Creating Effective User Surveys
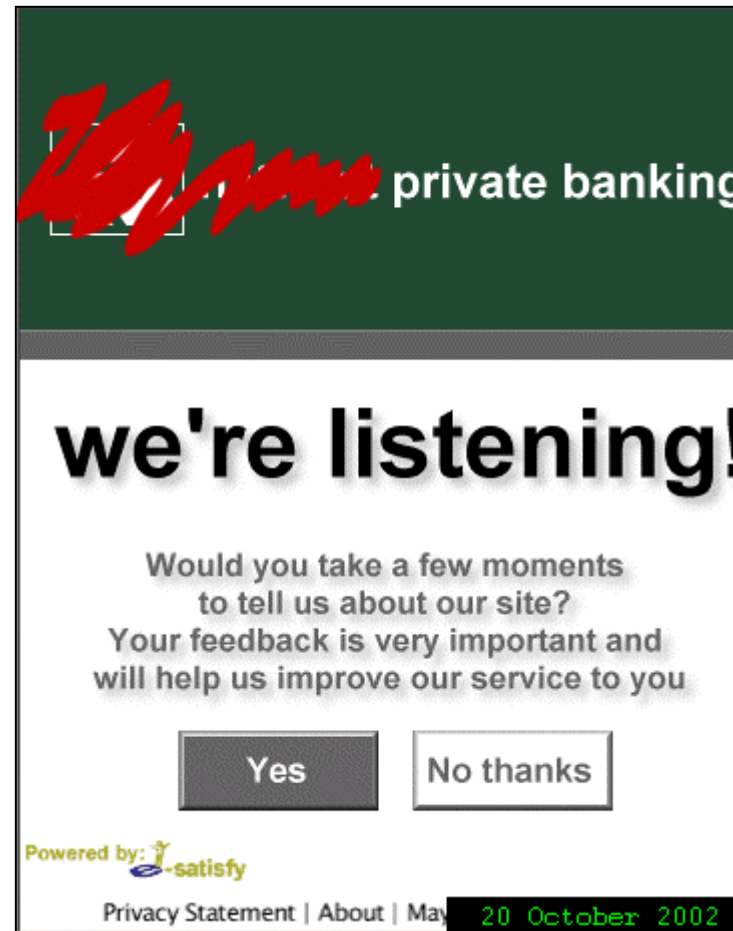
Karen Bachmann, Seascape Consulting

Outline

- Choosing the survey method

- Improving response rates

- 10 steps to a survey

- Real-time survey design and delivery (also known as Q&A)

Example Questionnaire

- Customer satisfaction questionnaire

- How good is the web site and service?

- Only interested in visitors to the site

Example survey

Screen 1 (left)

private banking

About the survey

Thank you for clicking through! The whole process should only take about 2-3 minutes.

In the survey, we will ask some questions about

- your experience of this site
- your experience of the Internet, and finally
- who you are

Click Continue to start!

[continue]

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Screen 2 (right)

A few questions about the [ ] Private Banking website

What is your primary reason for visiting the [ ] Private Banking today?
- ○ To see what has changed since my last visit
- ○ To search for specific information
- ○ To browse the content
- ○ To make my regular visit to this site
- ○ Other

How often do you visit [ ] Private Banking?
- ○ This is my first visit
- ○ Less than once a week
- ○ Once a week
- ○ 2-3 times a week
- ○ 4-6 times a week
- ○ Once a day
- ○ More than once a day

[continue]

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Start ▬▬ Done!

Need help? | Exit Survey

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Example survey

Definitions

- **Survey**: planned method of finding something out

- **Questionnaire**: formal series of questions, sometimes with choices for answers

- **Interview**: planned discussion of a topic

Interview or questionnaire?

