

Surveys that work

An introduction to using
Total Survey Error in practice

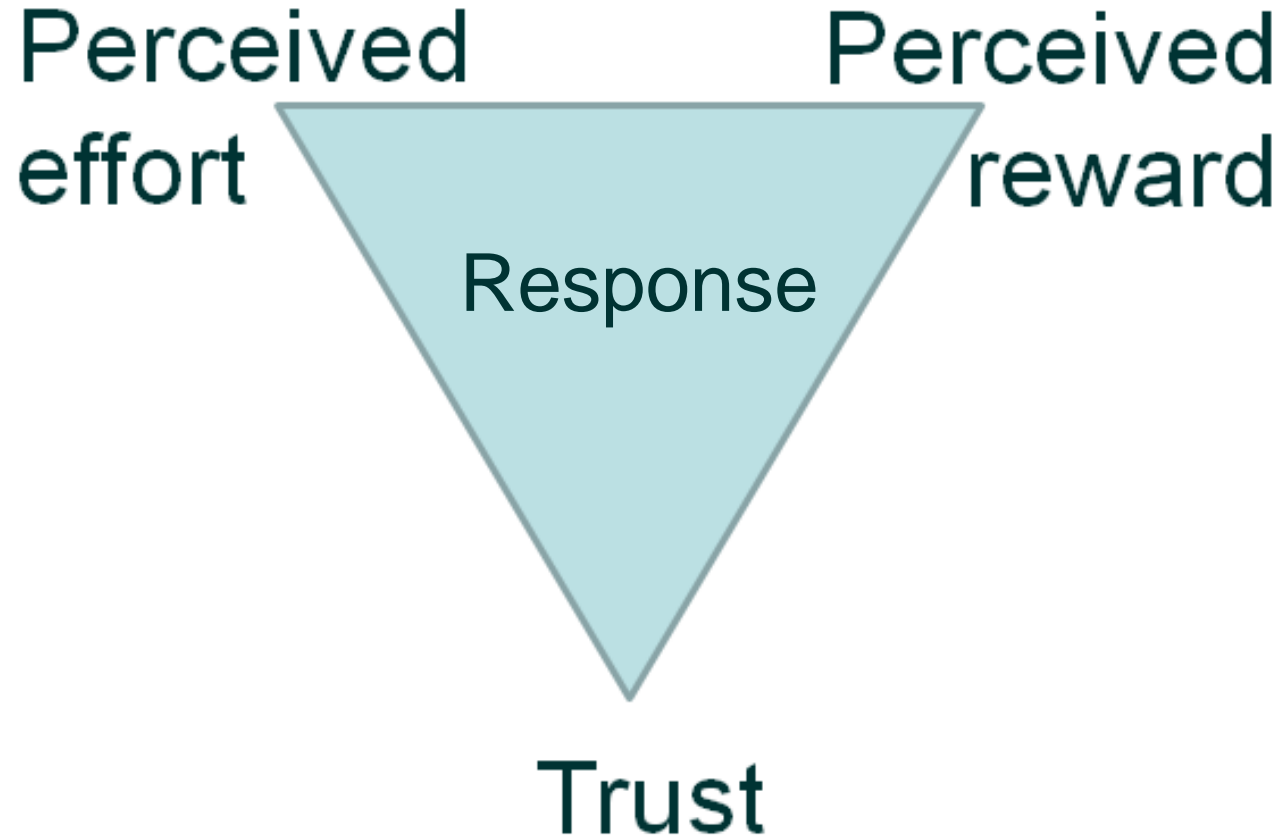
Caroline Jarrett
@cjforms
#UXInsights2020



What would you do for a dollar?

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





Would you
answer this
survey?

Luton Business Survey 2011 - YOUR HELP IS NEEDED

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

Sent: Mon 06/06/2011 09:49

To:

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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](#)

Why do people answer questions?



I'm the forms specialist



People ask me about surveys

“Please have a look at this survey”

“Tell me whether this is a good question”

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

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

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.

I change the definition a bit

systematic method	becomes	process
gathering information	becomes	ask questions
entities	become	people
quantitative descriptors	become	numbers
attributes of the larger population	becomes	make decisions

The survey is a process
for getting answers to questions
from (a sample of) people
for the purpose of
getting numbers
that you can use to
make decisions

