7TIPS

for creating

SUCCESSFUL
Online
Surveys

Bramm Research Inc.
Better Information. Better Solutions.

3RD Edition

7 Tips For Creating Successful Online Surveys – 3rd Edition

Presented by
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As the title indicates, this paper has been written for those looking for advice on how to develop and execute successful online surveys. Please distribute, copy or reprint this material for your colleagues and clients. My one request is that the document stay in one piece with all contact information in place.

I have received many helpful comments and suggestions regarding the first edition of this paper. I have done my best to incorporate these ideas into this update. I look forward to further input for subsequent editions.

I also want to acknowledge a debt to Dr. Keith Christopher of KC Surveys. Over the past few years Keith and I have had a number of conversations regarding survey research. These discussions are always enlightening. As well, Keith has made a number of helpful comments regarding the first edition of this paper. Thank you Keith.

You will find my bio and complete contact information in the appendix. Please contact me

if you would like a review of your project, questionnaire or results. I am also available to conduct workshops on research "benchmarking/best practices" and developing online questionnaires.

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Online Surveys – The Promise and the Peril

Introduction

The promise of online surveys

In comparison to other survey techniques, the ability to conduct online surveys allows us to gather information quickly and at a relatively low cost.

The Internet has reduced the survey production and distribution costs to almost zero. From a cost perspective - whether you are sending out 100 invitation emails or 1,000 there is no price difference. Similarly, there is no difference in tabulating 100 or 1,000 online questionnaires.

While the cost of conducting research has dropped, the time required to execute and tabulate a survey has also been vastly reduced. A study completed online takes a fraction of the time required in comparison to a traditional mail survey that entailed printing and mailing along with a lengthy tabulation process.

Over the past few years, online surveys have become increasingly sophisticated. Both the variety of questions that one can ask and the tabulation capabilities have improved. It is clear that online surveys will continue to grow in popularity at the expense of other more traditional information gathering techniques.

Online Surveys – The Promise and the Peril

The peril of online surveys

While the advantages of online surveys are considerable it is still true, as with other forms of survey research, that you get out of it what you put into it. In other words, "garbage in, garbage out".

All of the pitfalls that exist for other types of surveys exist for online surveys. These include: ill-defined objectives, poorly worded questions and low response rates. These problems can be compounded by the fact that, with an online survey, there is no guarantee that the individual you sent the survey to is indeed the person filling out the survey i.e. the link may have been forwarded on to someone else. As well, there is no opportunity to ask the respondent follow-up questions.

Our goal in this paper is to give the reader advice that will help them overcome some of the problems outlined above. It is our hope that we can help you craft a better online questionnaire that will ultimately result in the collection of more reliable information.

1. Clearly Define Your Objectives

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Step number one in the research process is to ask, "why are we conducting this survey"? Everything will flow from the answer to this question including the method and the questions you ask.

All too often, even before determining our objectives, we have decided that we need to do an online survey. In my mind, this is putting the cart before the horse. If we put our goals and objectives first we may realize that focus groups or face-to-face interviews are a far better alternative.

Therefore the most important first step in developing your survey is to clearly define your objectives.

Ask yourself...
Why are we conducting this survey?
What are my key information needs?
How will I use this information or what actions will I take
based on the information that I gather?

Your questionnaire can be measured against these objectives. "Is the question necessary? Does it satisfy one of the objectives of the study"?
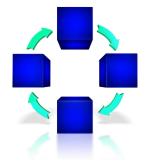
As you develop each question ask yourself how you will use the responses to this question. This process will help you separate the "need to know" from the "nice to know".

1. Clearly Define Your Objectives

1. Clearly Define Your Objectives *(continued)*

What constitutes a reasonable objective? Here's an example of a survey objective: "The purpose of this research project is to understand the information needs of stakeholders and the extent to which we are satisfying those needs." This objective will keep you on track and ultimately reduce the length of the final questionnaire.

2. The Flow of Questions

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The manner in which you organize your questions is a key tool that you can use to engage the respondent and ultimately improve your response rate.

My overall recommendation is that your questionnaire should have a coherent flow. Think of a questionnaire as a type of conversation. A conversation will typically move from one topic to another in a logical fashion. A conversation that jumps around from one topic to another in a random fashion can be exhausting.

A conversation will also move from the general to the more specific. Therefore I suggest putting your general and non-threatening questions up front. This will serve to draw respondents into the survey.

One sees a number of questionnaires that begin with demographic questions. Historically I have preferred to leave these questions to the end of the survey. My feeling has always been that they can be somewhat intrusive at the beginning. However, recent experience has changed my perspective on this. With increased time pressures and a flood of online questionnaires it is very difficult to persuade respondents to hang in with our more time demanding surveys. Therefore I am now of the view that it is important to capture that critical information up front before the respondent hits the proverbial "fatigue" wall and heads for the exit. As well, the demographic questions are typically used in our analysis e.g. we break the results down by age and gender. If these questions are at the end of the survey the responses may not be available to us when it comes to developing our tabulation plan.

