Using surveys to uncover audience insights

Caroline Jarrett
@cjforms
#SurveysThatWork

Today's agenda - a survey discussion

Me talking about surveys   about 30 minutes

Us chatting about surveys   about 30 minutes

Caroline Jarrett @cjforms

I found this in a set of standards

Get user feedback on content:

Agencies should provide a feedback mechanism for users to report satisfaction or dissatisfaction with each web page or piece of web content, which enables the public to identify potentially inaccurate, outdated, confusing, or duplicative content. Agencies are encouraged to continuously monitor, measure, and optimize content for performance so the public get the answers they need.

I worry about linking dissatisfaction to next steps

Get user feedback on content:

Agencies should provide a feedback mechanism for users to report satisfaction or dissatisfaction with each web page or piece of web content, which enables the public to identify potentially inaccurate, outdated, confusing, or duplicative content. Agencies are encouraged to continuously monitor, measure, and optimize content for performance so the public get the answers they need.

Report satisfaction or dissatisfaction?

Let's try a thought-experiment

Caroline Jarrett @cjforms   Photo by Jailam Rashad on Unsplash
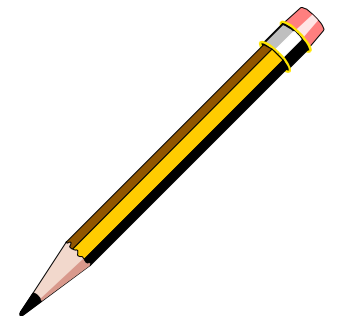
Satisfaction is a slippery concept

Caroline Jarrett @cjforms

Image credit: Photo by Ethan Robertson on Unsplash

Satisfaction is a complex matter

Compared experience to what?	Resulting thoughts
(nothing)	Indifference
Expectations	Better / worse / different
Needs	Met / not met / mixture
Excellence (the ideal product)	Good / poor quality (or 'good enough')
Fairness	Treated equitably / inequitably
Events that might have been	Vindication / regret

It's not clear HOW to change the content

Get user feedback on content:

Agencies should provide a feedback mechanism for users to report satisfaction or dissatisfaction with each web page or piece of web content, which enables the public to identify potentially inaccurate, outdated, confusing, or duplicative content. Agencies are encouraged to continuously monitor, measure, and optimize content for performance so the public get the answers they need.
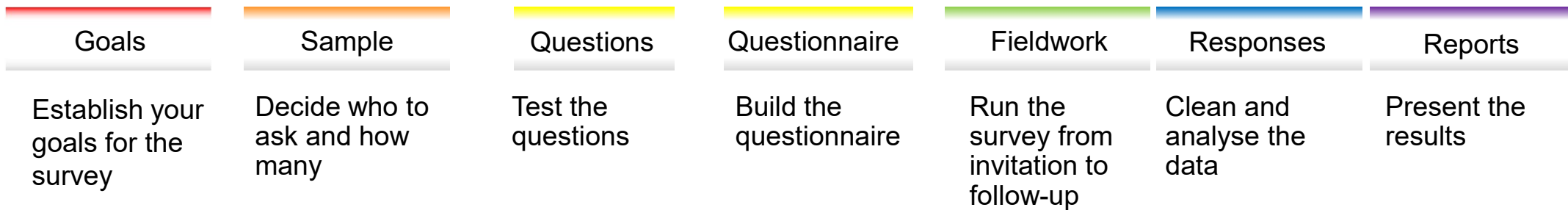
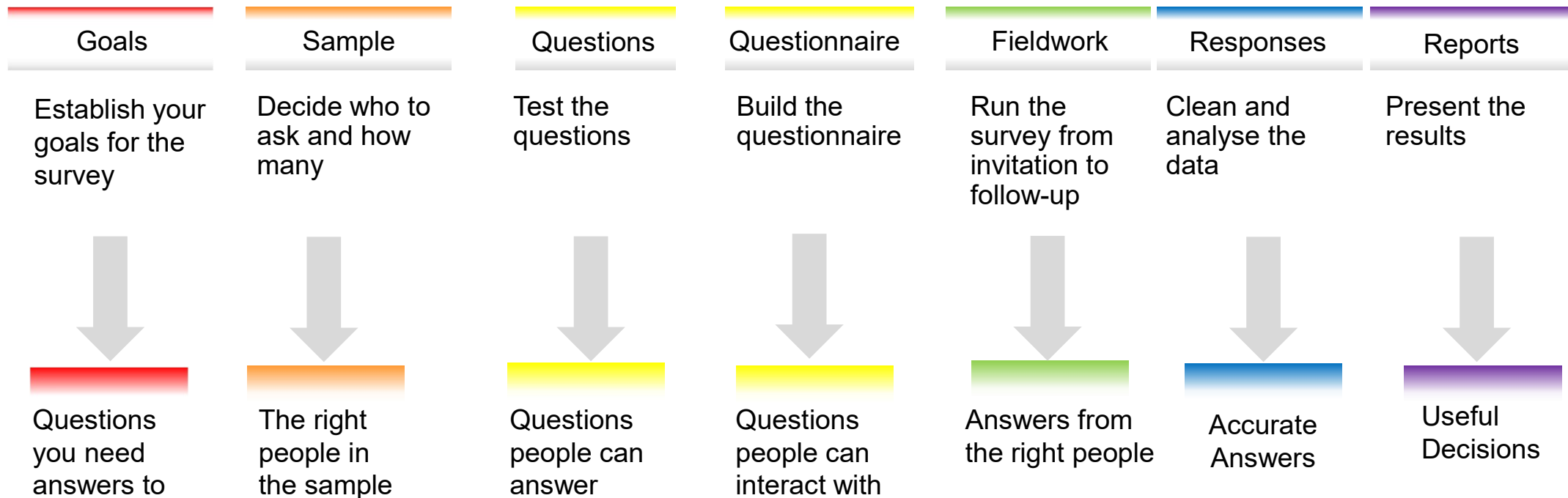Report satisfaction or dissatisfaction?

