

13 Conducting Surveys

Learning Objectives

- 1 Explain the advantages and disadvantages of conducting surveys
- 2 Describe the methods of conducting researcher-administered surveys
- 3 Describe the methods of conducting self-administered surveys
- 4 Explain the importance and components of cover letters and emails to survey participants
- 5 Explain the survey process including the training of survey takers

'FRUITY AND FUN': SURVEYS CAN BE USED FOR SOCIAL AND CONSUMER MARKETING

Public health officials in Indonesia were concerned about the spread of AIDS amongst young people. As a result, they asked researchers to help with the development of a campaign to build awareness of safe sex. The researchers' first task was to learn more about the sexual behavior of Indonesian youth. However, the challenge that researchers faced was that there were still many people in that country who held traditional, conservative views regarding sexuality. Therefore a large-scale survey of sexual behavior might be viewed as offensive. The first step to be taken was a review of youth media where it was learned that the content heavily focused on sexual relationships. A personal survey asking about behavior and attitudes toward safe sex was then conducted with young people at locations such as shopping malls. To increase response rates, the survey takers were of the same gender as the participants and the survey took place in a private location. The result? A public health message campaign aimed at young people, along with the launch of 'Fiesta', a range of flavored, colored condoms.

Questions: What controversial social issues would be difficult to research? How would you go about surveying people on these issues?

Source: Purdy, 2006

13.1 Methods of Conducting Researcher-Administered Surveys

After deciding upon a research question, researchers must choose the research methodology that will be used. The most common quantitative technique for collecting primary data is the survey. Survey research involves asking all the participants the same predetermined questions. If researchers decide to conduct a survey, they must then determine the appropriate population to be surveyed, the size of the sample and the sampling method. After these decisions have been made, researchers can write a survey questionnaire.

Researchers must also decide upon a survey method. Methods for conducting surveys can be divided into researcher-administered surveys and self-administered surveys. When researcher-administered surveys are used, participants are assisted in completing the survey either by a researcher or an assistant. With this method participants are helped with any questions they find difficult to answer and are encouraged, if necessary, to complete the survey. With self-administered surveys participants are provided with a survey form, which they then complete on their own.

13.1.1 Researcher-administered surveys

When conducting researcher-administered surveys researchers or their assistants ask the questions and complete the questionnaire forms. The primary methods of conducting researcher-administered surveys are personal face-to-face surveys and phone surveys.

There are three important advantages to conducting researcher-administered surveys. First, if a research participant does not understand the meaning of a question, the researcher can help to clarify the misunderstanding. This will ensure that the question is understood correctly and will, therefore, result in more accurate research data. For example, a college student taking a survey might wonder if a question on yearly income refers to their own or their family's income.

A second advantage of this surveying method is that a researcher can encourage a participant to answer all the questions and complete the questionnaire. Research participants may initially agree to take a survey because they do not want to seem rude when asked to participate. However, once they have the questionnaire they may remember that they are in a hurry to get dinner on the table or to meet friends to see a movie. Because they are in a hurry, participants may skip any confusing questions or just neglect to turn over the survey to finish the second page. Using a researcher-administered method a researcher will notice these omissions and prompt the participants to answer all the questions on the form. In fact choosing helpful and encouraging administrators can increase response rates (Blohm et al., 2007).

There are some groups of people who may distrust any form of marketing research. This would include those groups who may feel disenfranchised from mainstream society. As a result of this feeling of disenfranchisement and the distrust that follows, members of these groups are least likely to participate in surveys. By having someone who is of a similar background personally conducting a survey, members of these groups are much more likely to participate.

Advantages of researcher-administered surveys

- Clarify confusions and misunderstandings
- Prompt participants to complete all the questions in a survey
- Establish a rapport with difficult to reach groups of participants

13.1.2 Self-administered surveys

Some survey methods use paper questionnaires or online survey forms that are self-administered. With these methods there is no researcher physically present during the surveying process. One of the major advantages to using paper and online surveys is that self-administration is much cheaper, as there is no need to pay for a researcher's or assistant's time. Another advantage to using a self-administration surveying format is that a researcher cannot lead a participant in any way to respond with a specific answer to a question. Of course a good researcher is not going to tell a participant how to answer a question. However, when explaining a question to a participant, a researcher may still unintentionally influence their answer. A third advantage of a self-administered survey is that a participant can take their time to complete the form. If they are interrupted during the process of completing the survey, they can even leave the form and come back and complete it at another time.

