

# COMMON MISTAKES IN SURVEY DESIGN

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# OVERVIEW

THE MISTAKES	THE SOLUTIONS
THE QUICK AND EASY SURVEY	COLLABORATION
DEATH BY A THOUSAND CUTS	MINIMIZATION
CARPE DIEM	PREDETERMINATION
LIES, DAMN LIES, AND STATISTICS	ORGANIZATION
COMPLICATED MINIMALISM	SIMPLIFICATION
MUGGING	CONSIDERATION
REINVENTING THE WHEEL	EXPLORATION
GREAT EXPECTATIONS	ANTICIPATION
COMPULSORY VOLUNTEERISM	LIBERATION
FLYING SOLO	VALIDATION

## THE MISTAKE - THE QUICK AND EASY SURVEY

The Mindset - "Let's just slap a survey together and see what we find!"

## THE SOLUTION - COLLABORATION

Collaborate with a survey expert to find out...

- ...if a survey is the best option
- ...how a survey influences customers and visitors
- ...how to reach different populations
- ...how to craft an valid and effective survey
- ...if you need to work with an external vendor
- ...what tools are available
- ...the best methods for working with survey data
- ...if you'll be able to get enough responses

## THE MISTAKE - DEATH BY A THOUSAND CUTS

The Mindset - "If we have them there, we might as well ask them everything. Who knows, we might want to take a look at some of that stuff down the road."

## THE SOLUTION - MINIMIZATION

Minimize the number of questions in your survey

Keep surveys short and focused on important questions

Ask only about what you need learn

Avoid asking for personally identifying information

Consider the respondents point of view

- Will they be motivated to answer your questions?

- Will they be able to answer your questions?

## THE MISTAKE - CARPE DIEM

The Mindset - "Let's not worry about what to do with the data until we actually have some."

## THE SOLUTION - PREDETERMINATION

Predetermine your post-survey plan

Predetermine how the data will be analyzed

Predetermine what you will do with what you find

Predetermine what will happen to the data when you are done

# THE MISTAKE - LIES, DAMN LIES, AND STATISTICS

The Mindset - "If we want our numbers to look good, we should ask about this stuff first."

## THE SOLUTION - ORGANIZATION

Organize your survey to maximize participation and minimize bias

Start with a question that's interesting to respondents

Ask your most critical need-to-know questions second

Randomize questions when possible

Account for context and order effects

If you need demographic information, ask for that last

## THE MISTAKE - COMPLICATED MINIMALISM

The Mindset - "The survey needs to be short, so let's consolidate those six questions into one."

## THE SOLUTION - SIMPLIFICATION

Simplify the questions and response options

Maximize clarity and focus of every question

Minimize punctuation, conjunctions, words, and time lags

Eliminate double-barreled and leading questions

Avoid jargon, slang, acronyms, examples, and ambiguity

Avoid drop down response boxes in online surveys

Use 6 or 7 options for scalar responses

Avoid using more than 10 categorical responses

## THE MISTAKE - MUGGING

The Mindset - "We should leverage this opportunity to let our customers know about all the great products and features we've added."

## THE SOLUTION - CONSIDERATION

Show consideration for those who are answering your questions

Remember that respondents are doing you a favor  
You're goal is to collect information, not distribute it

MUGging compromises the integrity of surveys  
MUGging violates implicit agreements made with respondents  
MUGging creates ill-will  
MUGging makes it difficult to get good data in the future



## THE MISTAKE - REINVENTING THE WHEEL

The Mindset - "I'm not fond of the typical survey questions, so we'll need to make our own."

## THE SOLUTION - EXPLORATION

Explore the tools that others have used to answer similar questions

Use measures common to your industry

Examine research that has evaluated different questions

Talk to survey experts to find out which questions work

Investigate the different survey building tools that are available

Don't rely on a vendor's sales pitch

## THE MISTAKE - GREAT EXPECTATIONS

The Mindset - "Our 100 customers in Common Town, USA should give us enough data to answer our questions."

## THE SOLUTION - ANTICIPATION

Anticipate low response rates

Many general population surveys have response rates below 2%

You may need hundreds of responses to make valid conclusions

Determine if your target groups will be motivated to participate

Calculate the number of people you should ask to participate

$$\text{Number asked} = \text{Number needed} \times \text{Anticipated response rate}$$

## THE MISTAKE - COMPULSORY VOLUNTEERISM

The Mindset - "These questions are critical, so we should make responses mandatory in the survey."

## THE SOLUTION - LIBERATION

Give respondents the freedom to not answer questions

Requiring responses may be appropriate if incentives are used

But, be aware that incentives may lower data quality

Requiring responses can also increase drop-off

If possible, avoid incentives and make every response optional

A short, clear survey works better than requiring responses

## THE MISTAKE - FLYING SOLO

The Mindset - "It's just a simple survey, how hard can it be?"

## THE SOLUTION - VALIDATION

Validate your survey before putting it in the field

Ask colleagues to proof and comment on the survey

Ask a survey expert to proof and comment on the survey

Observe a few people as they take your survey

Test different versions to see which works best

# IF YOU WOULD LIKE TO LEARN MORE ABOUT HOW TO DESIGN EFFECTIVE SURVEYS

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