

# Six crucial survey concepts

that UX professionals need to know

Workshop at UXPA 2014 led by Caroline Jarrett

# Today's concepts

## Better survey questions

Warm up: the SUS

- 1: Ask questions that people can answer
- 2: Satisfaction is a slippery topic

## Better survey processes

- 3: Assess the total survey error
- 4: Understand who responds
5. Your survey goals drive your analysis
6. Test everything

# Today's challenge

## Better survey questions

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1: Tourangeau, Rips, Rasinski (2000)

2: Oliver (2010)

## Better survey processes

3: Groves (many references)

4: Stoop (2005)

5. Saldaña (2013)

6: Couper (2008)

# Introductions

## (I'm Caroline Jarrett - @cjforms)

Work with your neighbour

- Your name and role
- A random thing about yourself



# The SUS is the most-used questionnaire for post-task satisfaction

- John Brooke created the System Usability Scale (SUS) in 1986
- Used after a usability test
- It has been shown to be valid and reliable
- You get a score between 0 and 100
- You can compare your SUS score with other systems

Brooke, J. (1996). SUS: A "quick and dirty" usability scale. In *Usability Evaluation in Industry*. P. W. Jordan, B. Thomas, B. A. Weerdmeester and A. L. McClelland. London:, Taylor and Francis.

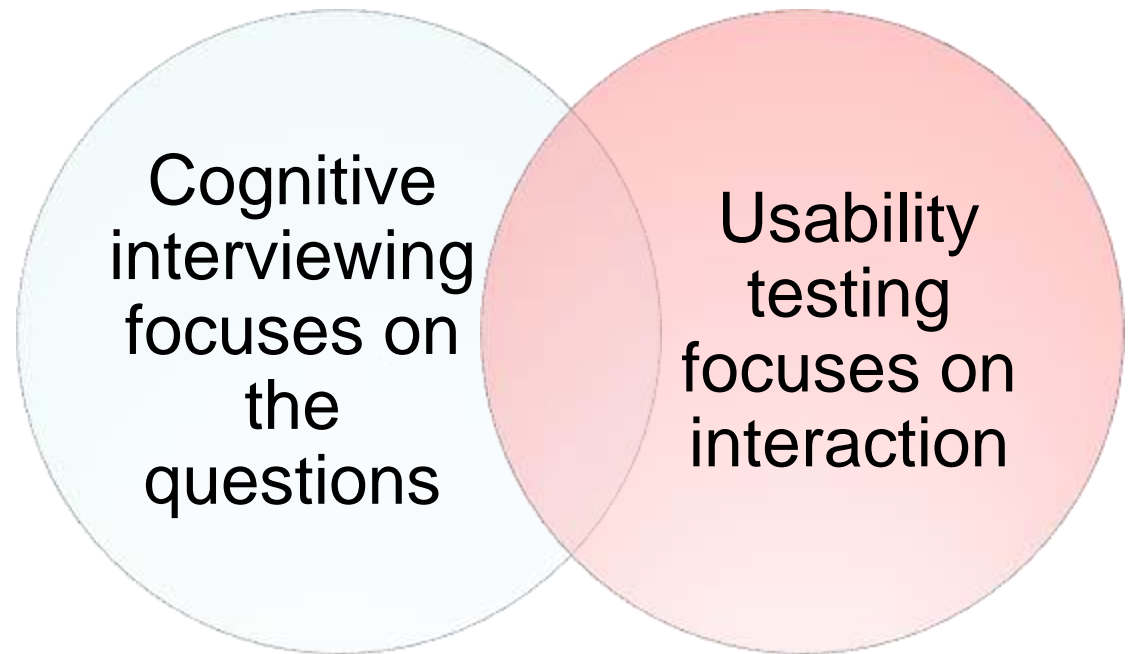
## System Usability Scale

© Digital Equipment Corporation, 1986.

	Strongly disagree								Strongly agree
1. I think that I would like to use this system frequently	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	1	2	3	4	5				
2. I found the system unnecessarily complex	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	1	2	3	4	5				
3. I thought the system was easy to use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	1	2	3	4	5				
4. I think that I would need the support of a technical person to be able to use this system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	1	2	3	4	5				
5. I found the various functions in this system were well integrated	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	1	2	3	4	5				
6. I thought there was too much inconsistency in this system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	1	2	3	4	5				
7. I would imagine that most people would learn to use this system very quickly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	1	2	3	4	5				
8. I found the system very cumbersome to use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	1	2	3	4	5				
9. I felt very confident using the system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	1	2	3	4	5				
10. I needed to learn a lot of things before I could get going with this system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	1	2	3	4	5				

# We'll try cognitive interviewing

- In a cognitive interview, you ask your respondent to explain the mental processes in answering the question



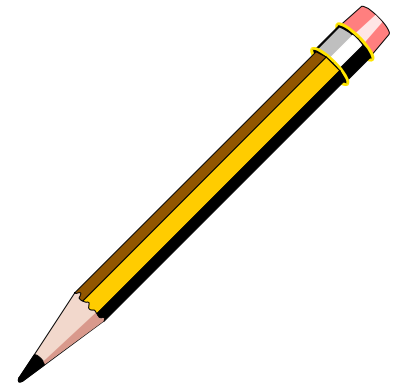
# Collect an experience

- Silent two minute task:
  - Find an **explanation** of the difference between the European Commission and the European Union
  - Use this site: <http://ec.europa.eu>
- Decide whether you had a good or bad experience



# Try some cognitive interviewing

- I'll assign the roles of 'interviewer' and 'respondent'
- Interviewer:
  - Ask your respondent to fill out the **first three questions** of the SUS with the EU task in mind
  - Take notes about any challenges in the questions on the SUS
- Respondent:
  - Please fill out the **first three questions** of the SUS, explaining your thought processes for each question





# Relating our findings from the cognitive interview to today's concepts

Concepts	What we learned from SUS
Ask questions that people can answer	
Satisfaction is a slippery topic	
Assess the total survey error	
Understand who responds	
Your survey goals drive your analysis	
Test everything	

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# There are four steps to answer a question

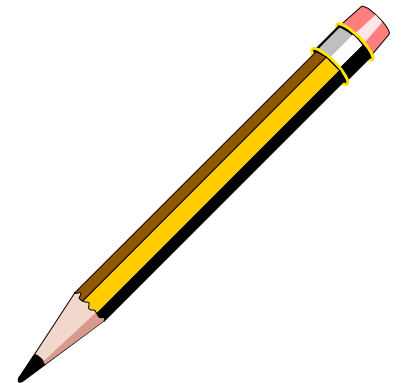
Step	
1. Read and understand	
2. Find an answer	
3. Judge the answer	
4. Place the answer	

# There are four steps to answer a question

Step	A good question ...
1. Read and understand	is legible and makes sense
2. Find an answer	asks for answers that we know
3. Judge the answer	asks for answers we're happy to reveal
4. Place the answer	offers appropriate spaces for the answers

# Use the four steps

- Swap roles and try the remaining SUS questions
- Think about the four steps of answering a question
  1. Read and understand
  2. Find the answer
  3. Judge the answer
  4. Place the answer
- Identify any problems in the questions according to the four steps



# Four step examples:

## 1: read and understand

**Are you...?**

*Please select one response only.*



Next

# Four step examples:

## 1: read and understand

**Sometimes we look for people who work in particular industries. Do you work in any of the following?**

*Please select all that apply.*

<input type="checkbox"/> Automotive	<input type="checkbox"/> Banking
<input type="checkbox"/> Education	<input type="checkbox"/> Health Care
<input type="checkbox"/> Journalism	<input type="checkbox"/> Market Research
<input type="checkbox"/> Marketing / PR / Advertising	<input type="checkbox"/> Not for Profit / Charity
<input type="checkbox"/> Retail	<input type="checkbox"/> Science
<input type="radio"/> None of the above	

