Summary of Survey Design Guidelines

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Goals for this Lecture

- Review guidelines for instrument and question design
  - General instrument guidelines
  - General question guidelines
  - General response scale guidelines
Keep the Survey as Short as Possible

• Minimize total number of questions
  – Remember the Mark Twain quote: “I'm sorry this letter is so long, but I did not have time to make it shorter.”
  – Bottom line: If you aren’t going to analyze it, don’t ask it!
    • Corollary: If it doesn’t help answer the research objective, don’t ask it

• Ensure respondents have ability to respond via chosen survey modes
  – Web-based survey: do all potential respondents have Internet access?
    • Else, could result in selection bias
  – Allow for alternate response modes as necessary
Physical Format Checklist

• If numbering, number all questions sequentially

• Use large, clear type
  – Make it easy to read

• Use ‘white space’
  – Don’t crowd questions and text
  – Place more blank space between questions than between subcomponents of questions

• Put special instructions on questionnaire as needed, next to (or within) question

• Clearly distinguish directions from questions
  – Use different fonts, white space, boxes, etc.
Physical Format, Continued

- For paper surveys, don’t split questions across pages/screens
  - If necessary (e.g., question requires 1.5 pages), restate question and response categories on next page
- If possible, list response categories vertically instead of horizontally
- Be consistent with
  - Direction of response categories
  - Placement of response categories
Self-Administered Surveys

• Use visual elements in a consistent way to define the desired path through the survey
• If you must change conventions part way through, prominent visual cues should alert respondents to the change
• Place directions where they are to be used and where they can be seen
• Present information that needs to be used together in the same location
• Ask one question at a time
Organizing the Questions

• Segment questions by topic
• Ask about related topics together
• Salient questions take precedence over less salient ones
• Use transitions when changing topics – give a sense of progress through the questionnaire
• Leave objectionable questions (e.g., income) for the end
• Put demographic questions at the very end
Guidelines for Writing Good Questions

• Questions must be:
  – Easily and consistently understood
  – Easy to answer:
    • Only ask one question at a time
    • Break complicated questions/concepts up into a series of simpler questions

• Respondents have a common understanding of
  – The meaning of each question
  – What constitutes an adequate answer

• Respondents also must:
  – Have access to information needed to answer
  – Be willing to provide answers called for by questions
Question Design Guidelines

• Survey question design isn’t rocket science
  – It’s mainly common sense combined with careful pre-testing of questions and responses

• Keep questions as simple and direct as possible
  – Break complex queries into a series of questions

• Avoid ambiguous terms and questions like the plague
  – Corollary: Carefully and clearly define complex and technical terms

• Only ask open-ended questions if necessary
  – Don’t ask respondents to do your work for you
  – Exception: As appropriate, give respondents a chance to provide input not otherwise asked for
Specific Response Scale Guidelines (1)

- Response categories should be consistent with the question
  - In the absence of another need/requirement, default to five-point Likert scale
- Categories must be exhaustive, including every possible answer
- Categories must be mutually exclusive (no overlap)
- If appropriate, include a “don’t know” category
Specific Response Scale Guidelines (2)

- Clearly label the response scale(s)
- Be consistent with the scale labels and ordering throughout the instrument
- Keep the number of response categories to the necessary minimum:
  - At what level of detail can respondents easily recall/respond?
  - How finely can respondents meaningfully answer?
  - What is necessary for the analysis?
- If “n/a” response needed/appropriate, visually distance it from the rest of the scale
• Usually it is important to collect covariate data for the analysis
  – Depends on the research objectives, of course
• For example, demographic data
  – E.g., for individuals: age, gender, race, marital status, military service, rank, etc.
  – E.g., for organizations: size, type, mission, etc.
• Usually these are important categories that you want to conduct the analysis by
Take Away: Good Survey Design is a Science and an Art

• For a good survey:
  – You must ask the right questions
  – Respondents must understand your questions
  – Respondents must know the answers
  – Respondents must be willing and able to tell you the answers

• And remember, always pretest!

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What We Have Covered

• In this lecture, we have summarized some guidelines for instrument and question design
  – General instrument guidelines
  – General question guidelines
  – General response scale guidelines

• Remember, as with any list of general rules, they’re sometimes wrong
  – Use these guidelines as a starting point, not as dogma that must be rigidly followed