

User Researcher's Guide to Surveys



Supercharge Design

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Introduction

Hi there! 

We are a team of experienced product designers and managers working on professionally-crafted educational products and resources for product, UX, and UI designers worldwide.

Our main goal is to help product designers of all levels become better at what they do. In turn, the world will become a better-designed place, and we will all reap the benefits!

We created this short but insightful book to share some of the tips and insights on what makes a great UX research survey.

If you're serious about product design and user research – read on. Thank you for joining us on this adventure!

If you have a colleague, friend, or family member that you think would like this book, we'd love it if you could tell them about it. And if you don't already – [follow us on Instagram](#) for numerous free tips per week!

Thank you for reading!



What is a survey

A survey is a research method that consists of a list of questions. This set of questions aims at a particular goal or problem that needs solving.

Surveys are quantitative, meaning answers are **specific, measurable, and comparable**. Produced qualitative results are of lower quality in comparison to user interviews as participants rarely go into detail and you can't ask follow up questions as easily.

Surveys validate minor-scale hypotheses in a short time.

Surveys are usually sent out to users via the product's page or email invitations. Sometimes if it is a new product, and the budget allows it, there might be ads made for the survey. The main idea is to be as unintrusive as possible.

As with all research methods, surveys have some positives and negatives.

The main benefit of using surveys is that they allow for a broad scope of things you can cover with them. They usually **don't require a lot of time** to fill out.

On average, they should take around five minutes of participant's time, and they aren't very intrusive. Gathered data is quantitative and comparable to other participants in the research.

This allows researchers to **automate** parts of the process, anything from collecting to analyzing data, which can help bring down the cost of the process.

Because of that, this method is one of the best solutions **for projects with limited budgets**. Another great advantage of surveys is the length required to conduct them. It can be a single quick survey or a continuous research technique.

As previously mentioned, surveys do come with some shortcomings. The main limitation is getting more profound insights into your participants.

Questions are predefined and straightforward, and there is rarely a lot of room for open-ended answers. Surveys are also time-limited.

Five minutes is not a lot of time for researchers to understand the needs of their subjects.

The lack of fill-out time with a combination of information creep results in a survey that gathers a lot of information. But unfortunately not a lot of useful ones.

Researchers tend to fall for **information creep** only to later realize that many questions don't add enough value to the goal. So keep that in mind!

Surveys also require less incentive for participants to fill them out, making the screening phase easier. But if you need it for continuous research, you will need a larger pool of candidates.

You will burn through candidates faster than expected, especially compared to other methods, e.g., user interviews.

User interviews are more time-consuming but provide researchers with qualitative data. They are great for researching the target audience and the market. With interviews, you gain a better understanding of your target audience.

Don't miss out on freebies and other resources like this one

We believe that we can make the biggest impact in the world by sharing what we know and by allowing others to reach their full potential as product designers. We're hoping this creates a **ripple effect** and helps make products all around the world more useful, more accessible, and more valuable! **Supercharge Design** is an ever-growing platform filled with specific, accessible, motivating, relevant, and tailored product design learning resources.





Survey types

Survey type effectiveness depends on the target audience and the research goal.

The main types would be face-to-face, online, panel sampling, phone, mail, kiosk, paper, SMS, etc. The most common types are face-to-face and online.

Face-to-face is, as it sounds, in-person survey conducting. This type of surveying is usually done if the participant comes to the research facility. It is either to take part in several pieces of research at once or if the participant is someone within the company and is already in the office.

This type is excellent because the researcher can also pick up on emotional cues. The researcher has an opportunity to follow up with a question or two if it requires clarity.

Online is a bit more practical. The online approach allows researchers to gather a vast range of participants from different cultural and geographical backgrounds.

Recruitment tends to be easier for this type of survey since it doesn't need traveling or a lot of time. There are excellent services that help recruit participants if you can afford them.

Tight budgets lead researchers to communities on **social media** which fit the target audience. For example, if you wanted to research kayaking, you could have found a local kayaking Facebook group or a kayaking influencer to share the ad for you.

