

More Insights, Tools, and Techniques For Writing Better Screeners

May 12, 2017

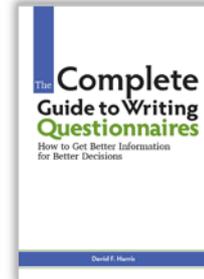
Introduction



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- President of **Insight & Measurement**
 - Segmentation, Package Design,
 - Concept Testing, and Positioning Research
- Author of, *The Complete Guide to Writing Questionnaires: How to Get Better Information for Better Decisions*, 2014
- The science and art of questionnaire design
- “Our questionnaires feel like conversations”



Screeners are Questionnaires

Questionnaires

2. Open-end questionnaire: For open ended questions the researcher does not provide any options to answer. Questions are open to any descriptive response.

Example:

Q. what do you do to keep yourself healthy?

○ Based upon the method of administering,

- 1. Mail questionnaire**
- 2. Face-to-face administered questionnaire**

Questionnaire as instruments

- Most survey research relies on the use of questionnaire to measure variables
- Demographic variables
Demographic variables are used to describe the characteristics of the people who are surveyed. Measures such as race, ethnicity, age and socio economic status. The accuracy and precision of questionnaire as survey research instrument depends upon the expertise and care that go into their construction
- The accuracy and precision of questionnaire requires expertise and care in their construction
- Self-report scales Used to measure peoples judgments or attitude about items presented on the scale
e.g., coffee, political candidates, life events
To determine differences among people on some dimensions presented on the scale
e.g., personality traits, amount of stress

Reliability

- Reliability refers to the consistency of measurement.
- Reliable test should yield similar (consistent) results each time it is taken
- Common method: test-retest reliability

FACTORS AFFECTING RELIABILITY:

- Number of items
- Variability
- Condition in which the questionnaire is administered

Constructing a questionnaire:- *Deciding type, writing a draft, pretesting, concluding with specific procedures.*

STEPS:

1. Decide what information should be sought
2. Decide what type of questionnaire should be used
3. Write a first draft of the questionnaire

Key Screener/Questionnaire Problems

Too Long

- Wear respondents out
- Quality of answers goes down

Unclear & Biased Questions

- Didn't screen for what you thought
- You get artificially positive information

Missing Screening Questions

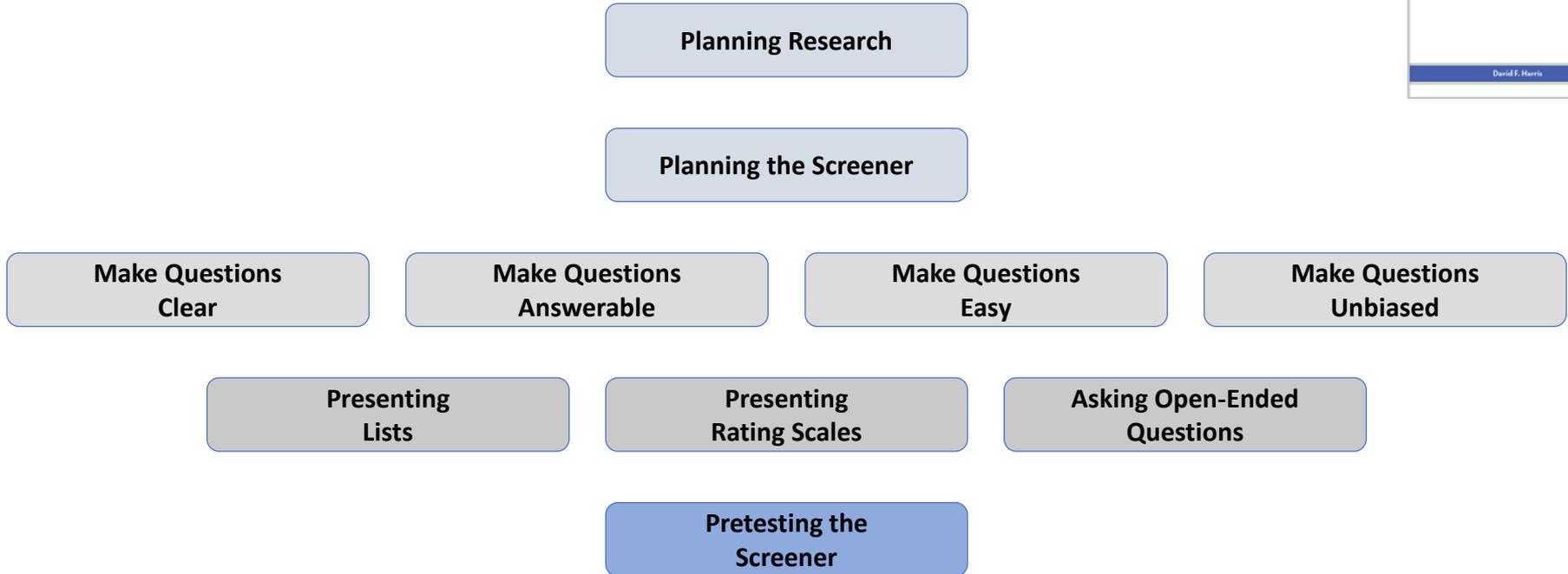
- “But we wanted people who actually...”
- “How come three of them...”

