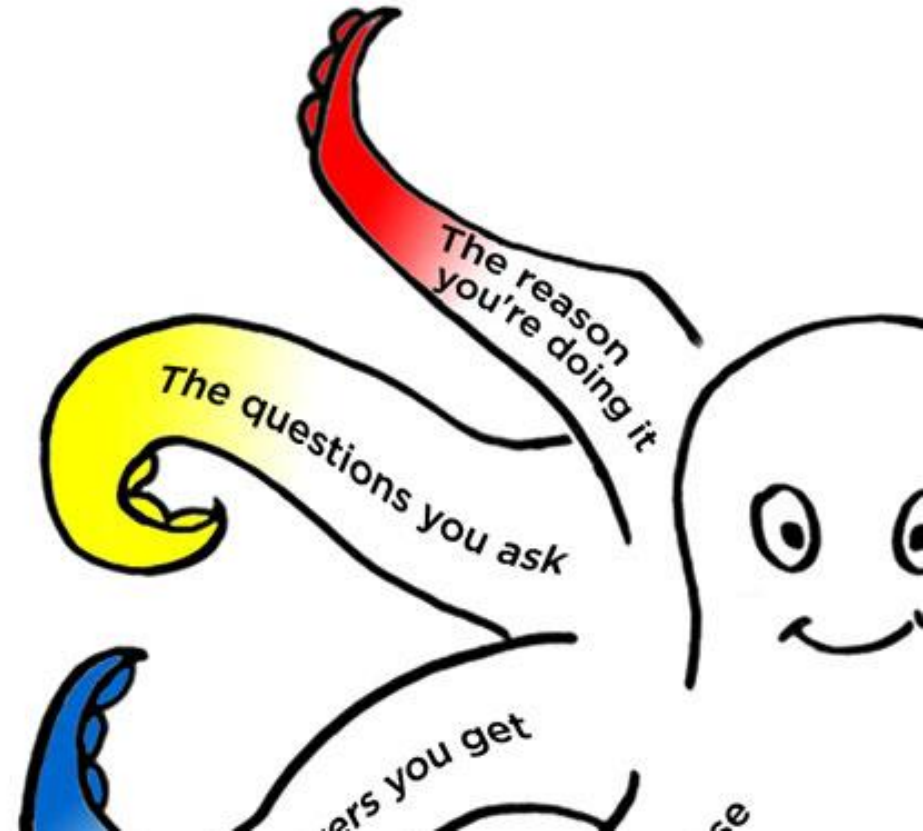


# Surveys that work

## Session 2 of 3

An introduction to  
the Survey Octopus  
and Total Survey Error

Caroline Jarrett  
@cjforms  
#surveysthatwork2022



# Yesterday included representativeness (and this)



## Opening page of the survey, no comment

# Calling all UK Designers, Architects, and Engineers

Design Economy 2021 is Design Council's most ambitious research project to date. This three-year programme – with its interactive, digital format – will be a growing resource for policy makers, business leaders, public sector professionals, architects and designers.

As well as assessing the **current state of design in the UK**, Design Economy 2021 will explore the role that design can play to 'build back better' and create a more just, healthy and regenerative world.

Over the months ahead, Design Council will be curating new data, evidence, stories and toolkits to champion design and further its use. **Readers will be invited to become co-researchers and collaborators**, rather than simply recipients of the research.

We'll have an ongoing **focus on equality, diversity and inclusion**, encouraging questions about how well design is responding to people's different wants and needs, its vital role in levelling up the UK's regional economies, and the changes needed to ensure that design works for everyone.

We want to make the Design Economy as representative of every designer as possible. Unfortunately, national datasets aren't always as inclusive as they could be. That's why we have decided to launch a new survey, to better understand who is a designer today, what their personal and professional backgrounds are, and what kind of design they practise.

***Some of these questions are quite personal, and you are able to skip any that you would prefer not answering.***

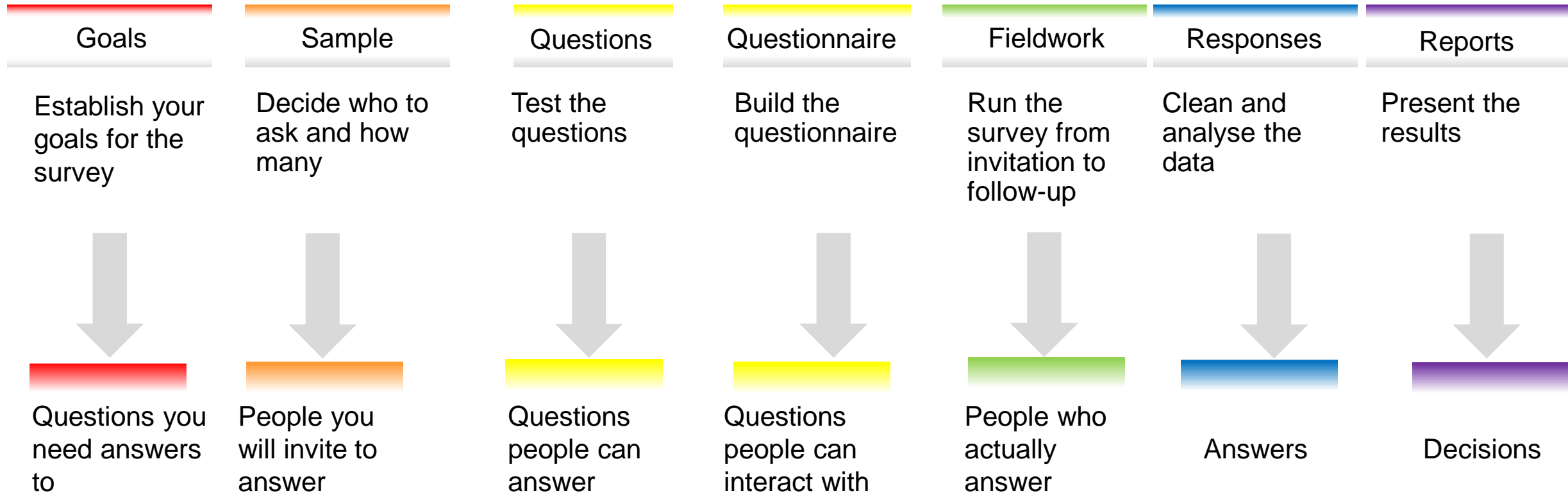
***\*\*IT TAKES ONLY FIVE MINUTES TO COMPLETE.\*\****

We will share all results of this survey in May 2022.

**When you've finished, could you forward this to other designers you know? We want to get as many responses from as many different designers as possible.**

*All the information we collect will be anonymised before data analysis, and will be kept confidential and secure in line with GDPR and our data privacy policy. If you want to get in touch with us about the survey, please contact [research@designcouncil.org.uk](mailto:research@designcouncil.org.uk).*

# Here are the 7 steps as a linear process



# Today is questions day

| Goals                               | Sample                         | Questions          | Questionnaire           | Fieldwork                                   | Responses                  | Reports             |
|-------------------------------------|--------------------------------|--------------------|-------------------------|---|----------------------------|---------------------|
| Establish your goals for the survey | Decide who to ask and how many | Test the questions | Build the questionnaire | Run the survey from invitation to follow-up | Clean and analyse the data | Present the results |
| Yesterday                           |                                | Today              |                         |   | Tomorrow                   |                     |

