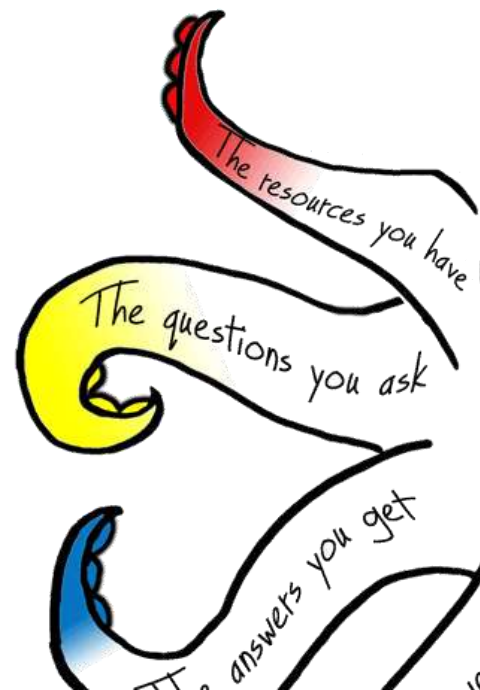


Getting valid results from surveys

Meet the Survey Octopus

Caroline Jarrett
@cjforms
#UXNZ2015



What would you do for a dollar?

\$1 in the envelope beats \$10 guaranteed later



Luton Business Survey 2011 - YOUR HELP IS NEEDED

Adams, Orchid <Orchid.Adams@luton.gov.uk>

Sent: Mon 06/06/2011 09:49

To:

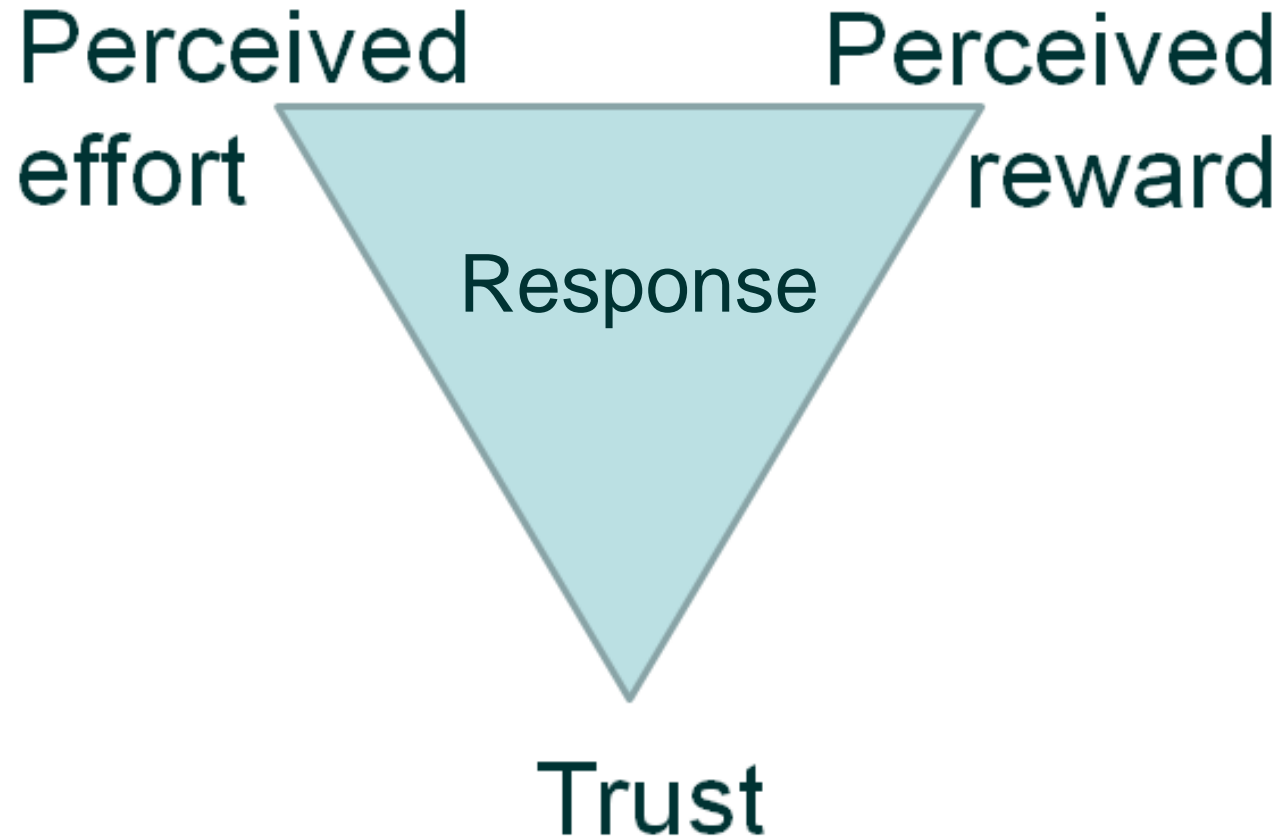
Message image007.gif (841 B) image009.jpg (2 KB) image011.jpg (2 KB) image002.gif (841 B) image003.jpg (2 KB)
image004.jpg (2 KB) image005.gif (841 B) image006.jpg (2 KB) image007.jpg (2 KB) image002.gif (845 B)
image003.jpg (2 KB) image004.jpg (2 KB) image005.gif (845 B) image006.jpg (2 KB) image007.jpg (2 KB)

We want Luton to be a great place to do business.
We need your help to make this happen.



Luton Borough Council, alongside BMG Research, are currently conducting a business survey about the needs of local businesses. This will help the Council to effectively shape and deliver services that support long term economic growth. We would be grateful if you could participate in this online survey and help us to help you. The survey will expire on 26th June 2011

[Click Here to Complete Survey](#)



I'm a forms specialist



Why do people answer questions?



People ask me about surveys

“Please have a look at this survey”

“How many people do I need in my sample?”

“Tell me whether this is a good question”

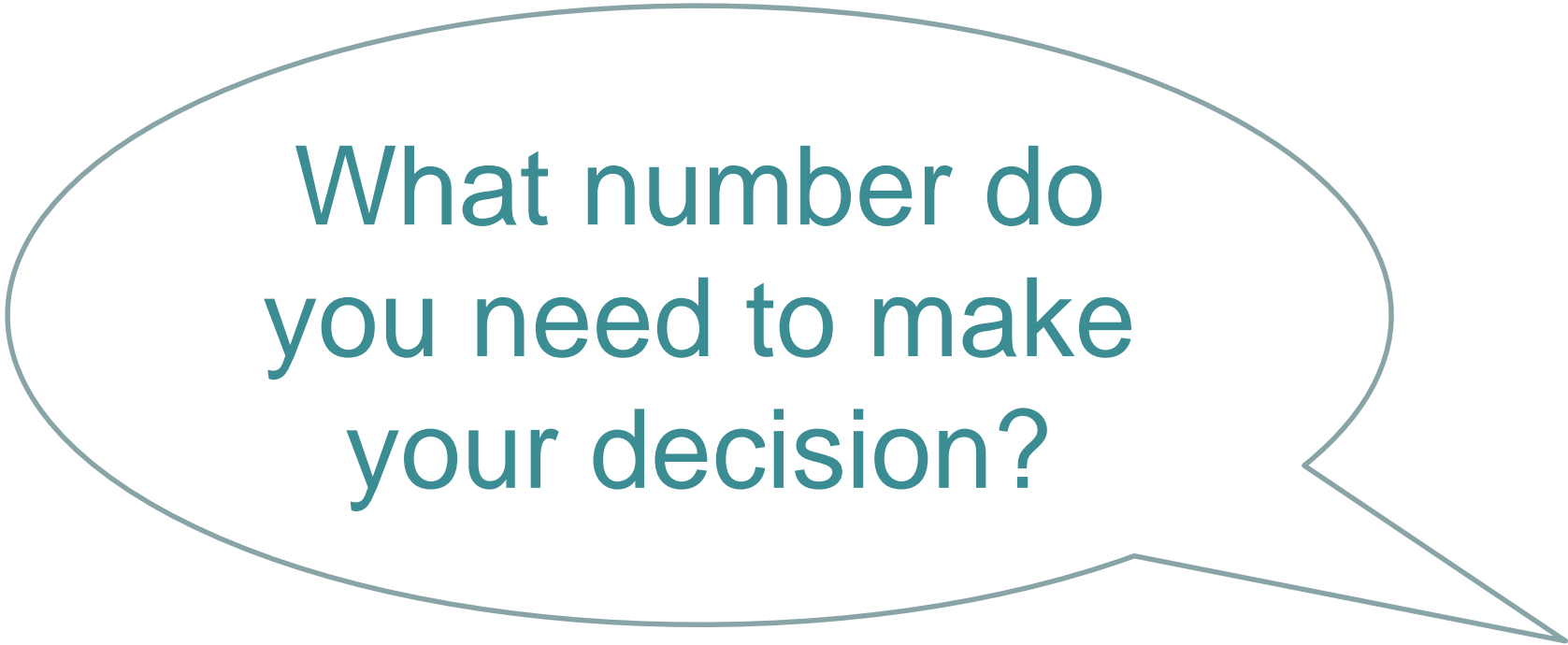
“I prefer 5 points in a rating scale, but my boss likes 7.
Who’s is right?”

“Please have a look at this survey?”



Kill survey!
Kill! Kill!

“Please have a look at this survey?”



What number do
you need to make
your decision?

The survey is a systematic method for gathering information from (a sample of) entities for the purpose of constructing quantitative descriptors of the attributes of the larger population of which the entities are members.

Groves, Robert M.; Fowler, Floyd J.; Couper, Mick P.; Lepkowski, James M.; Singer, Eleanor & Tourangeau, Roger (2004). *Survey methodology*. Hoboken, NJ: John Wiley & Sons.

The aim of a survey is to get a number that helps you to make a decision

What you want
to ask about

Who you
want to ask

Survey

The number



Home

Browse for stats

Tools and services

Methods

Help for survey participants

About us

New Zealand's Environmental Reporting Series

ENVIRONMENTAL INDICATORS

Te taiao Aotearoa

[Learn more here](#)



Population clock
4,627,552



Unemployment Jun qtr
5.9%



CPI Sep qtr
0.3%



GDP Jun qtr
+0.4%



Visitor arrivals Sep mth
216,984



Top statistics

Latest releases



Businesses reach 500,000 landmark

29 October

In February 2015, the number of businesses in New Zealand passed the half million mark for the first time.



Growth of one-person and two-person households driven by ageing population

29 October

One-person households are projected to be the fastest growing household type in New Zealand, increasing from 390,000 in 2013 to 580,000 in 2038.