To make decisions

People

The survey is a
process for getting
answers to questions

getting numbers

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

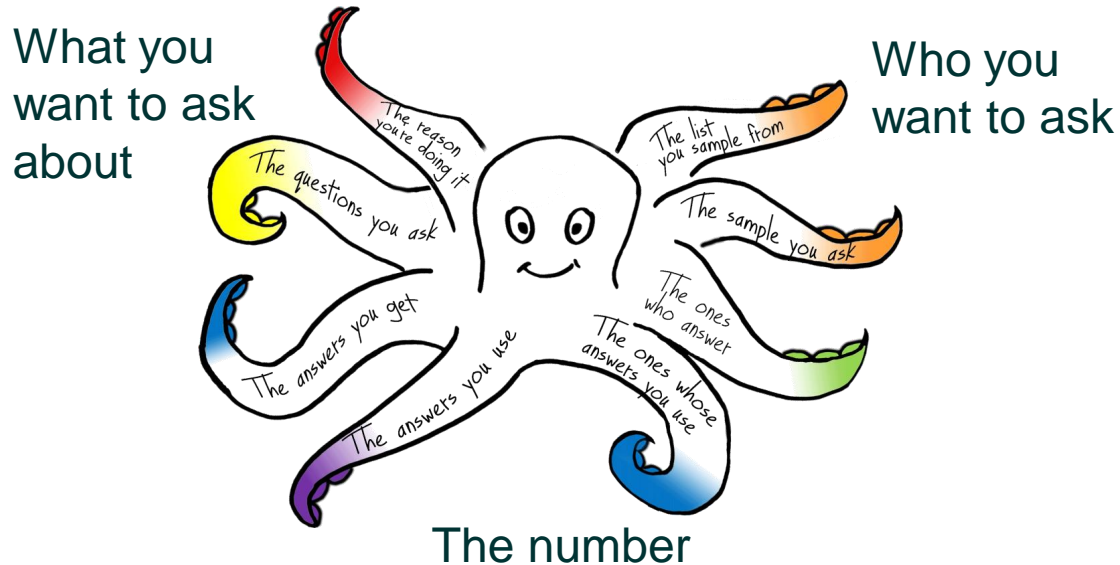
What you
want to ask
about

Who you
want to ask

The Survey

The number

The Survey Octopus has things to think about



There are steps in the process for each area

Goals

Questions

Questionnaire

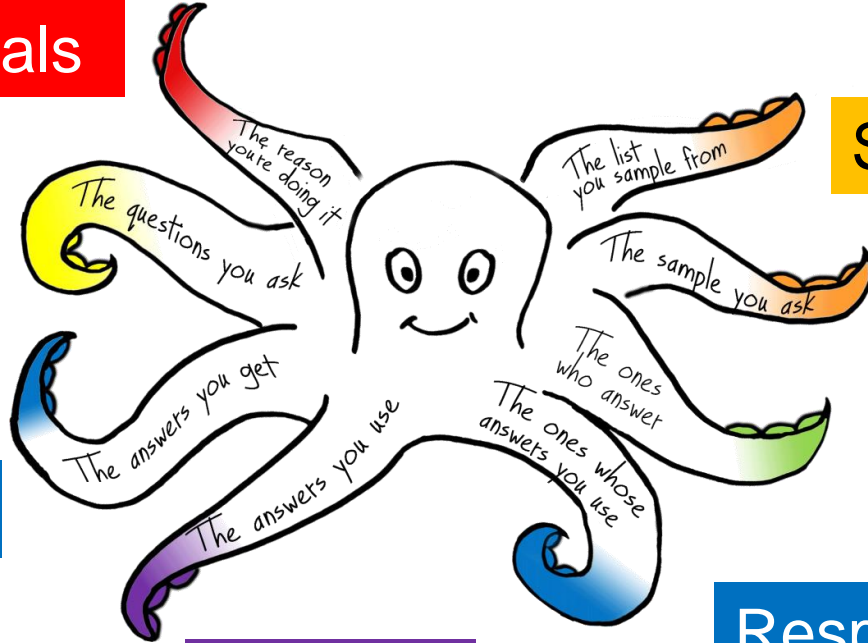
Response

Reports

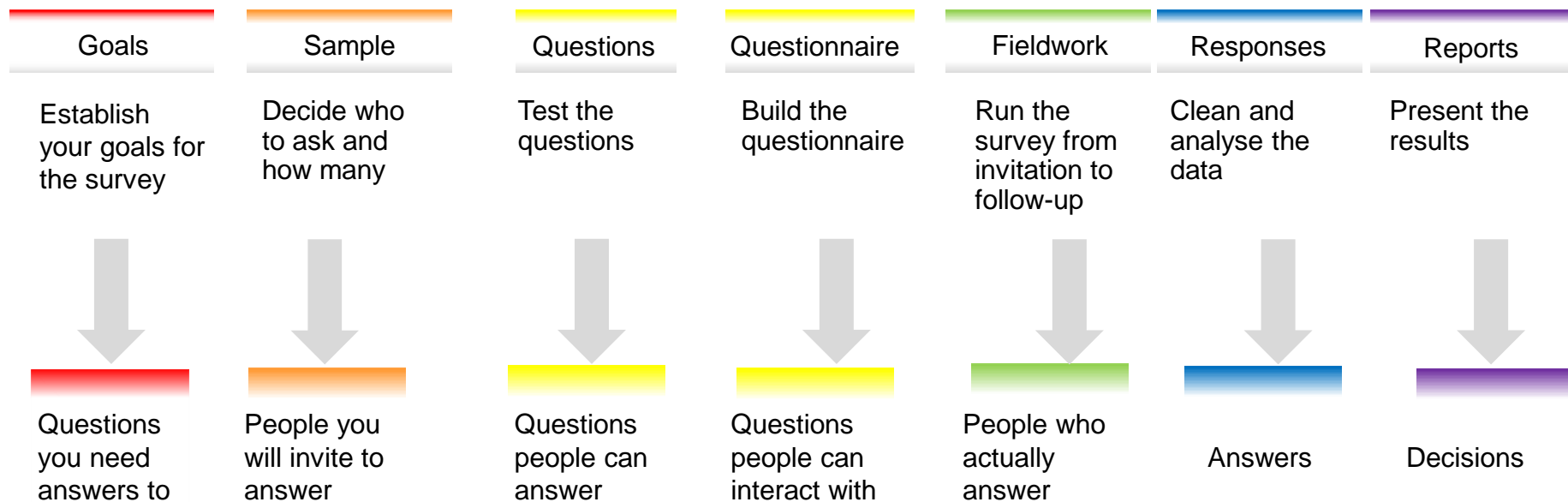
Sample

Fieldwork

Response



Here are the 7 steps as a linear process



People ask me about surveys

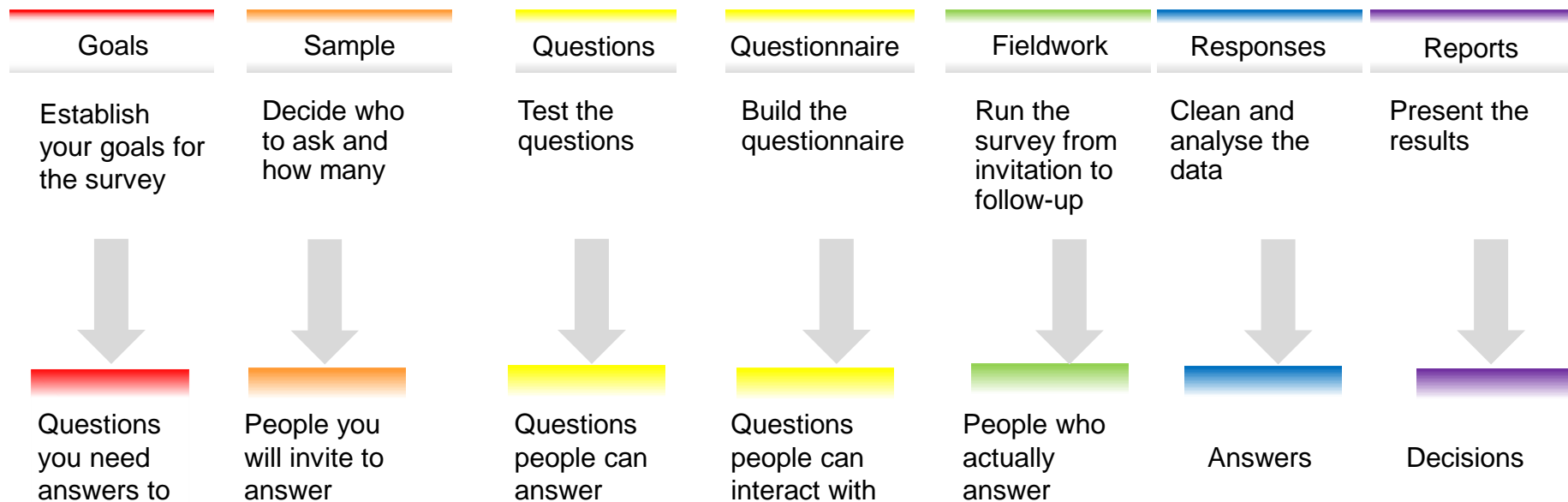
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Who is right?”