# Start with why and who; end with the number

Why you want to ask

Who you want to ask

The survey is a  
process for getting  
answers to questions

The number

# Yesterday we looked at numbers of people

Why you want to ask

Who you want to ask

Asking one  
person the  
right question

is better than

Asking 10,000  
people the  
wrong question

The number

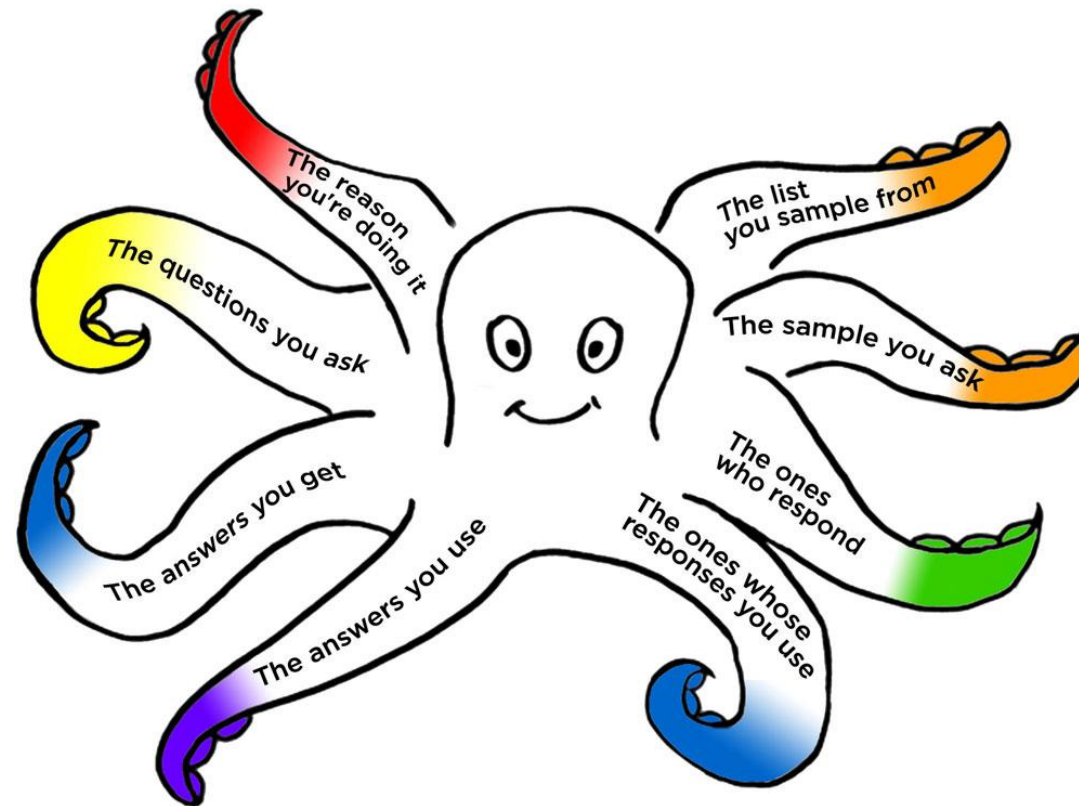
# Today we'll think about questions

Asking one  
person the  
right question



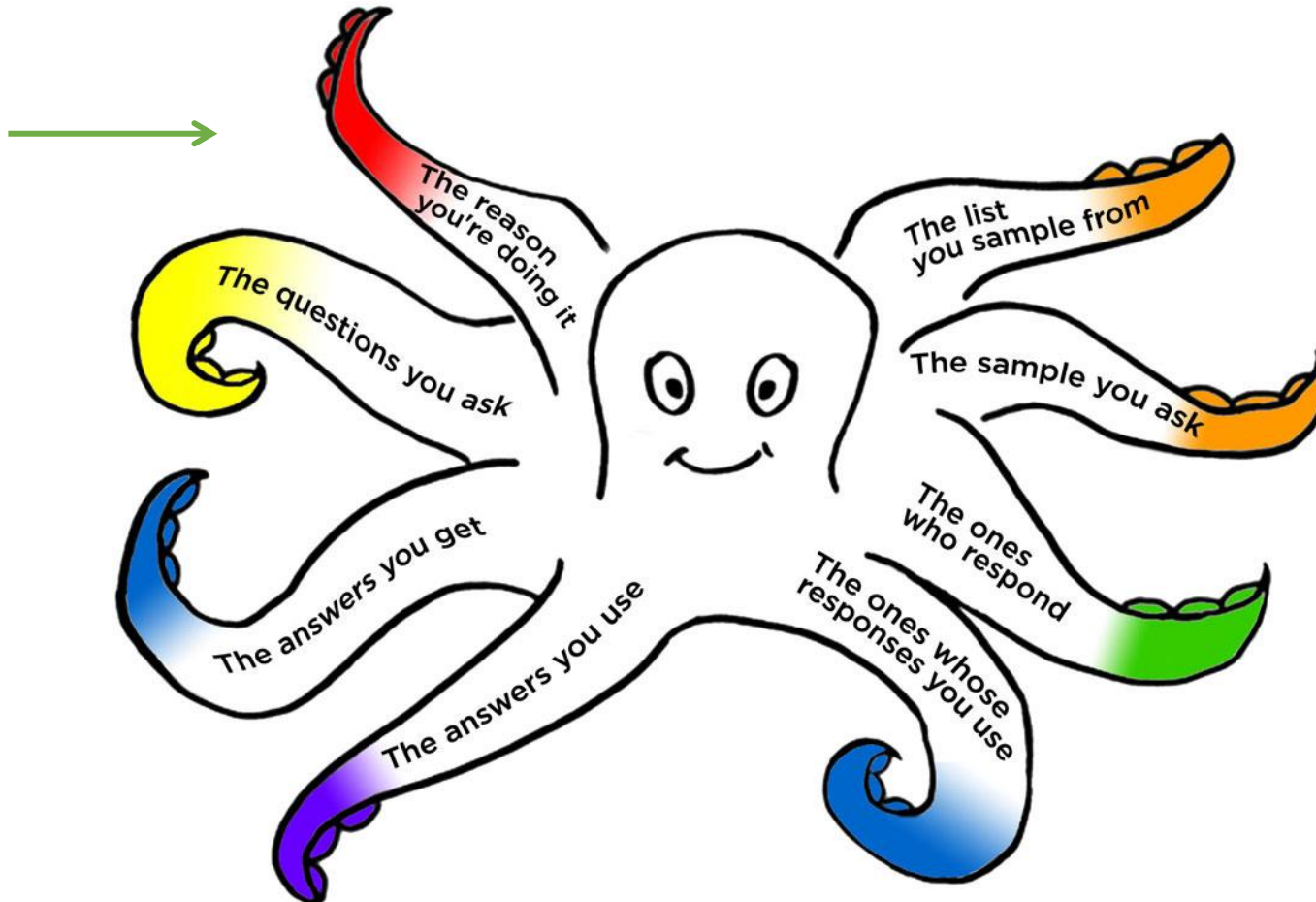
# Questions relate to the reason you're doing it

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

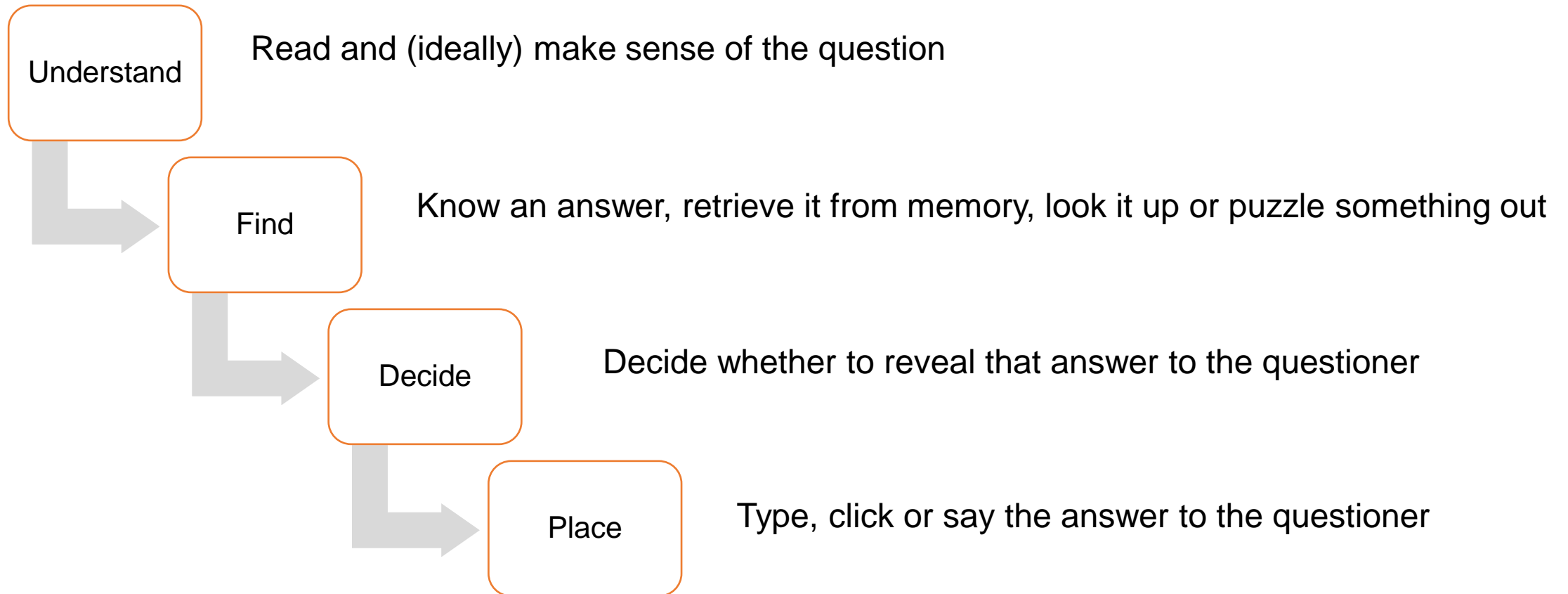


# Lack of validity is a mismatch between what you ask and what you need to know

(Lack of)  
validity



# There are four steps to answer a question



# A good question is good in four ways

| Step                           | A good question ...                              |
|--------------------------------|--|
| 1. Read and <b>understand</b>  | is legible and makes sense                       |
| 2. <b>Find</b> an answer       | asks for answers that we know or can find easily |
| 3. <b>Decide</b> on the answer | asks for answers we're happy to reveal           |
| 4. <b>Place</b> the answer     | offers appropriate spaces for the answers        |

# 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: 1: read and understand

**Are you...?**  
*Please select one response only.*



Next

# Four step examples: 2: find the answer

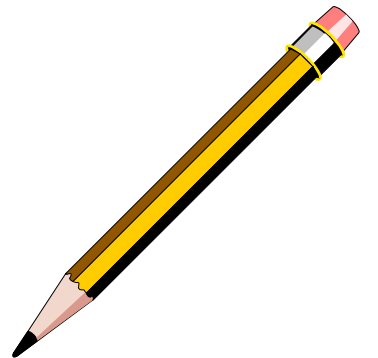
## Question 25

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?

# Do you say your name differently?


“What is your name?”

- In a formal context – applying for a job
- In a social context – meeting the friend of a friend
- On the phone – getting a delivery sorted out





# Four step examples: 3: decide on 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

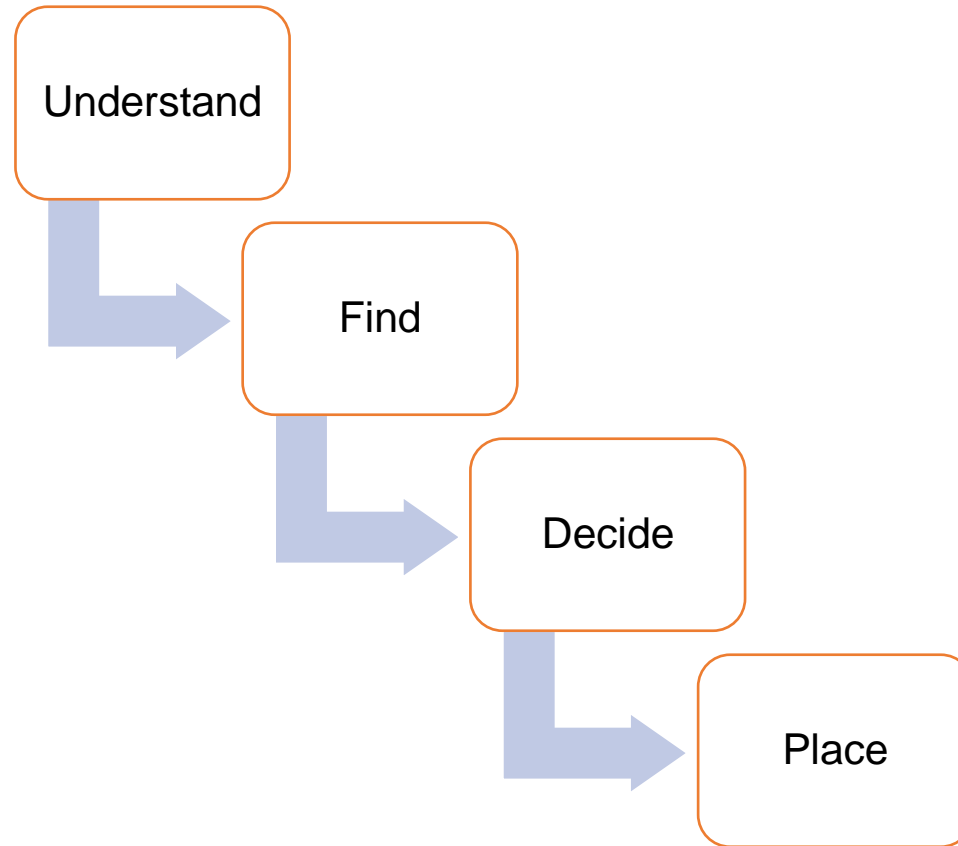
**Where do you currently live?**

*Please make a selection on the map.*

Questions



# We've looked at four separate steps



# The steps can happen instantly

- What is your name?
- Can we ask you a few questions today?