Follow us



Follow us



Upcoming releases

30 Oct Building Consents Issued:
September 2015

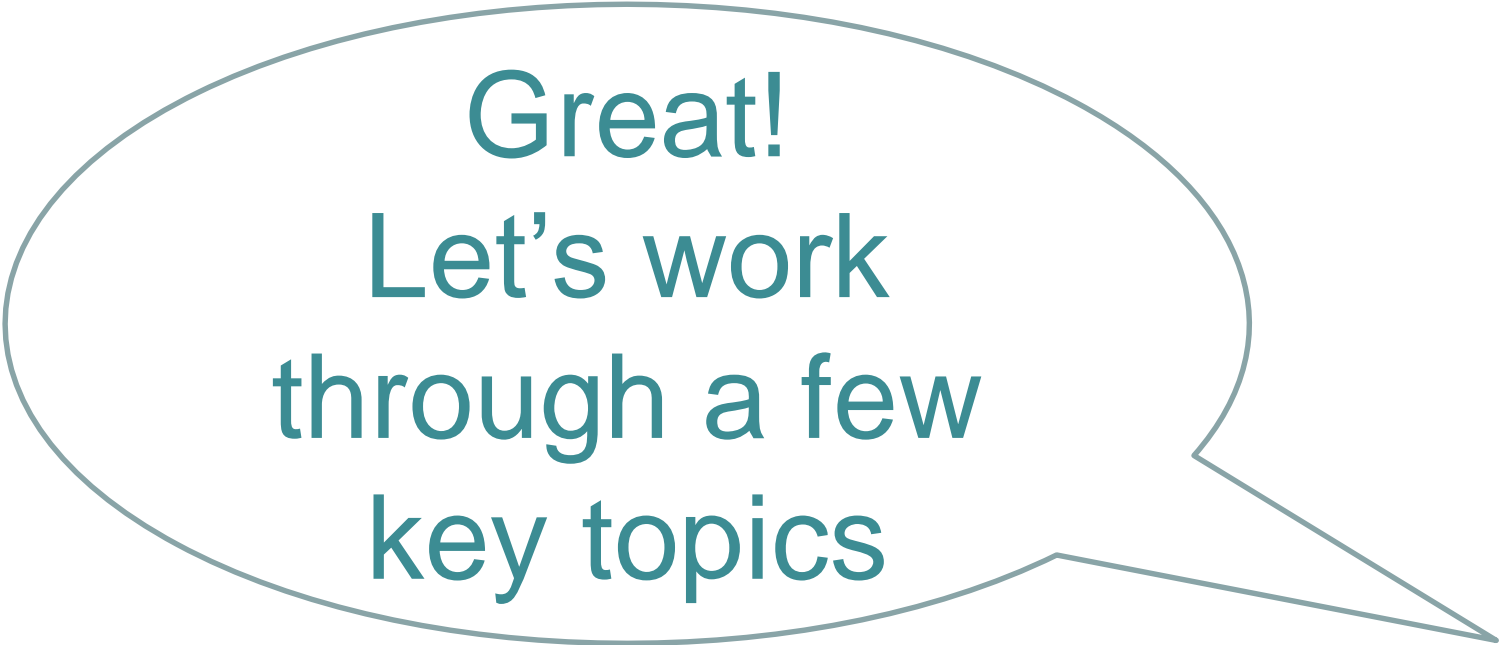
4 Nov Civil Unions and Marriages:
September 2015 quarter
(provisional)

4 Nov Labour Market Statistics:
September 2015 quarter



[View full release calendar](#)

“Yes, to make <decision> we need <number>”



Great!
Let's work
through a few
key topics

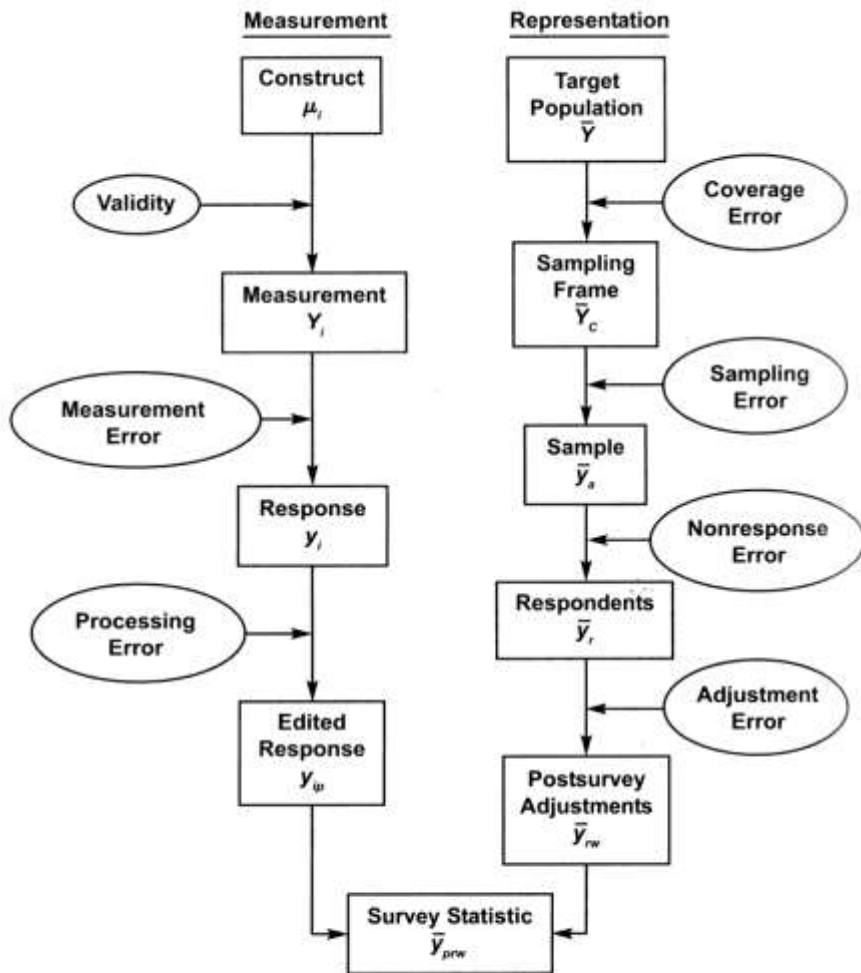
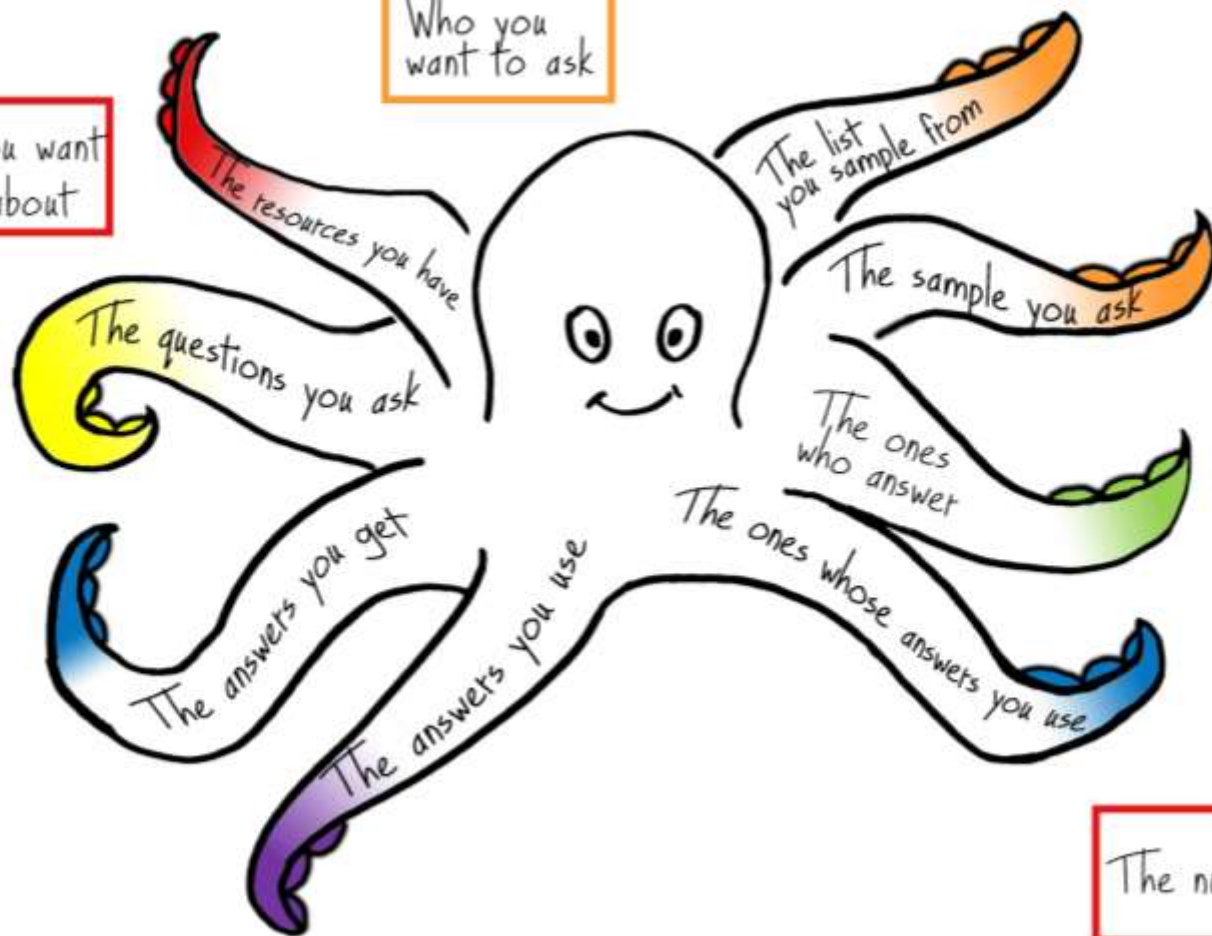


Figure 2.5 Survey life cycle from a quality perspective.

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.

What you want
to ask about

Who you
want to ask



The number

People ask me about surveys

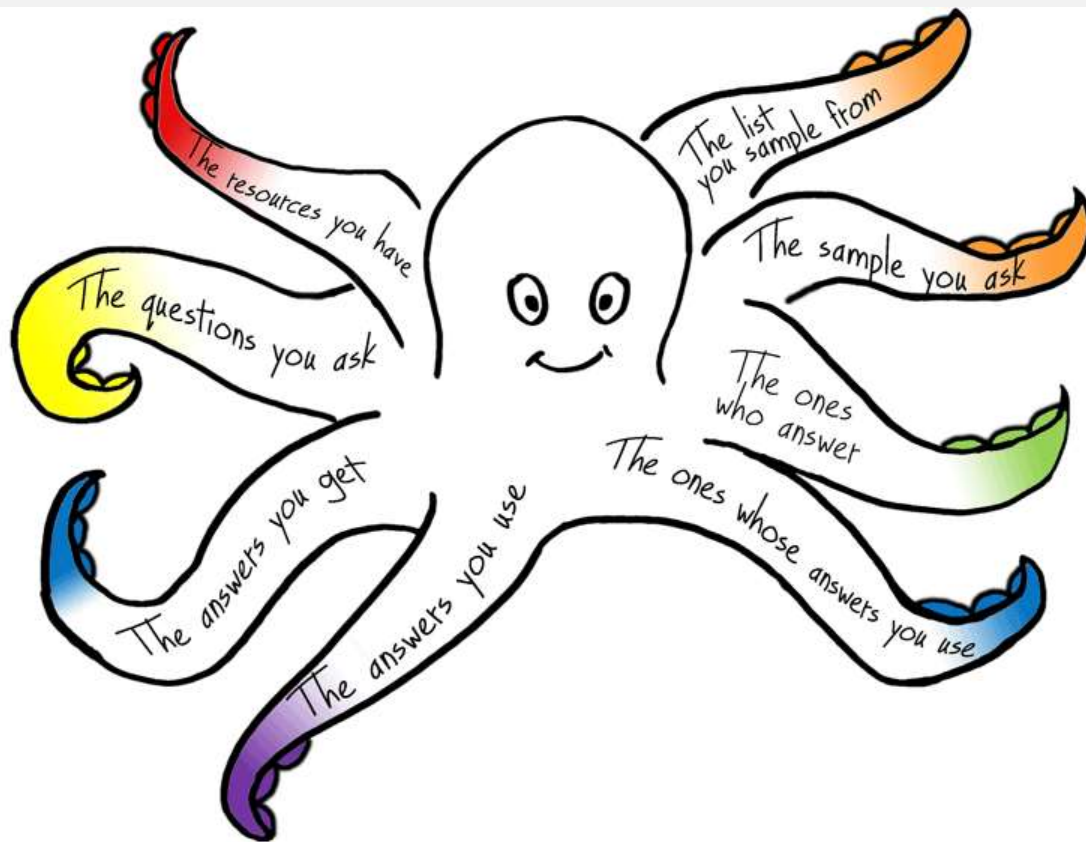
“Please have a look at this survey”

“How many people do I need in my sample?”