Learning Objectives

“The real voyage of discovery consists not in seeking new landscapes, but in having new eyes.” - Marcel Proust

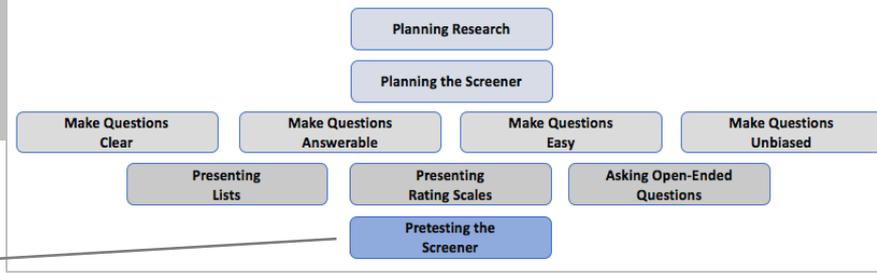
- See writing screeners with new eyes
- Key guidelines on how to write better screeners
- Experimental evidence that question **wording** and **format** make enormous differences
- Let's learn together and have fun!

Framework for Writing Screeners



Proper Pretesting

Pretesting the Screener



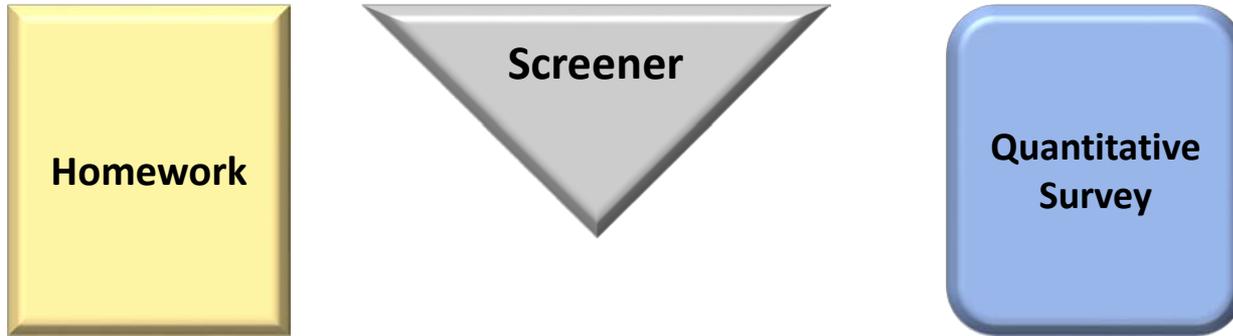
Probes:

- “Can you repeat the question in your own words?”
- “How did you come up with your answer to that question.”
- “What does the term, ‘priority choice,’ mean to you?”

Gordon B. Willis, *Cognitive Interviewing: A Tool for Improving Questionnaire Design* (Thousand Oaks, CA: Sage Publications Inc., 2005).

Screener Planning & Consulting: The Rules

- The only questions that go in a screener are those **necessary** to determine eligibility
- Ask the questions that will **disqualify** the most people sooner rather than later
- Make questions as **easy** as possible
- By **applying good questionnaire-writing and consulting skills**, we can get most screeners down to between 5 and 15 questions



Screening Planning & Consulting

Make the distinction between:

Information needed



How to write the questions

Talk to clients about the information they need, not about how to write questions.

**“Pretend we are having coffee and I am a respondent.
How would you ask me that question?”**

Example:

Q: How would you rate the technical abilities of the person who serviced your computer?

Avoid “Questionnaire Design Speak”

“What percent of your most recent purchases of individually packaged food items are your priority choice?”

“In the past 30 days, how many times have you frequented a fast-casual restaurant?”

Client says, “Have them rate on a scale of 1 to 10...”

Talk to Clients About the Information They Need

Q: Which of the following best describes your role in purchasing food for the family?

- I am the primary shopper for food
- I share the responsibility equally with another person in the household
- I purchase food from the store but less frequently than others household members
- I am not involved in food shopping

Q: Who does most of the grocery shopping for your household?

- You
- Someone else in your household
- You and someone else in your household share equally in grocery shopping

Screener Planning & Consulting

Information Needed	How to Ask the Question	Notes
Find out if they like fresh tomatoes		Do they understand term, "fresh tomatoes?"
How often do they buy tomatoes from the grocery?		What about farmer's markets?
Attitudes towards organic foods		Organic produce vs organic foods?
Do they prepare meals at home at least twice a week		Respondent or family member?

Weeding Out Fake Respondents

Have a few trap questions.

In the past 3 years, have you...

Vacationed on Klopp Island Yes No

Purchased a Campolini Vaccum cleaner Yes No

Ask for information at separate times:

What is your age?

What is your birthday?

Re-screening:

Recruit a few extra, and interview them prior to research to make sure you get the right people.

The Science and Art of Questionnaire Design:

Learn enough about bias and scaling so that you can get who you really want.