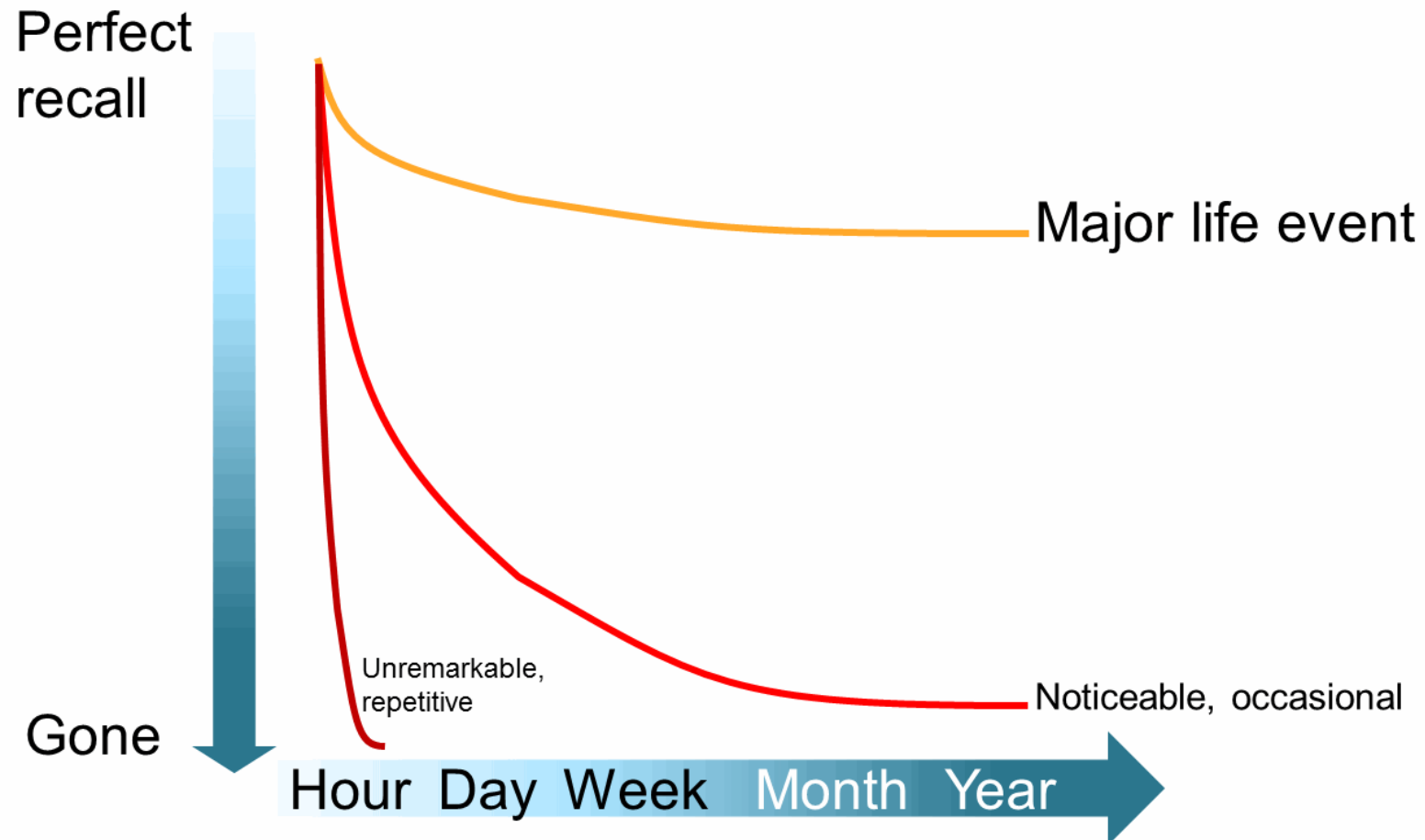
# Sometimes the four steps take a long time

- Tell us why you are a good candidate for this job
- Report your full taxable income
- Provide us with a cash-flow analysis for the next five years

# Estimating routine work tasks is really difficult

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?

# There is an approximate curve of forgetting



# Let's practice finding problems at each step

I've chosen two examples from my library

Have a look at them in your groups on Mural

Make notes about any problems you spot at each of the four steps:

- Understand
- Find
- Decide
- Place
- 5 minutes

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, Carotaker, 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 Q00+ 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

**BBC**  
**OPINION SURVEY**

You have completed 48% of the survey so far: 100%

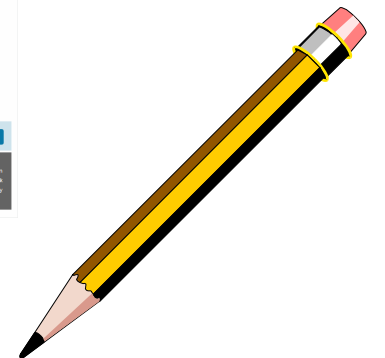
For the following statements about the **Commercial Availability** site, please give a mark out of 10, where 1 indicates 'Strongly Disagree' and 10 indicates 'Strongly Agree'.

|   | 1                     | 2                     | 3                     | 4                     | 5                     | 6                     | 7                     | 8                     | 9                     | 10                    | Don't know            |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| It's the kind of website I would talk to other people about | <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 type="radio"/> |
| I felt I learnt something new from visiting this website    | <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 type="radio"/> |
| This website inspired me to do something new                | <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 type="radio"/> |
| I found this website engaging                               | <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 type="radio"/> |
| The website is up to date                                   | <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 type="radio"/> |
| The website is fresh and new                                | <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 type="radio"/> |
| The website reflects British culture                        | <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 type="radio"/> |

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About any other issue, please contact the BBC on <http://www.bbc.co.uk/feedback>.  
If you would like further information please read the BBC's privacy policy at <http://www.bbc.co.uk/privacy>.





## What did we think of this one?

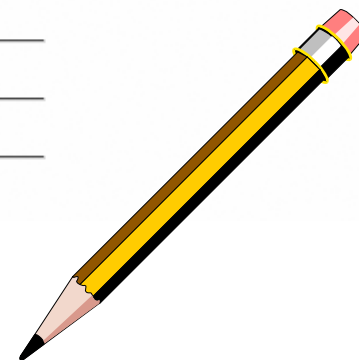
Please indicate to which occupational group the Chief Income Earner in your household belongs, or which group fits best.

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



## I got almost the same question last week

Please indicate which of the following best describes the current, or most recent, occupation of the main income earner in your household.

**If the main income earner is retired and has an occupational pension, or if they have been out of employment 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, Shop Assistant etc.)
- ☐ Skilled manual worker  
(e.g. Skilled Bricklayer, Carpenter, Plumber, 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 Doctor, Solicitor, Board Director in small organisation, Middle Manager in large organisation etc.)
- ☐ Higher managerial / professional / administrative  
(e.g. Established doctor, Solicitor, Board Director in a large organisation etc.)
- ☐ Student
- ☐ Casual worker – not in permanent employment
- ☐ Homemaker
- ☐ Retired and living on state pension
- ☐ Unemployed or not working due to long-term sickness
- ☐ Full-time Carer of other household member
- ☐ Other

And this one?

**BBC**

OPINION SURVEY

You have completed 48% of the survey so far:

100%

For the following statements about the **Commercial Availability** site, 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            |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| It's the kind of website I would talk to other people about | <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 type="radio"/> |
| I felt I learnt something new from visiting this website    | <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 type="radio"/> |
| This website inspired me to do something new                | <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 type="radio"/> |
| I found this website engaging                               | <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 type="radio"/> |
| The website is up to date                                   | <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 type="radio"/> |
| The website is fresh and new                                | <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 type="radio"/> |
| The website reflects British culture                        | <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 type="radio"/> |

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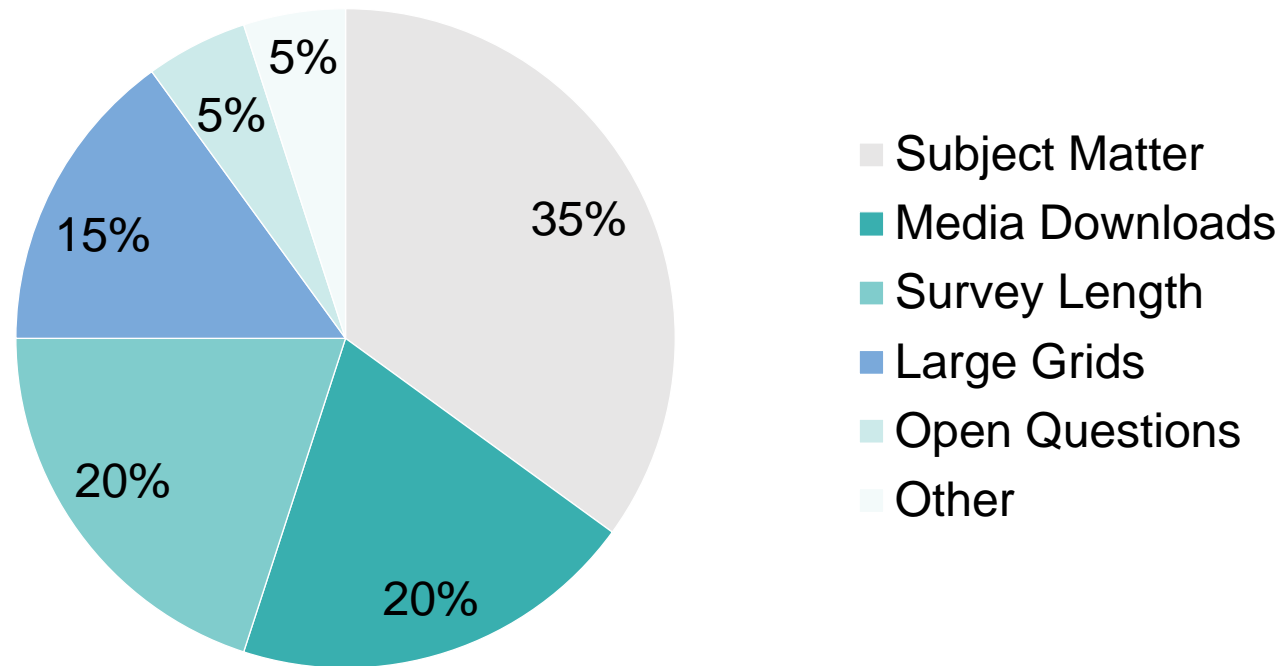
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About any other issue, please contact the BBC via <http://www.bbc.co.uk/feedback>  
If you would like further information please read the BBC's privacy policy at <http://bbc.co.uk/privacy>