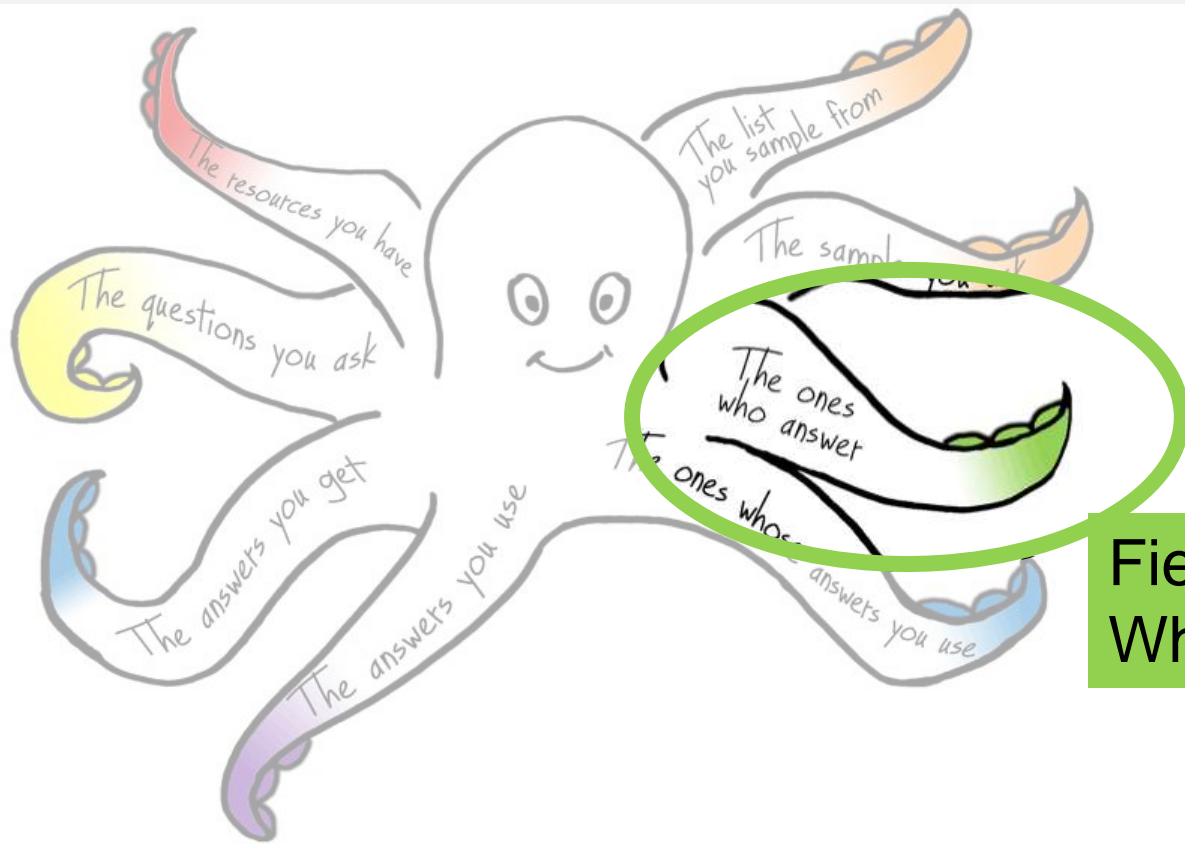
“Tell me whether this is a good question”

“I prefer 5 points in a rating scale, but my boss likes 7.
Who’s is right?”

To work that out, let's visit the Octopus

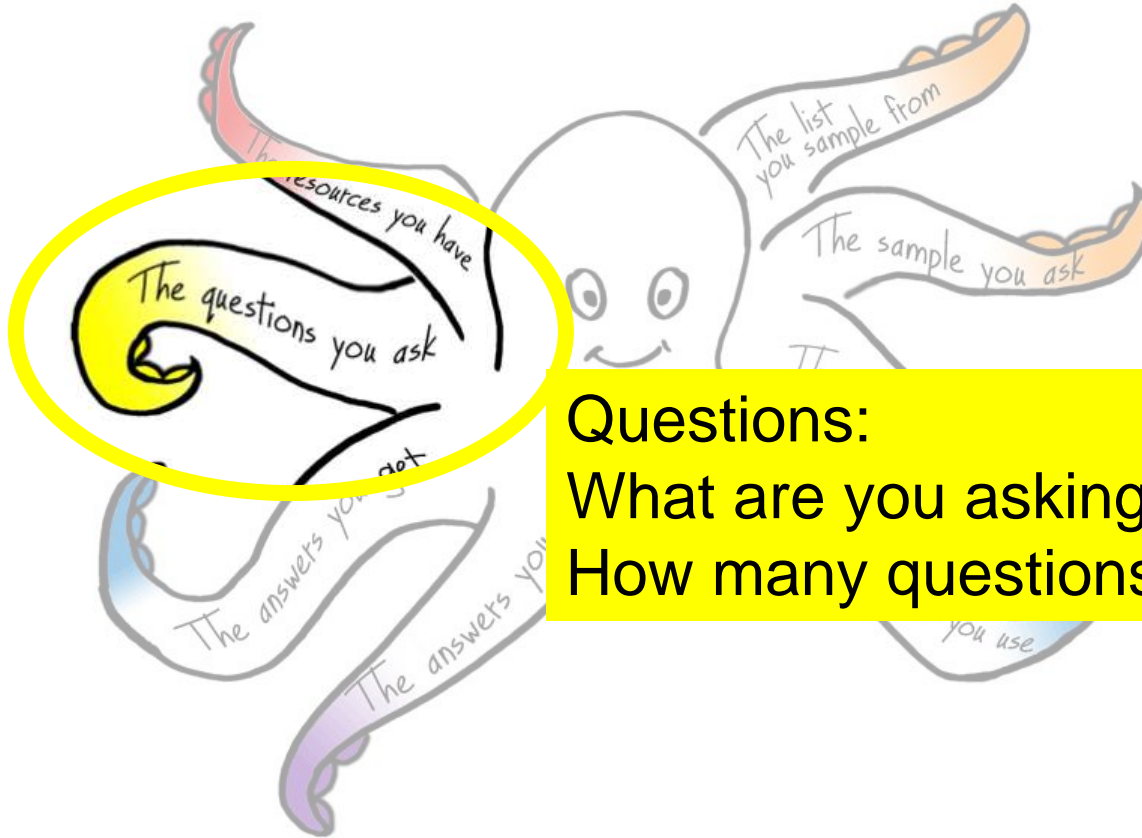


Start with how many will answer



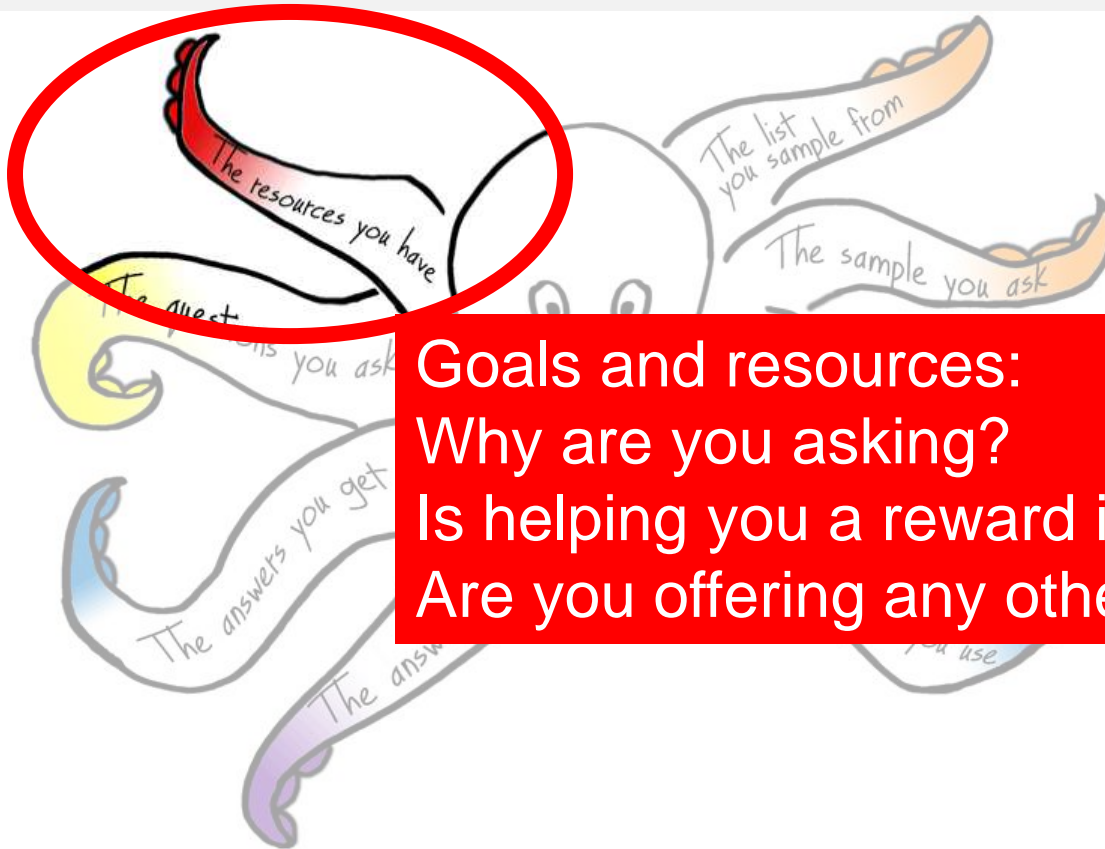
Fieldwork:
Who answers?

Whether they'll answer depends on effort



Questions:
What are you asking about?
How many questions?

And on the reward you're offering



Goals and resources:
Why are you asking?
Is helping you a reward in itself?
Are you offering any other incentive?

Then there's the 'Justin Bieber North Korea' problem

Prank leaves Justin Bieber facing tour of North Korea

By Daniel Emery

Technology reporter, BBC News

Canadian singer Justin Bieber's has become the target of a viral campaign to send him to North Korea.

A website polled users as to which country he should tour next, with no restrictions on the nations that could be voted on.

There are now almost half a million votes to send the singer to the secretive communist nation.

The contest, which ends at 0600 on 7 July, saw North Korea move from 24th to 1st place in less than two days.

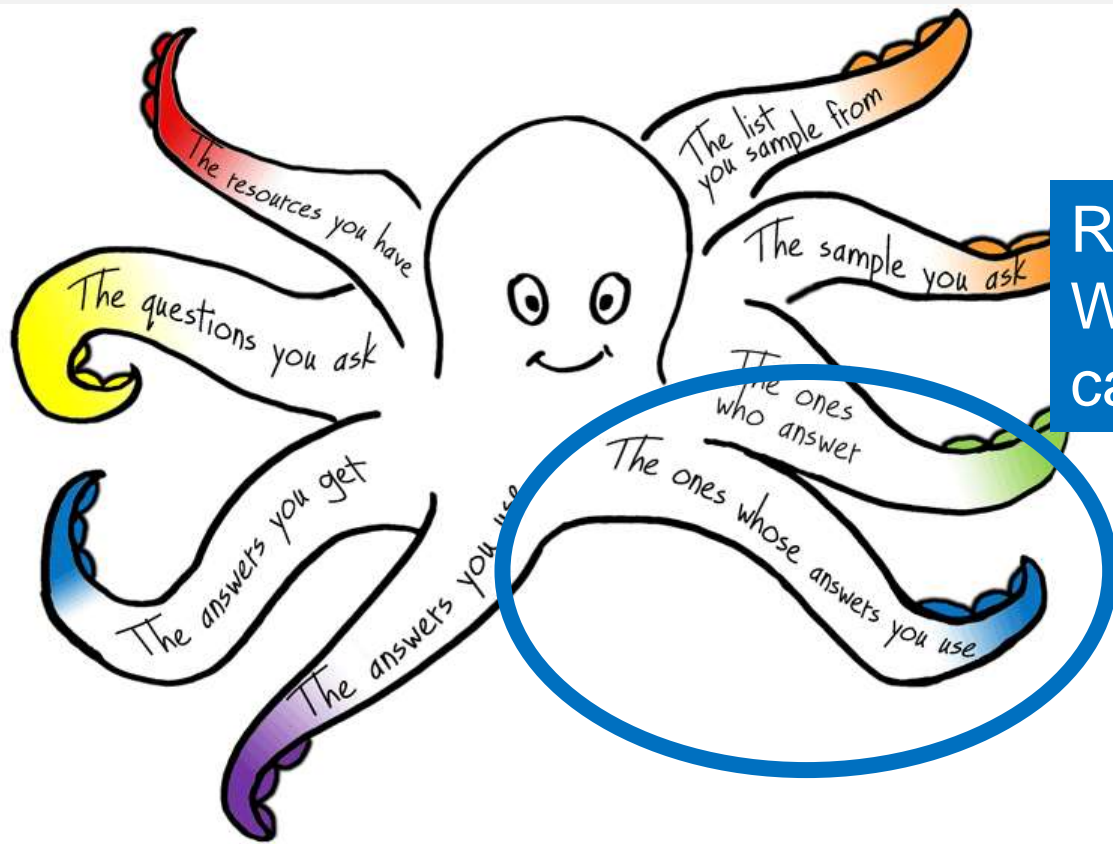
Many of the votes are thought to originate from imageboard website 4chan, which has built a reputation for triggering online viral campaigns.