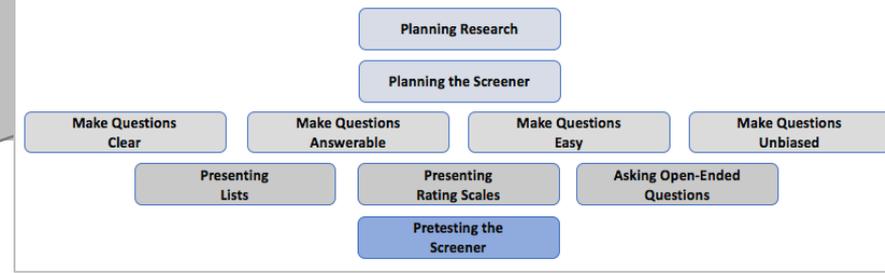
By Phone

At Facility

Writing the Screener, or Short Questionnaire

- Learn enough about the science and art of questionnaire design
- Rid ourselves of bad habits in questionnaire-writing culture
- Become obsessive about:
 - Making concepts clear and concrete
 - Using the vocabulary of customers
- Use forced-choice tasks (instead of agree/disagree scales)

Guidelines for Writing Questions



Make Questions Clear

1. State the unit of measurement.
2. Use the vocabulary of respondents.
3. Use precise words and phrases.
4. When using the word “you,” make sure respondents know to whom you are referring.
5. Make sure the question is really asking only one question.
6. When asking for percentages, make sure the base is clear.
7. Make sure the question stem and the answer choices match each other.
8. Use bold, underlining, italics, and/or capitalization to highlight key words and phrases.

I routinely read the labels for packaged food items to know the ingredients.

My company cares about employee education and development.

I am concerned about my health, so I often take vitamins.

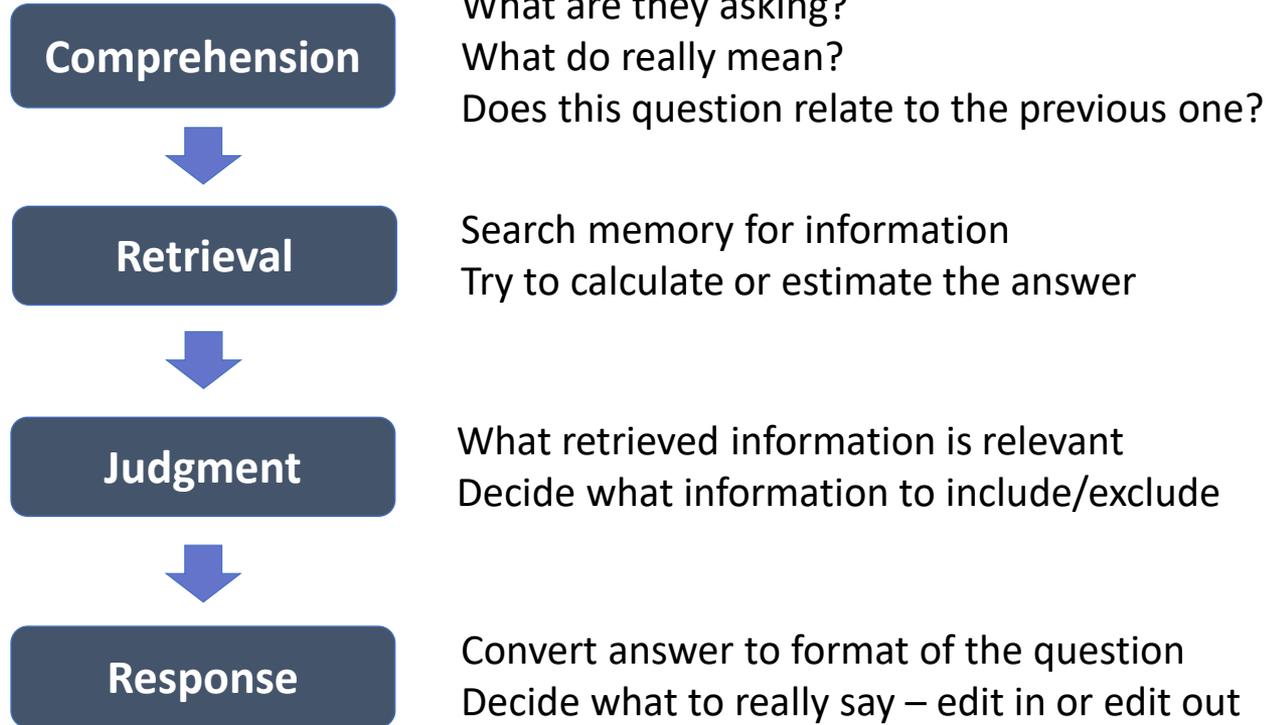
Make sure your question is only one question
Make concepts clear and concrete

How many times have you talked to a doctor in the past 12 months?

Linguistics:

- Conversational norms
- Assuming intent

The Question Answer Response



Make Questions Clear

In a typical month, about how many patients do you treat for blepharospasm?

___ # patients treated for blepharospasm

In a typical month, about how many patients do you inject for blepharospasm?