Be respectful towards groups and ask admins for permission first. Sometimes groups do not allow any form of ads, and you might get banned.



Plan your survey

Goal and hypothesis

First thing before you start designing your survey, you need to define the goal.

For this, you will most likely need to have a meeting with the **stakeholders**. Discuss what the main issue that you are trying to solve is. When does the problem occur? What has the team already tried to fix it, and what was the outcome? Are there any follow-ups

Once you manage to align goals among team members, it is time to **set a hypothesis**. The goal is essential because you will measure your survey results according to it.

Defining target audience

With goals and hypotheses out of the way, it is time to define the target audience.

What platform of communication and devices do they use? Communication style is important because you will need to adjust and design a survey based on this information. Sometimes it will be multi-platform, but you will still focus on one.

For example, if your audience is 35-50-year-olds, their dominant platform would be a desktop computer and Facebook. In that case, you will focus on candidates that come to your website via computer. You will place invites either on Facebook ads or ask group admins to post your ad in their group.

If your audience are teenagers, turn to mobile apps and Instagram influencers.

Sample sizes

Each research has to have a **sample size**.

The sample size is essential for comparison to other research. Also, defining the sample size will help you plan your rounds of research. You need to know how to spread them out for long-term research for a limited number of candidates.

A good sample size for surveys is at least **a couple dozen**, depending on your goal and audience size. The more, the better.

Duration of survey(s)

Take the duration of the survey into account at this stage.

You will want to optimize the duration to have the **best possible fill-out rate** of the survey. There is no point in having a lot of participants opening up the survey to have 80% drop out before the 6th question.

Keep surveys **short**, and focus on the duration it takes to fill them out instead of the number of questions. Sweetspot is usually between 3 and 10 minutes, leaning towards the 5-minute mark.

Suppose you have a specific hypothesis and can bring survey time under three minutes, even better. But, if you require more insight and open-ended questions, you can go over 10 minutes, but don't overdo it.

Longer surveys will also need **better incentives**, but more on that later.

Duration of research

How long will this research last? Is it one time only, or is it recurring? How often will you be conducting surveys? Once every two-three weeks or more?

The more frequent or prolonged it is, the more planning it requires on your side. The budget will also affect the planning duration and the product's userbase.

For long-term research, scatter your recruitment of participants throughout each phase. It is tempting to have 100 participants in the first round. But you might run out of participants by the fifth round. Running out of participants will force you to go back to screening and lose time.

Deadlines

Ah, yes, deadlines. Define deadlines at the very start of the research. Because if you are in a hurry, you won't have enough time to screen for **great candidates**. You won't have time to set up the research, and you will have to cut corners to save time.

Cutting corners only leads to unreliable data and an empty budget. Keep in mind that sending surveys too early is as bad as sending them too late.

Budget

Let's talk about everyone's favorite - budget. The budget will determine how your whole research phase goes.

It can be **liberating or restrictive**. Knowing when and where to spend your resources will make or break the research. With a budget, you need to know exactly how much you have. You don't want to promise **gratuity**, to realize that you ran out of money halfway through.

The range for research budgets can be anywhere from zero dollars to thousands of dollars. Luckily, surveys are on the **cheaper** side.

The gratuity and screening make up the most significant part of the expense. Gratuity doesn't have to be money, but it can also be a free product, discount, or a small voucher.

In some cases, it is possible to offer exclusive access to beta releases of the product. It depends on what your audience appreciates. How much **value** or money should you provide for incentives?

The amount of value comes down to your budget and survey duration. For short surveys, you should be okay with offering special discounts. For longer surveys, you will have to go with money. From experience, anywhere from **\$5-\$35** is fine.

Don't forget to calculate the cost of tools and third-party services into the budget. They cost, too. They might not seem expensive, but with a large enough pool of candidates, you will soon go over your limit.

You might be wondering: "What if I don't have enough time to recruit, interview and analyze data, plus all the other things I need to do for the project?"