An additional advantage of having a self-administered survey is that the method allows a participant privacy. When a researcher administers the survey, a participant may be concerned about that researcher's response to their answer. This would be particularly true of answers to questions about personal behavior. However, even with a routine question, participants may want to provide a more positive answer when personally responding to a researcher.

Advantages of self-administered surveys

- Less cost because there is no need to pay for a researcher's time
- A researcher cannot lead a participant to provide a specific response
- A participant can complete the form at their own pace
- There is no concern about a researcher's reaction to the answers

13.2 Researcher-Administered Survey Methods

Researcher-administered surveys can be conducted personally or by using the telephone. In addition, personal surveys can be conducted using computer technology rather than paper questionnaire forms. When in the field conducting interviews, the success of researcher-administered surveys will depend on being organized and treating everyone with respect. In fact, even the tone of voice used can affect whether people are willing to cooperate (Van Der Vaart et al., 2006). A well conducted survey can be repeated over the years to determine trends in consumer preference. An interesting example of this type of change is shown in the box below.

SURVEYS CAN TELL WHAT A BRITISH CUSTOMER BELIEVES IS IMPORTANT

A survey on customer satisfaction in the UK ranked John Lewis stores as Number One. The ranking may not have surprised those who shop at the store. After all, John Lewis has built a reputation on treating customers well. However, what is interesting is that this year's survey, in comparison to previous surveys, demonstrates that customers assess

(Continued)

customer service differently. Ten years ago survey participants listed staff friendliness and helpfulness as important criteria when assessing the level of customer service. In the most recent survey, these attributes were not considered as important.

Does this mean that customers now do not mind rude staff? No, the answer is that customers now take for granted that staff will be friendly and helpful. Instead, the survey revealed that product knowledge is now considered an important criterion of customer service. This is not surprising when one considers that customers can now come into a store with product information they have gathered online. No customer wants to be in a position of knowing more about the product than the sales staff!

Source: Murphy, 2006

13.2.1 Personally-administered surveys

Personal surveying is the predominate method of collecting data in Europe while in the USA it has not been so widely used (Brace, 2004). One of the reasons for its popularity in Europe may be that continent's more concentrated population centers. In the USA the population is more dispersed over a wide geographic area, making telephone surveying a more popular methodology.

Personal surveying has important advantages over telephone surveying as a methodology. With personal surveying researchers are able to use prompt cards or other visual stimuli that will assist participants with their answers. For example, if a question asks if participants have purchased a specific brand of shampoo, a picture of the brand can be shown. Many people can more easily remember a product visually, by remembering what the bottle looked like, than by remembering a specific brand name. If a survey is about consumer preference in the color or style of a product, researchers can have the product ready to view. For food products, participants could be given a sample to taste before they respond to the survey questions. If a research question involves consumer preferences for types of promotion, examples of print ads or video clips of broadcast ads can be shown.

13.2.2 Location of personal surveying

There are a number of different locations where personal surveys can be administered. The natural location for research that involves current customers would be at a business or organization itself. For example, if the organization commissioning the research is a sports team wanting to know more about their fans, the survey could be administered at one of their games. If the organization is a retailer wanting to know about product preferences, researchers could survey shoppers at their store. Of course these locations would only reach current and not potential customers.

For some types of research studies, particularly those dealing with consumer behavior, a participant's home may be the ideal location. This location is particularly useful when the participant is required to answer questions about a product's usability. Having the product nearby in the home, while the survey is being taken, should assist the participant in providing an informed answer. Of course having participants take a researcher-administered survey in their home requires advance permission, scheduling issues, and travel time and cost.

Another location for conducting surveys would be at a place with a number of retail businesses. This type of research is often referred to as ‘mall-intercept surveys’. A large regional shopping mall is a favorite location for conducting personal surveys, as a mall will generally attract a demographically diverse group of shoppers. A large mall will also attract customers from a wide geographic area who will provide a mix of urban, small town and rural potential participants. A large mall will also have a variety of different types of retail, dining and even entertainment options that should draw a psychographically diverse population. While there researchers should chose a number of different times to administer the survey, as different age groups may shop at different times of the day. In addition, they should station themselves beside different businesses that attract a variety of types of shopper. Using personal surveying, researchers stop potential participants and survey on the spot or direct them to a separate area with comfortable seating.

