

MRS. MARKET RESEARCH IN PRACTICE

QUESTIONNAIRE DESIGN

*HOW TO PLAN, STRUCTURE AND WRITE
SURVEY MATERIAL FOR EFFECTIVE
MARKET RESEARCH*

second edition

IAN BRACE



London & Philadelphia

Contents

<i>About MRS</i>	<i>vii</i>
<i>The editorial board</i>	<i>viii</i>
<i>Preface</i>	<i>x</i>
<i>Preface to second edition</i>	<i>xii</i>
Introduction	1
1. Objectives in writing a questionnaire	7
Introduction 7; The questionnaire in the survey process 7; Stakeholders in the questionnaire 9; The objectives of the study 10; Recruitment questionnaires 12; Collecting unbiased and accurate data 12	
2. The data collection media	22
Introduction 22; Interviewer-administered interviews 22; Self-completion surveys 29	
3. Planning the questionnaire	35
Introduction 35; Defining the information required 36; Sequencing the sections 36; Exclusion question 36; Screening questions 38; Main questionnaire 40	
4. Types of question and data	45
Introduction 45; Question types 45; Open and closed questions 46; Spontaneous questions 48; Prompted questions 51; Open-ended questions 51; Pre-coded questions 55; Data types 59	
5. Rating scales	66
Attitude measurement 66; Itemized rating scales 66; Attitudinal rating scales 73; Comparative scaling techniques 84	
6. Applications	90
Rating scales in customer satisfaction research 90; Measuring brand image 93; The dimensions 101	

7. Writing the questionnaire	105
Introduction 105; Use of language 105; Avoiding ambiguity in the question 109; Determining the pre-codes 111; Using prompts 114; Order bias and prompts 117; Question order 123; Standardizing questions 126; Tracking studies 126; Omnibus studies 128	
8. Laying out the questionnaire	130
Introduction 130; Interviewer-administered paper questionnaires 130; Self-completion paper questionnaire 139; CAPI and CATI 146	
9. Online questionnaires	148
Introduction 148; Replicating existing approaches 149; Enhancing the experience 159	
10. Piloting the questionnaire	174
Introduction 174; Why pilot questionnaires? 174; Types of pilot surveys 177	
11. Ethical issues	184
Introduction 184; Responsibilities to respondents 185; Responsibilities to clients 193	
12. Social desirability bias	195
Response bias 195; Social desirability bias 195; Dealing with SDB 198; Determining whether SDB exists 206	
13. International surveys	208
Introduction 208; Client presence 209; Common or tailored approaches 209; Translating the questionnaire 214; Demographic data 217; Cultural response differences 217; Laying out the questionnaire 218	
<i>Appendix 1: Example questionnaire</i>	220
<i>Appendix 2: The Market Research Society Code of Conduct</i>	262
<i>References</i>	286
<i>Further reading</i>	292
<i>Index</i>	294

About MRS

- With members in more than 70 countries, MRS is the world's largest association serving all those with professional equity in provision or use of market, social and opinion research, and in business intelligence, market analysis, customer insight and consultancy.
- MRS has a diverse membership of *individuals* at all levels of experience and seniority within agencies, consultancies, support services, client-side organizations, the public sector and the academic community.
- It also serves MRS Company Partners agencies, suppliers of support services, buyers and end-users – of all types and scale who are committed throughout their *organizations* to supporting the core MRS values of professionalism, research excellence and business effectiveness.
- In consultation with its individual members and Company Partners, MRS supports best practice by setting and enforcing industry standards. The commitment to uphold the MRS *Code of Conduct* is supported by the Codeline service and a wide range of specialist guidelines.
- MRS contributes significantly to the enhancement of skills and knowledge by offering various qualifications and membership grades, as well as training and professional development resources.
- MRS enables its members and Company Partners to be very well-informed through the provision of a wide range of publications, information services and conferences.
- MRS offers many opportunities for meeting, communicating and networking across sectors and disciplines, as well as within specialisms.
- As 'the voice of market research', MRS defends and promotes research in its advocacy and representational efforts.
- Through its media relations and public affairs activities, MRS aims to create the widest possible understanding of the process and value of market, social and opinion research, and to achieve the most favourable climate of opinion and legislative environment for research.

The editorial board

SERIES EDITORS

David Barr has been Director General of the Market Research Society since July 1997. He previously spent over 25 years in business information services and publishing. He has held management positions with Xerox Publishing Group, the British Tourist Authority and Reed International plc. His experience of market research is therefore all on the client side, having commissioned many projects for NPD and M&A purposes. A graduate of Glasgow and Sheffield Universities, David Barr is a Member of the Chartered Management Institute and a Fellow of The Royal Society of Arts.

Robin J Birn has been a marketing and market research practitioner for over 25 years. In 1985 Robin set up Strategy, Research and Action Ltd, which is now the largest international market research company for the map, atlas and travel guide sector, and the book industry. He is a Fellow of the Market Research Society and is also the editor of *The International Handbook of Market Research Techniques*. He is currently Client Services Director at Research International Ltd.