Next



# Four step examples:

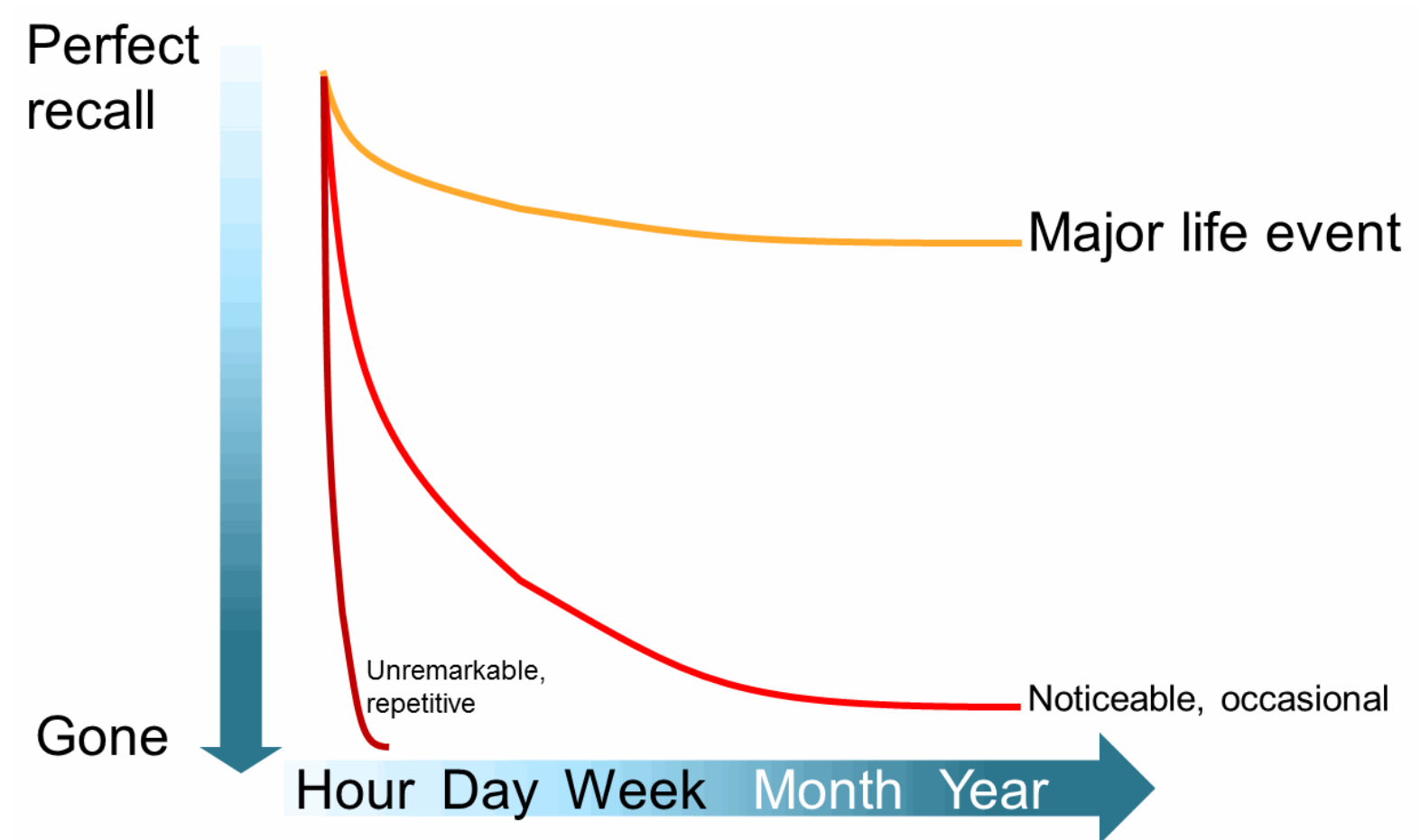
## 2: find the answer

### Question 25

In your **last five days at work**, what percentage of your work time do you estimate that you spent using publicly-available online services (not including email, instant messaging, and search) to do your work using a work computer or other device?


In your last five days at work, what percentage of your work time do you estimate that you spend using publicly-available online services (not including email, instant messaging and search) to do your work using a work computer or other device?

# The approximate curve of forgetting



# Four step examples:

## 3: judge the answer

**\* 11. I think it is safe to challenge the way thing are done in **

- ☐ Strongly agree
- ☐ Agree
- ☐ Neither
- ☐ Disagree
- ☐ Strongly disagree

# Four step examples:

## 4: place the answer

**Where do you currently live?**

*Please make a selection on the map.*



Now for something a bit different...we want to know what you think of the different charity fundrai words would you most closely associate with each of the following events?

*Please drag each statement or picture to each category that applies.*

BORING

CLEVER

CONSERVATIVE

FUN

GENERIC

IMAGINATIVE

IMPORTANT

INSPIRING

MOVING



**Please indicate to which occupational group the Chief Income Earner in your household belongs, or which group fits best.**

**This could be you: the Chief Income Earner is the person in your household with the largest income.**

**If the Chief Income Earner is retired and has an occupational pension please answer for their most recent occupation.**

**If the Chief Income Earner is not in paid employment but has been out of work for less than 6 months, please answer for their most recent occupation.**

- ☐ Semi or unskilled manual work  
(e.g. Manual workers, all apprentices to be skilled trades, Caretaker, Park keeper, non-HGV driver, shop assistant)
- ☐ Skilled manual worker  
(e.g. Skilled Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV driver, AA patrolman, pub/bar worker, etc)
- ☐ Supervisory or clerical/ junior managerial/ professional/ administrative  
(e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc)
- ☐ Intermediate managerial/ professional/ administrative  
(e.g. Newly qualified (under 3 years) doctor, Solicitor, Board director small organisation, middle manager in large organisation, principal officer in civil service/local government)
- ☐ Higher managerial/ professional/ administrative  
(e.g. Established doctor, Solicitor, Board Director in a large organisation (200+ employees, top level civil servant/public service employee))
- ☐ Student
- ☐ Casual worker - not in permanent employment
- ☐ Housewife/ Homemaker
- ☐ Retired and living on state pension
- ☐ Unemployed or not working due to long-term sickness
- ☐ Full-time carer of other household member
- ☐ Other

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# My journey into user experience started a long time ago, with usability

The extent to which **a product** can be used by specified **users** to achieve specified **goals** with effectiveness, efficiency and satisfaction in a specified **context of use** (ISO 9241:11 1998)





# In government, we were interested in effectiveness and efficiency

The extent to which a product can be used by specified users to achieve specified goals with **effectiveness, efficiency** and satisfaction in a specified context of use (ISO 9241:11 1998)



# But what about user experience?

## What about satisfaction?

The extent to which a product can be used by specified users to achieve specified goals with effectiveness, efficiency and **satisfaction** in a specified context of use (ISO 9241:11 1998)



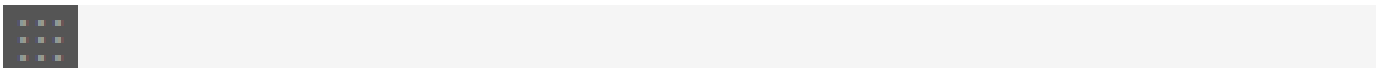
# How are we doing?

Our mission is simple – we're here to provide first-class service while helping people start, run and grow their own ventures. Please fill out the survey below based on your most recent customer support interaction.

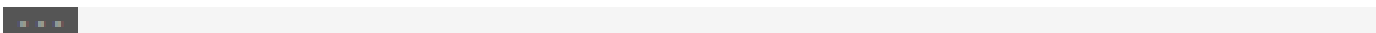
\* required

## Recent Experience

Please rate your satisfaction with your customer service representative.\*

	Very Dissatisfied	Neutral				Very Satisfied					
											
Please Select	0	1	2	3	4	5	6	7	8	9	10

How likely are you to recommend us to a friend?\*

Not At All	Neutral				Extremely Likely
					

# Satisfaction is a complex matter

Compared experience to what?	Resulting thoughts
(nothing)	Indifference
Expectations	Better / worse / different
Needs	Met / not met / mixture
Excellence (the ideal product)	Good / poor quality (or 'good enough')
Fairness	Treated equitably / inequitably
Events that might have been	Vindication / regret

# Example: bronze medal winners tend to be happier than silver medal winners

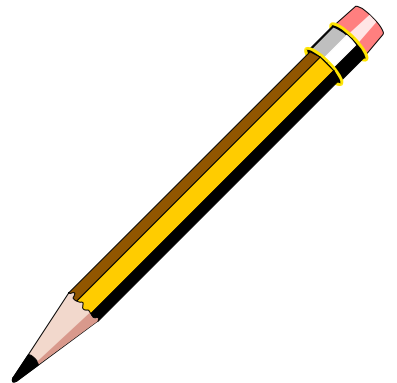


Nathan Twaddle, Olympic Bronze Medal Winner in Beijing

Matsumoto D, & Willingham B (2006). The thrill of victory and the agony of defeat: spontaneous expressions of medal winners of the 2004 Athens Olympic Games.

# I showed you a survey from GoDaddy

- The first question was about rating satisfaction
- What were they asking us to rate?
  - Just a guess from what you recall



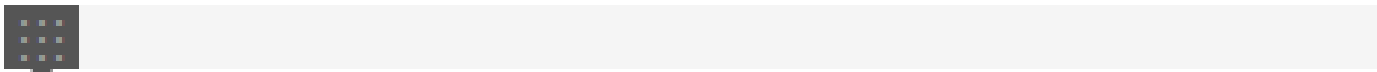
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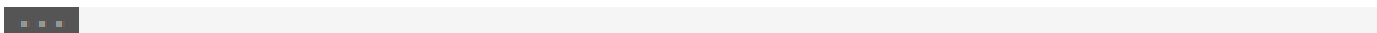
\* required

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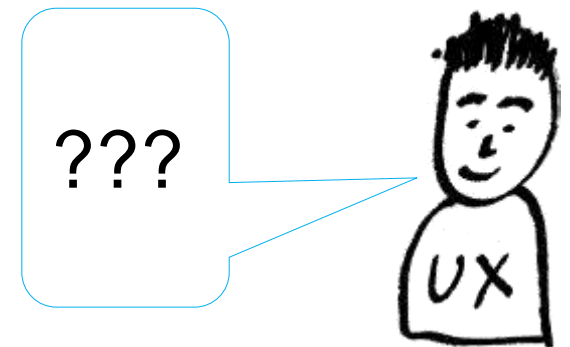
	Very Dissatisfied	Neutral						Very Satisfied			
											
Please Select	0	1	2	3	4	5	6	7	8	9	10

How likely are you to recommend us to a friend?\*

Not At All	Neutral				Extremely Likely
					

# The challenge of UX and surveys: which bit to measure?

The extent to which a **product**  
can be used by specified **users**  
to achieve specified **goals** with  
**effectiveness**, **efficiency** and  
**satisfaction**  
in a **specified context of use**  
(ISO 9241:11 1998)





# Some ideas about what we could measure (as well as satisfaction)

In the definition	GoDaddy customer support	GoDaddy as a provider of domain names
Product	This contact with help desk	Overall experience of moving a domain to GoDaddy
Users	What proportion of customers contact support	Demographics (example: type of job)
Goals	Reason for contacting help	Reason for looking at GoDaddy
Effectiveness	Whether support fixed the problem	Whether GoDaddy offers the right products
Efficiency	Whether it took a reasonable time	Whether the product is priced correctly
Satisfaction	Helpfulness of support person	Likely to purchase again / recommend
Context of use	Home/office; alone/helped	Business / personal

