

# Ins and Outs of Surveys

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***“USA Today just came out with a recent survey that showed that three out of four Americans make up 75% of the population.”***

***~David Letterman***

# Why Do A Survey?

- To figure out what is going on
- To provide an opportunity to discuss key topics with your stakeholders
- To help prioritize your actions based on data
- To provide a benchmark

# First Things First: Have A Plan

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*If you don't know where you are going, you  
might wind up some place else.*

*~Yogi Berra*

# First Things First: Have A Plan

## ***Problem Statement:***

A clear and concise statement of the problem you want to study or the information that you want

Ask yourself: “What issue am I trying to inform?”

“If I knew \_\_\_\_\_, I would be better prepared to make my decision”

# First Things First: Have A Plan

*What are the objectives of your survey?*

- **What information do you need to gather to better understand your problem/issue?**
  - What am I trying to measure?
- **How will the information be used and by whom?**
- **What is the population that will be surveyed?**
- **What kind of analysis will be useful for understanding the survey results?**

# First Things First: Have A Plan

*What is your budget for the survey?*

*What method of surveying do I want to use?*

**Face-to-face interview**

**Telephone interview**

**Mailed survey**

**Web-based survey**

# First Things First: Have A Plan

**A quick recap:**

- **Problem statement**
- **Objectives of your survey**
- **Budget available**
- **Method of surveying**

***Write these down before even thinking about your survey questions.***



# First Things First: Have A Plan



# Methods of Surveying

## Face-to-Face Interviews

### PROS

- High response rate
- Can provide clarification of questions
- Control over respondent selection
- Easier to engage respondent
- Can use longer, more complex questions

### CONS

- High cost/expense
- Time consuming
- Lots of administrative issues including training interviewers, recruiting respondents, “air traffic control” and logistics
- Quality assurance
- Socially acceptable answers

# Methods of Surveying Telephone Interviews

## PROS

- Fair to good response rate
- Allows some respondent anonymity
- Control over respondent selection
- Increased likelihood of obtaining a representative sample

## CONS

- High cost/expense
- Lots of administrative issues including training interviewers, “air traffic control” and logistics
- Quality assurance
- Finding people willing to respond
- Hard to pin down geographical areas given high use of cell phones
- Short, easy questions
- Socially acceptable answers

# Methods of Surveying

## Mailed Surveys

### PROS

- Easy to locate respondents
- Avoid interviewer bias
- Anonymity of respondents
- People used to paper-pencil surveys
- Can be completed at respondent's convenience

### CONS

- Need rigorous follow-up to get a good response rate
- Not sure who is completing it
- Can't provide clarification
- Respondents must be able to see, read and write
- Can be costly
- Hard to design
- Hard to interpret open-ended questions
- Data entry

# Methods of Surveying Web-based Surveys

## PROS

- Low cost
- Can reach a vast population
- Data automatically entered/tabulated
- Can send reminders
- Can require answers to questions
- Can assure anonymity if you choose
- Avoid interviewer bias
- Easy to administer

## CONS

- Respondents must be computer-savvy and online
- Can be technical issues
- Difficult to design
- Poor control over respondent selection
- Follow-up difficult to do
- Cannot provide clarification

# Designing Your Survey

## *Three Key Points:*

- 1. Keep it short*
- 2. Keep it simple*
- 3. Keep it interesting*

# Designing Your Survey: Sections of a Survey

## *Introduction*

*A brief introductory paragraph that covers the reason for the survey, voluntary participation, confidentiality, timelines for completion and survey administrator contact information.*

# Designing Your Survey: Sections of a Survey

## *Instructions*

*Clear directions on how to complete the survey. Keep these to a minimum and make sure they are simple.*



# Designing Your Survey: Sections of a Survey

***The Actual Questions***

***Classification Questions***

***Demographic information***

***Identification Questions***

***Asking for name, organization, contact information***

# Designing Your Survey: General Layout

## *Length*

- *Keep it as brief as possible*
- *Email/mail surveys should not take longer than 10 to 15 minutes to complete*

