups of questions; using dark ink (preferably black) on light stock; shading multiple-response questions in the layout; selecting clean, clear typeface; having a short, attractive cover letter; and using lines to take the respondent's eye from question to response make a difference in whether the respondent will respond.

- **Make sure that changes to the survey maintain a logical flow.** If you add or remove a question, go through the skip patterns again. These are points where respondents are directed to a different point in the survey depending upon their answers.
- **Use consistent vocabulary.** You can run into confusion over what you mean in a given question if more than one terminology is used to refer to the same thing. For example, if you ask respondents to rate

various forms of entertainment, specifying in your options such activities as "preferring movies or plays." don't in the follow-up question ask them to elaborate on their preference for "going to the theatre." Clearly, there would be some confusion over whether "theatre" refers to live theatre or a movie theatre.

- **Give the interviewer clear instructions and visual cues.** Plain and simple directions to guide the interviewers through the survey are a must. They don't have time to read long instructions between each question. Also, the more complex the skip patterns, the greater the risk of interviewer error.
- **Give it the "read aloud" test.** Read each question aloud, preferably to a colleague. If your tongue trips on something, chances are your interviewers will have a tough time too.
- **Don't make assumptions about respondents.** On a very basic level, do not assume they have heard about a certain fact. Establishing a respondent's knowledge of a topic before asking more detailed questions will allow you to take awareness into account in your analysis.
- **Don't ask questions that you would here trouble answering yourself.** Check each question to see whether it should be clarified or simplified. Will the question result in too detailed an answer? Is the information so personal or compromising to respondents that they might avoid a direct answer? Does the question demand an elephant-like memory? Would anybody really know, for example, how much chewing gum or soda pop they've bought in a year?
- **Don't ask leading questions.** Make sure respondents understand that all of the answers they give are okay. When you make an assumption or imply a bias in the question, it becomes difficult for people to give an unbiased opinion. It's better to ask "How often, if at all, do you go to the movies?" It's always good to give the respondent an out: people don't want to appear ignorant or unaware of things.
- **Remember who your respondent is.** The respondent base should dictate wording, tone and structure. I've seen a survey that required residential natural-gas customers to differentiate between heating system vent dampers that were electronically versus thermally operated. Had the respondents been heating and air-conditioning

professionals, this would have been acceptable: however most residential customers would not understand such a technical question.

- **Eliminate irrelevant questions.** In the process of assessing response choices, you may also find that a question is less important or even irrelevant. For example, in the aforementioned school district survey, parents whose children were bused were asked: "Is your child's bus clean?"

The only option was to answer "yes" or "no." Most parents probably have little first-hand experience other than to observe the outside condition of the bus or maybe the steps leading into the bus. One wonders how many responded to the question. Unless the exterior condition of the bus is of concern, this question should be removed to make room for other, more relevant issues. Prioritizing questions is imperative to keeping a survey concise and motivating respondents to complete the task.

- **Remember the logical little things.** A survey distributed at a baseball park asked that all responses be filled out with a #2 pencil, but pencils were not provided. How many spectators just happen to bring a #2 pencil to the ballpark? Cooperation is hard enough to obtain without presenting such obstacles.
- **Pretest the Survey.** All the rewriting and editing in the world won't guarantee success. However pretesting is the least expensive way to make sure your survey research project is a success. The primary purpose of a pretest is to make certain that the survey gives the respondent clear understandable questions that will evoke clear understandable answers. Pretesting will also help:
  - ☑ Uncover question sequence problems;
  - ☑ Locate areas where respondents may terminate;
  - ☑ Eliminate and/or add questions;
  - ☑ Determine any recording difficulties;
  - ☑ Refine closed-end categories;
  - ☑ Time the length of the interview;
  - ☑ Improve wording;
  - ☑ Determine clarity of each issue; and
  - ☑ Convert open-ends to checklists, if possible.