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# Tip

Find out about users' goals



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Web

**Images**

Videos

News

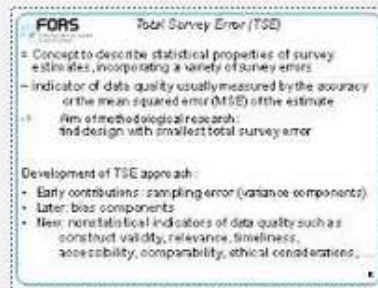
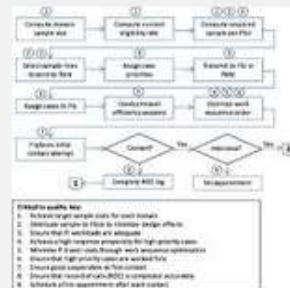
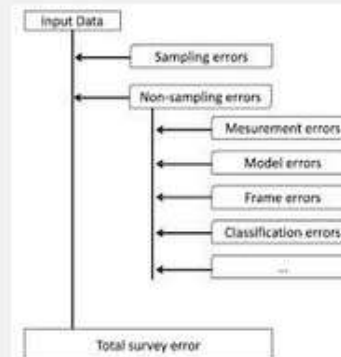
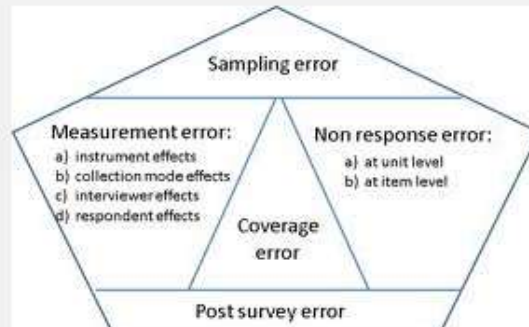
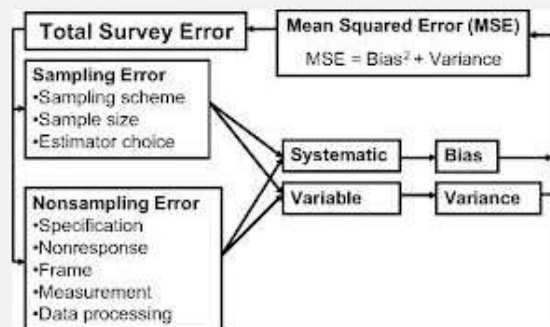
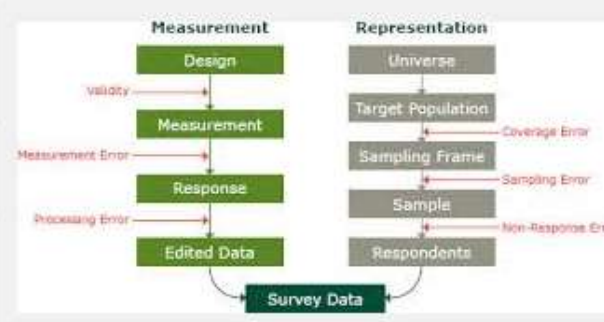
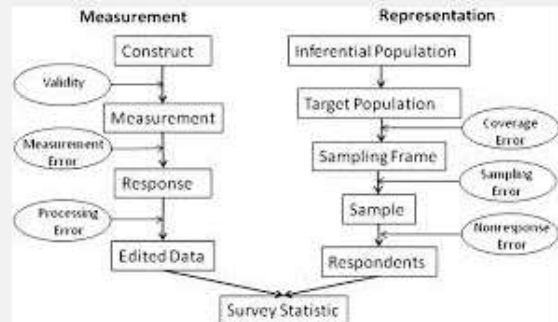
Maps

More ▾

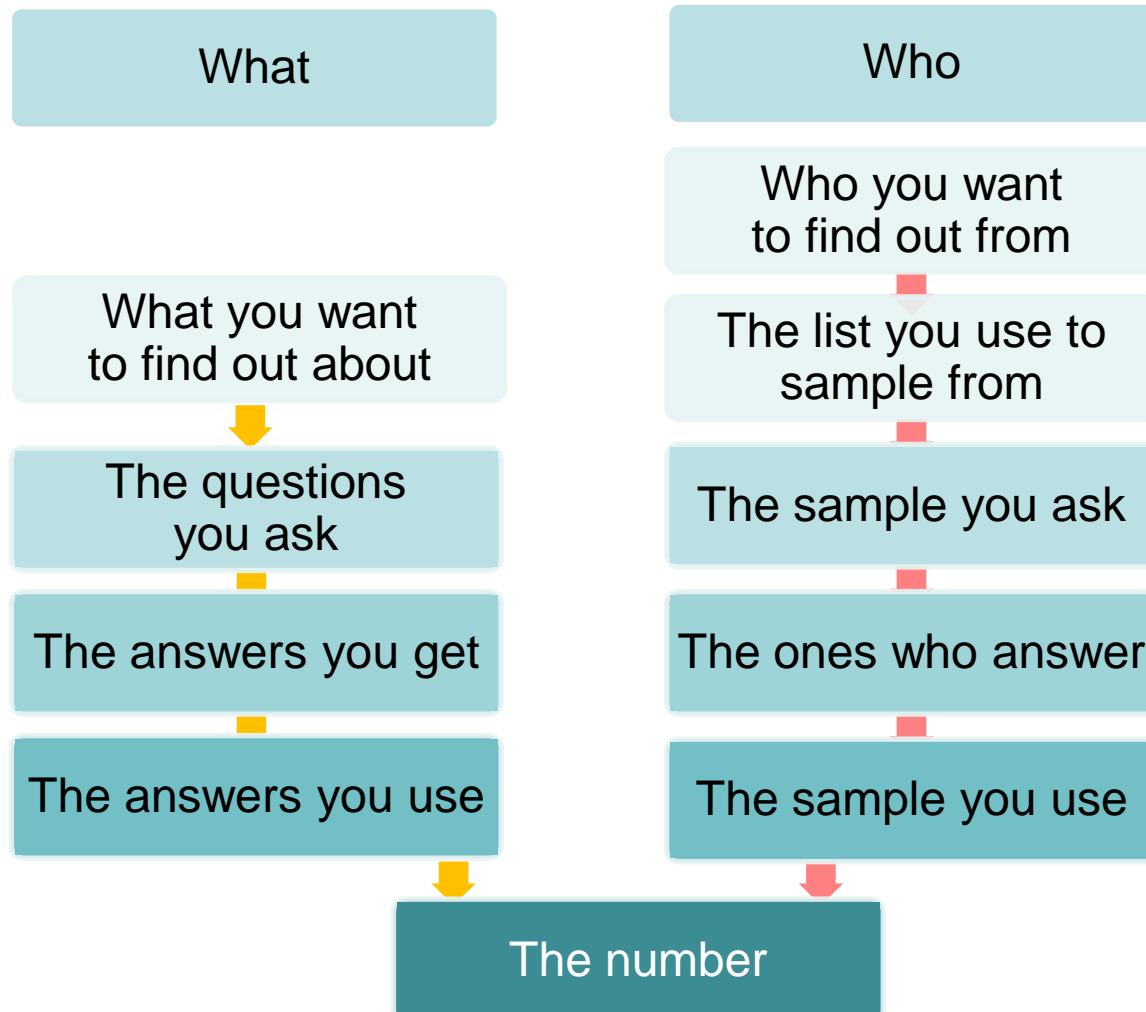
Search tools



Safe Search ▾



# Survey lifecycle for total survey error



[Performance](#) > [Department for Transport](#) > [Driver and Vehicle Licensing Agency](#)

Dashboard

# Tax disc renewals

Visit this service

[Renew a tax disc](#)

This dashboard shows information about how the **Tax disc renewals** service is currently performing.