Decide how to optimize content?

Caroline Jarrett @cjforms   (CC) BY SA-4.0

Takeaway

Good surveys are about using the insights to make good decisions

Caroline Jarrett @cjforms (CC) BY SA-4.0

Here is my process in stages

Goals	Sample	Questions	Questionnaire	Fieldwork	Responses	Reports
Establish your goals for the survey	Decide who to ask and how many	Test the questions	Build the questionnaire	Run the survey from invitation to follow-up	Clean and analyse the data	Present the results

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You get a good survey by doing many things well

Goals	Sample	Questions	Questionnaire	Fieldwork	Responses	Reports
Establish your goals for the survey	Decide who to ask and how many	Test the questions	Build the questionnaire	Run the survey from invitation to follow-up	Clean and analyse the data	Present the results
↓	↓	↓	↓	↓	↓	↓
Questions you need answers to	The right people in the sample	Questions people can answer	Questions people can interact with	Answers from the right people	Accurate Answers	Useful Decisions

The goals set the scene for the survey

Goals

Establish your goals for the survey

Questions you need answers to

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Establish the goals for your survey

What do you want to know?

↓

Why do you want to know?

↓

What decision will you make based on these answers?

↓

What number do you need to make the decision?

For example, I was writing a blogpost

What do you want to know?

"Which topic is most interesting?"

⬇

Why do you want to know?

"To write the most useful blog post"

⬇

What decision will you make based on these answers?

"Pick one of the available topics"

⬇

What number do you need to make the decision?

"I'll pick the topic with most votes"

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A survey is a quantitative method

What do you want to know?

↓

Why do you want to know?

↓

What decision will you make based on these answers?

↓
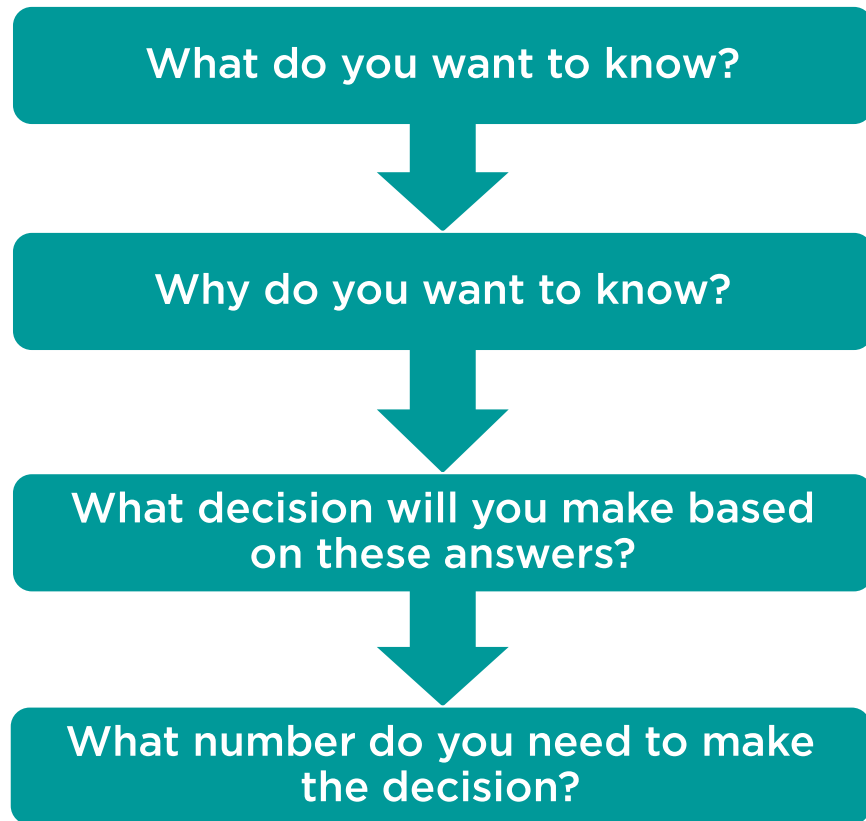
What number do you need to make the decision? ← The result of a survey is a number

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Don't confuse two sorts of number

A number of responses

20 people chose a topic

The number which is
the result of the survey

75% want topic A

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Here's an example of thinking about goals

What do you want to know?	*"Is our content working?"*
↓	
Why do you want to know?	*"We want meet our users' needs"*
↓	
What decision will you make based on these answers?	*"We will change pages where we get negative feedback"*
↓	
What number do you need to make the decision?	*"If any page gets more than 10 negative reports, we will fix it"*

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Is this a realistic decision for your content?

"If any page gets more than 10 negative reports, we will fix it"

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A survey is a quantitative method

	Why? qualitative	How many? quantitative
Observe	Usability Test Field Study	Analytics A/B tests
Ask	Interview	Survey

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If you don't need a number yet, switch methods

	Why? qualitative	How many? quantitative
Observe	Usability Test Field Study	Analytics A/B tests
Ask	Interview	Survey

