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Survey Questionnaire Methodology And Purpose

There are a variety of ways to achieve measurable answers to any number of marketing questions. The methods researchers have available to them include qualitative and quantities methodologies, in the broadest sense. Specifically, these methodologies may exhibit themselves as focus group research methods, executive interviews, one-on-one interviews, written questionnaires, internet questionnaires, blind testing, and more. The method employed by the researcher is totally dependent upon the nature of the question and the objectives of the market research.

General Attributes of Survey Research

There are general attributes that all surveys share.

Primary Level:

- Survey Objectives:

Each survey must begin with an objective in mind. Or more simply stated, a survey begins with a question that requires an answer for an organization to plan, move forward, and achieve measurable results. A survey, then, is a standardized list of questions that eliminate the chance elements of general opinion and interviewer bias. However a survey may be formulated, the very nature of a survey's existence is based on the objectives the research needs to accomplish.

- Respondent Information:

Every respondent has information, and the survey is required to draw this information out in order to shape a statistically correct "picture", if you will, of public opinion, target market attributes, likes and dislikes. Of course, this assumes that the respondent pool has been chosen well. For instance, it would make little sense to send out 500 surveys to the general population in order to determine the current level of satisfaction with childcare options in the living area. That general population would include people who are retired, or who may be in middle or high school, and would have no real opinion on the issue. However, the proper target market's responses on this matter, or any matter that directly impacts an organization, its product, service, plans or profit, is of paramount importance.

With these two primary level aspects in hand, the market researcher then moves to the following, in order:

- **Questionnaire Design and Dissemination**
- **Data Analysis**
- **Findings**
- **Recommendations of the Researcher**
- **Managerial Action on those Findings**

- Questionnaire Design

Whether the methodology is telephone surveying, a written survey, or an internet questionnaire, there are 10 steps to designing a successful questionnaire.

1. Determine the survey objectives, resources and constraints

The objectives of the survey should be clearly spelled out and agreed to by all parties within the organization who are stakeholders. Those stakeholders should all have input into this part of the research. Unless there is agreement, the result of the research is predictable; disaster. Secondary research sources should be investigated and their merits discussed before proceeding to the primary research phase of the survey. There is little need to cover ground already covered previously, if in fact that research is valid. Any organizational objectives of the research that the research cannot answer should be spelled out by the research professional.

2. Determine the Data Collection Method

The data collection method will have a strong impact on the questionnaire design. A self administered survey must be rather short, and explicit. Internet surveys can be more specific through the use of multi media to further explain a point or demonstrate choices. A written survey needs to be clear in the directions it gives to the respondent. Telephone surveying, although a less than desirable method, can be effective for short surveys and has the advantage of an interviewer to provide more explanation.

The choice of the survey method will often be determined by the very objectives the research must accomplish.

3. Determine the Question Response Format

There are three types of survey question:

- Open Ended (“How do you feel about...”)
- Closed Ended (True/False. Yes/No)
- Scale Response (“On a scale of 1 to 5, please rate the following...”)

Each of these types of questions has their strengths and their weaknesses.

In some cases, especially if there is an interviewer present, they may be used in combination with each other. In other cases, such as in a written survey where there is no interviewer present, the answer to an open ended question simply defies proper coding and therefore becomes extremely difficult to quantify. Using a “Skip Method” approach to questions, the researcher could begin with a closed ended question and, depending upon the response, either take the respondent to a scale response question to explore the answer in greater detail, or have the respondent “skip” the scale response question altogether. Proper coding of the survey for data entry and/or effective interviewer training is of paramount importance in this instance.

In every case, the researcher must consider the respondent’s ability and willingness to answer a question.

4. Establish Questionnaire Flow and Layout

Every questionnaire has a flow to it. It carries the respondent along and makes the survey seem simple and engaging. *The flow of a survey is as follows:*

- **Screening Questions:** qualifying questions to identify the target market and their value to the research.
- **First Few Questions:** Designed to “warm up” the respondent with simple, general, and easy to answer questions to demonstrate the ease of the survey and engage the respondent.
- **First Third of Questions:** Transitioning to more difficult questions relating to the research objectives.
- **Second Third of Questions:** Difficult or complicated questions which are now asked because the respondent has committed him or herself to the task, and it is made clear to the respondent that the survey is almost complete.
- **Last Third of Questions:** Classification and demographic questions that are personal in nature to provide strong analysis of the data by education, income, age, etc. These questions may, in a written survey, be left blank by the respondent, and so are at the end of the survey.

5. Evaluate The Questionnaire

Just as with a letter or written essay, the researcher must step back and critically review the survey. Is it too long? Length of a survey is really in the eye of the beholder, or, in this case, the respondent. Are all the questions necessary? Every question must serve a purpose, and that purpose is directly related to the objectives of the research itself. Avoid at all costs the aspect of “It would be nice to know.....”, because generally, they detract from the objective itself. Test the survey with a staff member to gauge reactions and review the flow.

6. Obtain Approval Of All Relevant Parties

The same stakeholders we spoke of at the beginning must approve this revised first draft of the survey. By doing so, they will have had their input into the research, and placed their tacit “stamp of approval” on it. There can be no negative ramifications for the researcher if those he or she is providing the research for have viewed the questionnaire, and been given ample opportunity to revise, delete, add or subtract from or to it.

7. Pretest and Revise

A small sample group needs to be gathered and the questionnaire must be pretested. This is literally where “the rubber meets the road”. Researchers must look for misinterpretations by the respondents, lack of continuity, poor skip patterns, confusion on the part of respondents or interviewers, poor coding for data collection, and general respondent reaction to the survey or interview. The pretest group should be interviewed immediately following the pretest to determine areas for improvement.

8. Prepare Final Questionnaire Copy

Precise instructions for skip patterns, numbering, and pre-coding must be set up and checked, scripting must be proof read, instructions must be clear, and the survey needs to be professional in its overall presentation whether it be written or verbal.

9. Implement The Survey

Proper sampling must be determined in order to achieve and deliver a given confidence level and interval level, and coding instructions must be provided to research data collection professionals. If interviewers are involved, they need to be properly trained and rehearsed in their presentation. In written surveys, direct mail response rates must be paid attention to, and attention given to those factors that may alter those rates of return such as “Return Postage Paid”. Other factors such as a free gift for responding to the survey, or a grand prize drawing of a number of respondents can also affect return rates.

10. Analyze The Data

Also known as “number crunching”, a complete analysis of responses with breakouts by age, income, education, geography and other factors should be provided, based on the research objectives. Typically, the most easily understood format is bar graphs, pie charts, and other visual aids to help the client better comprehend the research results. There are a number of software packages available commercially that can make this part of the research far more streamlined.

If done correctly, survey methodology can hold important keys for any market research professional in terms of determining direction, achieving objections, and providing an organization with a clear set of recommendations for progress and profit.

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