Interview

- Talk to the user
- Interviewer captures the answers
- Flexible
- Requires small samples

Face-to-face data collection

CATI

Questionnaire

- Do not talk to the user
- Receive written answers from user
- Inflexible
- Supports large samples
- Face-to-face data collection
- CATI
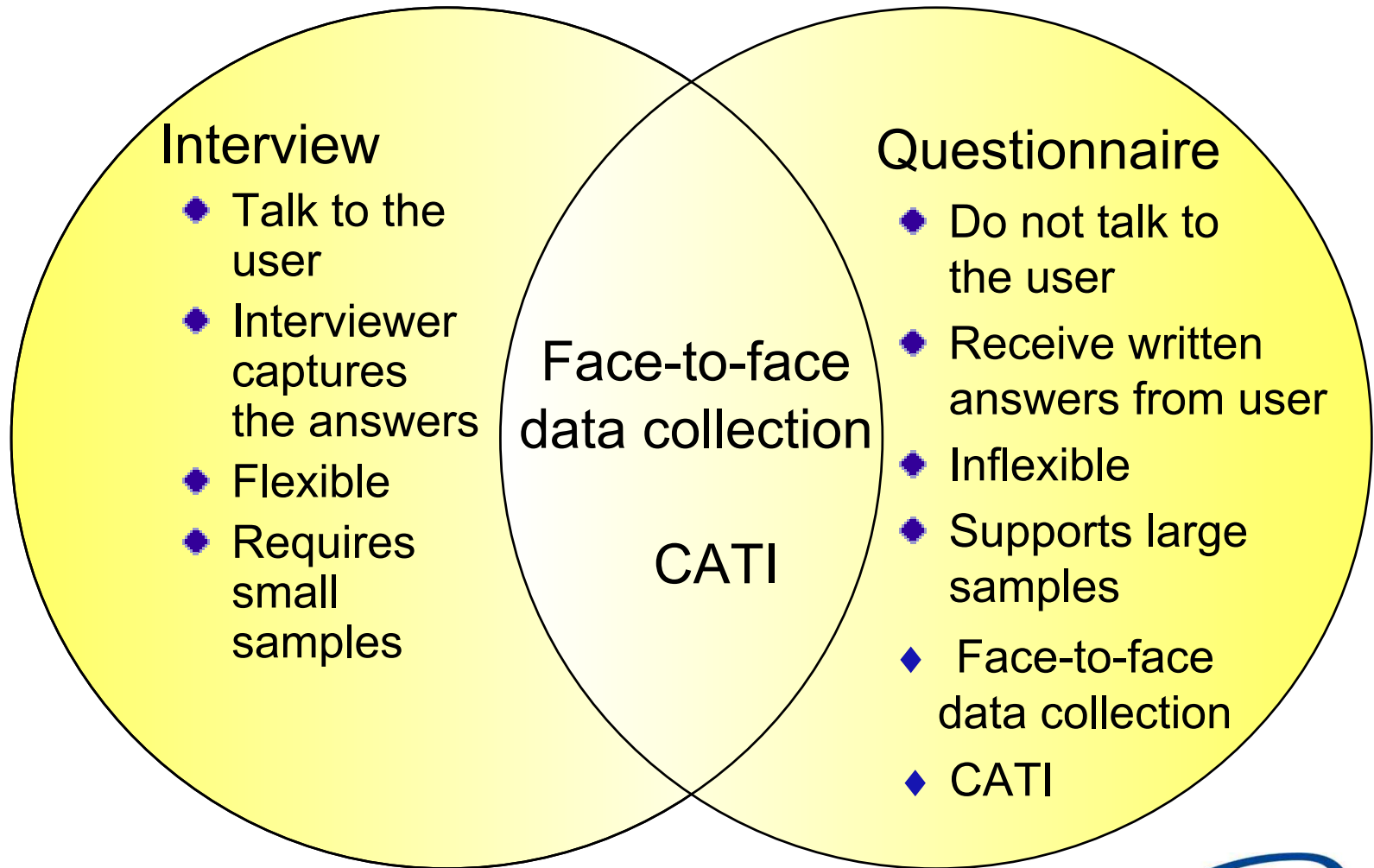
Poor (but typical) choice of method

- Decide to do a survey
- Write some questions
- Circulate internally 'for comment'
- Revise
- Administer
  - By email to everyone
  - As a pop-up window to every site visitor
  - By including in every manual