## [Transactions per year](#)

**43.4m**

Jan to Dec 2013

+1.30% ▲ Oct 2012 to Sep 2013

## [Total cost](#)

**£44.7m**

Jan to Dec 2013

+17.23% ▲ Oct 2012 to Sep 2013

## [Cost per transaction](#)

**£1.03**

Jan to Dec 2013

+15.73% ▲ Oct 2012 to Sep 2013

## [Live service usage](#)

Users currently on the GOV.UK start page for the service

**275**

users online at  
9pm 17 July 2014

## [User satisfaction](#)

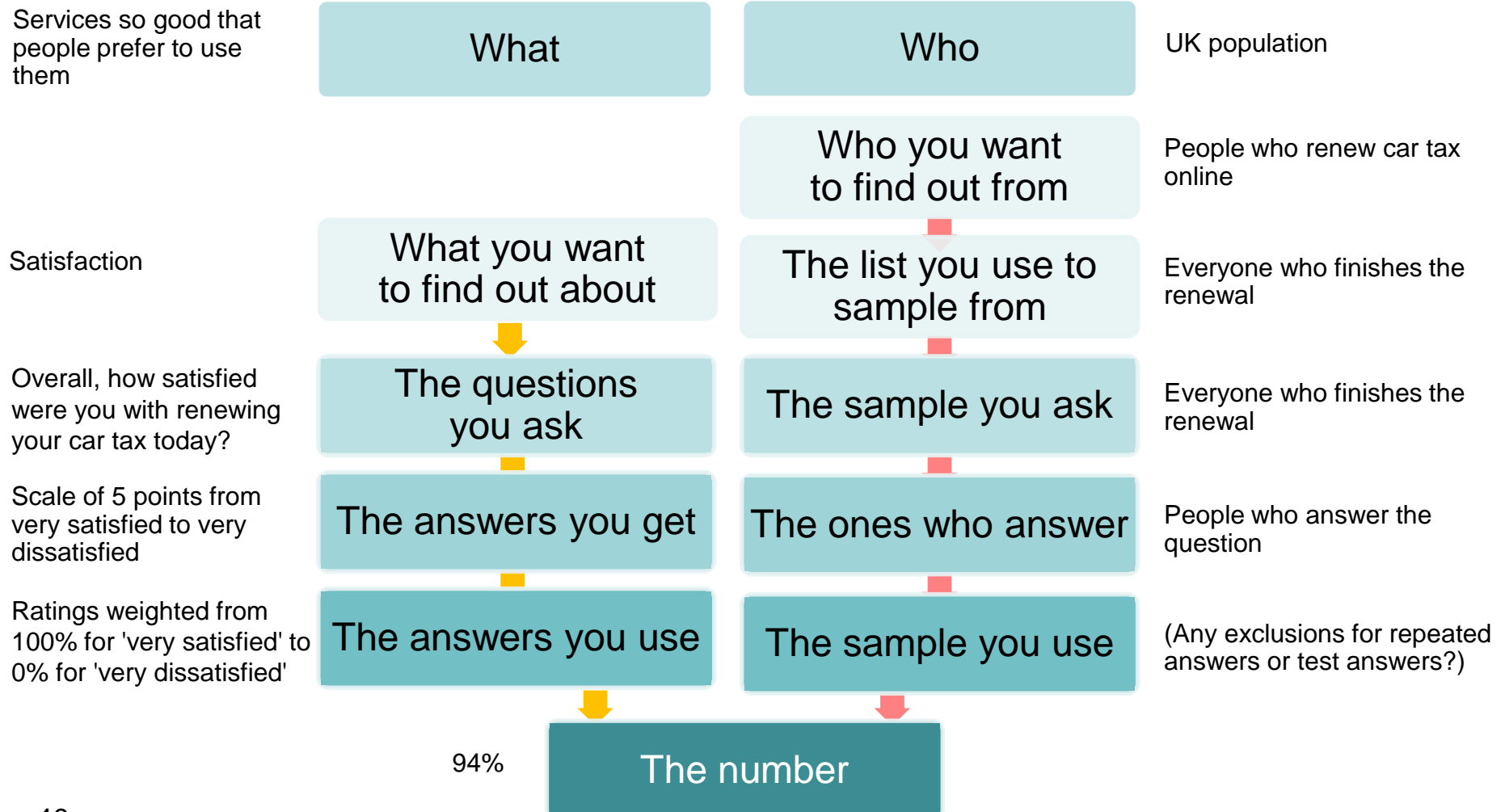
Overall satisfaction score includes all ratings weighted from 100% for 'very satisfied' to 0% for 'very dissatisfied'

**94%** +0.41% ▲

Mar 2014

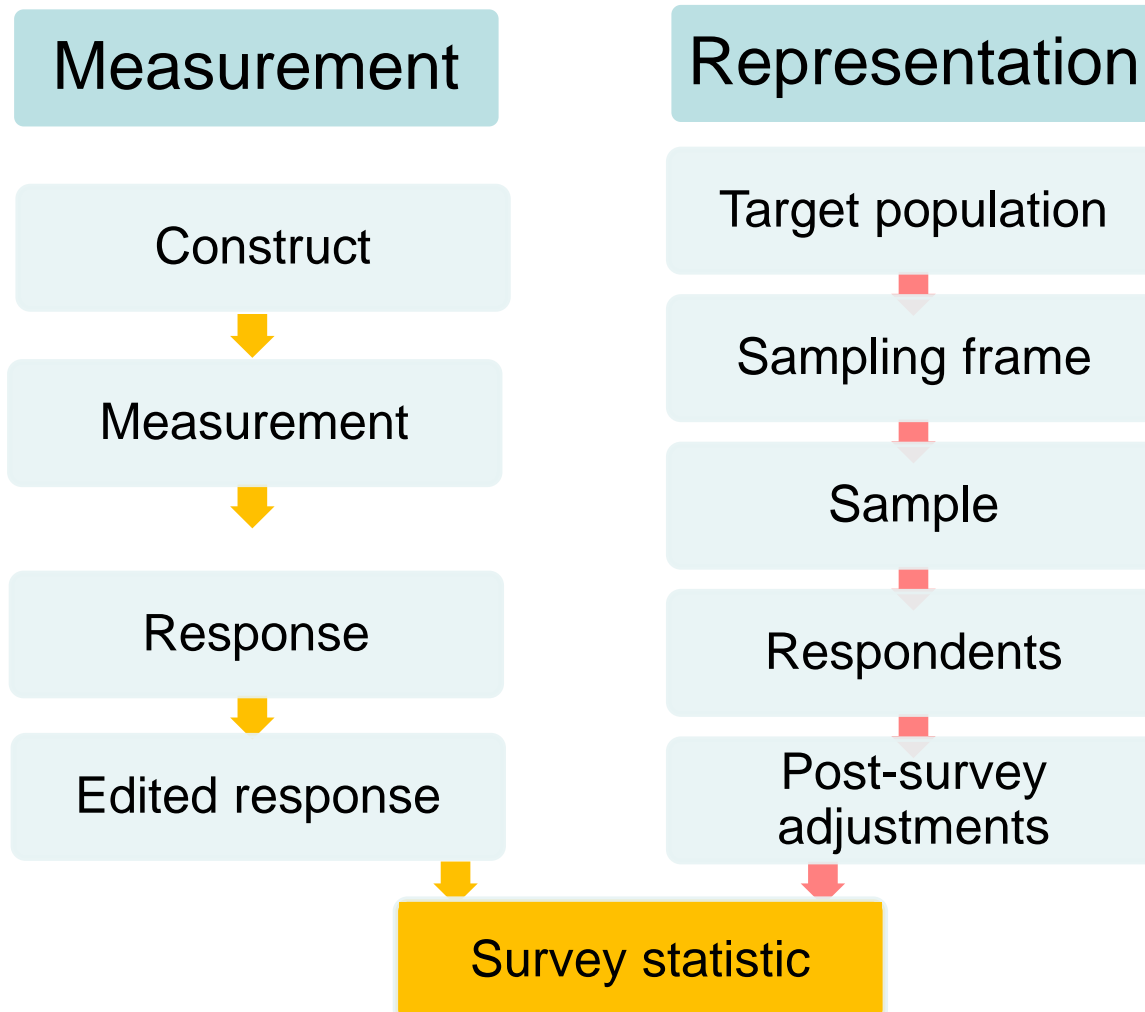
Feb 2014

# Choices compared to the lifecycle





# And now in “survey methodologist”



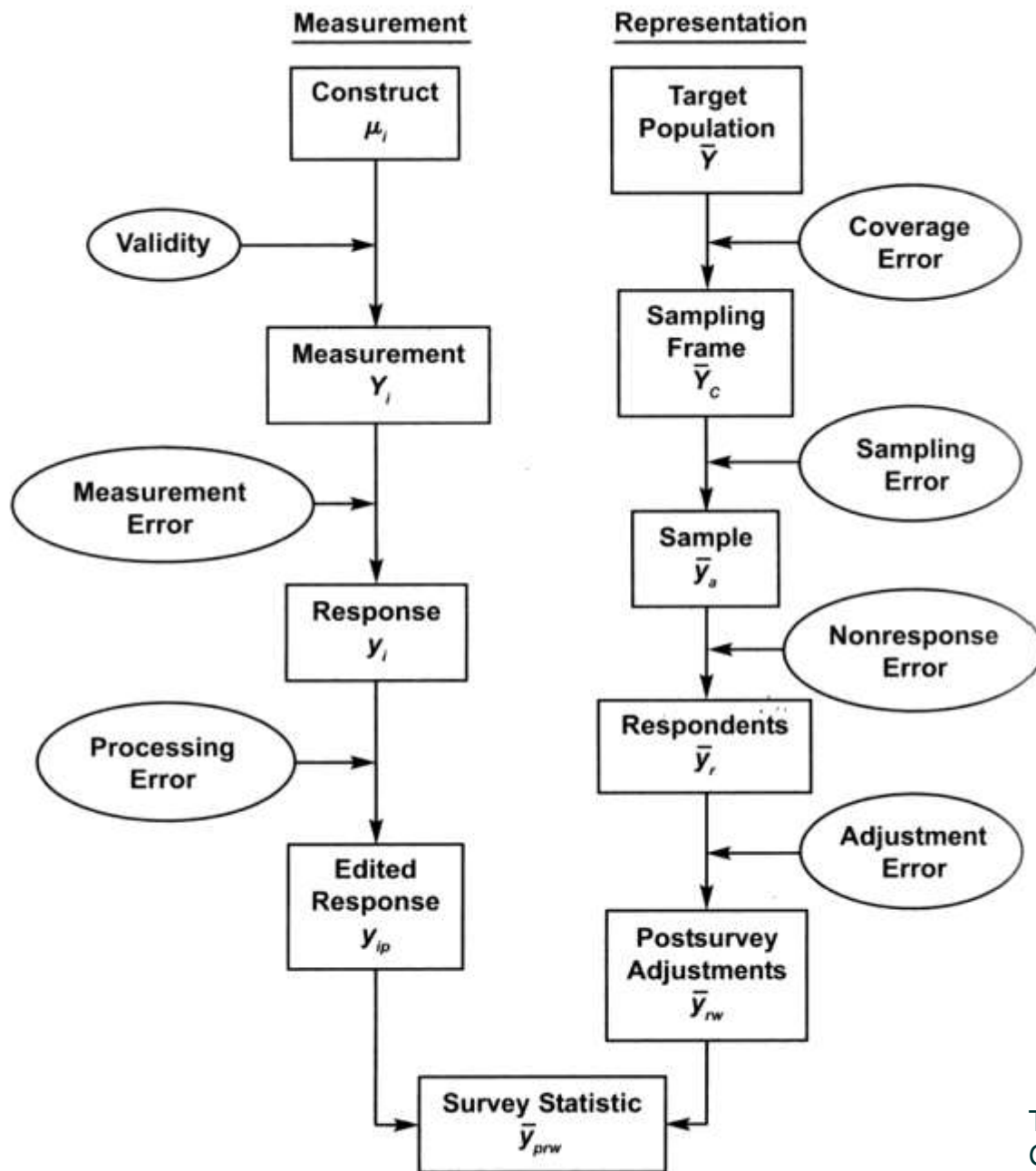


Figure 2.5 Survey life cycle from a quality perspective.