It is highly unlikely Bieber would be given permission to enter North Korea

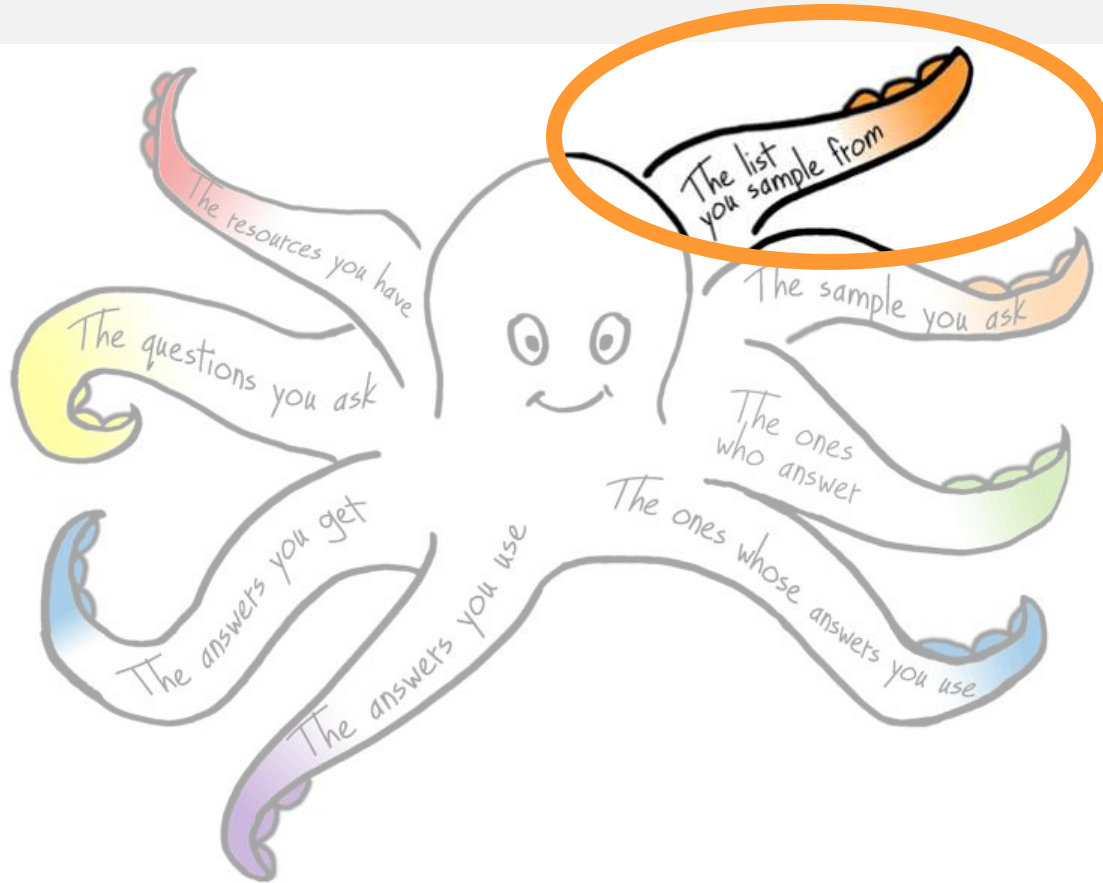
Related Stories

If we ask 'anyone', we'll have extra work here



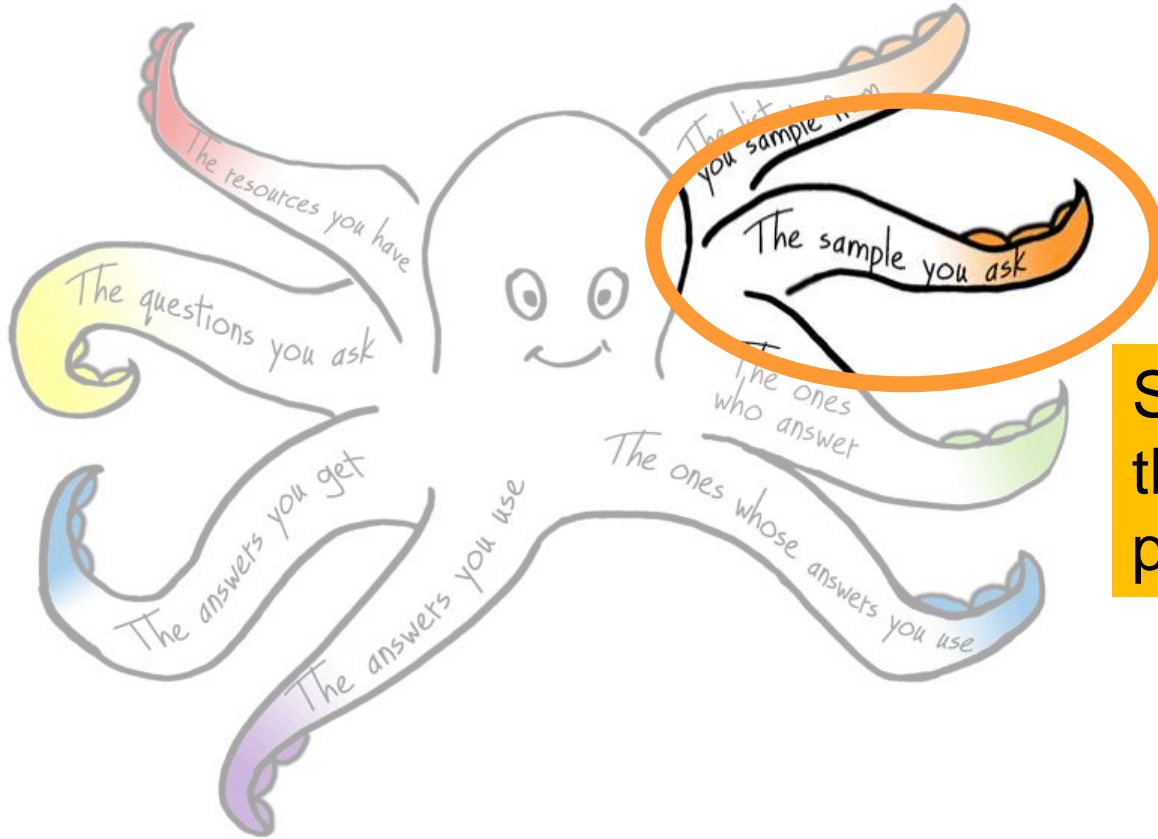
Response:
Whose answers
can we use?