Ideal method: Iterative information gathering

Telephone or electronic interview

Face-to-face interview

Short questionnaire

Detailed questionnaire
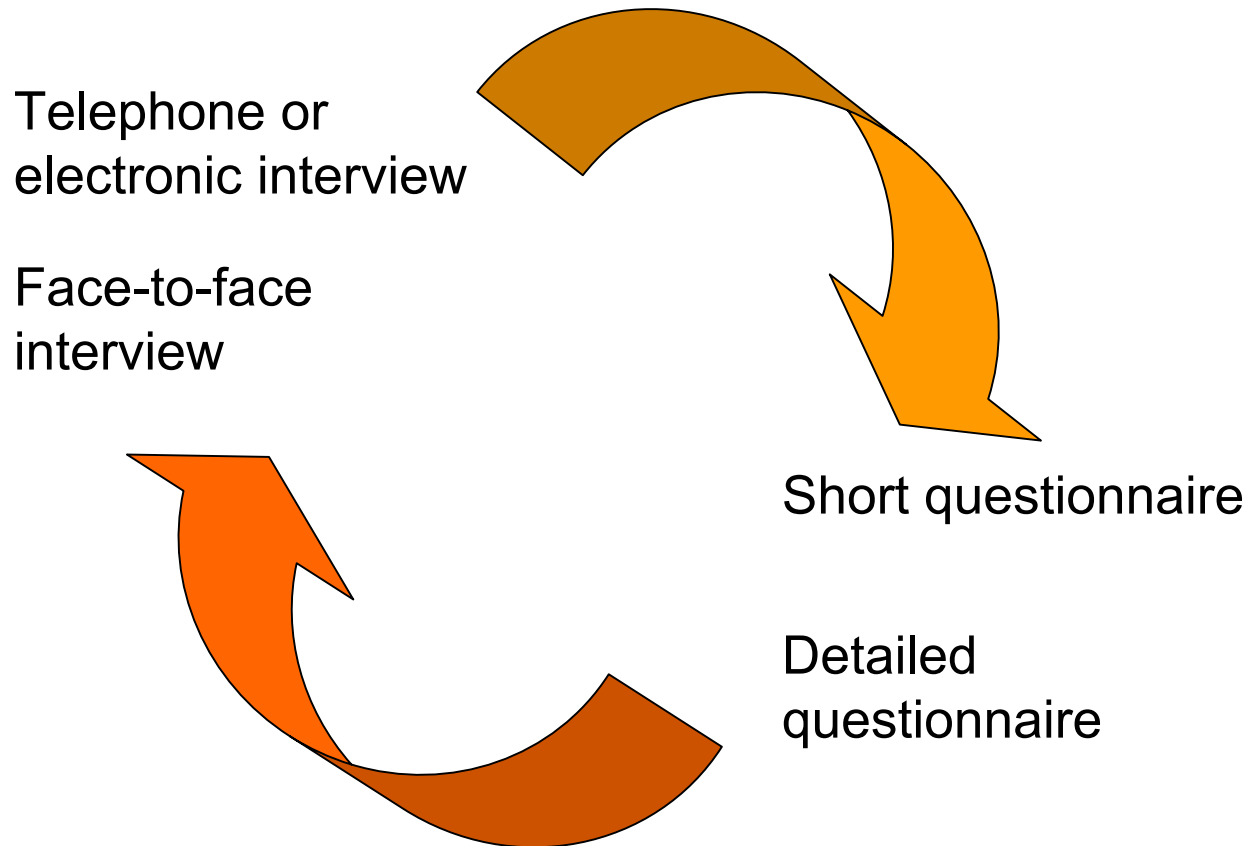
When NOT to do a user survey

- Don't yet have a business definition of the users

- Forced to use a method that doesn't match the time available

- Can't do anything with the results

Improving response rates

To improve response rates

- Establish trust

- Increase perceived rewards

- Reduce social costs

from Dillman (2000)

Establish trust

- Show appreciation in advance
- Sponsorship by legitimate authority
- Make task appear important
- Invoke other "exchange relationships"

adapted from Dillman (2000)

Increase perceived rewards

- Show respect for the respondent
- Immediate incentive (not deferred)
- Make the questionnaire interesting
- Communicate scarcity of response opportunities

adapted from Dillman (2000)

Reduce social costs

- Request answers, not demand
- Make questionnaire short and easy (but not ridiculously so)
- Minimise requests for personal information

adapted from Dillman (2000)

Your views: Example survey

- Establish trust
- Increase perceived rewards
- Reduce social costs

10 steps to a user survey

10 steps

Preparation

1. Set goals
2. Decide on target group
3. Interview target users

Production

4. Create content
5. Decide on delivery
6. Test
7. Revise for final survey

Delivery

8. Conduct
9. Compile and analyze responses
10. Publish results

1. Set goals for the survey

- What question are you trying to answer?