Caroline Jarrett @cjforms (CC) BY SA-4.0
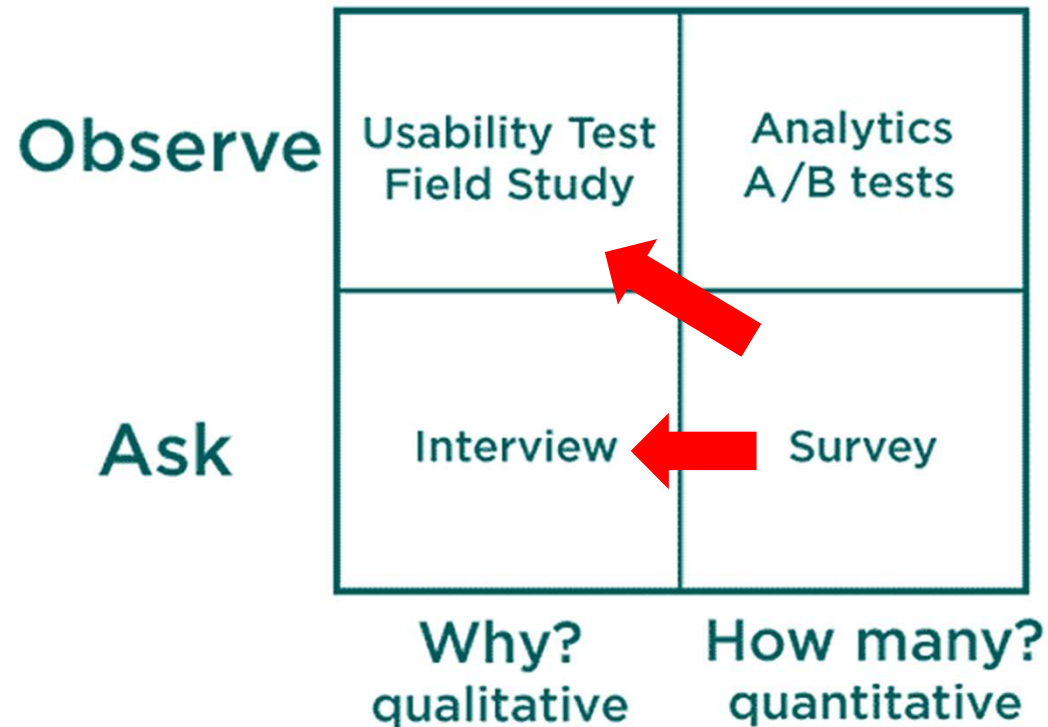
Jack Garfinkel has some ideas for you

Jack works on 'advice content', pages that explain how to do things.

Is your advice content working? - Content Design London

Caroline Jarrett @cjforms

Is your advice content working?

Jack Garfinkel, 29 January 2024, Usability testing, Content design, Tools for user research

Good advice content helps people to do, get or know something. But how can we show our advice content has actually done that? Using metrics and analytics can show when advice content is working and when it might need some help.

Advice content should be 'actionable'. This means that it helps you to do something, usually:

- find out if something applies to you,

Ginny Redish and I have some more ideas for you

Ginny started testing content back in the 1980s and is the author of "Letting Go of the Words: Writing Web Content that Works"

I was honoured that she wrote this post with me.

How to test the usability of documents - Effortmark

How to test the usability of documents

👤 Caroline Jarrett   📅 4 May 2020

Does usability testing work for documents? The answer from me and Ginny Redish is a resounding yes.

In this article, we'll give you three techniques for having people try out documents or any other stand-alone content. These techniques apply whether your document is on paper or online — for example, as a web page or a PDF. They apply for both in-person and remote usability testing — especially with moderated remote testing.

Pile of papers...

Etienne Minh-Duy

Takeaway

If you don't yet need a number to help you to make your decision, choose a different method to do first

You get a good survey by doing many things well

Goals	Sample	Questions	Questionnaire	Fieldwork	Responses	Reports
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Questions you need answers to	The right people in the sample	Questions people can answer	Questions people can interact with	Answers from the right people	Accurate Answers	Useful Decisions

Let's have a think about questions

Questions	Questionnaire	Fieldwork	Responses	Reports
Test the questions	Build the questionnaire	Run the survey from invitation to follow-up	Clean and analyse the data	Present the results
↓	↓	↓	↓	↓
Questions people can answer	Questions people can interact with	Answers from the right people	Accurate Answers	Useful Decisions
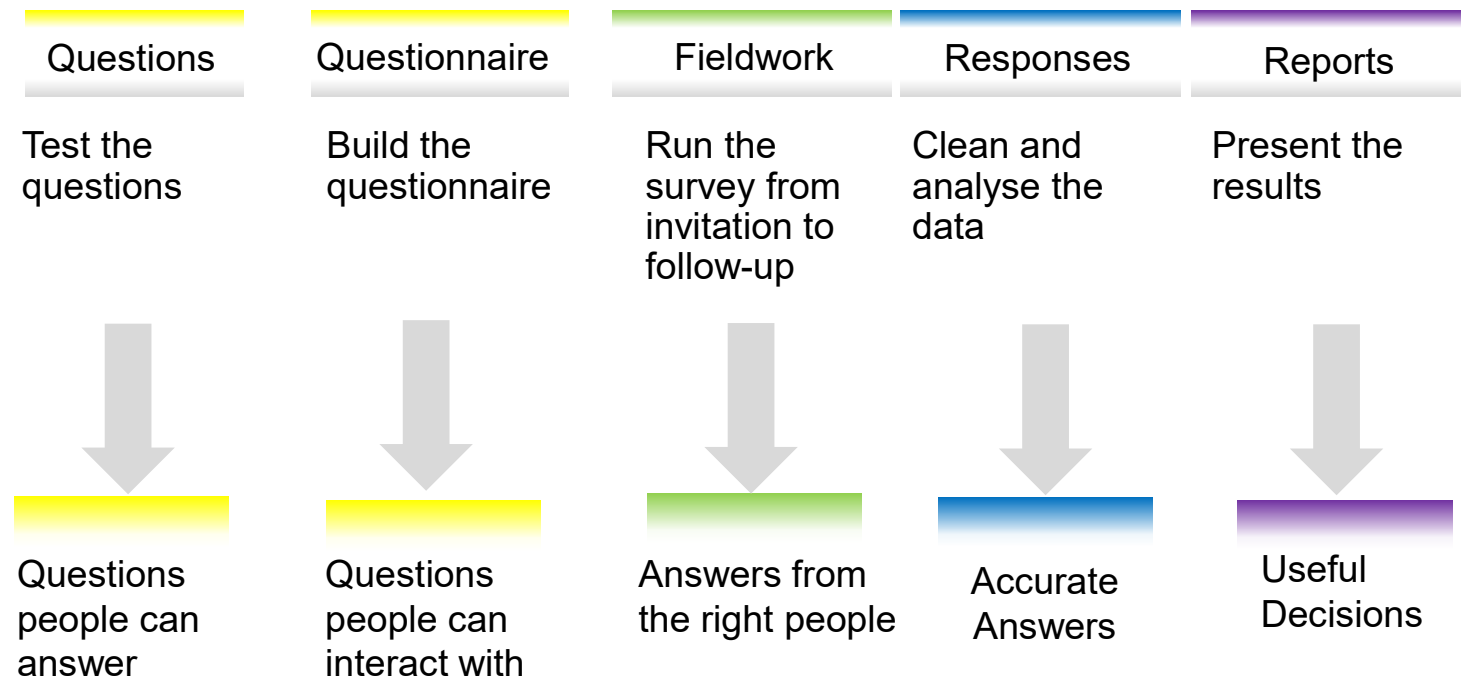
GOV.UK asks this question on every page