___ # patients treated for blepharospasm

In a typical month, about how many patients do you yourself inject for blepharospasm?

___ # patients treated for blepharospasm

**Use precise terms and phrases
Properly pre-test your questions**

Scaling

Bipolar Scales versus Unipolar Scales

Bipolar: How satisfied or dissatisfied were you with...

Very dissatisfied	Somewhat dissatisfied	Neither satisfied nor dissatisfied	Somewhat satisfied	Very satisfied
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Unipolar: How satisfied were you with...

Not at all satisfied	Somewhat satisfied	Satisfied	Very satisfied	Extremely satisfied
<input type="radio"/>				

Conduct Experiments to Improve Our Knowledge of How to Write Questionnaires



We randomly assigned 1,200 people:

Group A
n=400

Group B
n=400

Group C
n=400



Experimentally Testing Scaling Options

I always look for the lowest priced option when I shop

Group A
n=400

Agree / disagree

Group B
n=400

**How well does each
statement describe you?**

Group C
n=400

**Forced-choice: Which
statement describes you better**

Agree/Disagree versus “How Well” Scale

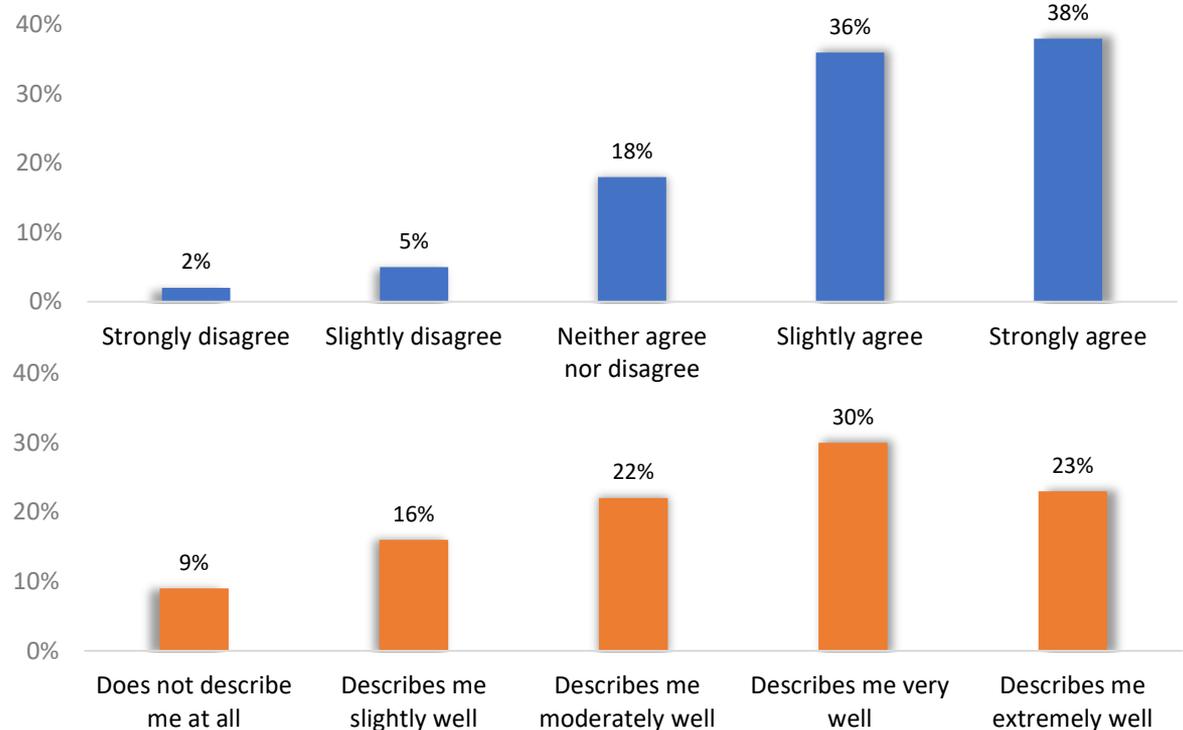
Group A

How much do you agree or disagree with each of the following statements?

Group B

How well, or not well, do each of the following statements describe you?