# Grids are a major cause of survey drop-out

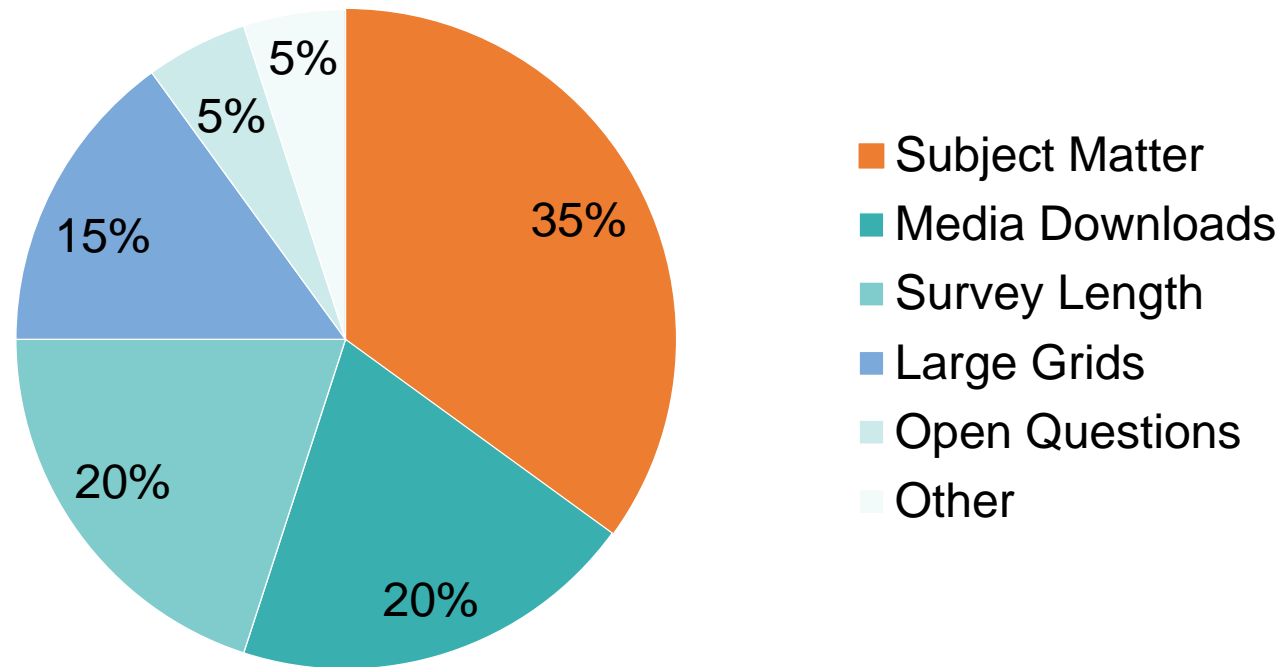
Total incompletes across the 'main' section of the questionnaire  
(after the introduction stage)



Source: Database of 3 million+ web surveys conducted by Lightspeed Research/Kantar  
From Coombe, R., Jarrett, C. and Johnson, A. (2010) "Usability testing of market research surveys" ESRA Lausanne

# But it's the topic that matters most

Total incompletes across the 'main' section of the questionnaire  
(after the introduction stage)



Source: Database of 3 million+ web surveys conducted by Lightspeed Research/Kantar  
From Coombe, R., Jarrett, C. and Johnson, A. (2010) "Usability testing of market research surveys" ESRA Lausanne

# A good question is good in four ways

| Step                           | A good question ...                              |
|--------------------------------|--|
| 1. Read and <b>understand</b>  | is legible and makes sense                       |
| 2. <b>Find</b> an answer       | asks for answers that we know or can find easily |
| 3. <b>Decide</b> on the answer | asks for answers we're happy to reveal           |
| 4. <b>Place</b> the answer     | offers appropriate spaces for the answers        |

# Try a person-led review to check your questions

- Very often, the survey process starts with a draft questionnaire
- I do a lot of person-led reviews with clients and colleagues

# A “person-led expert review” starts with stories

Each attendee writes a ‘once upon a time’ story:

- Choose the name of a person
- Write:
  - something about them
  - why they are responding to this questionnaire

(optional: everyone shares the story that they wrote)



# Now try answering the questionnaire

- Go through the questionnaire, answering ONLY from the point of view of that person
  - Keep notes!
- When all the attendees have completed the questionnaire, compare answers



# Let's try it. First, the person-led bit.

Our stakeholders have said:

“We want to know what users think about our new funding application process”

They have brought a draft questionnaire to a meeting.

- Choose the name of a person
- Write something about:
  - Who the person is
  - Their experience with the funding application process



Now note your person's answer to this question

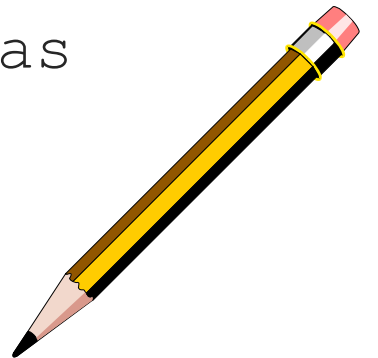
## Application Process - Feedback Survey

### Section 1: About you

Thank you for taking the time to provide feedback on the application process.

Q1 Who submitted your application?

- ☐ I did
- ☐ Family member
- ☐ Paid professional, such as accountant



Note your person's  
answers to Q2 and Q3

Q2 Who is completing this survey?

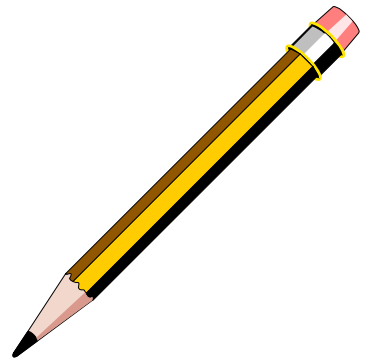
- ☐ I did
- ☐ Family member
- ☐ Accountant or adviser

Q3 What motivated you to apply?

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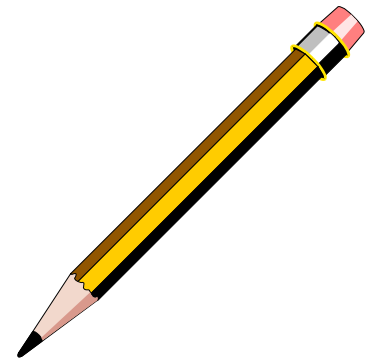


## Section 2: The application process

Note your person's answers to Q4

Q4 How satisfied are you with the application process, on a scale from 0 to 10 where '0' means 'not at all satisfied' and 10 means 'completely satisfied'?

- ☐ 0
- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ 6
- ☐ 7
- ☐ 8
- ☐ 9
- ☐ 10



Note your person's  
answers to Q5

Q5 Please use the box below to provide us with  
your feedback on the application process.  
*Max: 500 characters*

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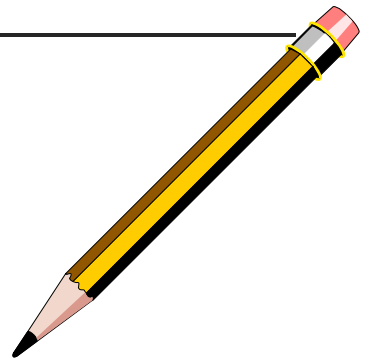
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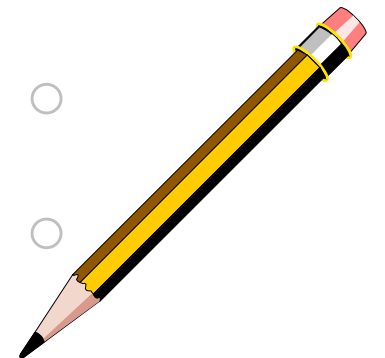
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## Note your person's answers to Q6

Q6 Were you aware of, and did you make use of, the following:  
Tick all that apply

|                                    | I wasn't aware<br>this was an<br>option | I was aware of<br>this but didn't<br>use it | I was aware of<br>it and made<br>use of it |
|------------------------------------|---|---|--|
| Content on our website             | <input type="radio"/>                   | <input type="radio"/>                       | <input type="radio"/>                      |
| Videos on our YouTube channel      | <input type="radio"/>                   | <input type="radio"/>                       | <input type="radio"/>                      |
| Q&A session                        | <input type="radio"/>                   | <input type="radio"/>                       | <input type="radio"/>                      |
| Customer Contact Centre            | <input type="radio"/>                   | <input type="radio"/>                       | <input type="radio"/>                      |
| Discussing with a colleague        | <input type="radio"/>                   | <input type="radio"/>                       | <input type="radio"/>                      |
| News media                         | <input type="radio"/>                   | <input type="radio"/>                       | <input type="radio"/>                      |
| Talked to an adviser or accountant | <input type="radio"/>                   | <input type="radio"/>                       | <input type="radio"/>                      |



# Let's compare answers

Were any of those questions problematic for your “person”?

Please discuss in your groups

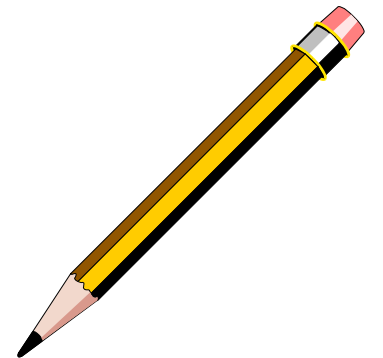
You can edit / add notes / comment in the copy

Report back with your views

10 minutes



Expert review



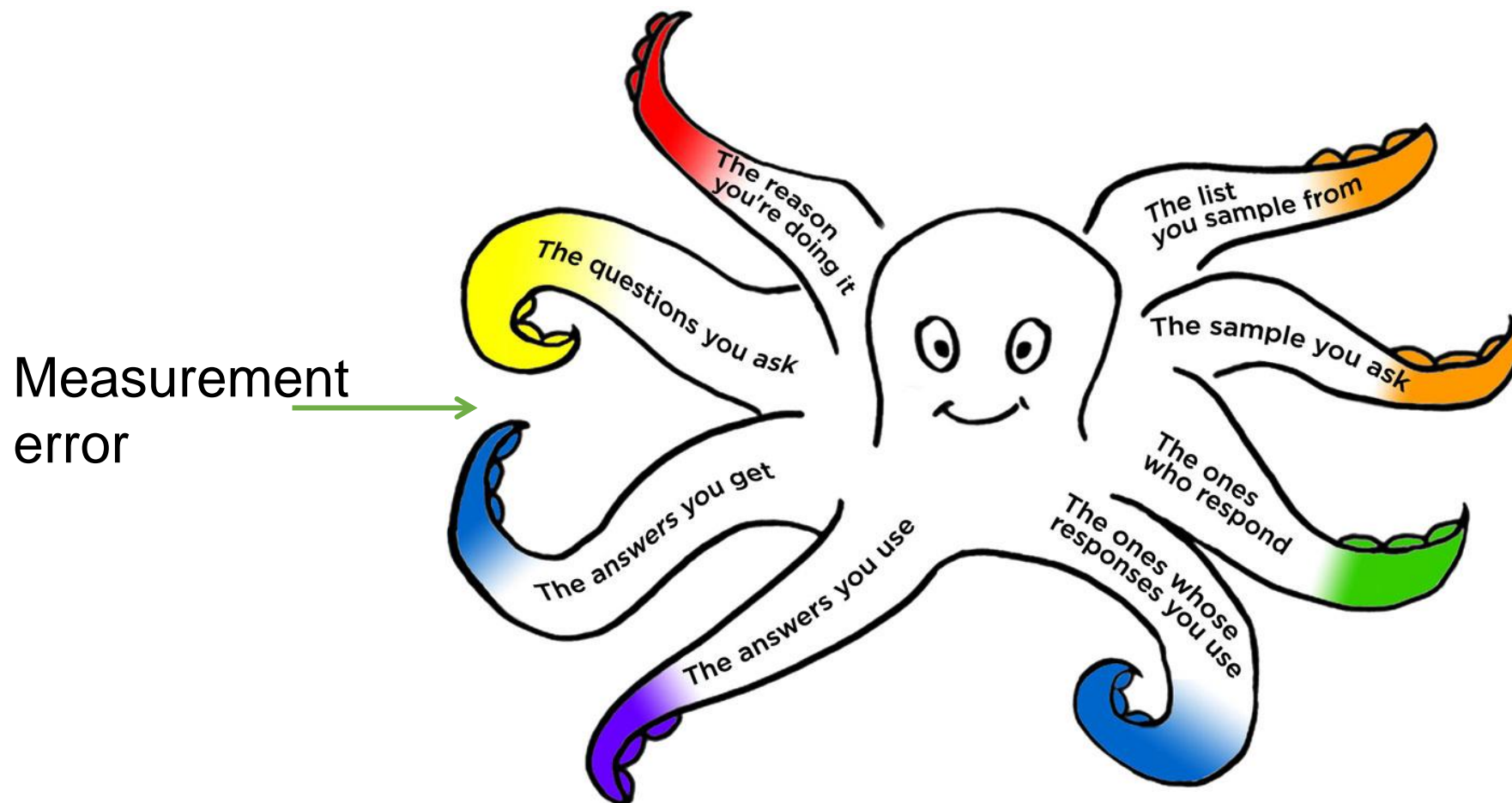


# Workshops can go in different directions

- BACK to thinking about goals and sample
- FORWARD to understanding and drafting better questions
- SIDEWAYS to testing with real people

