

# Survey Research Methods

## Do's and Don'ts

*Developing a meaningful survey research program*

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# Agenda

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- 5 Phase Research Process
- Case Study – Student Survey on Interest Relief and Loan Repayment, John Mortimer
- Case Study – National Survey on Student Engagement (NSSE), Jennie Piekos
- Wrap-up



## 5 Phase Research Process

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- Phase 1: Define the research problem
- Phase 2: Determine research method and sampling process
- Phase 3: Design questionnaire
- Phase 4: Collect and analyze data
- Phase 5: Write report and recommendations



# 5 Phase Research Process

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## Phase 1: Define Research Problem

- Most critical step
- Problems not clearly delineated: tangled messes
- If not correctly defined, it doesn't matter how good the research is

Example:

*We need to determine why the number of students participating in homecoming activities fell dramatically last year and identify corrective actions*



# 5 Phase Research Process

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## Phase 1: Define Research Problem

- If properly defined, research is more likely to be useful:  
*“The more secure the researcher’s grasp of the problem, the greater the probability that the results of the market research will make a difference and contribute real value to the organization.” (Edward McQuarrie, The Market Research Toolbox, 2006, Sage Publications)*



# 5 Phase Research Process

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## Phase 2: Determine Research Method

- To determine which research method or research technique to use, identify your research objective (s)
- Research objective states what result you hope to achieve through some particular research technique
- *Example: To identify areas of satisfaction and dissatisfaction with our current program among key student groups*



# 5 Phase Research Process

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## Phase 2: Determine Research Method

- By clearly stating the specific information desired, the mind becomes more focused
  
- Consider refining your objective:
  - a) To identify areas of satisfaction and dissatisfaction  
and
  - b) To prioritize areas of dissatisfaction according to degree of negative impact on the institution



# 5 Phase Research Process

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## Phase 2: Determine Research Method

- Now you are ready to articulate a research strategy and develop appropriate sampling strategy (John will discuss in his case study)
- Could use variety of data collection activities to obtain required information
- For example, access **Secondary Sources** or **Scan the Environment** using published documents – journals, Statistics Canada reports and data, etc.



# 5 Phase Research Process

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## Phase 2: Determine Research Method

- **Secondary Sources** are an all-purpose market research tool; great diversity of the types of information available, cheap and quickly obtainable
- Should ask yourself: Has anyone else collected the type of information I need?



# 5 Phase Research Process

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## Phase 2: Determine Research Method

- **May need Primary Data** – obtained through focus group research, survey research, one-to-one customer visits, experiments
- Most common methods are **focus group research** and **survey research**. When do you use them?
- **Focus group research**: You have some sense of what the issues are but are uncertain about the types of answers. Exploratory in nature.
- **Survey research**: If the issues with which you are concerned can be phrased as direct questions that your targets can answer, then interviews or surveys will likely be rewarding



# 5 Phase Research Process

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## Phase 2: Determine Research Method

### Focus Group Research

In the world of market research, a focus group is a particular type of group interview supported by a:

Facility: typically with one-way mirror for client observer and large enough room for 8 – 12 participants

Market research vendor: coordinates entire research project from finding participants to writing the report and taping the sessions

Moderator: has skills in moderating group discussions and managing group interactions



## 5 Phase Research Process

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### Phase 2: Determine Research Method

#### Focus Group Research

Strengths: makes sense to hold in the early stage of the project because they are useful to discover new insights; because sponsor is not identified could hear frank and candid assessments

Weakness: cannot generalize findings to a larger survey population because of the sampling method used to find respondents – can't estimate frequency of an issue but they can reveal its existence



# 5 Phase Research Process

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## Phase 2: Determine Research Method

### Survey Research

- Everything depends on the quality of the questionnaire
- Questions cannot be changed mid-way through the research project
- Cannot interact with respondents to clarify their answers



# 5 Phase Research Process

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## Phase 2: Determine Research Method