I always look for the lowest priced option when I shop



Agree/Disagree versus Forced Choice

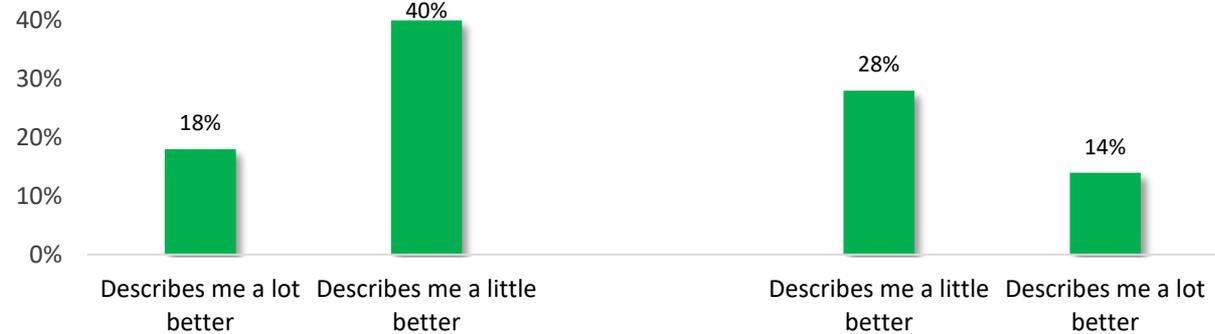
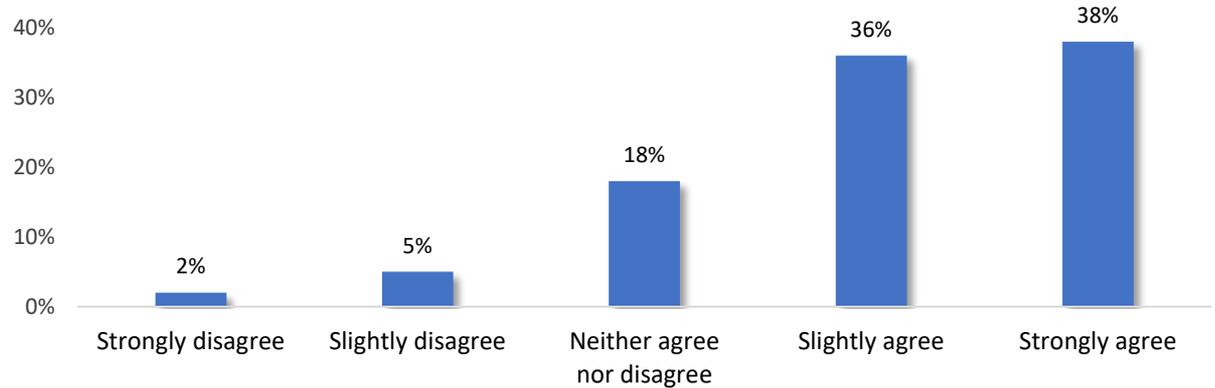
Group A

How much do you agree or disagree with each of the following statements?

Group C

Below are pairs of statements that may or may not describe you. Please indicate how much better one statement describes you compared to the other statement.

I always look for the lowest priced option when I shop



I would rather pay more for quality

I always look for the lowest priced option when I shop

Bottom Line: Don't Use Biased Agree / Disagree Scales

	Does not describe me at all			Describes me very well
	1	2	3	4
I worry about climate change	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I support recycling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I try to eat organic foods	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Have people make choices:

	Describes me a lot more	Describes me a little more	Describes me a little more	Describes me a lot more	
I worry about climate change	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	I do <u>not</u> worry about climate change
I support recycling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	I do <u>not</u> support recycling
I try to eat organic foods	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	I do <u>not</u> try to eat organic foods

* RANDOMIZE left to right, top to bottom

Choices Instead of Agree / Disagree Scales

Q: Which of the following are the two least important and two most important issues for you in the upcoming election? Please select two items per column.

Least Important	Issue	Most Important
<input type="radio"/>	Income inequality	<input type="radio"/>
<input type="radio"/>	Climate change	<input type="radio"/>
<input type="radio"/>	Gun control	<input type="radio"/>
<input type="radio"/>	Race relations	<input type="radio"/>
<input type="radio"/>	Immigration	<input type="radio"/>
<input type="radio"/>	Campaign finance	<input type="radio"/>

Experimentally Testing Statement Wording

I enjoy athletic activities

I enjoy watching and participating in athletic activities

Better to task separately:

- I enjoy watching athletic activities
- I enjoy participating in athletic activities

Unclear and Double Barreled Words and Phrases

Group B

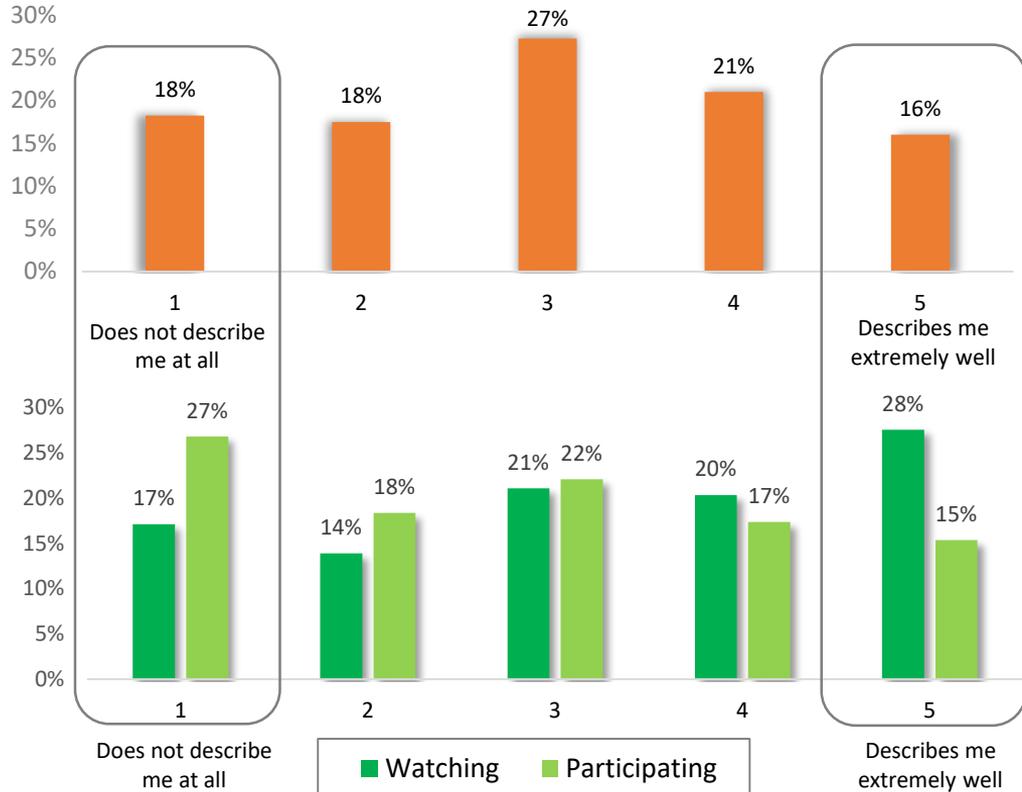
How well, or not well, do each of the following statements describe you?

