

DEMOGRAPHIC AND SCREENING QUESTIONS

Survey Design Best Practices **AND** *Screening Question Template*



COMMUNICATIONS FOR RESEARCH



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If you have done qualitative or quantitative research for any period of time, you know how much time and effort goes into developing the just the right question to get the information you are seeking. It takes work to ensure that you are avoiding biasing your results through your phrasing or that your questions are able to truly get at deep motivations. All of that requires a great deal of thought.

But, how much thought are you putting into your

RESPONDENT SCREENING?

Demographics are the easy part of research, but in some ways that makes the screening process the most susceptible to sloppiness. A failure or oversight in the recruitment and screening process can quickly compromise your data quality, cost your client money, and you your reputation.



There are lots of different factors to consider when creating your questionnaire for qualitative recruitment. What medium will you be using for the survey; would a telephone or online questionnaire better suit your needs? Depending on which one you choose you will need to design a very different questionnaire. Did you get all the information you will need in case the qualification criteria change halfway through the study? Response options need to be carefully considered as well to avoid overwhelming your respondent.

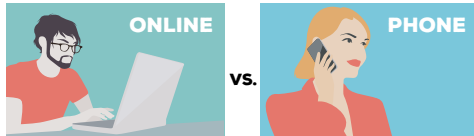
At **Communications for Research**,

OUR BUSINESS IS RESPONDENT RECRUITMENT

and over the years we have learned a thing or two about how to do it right. We have summarized those lessons in this ebook and provided a template script that you can use to get started recruiting respondents for your next project.

Survey Design Best Practices

FOR DEMOGRAPHIC AND SCREENING SURVEYS

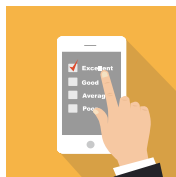


1. DON'T USE THE SAME SURVEY ONLINE AND ON THE PHONE

Respondents process online and telephone surveys differently. The key for online surveys is to make the question clear even for readers who skim. You can do this by ensuring each question stands alone and by **bolding** or underlining crucial phrases. Telephone surveys are all about maintaining a natural flow as the interviewer reads the questions. Eliminate redundant phrases or complex sentence construction to keep the script sounding natural.

2. USE SIMPLE LANGUAGE

Your respondents are not stupid, but they also probably are not professional market researcher nor are they necessary well-versed in your client's industry. Avoid jargon and keep things in plain language. Remember, the object of designing questions is not to confuse or trick people; you are looking to get accurate information. Poorly phrased or confusing questions result in drop-offs or, worse, bad data.



3. LIMIT YOUR ANSWER CATEGORIES

In the vein of keeping things simple, don't overwhelm your respondent with too many possible answer choices. There may be situations where a long list is necessary, but studies suggest that 6 or fewer options is ideal for keeping people motivated and engaged. If you want accurate sampling, make it easy for your respondents.

4. KEEP THE QUESTIONS BRIEF

In general, people have short attention spans. If you ask people to read and respond to long, complex questions, they become more fatigued and are more likely to satisfice or cheat.

5. SAVE MORE PERSONAL QUESTIONS FOR THE END WHEN POSSIBLE

If you start your questionnaire with difficult or personal questions, people are less likely to answer. Once they have completed some of the survey, they are more likely to complete the entire survey.





6. DO NOT USE OPEN-ENDED QUESTIONS, EXCEPT IN RARE CASES

Open-ended questions can provide some fascinating answers, but generally are not appropriate during screening since they greatly

complicate statistical analysis. The only situations where you should use an open-ended question during screening are either to obtain a discrete numerical value or assess a respondent's unaided awareness of a topic. These are rare cases, however, so you should usually stick to close-ended questions.

7. MAKE SURE CLOSE-ENDED ANSWERS DON'T OVERLAP OR UNDERLAP

This is a simple mistake to make, but critical to avoid for the sake of your data quality.

Ensure that the discrete numbers in your answer options do not overlap or underlap.

For example, the choices online could be:

“\$25,000–\$49,999” and “\$50,000–\$74,999”

and not

“\$25,000–\$50,000” and “\$50,000–\$75,000” (overlap)

or

“\$25,000–\$49,000” and “\$50,000–\$74,000” (underlap)



8. ENSURE PEOPLE ANSWERING “OTHER” REALLY ARE “OTHER”

A response of “Other” should usually disqualify a respondent from participation because you cannot be sure if they fit your target profile. Your responsibility then is to review your question to ensure your answer choices are not unintentionally causing qualified respondents to select “Other.”

9. ALLOW RESPONDENTS TO REFUSE TO ANSWER QUESTIONS

Respondents do not make an affirmative choice to refuse to answer a question; they simply do not choose to answer. This may seem like a semantic difference but has implications for your online and phone survey design. Just as “refuse to answer” is never read to the respondent as an answer choice in a phone interview, you should never require an answer to proceed to the next question in an online survey.



*Questionnaire design may not be rocket science,
but you must do it well if you hope to get reliable answers.
You or your clients depend on knowing how people think;*

ASKING THE RIGHT QUESTIONS

is the only way to gain this knowledge.

Screening Question Template

Hello, my name is [INTERVIEWER].

I am calling on behalf of [MARKET RESEARCH COMPANY].

We are conducting a study about [TOPIC].

We are not selling anything; we are only looking for your opinions.

My questions will take about [X] minutes.

If you qualify and participate in the research we would pay you [\$XXX]
as a thank you for your time.

(If needed: Again, the survey's purpose is to collect your opinions—we are not selling anything. Your answers will be kept confidential and reported in summary form)

1. What is your age? *(Start to read, ACCEPT first response and move on)*

- 1) 17 or under
- 2) 18 to 24
- 3) 25 to 44
- 4) 45 to 64
- 5) 65 to 74
- 6) 75 or older
- 99) NOT answered

2. In order to make sure all groups are represented in this survey, are you...? *(Can select multiple)*

- 1) White or Caucasian
- 2) African American
- 3) Hispanic or Latino
- 4) Asian or Asian American
- 5) Native American
- 6) Other (*Specify*) _____
- 99) NOT answered

3. Which of the following income categories best describes your total annual household income before taxes? *(Start to read, ACCEPT first response and move on)*

- 1) Less than \$30,000
- 2) \$30,000 to \$50,000
- 3) \$50,001 to \$75,000
- 4) \$75,001 to \$100,000
- 5) \$100,001 to \$150,000
- 6) \$150,001 or more
- 99) NOT answered

4. Which of the following statements best describes your involvement in decision making regarding [TOPIC]? *(Start to read, ACCEPT first response and move on)*

- 1) I am the sole decision maker
- 2) I share decision making with others
- 3) I give input, but someone else usually makes the final decision
- 4) I am not usually involved in decision making
- 99) NOT answered

5. Do you or does any member of your household work for any of the following:

- 1) Industry 1
- 2) CLIENT INDUSTRY *[Terminate]*
- 3) Industry 3
- 4) Industry 4
- 99) NOT answered

6. What is your ZIP code? *(Clarify with: At your primary residence OR at the primary office you work in)*

7. In your household, do you have any children under the age of 18?

- 1) YES
- 2) NO
- 99) NOT answered

8. Gender *[Do not read, indicate gender of respondent by voice]*

- 1) Male
- 2) Female



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