3. Question Wording

3. Question Wording

As you develop your questionnaire, continually ask yourself, "will the respondent understand this question? Is the language appropriate for the respondent?"

Always remember to keep it simple and avoid complicated language. As well, avoid ambiguous and vague words.

Ask yourself, "Is there common agreement in the terms I am using"? For example, we might use, "In the past year have you bought computer equipment?" Do we mean since the beginning of the year or the past 52 weeks?

Give very precise instructions for each question e.g. instruct the respondent to check "one box only" or "check all that apply". It's a good idea to emphasize important words in the question or instructions.

If you are providing the respondent with a list of alternatives in a close-ended question, make sure that the list of responses contains all possibilities. This list should give them the opportunity to check "other". This can be followed with "please specify" and a text box so that you can capture this information.

Also allow for the possibility that the respondent will not know the answer or that the question is not applicable. Therefore, it's usually a good idea to include "don't know" or "not applicable" as a possible choice.

3. Question Wording *(continued)*

Close-ended vs. Open-ended Questions

Open-ended questions should be used sparingly. Yes…they can be a source of rich information but there are two potential problems. First of all, respondents will quickly tire of completing open-ended questions. Second, when you are dealing with the results it will be advantageous to take the open-ended responses and group them into categories. This "coding" of responses can be quite challenging and time consuming.

My recommendation is to use no more than two or three open-ended questions throughout the survey. It is always a good idea to place one at the end of the survey that will allow the respondent to vent or express opinions that they haven't had a chance to express throughout the survey. A typical wording might be: "Do you have any final thoughts or opinions regarding the topics discussed in this survey?"

Rating Scale questions

Frequently we will ask respondents to rate their level of interest in a particular service or product concept. The question may be worded along these lines… "Using the following scale, please rate your interest in the following concepts."

In this scenario, the question becomes, do we use an even-numbered scale e.g. "4 points" or do we use an odd number scale e.g. "5 points". Furthermore, do we use a verbal scale e.g. "very interested", "somewhat interested", "not very interested" or "not at all interested". Or, do we use an arithmetic scale e.g. "If 'very interested' equals 4 and 'not at all interested' equals 1 what number would you pick between 1 and 4 to indicate your level of interest"?

3. Question Wording *(continued)*

While a complete discussion of the merits of a "four point" versus "five point" scale and a verbal versus an arithmetic scale is beyond the scope of this paper I will give my biased opinion.

Clearly, if you use a five point scale you are giving the respondent the opportunity to "sit on the fence" if they choose the mid-point. Many researchers prefer to force a choice and use an even point scale so that the respondent will be forced to express a leaning one way or the other. I, on the other hand, don't mind giving respondents the chance to fence sit. I believe that this is a more "real world" situation.

With regards to verbal and arithmetic scales, I generally prefer using an arithmetic scale. It is my belief that such a scale allows for a more precise response. In other words, I think that there is less ambiguity when using numbers as opposed to a verbal scale.

One final note to end this chapter – always build a pretest into your schedule. Taking the time to have a handful of respondents review the questionnaire will insure that they understand the meaning of the questions and the instructions being used.

4. Words and Questions to Avoid

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Here's a list of items that you will want to avoid in the construction of your questionnaire.

1. Avoid any words that may be unclear to a respondent e.g. vernacular, acronyms, or other unfamiliar words.

2. Avoid modifying adjectives such as: usually, often, sometimes, occasionally, regularly. These terms can mean different things to different respondents.

3. Avoid double-barreled questions e.g. "How would you rate us for our durability and reliability"? The respondent may feel that you offer a highly durable product but one that has reliability issues.

4. Avoid words that are emotionally laden or words that contain a sense of approval or disapproval. If you do want to evaluate an emotional reaction to a topic you may want to state the question in the following way, "Some respondents we have talked to are very upset about the proposed legislation. Do you agree or disagree with these respondents?"

5. Avoid asking respondents to answer questions that are difficult, that rely too much on memory or require the respondent to guess. In the same vein, avoid questions that ask respondents to make difficult estimates e.g. "how many times in the past year have you purchased toothpaste"? In this example, it would be easier to answer the question if the time frame was expressed in months.

4. Words and Questions to Avoid

6.   Avoid the use of hypothetical questions e.g. "What would you do if 'x' happened". Also recognize that questions about future behaviour are inherently unreliable. Keep in mind that people have a hard time predicting what they might do or think next year, next month or even tomorrow.

7.   Avoid ranking questions e.g. asking a respondent to place a list of items in descending order of importance. In my experience, this is a difficult task for a respondent given that it requires them to first review an entire list and mentally juggle all items as they place them in ranked order. As well this ranking exercise doesn't take into account that some items on the list may be judged to be equal in terms of their importance.