There is a solution for this, but it requires a significant budget. It would be best to consider hiring an external agency for cases like this one. An agency that specializes in conducting survey interviews.

Most often, those agencies cover the screening and recruitment stage. It is a **one-stop solution**. External agencies can also be an excellent source of more profound insights into this topic. They have a ton of experience.

Should I skip a survey?

Yes, you have read that right!

Skipping surveys is also an option you shouldn't disregard because you can afford one. Depending on the project, you already might have available data for your research. This research might not answer all questions you need. But if it covers 70-80% of it, consider skipping this form of research.

Another handy alternative could be your **company's research archives**.

It is possible your company already did similar research. Maybe it was for solving another problem, but the data could also apply to your situation. Plus, the person who did the study could still work for the company you're in. You could talk to them for more insights if they have any.

Your **team members** are also a good research source for insights that won't cost your budget a cent.

Sales teams and customer support teams communicate with your target audience daily. They can give you insights and steer you in the right direction. Combine these findings with other data.

For example, competitors' reviews and you have enough data to skip survey research.

A note to keep in mind

Teams' insights and competitors' reviews can skew this type of analysis since both sources have a subjective point of view.

Recruiting and incentives

Now that you have designed your survey, it is time to **recruit participants**. A budget will play an essential role in how far and wide you can go.

If your budget is large enough, you can use recruitment services. But if you are on a limited budget or no budget, you will need to rely on ads and some hacking recruitment methods.

A simple approach to **low-budget screenings** would be running a marketing promotion. See what platform and type of reach-out your target audience prefers. Otherwise, you will have to rely on manual research and direct messaging.

Sometimes there might be specialized groups for your product, e.g. fishing groups. You can join them and post the ads there. But before you do that, ask the group's administrator for permission. If your ad is in line with rules or administrators find the ad appropriate, they might be willing to run the ad for you.

Having a **fair and reasonable incentive** for participants will help you out.

Of course, one place to find participants might not be enough for your research. Make sure you have many different sources for gathering participants. Otherwise, you might run out of participants and go to square one - recruitment.

If you find yourself on no-budget research, you can use your networking channels.

Start with your co-workers within the company. You want to avoid people on this project and focus on other team members, e.g., accounting. If you are a larger company or a corporation, you can use new hires. Reach out to the HR department and ask them to let you know whenever a new person starts their onboarding, and as long as they fit into your target audience – you have a new recruit.

If you work in a co-working space, you can ask people from other companies to have them surveyed. But be careful of a non-disclosure agreement. Also, check with their superiors if that is fine with them.

And best for last, if you are on no budget and under strict NDA, go to your **sales and customer support teams**. They communicate with your customers and target audience all the time. They can connect you with potential candidates and provide you with valuable insights.

You can also integrate survey invitations to the **product's website**, and it won't cost you anything! The success of recruitment will depend on incentives and your product's community.

The incentive will be determined by budget, but the type of incentive depends on the participants' interests. The usual incentives are gift cards, as they are the most valuable.

On the other hand, if you do not have a considerable budget, you can offer a free product or discount code for the product. Early access is also a great incentive, but it depends on how trending the product is.

Early access could be a good offer if your product has an active community.

The active community will also be eager to give you feedback on your product. If you do decide to go for community users, make sure to mention it in your presentation to stakeholders. Don't forget to clarify that participants will get gratuity **regardless** of their answers.

Finally, if the budget is limited and you can't give incentive to everyone, participants can be entered into a pool, and only a select few random ones might be given gratuity.

Disclaimers

As you will be handling **participants' data**, you will need to disclaim how you plan on using it. You should explain that in the beginning.

The rule of thumb is the more personal questions are, the more detailed disclaimer needs to be. Disclose anything, from keeping the data to presenting the it and ensuring participants' anonymity. **Anonymity can be crucial** as you might have infringing information, e.g., "Were you sued in the last two years?"

You will also need to disclaim that participants won't be evaluated. And there are no right and wrong answers. These disclaimers will help participants relax, and you will get more genuine answers.