# BREAK

Measurement error comes from mismatches between the questions you ask and the answers that people give you



# These two questions are quite common

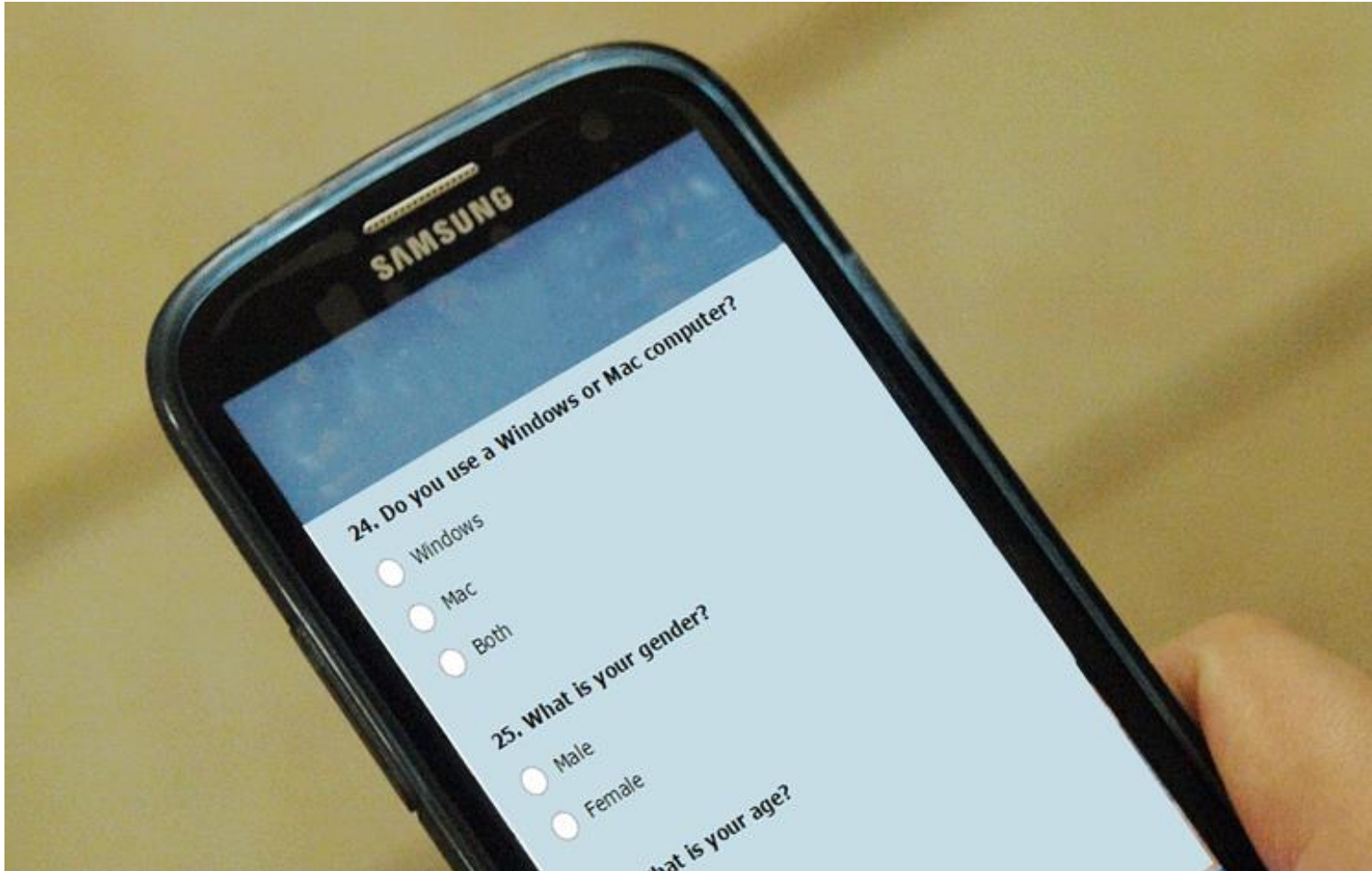
**24. Do you use a Windows or Mac computer?**

- ☐ Windows
- ☐ Mac
- ☐ Both

**25. What is your gender?**

- ☐ Male
- ☐ Female

# One of them does not work in this context



"Phone photography" by Petar Milošević -  
Own work. Licensed under CC BY-SA 3.0 via  
Commons -

[https://commons.wikimedia.org/wiki/File:Phone\\_photography.jpg#/media/File:Phone\\_photography.jpg](https://commons.wikimedia.org/wiki/File:Phone_photography.jpg#/media/File:Phone_photography.jpg)

Modified by Caroline Jarrett

# Takeaway

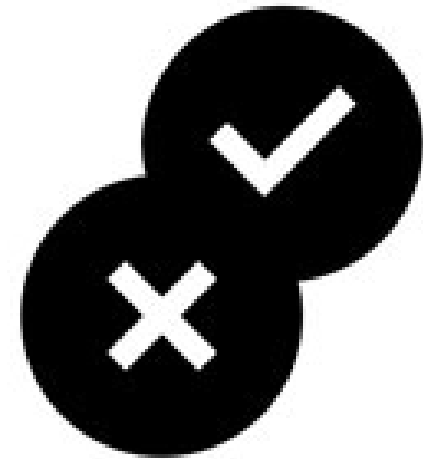
## Always allow for something else



# Aside: I'm constantly saying "No yes/no"

- The real world is analogue
- There are nearly always other answers
- Try spelling out what "yes" and "no" mean

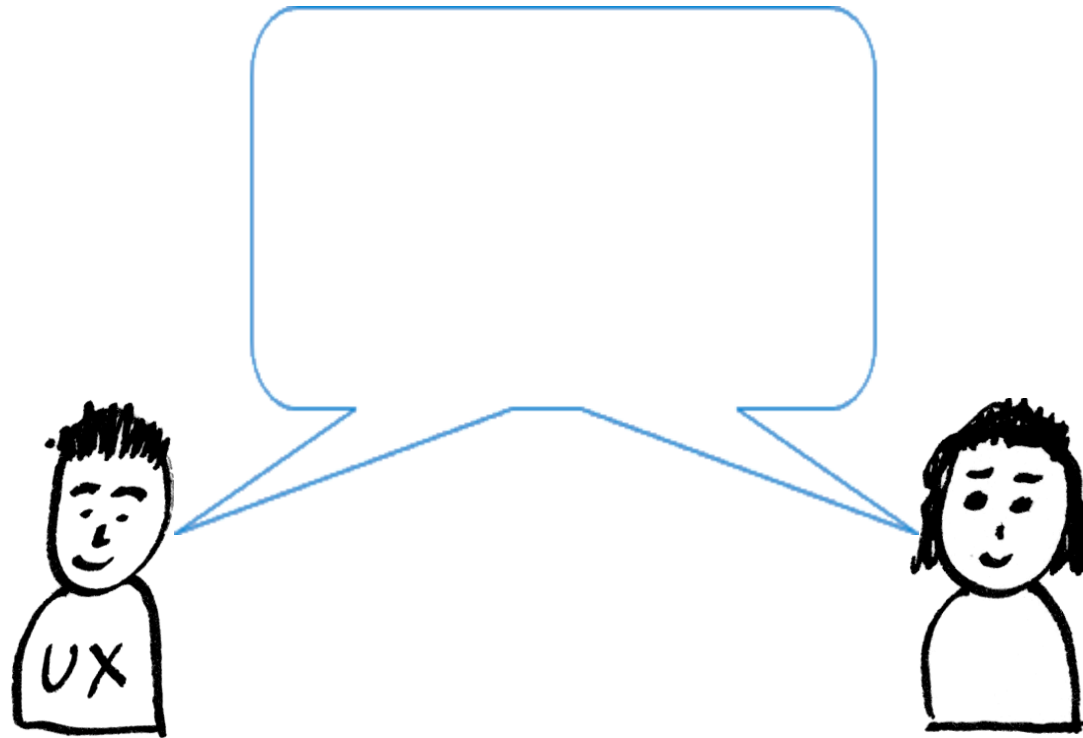
[No yes/no questions - Effortmark](#)



Created by HideMaru  
from Noun Project

# Takeaway

Test your questions by  
interviewing in context





# “Place the answer” is also about using the right widget to collect the answer

| Use           | For   |
|---------------|---|
| Radio buttons | A single answer where you have researched all the possibilities (known answers)   |
| Check boxes   | Multiple known answers  |
| Text boxes    | Answers where you do not know all the possibilities<br>Answers that the person ‘just knows’ and can type easily<br>Answers where you hope that the person will want to write more |

# Open boxes often work better than bands

- If the answer is a routine one that the person ‘just knows’, it can be easier for them to type rather than hunt through options
- Examples of questions that have done better:
  - How old are you?
  - What is the size of your farm?
  - How much would you pay for this certification?

# An excursion into Likert scales

## We've looked at a Likert item

### Section 2: The application process

Q4 How satisfied are you with the application process, on a scale from 0 to 10 where '0' means 'not at all satisfied' and 10 means 'completely satisfied'?