5. Improving Your Response Rate

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The response rate is determined by dividing the number of people who completed a questionnaire by the total number of people who were eligible to participate in the survey. If, for example, we sent out 1,000 invitations to take part in a survey and 250 respondents completed our questionnaire, the response rate is 25%.

By improving our response rate we increase the reliability of the survey results. A low response rate leaves us wondering if responders are different in some way from those who didn't respond. In other words, are our respondents representative of the total sample universe or are they atypical?

Here are a few tips on how you can improve your response rate and improve your confidence in the results of your survey.

1. Generally there is a direct correlation between the length of the questionnaire and the response rate i.e. the shorter the questionnaire the better the response rate.

2. Ask yourself, would I take the time to fill out this questionnaire? If the answer is "no" you may want to rethink some of the questions. Also, find a way to make the questions and topic relevant to your audience.

5. Improving Your Response Rate

3. Get third party endorsement. In my experience the response rate improves with the endorsement of, for example, an association or a publication.

4. Use an incentive. I will go into more detail about incentives in the last chapter of this paper. Suffice it to say that using an incentive will improve your response. Typically, we offer to enter the names of all those who participate into a draw for a cash prize or for a product, for example, the latest technological gadget.

As a way to build the response rate to your surveys on an ongoing bases I would suggest that you pay particular attention to the follow-up phase of your project. This is where you thank your respondents for participating in the survey. But more importantly you tell them the top two or three findings of the research, how you are going to respond to these findings and when.

This "thanks, what and when" process closes the loop. It rewards your respondents and lets them know that they've been heard. This also encourages them to participate in future research initiatives. Finally, it insures that you are committed to following through on what you've uncovered.

6. The Invitation to Participate

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You will want to spend time crafting your email invitation. Here are the elements that your invitation should include:

1.   Clearly state the purpose of the survey. This is your chance to answer the respondent's natural question "…what's in it for me?" Explain why you are doing this survey and why this is relevant to the respondent.

2. Confirm with respondents that their responses will be confidential and that they will not be re-contacted as a result of completing the survey. You may want to use a wording along the lines of…"your responses are completely confidential. Results will only be shown in an aggregated format."

3. I usually send out three or four reminders to respondents who have not completed a survey. To avoid annoyance, be sure to remove the email addresses of those who have already responded. In the body of the reminder let people know that the response to date has been excellent. When I send out the final reminder, I put "final reminder" in the subject line. This is usually sufficient to motivate those who have been putting off completing the survey.

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4. Recent experience has proven to me that there is an advantage in having a survey cut-off date. This will give a sense of urgency to the completion of the questionnaire. I suggest that your fieldwork (data collection period) be approximately three weeks in duration.

5. Finally, I would suggest sending out a pre-announcement before sending out the actual survey invitation. This pre-announcement serves to signal the importance of your project.

7. Incentives

7. Incentives

I almost always include an incentive as a method of improving the response rate. One has to balance the cost of the incentive with the impact on the response rate. A few years ago I was involved in a traditional paper survey in which we mailed out a ten dollar cheque attached to the questionnaire to all potential respondents. Our response rate was over 60%. However, very few studies have the budget for this type of incentive. As an interesting side note, almost no one cashed their cheque if they hadn't completed a survey.

Here are a few ideas that have worked well in the past and won't break the bank:

- Send all those who responded to the survey a copy of the results. Of course, this will be dependent on the nature of the survey. If you are creating a report that will have a monetary value e.g. a benchmarking/best practices report, you can offer the respondent a significant reduction in the price of the final report.

- Enter the respondents' name into a draw for a cash prize, or a draw for a prize that is relevant or consistent with the profession of those you are surveying.

- Make a charitable donation based on the number of responses you receive. In other words, the more responses you receive, the greater the donation.

Final Thoughts

Final Thoughts

As mentioned in the introduction, online surveys are becoming increasingly popular. They offer an efficient and relatively inexpensive method of collecting information.

However, they are not the only tool in the box. We need to let the objectives drive the methodology and not the other way around. As the old saying goes, "if the only tool I have is a hammer then pretty soon every problem starts to look like a nail."

About the Author

For more than 20 years Gerald Bramm has operated Bramm Research (http://www.brammresearch.com) a firm specializing in marketing research assignments primarily for business-to-business clients.

His focus is on industry outlook and benchmarking/best practices surveys for associations and industry publications. He has worked in dozens of markets both in Canada and the U.S. and has a broad experience in all manner of survey research, from large scale online surveys to focus groups and individual interviews.

Prior to starting his own company, he was the Director of Research at the Southam Business Information Group (now the Business Information Group). Before that he was the Research Director at J. Walter Thompson in Toronto and Montreal.

Gerald has been a member of the MRIA (Marketing Research and Intelligence Association) for 26 years. He holds the CMRP designation (Certified Marketing Research Professional).

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