A final location for conducting personal surveys is at a public place where potential participants are gathered. This might be a community park or another civic amenity such as a swimming pool or zoo. Surveys could also be administered on a street corner where a targeted sample of potential participants passes by. Another idea is to conduct a personal survey at a public or community festival. The choice of location would depend on what type of event attracts the required population. Of course it will be necessary to get permission from the city before such surveying takes place.

13.2.3 Computer-aided personal surveys

Technology has provided a means to discard the paper questionnaire form traditionally used when conducting personal surveys. Instead, a computerized tablet is used by researchers to read questions and record answers. A researcher or assistant would still be present but the answers would be recorded electronically. There are important advantages for researchers in using this form of electronic data collection. Researchers will save money as there will be no data entry costs and the recorded answers can be downloaded directly into a computer program for analysis. Besides the cost savings, direct downloading increases reliability by excluding data entry errors. Complex survey forms will often be written with directions for a participant to skip ahead to a specific question based on their response to a previous question. With an electronic form this will happen automatically, minimizing confusion. In addition, the sequencing of questions can be randomized. This is an important consideration if there is any concern that question sequencing might be influencing the resulting answers.

13.2.4 Researcher-administered telephone surveys

The most significant advantage of a telephone survey over personal surveying is that it allows participants to be geographically dispersed. A phone survey can reach potential subjects wherever they live at little extra cost. In addition, participants can be reached that researchers may not be able to survey at a business or in a public place. For example, the elderly may be easier to reach by surveying them at home over the phone rather than in public.

Another advantage of telephone surveys over personal interviewing is that the telephone allows a participant to remain anonymous. As a result, participants may provide information that they may not wish to provide to someone personally. They may also be more willing to provide negative feedback, which they may feel would be rude if delivered in person.

Problems with conducting telephone surveys

There are, however, significant challenges that researchers must overcome when conducting phone surveys. Contacting potential participants is an increasing problem due to the growing number of individuals who rely on their cell phones rather than having a land line. Researchers can purchase phone lists for land lines, but not cell phones. In addition, when calling a home phone on a land line market researchers at least know that individuals are at home and could potentially participate in a survey. Even if market researchers had access to cell phone numbers, using them for a cell phone survey would probably result in a poor response rate. People may be answering their cell phones in a store, or whilst driving, or may even be at work. Individuals thus engaged would usually not be receptive to the idea of taking time to participate in a survey.

Another difficulty is the number of people who have caller ID. Such households may not even answer the phone if a number is not recognized. Another issue that researchers must consider is privacy laws. The popularity of Do Not Call lists means that many households cannot be called for commercial marketing research.

13.3 Methods of Conducting Self-Administered Surveys

Surveys can be self-administered by providing participants with a form using the postal service, email and websites, or even pdas. The mail survey has been the traditional means of delivery for self-administered surveys. However, using technology to deliver questionnaires is becoming increasingly popular. A survey form can be sent to participants in the body of an email and then returned electronically when completed. Another means of delivering the questionnaire electronically is to send potential participants an email with a link that directs them to a website to take the survey. Even text messaging on cell phones and pdas is now being used to ask survey questions. Below is one example of how text messaging is implemented in conducting research.

TEXT MESSAGING RESEARCH

How can instant messaging be used to generate research data? Let me text message you the ways!

- 1 A moderator may use instant messaging to interview a research subject.
- 2 During online focus groups, a moderator may use instant messaging to ask for more in-depth information from a single participant.
- 3 Instant messaging can also be used to notify potential subjects that an online quantitative survey is available.
- 4 During an online survey, certain responses might result in a moderator text messaging a participant to chat.

Instant messaging has become the most popular format of telecommunication among young people. Marketing researchers are now exploiting the advantages of text messaging, as speed is important in certain industries that rely on trends. Text messaging allows a research study to be completed in 24 hours. If the research takes too long, it will be too late to introduce the concept!