In some cases, researchers might share the data or findings publicly. If so, inform participants when the research data and results are published.



Create your survey

Designing a survey can seem trivial and easy, but that is not the case. There are a lot of **small details** you need to pay attention to if you want to **get reliable data**.

In this chapter, we will cover the essential things for a successful survey design.

The most common mistake many researchers make is asking too many questions.

Too many questions exhaust the participant and prolong the duration of the survey. The longer the survey lasts, the less likely your participants will complete it.

Researchers tend to focus on the number of questions instead of the time it takes to complete a survey. The best duration for the survey is up to 10 minutes long. **The shorter, the better.**

Beginner researchers often get caught up and create a massive list of data they want to extract. They usually think it is good to have all participants' information. It's not.

Some of the questions that don't seem essential can cause participants to quit the survey. That happens because the participant could lose interest or questions are too intrusive. For example, you don't need to know their address if the survey is about a digital product.

Another option researchers forget to include is **skipping a question**. Often some questions won't apply to the participant, or they won't know the answer.

Example

Question 1: "Do you have any siblings?"

Answer 1: "No."

Question 2: "How many of them are older than you?"

It would be best to create logic behind what answers are shown based on participant's previous answer. That way, we reduce the cognitive load on participants and we lower the level of confusion.

While creating a survey, you also need to pay detailed attention to **neutrality**.

Using positive or negative questions can affect how participants answer them. For example, "What bad part of the app would you change?"

With this question, the participant will focus only on the negative aspects. Participants should focus on both - positives and negatives.

Use neutral questions to **avoid bias**.

Relevance and length of answers can also influence participants' choices. If you have a list of possible solutions where answers go positive to negative, the participants might **skim through** and think all responses are positive and vice versa.

Thus participants might choose a positive answer. Participants could skip the middle part if options go from longer to shorter answers.

The best solution for both of these problems is to randomize the order of answers. By randomizing the order of answers, you can **disrupt skimming**. You can randomize the order of questions themselves, too.

Try to group questions into segments. And make sure the most crucial set of questions comes at the beginning of the survey. Asking for priority information first will help you gather essential data if participants leave the survey mid-way.

It isn't enough to neutralize questions and answers from positive and negative ones. Neutralize brand recognition as well. There could be a brand a participant had come in touch with before.

That experience could be negative or positive. The participant will answer the question based on their experience with the brand instead of the question itself.

One more way to **reduce cognitive load** is to use imagery, video, and animations. That way, your participants will not feel exhausted after the survey. They will complete it faster as well.

As a note, within the survey, try to keep the same **style of visuals assets** to create consistency. If you can, use animations and videos to increase participants' engagement. But pay attention to video size, as they can prolong the loading time of the survey itself.

Vocabulary and clear communication also play a significant role in survey design. You need to pay attention to what words you use.

Not all participants will be native speakers. Using advanced vocabulary could confuse them. The general idea is to keep wording at the **9th-grade level**, i.e. 14-year-old students.

Avoid using jargon and double negatives, too. To make sure your communication is clear, run a quick test by giving some of your colleagues the survey. Colleagues' feedback will help you **notice flaws** – for example, misinterpretation, cultural differences, communication gaps between generations, etc.

If you have participants' basic information, try **personalizing** the survey. Create a welcome and thank you message where you refer to them. It seems small, but it goes a long way.

Give visual cues to survey participants on which step they are and how many of them are left. Visual cues can be simple lines or dots we are all used to seeing at this point. For participants, it takes out the guesswork. They will know precisely how much more it will take to finish, thus **motivating** participants.

One of the best features of survey research is automation. If you set up the survey right, you will be able to **streamline your whole process** from screening to getting analyzed data. For example, you can use chatbots and have automated recruitment conversations. The same you can do for thank you notes.

Tools like Airtable can help you automate **connecting and analyzing** the data.

