

Design tips for surveys 2012

Caroline Jarrett

User Interface Engineering / Rosenfeld Media Seminar

We need lots of data.
Your samples are too small.
We're going to do a survey.



But, but... er, er, ...
OK, you're the boss



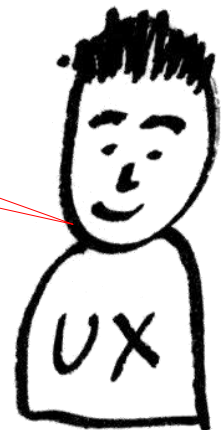
Please make it one that
I'll enjoy answering



We need surveys in our toolbox

1. You get lots of lovely numbers
2. It's much easier to manage what you can measure
3. They're going to do a survey anyway, so let's make it a good one

And the more of them I do, the more I like them



Survey = Questionnaire + Process

Agenda

Entice people to take a survey

Get users to engage with questions

Break: seminar Q & A

Get users to answer accurately

Find insight for your stakeholders

Bonus tip

Wrap up: seminar Q & A

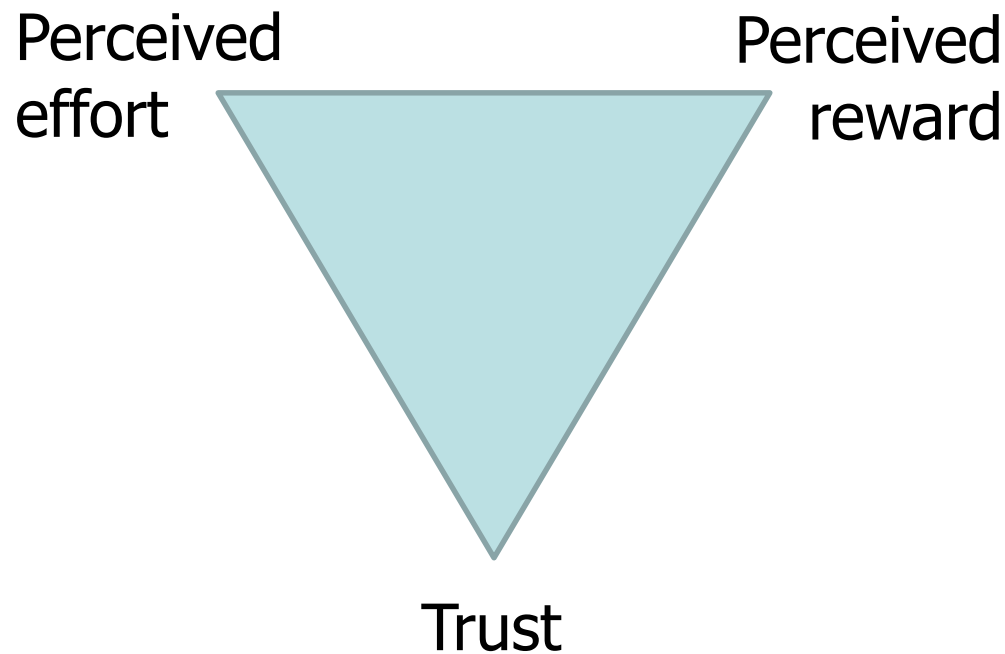


Your answers to this survey are important for my business.

But what's in it for me?
And I'm really busy today.



Response relies on effort, reward, and trust



Reward, trust and effort for this invitation



The central graphic is a blue circle with a gradient. Inside the circle, the text reads: "YOUR OPINION MATTERS." in large, bold, white capital letters. Below this is the "opinion-central" logo in blue, with a small signal icon above the word "central". Underneath the logo is the text "TAKE A SHORT SURVEY AND MAKE YOURSELF HEARD" in white capital letters. At the bottom of the circle are two buttons: a yellow one that says "YES, I'LL PARTICIPATE" and a smaller blue one that says "NO THANKS".

Three red arrows point from external text blocks to the central graphic:

- An arrow points from the top right text block to the top of the circle.
- An arrow points from the bottom left text block to the bottom left of the circle.
- An arrow points from the bottom right text block to the bottom right of the circle.

Intrinsic reward
- but is it enough?

Short is good,
but do I trust
you enough to
believe you?

Who are you?
Will you spam me?

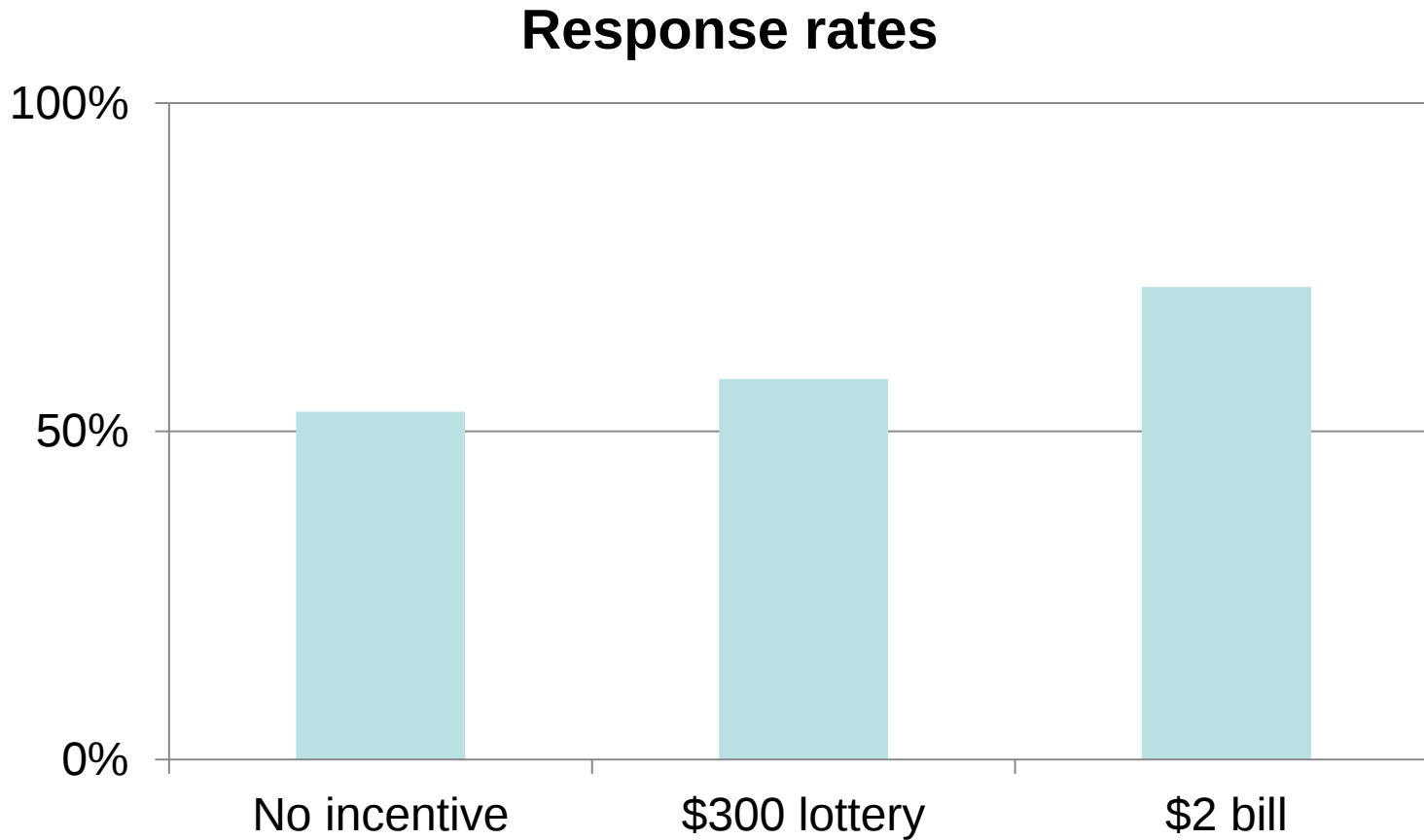


We'll offer a chance to win \$100.
That will get lots of responses.