Total Survey Error diagram as presented in Groves, R. M., F. J. Fowler, M. P. Couper, J. M. Lepkowski, E. Singer and R. Tourangeau (2009). Survey methodology. Hoboken, N.J., Wiley.

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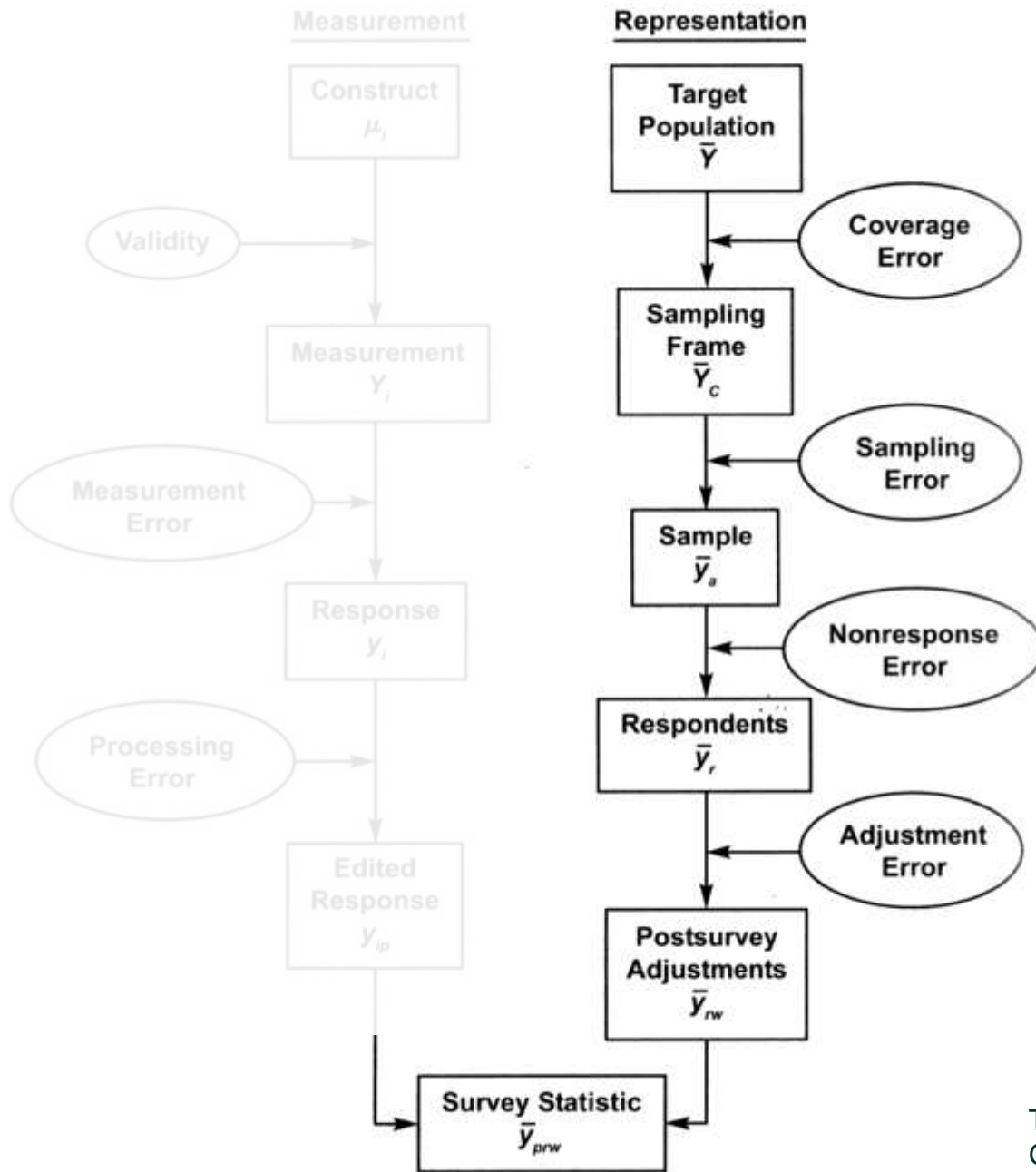
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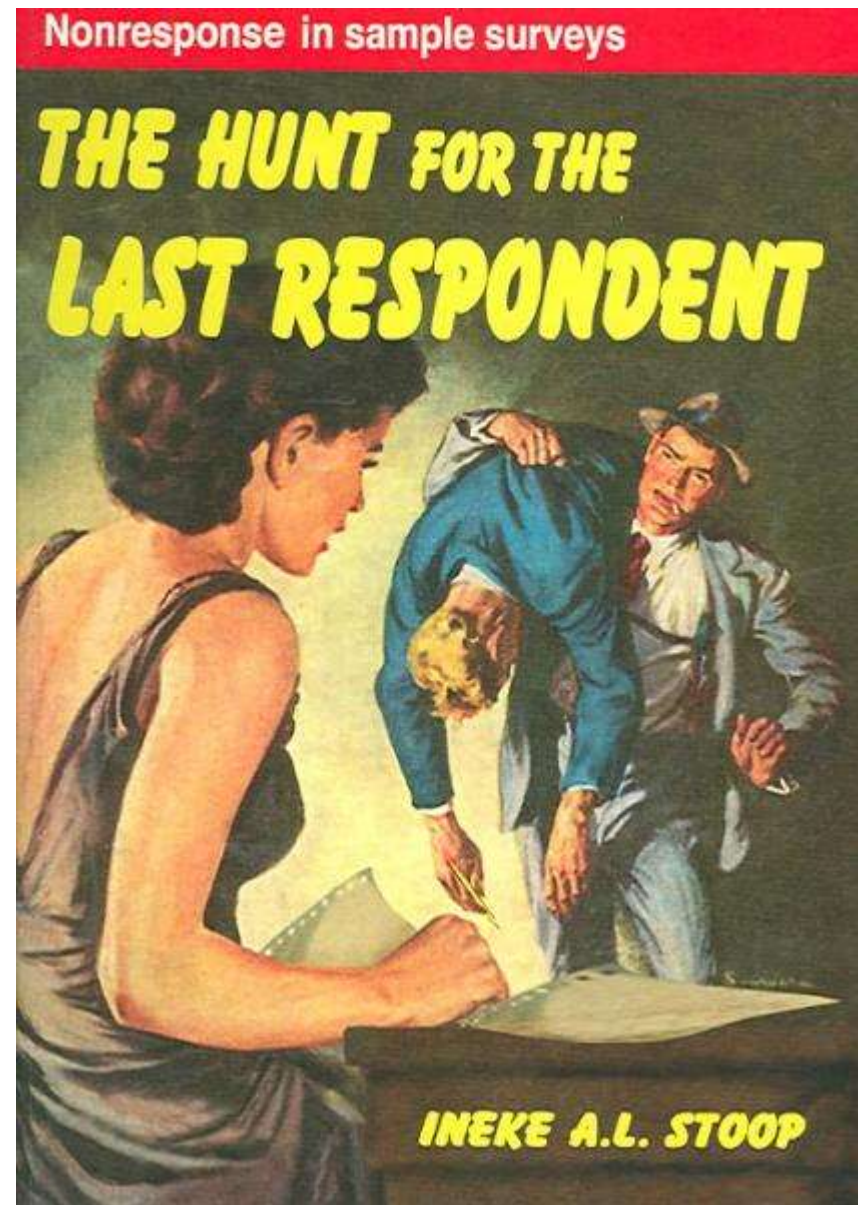
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**Figure 2.5** Survey life cycle from a quality perspective.