So it matters where we get our sample



**Sample:
the list you
sample from**

And now it's easy to work out how many to ask



Sample:
the number of
people to ask

We thought about a lot of topics to work that out

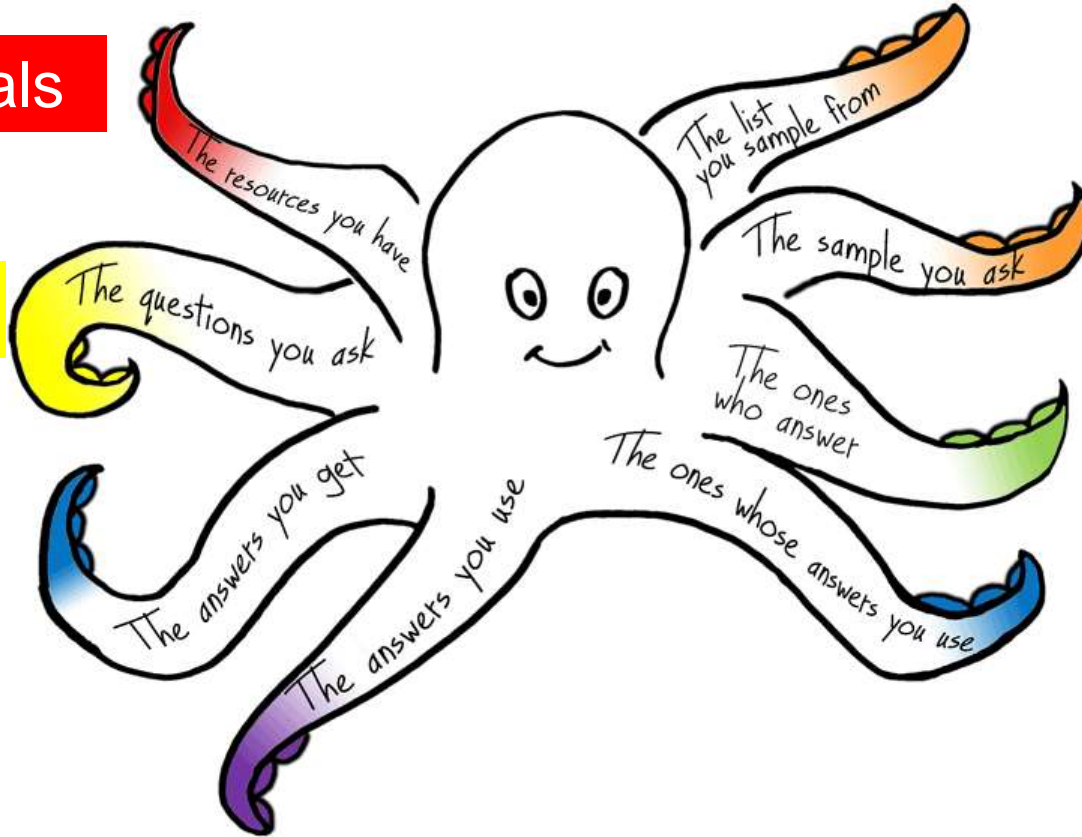
Goals

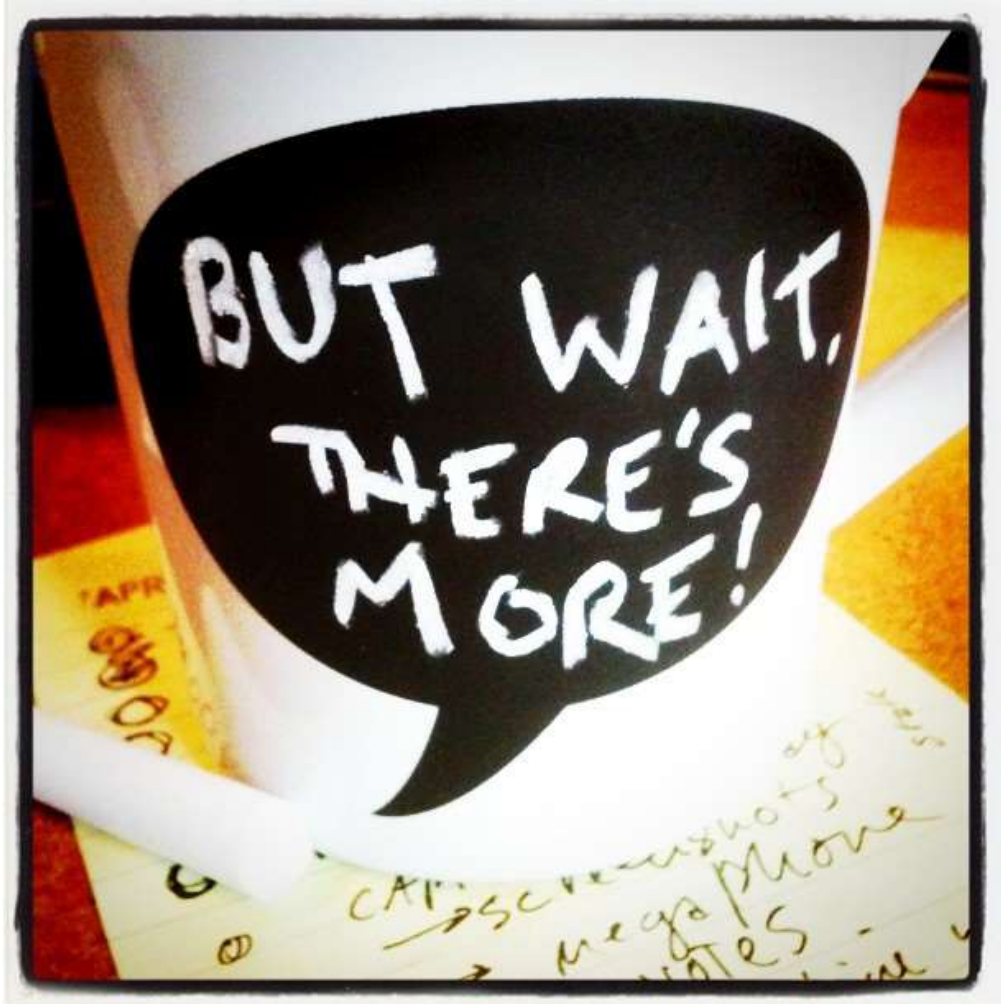
Questions

Sample

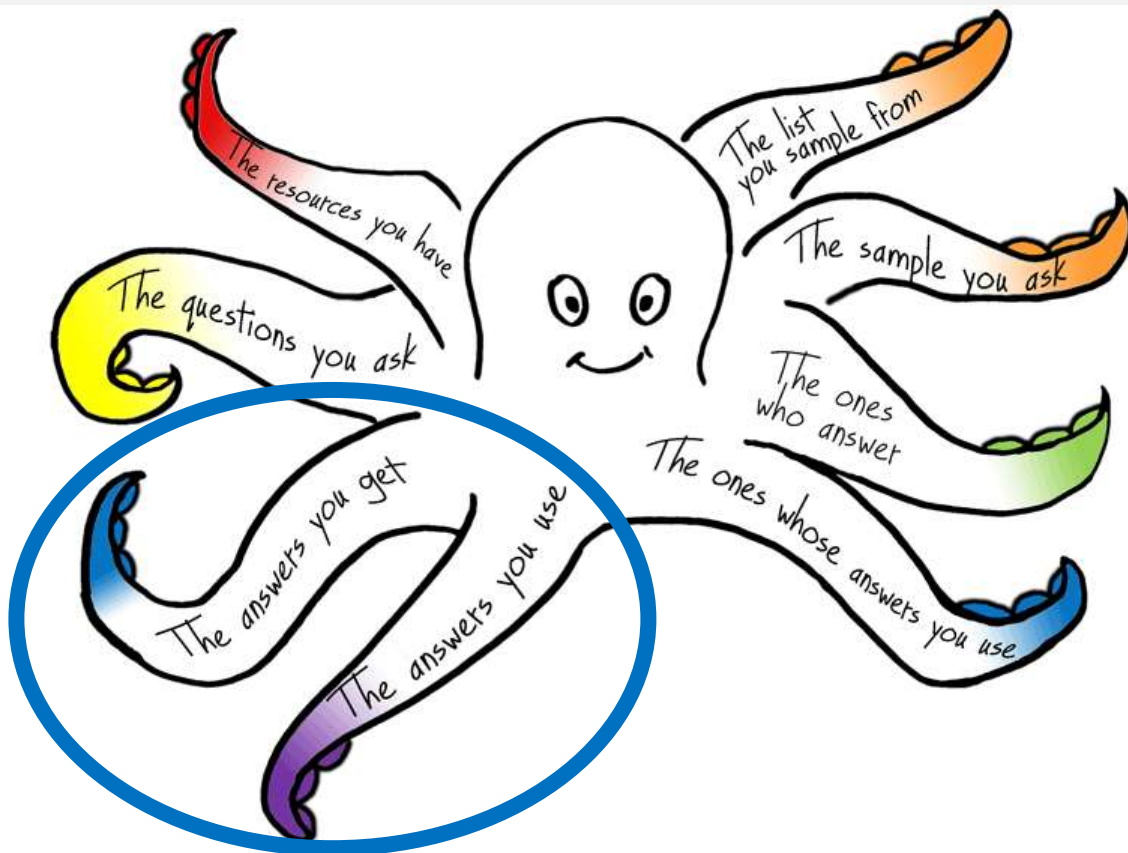
Fieldwork

Response





What about this bit?



People ask me about surveys

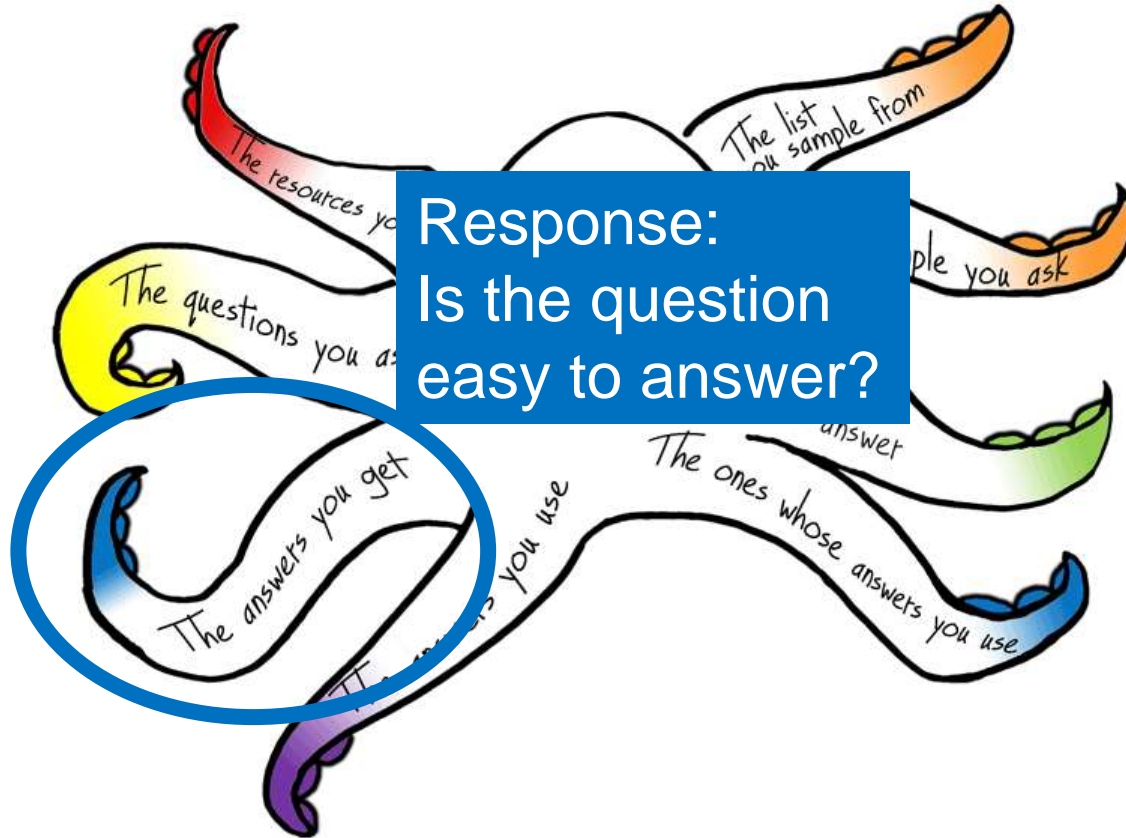
“Please have a look at this survey”

“How many people do I need in my sample?”

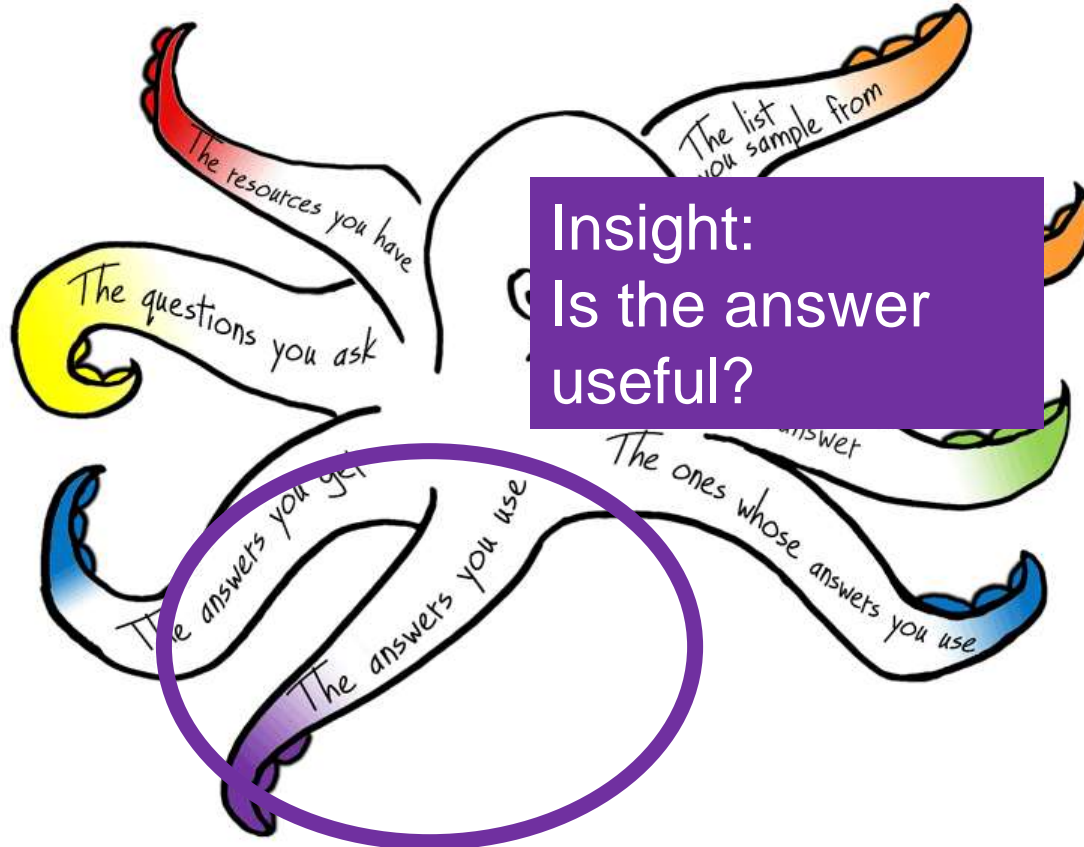
“Tell me whether this is a good question”

“I prefer 5 points in a rating scale, but my boss likes 7.
Who’s is right?”

A good question gets good answers



Good answers help you to make decisions



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?