But I don't believe
I'll be the winner



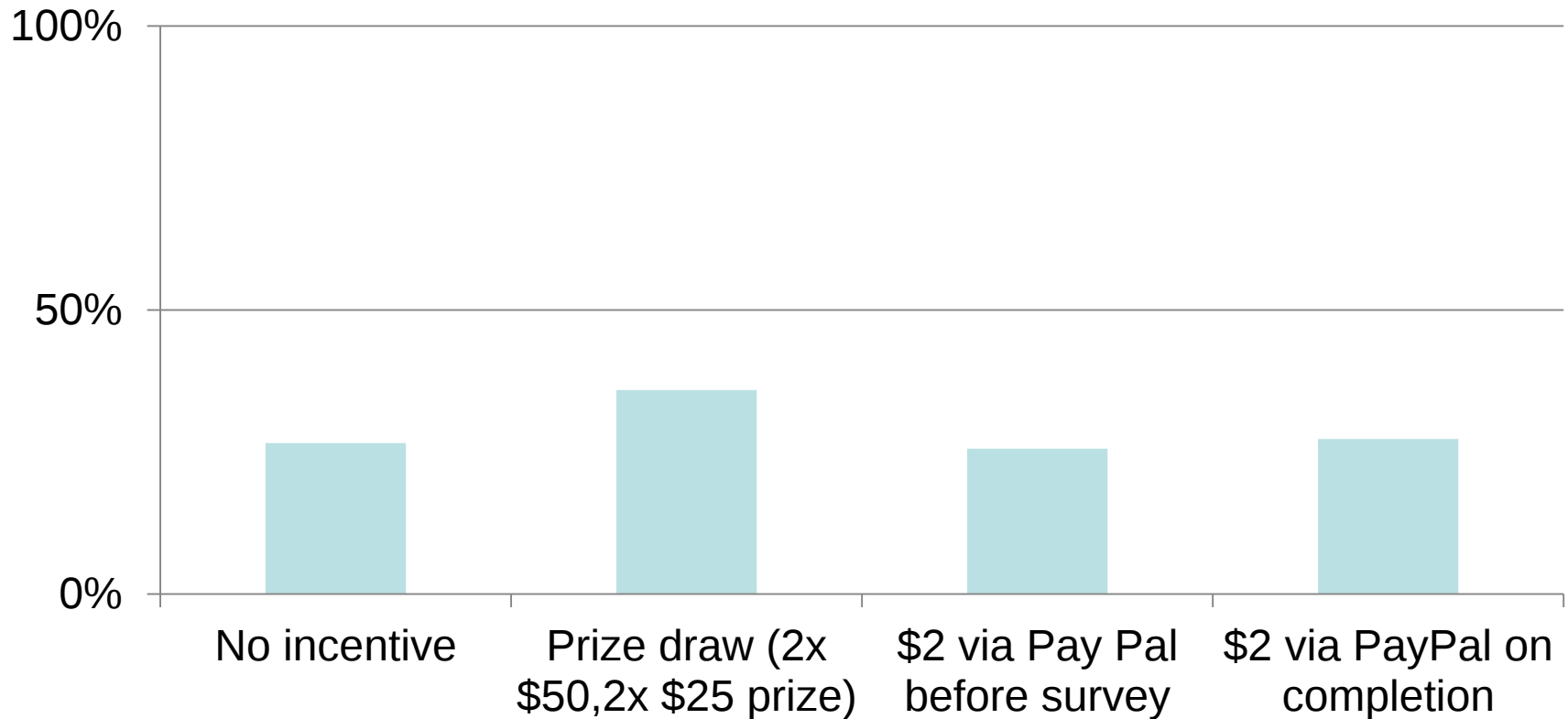
A small immediate payment works best for mail



Carlson, 1996 quoted in Dillman, D.A., Smyth, J. D. and Christian, L. M. (2009)
"Internet, Mail and Mixed Mode Surveys: The Tailored Design Method"

'Small immediate payment' is difficult online

Accessed first page



Tip 1

Offer a meaningful,
immediate reward



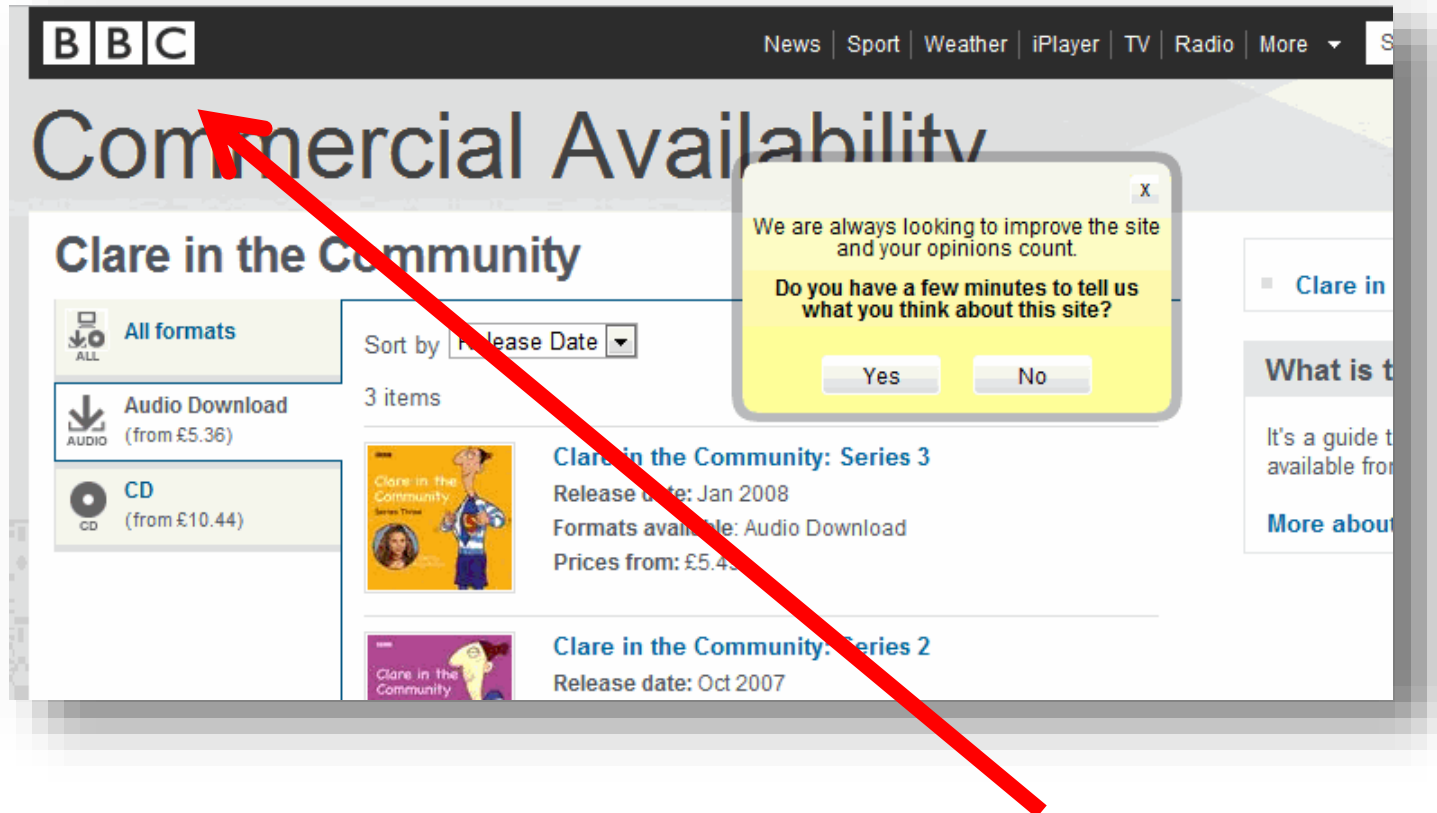
Picture credit: 12
Flickr -
Jessica Wilson (jek in the box)

Let's look again at trust



Who are you?
Will you spam me?