Is this page useful? Yes No

Caroline Jarrett @cjforms (CC) BY SA-4.0

I'm constantly saying "No yes/no"
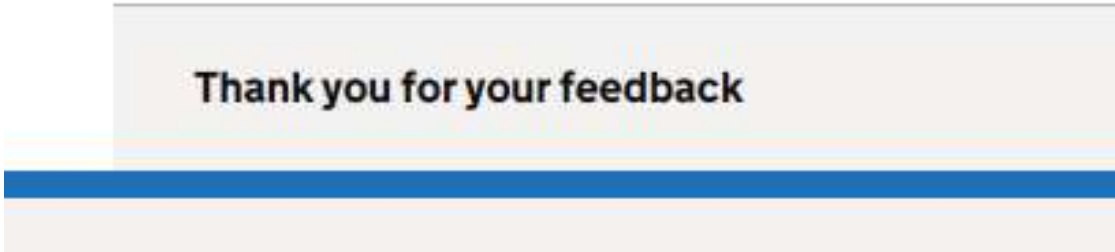
- The real world is analogue
- There are nearly always other answers
- Try spelling out what "yes" and "no" mean

No yes/no questions - Effortmark
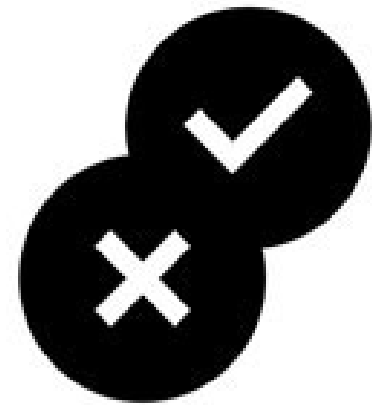
Created by HideMaru
from Noun Project

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I clicked 'Yes' and got a reply

Thank you for your feedback

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I tried again with 'No' and got an invitation

Help us improve GOV.UK

To help us improve GOV.UK, we'd like to know more about your visit today. We'll send you a link to a feedback form. It will take only 2 minutes to fill in. Don't worry we won't send you spam or share your email address with anyone.

Email address

Send me the survey   Cancel   Don't have an email address?

Then I got an email with a looooong link in it

GOV.UK

Thank you for signing up to take our survey. Your feedback will help us to improve GOV.UK

Please click on the link below to take our survey – it shouldn't take you longer than 3 minutes:
https://www.smartsurvey.co.uk/s/0087N?c=%2Fgovernment%2Fcollections%2Fcommodity-prices&gcl=1363824090.1700476669

If you want to report a specific problem, please get in touch with us here:
https://www.gov.uk/contact/govuk

GOV.UK survey

It's quite an easy 6-question survey

GOV.UK

| Cabinet Office

Thank you for agreeing to take part in this survey. All questions are optional. Responses to the survey are anonymous.

1. Are you using GOV.UK for professional or personal reasons?

(●) Professional

(○) Personal

[Next Page]

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It seems that we can't get away from satisfaction

5. Overall, how did you feel about your visit to GOV.UK today?

Not at all satisfied	Dissatisfied	Neither satisfied nor dissatisfied	Satisfied	Very satisfied
○	○	○	○	○

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Let's think about rating scales

Some statement about something here

Most negative	A bit negative	Neutral	A bit positive	Most positive
○	○	○	○	○

A Likert scale has several Likert items

Likert item →

Likert scale →

Statement →

← **Response points**

System Usability Scale

© Digital Equipment Corporation, 1986.

	Strongly disagree				Strongly agree

1. I think that I would like to use this system frequently
   — 1 2 3 4 5

2. I found the system unnecessarily complex
   — 1 2 3 4 5

3. I thought the system was easy to use
   — 1 2 3 4 5

4. I think that I would need the support of a technical person to be able to use this system
   — 1 2 3 4 5

5. I found the various functions in this system were well integrated
   — 1 2 3 4 5

6. I thought there was too much inconsistency in this system
   — 1 2 3 4 5

7. I would imagine that most people would learn to use this system very quickly
   — 1 2 3 4 5

8. I found the system very cumbersome to use
   — 1 2 3 4 5

9. I felt very confident using the system
   — 1 2 3 4 5

10. I needed to learn a lot of things before I could get going with this system
    — 1 2 3 4 5

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Likert had three formats in his scales

1. Do you favor the early entrance of the United States into the League of Nations?

YES	?	NO
(4)	(3)	(2)

13. How much military training should we have?
    (a) We need universal compulsory military training. (1)
    (b) We need Citizens Military Training Camps and Reserve Officers Training Corps, but not universal military training. (2)
    (c) We need some facilities for training reserve officers but not as much as at present. (3)
    (d) We need only such military training as is required to maintain our regular army. (4)
    (e) All military training should be abolished. (5)

17. The United States, whether a member or not, should co-operate fully in the humanitarian and economic programs of the League of Nations.

Strongly Approve	Approve	Undecided	Disapprove	Strongly Disapprove
(5)	(4)	(3)	(2)	(1)

Caroline Jarrett @cjforms (CC) BY SA-4.0   Likert, R. (1932). "A Technique for the Measurement of Attitudes." Archives of Psychology **140**: 55.