%

All the topics are connected

Goals

Questions

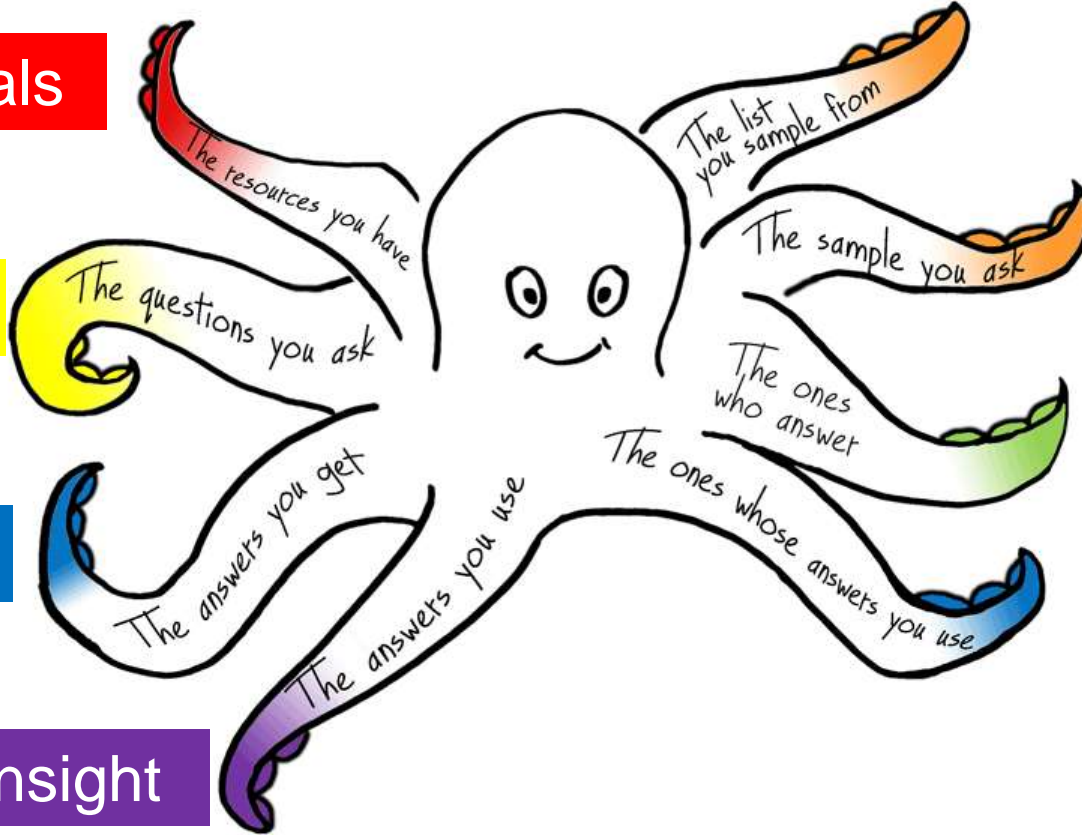
Response

Insight

Sample

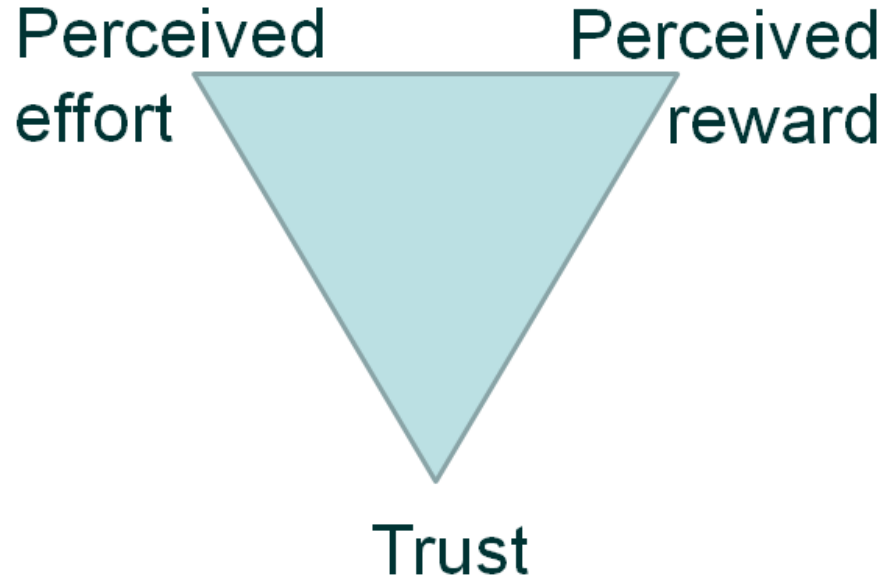
Fieldwork

Response

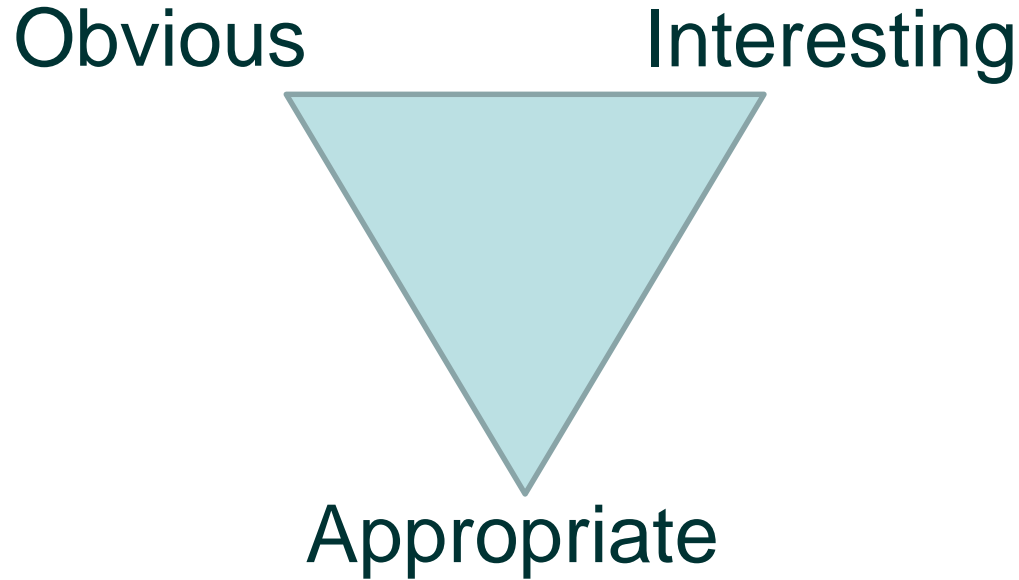


Let's think a bit more about response

Response depends on effort, reward, and trust



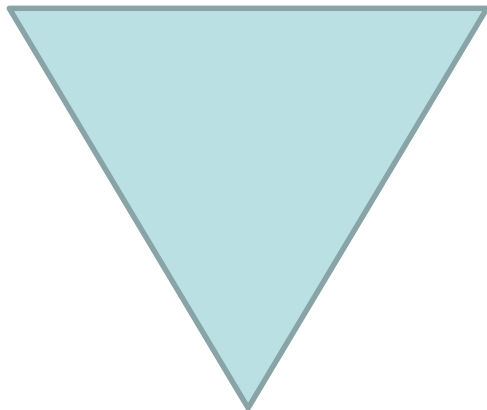
A good question works in three ways



Why did you visit our website today?

Obvious

Interesting



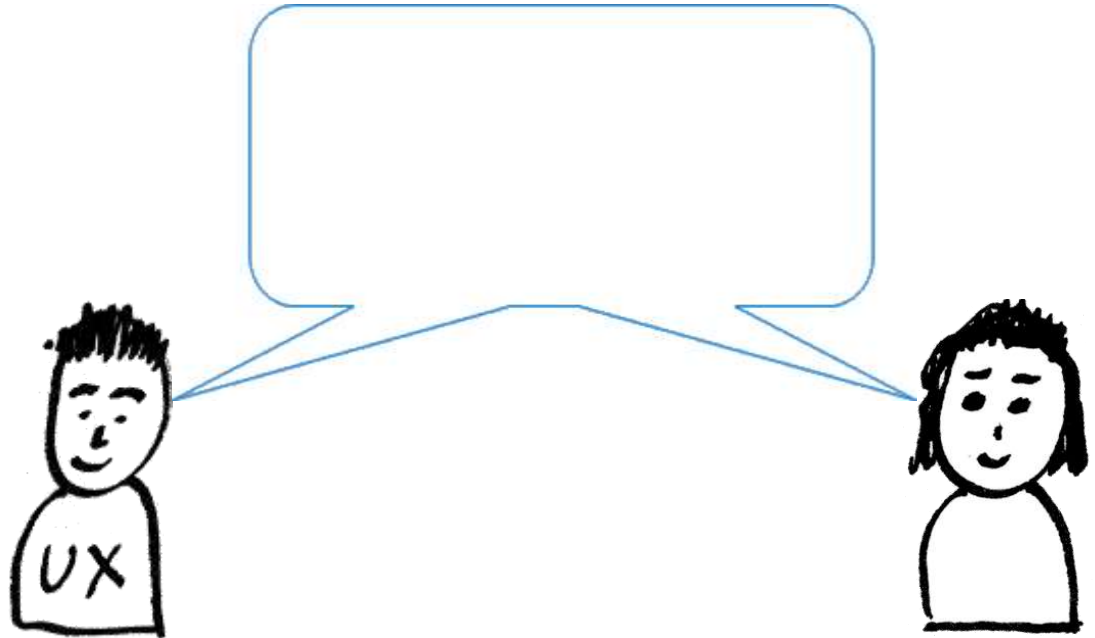
Appropriate

Would you recommend us to a friend or family member?

	In a shop, buying a baby carriage	In a hospital, having a miscarriage
Obvious	Yes	
Interesting	Yes	
Appropriate	Yes	Cruelly inappropriate

Tip

Test your questions by
interviewing in context

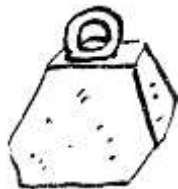


Let's think a bit more about fieldwork



1950s mindset: “Ask Everything”

Survey =
Big Honkin' Survey



Big Honkin' Survey = think hard about everything

Goals

Questions

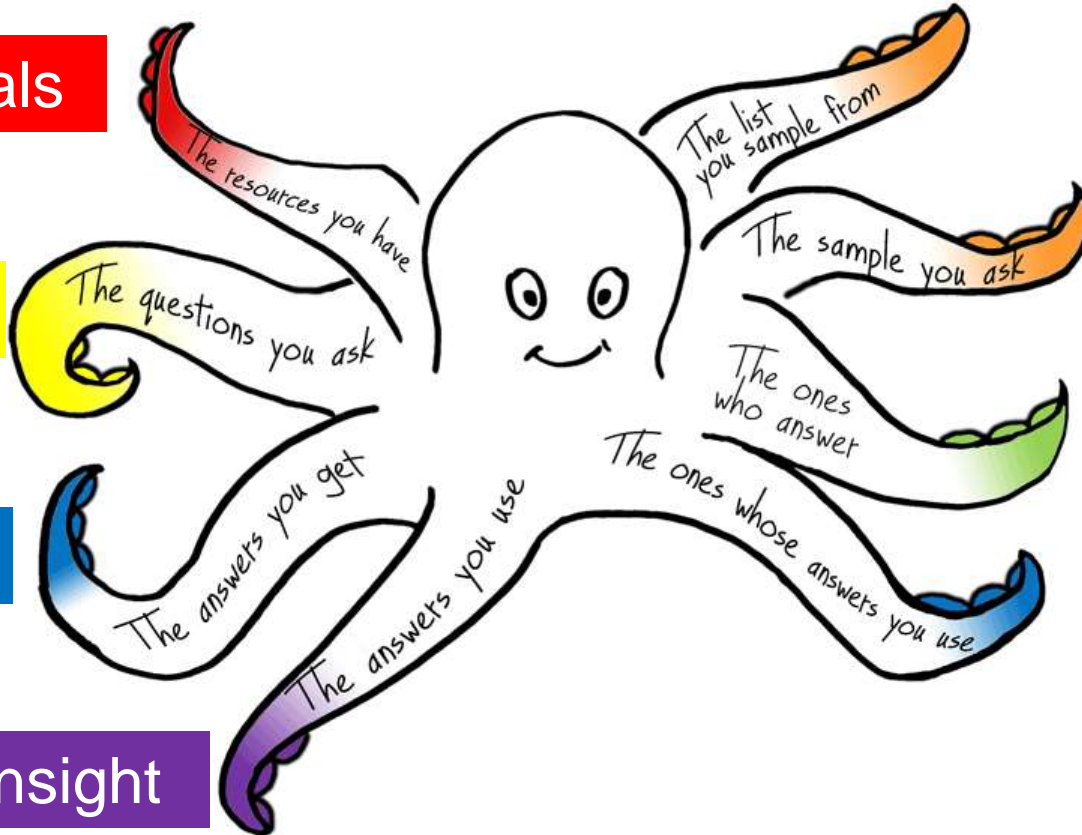
Response

Insight

Sample

Fieldwork

Response



2015 mindset: the Light Touch survey

- Choose ONE question
- Find ONE person
- Ask the question, face-to-face
- See if you can make ONE decision
- Improve, iterate, increase





Leisa Reichelt

Published

July 16, 2014

in strategic ux

Death to 'it depends'

Lately I find myself on a mission for mass simplification. Possibly over simplification, but I'm not sure it matters.