Source: Vence, 2006

13.3.1 Mail surveys

One of the primary means of delivering a self-administered survey form to participants is the postal service. There are significant advantages to using mail surveys, which is why they continue to be used by researchers despite the growing popularity of electronic delivery of questionnaires. A mail survey will reach designated households as everyone has a physical address, while not everyone has an email address. There is no problem obtaining a list as there are commercial companies whose business is providing such information to researchers. Marketing researchers could also use a publicly available source such as a voting registration list. The alternative is using a commercial or publicly available list. In addition, mail surveys can be conducted internationally which allows for cross-cultural comparisons (Alam, 2006).

Problems with conducting mail surveys

Of course the success of a mail survey depends on the quality of the mailing list that is being used. A poor quality list that does not target the right households or has old addresses will not save money, as the responses will not provide the needed information or even arrive at households.

While one advantage of using a mail survey means there is no researcher to bias responses, the lack of personal communication can also be a disadvantage. When using a mail survey researchers have no means to encourage completion or to explain questions that respondents might find unclear. Another issue with mail surveys is that researchers must wait for responses to be returned in the mail. The research will take more time to complete as researchers must wait whilst not knowing if participants are going to respond – or if they have thrown the form away and more participants will need to be sought.

13.3.2 Web-based self-completion

Emails are generally not widely used for delivering questionnaire forms because of practical issues. An email attachment that is large enough to contain all the text and formatting for a questionnaire may be too large for a potential participant's computer to handle. In fact, such a large attachment may be screened out as SPAM. However, electronic delivery using email is appropriate for short questionnaires targeted at groups that are familiar with the organization and therefore likely to respond. Most electronic survey forms though will be on separate websites and email will only be used to send the relevant website link that provides access to the form.

There are commercial online survey software packages that can be purchased that will assist in the design of a survey, collect the responses and tabulate the results. The newest products are relatively inexpensive and easy to use. While the fact that the form is electronic does not change the survey questions, it can change the way the questions and answers are presented. Visuals can be incorporated and the sequence of questions can be easily varied.

The major difference in using an online survey versus a mail survey is that the survey results appear immediately. This allows researchers to track the number of responses and send email reminders to those who have not responded. It also allows researchers to change any of the questions that seem to be causing confusion or to reconsider any of the questions that are not being answered.

Difficulties with conducting online surveys

There are also disadvantages to online surveys. First, respondents must have computer access. They must also be computer literate and feel comfortable responding online. While it may be true that a majority of people have computer access, not all types of jobs require people to be

in front of a computer. In addition, not everyone enjoys being online. For those individuals who are not online every day because of their job or personal interests, completing an online survey will mean that they must go online specifically for that purpose, which is not as easy as picking up a pen or answering the phone.

Another disadvantage is that the potential participants who wish to respond to online surveys will be skewed toward younger, better educated individuals. This is fine if a research question addresses a product that is of interest to younger people. However, if a research sample calls for responses from a variety of demographic and psychographic types, online may not be the best methodology to motivate a response (Deutskens et al., 2006).

13.4 Motivating Participation

The response rate is the number of people who respond to a survey compared to the number of respondents who are eligible to participate. Low response rates should be expected (see the box below). In some research studies the sample can be as low as 10 per cent. This is the reason why more sample participants are selected than are needed to meet the sample size requirement. However, there are a few ways in which this response rate can be improved.

LOWER RESPONSE RATES HAVE RESEARCHERS WORRIED

The problem of ever smaller survey response rates was discussed in a meeting between the heads of the five largest global research firms, along with the top executives from those industries that rely on research. They came together to address two major problems: groups who do not respond to surveys and the overall shrinking rate of response. Most agreed that those groups who do not respond to surveys are largely made up of young ethnic minority males. However, all groups are less likely to respond than in the past with overall response rates as low as 10 per cent not uncommon. As a result surveys tend to reach the same respondents repeatedly.

An example of a problem that results from these phenomena is P&G's research effort. The company has spent \$200 million on research using 600 different research companies all trying to get accurate information on consumer preferences. However, dramatically different results were returned by a mail and online survey of a new coffee concept. The online survey rated a new coffee concept as being seventh out of twelve while a mail survey rated the new idea as being top. These dramatically different results were returned even though each survey sample was supposed to represent the same population. In addition, the company found that two online surveys conducted one week apart resulted in different product recommendations!