ADVISORY MEMBERS

Martin Callingham was formerly Group Market Research Director at Whitbread, where he ran the Market Research department for 20 years and was a non-executive director of the company's German restaurant chain for more than 10 years. Martin has also played his part in the market research world. Apart from being on many committees of the MRS, of which he is a Fellow, he was Chairman of the Association of Users of Research Agencies (AURA), has been a council member of ESOMAR, and has presented widely, winning the David Winton Award in 2001 at the MRS Conference.

Nigel Culkin is a Fellow of the Market Research Society and member of its Professional Advisory Board. He has been a full member since 1982. He has been in academia since 1991 and is currently Deputy Director, Commercial Development at the University of Hertfordshire, where he is responsible for activities that develop a culture of entrepreneurship and innovation among staff and students. He is Chair of the University's Film Industry Research Group (FiRG), supervisor to a number of research students and regular contributor to the media on the creative industries.

Professor Merlin Stone is Business Research Leader with IBM's Business Consulting Services, where he works on business research, consulting and marketing with IBM's clients, partners and universities. He runs the IBM Marketing Transformation Group, a network of clients, marketing agencies, consultancies and business partners, focusing on changing marketing. He is a director of QCi Ltd, an Ogilvy One company. Merlin is IBM Professor of Relationship Marketing at Bristol Business School. He has written many articles and 25 books on marketing and customer service, including *Up Close and Personal: CRM @ Work*, *Customer Relationship Marketing*, *Successful Customer Relationship Marketing*, *CRM in Financial Services* and *The Customer Management Scorecard*, all published by Kogan Page, and *The Definitive Guide to Direct and Interactive Marketing*, published by Financial Times-Pitman. He is a Founder Fellow of the Institute of Direct Marketing and a Fellow of the Chartered Institute of Marketing.

Paul Szwarc began his career as a market researcher at the Co-operative Wholesale Society (CWS) Ltd in Manchester in 1975. Since then he has worked at Burke Market Research (Canada), American Express Europe, IPSOS RSL, International Masters Publishers Ltd and PSI Global prior to joining the Network Research board as a director in October 2000. Over the past few years Paul has specialized on the consumer financial sector, directing multi-country projects on customer loyalty and retention, new product/service development, and employee satisfaction in the UK, European and North American markets. Paul is a full member of the Market Research Society. He has presented papers at a number of MRS and ESOMAR seminars and training courses.

Preface

When I was asked if I would be interested in writing this book, I was not at all sure that there would be enough to say to fill it. When I talked to other people about the subject, their reaction, particularly amongst non-researchers, was usually that it was going to be a short book. It did not take long, though, for me to realize that the opposite was going to be the case.

After 30 years of writing market research questionnaires, I had forgotten how much I now took for granted: the issues of question wording, bias, question order, layout and translations are all things that market researchers deal with on a day-to-day basis. They learn the skills through training, and hone them through practice.

It is increasingly the case nowadays that the questions have already been written. Most of the big research companies use standard formats or techniques for much of their business; some big manufacturing companies have standard approaches to specific types of research study; or studies have been carried out before. For many market researchers there is less opportunity now than there once was to hone these skills through continual use. All the more need, therefore, for a work to which they could refer.

Mainly, though, this book is aimed at students and new entrants to the market research industry. It is intended to provide them with an overview of the role of the questionnaire in the survey process, together with information on all of the options, alternatives, dilemmas and dangers that they are faced with when they set out to write a questionnaire that they hope will collect accurate data about people, their behaviour and their attitudes.

There is rarely a correct way to ask any question. Almost everything can be asked in a number of different ways. What I have tried to do in this book is to avoid being prescriptive and to provide students or practitioners with guidance on how to think about the questions and the questionnaire. They can then decide for themselves what is the best approach for their situation.

Inevitably, the book reflects my own experience and the types of research project on which I have worked. However, as that experience has covered most types of research and most markets, I hope that readers will not find it too narrow.

Of course there are many people I must thank for their help. In particular I must thank Professor Clive Nancarrow, Phil Graham, Sue Nosworthy, Dr Steve Needel and Stuart Thomlinson for their input and for providing material, and Nigel Spackman for his support. I also owe many thanks to Pat Molloy and Geoffrey Roughton at Conconfirm for agreeing to provide a copy of their Visual QSL software on the website, which will enable readers to write their own questionnaires. I must also thank David Barr at the Market Research Society for suggesting that I write this book in the first place. Finally I must thank my wife, Pat, for living with this book for so long.

Preface to second edition

It is only four years since the first edition of this book appeared, but in that time there have been a number of exciting new developments in data collection techniques. In particular we have seen a massive increase in online data collection coupled with, and based on, an increasing acceptance of it as a medium that can provide samples sufficiently representative of most sectors of the population to provide data for many commercial decisions. This has been accompanied by an upsurge in research on how online questionnaires work and how they can be improved, not just replicating traditional question methodologies, but using the strengths of the medium to ask questions differently and to collect data in new ways.

It is to reflect those changes that I feel that there is a need to update this book with a greater emphasis on online questionnaires and the new techniques associated with them.

I would like to thank my colleagues at TNS for supplying me with material, in particular Arno Hummerston for permission to show some of the online techniques used by TNS, and also AJ Johnson at Ipsos-MORI for permission to show some of their material as well, and to Pete Cape at Survey Sampling International for his help.