You can find an academic paper to support almost any number of response points

Krosnick and Presser refer to about 87 papers on response points

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Krosnick, J. A. and S. Presser (2009). Question and Questionnaire Design. Handbook of Survey Research (2nd Edition) J. D. Wright and P. V. Marsden, Elsevier. Emerald_HSR-V017_9 263..313 (stanford.edu)

I have a flowchart to help you to decide

Does a key stakeholder* have a strong opinion?

Yes → Go with the stakeholder's opinion

No ↓ Offer five points with a neutral centre point
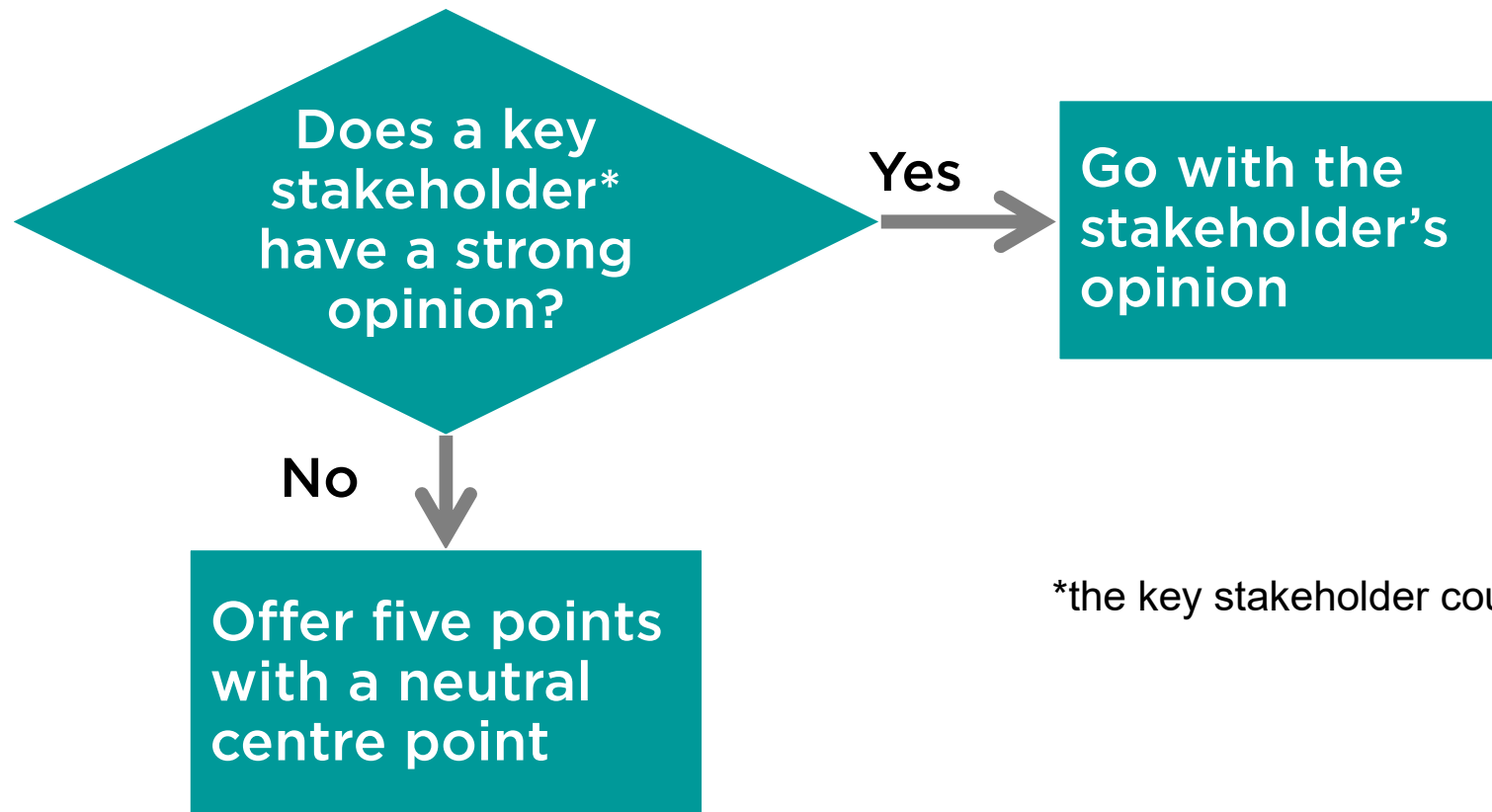
*the key stakeholder could be you

The right number of response points does not help much

Thanks to Bill Selman for this example

[Bill Selman (@wselman.bsky.social) — Bluesky](#)

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max

To what extent do you agree or disagree that Max...?

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
Has a lot of content overall	○	○	○	○	○
Has programs that everyone talks about	○	○	○	○	○
Has a lot of movies	○	○	○	○	○
Has the best movies	○	○	○	○	○
Offers a great mix of content from multiple networks/brands	○	○	○	○	○
Offers a large variety of programming	○	○	○	○	○
Has a lot of children's programming	○	○	○	○	○
Has live sports that I enjoy (e.g., live basketball games, soccer, baseball, etc.)	○	○	○	○	○
Has content from the best writers, directors, and producers	○	○	○	○	○
Has programming that is culturally relevant to me	○	○	○	○	○
Has unscripted series I want to watch	○	○	○	○	○
Has live news that keeps me well-informed	○	○	○	○	○
Has a large selection of recent popular movies I want to watch	○	○	○	○	○
Has some of the best original programming available	○	○	○	○	○
Has content from the most well-known entertainment brands & characters	○	○	○	○	○
Has its own original programming that I can't watch on any other streaming platform	○	○	○	○	○
Has TV shows from other TV networks that I can't watch on any other streaming platform	○	○	○	○	○
Has movies I can't watch on any other streaming platform	○	○	○	○	○
Is a good value	○	○	○	○	○
Has a large selection of older TV series/seasons that I want to watch	○	○	○	○	○

Likert told us to avoid double-barrelled statements

2. The second criterion is the necessity of stating each proposition in *clear, concise, straight-forward statements*. Each statement should be in the simplest possible vocabulary. No statement should involve double negatives or other wording which will make it involved and confusing. Double-barreled statements are most confusing and should always be broken in two. Often an individual wishes to react favorably to one part and unfavorably to the other and when the parts are together he is at a loss to know how to react. Thus in the fol-

Likert, R. (1932). "A Technique for the Measurement of Attitudes." Archives of Psychology **140**: 55.