- I enjoy athletic activities

Group C

How well, or not well, do each of the following statements describe you?

- I enjoy watching athletic activities
- I enjoy participating in athletic activities



Unclear and Double Barreled Words and Phrases

Group A

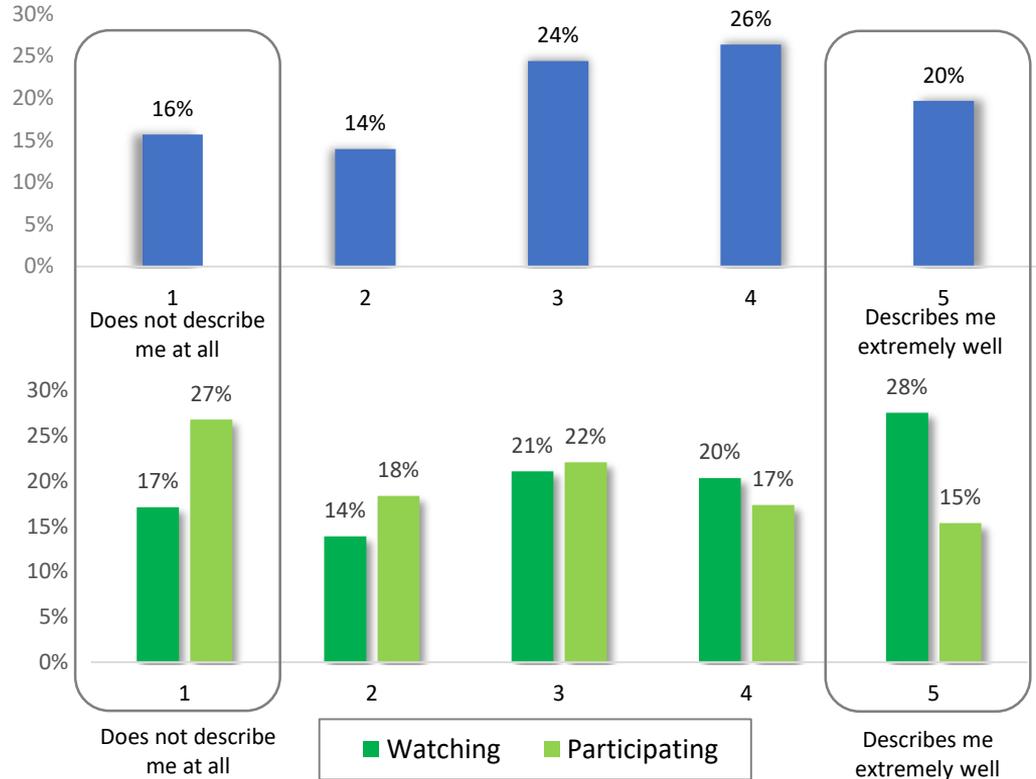
How well, or not well, do each of the following statements describe you?

- I enjoy watching and participating in athletic activities

Group C

How well, or not well, do each of the following statements describe you?

- I enjoy watching athletic activities
- I enjoy participating in athletic activities



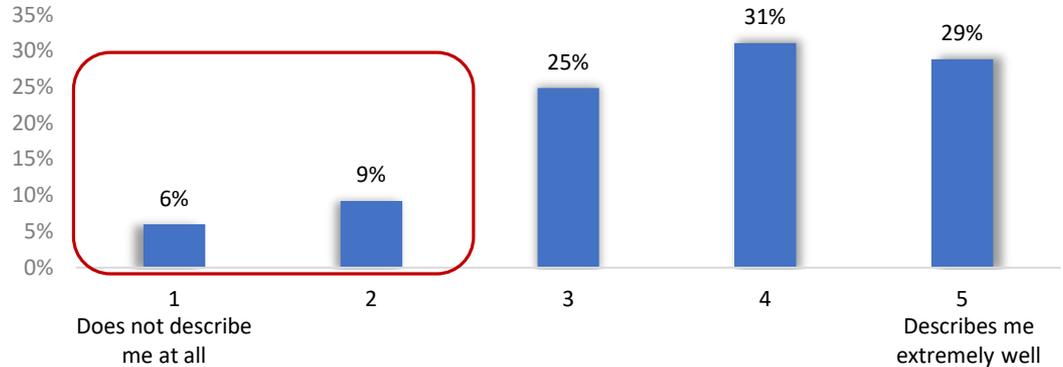
When shopping for food, I read labels for ingredients and calories and/or fat content