Here are the 7 steps as a linear process



I have to know about goals first

Goals

Establish
your goals for
the survey



Questions
you need
answers to

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

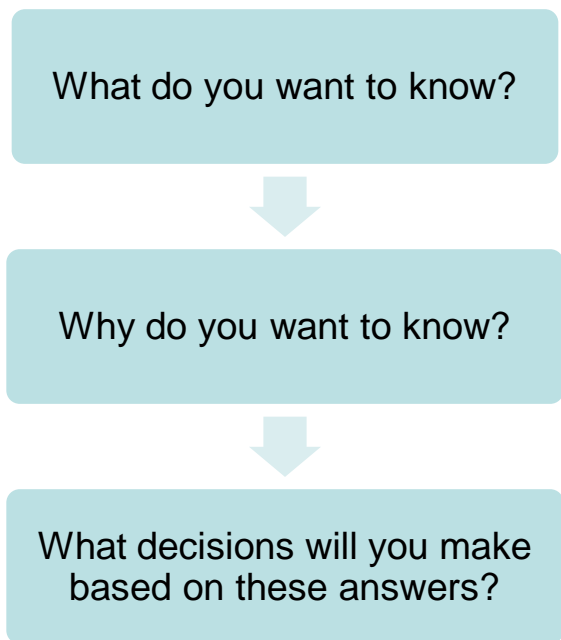
What you
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The number

Establish your goals for the survey



People ask me about surveys

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Is this a good question?

Would you recommend us to
a friend or family member?

“Recommend to friend/family” can be OK

	A shop selling clothes	A hospital ward
What do you want to know?	Whether they will recommend	????
Why do you want to know?	To compare numbers over time	Because someone said they had to ask
What number do you need to make a decision?	Some good reasons (investigate and fix problems) Some bad ones (punish staff)	???? What decision?

People ask me about surveys

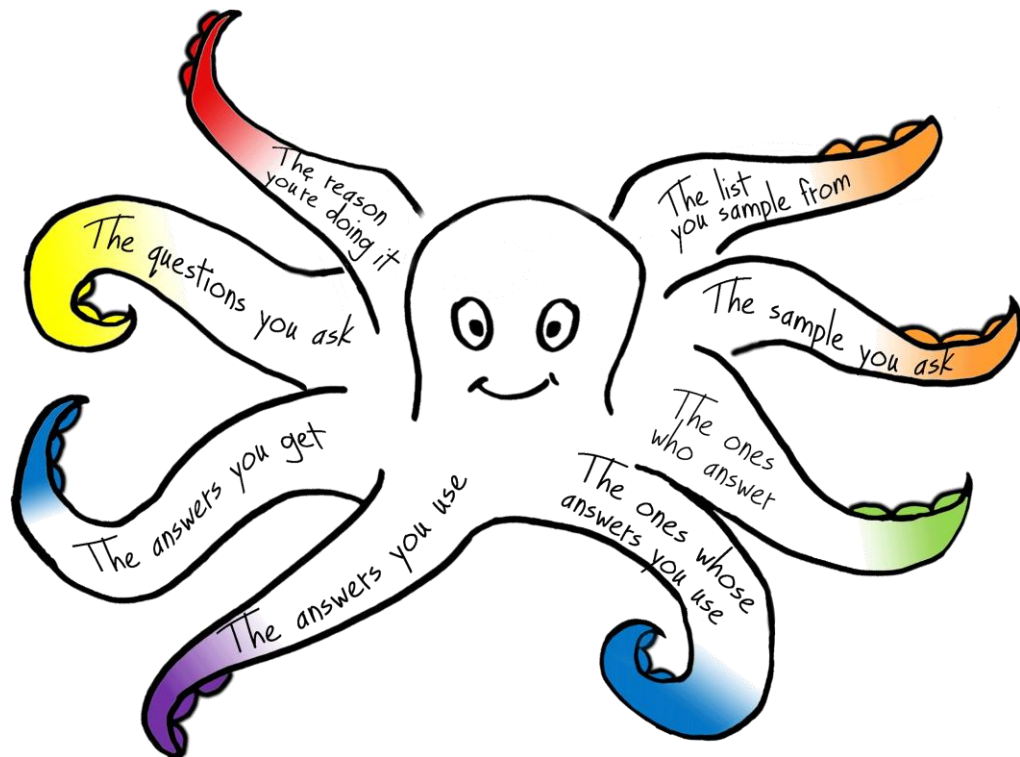
“Please have a look at this survey”

“Tell me whether this is a good question”