# Designing Your Survey: General Layout

## *Appearance*

- *Should give the appearance that they will be easy to complete*
- *Neat*
- *Appropriate sized font*
- *Lots of white space*
- *Readable*
- *Clean and simple!!*

# Designing Your Survey: General Layout

	Strongly Agree									Strongly Disagree		N/A
	10	9	8	7	6	5	4	3	2	1		
The information about how to use Mobile Banking is helpful	<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"/>	
Mobile Banking is available when I need it	<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 Mobile Banking pages load quickly	<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"/>	
Mobile Banking makes managing my finances easier	<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 feel confident about finding my way around in Mobile Banking	<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"/>	
My account information is updated quickly in Mobile Banking	<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"/>	
Mobile Banking is secure	<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 amount of account history available in Mobile Banking is sufficient	<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 am able to easily transfer funds using Mobile Banking	<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 response time of Mobile Banking on my mobile device meets my expectations	<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"/>	
My account balances in Mobile Banking are accurate	<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"/>	
It is easy to complete tasks using Mobile Banking	<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 was able to find the information I was looking for using Mobile Banking	<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"/>	
My account information in Mobile Banking is easy to understand	<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"/>	

# Designing Your Survey: General Layout

## *Transition Statements*

- *Ask important questions early*
- *Whenever you shift topics or sections within the survey, provide a clear and concise transition statement*
- *Make sure questions and sections flow logically. Cluster similar type questions together.*

# Designing Your Questions

***Be specific and keep it simple***

***“Did you like the conference?”***

***VS.***

***“The breakout session provided information that I will be able to use in my job.”***

# Designing Your Questions

*Avoid jargon, acronyms and slang*

*Use simple language; eschew obfuscation*

# Designing Your Questions

***Avoid subjective language***

***“Like most people, do you.....?”***

***Avoid vague terms like “often” “rarely”  
“sometimes”***



# Designing Your Questions

## *Avoid double-barreled questions*

*“Please rate the food and the presenters at the conference”*

## *Avoid leading questions*

*“Don’t you agree that the presentation on survey design was the best part of the conference?”*

# Designing Your Questions

*Make responses mutually exclusive*

*“What did you have for lunch today?”*

- Salad*
- Sandwich*
- Fruit*

*\*\*What if I had all three? How would I respond?\*\**

# Designing Your Questions

*Responses should be exhaustive*

*“What is your age?”*

- 0-10*
- 10-20*
- 20-30*
- 30-40*

***\*\*What if I am older than 40? \*\****

# Designing Your Questions

*Responses should not overlap*

*“What is your age?”*

- 0-10*
- 10-20*
- 20-30*
- 30-40*

***\*\*What if I am 30? How do I respond?\*\****

# Designing Your Questions

*Limit your use of open-ended questions.*

*Don't ask unnecessary questions or be redundant.*

*Allow for "N/A" or "Not Sure" responses where appropriate*

# Designing Your Questions



# Before You Go Any Further.....

*Test drive your survey*

**Have a trusted neutral party take the survey:**

- How long did it take?**
- Did it make sense?**
- Were there any glitches?**

# Response Rates: What Can You Expect?

“Typical” response rate is usually between 10% and 30%.

*However, this can be influenced by a number of factors.*



# What Influences Response Rate?

*What is your relationship with the respondent?*

- Recognition of you
- More likely to respond to your survey if they are familiar with you or your organization
- “Brand familiarity”

# What Influences Response Rate?

*What is the respondent's interest in the survey topic?*

- **Is it something s/he cares about?**
- **Is it something that will impact his/her world in some way?**
- **Do respondents have a vested interest in the topic?**

# What Influences Response Rate?

- *Are you offering an incentive?*
- *Are you sending reminders?*
- *What time of year are you sending the survey?*

# What Influences Response Rate?

*Remember, when someone gets your survey, s/he is asking:*

- *What's in it for me?*
- *How much work will this be?*

***\*\*If reward < effort, respondents will more likely to abandon your survey.\*\****

# Three Key Points if You Remember Nothing Else

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**Make it short**

**Make it simple**

**Make it interesting**



**What questions do you have?**