What are the reasons for these problems? First there is 'opinion fatigue'. Online surveys are now so quick and easy to generate that people are getting too many requests to respond and therefore will decline to participate. Second, the people who are willing to respond to any survey are a very small proportion of the population. Only 0.25 per cent of the population provides 32 per cent of online responses, according to a British research company.

(Continued)

(Continued)

What is the answer? One research company achieves high response rates by paying participants very well. Another researcher suggested the use of shorter surveys of only three questions. Interestingly, no researcher or company recommended conducting research to determine what would motivate more consumers to participate.

Source: Neff, 2006

Of course, the research question and process are of critical importance to marketing researchers. However, this is not true for potential participants. Busy people walking down the street will usually not be pleased when they are stopped and asked to complete a survey form. The first impulse of anyone answering the phone, only to discover there is a researcher on the line, will be to hang up. Imagine people with too little time picking up their mail or clicking on to their email – they will quickly sort through, looking for personal correspondence and work-related items. What is left is usually termed ‘junk’ mail or SPAM and will be quickly discarded.

However, there are reasons why individuals *will* participate, including a desire to assist others, a general interest in giving their opinions, or for personal gain. If the purpose of the research is to help in finding a solution to a problem, those directly concerned with that problem may be willing to help for altruistic reasons. For example, if a survey is to determine people’s attitudes toward global warming those interested in environmental issues are likely to respond. Sometimes research for commercial products may even elicit responses because the use of a specific product is of personal interest to a participant. Subjects such as the use of technology and a choice of entertainment options may motivate participation because the topic is associated with an interesting activity. In addition, some people are always interested in giving their opinion. They may find that the attention they receive fulfills an inner need to be noticed. However, these two reasons will not always be present and therefore researchers must consider the need to motivate participants by using a financial or product incentive in order to complete both a researcher-administered and self-administered survey.

13.4.1 Providing information to potential participants

Some people may choose to participate in a survey because of personal interest in a product or because they believe the results of the survey will help others. Therefore it is of critical importance that any information about who is sponsoring the research and how the results will be used is communicated to potential participants. For personally-administered surveys, this information should be provided verbally. For both mail and online surveys, researchers should enclose or attach a letter that includes this information.

If a covering letter is sent along with a survey form to provide credibility, it should be on a letterhead from either the research firm or the business or organization sponsoring the research. An email request should provide contact information, to allow someone who wants to verify the identity of the sending or sponsoring organization to do so. Both the letter and the email should explain why that particular person or household has been chosen. People are more likely to respond positively if they can understand why they have been chosen to participate. For

example, the letter or email might explain that the survey is being sent to people who work in education or the medical profession. Even if researchers are using a random sample, there will still be a reason why a specific population was chosen.

The letter or email should explain the purpose of the research in terms that someone unfamiliar with such research terminology can understand. This language issue is so important that the covering letter or email should be as carefully tested as the survey form. The explanation should also include information on the research methodology in order that participants will know how the data are being gathered. If the research is of a sensitive nature, information on confidentiality should be given. This should include a reassurance that no participant will be identified by name, that only tabulated total results will be released, and that all forms will be destroyed on conclusion of the study.

The next issue that should be addressed is how participants will benefit from completing the survey form. Some research on social or political issues, while not benefiting individuals directly, will benefit society as a whole. In this case, the letter or email should appeal to the altruistic nature of participants. If this is not the case, the letter or email should describe any financial or alternative incentive that is being offered to those completing the survey.

To encourage completion, the letter or email should discuss the length of the survey and the projected time it should take to complete. Also, to encourage completion it has been suggested that an addressed and stamped letter be included for mail surveys. For online surveys the link for the survey's website should be easily located. It is just as important that even the envelope that contains the survey or the subject line in the email communicates the purpose of the research. After all, no one specifically picks up their mail or reads their emails hoping for the opportunity to participate in a survey (De Rada, 2005). Finally, the letter or email must be brief, must use simple everyday language, should look attractive and must be visually designed to be read easily.