I've seen some many-barrelled questions

How easy or difficult was it to do what you wanted to do?

IMPORTANT: Please read the options carefully first before you select your response.

	Extremely easy	Quite easy	Neither difficult nor easy	Quite difficult	Extremely difficult
Thinking about when you set-up, amended or cancelled a payment (direct debit or standing order)	5	4	3	2	1
Thinking about when you viewed or downloaded your current account balance or statement	5	4	3	2	1
Thinking about when you made a payment or transferred money in or out of your current account	5	4	3	2	1

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Takeaway

Good questions keep to one topic at a time
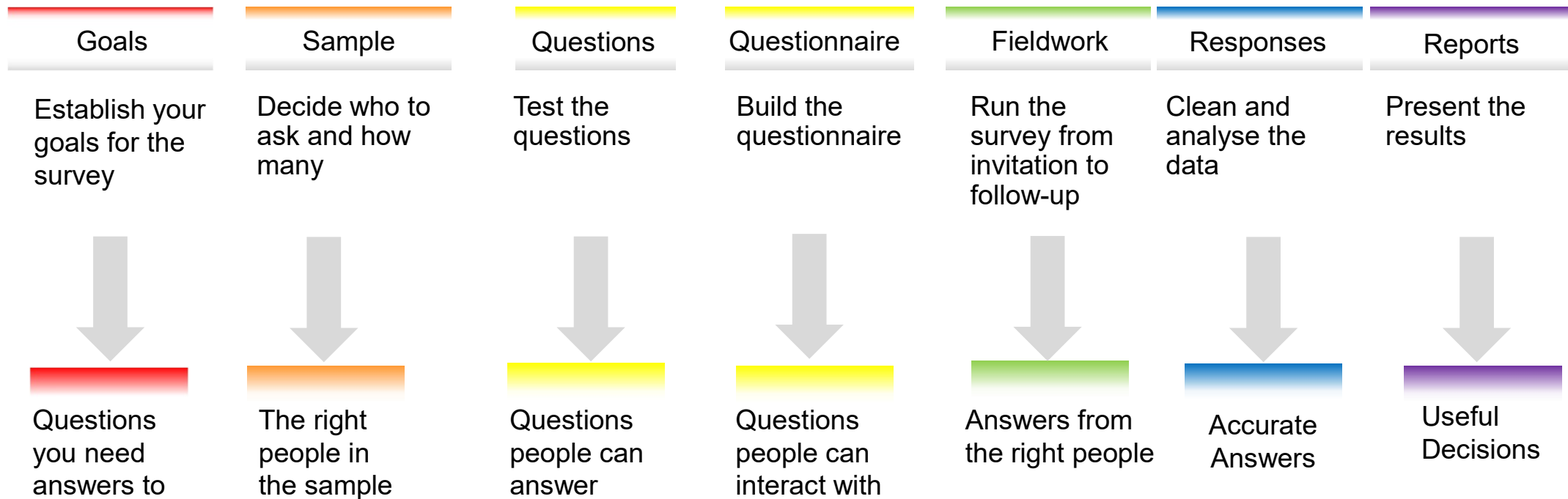
Caroline Jarrett @cjforms

Likert also wants clear, concise, and straight-forward

2. The second criterion is the necessity of stating each proposition in *clear, concise, straight-forward statements*. Each statement should be in the simplest possible vocabulary. No statement should involve double negatives or other wording which will make it involved and confusing. Double-barreled statements are most confusing and should always be broken in two. Often an individual wishes to react favorably to one part and unfavorably to the other and when the parts are together he is at a loss to know how to react. Thus in the fol-

Likert, R. (1932). "A Technique for the Measurement of Attitudes." Archives of Psychology **140**: 55.

Takeaway

To find out whether a question is a clear, concise, and straight-forward, test it with people who will answer it

You get a good survey by doing many things well

Goals	Sample	Questions	Questionnaire	Fieldwork	Responses	Reports
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↓	↓	↓	↓	↓	↓	↓
Questions you need answers to	The right people in the sample	Questions people can answer	Questions people can interact with	Answers from the right people	Accurate Answers	Useful Decisions

Let's think about who we ask and who answers

Sample

Decide who to ask and how many

⬇

The right people in the sample

Fieldwork

Run the survey from invitation to follow-up

⬇

Answers from the right people

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On the web, anyone can answer

Is the person who answers part of your actual target audience?

http://www.bbc.com/news/10506482

It is highly unlikely Bieber would be given permission to enter North Korea

By Daniel Emery
Technology reporter, BBC News

Canadian singer Justin Bieber's has become the target of a viral campaign to send him to North Korea.

A website polled users as to which country he should tour next.

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A representative response beats a big response

Concept	Definition	Example
Response	Number of answers	5,000
Response rate	Response divided by the number of invitations	10%
Representativeness	Whether respondents you get are typical of the users you want	

Caroline Jarrett @cjforms (CC) BY SA-4.0   Image credit: North Korean flag, http://commons.wikimedia.org/wiki/File:Flag_of_North_Korea.svg

This is a representativeness question

GOV.UK

Cabinet Office

Thank you for agreeing to take part in this survey. All questions are optional. Responses to the survey are anonymous.