### Survey Research

- Surveys can be administered in person (rare), by telephone or self-administered (paper and pencil or electronically)
- The survey questionnaire must be pre-tested. After each “test respondent” completes the survey, they are interviewed about possible misunderstandings, the meaning of their answers and sources of confusion. A survey that may seem perfectly clear to you may be regarded very differently by a respondent



# 5 Phase Research Process

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## Phase 2: Determine Research Method

### Survey Research

Strengths: Provides specific data or precise numerical estimates of the frequency and magnitude of responses; provides objective information; identify any differences between groups; used to generate benchmarks over time

Weakness: Tends to tell you what, not why; survey will not likely reveal what you didn't know you didn't know. "Surveys are a precision tool not a discovery tool"; rely on self-report data;



# 5 Phase Research Process

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## Phase 2: Determine Research Method DO's and DON'Ts

- **Do** plan on using a variety of techniques over the course of a research project
- **Don't** try to squeeze precision out of tools that can't provide it
- **Don't** fixate on specific research tools. Focus on the decision that needs to be made and the information that would be most helpful



# 5 Phase Research Process

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## Phase 3: Questionnaire Design

### Best Practices for the Overall Questionnaire

- Maximize perceived rewards of responding and minimize the perceived costs: in the introduction section of the questionnaire, stress the importance of the survey and value of the respondent's participation.
- Cluster related content and seek a natural flow



# 5 Phase Research Process

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## Phase 3: Questionnaire Design

### Best Practices for the Overall Questionnaire

- Place demographic and other classification questions last
- Lead with questions that are clearly relevant, interesting and non-threatening
- Use plenty of white space and give the tool the most professional appearance possible



# 5 Phase Research Process

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## Phase 3: Questionnaire design

### Best Practices for Question Phrasing

- Keep it simple
- Be specific
- Ask mostly closed-ended questions
- Minimize demands on memory
- Avoid loaded questions



# 5 Phase Research Process

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## Phase 3: Questionnaire Design

### Best Practices for Answer Categories

- Use the right number of answer categories, no more and no fewer than necessary
- Ensure answer categories are mutually exclusive
- Think carefully about whether to include “don’t know,” “no opinion,” or similar “not applicable” categories
- In general, use ratings over rankings



# 5 Phase Research Process

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## Phase 3: Questionnaire Design

### Do's and don'ts

- Do take your time in the design phase. Questionnaires benefit from periods of digestion and time away from the task
- Don't let a desire for precision breed unnecessary complexity. Keep it simple
- Don't give in to a desire for comprehensive coverage. Keep it short



# 5 Phase Research Process

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## Phase 3: Questionnaire Design

### Do's and Don'ts

- Do ask yourself what is the single most important question in the questionnaire. Arrange things so that this question has the chance to receive the full attention of respondents.
- Don't add categorization variables needlessly. For example, if you don't plan to analyze questions by household income, then don't ask for it.



# 5 Phase Research Process

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## Phase 3: Questionnaire Design

### Do's and Don'ts

- Do make mock-up tables showing which items will be used to break out responses on other items. If an item doesn't appear, is it necessary to include it?



## 5 Phase Research Process

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### **Phase 4: Collect and Analyze Data**

- The data is collected using the selected methodology then it is input and computer analyzed using some type of software package, such as SPSS, SAS or Excel.



## 5 Phase Research Process

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### **Phase 5: Report Writing and Recommendations**

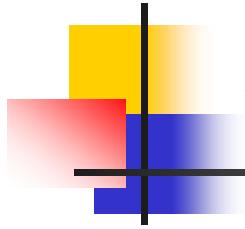
- Report writing, structuring and writing
- Based on findings, prepare recommendations



## Case Study

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### **MTCU Survey on Interest Relief and Loan Repayment: Survey Process and Considerations**



# Case Study

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## National Survey on Student Engagement



# Wrap-up

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**Thank you for your attention**