- ☐ 0
- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ 6
- ☐ 7
- ☐ 8
- ☐ 9
- ☐ 10

A Likert scale has several Likert items

Likert scale

Statement

### 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                        |                |

Likert item

Response points

# Likert had three formats in his scales

1. Do you favor the early entrance of the United States into the League of Nations?

|     |     |     |
|-----|-----|-----|
| YES | ?   | NO  |
| (4) | (3) | (2) |

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

# You can find an academic paper to support almost any number of response points

- Krosnick and Presser refer to ~87 papers on response points

|  | Completely satisfied  | Very satisfied        | Quite satisfied       | Neither satisfied nor dissatisfied | Quite dissatisfied    | Very dissatisfied     | Completely dissatisfied |
|--|-----------------------|-----------------------|-----------------------|------------------------------------|-----------------------|-----------------------|-------------------------|
| Your outward journey with easyJet                          | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>              | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>   |
| Your whole experience with easyJet on this latest occasion | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>              | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>   |

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

|  | Strongly Agree<br>5   | Agree<br>4            | Neither Agree nor Disagree<br>3 | Disagree<br>2         | Strongly Disagree<br>1 | Not Applicable        |
|--|-----------------------|-----------------------|---------------------------------|-----------------------|------------------------|-----------------------|
| Overall, I was satisfied with my experience in Hayward Dining Room | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>  | <input type="radio"/> |

Please tell us how your experience at John Lewis compares to each of the other retailers you have visited?

|  | John Lewis is WORSE   | About the same        | John Lewis is BETTER  |
|--|-----------------------|-----------------------|-----------------------|
| Supermarket                            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other local store/independent retailer | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

1. Is this OK? Tell us if you agree with us

☐ Strongly agree  
☐ Agree  
☐ Disagree  
☐ Strongly disagree

2. Tell us more about this

| Very Unimportant      | 2                     | 3                     | Very Important        |
|-----------------------|-----------------------|-----------------------|-----------------------|
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

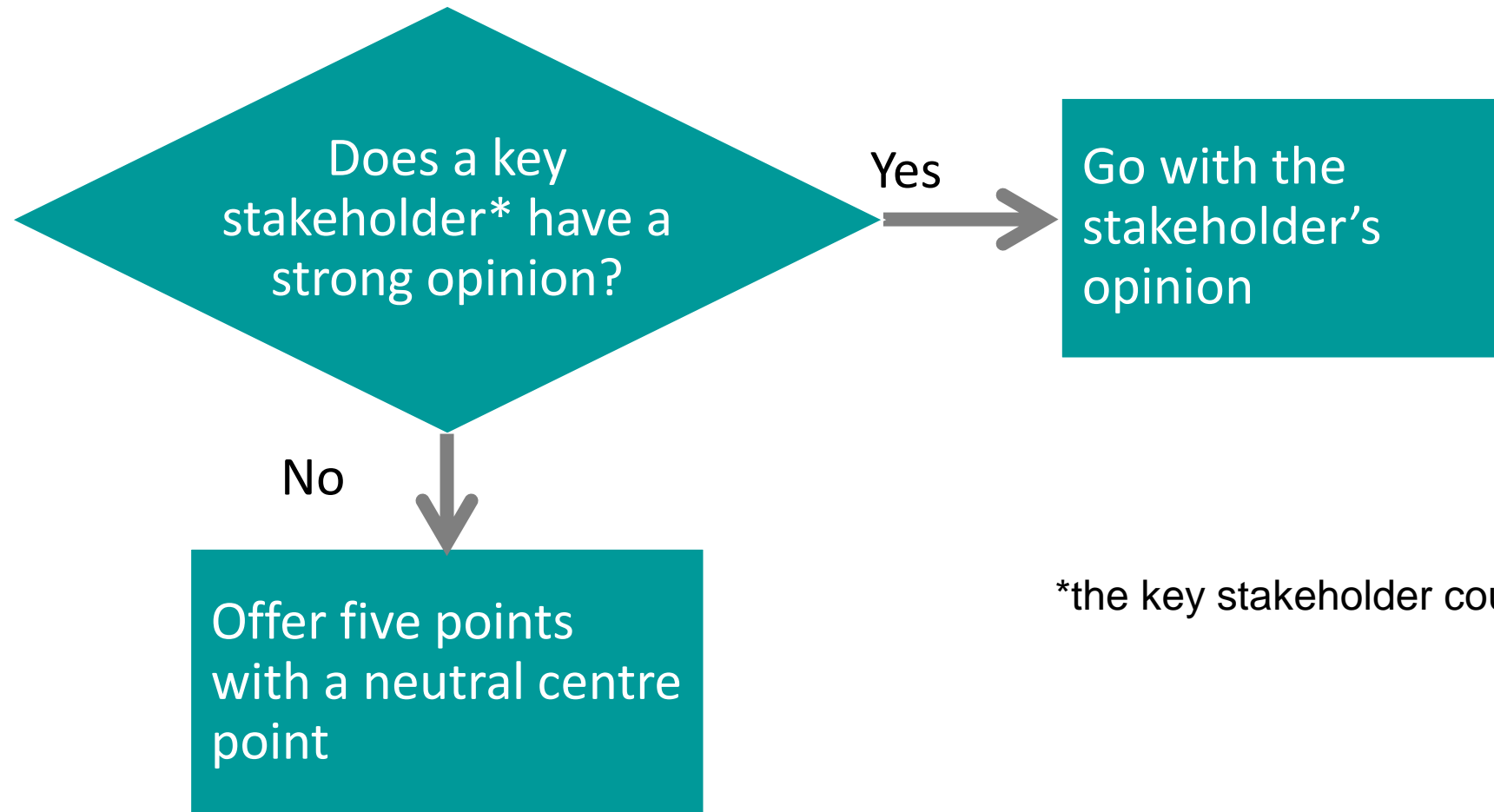
1: \*Please rate how well the site is organized.

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. [Emerald HSR-V017 9 263..313 \(stanford.edu\)](#)

# I have a flowchart to help you to decide



\*the key stakeholder could be you



# Is 'satisfaction' the only relevant emotion?

## Section 2: The application process

Q4 How satisfied are you with the application process, on a scale from 0 to 10 where '0' means 'not at all satisfied' and 10 means 'completely satisfied'?

The Microsoft Product Reaction Cards have lots more

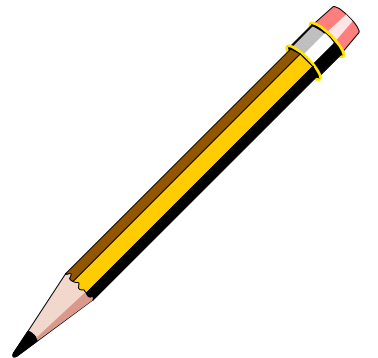
|            |              |          |              |               |
|------------|--------------|----------|--------------|---------------|
| Accessible | Creative     | Fast     | Meaningful   | Slow          |
| Advanced   | Customizable | Flexible | Motivating   | Sophisticated |
| Annoying   | Cutting edge | Fragile  | Not Secure   | Stable        |
| Appealing  | Dated        | Fresh    | Not Valuable | Sterile       |

[Microsoft Product Reaction Cards Unlock User Satisfaction - Part I \(uxfirm.com\)](https://uxfirm.com/microsoft-product-reaction-cards-unlock-user-satisfaction-part-1/)

# Decide on which emotion(s) you might assess

Please discuss in your groups

Report back with your choice(s) – or decision to do none  
5 minutes



# Now it's time to make the questionnaire

- We have the draft that we reviewed today
- Let's think a bit about some topics from yesterday
  - Most Crucial Question
  - Burning Issue
  - Representativeness questions

# The Most Crucial Question comes from goals

- The stakeholder (me) has chosen the Most Crucial Question:  
  
“What is your overall score for the application process?”
- I want a number! That’s my primary goal
- As questionnaire designers, you need to decide how to ask the question. You may be able to convince me that there is a better wording.

# The Burning Issue question comes from users

- We haven't yet had the opportunity to interview any users for their Burning Issues
- You will have to choose or write a question that allows for unknown Burning Issues

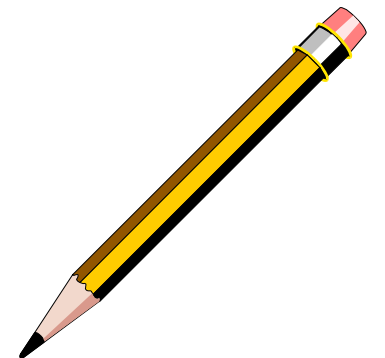
# The representativeness questions ought to come from your work thinking about who you want to ask

Here are some suggestions:

- Did you finish the application?
- What sort of work do you do?
- Is this grant for your own organisation / business or are you a professional helping someone else?
- You may think of others

# Now create a questionnaire

- Write your version of the MCQ
  - “What is your overall score for the application process?”
- Decide on, or write, a question that allows for Burning Issues
- Decide on, or write, representativeness question(s)
- Decide whether to keep or remove any other questions in the draft
- Report back with your choice(s) – or decision to do none
- 15 minutes



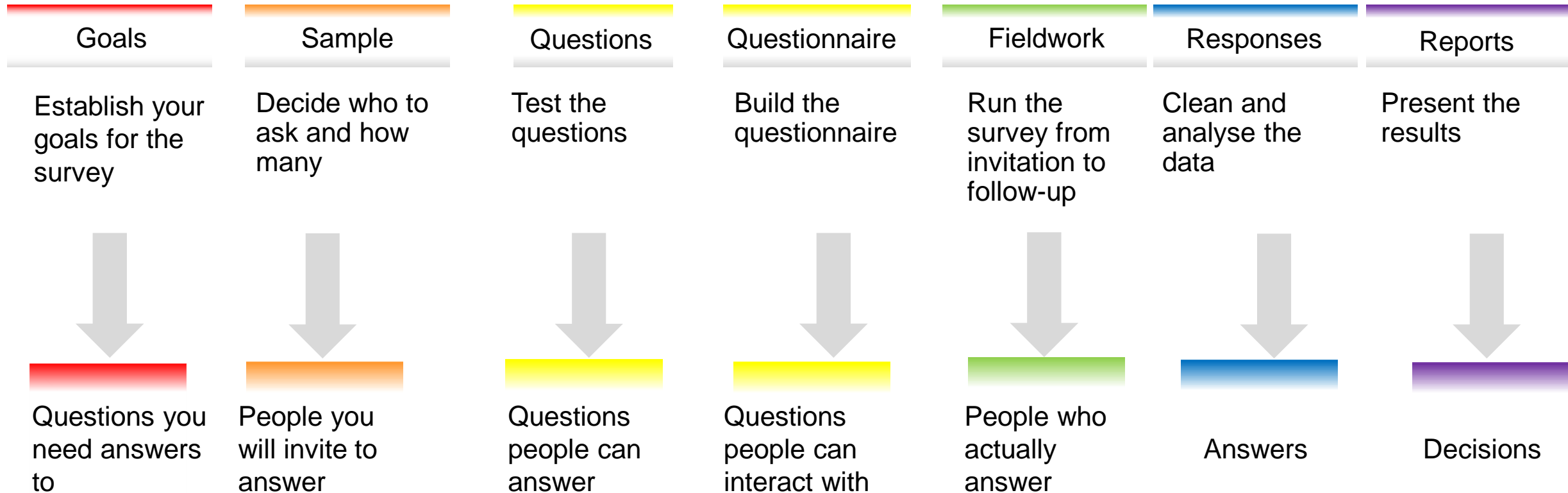
# Break



# Fieldwork

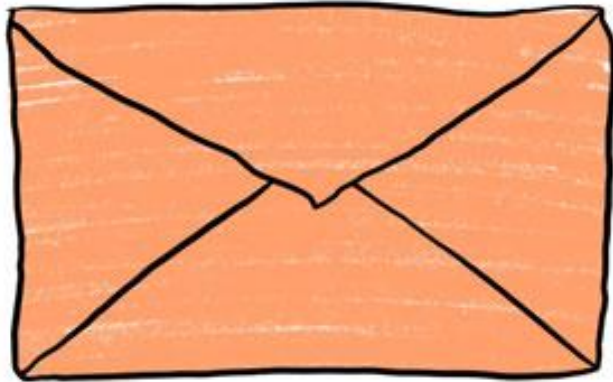
Getting the questionnaire to people

# Here are the 7 steps as a linear process



# Create the right context for your questionnaire

YOUR INVITATION



FOR GOOD  
KARMA

IS AS IMPORTANT

AS YOUR QUESTIONNAIRE

# Your invitation is important

**Dear Epson Customer, review your Epson Stylus Office BX625FWD**

Epson UK <epsonnewsletter@info.epson-europe.com>

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Sent: Fri 14/10/2011 09:29

To: caroline.jarrett@effortmark.co.uk



If you're having trouble viewing this email please [click here](#)



Right-click here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture from the Internet.