Unclear and Double Barreled Words and Phrases

Group A

How well, or not well, do each of the following statements describe you?

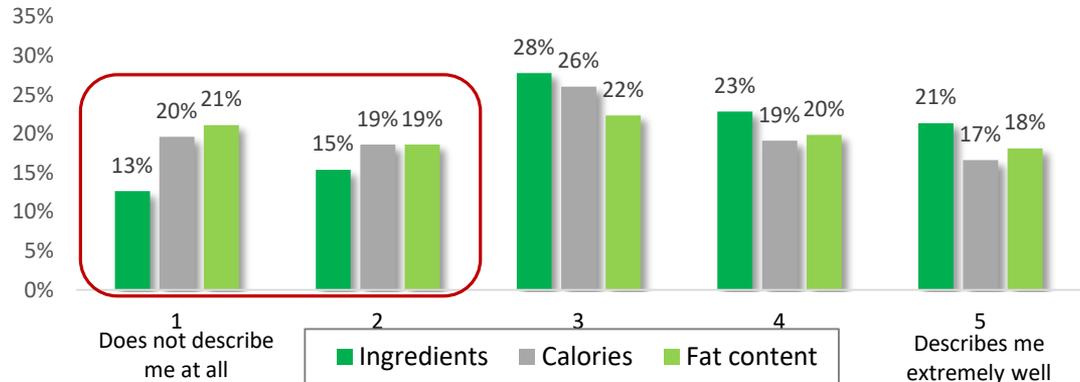
- When shopping for food, I read labels for ingredients and calories and/or fat content



Group C

How well, or not well, do each of the following statements describe you?

- When shopping for food, I read most labels for ingredients
- When shopping for food, I read most labels for calories
- When shopping for food, I read most labels for fat content

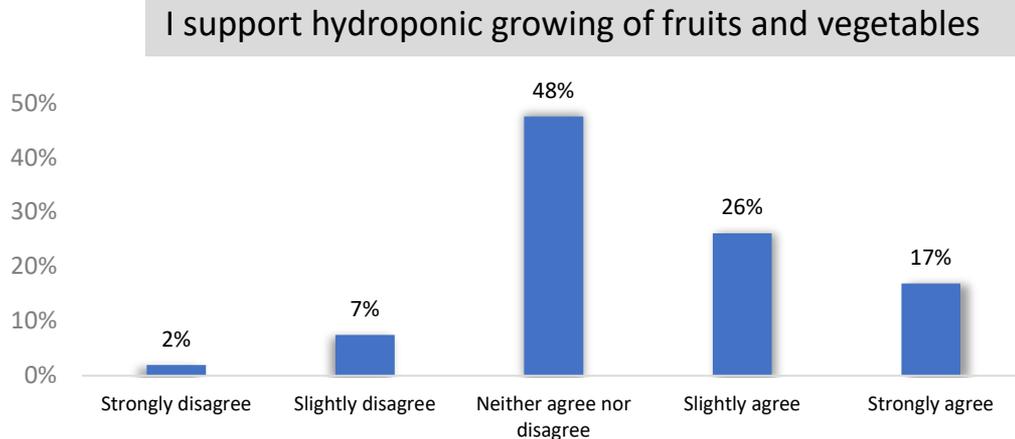


Measuring Knowledge and Use of “Don’t know”

Group A

How much do you agree or disagree with each of the following statements?

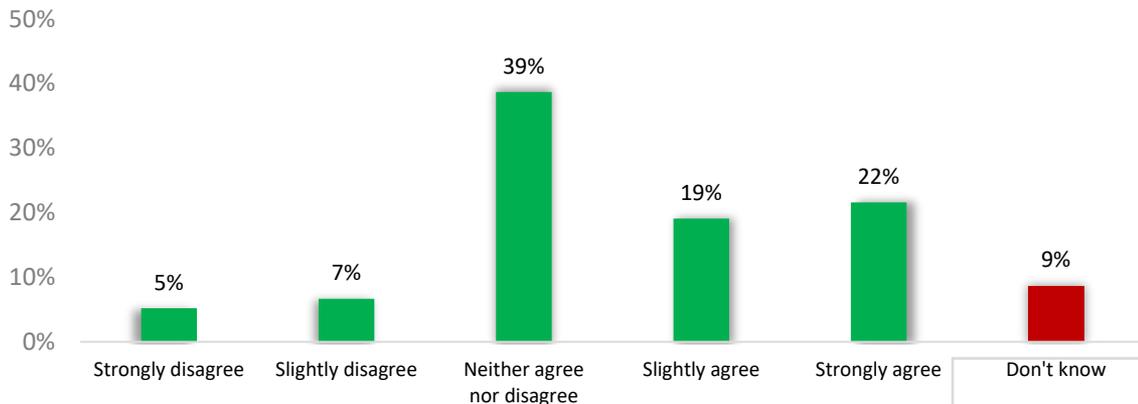
- I support hydroponic growing of fruits and vegetables



Group C

How much do you agree or disagree with each of the following statements?