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Ineke Stoop did  
a deep dive into  
nonresponse error



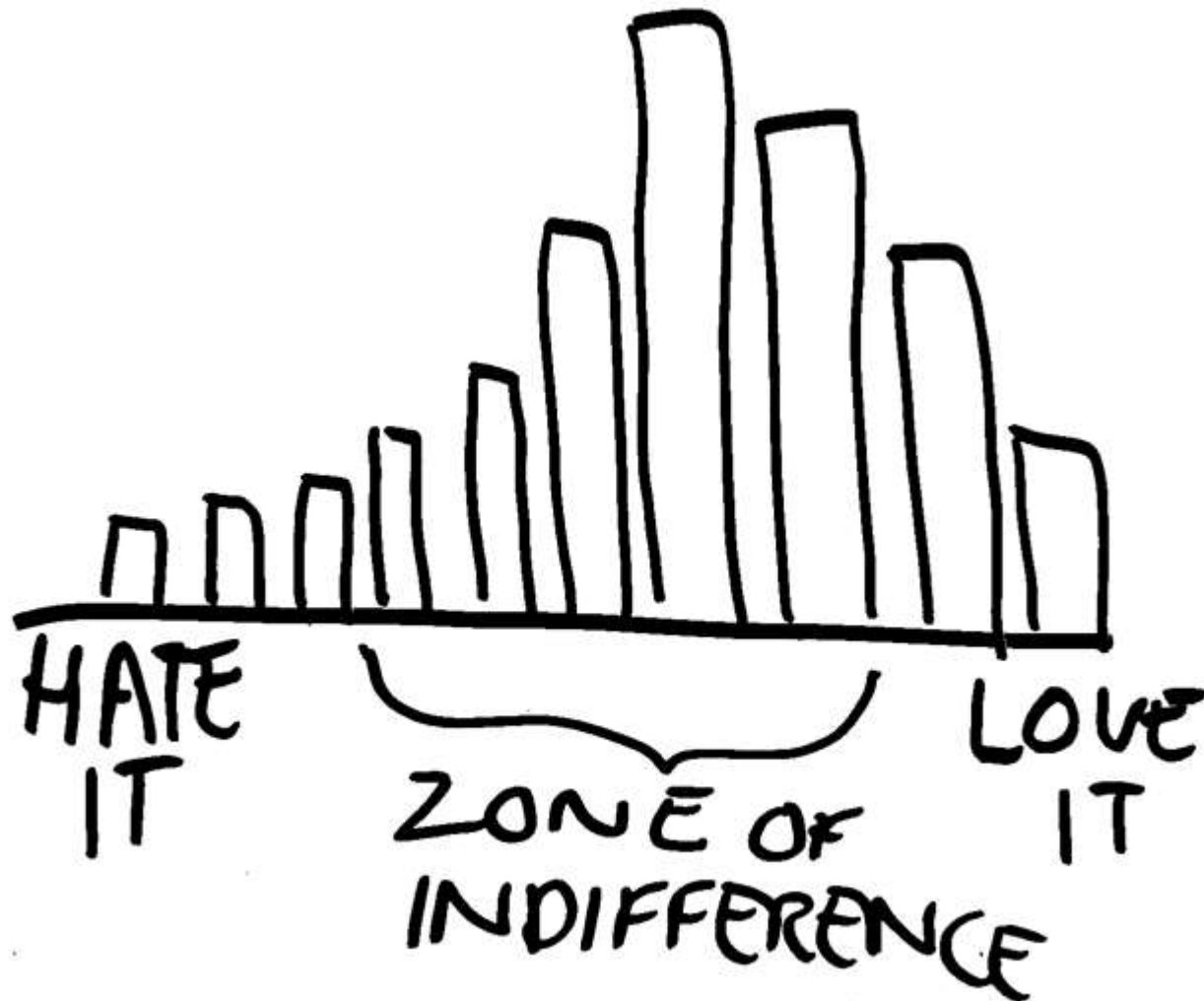
[http://www.scp.nl/english/Publications/Publications\\_by\\_year/Publications\\_2005/The Hunt for the Last Respondent](http://www.scp.nl/english/Publications/Publications_by_year/Publications_2005/The_Hunt_for_the_Last_Respondent)

# Nonresponse can happen for unexpected reasons

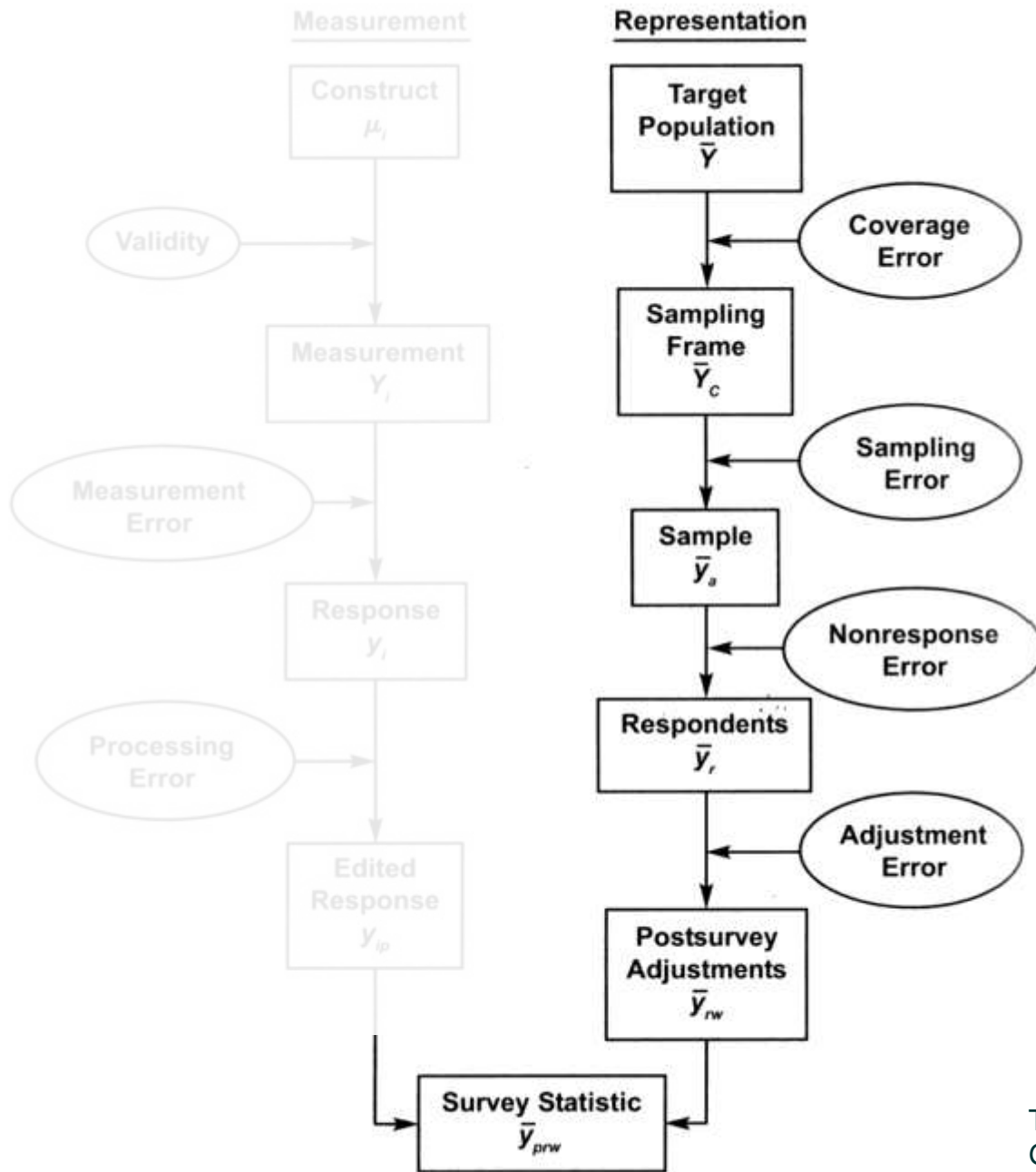
“ There is anecdotal evidence of interviewers not pushing the doorbell of sample addresses with aspidistras on the windowsill because this indicated elderly people and possibly very long interviews.”



The 'zone of indifference' is a common cause of nonresponse error







**Figure 2.5** Survey life cycle from a quality perspective.

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# Survey methodologists don't tell us much about how to deal with raw data