A well-known brand on a well-designed site



I definitely know you
And you won't spam me

Tip 2

Be trustworthy and look trustworthy



Stanford Web Credibility Research

Part of the [Stanford Persuasive Technology Lab](#)

www.webcredibility.org

Stanford Guidelines for Web Credibility

How can you boost your web site's credibility?

We have compiled 10 guidelines for building the credibility of a web site. These guidelines are based on three years of research that included over 4,500 people.

Guideline	Additional Comments	Supporting Research from our lab
1. Make it easy to verify the accuracy of the information on your site.	You can build web site credibility by providing third-party support (citations, references, source material) for information you present, especially if you link to this evidence. Even if people don't follow these links, you've shown confidence in your material.	chi00 , chi01a , ptl02 , unp 15
2. Show that there's a real organization behind your	Showing that your web site is for a legitimate organization will boost the site's credibility. The easiest way to do this	chi00 , chi01a , chi01b , ptl02



You know that survey? I want to know where they live

I really need the 'recommend to a friend' question

We have to ask them about navigation, obviously

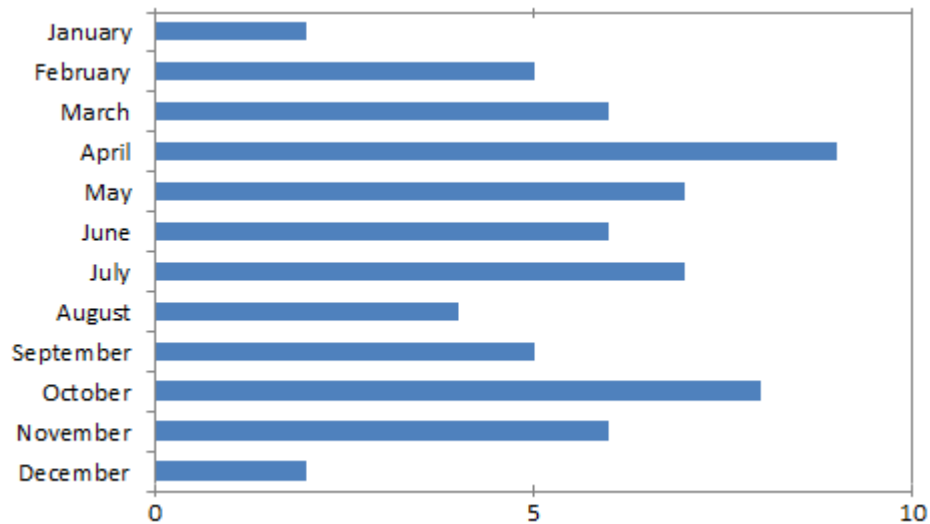
What about the new graphics?

We have to ask about the content!

And finding us ... we have to know about that

Don't forget about the new feature

I respond to a lot of surveys

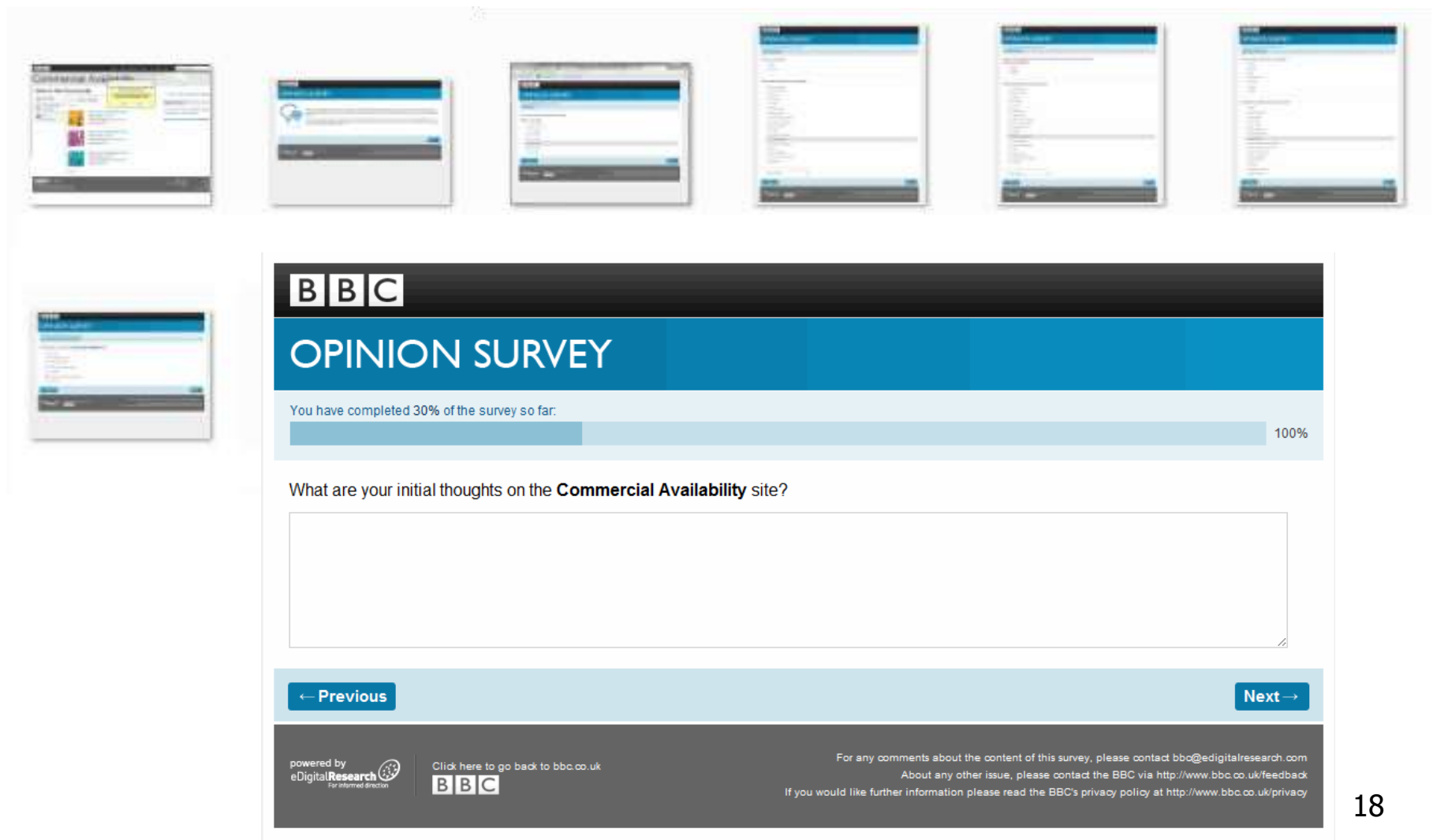


89 invitations

67 completed surveys

1387 questions

They wanted my opinions but it took 6 screens to get to the first opinion question



Could the BBC trim some of these?