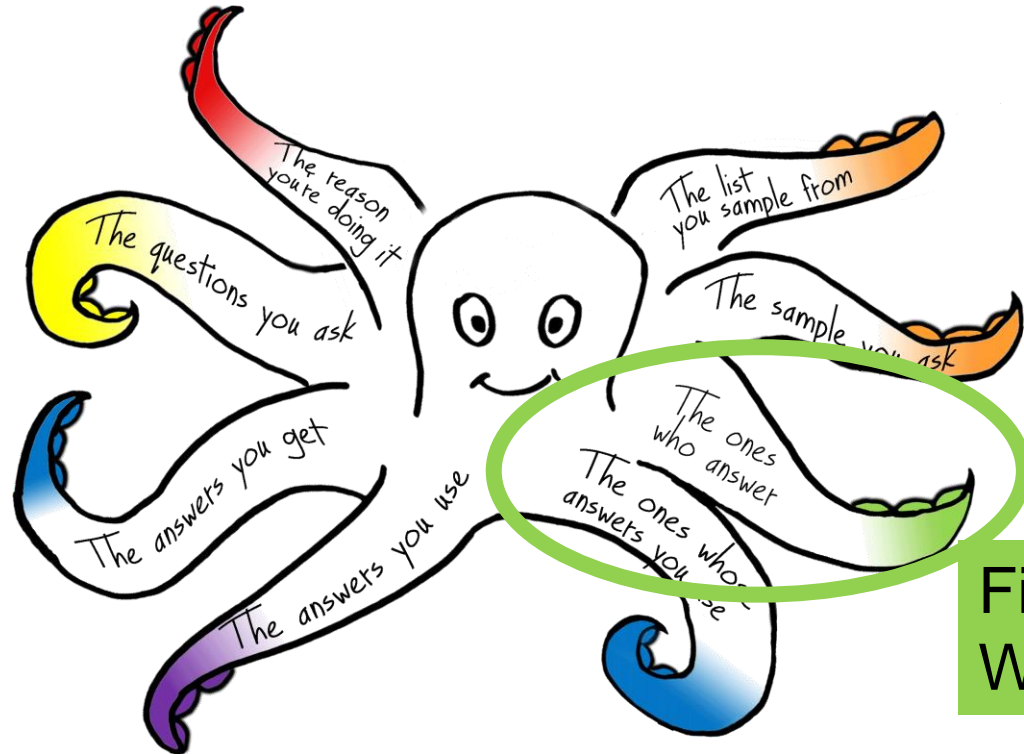
“How many people do I need in my sample?”

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

To work that out, let's visit the Octopus

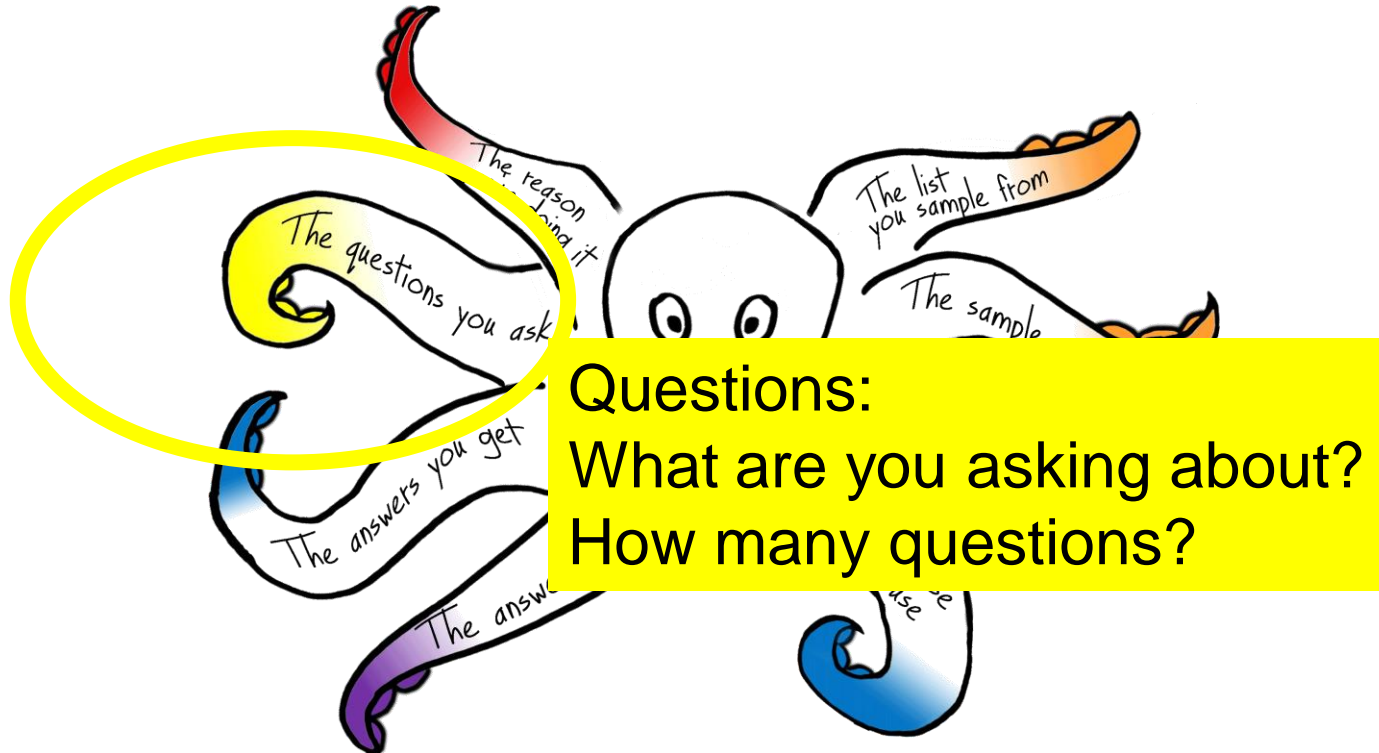


Start with how many will answer



Fieldwork:
Who answers?

Whether they'll answer depends on effort



And on the reward you're offering



Goals:

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.