Covering letter or email components

- Place on an official letterhead or provide contact information in an email
- Explain who is being sent the letters (sample) and how they were selected
- Explain the purpose of the research
- Provide information on the methodology
- Assure confidentiality
- Communicate how society or participant will benefit
- Describe the length of the form and the length of time to complete it
- Include mailing instructions and an envelope or a website link
- Place information on the envelope or email subject line

13.4.2 The use of incentives

If the subject of the research is something rather mundane, such as the frequency of auto maintenance or a soft drink consumption preference, most recipients will probably not wish to participate in the survey. In this case researchers must consider the use of an incentive to motivate responses (Teisl et al., 2006). This incentive could be indirect, such as the chance to win a prize. In this case, a respondent who completes the survey may be entered in a prize draw. Because most people will understand that they will probably not win, the prize must be so exciting that the chance of winning will motivate participation. Therefore the incentive chosen should be of particular interest to the population sample being targeted by the research survey

(Saunders et al., 2006). For example, a survey targeting frequent travelers could use as an incentive the possibility of a free trip to the Caribbean, as most people would find this an attractive enough incentive to motivate their participation even if they only had a slim chance of winning.

The incentive could also be direct. A free product, such as a CD, soft drink or poster, could be given to anyone who completes the survey. As this can be expensive, a discount coupon for a product that the company supplies could be offered. For example, for a survey on auto maintenance preferences researchers might offer a coupon from the sponsoring company for a free oil change if the form is completed. This incentive has the advantage of motivating completion and also providing promotion for the company. If researchers do not wish to tie the coupon to a specific company as it may affect participants' answers, a voucher that could be used at one of several companies could be offered instead.

13.5 The Survey Process

The survey process is similar for both researcher-administered and self-administered surveys. First the research question must be written. As with all forms of research this will be a team effort between researchers and management. The research question will help to determine the profile of the sample that will be needed to participate in the research. The next step will be to decide upon the method of conducting the survey, whether the method is researcher- or self-administered. The survey will then be written and tested. The times and locations for researcher-administered surveys must be chosen to meet the needs of participants. For self-administered surveys, the dates for mailing or emailing a survey will need to be decided.

For researcher-administered surveys the next step will be to identify staffing needs and hire and train the personnel who will conduct the survey. After the personnel are hired and trained, the survey can be conducted. For self-administered surveys, the survey is now mailed or the website is opened, after which a researcher will wait for the responses to be returned. Once the data have been returned – either by the survey taker, through the mail or electronically – the results are then analyzed and the report is written (see Figure 13.1 below).

13.5.1 Training survey takers

The success of researcher-administered surveys depends on the skill of survey takers. These survey takers do not need to be professional researchers. Large corporations can use the services of a commercial call center. Small businesses or research companies that only occasionally conduct surveys can hire employees by the hour. This type of part-time job could be attractive to college students or the retired. However, because these employees will not have experience in conducting surveys, it is important to conduct training before the survey process begins.

From the start training should inform the survey takers of the purpose of the research. Survey takers will be more motivated to have participants complete a survey if they understand the importance of the research question. The second step in the training is to explain the structure of the survey and the reasons for the questions. The role of the supervisor or lead researcher should be explained, namely that they are there to assist with difficult participants and to provide general support. The survey takers should also be taught the general rules for conducting successful surveys.

Once training has been completed, the survey takers should first administer the survey on each other. In addition, the supervisor should role-play uncooperative or rude potential participants

