

# Introduction to UX Research

## Lesson 8: Survey Design


# Consumer Insights

- Customer experience as a whole
- Examples
  - Evaluating customer experience (VoC, emotions, brand perception, satisfaction)
  - Evaluating customer behaviors (expectations, aversions, drivers)
  - Understanding loyalty behaviors (likelihood to keep using the product, recommendations to others)
  - Understanding physical products (comparing products in retail and hospitality space)



# Survey Design

## Surveys can be used to measure:

- Brand / company awareness (market research)
  - Comparison with competitors (market research)
  - Interest in new product directions (market research)
  - Product usage (UX)
  - Product feasibility (UX)
  - Attitudes about the product (consumer insights)
  - Loyalty behaviors (consumer insights)
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# Survey Design

## Surveys should ideally be:

- Short
- Easy to understand
- Free from jargon
- Motivating (not boring)



# Survey Design

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- Easy to understand
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*Participants are people, and most likely are people who have not thought about your study nearly as much as you have. Most often, they don't want complicated terms or nuanced instructions and you don't need that kind of information from them.*



# Step 1. Define area of inquiry

How engaged are people when using my app?

Success?

Completion?

Positive referrals?

More money in purchases?

Making a single purchase?

All these definitions of **engagement** require different methodological designs and different data analyses

# Step 1. Define area of inquiry

## Does prior theory inform your work?

- May want to use constructs as defined by previous scholars
- Can look at psychometric validity and generalizability of different operationalizations and measurement scales
- More likely to use inferential statistical methods

# Step 1. Define area of inquiry

## Do you know what you expect at all?

Sometimes, it's not possible. If it's March 2020 and you're studying the ***effect of the coronavirus pandemic on retail shopping***, you might not have directional hypotheses because there hasn't been a worldwide pandemic that has coincided with high usages of personal technology during a U.S. election year before now.



# Step 1. Define area of inquiry

## **Conduct focus groups or interviews before designing your survey**

- Helps you learn if you're asking the wrong questions
- Can help you clarify the best question wording

## Step 2. Form your hypothesis

### **Theory**

Product A isn't as easy to understand as Products B and C.

### **Why do you think that?**

Product A sales are  $\frac{1}{2}$  the size of Product B sales and  $\frac{1}{3}$  the size of Product C sales.

## Step 2. Form your hypothesis

- Try to identify possible causes/reasons for the problem
- Focus on problems that you can solve
- The solution should be related to whatever KPI your company identifies

## Step 2. Form your hypothesis

Think about main effects and control variables *a priori* and test those as directly as possible.

You will not be able to control for everything or answer everything with one study / hypothesis. That's okay.

## Step 3. Design your survey

- **Introduction**  
Briefly explain study goals, what the results will be used for, and expected duration
- **Screening questions**  
Ensure the participant meets the criteria (e.g., actually uses your service or product)
- **Main questions**  
Questions addressing the main area of interest.  
Group related questions together under a heading
- **Demographics**  
Age, gender, income  
These should be optional questions
- **Debrief**  
“Is there anything else you think we should know?”

## Step 3. Design your survey

- Multiple Choice – nominal data
- Multi-Select – nominal data
- Likert Scale – ordinal data
- Rankings – ordinal data
- Sliding Scale – continuous data
- Open Ended – text data

# Step 3. Design your survey

## Multiple Choice

*If given a choice, which product would you like to test?*

- Product A
- Product B
- Product C

Clear selection

## Multi-Select

*Which of these products would you like to learn more about? Check all that apply.*

- Product A
- Product B
- Product C

## Rankings

*Rank how likely you are to buy Products A, B, and C*

	Product A	Product B	Product C
First choice	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Second choice	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Third choice	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

# Step 3. Design your survey

Likert Scale

*How easy is it for you to understand Product A?*

1 2 3 4 5

Not at all easy to understand

Extremely easy to understand

Clear selection

Likert Scale

*How easy is it for you to understand Product A?*

1 2 3 4

Not at all easy to understand

Extremely easy to understand

Clear selection



# Step 3. Design your survey

## Sliding Scale

*On a scale of 0-100, how easy is it for you to understand Product A?*

65

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## Open Ended

*How do you feel about Product A?*

I like using Product A, but I wish the instructions were more clear. I've been having a hard time reaching anyone from the company to answer my questions about it. If they'd return my call, I think I would use Product A all the time.

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# Step 3. Design your survey

## Aggregate Rating Scales

*How well do these statements describe you from 0 (not at all) to 4 (extremely)?*

1. I often have tender, concerned feelings for people less fortunate than me
2. Sometimes I don't feel very sorry for other people when they are having problems. (R)
3. When I see someone being taken advantage of, I feel kind of protective towards them
4. Other people's misfortunes do not usually disturb me a great deal (R)
5. When I see someone being treated unfairly, I sometimes don't feel very much pity for them (R)
6. I am often quite touched by things that I see happen
7. I would describe myself as a pretty soft-hearted person

**Empathy score** = sum or average of scores for each question

## Step 3. Design your survey

### Randomization

- Question order matters
  - Recency and primacy effects
  - Open ended before closed questions (in some cases)
- Questions should be grouped by topic
  - Randomize questions within the block
  - Randomize blocks