- I support hydroponic growing of fruits and vegetables



Measuring Knowledge and Use of “Don’t know”

Later in survey, we asked:

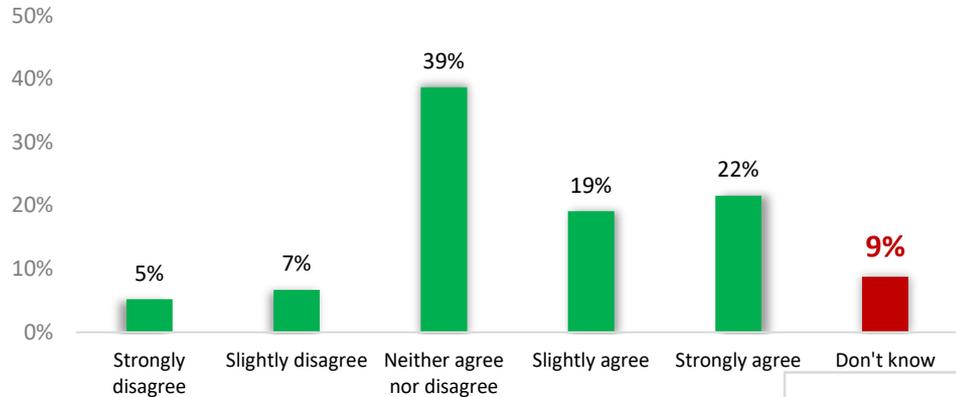
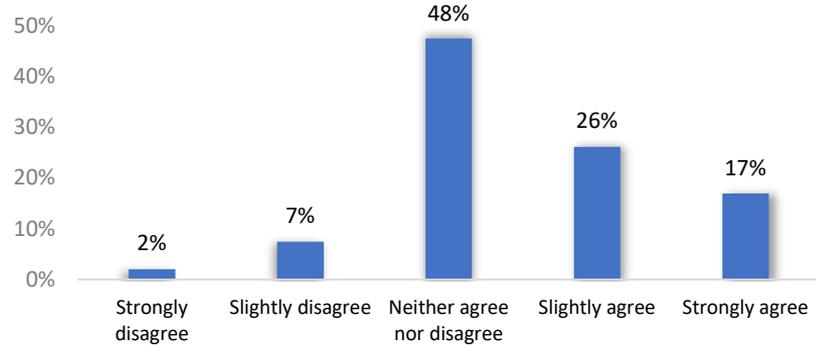
Group A

Do you know what the phrase, "hydroponic growing of fruits and vegetables," means?

Yes 57%

No 43%

I support hydroponic growing of fruits and vegetables



Adding “Not sure” to Yes/No Questions

Group A

Do you plan to purchase any organic produce (fruits and/or vegetables) in the next 30 days?

Yes	66%
No	34%

Group B

Do you plan to purchase any organic produce (fruits and/or vegetables) in the next 30 days?

Yes	50%
No	21%
Not sure	29%

Group C

How likely are you to buy organic produce (fruits and/or vegetables) in the next 30 days?

Definitely will buy	27%	} 50%
Probably will buy	23%	
Might or might not buy	26%	
Probably will not buy	14%	} 23%
Definitely will not buy	9%	

Wrap Up

“The real voyage of discovery consists not in seeking new landscapes, but in having new eyes.” - Marcel Proust

- See screener writing with new eyes
- Talk to clients about information needed, not how to write questions
- Trap questions, forced-choice and re-screening to make sure you are getting the right respondents
- Instead of agree/disagree scales, use “How well” and forced-choice
- Be obsessive about how people might interpret concepts

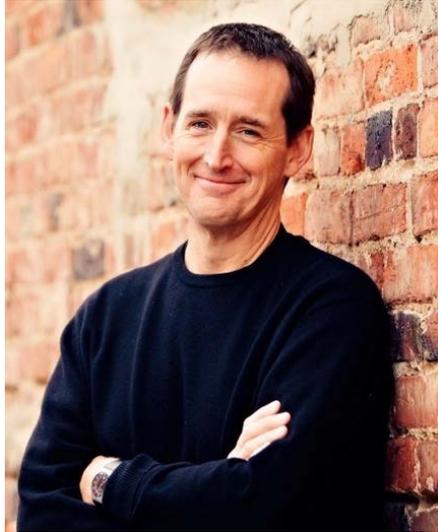
Your screeners will feel like conversations

Improve the quality of your qualitative research

Save time and money, too!

Time for Q & A

If you have any questions or ideas, don't hesitate to contact me:



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