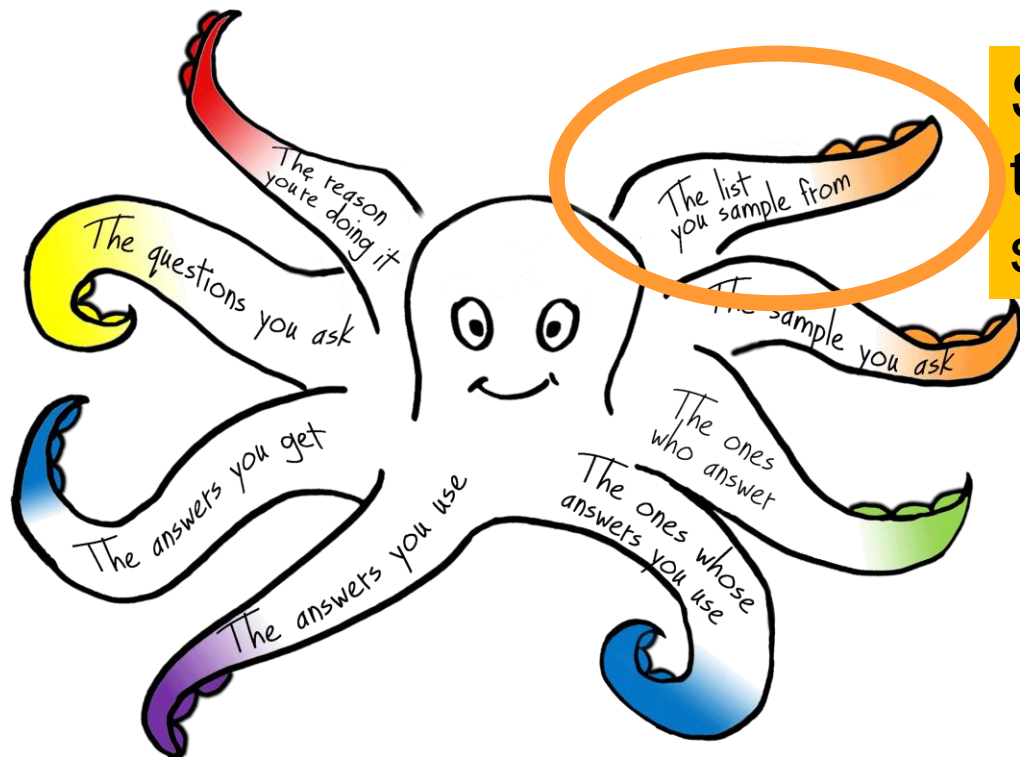
There are now almost half a million votes to send the singer to the secretive communist nation.

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



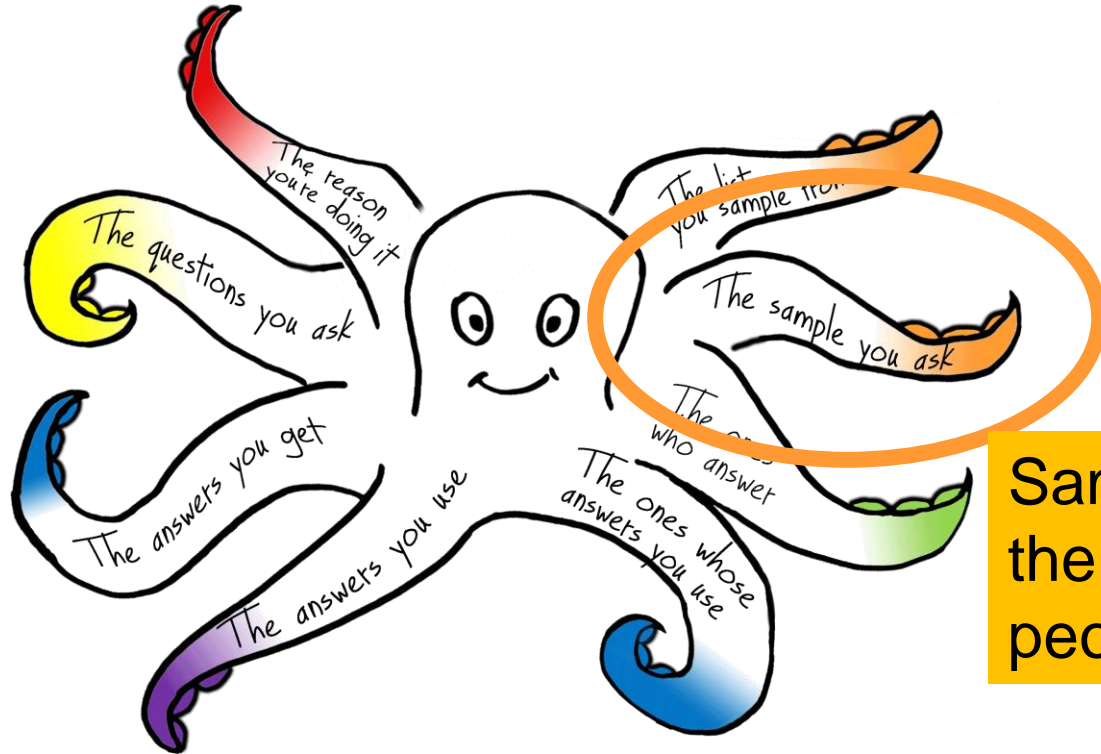
It is highly unlikely Bieber would be given permission to enter North Korea

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

The response rate varies

It depends on

- Why you're asking
- What you're asking and the type of questionnaire you make
- Who you're asking
- How you're asking

Goals

Questions

Questionnaire

Sample

Fieldwork

People ask me about surveys

“Please have a look at this survey”