- Gender
- Region you live in
- Ethnic origin
- Type of Internet connection
- Rate how it looks
- What do you like about it
- What do you dislike about it
- Your main reason for visiting the site today
- And many more



Tip 3

Focus on the questions that deliver the insights that you need the most



Image credit: Fraser Smith

Remember 1387 questions?

This survey contributed 30 of them

John Lewis

Home Survey

0%

100%



Have you browsed (either online at www.johnlewis.com / using your mobile / in a John Lewis store / from a John Lewis catalogue) any of the following 'Home' categories in the last 12 months?

- ☐ Furniture
- ☐ Linens (e.g. bedding and bath linen)
- ☐ Soft furnishings (e.g. fabrics, blinds, curtains, cushions etc)
- ☐ Lighting
- ☐ Kitchenware (e.g. Cookware, tableware, glassware, silverware)
- ☐ Rugs, carpets and flooring
- ☐ Home accessories (e.g. pictures, photoframes, mirrors, ornaments)
- ☐ Home decorating (e.g. paint, wallpaper)
- ☐ Home Storage
- ☐ Other home products (excluding electricals)
- ☐ None of these

On and on

Home Survey

0%

100%



Which of the following John Lewis publications / brochures are you aware of (regardless of whether you have read them, we would just like to know if you are aware of them)?

☐ Home Catalogue



☐ Online buying guides



☐ None of these

← Previous

Continue →

On and on and on and on and on and on



What is the main reason you do not / have not read the Online buying guides?

- ☐ Just not interested
- ☐ I'm not looking to purchase anything
- ☐ Don't like the products
- ☐ Products too expensive
- ☐ Not sure how to obtain a copy
- ☐ Didn't contain the information I wanted
- ☐ Didn't show a wide range of products
- ☐ Other (please specify)

I love John Lewis!
I shop there online and offline!
Don't make me feel bad because
I didn't read your buying guide.
Just let me tell you I love you...

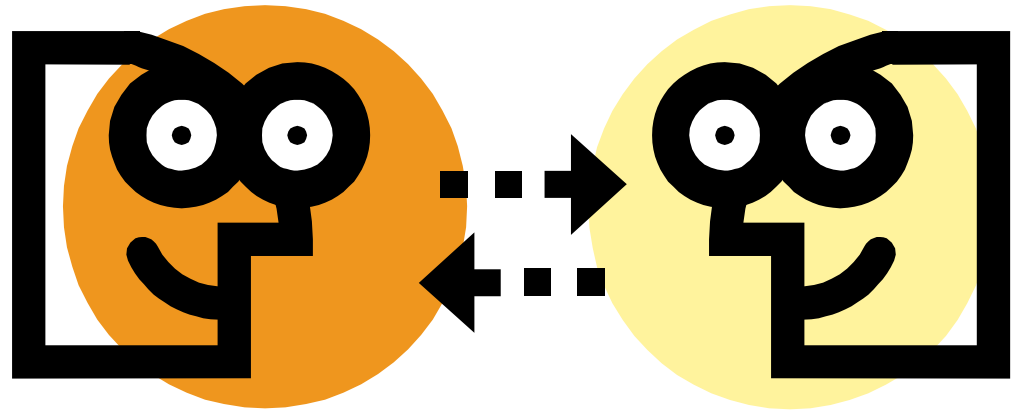


Your users may not be as interested in your design decisions as you are.



Tip 4

To get a good survey, talk to lots of users



Agenda

Entice people to take a survey

Get users to engage with questions

Break: seminar Q & A

Get users to answer accurately

Find insight for your stakeholders

Bonus tip

Wrap up: seminar Q & A

Back to the BBC. After I gave my initial opinions, they asked me some ratings

BBC

OPINION SURVEY

You have completed 35% of the survey so far:

100%

Could you please rate the **Commercial Availability** site with a mark out of 10, where 10 is the highest score?

1

2

3

4

5

6

7

8

9

10

Don't know

Would you recommend the **Commercial Availability** site to a friend or colleague? Please give a mark out of 10, where 1 indicates 'Strongly Disagree' and 10 indicates 'Strongly Agree'.

1

2

3

4

5

6

7

8

9

10

Don't know

← Previous

Next →

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BBC

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Most surveys I see have ratings from 1 to 5

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	Not Applicable
	5	4	3	2	1	
Overall, I was satisfied with my experience in Hayward Dining Room	☐	☐	☐	☐	☐	☐

Wouldn't it be easier to have just two ?

	True	False
I usually get what I want in life.	☐	☐
I need to be kept informed about news events.	☐	☐

7 points are more accurate!

	Completely satisfied	Very satisfied	Quite satisfied	Neither satisfied nor dissatisfied	Quite dissatisfied	Very dissatisfied	Completely dissatisfied
Your outward journey with easyJet	☐	☐	☐	☐	☐	☐	☐
Your whole experience with easyJet on this latest occasion	☐	☐	☐	☐	☐	☐	☐

What about 1 to 10?

1: *Please rate how well the site is organized.

1=Poor									Excellent=10	
1	2	3	4	5	6	7	8	9	10	Don't Know
☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☒

Likert had several different types of question in his scales

13. How much military training should we have?

- (a) We need universal compulsory military training. (1)
- (b) We need Citizens Military Training Camps and Reserve Officers Training Corps, but not universal military training. (2)
- (c) We need some facilities for training reserve officers but not as much as at present. (3)
- (d) We need only such military training as is required to maintain our regular army. (4)
- (e) All military training should be abolished. (5)

17. The United States, whether a member or not, should co-operate fully in the humanitarian and economic programs of the League of Nations.

Strongly Approve (5)	Approve (4)	Undecided (3)	Disapprove (2)	Strongly Disapprove (1)
----------------------------	----------------	------------------	-------------------	-------------------------------

You can find an academic paper to support almost any number of points in a range

- Krosnick and Presser refer to ~87 papers on ranges
 - Krosnick, J. A. and S. Presser (2009). Question and Questionnaire Design. Handbook of Survey Research (2nd Edition) J. D. Wright and P. V. Marsden, Elsevier
- If you'd like to track down the research yourself:
[http://comm.stanford.edu/faculty/krosnick/
Handbook%20of%20Survey%20Research.pdf](http://comm.stanford.edu/faculty/krosnick/Handbook%20of%20Survey%20Research.pdf)

Users don't care much about the number of points. They care more about the questions.