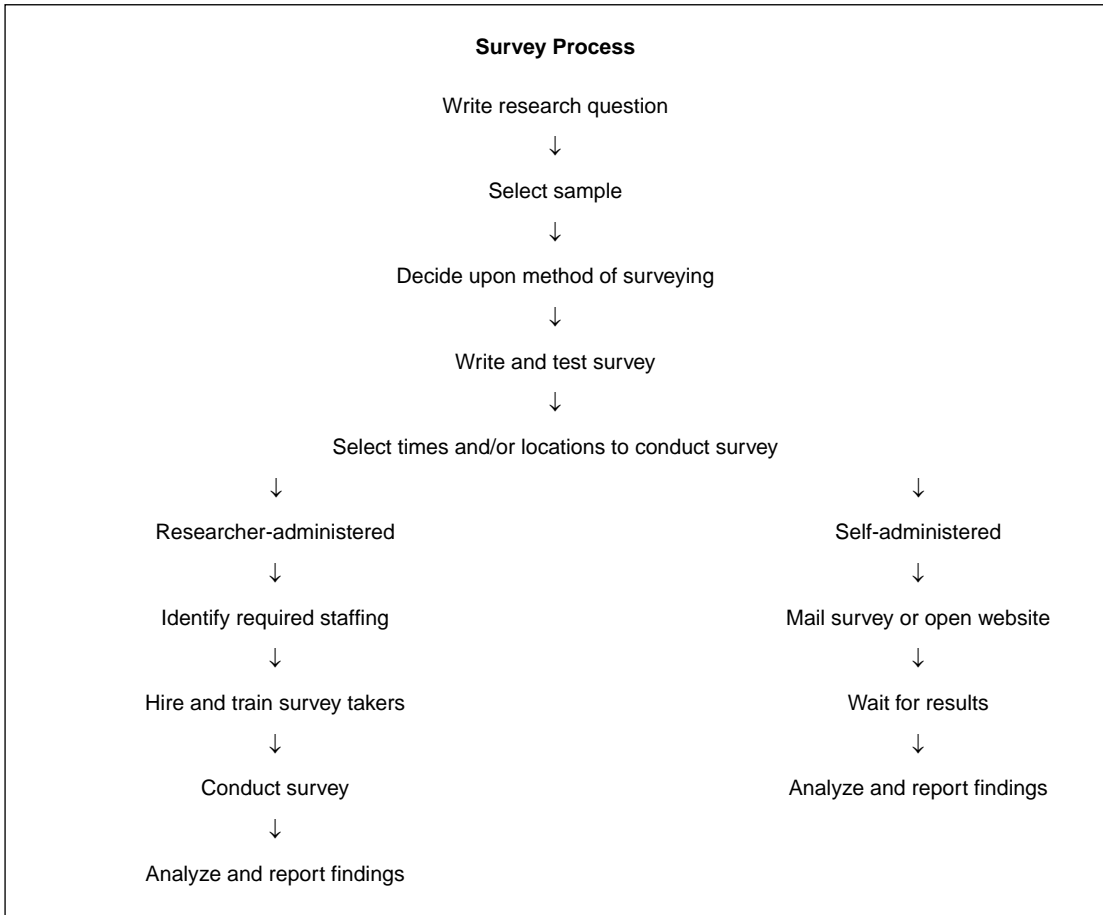


Figure 13.1 The Survey Process

so that survey takers learn how to diffuse such situations. Once survey takers are on the phone or out in the field, the first surveys should be supervised and monitored.

Training survey takers

- Describe the research topic
- Explain the survey structure and the reasons for the questions
- Define the role of the survey taker and the supervisor or lead researcher
- Practise role playing survey taking
- Supervize and monitor first surveys

13.5.2 Conducting a survey

The survey process for both phone and personal surveys should proceed through the same steps. Survey takers should first be trained to introduce themselves and their organization. They then should

explain the purpose of the research and the sample selection process. This information will be from a script written by the researchers. The survey takers should next determine eligibility with one or two screening questions. These can be as simple as asking if the person speaking is head of a household, or in a specific age range, or if they have children living in their household.

After eligibility has been determined survey takers should explain the length of the survey in terms of the time requirement, not the number of questions or pages. They must then obtain consent to proceed with the survey. While the survey is being conducted, a survey taker should be prepared to explain confusing questions without leading a participant to provide any specific response. Finally, a survey taker should always sincerely thank a participant for their assistance.

The process of conducting researcher-administered surveys

- 1 Make the introduction
- 2 Explain the purpose and sample
- 3 Determine eligibility with a screening question
- 4 Explain the time requirement
- 5 Obtain consent
- 6 Conduct the survey, clarifying questions when needed
- 7 Thank the person for their participation

There will be occasions when a survey taker contacts a potential participant who reacts to the request to participate in the survey with rudeness or even hostility. A survey taker should never respond back in kind, as it may damage the reputation of the organization conducting the research. Instead, a survey taker must remember not to take the response personally and simply move on to the next call. At times, some of these people may wish to speak to a supervisor, realizing that the survey taker is not the one responsible for the survey call. Supervisors should always be available to handle these calls and soothe any irate callers.