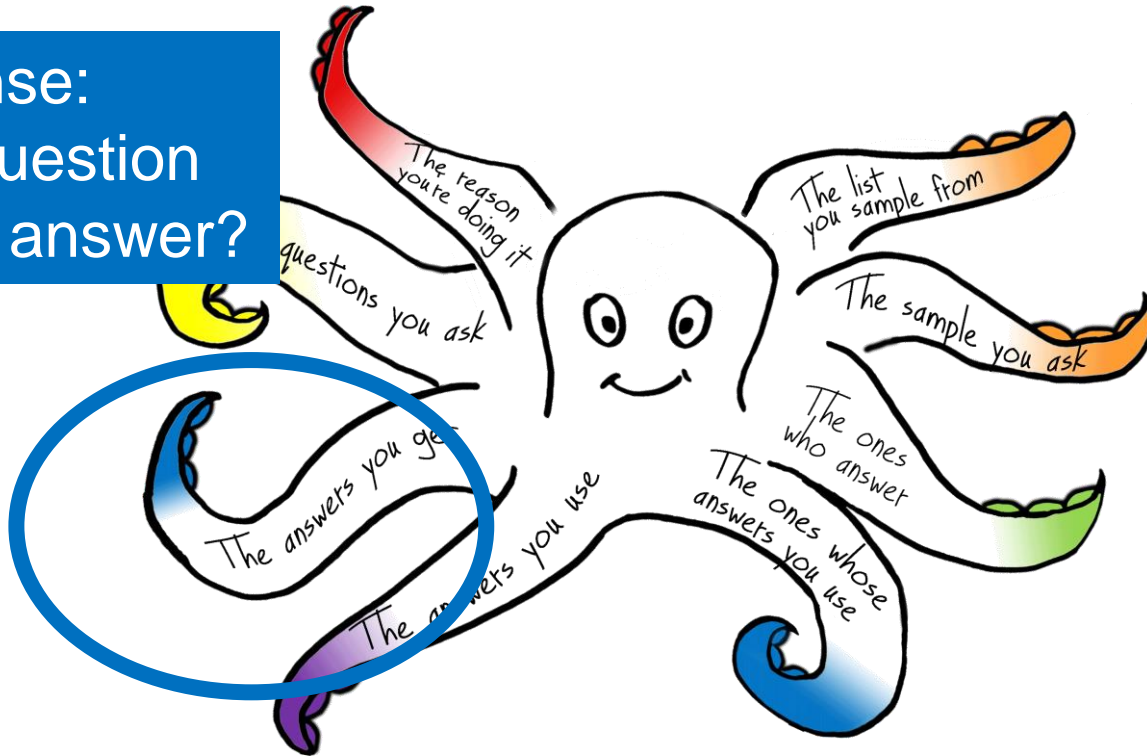
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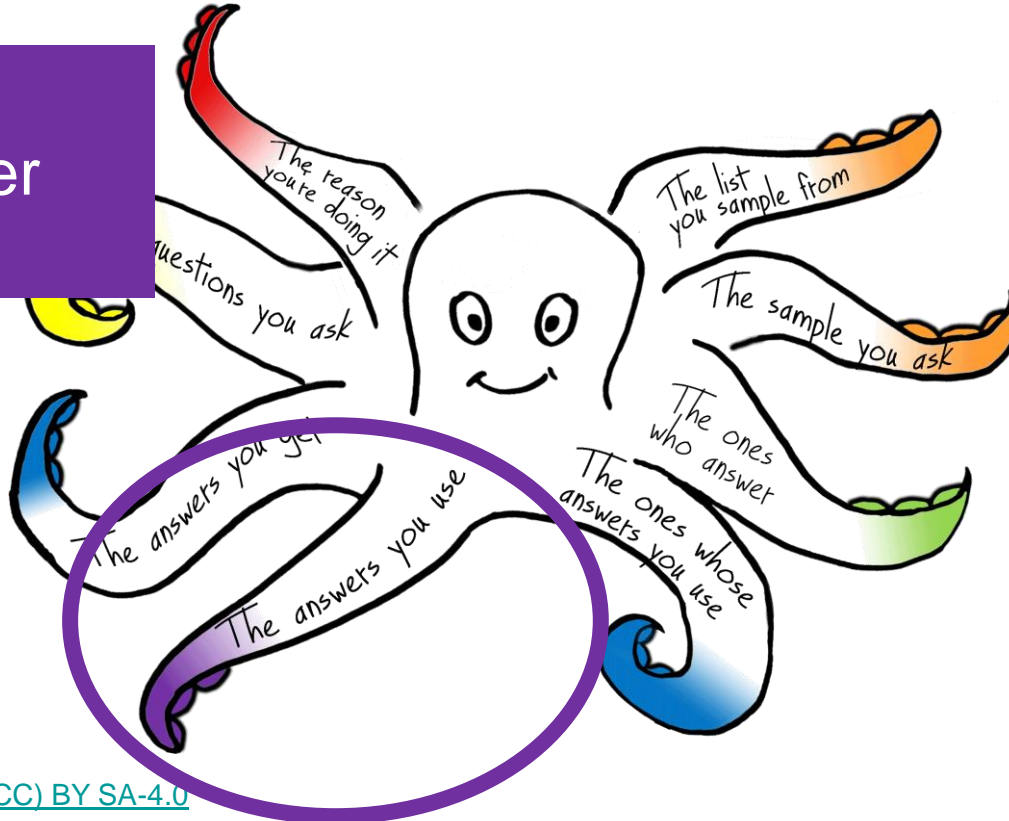
A good question gets good answers

Response:
Is the question
easy to answer?



Good answers help you to make decisions

Reports:
Is the answer
useful?



Likert had several different types of question in his response formats

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)

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)

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.
https://web.stanford.edu/dept/communication/faculty/krosnick/docs/2009/2009_handbook_krosnick.pdf

Let's try this question. Pick your answer.

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)

People focus on the actual question

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

1=Poor

Excellent=10

1

2

3

4

5

6

7

8

9

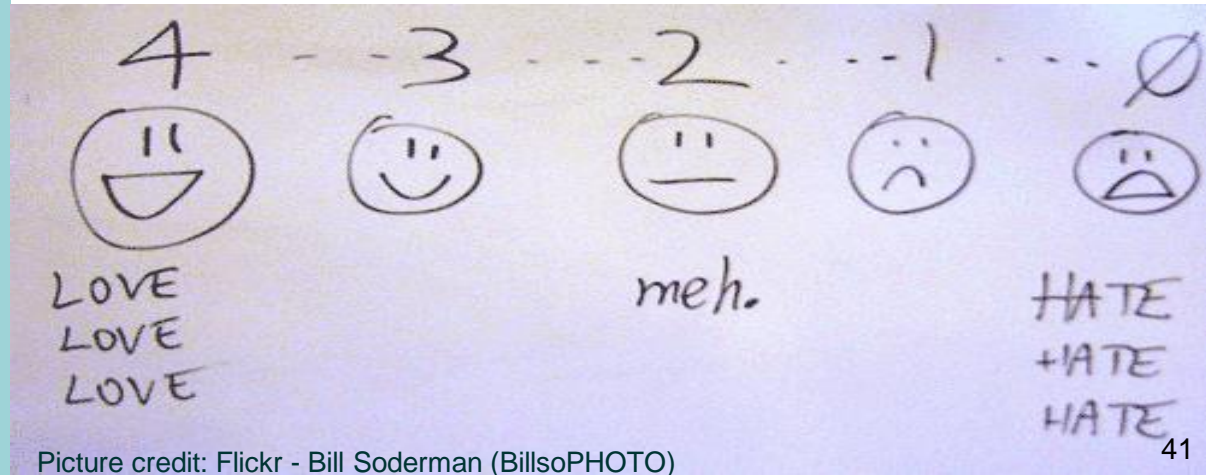
10

Don't Know



Tip

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



Well, OK, stress a little bit.