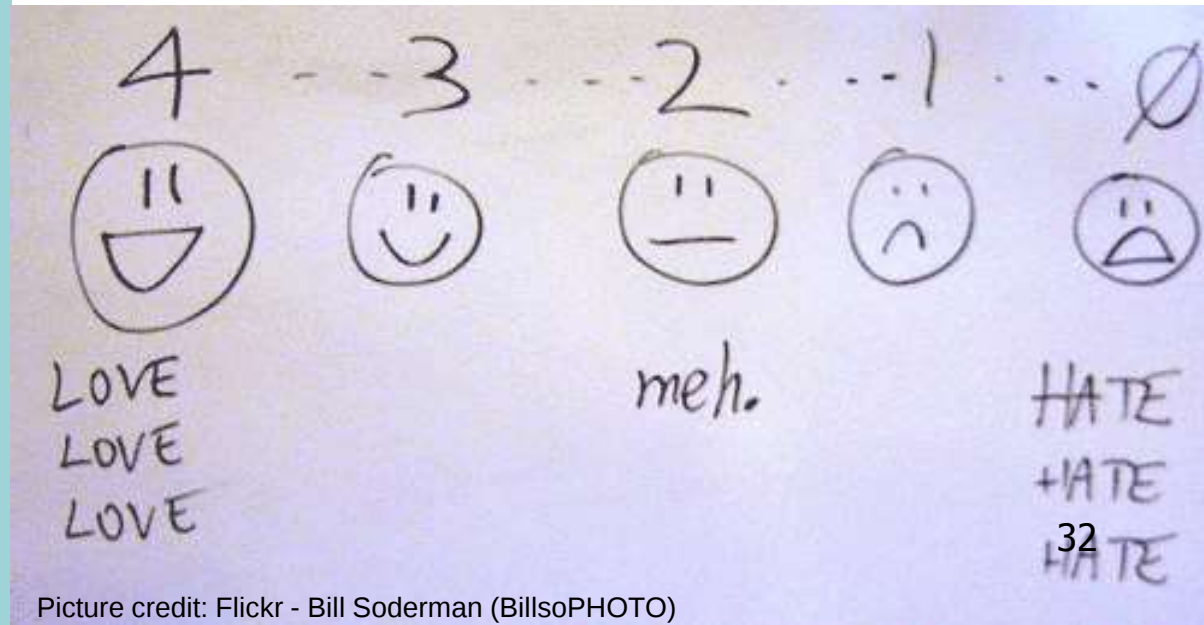
	Complete satisfied
Your outward journey with easyJet	☐
Your whole experience with easyJet on this latest occasion	☐

What's the difference
between those questions?
This survey is too repetitive.



Tip 5

Don't stress about the number of points in your rating scale



The BBC didn't stress about the number of points in the rating scale. This one has 10

BBC

OPINION SURVEY

You have completed 35% of the survey so far:

100%

Could you please rate the **Commercial Availability** site with a mark out of 10, where 10 is the highest score?

1

2

3

4

5

6

7

8

9

10

Don't know

Would you recommend the **Commercial Availability** site to a friend or colleague? Please give a mark out of 10, where 1 indicates 'Strongly Disagree' and 10 indicates 'Strongly Agree'.

1

2

3

4

5

6

7

8

9

10

Don't know

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This one has 5. And I never noticed at the time.

BBC

OPINION SURVEY

You have completed 74% of the survey so far.

100%

How far would you agree or disagree with the following statements?

Please rate on a scale of 1-5, where 1=disagree and 5=agree.

	Disagree				Agree	
	1	2	3	4	5	Don't know
The Commercial Availability service looks easy to use to select products and find suppliers	☐	☐	☐	☐	☐	☐
I trust the BBC to list only established retailers who meet certain minimum requirements	☐	☐	☐	☐	☐	☐

← Previous

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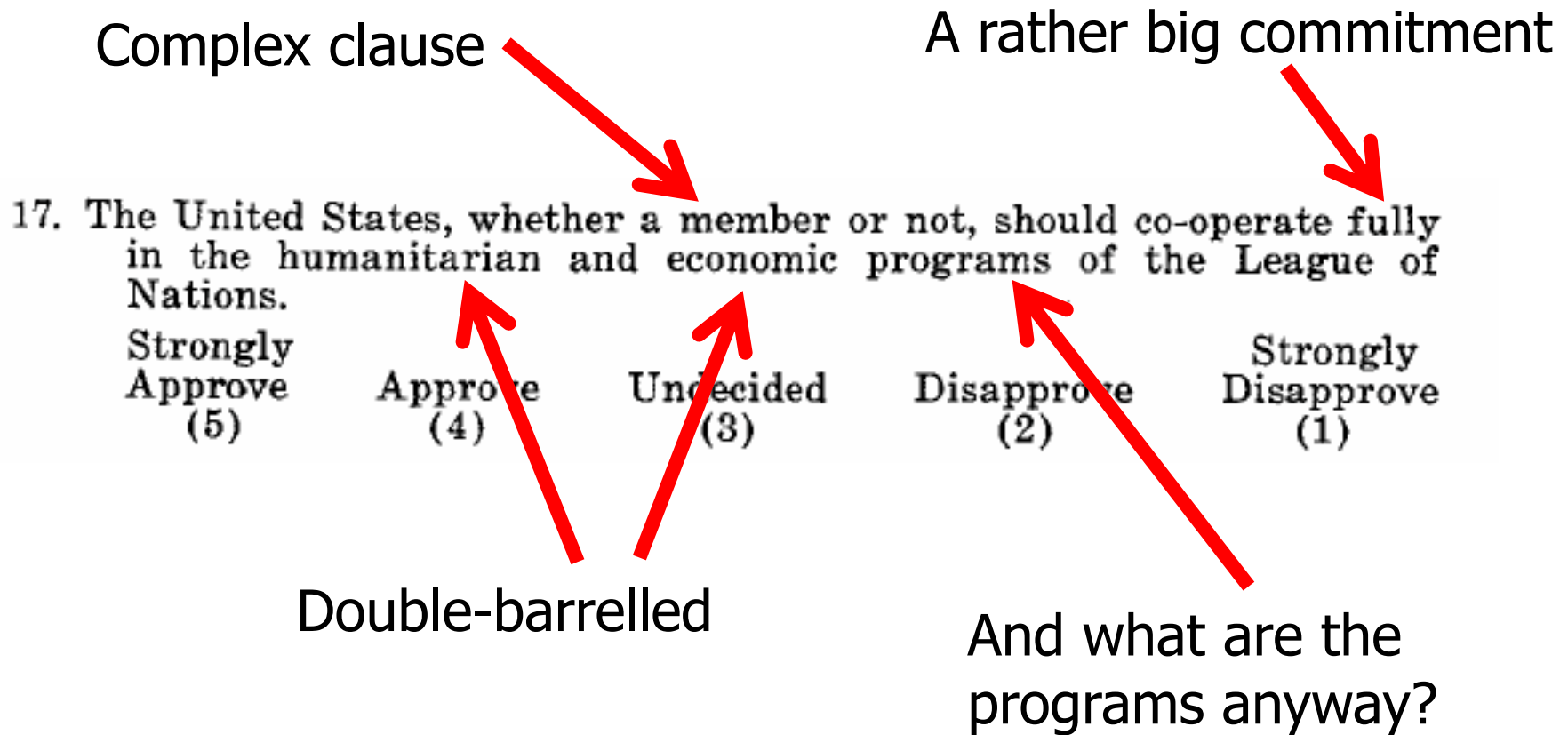
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Let's have another look at one of Likert's questions



Before- and after- for Likert's question?

17. The United States, ~~whether a member or not~~, should co-operate ~~fully~~
in the humanitarian ~~and economic programs~~ of the League of
Nations.

Strongly
Approve
(5)

Approve
(4)

Undecided
(3)

Disapprove
(2)

Strongly
Disapprove
(1)

17a. The United States should join in the humanitarian work of the League of Nations

17b. The United States should join in the economic work of the League of Nations

The BBC also asked me a complex question

How far would you agree or disagree with the following statements?

Please rate on a scale of 1-5, where 1=disagree and 5=agree.