1. Are you using GOV.UK for professional or personal reasons?

(●) Professional

( ) Personal

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Takeaway

Aim to include a question about representativeness in every survey

(but not too many questions)

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Interviewers used to visit every respondent

Image credit: http://www.census.gov/history/www/genealogy/decennial_census_records/

The 1950s mindset was "Ask Everything"

Survey =
Big Honkin' Survey

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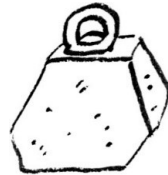
The internet means we can do Light Touch surveys

- You're allowed two questions
    1. A question that will help you to make a decision
    2. A question that tells you about representativeness
- Get the survey to a very small sample of people (10?)
- See if you can make the decision
- Improve, iterate, increase
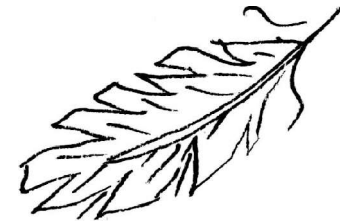
This one-box questionnaire asks an open question

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You can iterate towards a light touch survey

5 people

20 people

100 people

Time for new question

Caroline Jarrett @cjforms (CC) BY SA-4.0
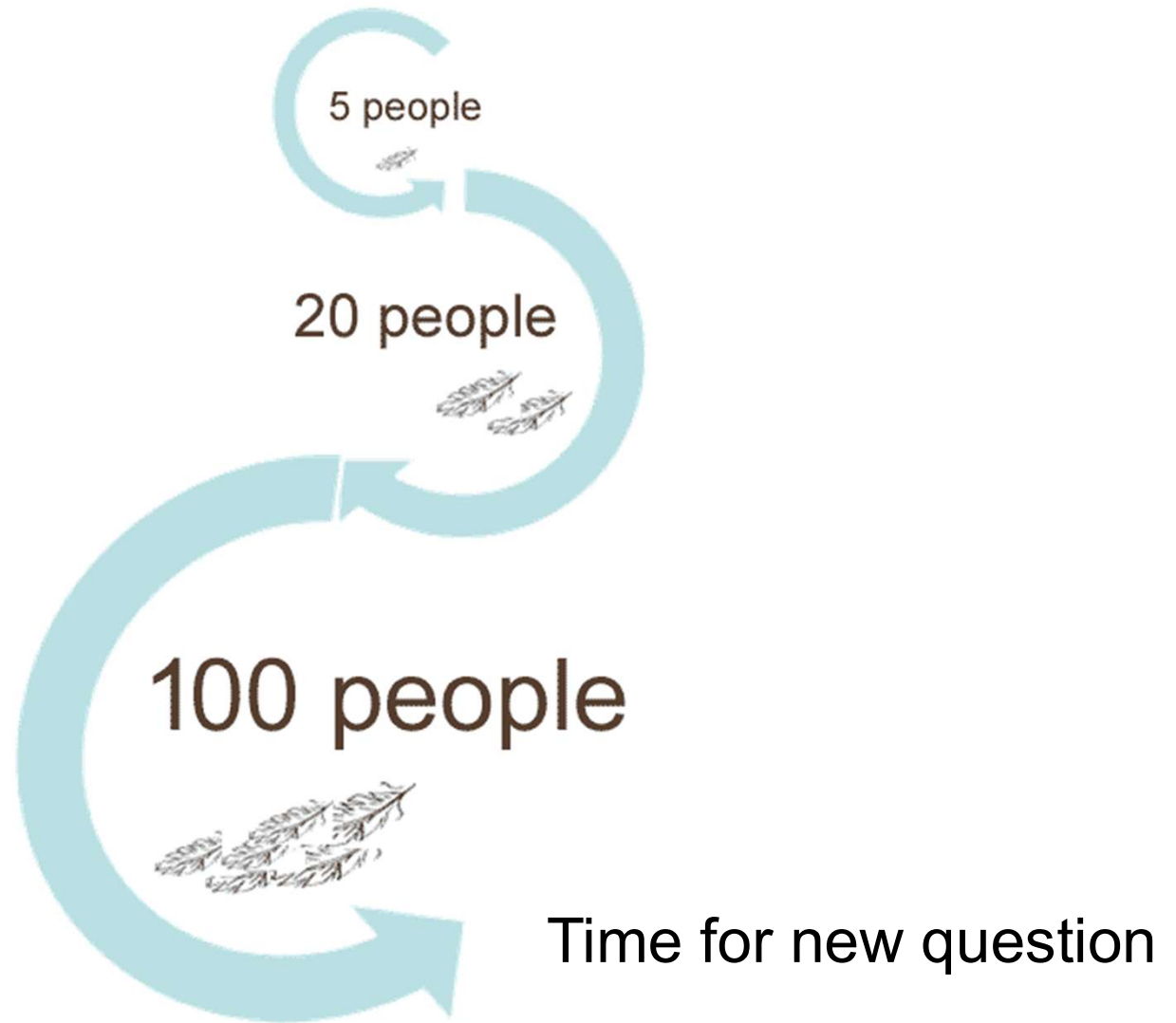
Consider 'patchworking'

Traditional survey method

- Decide on one questionnaire
- Include all the questions
- Stick with it

Benefits:

- Lots of data
- Easy to compare

Problems:

- High burden
- Inflexible

Patchworking method

- Do constant tiny questionnaires
- Ask minimal representativeness questions
- Change everything else all the time

Benefits:

- Lots of data
- Low burden
- Flexible

Problems:

- More difficult to compare

Caroline Jarrett @cjforms   (CC) BY SA-4.0   Get more insight from smaller surveys by patchworking - Effortmark
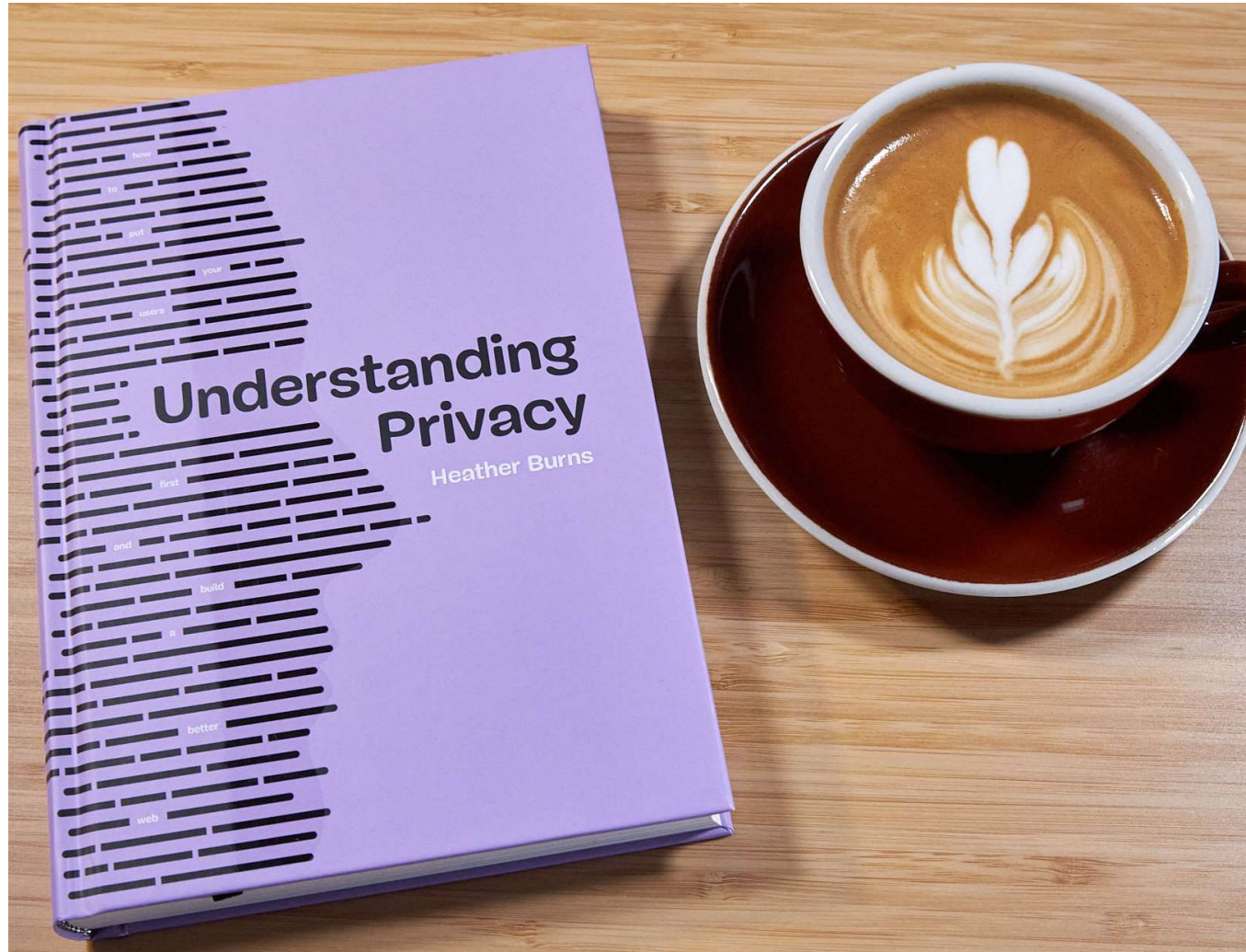
Tiny surveys mean less time on privacy

If you only have one representativeness question, then doing your due diligence on privacy is going to be a lot quicker
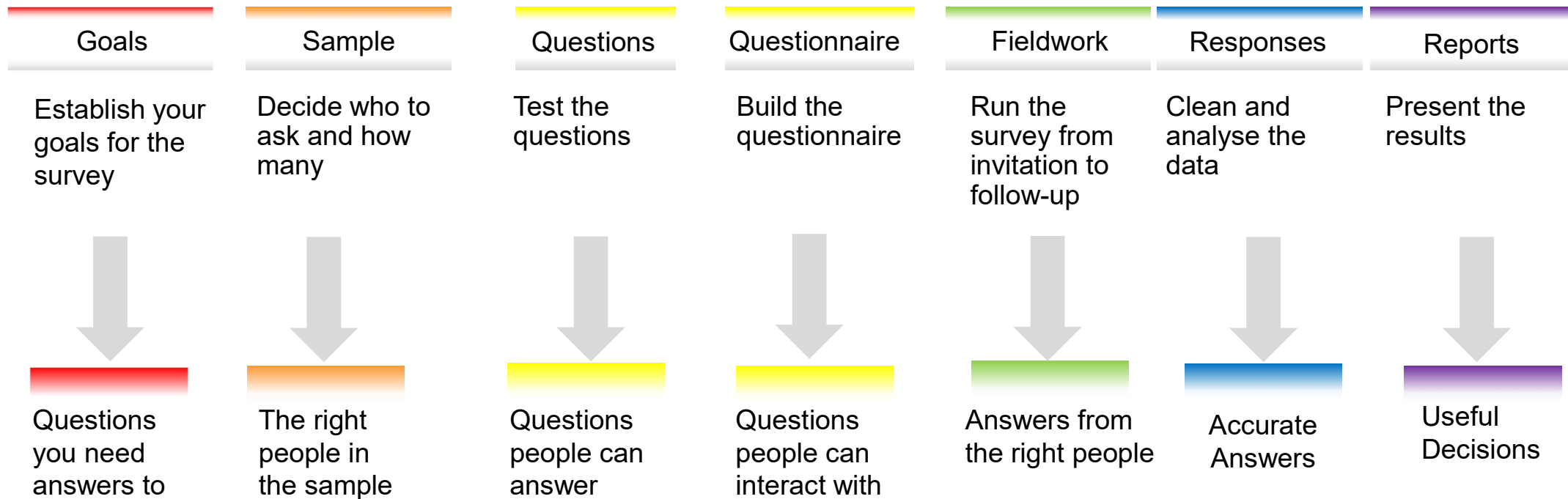
Full demographics that can pinpoint an exact person -> lots of privacy concerns
One very general question -> no privacy worries

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Privacy is important

Read
"Understanding Privacy"
by Heather Burns

Do what she says

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https://www.smashingmagazine.com/printed-books/understanding-privacy/

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Ask me questions: Caroline Jarrett

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caroline.jarrett@effortmark.co.uk

www.effortmark.co.uk