Summary

- 1 A researcher or an assistant can administer surveys or these can be self-administered. The methods for administered surveys include in person, computer-aided personal surveying and by telephone. The advantages of these methods include the ability to clarify misunderstandings, to prompt completion and to establish rapport. Self-administered surveying includes mail and web-based forms. The advantages to self-administered surveys include less cost, an inability for researchers to bias the response, and participants' ability to complete at their own pace and convenience.
- 2 Personal surveying has the advantage of allowing the use of visual prompts. A researcher can also demonstrate product use. Computer-aided personal surveys use a hand-held device to collect answers. This reduces the cost of data entry while also making complex question sequencing easy to understand. Telephone surveys suffer from low response rates but they still have the advantage of reaching certain groups and providing anonymity.

- 3 Mail and email surveys are inexpensive and with this methodology there is no danger of an interviewer biasing the response. The success of both mail and email surveys depends on the quality of the mailing or email list used to reach participants. Online surveys can be inexpensive to create and should provide researchers with the ability to see results immediately and to track response rates. In addition, results can be analyzed immediately. The disadvantage is that a sample may be skewed towards young people.
- 4 To motivate completion, information that is provided to participants should explain the reason for the research and why a certain subject has been chosen. It should also assure confidentiality and provide contact information for those who wish to assure themselves regarding the legitimacy of the research. Information should also be provided on any financial or product incentive that will be given to the research subject.
- 5 The survey process starts with writing the research question, selecting the sample, and the method of surveying. If the survey is to be administered, the process must include the training of survey takers. Survey takers should train by practicing giving the survey to each other. The trainers should monitor the first surveys conducted by the survey takers.

Key Terms



computer-aided surveys a survey taker records an answer electronically using a small handheld computer screen

researcher-administered survey form of survey taking, including personal and by phone, where a researcher is present while a subject answers the questions

self-administered survey form of survey taking, including paper and online, where a researcher is not present when a participant answers the questions

Discussion Questions

- 1 What would be the advantages of conducting self-administered surveys of professors about their teaching methods?
- 2 Why would you recommend either researcher- or self-administered surveys when conducting a research study that used recent immigrants to the country as a sample?
- 3 Where would be the best location to hold personal interviews on a personal care product? Why?
- 4 Why is it becoming more difficult to get people to respond to any survey?

- 5 What would be the advantages and disadvantages of using online surveys on the current employment of school leavers and university graduates?
- 6 Which population groups would be most willing to complete online surveys? Why do you believe this is the case?
- 7 What information would be important to include in a covering email or letter when conducting a survey of students' opinions of their professor?
- 8 Why would it be critical to train survey takers who were going to conduct a survey of students?

Recommended Reading



Buchanan, Elizabeth (2004) *Readings in Virtual Research Ethics: Issues and Controversies*. Hershey, PA: Information Science Publications. This book contains various articles on the ethical issues involved in conducting online research, including online surveys, internet ethnography and email interviews.

Graeff, Timothy (2003) *The Marketing Research Handbook: A Guide to Conducting Consumer Research*. Dubuque, IA: Kendall/Hunt Publishing. Provides learning exercises for the reader to reinforce the research concepts and also gives sample surveys to analyze.

Grover, Rajiv and Vriens, Marco (eds) (2006) *The Handbook of Marketing Research: Uses, Misuses and Future Advances*. London: SAGE. This book contains articles by 48 marketing experts with an emphasis on how surveys, among other techniques, can be used to gain useful insights into consumer behavior.

Gwartney, Patricia A. (2007) *The Telephone Interviewer's Handbook: How to Conduct Standardized Conversations*. San Francisco, CA: Jossey-Bass. Addresses the issue of how to interview over the phone in spite of the growing reluctance of people to participate. Also covers the topics of professionalism and ethics.

Oppenheim, A.N. (1999) *Questionnaire Design, Interviewing and Attitude Measurement*. New York: Continuum. A very thorough treatment of both the design and conducting of survey research with an emphasis on how questions can be written to successfully measure consumer attitudes.

Sue, Valerie M. and Ritter, Lois A. (2007) *Conducting Online Surveys*. London: SAGE. Evaluates the advantages and disadvantages of online surveys and also provides information on the available software options.