It's one of the things I care most about at the moment – how can we simplify what we are asking people to do so that there is nothing else they can do but start doing it, instead of following their natural inclination to make a list, hire a consultant, write a white paper, do anything but doing the thing.

It requires that I stop saying (or even thinking) one of the things I have probably said most in my entire working life – 'it depends'. That's hard, but I think it's the right thing to do.

It depends is paralysing.

Light Touch Survey = easier choices + iteration

Goals

Questions

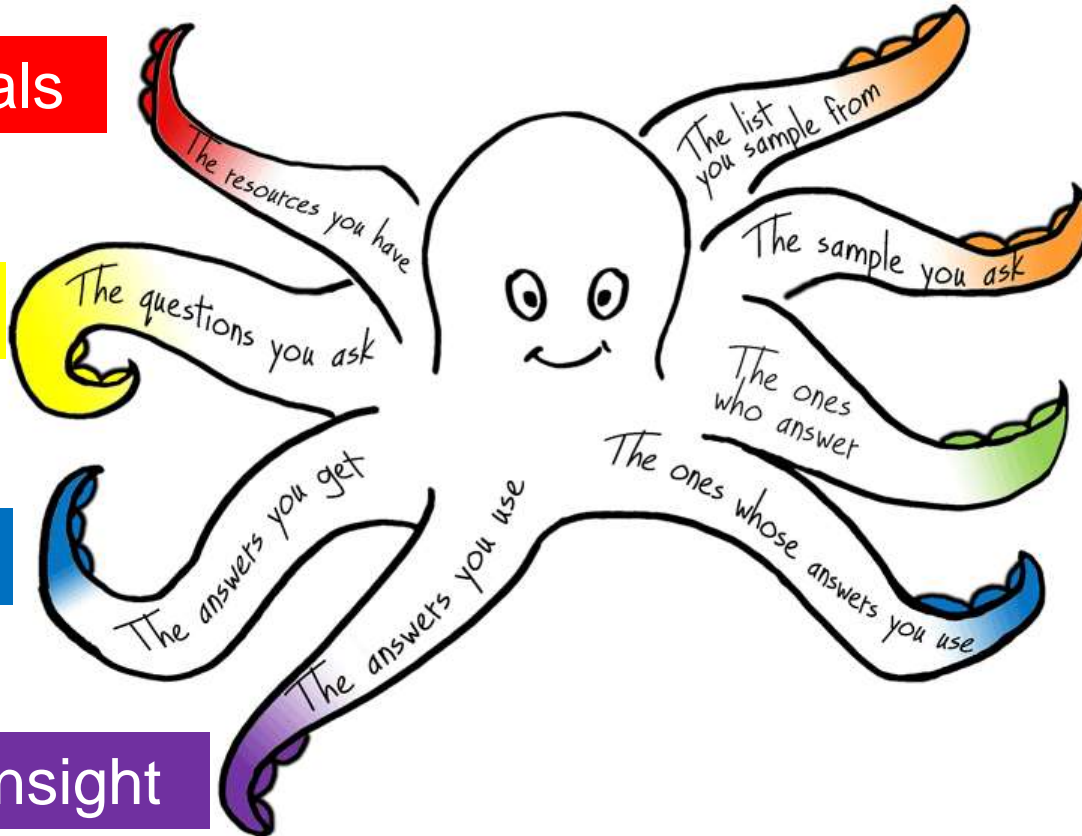
Response

Insight

Sample

Fieldwork

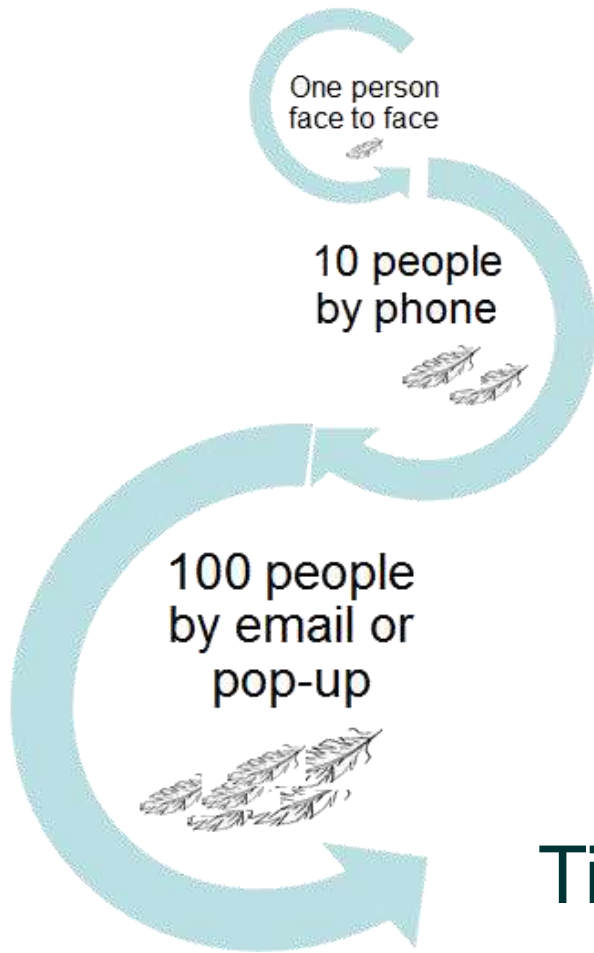
Response



From goals to insight - quickly

- Choose ONE question
- Find ONE person
- Ask the question, face-to-face
- See if you can make ONE decision
- Improve, iterate, increase





One way to
iterate,
improve,
increase

People ask me about surveys

“Please have a look at this survey”

“How many people do I need in my sample?”

“Tell me whether this is a good question”

“I prefer 5 points in a rating scale, but my boss likes 7.
Who’s is right?”

Likert had several different types of question in his response formats

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

Krosnick and Presser refer to over 80 papers

	True	False
I usually get what I want in life.	<input checked="" type="radio"/>	<input type="radio"/>
I need to be kept informed about news events.	<input type="radio"/>	<input type="radio"/>

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	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	

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.
[http://comm.stanford.edu/faculty/krosnick/docs/2010/2010 Handbook of Survey Research.pdf](http://comm.stanford.edu/faculty/krosnick/docs/2010/2010%20Handbook%20of%20Survey%20Research.pdf)

Respondents focus on the actual 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)

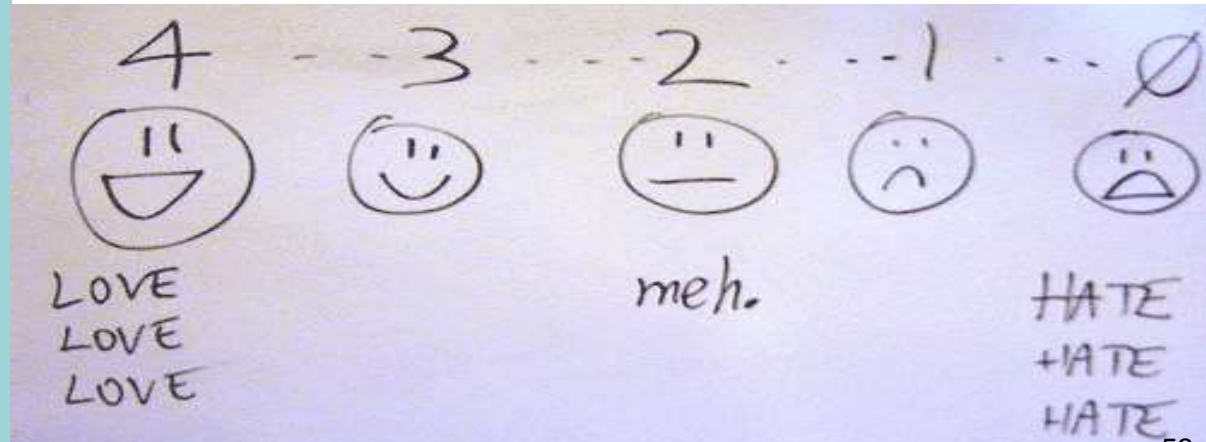
Undecided
(3)

Disapprove
(2)

Strongly
Disapprove
(1)

Tip

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



Well, OK, stress a little bit.

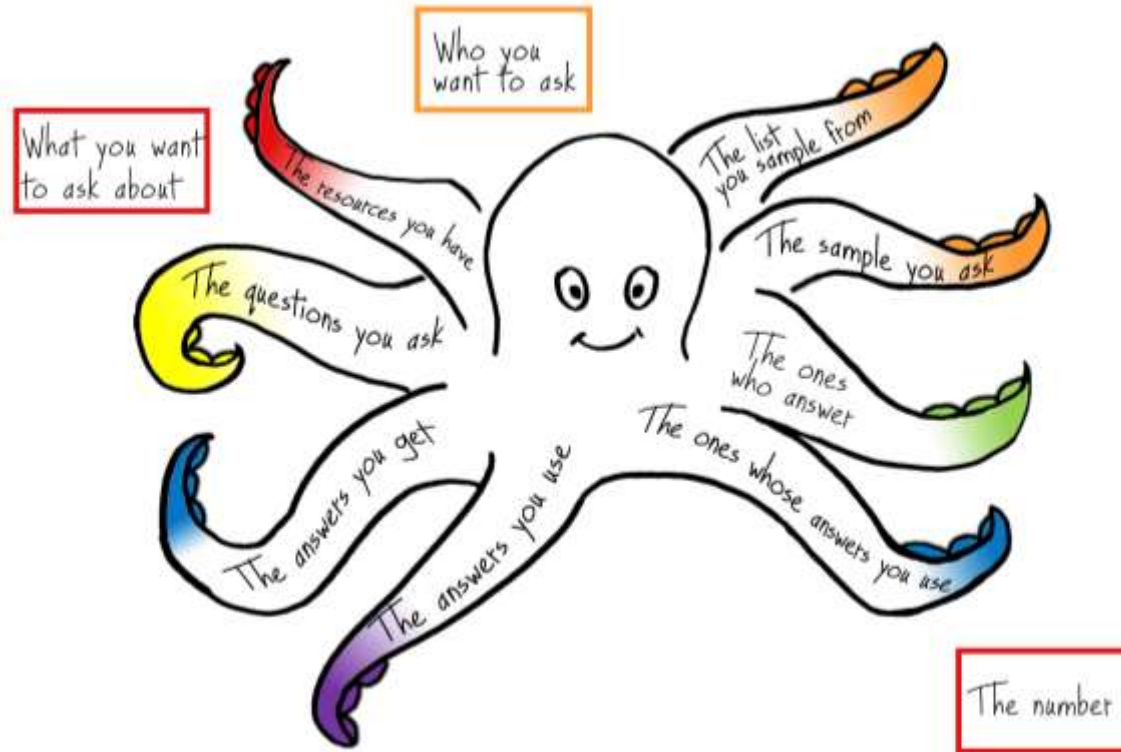
Based on today's visit, how would you rate your experience on the *Harvard Business Review* site overall?