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Response	CollectorID	StartDate	EndDate	IP Address	Email Address	First Name	Last Name	Custom Data	Has this ever happened to you?	Please tell us how often this happens	Were any of these among the reasons why this happened?	Were any of these among the reasons why this happened?	Were any of these among the reasons why this happened?	Were any of these among the reasons why this happened?	Were any of these among the reasons why this happened?
2										Response	Any comments	Open-Ended	Not enough time	Too much time	Not enough resources	Required
3	1.84E+09	25799379	#####	#####	178.255.68.130					Yes, this has happened to me a lot	Tested a few times	Not enough time	Too much time	Not enough resources		
4	1.84E+09	25799379	#####	#####	87.54.33.152					Yes, this has happened to me a lot	We were confused	Not enough time	Too much time	Not enough resources		
5	1.84E+09	25799379	#####	#####	93.96.7.142					Yes, this has happened to me a lot	Hundreds of times	Not enough time	Too much time	Not enough resources		
6	1.84E+09	25799379	#####	#####	108.18.52.93					Never. (Please skip to question 6)						
7	1.84E+09	25799379	#####	#####	86.144.202.97					Yes, this has happened to me a lot		Too much time	Not enough resources			
8	1.84E+09	25799379	#####	#####	75.110.190.53					Yes, this has happened to me a lot	For a class project, we tested a beta Web site. Two at a time					
9	1.84E+09	25799379	#####	#####	94.192.47.161					Yes, this has happened to me a lot	www.ons.gov.uk, redesign was handled poorly.					
10	1.84E+09	25799379	#####	#####	190.16.222.19					Never. (Please skip to question 6)						
11	1.84E+09	25799379	#####	#####	50.98.177.199					Yes, this has happened to me a lot	An enterprise software company (accounting software)	Required				
12	1.84E+09	25799379	#####	#####	207.14.191.54					Yes, this has happened to me a lot	Sometimes I've reported the same issue as before	Required				
13	1.84E+09	25799379	#####	#####	84.144.228.142					Yes, but only rarely.		Not enough time	Too much time	Not enough resources		
14	1.84E+09	25799379	#####	#####	80.166.221.122					Yes, this has happened to me a lot	This happens pretty often	Too much time	Not enough resources			
15	1.84E+09	25799379	#####	#####	166.248.66.27					Yes, this has happened to me a lot	Performed a lot of testing	Not enough time	Too much time	Not enough resources		
16	1.84E+09	25799379	#####	#####	174.29.180.121					Yes, this has happened to me a lot	What client? As I stated	Not enough time	Too much time	Not enough resources		
17	1.84E+09	25799379	#####	#####	81.96.100.234					Yes, this has happened to me a lot	Not enough time	Too much time	Not enough resources			
18	1.84E+09	25799379	#####	#####	76.116.195.74					Yes, this has happened to me a lot	A few years ago, I received a lot of feedback	Too much time	Not enough resources			
19	1.84E+09	25799379	#####	#####	99.226.18.125					Yes, this has happened to me a lot	This happens most frequently with decisions on	Required				
20	1.84E+09	25799379	#####	#####	76.205.174.109					Yes, this has happened to me a lot	Not enough time	Too much time	Not enough resources			
21	1.84E+09	25799379	#####	#####	87.238.84.65					Yes, this has happened to me occasionally.						
22	1.84E+09	25799379	#####	#####	81.106.12.144					Yes, this has happened to me occasionally.	After a complete check	Too much time	Not enough resources			
23	1.84E+09	25799379	#####	#####	87.212.234.125					Yes, this has happened to me occasionally.	It was at very large project	Too much time	Not enough resources			
24	1.84E+09	25799379	#####	#####	86.158.95.18					Yes, this has happened to me occasionally.	Testing of	Not enough time				
25	1.84E+09	25799379	#####	#####	109.158.237.111					Yes, this has happened to me occasionally.	worked on an IA project. client requested	Not enough resources				
26	1.84E+09	25799379	#####	#####	86.29.186.176					Yes, this has happened to me occasionally.	Seo investigation results need to be reviewed	Not enough resources				
27	1.84E+09	25799379	#####	#####	81.193.141.212					Yes, this has happened to me occasionally.	For ethical reasons, I can't talk about the project					
28	1.84E+09	25799379	#####	#####	74.61.229.116					Yes, this has happened to me occasionally.	Change in requirements	Not enough time	Too much time	Not enough resources		
29	1.84E+09	25799379	#####	#####	121.44.43.100					Never. (Please skip to question 6)						
30	1.84E+09	25799379	#####	#####	71.227.31.194					Yes, this has happened to me occasionally.	People who I made a survey for	Not enough time				Required
31	1.84E+09	25799379	#####	#####	71.231.163.253					Never. (Please skip to question 6)	My employer, a small gov't agency, doesn't get usability and has no feedback					
32	1.84E+09	25799379	#####	#####	24.136.1.201					Yes, this has happened to me occasionally.	Testing user assistance w/3 users, findings were debated					
33	1.84E+09	25799379	#####	#####	67.177.245.147					Never. (Please skip to question 6)						
34	1.84E+09	25799379	#####	#####	174.109.55.201					Yes, this has happened to me occasionally.	Nothing matters when the Big Boss Says So, except that					
35	1.84E+09	25799379	#####	#####	24.14.244.172					Yes, this has happened to me occasionally.	Where do I start? Link label changes, well received unfortunately					
36	1.84E+09	25799379	#####	#####	24.148.36.144					Never. (Please skip to question 6)						

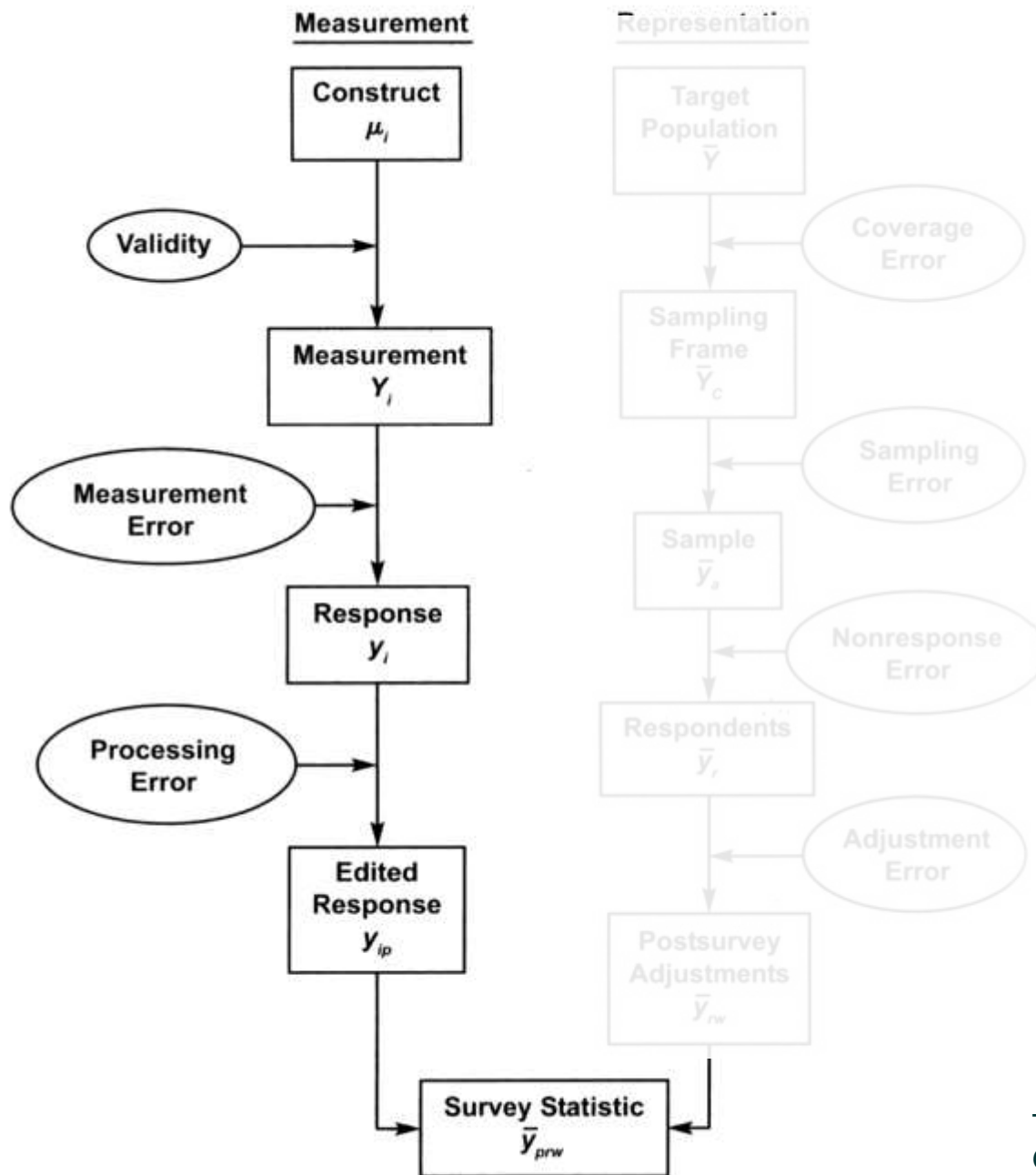


Figure 2.5 Survey life cycle from a quality perspective.

Total Survey Error diagram as presented in Groves, R. M., F. J. Fowler, M. P. Couper, J. M. Lepkowski, E. Singer and R. Tourangeau (2009). Survey methodology. Hoboken, N.J., Wiley.

# Steve Krug and I did an exploratory survey

**“But the light bulb  
has to want to  
change”**

Why do the most serious  
usability problems  
we uncover often go unfixed?

Steve Krug and Caroline Jarrett  
#upa2012 Las Vegas



# To deal with open questions: read and think

Read all  
the answers

Tiny number of  
irrelevancies

Ignore them:  
focus on your key  
findings instead

A few illuminating  
comments

Quote them:  
your stakeholders  
should see them

Lots of themes,  
similarities, repetition

Code them:  
summarize into  
categories



# A code is a symbolic phrase

“A code in qualitative inquiry is most often a word or short phrase that symbolically assigns a summative, salient, essence-capturing, and/or evocative attribute for a portion of language-based or visual data”

Saldaña (2013)

Saldaña, J. (2013).  
The coding manual for qualitative researchers.  
Los Angeles, [Calif.] ; London, SAGE.



# Some coding methods to consider

Method	What you do
“In vivo” coding	Choose small chunks of the respondent’s own words that are representative of the response
Adjectival coding	Use an adjective that sums up the response
Descriptive coding	Summarise in a word or short phrase (most often as a noun) the basic topic
Provisional coding	Establishes a predetermined start list of codes prior to the survey
(at least 20 others)	

# Try two coding methods

- Two teams
- One will try: descriptive coding
  - Summarise in a word or short phrase (most often as a noun) the basic topic in each answer
  - Try to group the codes you find into topics
- One will try: provisional coding
  - I have given you a set of four codes
  - Try to assign each response to a code





# Choose your coding method according to the goals of your survey

If you want to...	Consider....
Help your team to understand the way users think about a topic and the words they choose to express those thoughts	“In vivo” coding
Find out whether users are in favour of or against a proposed idea	Adjectival coding
Explore new ideas; be open to fresh suggestions	Descriptive coding
Support or disprove an existing idea or suggestion	Provisional coding
Something else	(plenty more to choose from)

# Today's challenge

Better survey questions

Warm up: the SUS

1: Tourangeau, Rips, Rasinski (2000)

2: Oliver (2010)

Better survey processes

3: Groves (many references)

4: Stoop (2005)