- **Don't use a photocopy of someone else's survey.** Survey design should follow the unique objectives of the study. Even if Vendor X has done hundreds of patient satisfaction studies, Hospital A should require the company to design its survey from scratch rather than using an off-the-shelf format. This is necessary because Hospital A may be studying competitive issues, while Hospital B may be learning how new products and technologies at the hospital affect patient satisfaction. Vendor X may try to shortcut by developing a standardized survey that it sells to as many hospitals as possible to obtain economies of scale in surveying and processing data.
- **Sample surveying.** In the long run it may be more economical to draw a small sample and work harder to obtain a high response rate than to over-sample and obtain a low response rate. Generally a sample of 300 to 400 subjects is adequate and by increasing the pre-letters and follow-up activities, an 80% to 90% response rate may be achieved. In contrast, a larger sample of 1,200 subjects with little follow-up may produce only a 10% to 20% response rate. The cost per completed survey is a better measure of expenses than the cost of reaching each population member once but failing to obtain 90% response rate. The cost of sending out a huge number of unreturned mail surveys and the cost of telephoning a huge sample two or three times do not accurately reflect the value of obtaining a high response rate. A higher response rate pays for itself in reducing non-response error.

Just as a small blood sample can give us an accurate assessment of the patient's health, a small random sample of the target population can similarly produce an accurate analysis of that population's characteristics. And the more homogenous the population the lower the margin of sampling error.

- **Keep it organized.** Number all sections, and number all items in each section. When the respondent sees that section one has items one through five, he or she is more likely to do all five. It is easy for the eye to miss a question because it is not numbered. For example, if you present the questions like this, you might get that important clarification you need:
  - ☑ Has our company improved, stayed the same or declined?
  - ☑ How?

- **Remember respondent constraints.** We have come across numerous situations where the design of orally presented surveys does not consider respondents' limited ability to remember what is said. For example, this long-winded question was posed in a phone interview:

"When thinking of how you and other executives at your level in your company make business-related decisions; and using a scale of strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree or strongly disagree; to what extent would there be agreement with each of the following statements... "

A more respondent-friendly approach would be to present each aspect separately. This can be done in a number of ways. One is to first tell the respondent what they will be doing: "I am going to read a series of statements. For each statement, I would like to know how much you agree or disagree with it."

An option would be to present the rating scale here (or wait until the first statement is presented): "You can strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each statement."

Then follow up with what the respondent should consider: "As you consider each statement, please think about how you and other executives at your level in your company make business-related decisions."

The first statement would be read to the respondent followed by the five possible response choices. While potentially a bit more time consuming, this procedure presents the question in a logical, relaxed, and easy-to-understand manner that eliminates overload.

In this same executive phone interview, respondents received a survey outline in advance of the interview. While this is not an option in every phone interview, it can come in handy. For example, when executives rank ordered five statements, they could refer to the survey outline rather than having to remember the statements in their head. For the benefit of those who could not find their outline, they were asked to write the five statements on a piece of paper.

In any lengthy telephone or in-person survey, it is important to make an oral transition from one type of question or subject area to another. This will help respondents anticipate a change and shift them into a new mindset. In the executive phone interview, when the respondent is finished assigning levels of agreement on the statements, a simple remark like: "Now. I would like to have you *rank* a series of statements..." would provide a nice transition to the next task (notice the emphasis on the word "rank" which highlights the action to take place).

Remember that you are writing for a particular audience and purpose, and for placement next to other questions. As you prepare a survey, fill in the blanks to the five simple questions below:

1. Have you asked the right question?  
What do you want to know?  
How will you use the answer?
2. Are respondents going to understand the question?
3. Are respondents going to know the answer?
4. Are respondents willing and able to answer?
5. What do the answers mean?

Answering these questions will help ensure that your survey is effective.

For more information about surveys or for a copy of our article about writing effective survey questions please visit our website at [www.framework-partners.com](http://www.framework-partners.com)