	Survey Response	Name	Date	Email	PorchCam Experience	Usage (# Weeks)	Favorite Features	Least Favorite Features	Other se
1	Katrina Peterson--11-21-2016	Katrina Peterson	11-21-2016	Katrina Peterson	4. Somewhat satisfied	16	Alerts Live video Recording	Programmability Battery Mobile app	I current
2	Marc Jenkins--11-21-2016	Marc Jenkins	11-21-2016	Marc Jenkins	5. Very satisfied	13	Live video Mobile App	Battery	N/A
3	Kendrick Anar--11-21-2016	Kendrick Anar	11-21-2016	Kendrick Anar	4. Somewhat satisfied	20	Facial recognition Programmability	Alerts Recording	
4	Emily Rintaro--11-21-2016	Emily Rintaro	11-21-2016	Emily Rintaro	3. Neutral	9	Programmability	Mobile App	Security
5	Melissa Gonzalez--11-21-2016	Melissa Gonzalez	11-21-2016	Melissa Gonzalez	3. Neutral	12	Alerts Recording	Mobile App	Home se
6	Belinda Chen--11-21-2016	Belinda Chen	11-21-2016	Belinda Chen	4. Somewhat satisfied	7	Live video Mobile App	Programmability	Gated in
7	Deepa Vartak--11-21-2016	Deepa Vartak	11-21-2016	Deepa Vartak	2. Somewhat dissatisfied	4	Mobile App	Facial recognition Motion detection	
8	Clara Rotelli--11-21-2016	Clara Rotelli	11-21-2016	Clara Rotelli	4. Somewhat satisfied	14	Live video Alerts		
9	Bernard Casper--11-21-2016	Bernard Casper	11-21-2016	Bernard Casper	3. Neutral	10	Motion detection Programmability	Connections & Integrations	Have an
10	Claudia Siv--11-21-2016	Claudia Siv	11-21-2016	Claudia Siv	5. Very satisfied	19	Recording Mobile App Alerts Live video	Live video	
11	Lorraine Ljuba--11-21-2016	Lorraine Ljuba	11-21-2016	Lorraine Ljuba	1. Very dissatisfied	2		Battery Connections & Integrations	Have a fi
12	Gabriella Lily--11-21-2016	Gabriella Lily	11-21-2016	Gabriella Lily	4. Somewhat satisfied	23	Battery Programmability	Night vision	Gated hi
13	Stephan Oswald--11-21-2016	Stephan Oswald	11-21-2016	Stephan Oswald	3. Neutral	11	Facial recognition Mobile App		
14	Edith Lindon--11-21-2016	Edith Lindon	11-21-2016	Edith Lindon	2. Somewhat dissatisfied	3	Recording Live video	Battery	Enterpri
15	Mattheus Anderson--11-21-2016	Mattheus Anderson	11-21-2016	Mattheus Anderson	5. Very satisfied	16	Alerts Recording Live video Connections & Integrations		
16	Reuben Ettore--11-21-2016	Reuben Ettore	11-21-2016	Reuben Ettore	4. Somewhat satisfied	11	Live video Alerts	Recording Connections & Integrations	Use a'
	Marcelle Wiesen--11-21-2016	Marcelle Wiesen	11-21-2016	Marcelle Wiesen	2. Neutral	9	Mobile App	Programmability	

Most common types of questions for surveys

- A **single choice** is excellent for getting comparable data and low cognitive load
 - **Multiple choice** has a higher cognitive load but offers a better range of options and insight for the researcher
 - **Ranking order** is ideal for simplifying more challenging choices, mainly if you include imagery for easier comparison
 - **The rating scale** is functional when answers can range, but it can skew the data if the scale ranges are not of equal impact
 - **Open-ended** is the best when you need to get a deeper insight into the topic. It is often a good practice to keep them optional as they can be time-consuming. The more demanding question, the fewer participants will fill them out

A single choice

- Only one option
 - Can be selected

Multiple choice

- This option can be selected
 - This one too
 - And this one too

I find rating scales

	1	2	3	4	
Awful	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Stellar

Open-ended

Your answer

Mistakes to avoid

Leading questions

A question that sways participants towards a particular answer.