Disagree

1

2

The Commercial Availability service looks easy to use to select products and find suppliers



Let's split it and simplify it

How far would you agree or disagree with the following statements?

Please rate on a scale of 1-5, where 1=disagree and 5=agree.

	Disagree	
	1	2
The Commercial Availability service looks easy to use to select products and find suppliers	☐	☐
	☐	☐

It is easy to select products on this service

It is easy to find suppliers on this service

Tip 6

Refine questions so
they're crystal clear

Present one question at a time

Use plain language

<http://www.plainlanguage.gov/howto/index.cfm>



How much do you care about the economic programs of the League of Nations?

17. The United States, whether a member or not, should co-operate fully in the humanitarian and economic programs of the League of Nations.
- | | | | | |
|----------------------------|----------------|------------------|-------------------|-------------------------------|
| Strongly
Approve
(5) | Approve
(4) | Undecided
(3) | Disapprove
(2) | Strongly
Disapprove
(1) |
|----------------------------|----------------|------------------|-------------------|-------------------------------|

OK, so how much do you care about...

How did you arrive at the website today?

- ☐ Typed the URL into a browser
- ☐ Bookmark / favorites
- ☐ Search engine result
- ☐ Clicked on an advertisement
- ☐ From a link on a blog, forum or social network
- ☐ From a link on another site
- ☐ From an e-mail link
- ☐ From a link sent to me by a friend
- ☐ Other

How often do you tend to visit the following...?

Internet (in general)

Several times a day About once a day

☐ ☐

Please rate the overall information content on the website?

	Very poor	Poor	Neither poor nor good
Ease of understanding	☐	☐	☐
Layout and presentation	☐	☐	☐
Usefulness	☐	☐	☐
Quality / accuracy	☐	☐	☐
Ease of finding information	☐	☐	☐
Breadth of information	☐	☐	☐
Information content <u>overall</u>	☐	☐	☐

Two ways of asking the same question: One of them calls for imagination

What is your favourite meal?

- Steak and chips

Imagine you are on death row and have to choose your last meal

- Scallops with black pudding and cream, rib eye steak with chips and a dolce latte cream sauce; stinking bishop (cheese) with 1960 port (year of my birth). Wine would have to be Chateau Lafite 1st Cru Pauillac 2000.

Could we make the question more interesting?

Please rate the overall
information content
on this web site

Boring

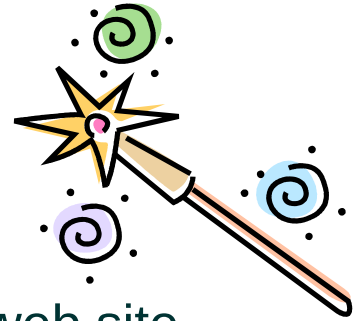


Could we make the question more interesting?

Please rate the overall
information content
on this web site

Story:

If you could wave a
magic wand and
make a new page for this web site,
what would it do or say?



Game:

You've asked us to improve the
information content on this web site.
Here are some different changes we
thought of and what they would cost. If
you had \$10,000 to spend, which
would you choose?

Cambridgeshire police tried the game idea



Creating a safer
Cambridgeshire



How would you spend Your Police Budget...



Cambridgeshire
Police
Authority

[HOME](#) [FAQ](#) [HELP](#)

You have allocated £0m

How to Play

Below are six key areas of policing activity. For each activity there are four different levels of service that each cost a different amount of money.

Your task is to choose the level of service you think is right for each policing activity, but remember that your total budget must be around £100m and you must allocate funding to each of the activity areas. The bar on the top right hand side of the page tracks how you are doing.

Activity and Level of Service

Cost (£m)

Responding to 999 and non-emergency calls for service



- ☒ **No funds allocated**
- ☐ Officers respond to incidents only where there is an imminent danger to life and well-being
- ☐ Officers will not routinely attend minor incidents and the police response in other circumstances will sometimes be delayed
- ☐ Sometimes there may be a delayed response to some antisocial behaviour and minor crime incidents
- ☐ Sufficient resources to respond to all reported incidents in a timely fashion

£0m
£32m
£36m
£40m
£44m

Investigating 'volume crime' such as burglary, vehicle crime and violence



- ☒ **No funds allocated**
- ☐ Crime scenes are not routinely attended by officers or Crime Scene Investigators
- ☐ All crimes are recorded, but there is limited capacity to attend and investigate scenes of crime
- ☐ All crimes are recorded and, for priority crimes, the investigation is supported by a small number of specialist teams of detectives
- ☐ Thorough investigation of all reported crimes with support from specialist investigation teams

£0m
£16m
£20m
£24m
45m

Local officers patrolling your neighbourhood

Tip 7

Write interesting questions



Agenda

Entice people to take your survey

Get users to engage with questions

Break: seminar Q & A

Get users to answer accurately

Find insight for your stakeholders

Bonus tip

Wrap up: seminar Q & A

Does your household have access to running water?



“Shared reference”: both sides interpret in the same way



Reiss, E. (2000) “Practical Information Architecture:
A Hands-On Approach to Structuring Successful Web Sites”

“Shared reference”: both sides interpret in the same way

Please note: mandatory questions have a * next to them

Q1. How did you find out about the website? *

Other:

Q2. In the last 6 months, approximately how many times have you visited this website? *

Q3. What was the main service area that you were interested in today? *

Other:

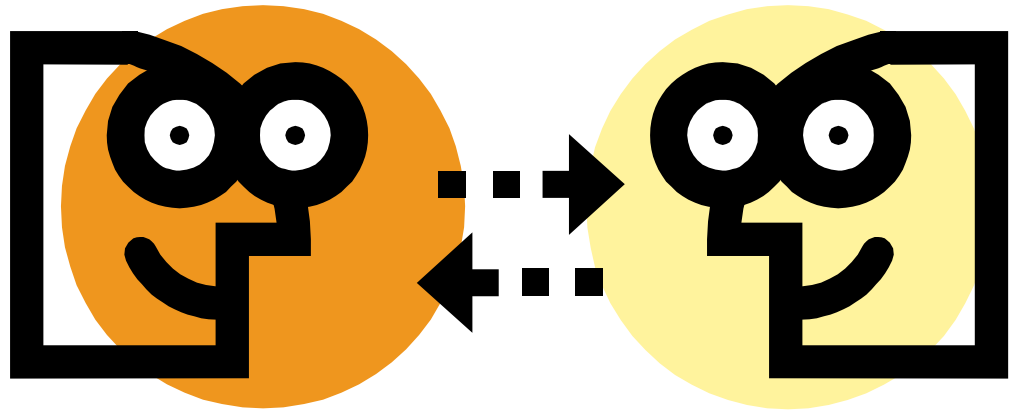


Service area?



Tip 8

Make sure that your users understand your questions in the same way that you do



Let's look at putting the answer on the page.

BBC

OPINION SURVEY

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100%

How far would you agree or disagree with the following statements?

Please rate on a scale of 1-5, where 1=disagree and 5=agree.

	Disagree				Agree	
	1	2	3	4	5	Don't know
The Commercial Availability service looks easy to use to select products and find suppliers	☐	☐	☐	☐	☐	☐
I trust the BBC to list only established retailers who meet certain minimum requirements	☐	☐	☐	☐	☐	☐

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Here, the 'agree' and 'disagree' have floated

BBC

OPINION SURVEY

You have completed 78% of the survey so far:

100%

Currently the BBC provides the Commercial Availability guide for only some programmes.

Would you like the guide to show commercially available material relating to all the programmes the BBC broadcasts?