5. Saldaña (2013)

**6: Couper (2008)**

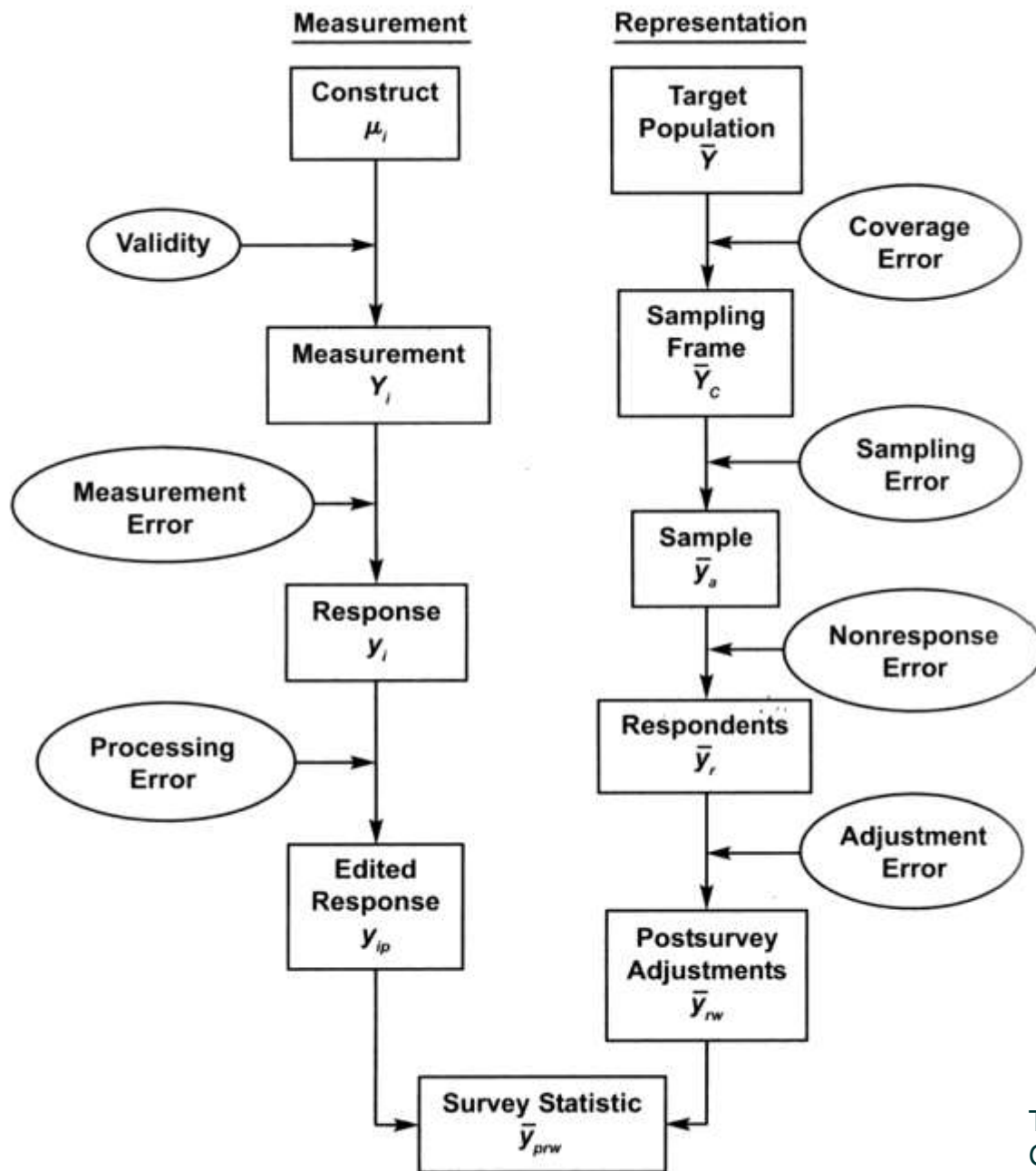


Figure 2.5 Survey life cycle from a quality perspective.

Total Survey Error diagram as presented in Groves, R. M., F. J. Fowler, M. P. Couper, J. M. Lepkowski, E. Singer and R. Tourangeau (2009). Survey methodology. Hoboken, N.J., Wiley.

# Tip

## Test everything

The image shows a German tax form (Einkommensteuererklärung) for the year 2019. The form is titled 'Einkommensteuererklärung' and includes sections for personal data, income, and deductions. The form is filled out with handwritten information, including the taxpayer's name, address, and various tax-related details. The form is a standard German tax form used for reporting income and deductions to the tax authorities.

# Which one works?

- How often to show a progress indicator?
  - Always
  - Intermittently (after about eight pages)
  - On demand (if the user asks for it)
- What does the progress indicator tell you?
  - Fast to slow (progression is quicker at the start of the survey)
  - Slow to fast (progression is slower at the start of the survey)
  - Constant speed (exactly the correct amount of progress)



# Removing a progress indicator: no difference in completion rates

Blog

## GDS design notes

Organisations: [Government Digital Service](#)

Search blog



### Do less – Problems as shared spaces

[Ben Holliday](#), 7 July 2014 — [Experimental](#)

Most traffic engineers will approach a problem with a road by adding something to solve it. This means new signs, traffic lights, or road markings. All attempts to influence driver behaviour.



#### GDS design notes

We believe in designing in the open. Most of the ideas on this blog will be iterated on over time, some of them will test badly and never make it onto GOV.UK, a few might end up being patterns that we use everywhere.

#### Categories

Select Category

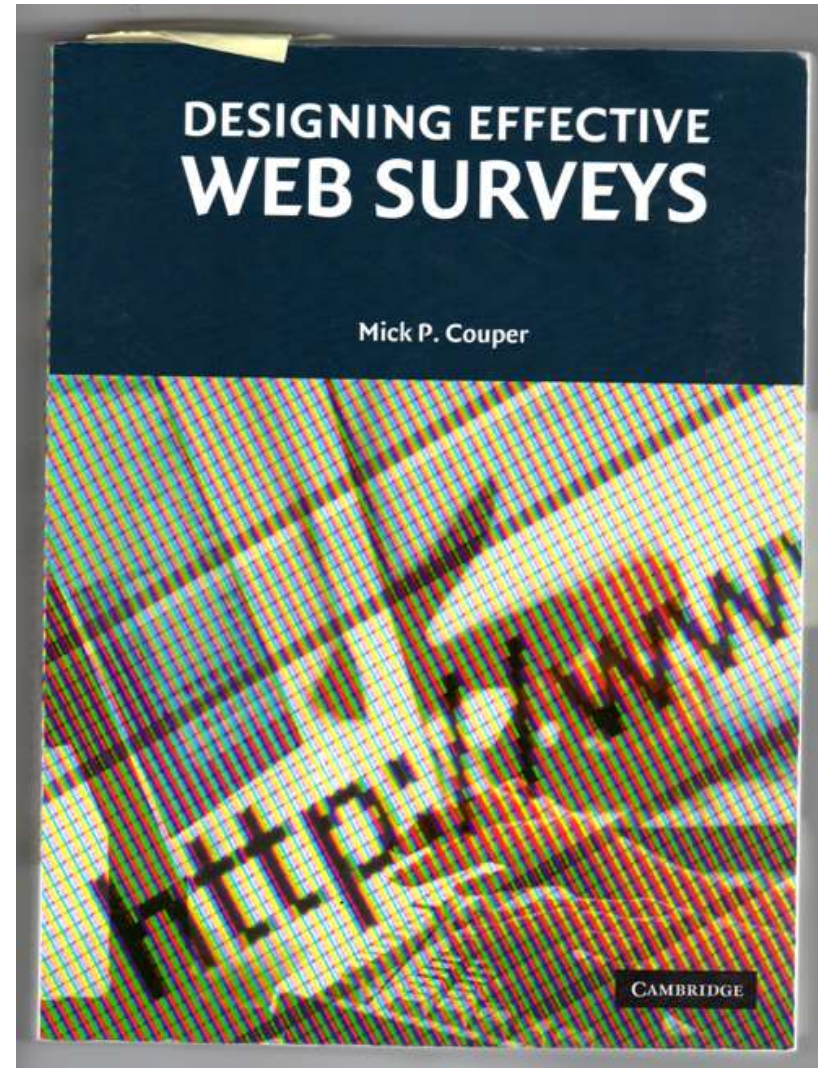


Sign up for updates

# Mick Couper has devoted years to testing everything for you

- Buy the book
- If you have access to an academic library, look for vast numbers of Couper papers

Couper, M. (2008). Designing effective Web surveys. Cambridge, Cambridge University Press.



# Today's challenge

## Better survey questions

Warm up: the SUS

1: Tourangeau, Rips, Rasinski (2000)

2: Oliver (2010)

## Better survey processes

3: Groves (many references)

4: Stoop (2005)

5. Saldaña (2013)

6: Couper (2008)



# Today's concepts

## Better survey questions

Warm up: the SUS

- 1: Ask questions that people can answer
- 2: Satisfaction is a slippery topic

## Better survey processes

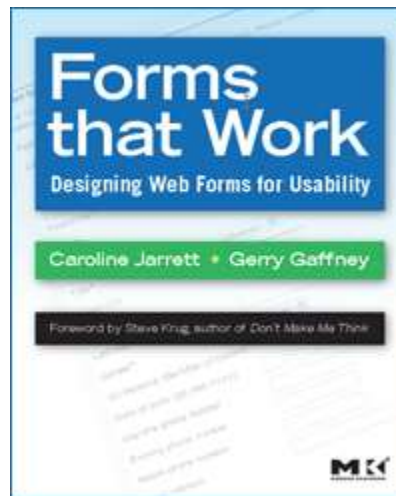
- 3: Assess the total survey error
- 4: Understand who responds
5. Your survey goals drive your analysis
6. Test everything

# Caroline Jarrett

Twitter @cjforms

<http://www.effortmark.co.uk>

[carolinej@effortmark.co.uk](mailto:carolinej@effortmark.co.uk)



# More resources on

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