<p>Leading question</p> <p>How awesome is this product?</p>	<p>Fixed</p> <p>How would you rate this product?</p>
<p>Leading question</p> <p>What problems do you have with the developer team?</p>	<p>Fixed</p> <p>How likely are you to recommend working with the developer team?</p>

Loaded (assumptive) questions

A question that contains an assumption about the participant.

<p>Loaded question</p> <p>Why do you enjoy designing outside?</p>	<p>Require qualifying information</p> <p>Ensure that the participant actually enjoys designing outside with a question before this one.</p>
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Double-barreled questions

Convoluted questions involving more than one issue

Double-barreled question

Was the product easy to use and why did you enjoy it?



1

How would you rate this product?

2

On a scale 1-5, how much did you enjoy using the product?



Double-barreled question

How would you rate the lessons and accompanying materials?



1

How would you rate the lessons?

2

How would you rate the accompanying materials (videos, worksheets)?



Double negatives

Double negative occurs when two negatives are used in the same sentence

<p>Double-negative</p> <p>Was the app not incomprehensible?</p>	<p>Fixed</p> <p>How comprehensive was the app?</p>
<p>Double-negative</p> <p>I don't rarely scroll a lot.</p>	<p>Fixed</p> <p>How often do you scroll online?</p>
<p>Double-negative</p> <p>The website isn't simple to use unless I use the footer.</p>	<p>Fixed</p> <p>The website made it easy for me to find what I was looking for.</p>

Jargon

Jargon is a word or phrase specific to only a segment of the population

<p>Question with jargon</p> <p>The PDP page was clear.</p>	<p>Fixed</p> <p>How would you rate the clarity of the page containing product details?</p>
<p>Question with jargon</p> <p>How was meeting with devs?</p>	<p>Fixed</p> <p>How would you rate your experience with product developers?</p>

Not having a goal for the survey

Without the goal, the questions won't be designed to give proper and usable results. "Understanding users" is not a well-specified goal. Also, it will be harder to get a stakeholder buy-in if the goals are not clearly outlined.

Goal example

Find out why there is a massive dropout during onboarding steps



Poor answer scale options

Confusing or unbalanced scales skew the survey results

Frequency question

How often do you check your cellphone in a day?



Overlapping answer options

- a) 0 - 5 times
- b) 5 - 15 times
- c) 15 - 30 times
- d) More than 30 times

Multiple choice question

What device do you usually use to check Supercharge web?



Overlapping answer options

- a) PC
- b) Mobile Phone
- c) Tablet
- d) iPad

*iPad is a tablet



What comes after?

Follow-up

You have done everything, and you have gathered all the necessary data. Your survey is a success. Congrats!

But wait, your job is **not complete yet**. You should follow up with your participants. Thank them for their participation and offer to apply to your recruitment pool.

This way, you can get a deeper insight into your participants. In some cases, they can become your control group. Next time, it will take you less time to search and recruit participants.

Follow-ups are great to motivate non-responders to fill out surveys. Follow-ups can be automated, and there are virtually no downsides to them.

Analysis

After gathering data from participants comes the second stage of research - analysis.

The first step is to weed out for authenticity of the data. Weeding out is easier where you control the recruitment process of the survey. If you had an open invitation via the website or some other channels, you might find some **invalid entries**.

The best indicators are fake names and locations, short completion times, etc.

Record the data on the survey itself. Survey analytics are great for **presenting** to stakeholders. Analytics will show stakeholders the survey's success and how the company spent resources.

The survey report should include the number of finished surveys, completion time, bounce rate, total cost, etc.

When you organize the primary data and analyze it, present it in **graphs and visuals**. Visuals help with information digestion and following the presentation.



Tips and recommendations

If you have a more experienced researcher on the team, always ask them for advice. They will most likely give you an idea or two you can use in your survey.