EPSON - EXCEED YOUR VISION



Right-click here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture from the Internet.

REVIEW YOUR Epson Stylus Office BX625FWD



Right-click here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture...

**Dear Epson customer,**

Thank you for choosing an Epson Stylus



Right-click here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture from the Internet.

Epson Stylus Office BX625FWD

I think this invitation is trying to sway the response

If you're having trouble viewing this email please [click here](#)





# REVIEW YOUR EPSON STYLUS OFFICE BX625FWD



**Dear Epson customer,**

Thank you for choosing an Epson Stylus Office BX625FWD. We'd like to hear about your experience – please tell us what you think.

Your opinion is valuable to us, and will help us develop products that best meet your needs. [Your review](#) will also help others to choose the right product.

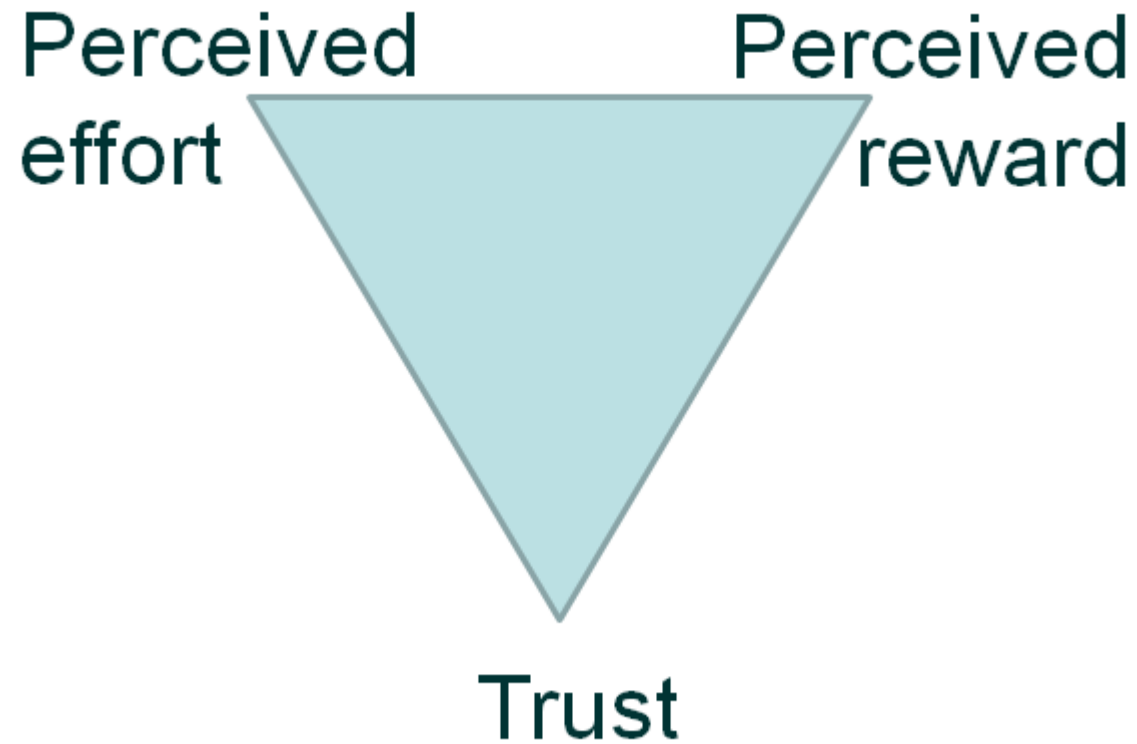
[WRITE YOUR REVIEW](#)



 Written by Digger

16 July 2011

# Response relies on effort, reward, and trust



# A good invitation creates trust

- Consider whether your branding could sway the response
  - Are you a brand that has a high profile?
  - Are you likely to be known to the person who answers?
  - Can you get sponsorship from a trusted person or organisation?
- Say who you are
- Say why you've contacted this person specifically
- Explain:
  - Your privacy policy
  - Your approach to anonymity and confidentiality

# A good invitation offers a perceived reward

- Explain the purpose of the survey
- Explain why this person's responses will help
- If there is an incentive, offer it
  - Incentives do not have to be financial
  - If the incentive is financial, make sure it is easy to get (otherwise you increase perceived effort)

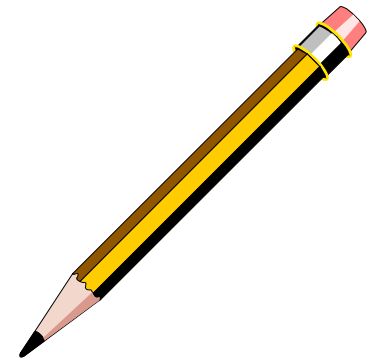


# A good invitation explains the effort

- Outline the topic of the survey
- Say when the survey will close
- Consider saying how many questions there are
- Do NOT say how long it will take
  - unless you have tested the heck out of it and are extremely sure that you know the answer

# Write the invitation and thank-you

- Hints:
  - Consider your privacy policy
  - Decide on your approach to anonymity and confidentiality
  - The invitation can be part of the questionnaire
  - Thank-you is usually on a separate page
- 10 minutes



# Testing your questionnaire

# Testing with users is essential

## Review with stakeholders

- Goals to decisions
- Person-led expert review

## Testing with users

- Pilot study
- Usability test
- Cognitive test
- Cogability test

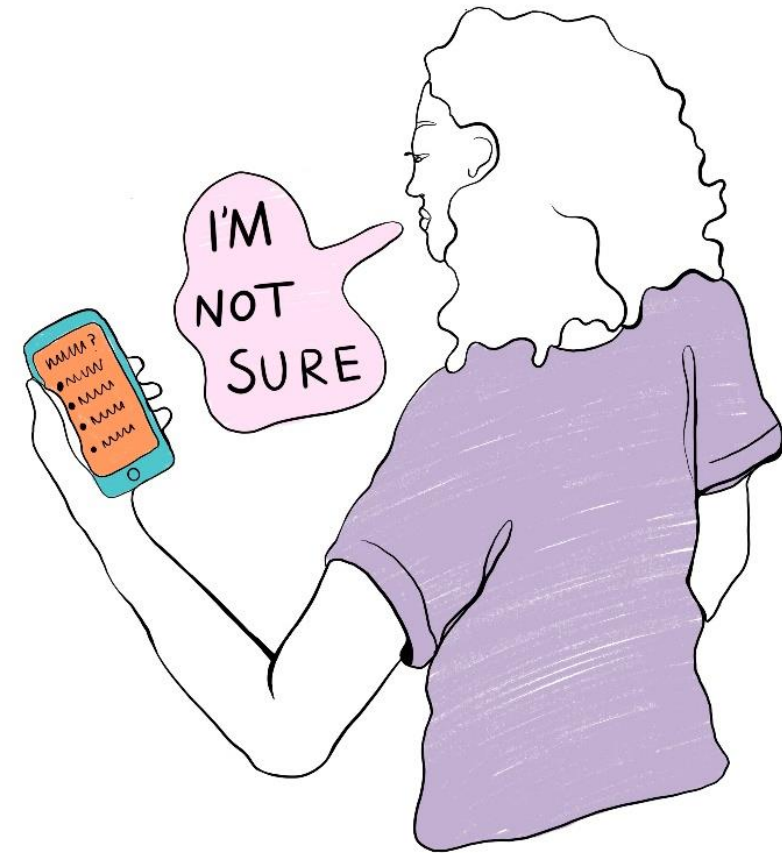
# Test it: pilot study

- Run the survey from invitation to the follow-up
- Look for mechanical problems like:
  - wrong link in the invitation
  - no thank-you page
- Find out what your response rate is so that you can work out your sample size

*“If you don’t have time to do a pilot study, you don’t have time to do the survey”*

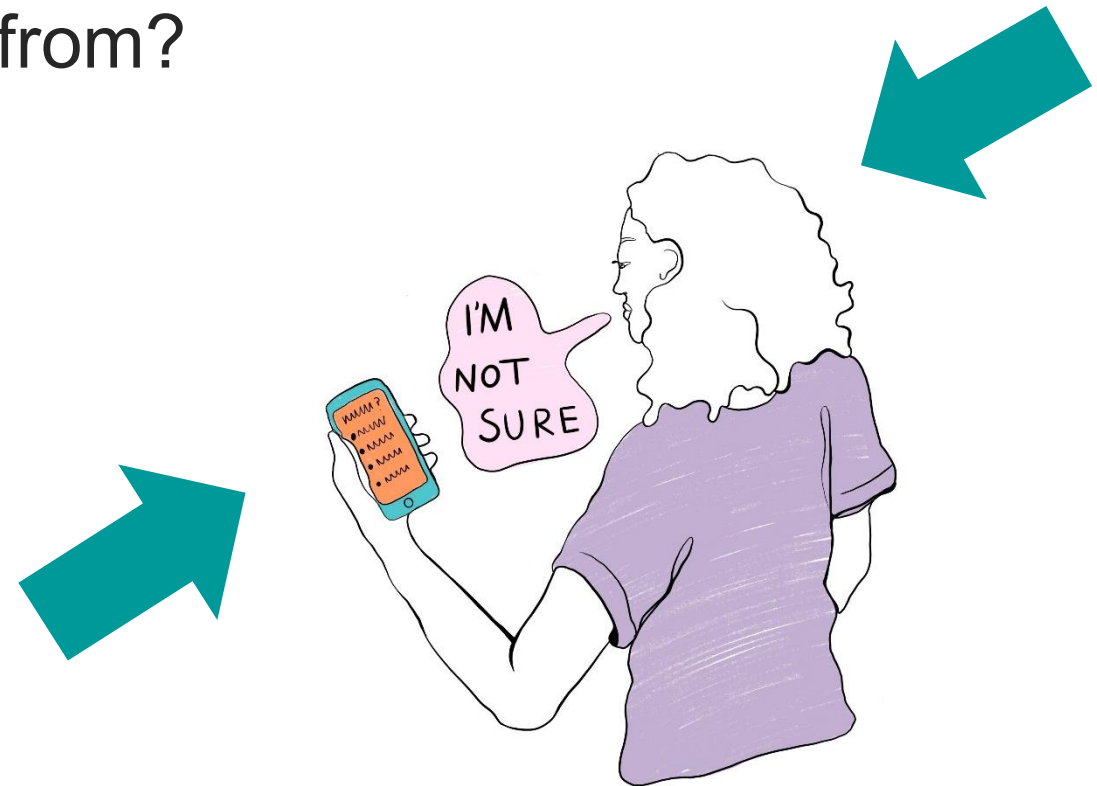
# Do usability testing on your questionnaire