- How do you need
  to use the information?

- When do you need
  the information?

2. Decide on the target group

- Who are they?
- Do they all own the same information?
- Census or sample?
- Do they want to tell you the information?
- How will you find them?

3. Interview some target users

- Check that you have the right group
- Establish correct language
- Find out what they want to tell you
- Validate and refine your goals

4. Create the content: Write questions

- Mix question types: choice and open

- Use appropriate, unambiguous language

- Avoid leading questions

- Present one question at a time

- Keep questions concise

- Write to your respondent ("active voice")

4. Create the content: Organize the questions

- Keep to one topic at a time
- Start with "easy" questions
- Move from less invasive to more invasive
- Minimize requests for personal information

4. Create the content: Write a preamble

- Provide sufficient and clear instructions
- Tell respondents what the survey is for
- Can they receive results if interested?
- Are responses anonymous or confidential?
- Maximum of 150 words

Comment on preamble

5. Decide on delivery format

Delivery Format	Good for	Problem
Mail	anonymity	slow
Website	anonymity	sampling
Email	interested respondents	privacy spam
Telephone	direct interaction	time-consuming
Face-to-face	direct interaction	time-consuming, costly

6. Test the survey

- Is the time involved to complete the survey appropriate?

- Are questions clear and unambiguous?

- Are you targeting the correct group?

- Is the survey interesting for the respondents?

7. Prepare the final survey

- Use the test findings to refine the survey
- Try analyzing the results
- Check the results against the survey goals
- Eliminate off-topic questions
- Confirm delivery method for target group

8. Conduct the survey

- Schedule the necessary time for delivery of the survey
- Plan to send a reminder message to target users
- Deliver the survey
- Thank participants

9. Compile responses …

Number of Responses	Compile Using
Up to 100	Spreadsheet
100 to 1000	Database
Over 1000	Specialist software such as SPSS

9. … Analyse responses

Numerical responses   →   Calculate

Qualitative responses   →   Group

Be prepared for surprises

Beware of false statistics:

    3 positive responses in 5 users is 3 in 5, not 60%

    Unlikely to have enough data for any decimal places and may need to round to nearest 10%

    5-point scales are best reported by adding the outside positive views together and the outside negative views together

"I've finished the report for you"

10. Publish results

- Don't surprise people with bad news

- Make sure publication is timely

- Keep reports short

- It's OK to have some gaps in the results, "more work needed"

Questions

References / further reading

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  Mail and Internet Surveys: The Tailored Design Method
  John Wiley & Sons Inc, New York ISBN: 0-471-32354-3

- A. N. Oppenheim (1992)
  Questionnaire Design, Interviewing and Attitude Measurement
  Pinter Publishers Ltd, London ISBN: 1-85567-044-5

- Priscilla Salant and Don A. Dillman (1994)
  How to Conduct Your Own Survey
  John Wiley & Sons Inc, New York ISBN 0-471-1273-4

- JoAnn T. Hackos and Janice C. Redish (1998)
  User and Task Analysis for Interface Design
  John Wiley and Sons, Inc. New York. ISBN: 0-471-17831-4

Example Web Survey Services

- Survey Monkey (www.surveymonkey.com)
  - Professional subscription: $19.95/month
  - Basic subscription: Free

- Zoomerang (www.zoomerang.com)
  - zPro subscription: $599/year
  - Basic subscription: Free

About Karen

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Karen designs user interfaces that increase the efficiency, effectiveness, and satisfaction of software users. She brings usability into the earliest stage of development and creates clear usability requirements that keep a project focused on the user.

She also helps companies new to usability learn how to implement usability practices within their existing development processes

With thanks to Caroline Jarrett of Effortmark Ltd (Caroline.Jarrett@Effortmark.co.uk) for her help developing this presentation. Caroline is an independent usability consultant who specialises in forms: on the web, on paper, and business processes involving forms.