If you are the only researcher, feel free to ask other team members to get their opinion. They might have noticed something that no one else did, but it is worth checking out.

You can also ask researchers for **tips and advice** outside your company. But in that case, be careful not to break the non-disclosure agreement. Also, don't forget that it doesn't have to be a fellow UX researcher. It can be any researcher since most research principles are the same.

There are many tools available for research these days. Here are some we find **reliable and straightforward** to use 

Recruitment

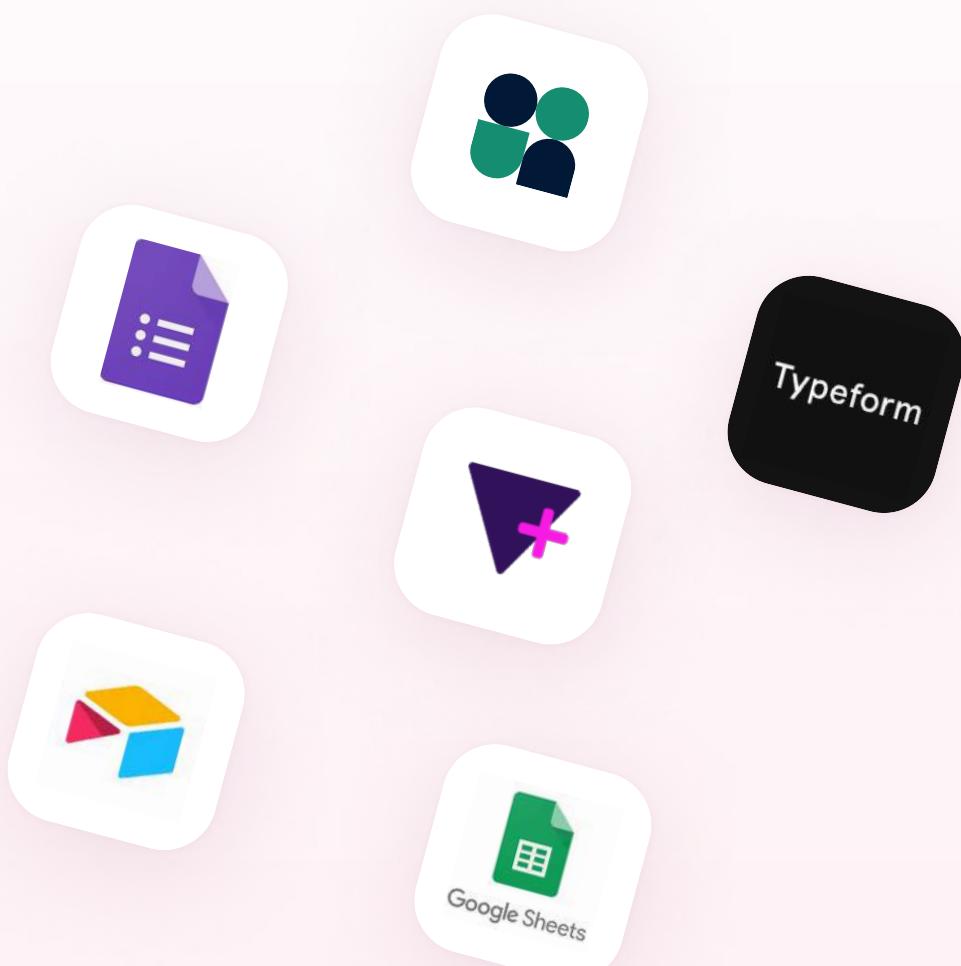
- Userinterviews

Survey creation

- Google forms
- Typeform
- Tally

Analytics

- Airtable
- Sheets



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We believe that we can make the biggest impact in the world by sharing what we know and by allowing others to reach their full potential as product designers. We're hoping this creates a ripple effect and helps make products all around the world more useful, more accessible, and more valuable!

Supercharge Design takes pride in being an ever-growing platform filled with specific, accessible, motivating, relevant, and tailored product design learning resources. And we are extremely happy to have you on board!

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