Get someone to answer your questionnaire while you watch

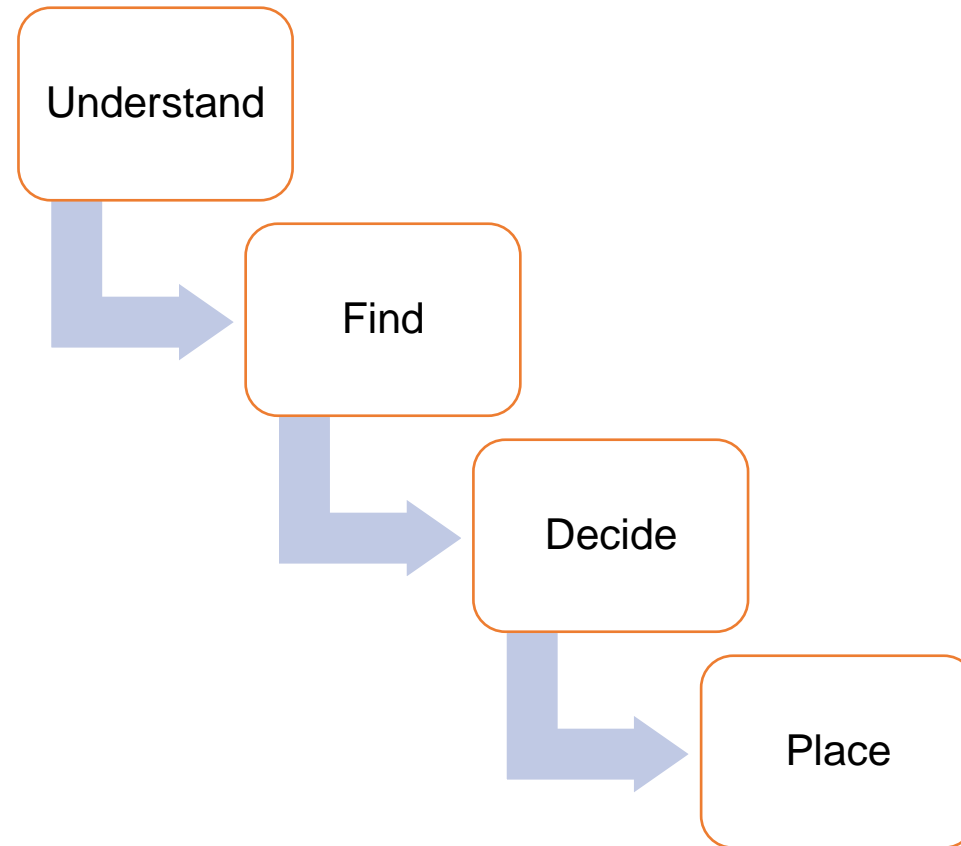


# Do cognitive testing on your questions

Where did 'I'm not sure' come from?  
Was it an interaction problem?  
What is this person thinking?



# You're looking out for problems at each step





# Try this thought-process exercise

Answer this question:

“How many windows are there in the place where you normally live?”

Note your thought processes



# Strategies can be in your head, elsewhere, ask

Typical strategies are:

- Mental walkthrough of the place
- Look on the receipt for the recent new windows (!)
- Ask someone else (!)



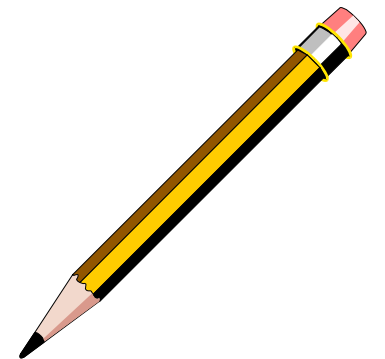
# Cogability testing is a hybrid method

- Run a usability test in the usual way BUT
- Ask the person to think aloud as they work AND
- Interrupt them with cognitive probes
  - “Tell me about how you thought of that answer”
  - “Did you know that answer straight off or think about it?”
  - “Was that answer from counting or a guess?”

“Cogability testing” coined by Laura Wilson and Emma Dickinson in “Respondent Centred Surveys” (2021)

# Let's test a questionnaire

- Please volunteer!
- I have a test participant here ready to try it
- Everyone else: you are note-takers



# If I can only do one, it's a pilot study

## Review with stakeholders

- Goals to decisions
- Person-led expert review

## Testing with users

- **Pilot study**
- Usability test
- Cognitive test
- Cogability test

# Takeaway

“It’s done when  
a real user has used it  
for something real”  
- By me

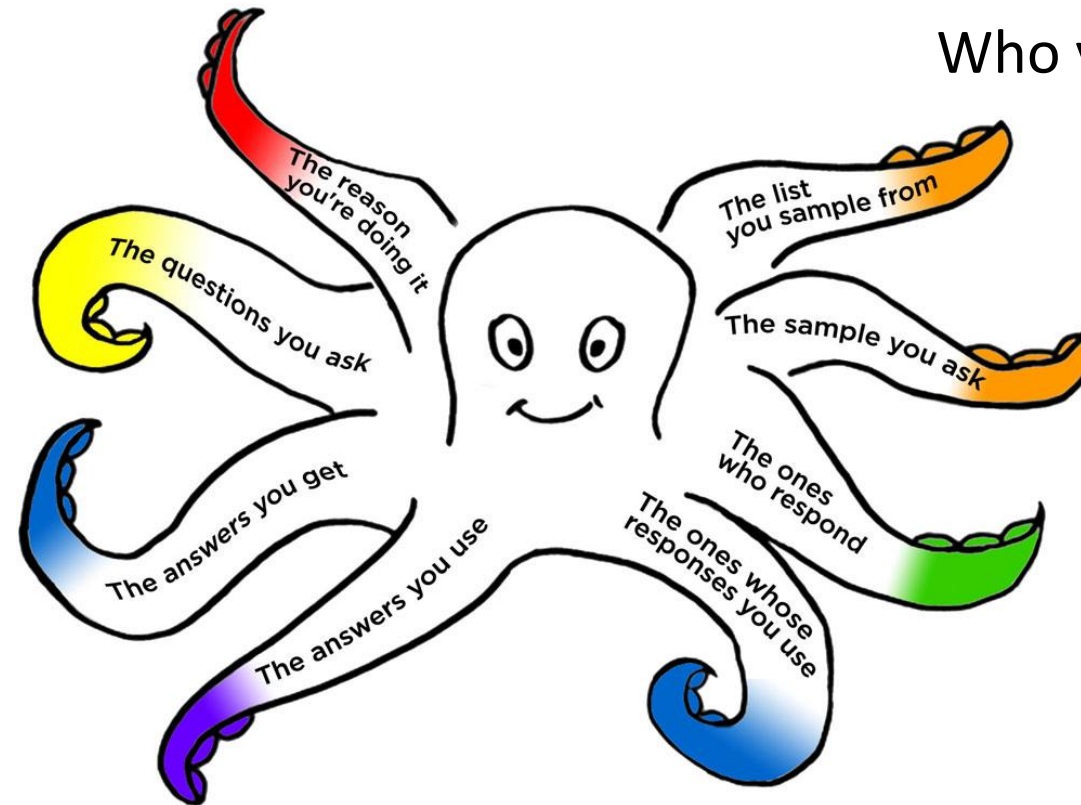
# Think about the test and iterate

- Are the people you tested with representative?
- Did you test the whole survey
  - From invitation to follow up?
  - Including the analysis of responses?
  - Including finding out whether you can make the decision?
- What do you need to change for the next version?

# The questions are linked with the ones who respond

Why you want ask

Who you want to ask



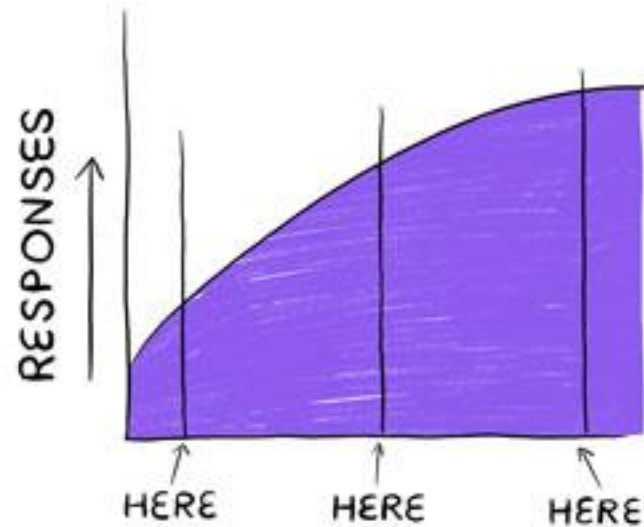
The number



# Tomorrow we'll look at responses

| Goals                               | Sample                         | Questions          | Questionnaire           | Fieldwork                                   | Responses                  | Reports             |
|-------------------------------------|--------------------------------|--------------------|-------------------------|---|----------------------------|---------------------|
| Establish your goals for the survey | Decide who to ask and how many | Test the questions | Build the questionnaire | Run the survey from invitation to follow-up | Clean and analyse the data | Present the results |
| Yesterday                           |                                | Today              |                         |   | Tomorrow                   |                     |

# Start analysing when you have any responses



# Please join my EasyRetro

You'll find columns for:

- Anything useful from today
- Not useful / confusing / could have skipped
- Want to know but hasn't yet come up
- Has come up but want more

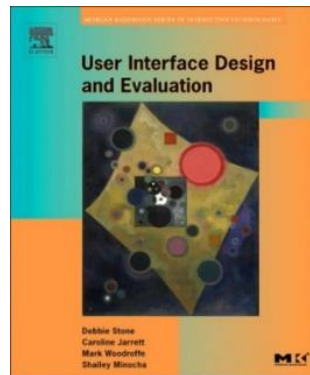
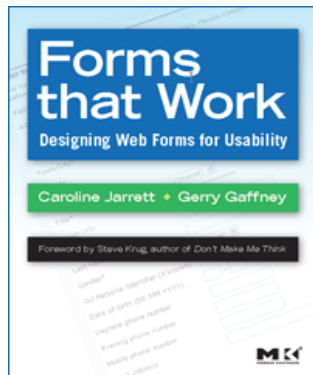


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[carolinej@effortmark.co.uk](mailto:carolinej@effortmark.co.uk)



## SURVEYS THAT WORK

A Practical Guide for Designing Better Surveys

by **CAROLINE JARRETT**

Foreword by Steve Krug

 Rosenfeld