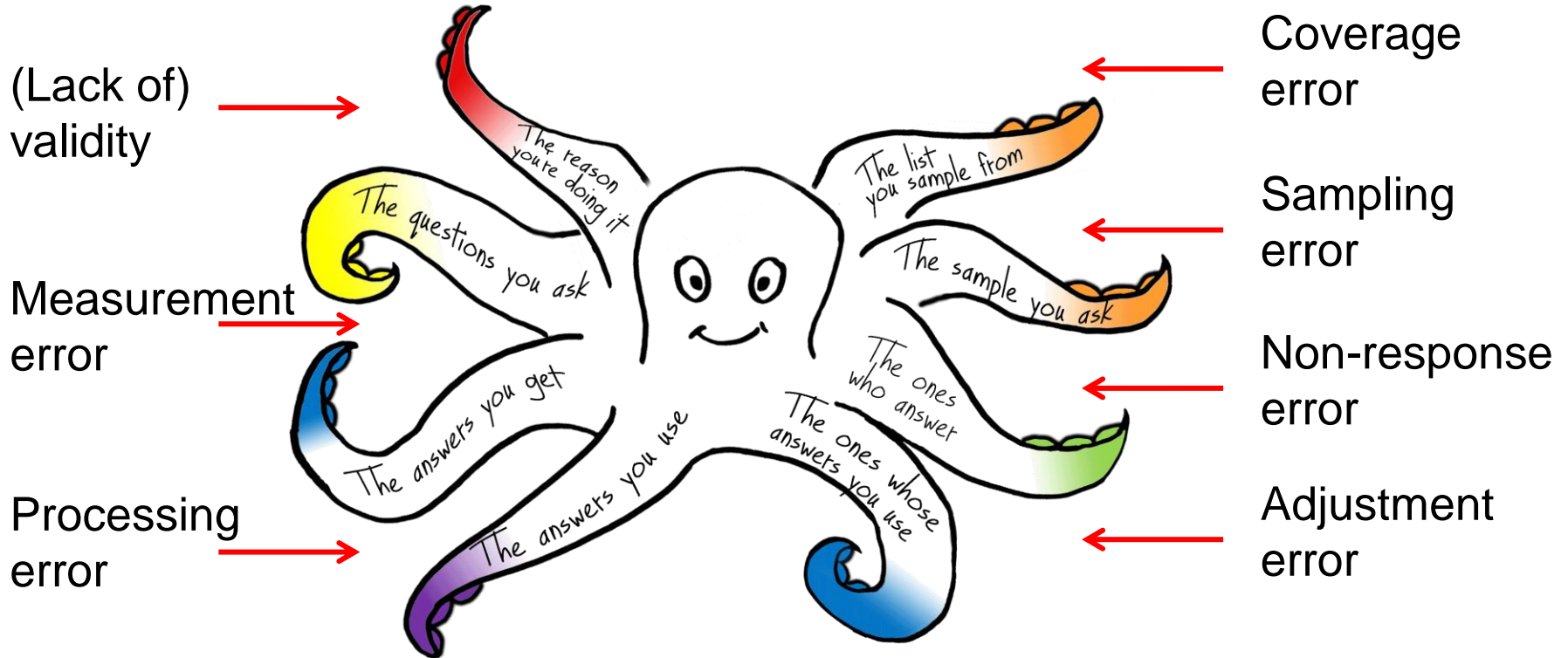
Based on today's visit, how would you rate your experience on the *Harvard Business Review* site overall?



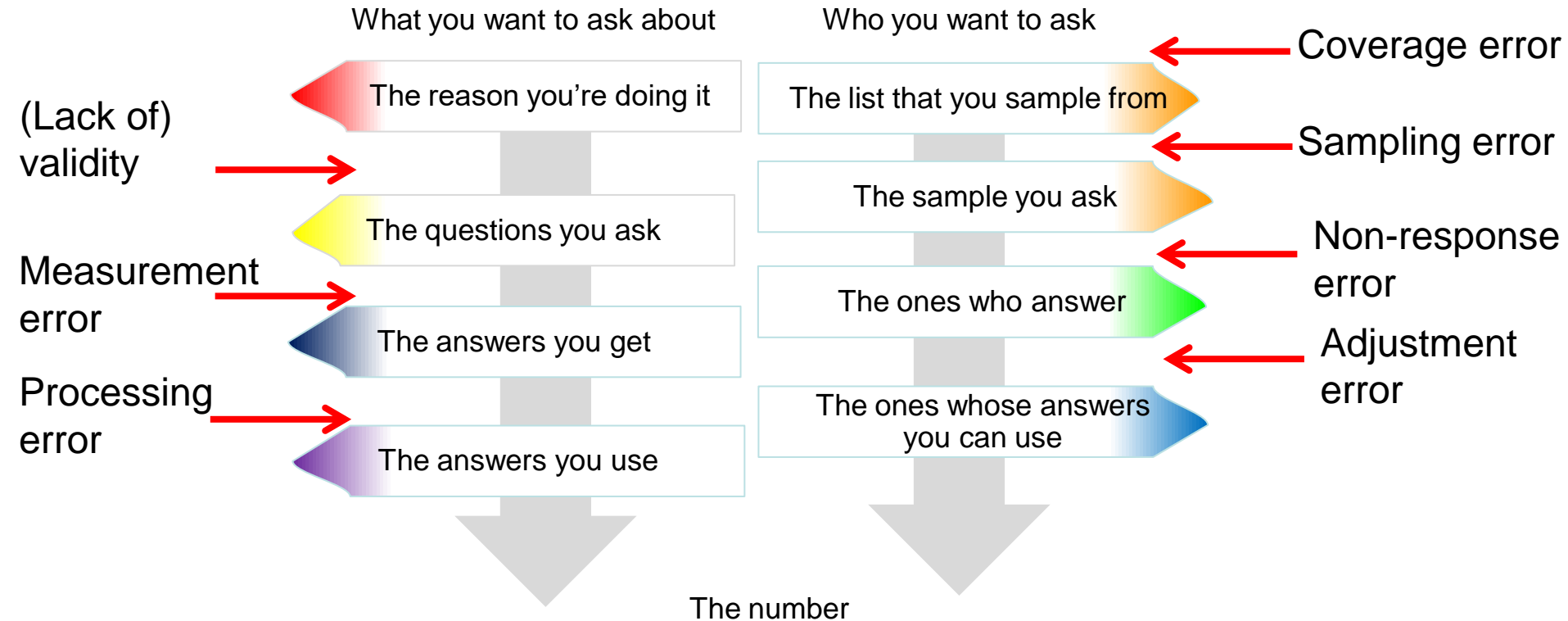
This scale is
downright peculiar.
Avoid.