Please rate how far you agree or disagree on a scale of 1-5, where 1=disagree and 5=agree.

Disagree

1

2

3

4

5

Agree

Don't know

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Not hard to fix.

(And let's delete excess instructions while we're about it.)

BBC

OPINION SURVEY

You have completed 78% of the survey so far:

100%

Currently the BBC provides the Commercial Availability guide for only some programmes.

Would you like the guide to show commercially available material relating to all the programmes the BBC broadcasts?

Disagree

1

2

3

4

5

Agree

Don't know

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Tip 9

Design the page so people can answer easily

<http://www.slideshare.net/cjforms/labels-and-buttons-on-forms>



Labels and buttons on forms

and other time-consuming forms controversies

Agenda

Entice people to take your survey

Get users to engage with questions

Break: seminar Q & A

Get users to answer accurately

Find insight for your stakeholders

Bonus tip

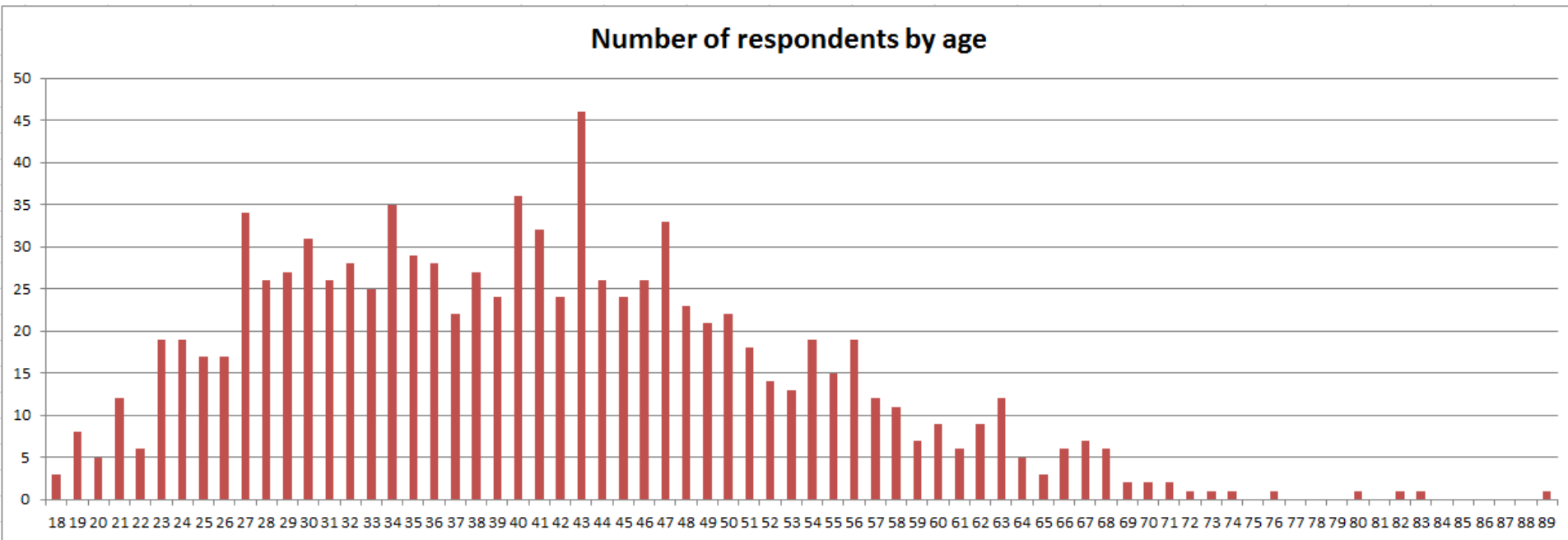
Wrap up: seminar Q & A

We got so much great data
that I put every detail in
this report

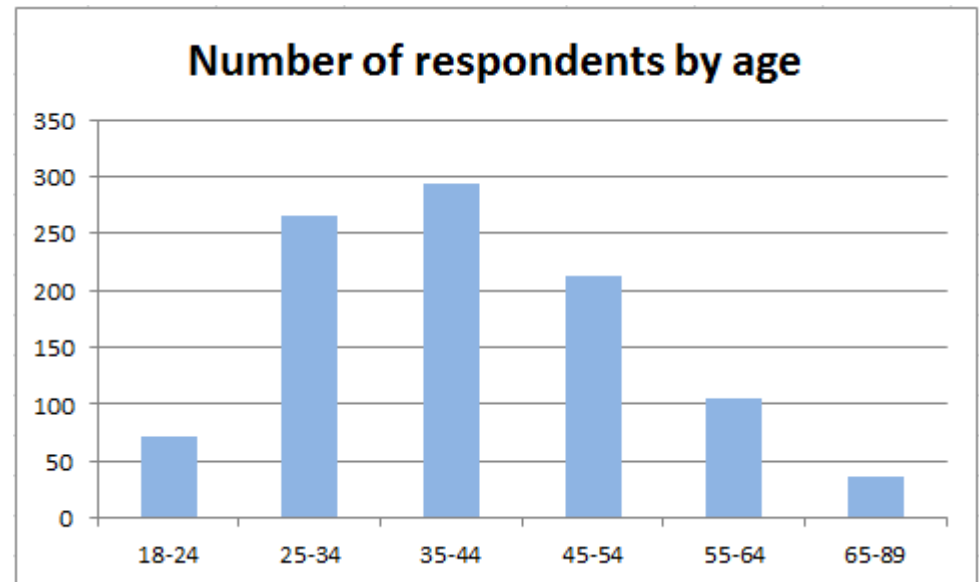


!!!!