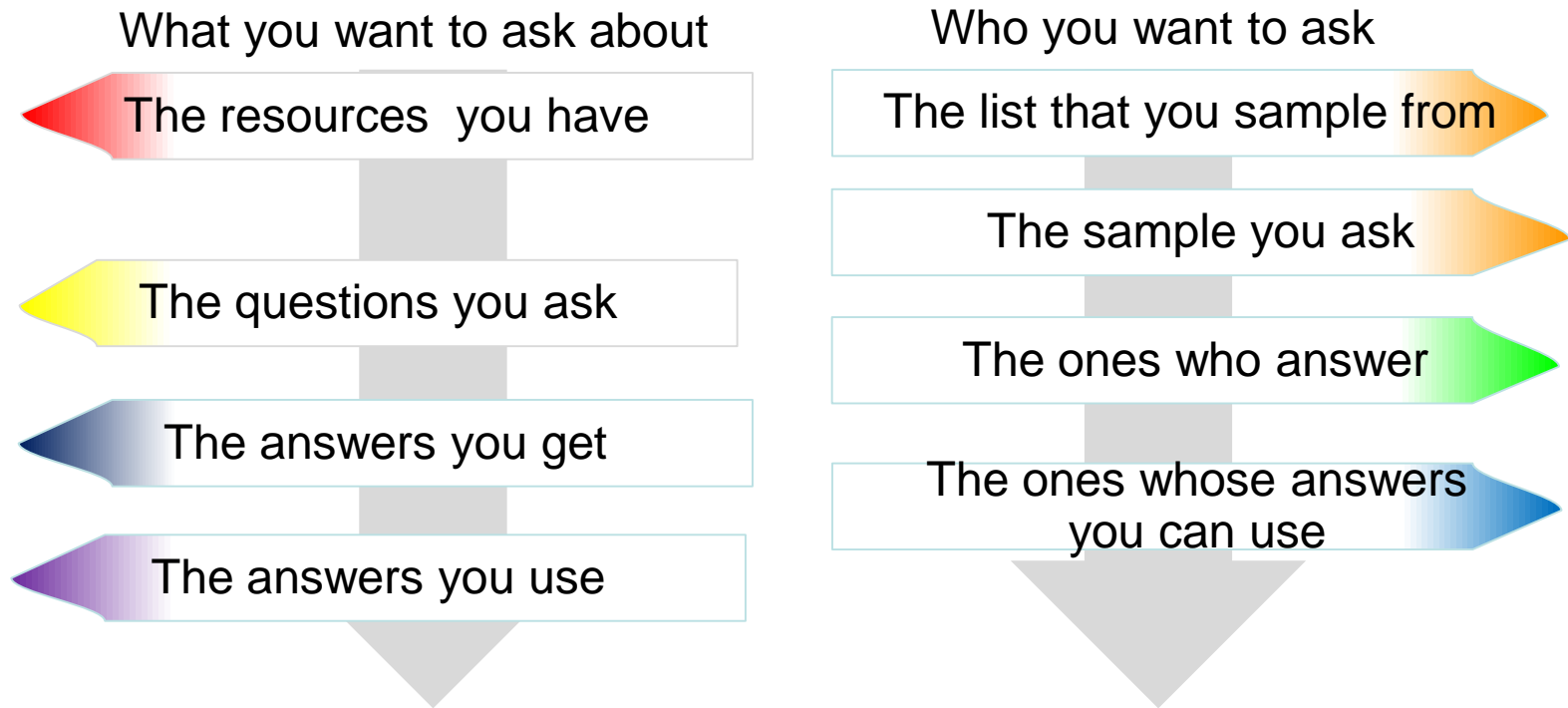
This scale is
downright peculiar.
Avoid.

What about the 'valid results' bit?

The aim is to get the best number you can, within the resources you have



The aim is to get the best number you can, within the resources you have



The aim is to get the best number you can, within the resources you have

What you want
to ask about

The resources
you have

The questions
you ask

The answers
you get

The answers
you use

Who you want
to ask

The list you use
to sample from

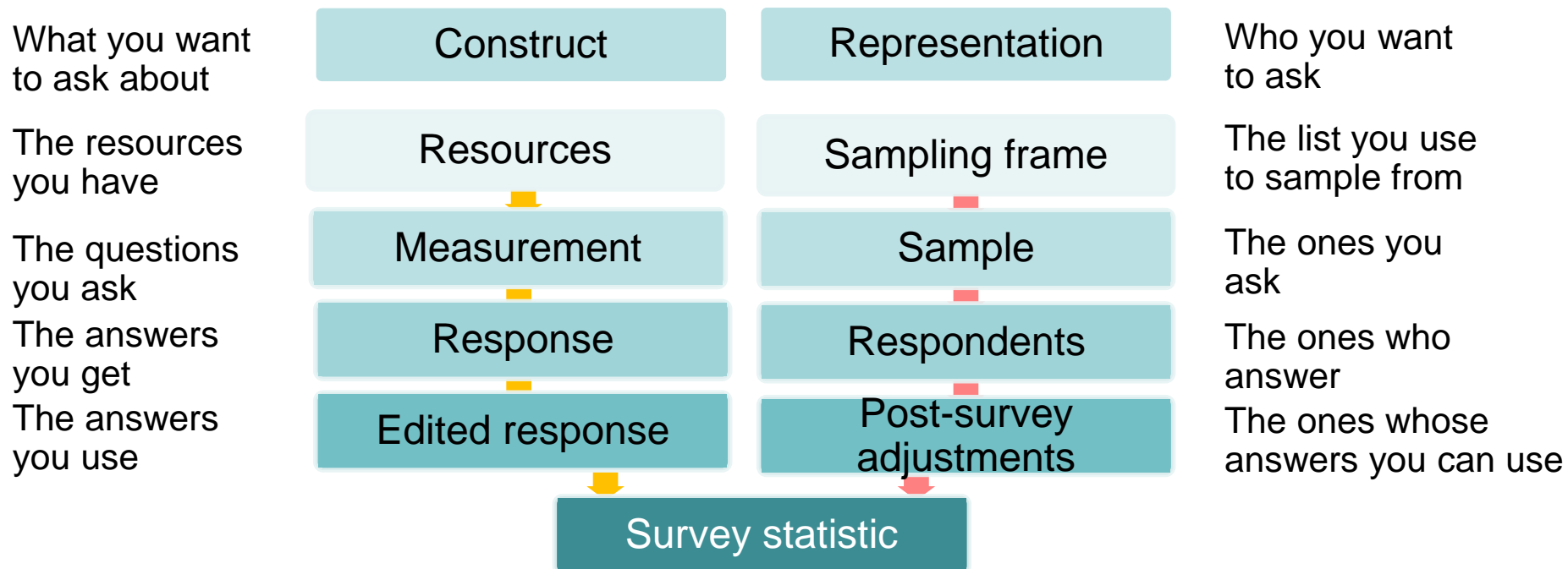
The ones you
ask

The ones who
answer

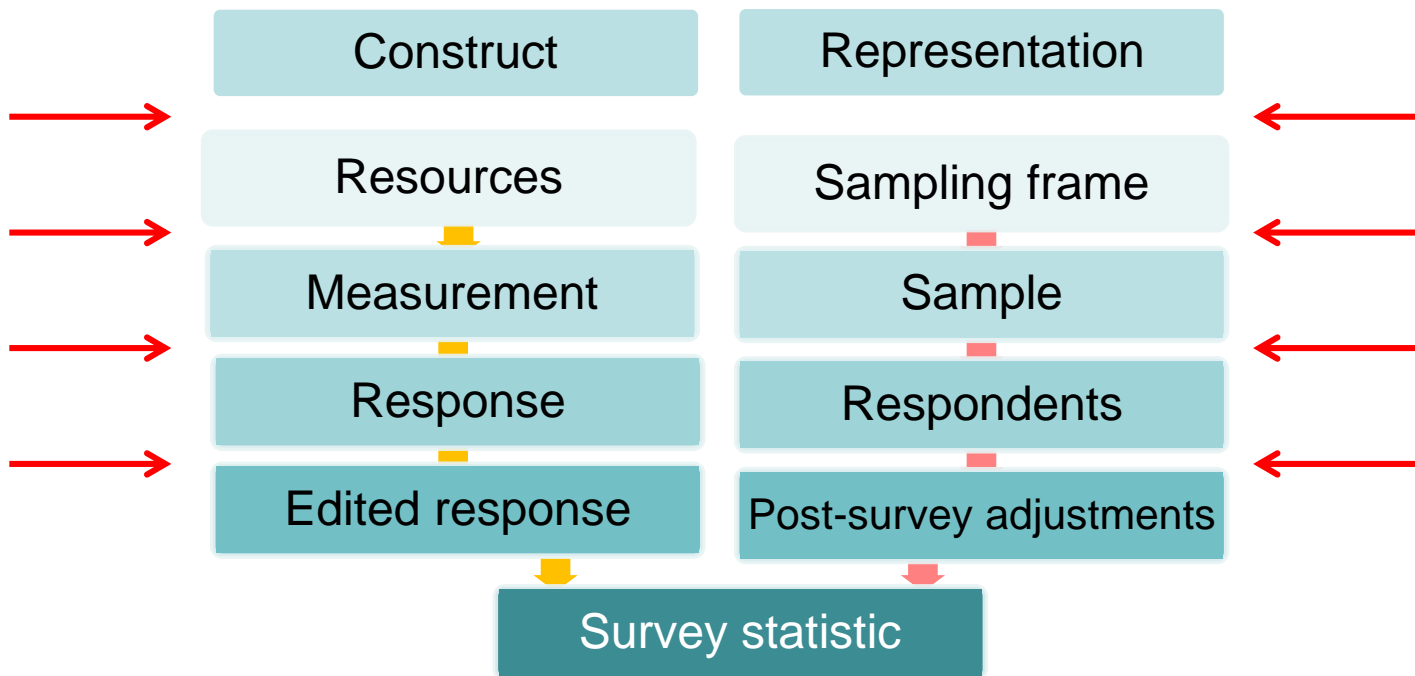
The ones whose
answers you can use

The number

The aim is to get the best number you can, within the resources you have



By making good choices, you minimise the error



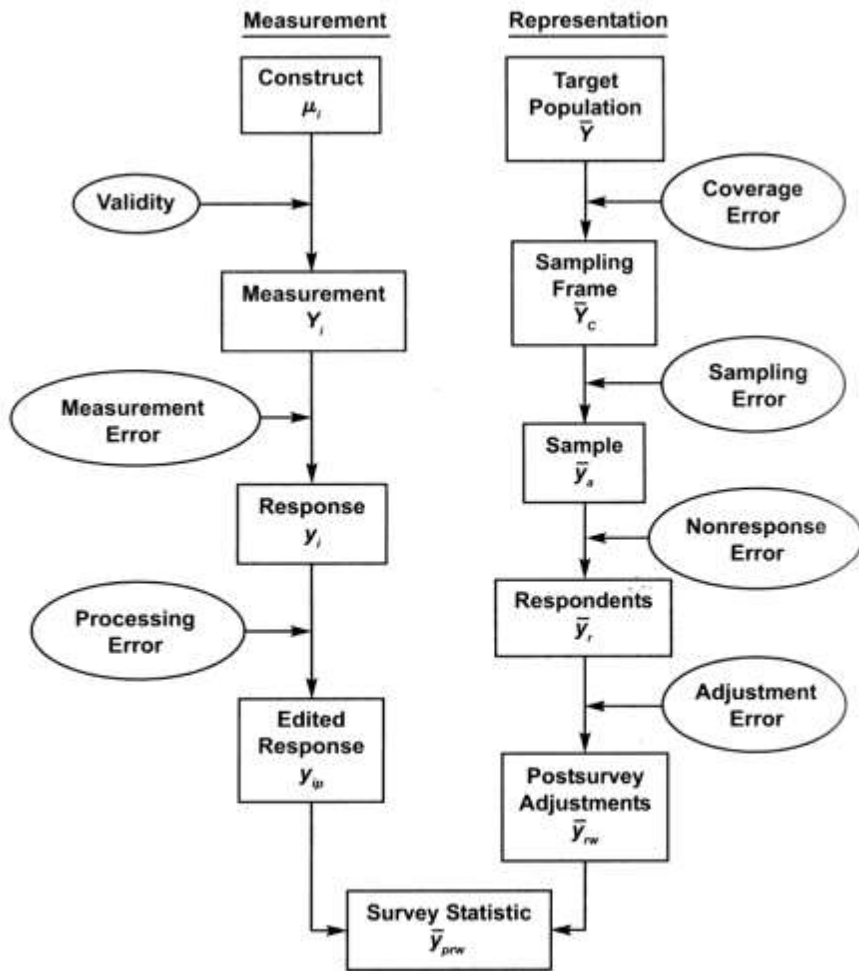


Figure 2.5 Survey life cycle from a quality perspective.

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.

What number do you need to make the decision?

Use your UX skills
(especially technical communication)

Go for Light Touch surveys

Use the Survey Octopus to make good choices

Caroline Jarrett

Twitter @cjforms

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

carolinej@effortmark.co.uk