Let's look at all the errors

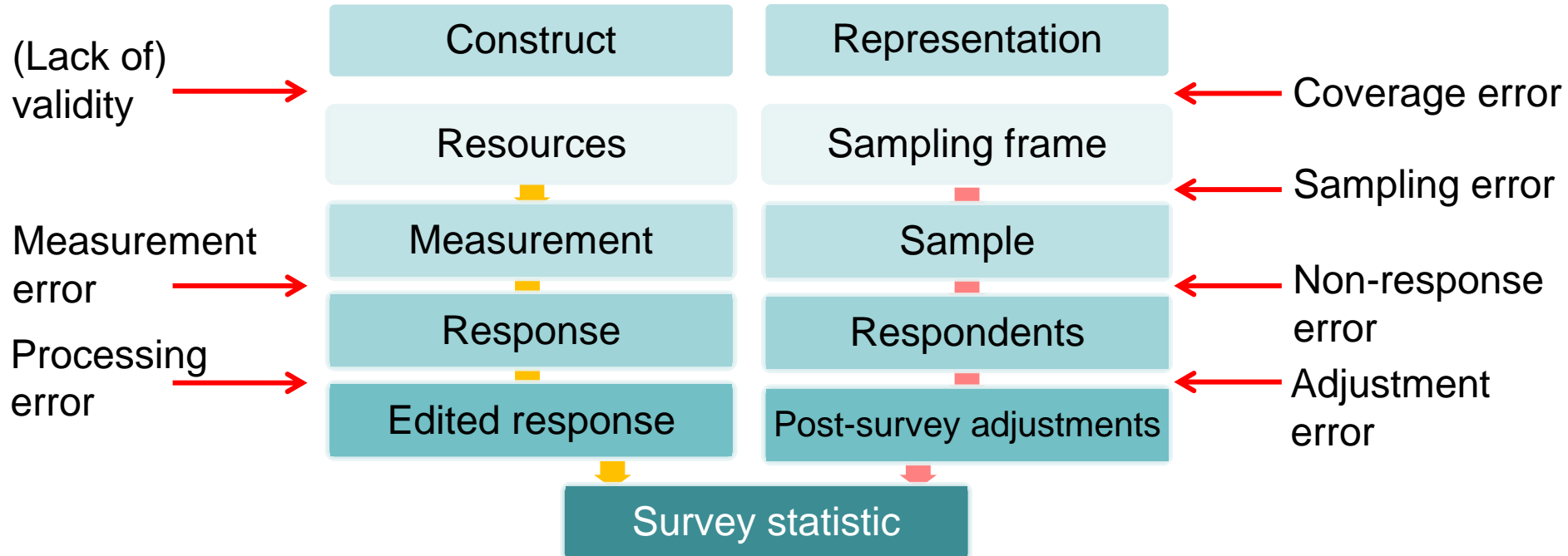
There are errors all around the Survey Octopus



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



This version uses terms from survey methodology



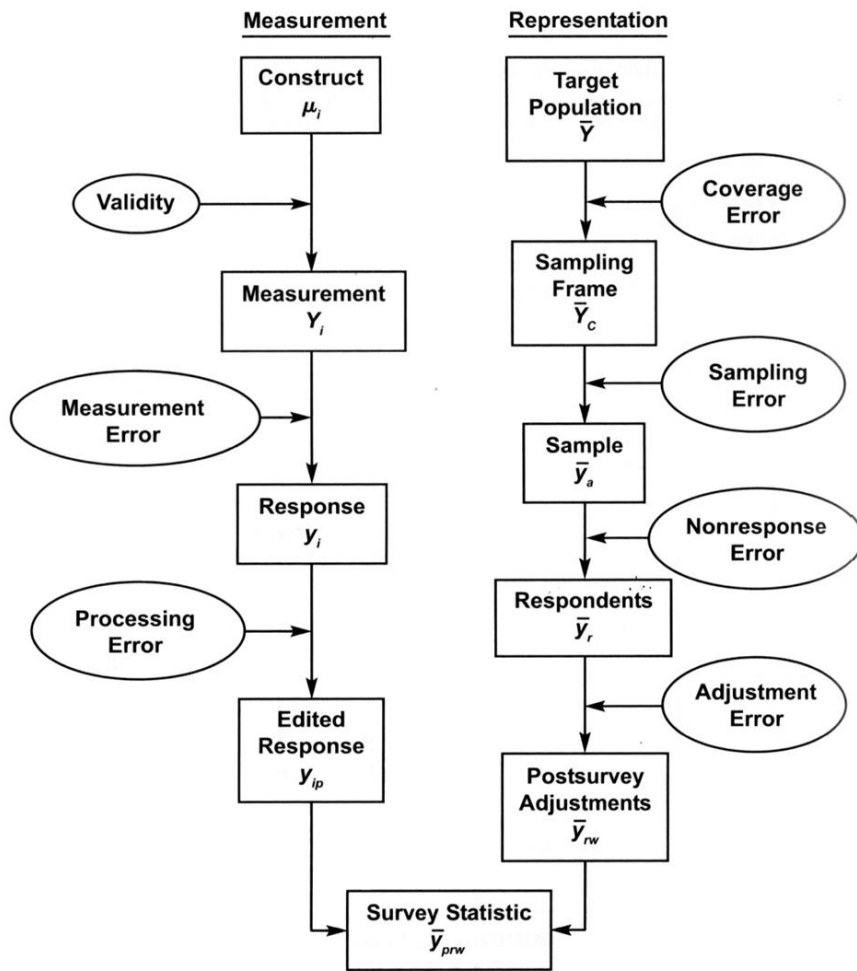


Figure 2.5 Survey life cycle from a quality perspective.

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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