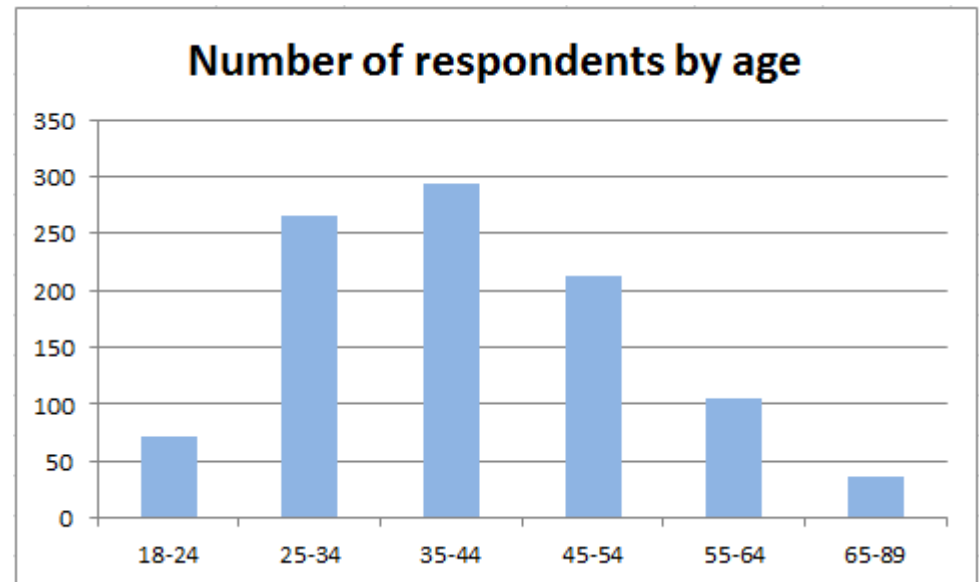
Surveys can get you lots of lovely data



Cutting out some detail can help a lot

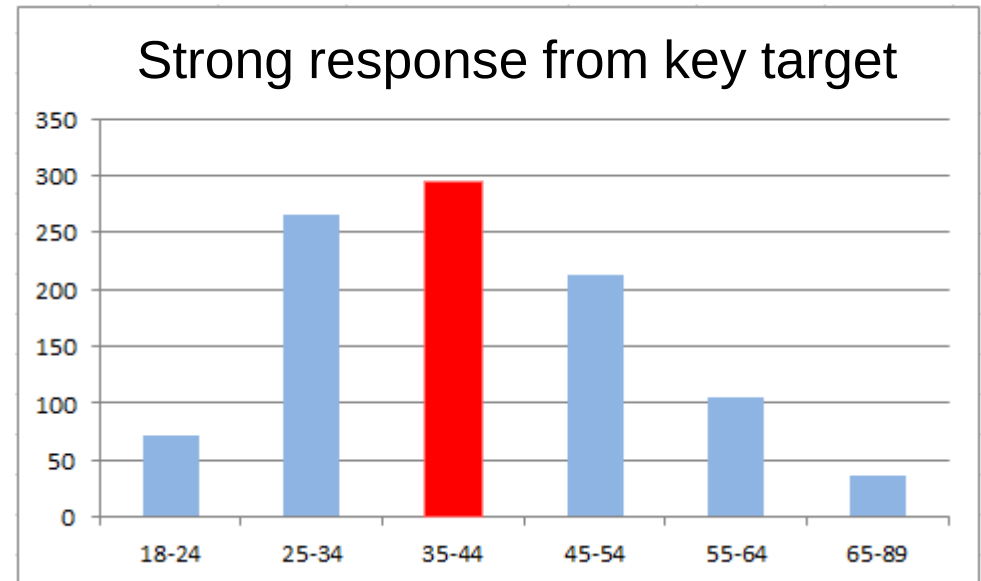


This graph could be good news or bad news depending on the question we ask of it



This graph could be good news or bad news depending on the question we ask of it

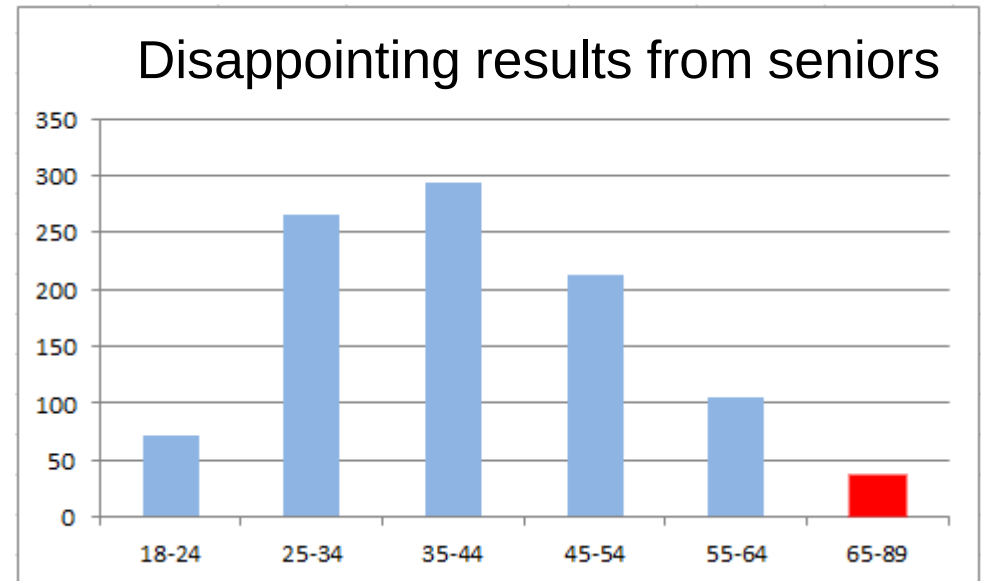
How are we doing in the 35-44 age group?



This graph could be good news or bad news depending on the question we ask of it



How are we doing with the seniors?



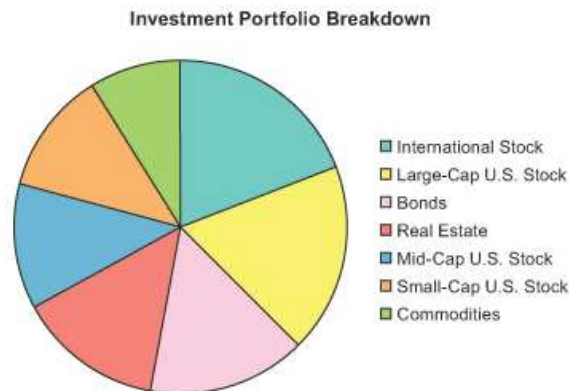
Tip 10

Think about the story the data can tell

Perceptual Edge has a Graph Design IQ test:

<http://www.perceptualedge.com/files/GraphDesignIQ.html>

Question 1: Which graph makes it easier to determine whether Mid-Cap U.S. Stock or Small-Cap U.S. Stock has the greater share? (Click one of the two buttons below the graphs.)



☐ Pie Chart



☐ Bar Graph

My best ever survey was very simple: needed data, got it, made decision



Hello, **Caroline Jarrett**
[Create a poll](#) | [My polls](#) | [Sign out](#)

POLL URL:

POLL

RESULTS

WRITE A COMMENT



@[cjforms](#): Writing my next UXmatters column: choice of two topics. Which one would you rather read?



- ☐ What is a confidence interval & why would I want one?
- ☐ How to usability test a survey
- ☐ other

Leave a comment (optional):



Caroline Jarrett

☒ Retweet this poll

vote

“Quality doesn’t matter”

We are focusing our time on technicalities of research, whereas the expectation from clients is actually in a totally different space.

The clients are saying, ‘Inspire me, help me to take some transformational action’

Stan Sthanunathan

Vice President

Marketing Strategy & Insights

The Coca-Cola Company



“Research”, Oct 2009 <http://www.research-live.com/4001230.article>

Image credit: http://www.eltiempo.com/gente/ARTICULO-WEB-NEW_NOTA_INTERIOR-9736789.html

Insight = information that provokes action

*If information doesn't change our,
or our consumers', behavior
then we shouldn't be doing it.*

Danny Russell,
Marketing Strategy Director,
BSkyB



Tip 11

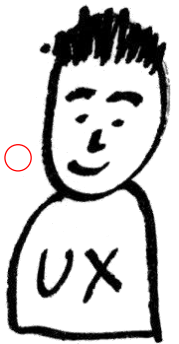
Know what decision you'll make based on this survey



We need to know our
satisfaction score



Hmm... satisfaction has many aspects.
Let's ask about aesthetics, desirability,
navigation....



Good news! We're rating 5 for aesthetics, 5 for desirability and 5 for navigation!



But what about satisfaction?



Tip 12

Know “The Most Crucial Question” and don’t forget to ask it



Image credit:
Shutterstock

Agenda

Entice people to take your survey

Get users to engage with questions

Break: seminar Q & A

Get users to answer accurately

Find insight for your stakeholders

Bonus tip

Wrap up: seminar Q & A



Remember my definition?

Survey = Questionnaire
+ Process

Bonus

Tip

A successful

Survey = Questionnaire

+ **Process**

involves lots of testing

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Slides: <http://www.slideshare.net/cjforms>

Blog posts and more resources:

<http://www.rosenfeldmedia.com/books/survey-design/>

