

Tips for designing surveys



This document provides simple tips for designing surveys to help evaluate your knowledge translation (KT) activities.



Survey questionnaires are a common evaluation tool. They can collect information quickly from large numbers of people and are relatively inexpensive. Surveys can be done on paper, by email, verbally or online. Some examples of platforms where you can load surveys online are [here](#). Cochrane does not endorse any provider.

It is worth spending some time designing and testing your survey. This document provides some ‘top tips’. But no matter how much time you put into developing your survey, it will not be perfect. Every survey has good points and challenges.

Tip 1: Be clear what you want to achieve

- Consider whether a survey is the **best way** to collect the information you need. If you want a lot of detail or need to ask complex or sensitive questions, then a survey may not work for you.
- Think about whether a survey is appropriate for your **target audience**. Some people don't feel comfortable reading or answering questions online or may not speak the same language. If you're doing an online survey, you might not get many responses from older people or those without easy access to the internet.
- Begin developing survey questions by brainstorming the **types of answers you want**, not the questions you want to ask. You probably want feedback that will inform your decisions. Write down the answers you want (e.g. X% of people were aware of Cochrane evidence) and use that as a starting point to develop questions. This will help you include all of the questions you need and avoid adding too many extra questions that aren't important.
- If you need to be able to **generalize** the results to a large group, make sure you will be able to get enough people to answer your survey.

Tip 2: Use simple question wording



- You might need to use different question wording and question types depending on whether your survey will be done via email, online, telephone or paper.
- Make your questions as specific as possible to **address your evaluation purpose** and goals.
- Use question wording that is **simple** and direct. Words may mean different things to different people.
- Try to be as specific as you can in your questions e.g. How often have you visited the Cochrane Library in the past month? Ask about things over **defined periods** of time (e.g. in the past two weeks) rather than asking about ‘typical’ behaviour.
- **Avoid jargon**, abbreviations and complex words.
- Ask **only one question** at a time. It is a common mistake to ask two questions at once e.g. has your knowledge and confidence improved? This makes it difficult to interpret the answers because you don’t know which part of the question people were answering e.g. knowledge or confidence or both.
- **Break down** large or complicated ideas into more than one question. For instance, instead of asking how satisfied people are, you might ask whether they think Cochrane evidence is relevant, whether it is easy to access and whether they trust it.
- Avoid questions that **lead** the participant towards a certain answer. Ask a friend or colleague to check your survey, particularly looking out for any questions that are worded as though they have a right or wrong answer. If someone can guess they answer you’re looking for, then you might need to rewrite the question.
- For closed-ended / multichoice questions try to include a comprehensive range of **possible answers**. People will often not insert anything extra into an ‘other’ category and it can take a long time to read and classify those comments afterwards.
- Ask people to respond about what **they** think or do themselves. People give more accurate answers when recalling information about themselves than thinking about others.
- Avoid ‘don’t know’ or ‘neutral’ categories unless they are important or relevant to the question. Leaving these out can encourage people to select a response. But be sure to let people know that they can miss out any questions they want.

Tip 3: Use a range of question types

The **type of question** you use will affect the answers you get and what type of analysis is possible. Use mainly closed-ended / fixed response questions if you want to minimise the **time** you spend reading and analysing the response. Try to include a few open-ended questions where people answer in their own words to get more detail and flavour. The main types of questions are:



- **Questions with categories:** if you want to know the number or proportion of people who think something, you can use yes/no questions, multichoice questions where people can choose only one answer or lists of checkboxes where people can choose more than one answer.
- **Ranking questions:** ranking questions let you list a number of options and have participants rate them from highest to lowest or those that they like most and least. This is a good way of finding out what people like most and least at the same time, but only really works well when there are a small number of options e.g. five.
- **Questions using scales and numbers:** examples of questions that use continuous scales are ‘on a scale of 1 to 5’ or ‘Strongly Disagree’ to ‘Strongly Agree’ or ‘enter your age here’. These have the most analysis options. They allow you to calculate averages and test correlations. **1-5 or 1-7 scales** are usually easiest for people to answer and allow a spread of responses. Sometimes 0-10 scales are useful, especially where response numbers may be small and you want to be able to track any changes in response over time.
- If you have a number of questions with the same categories use a **matrix** or tabular layout to set out your questions. This has all the questions in rows with the response categories across the top of a column. This layout saves space and is quick for people to answer.

Tip 4: Make sure your survey flows

- Include a clear **title**. Using your Cochrane logo and colours can make the survey more welcoming.
- Have short **introductory text** setting out the purpose, how people’s feedback will be used and by whom. You might want to say something about protecting people’s data so they know you won’t pass it on to anyone else. Some regions have specific data protection laws.
- Estimate **how long** it will take participants to complete the survey. Base this on testing.
- **Guide** your participants through the survey using subheadings and clear question instructions.
- **Don’t ask too many questions.** As a general principle, the **shorter** the survey the more likely people are to complete the whole thing.
- Consider the **order** of your questions. Group them by topic. Start with general questions and then add more specific ones. It is usually best to place sensitive questions towards the end.
- Decide what type of **background information** you might want to know about participants, such as their professional role, sex or geographic region. Some people prefer to place these questions at the start of the survey as they are quick and easy to answer. Others prefer to put these at the end so more ‘important’ questions can be placed at the start.
- Make sure to have a **thank you** sentence at the end of your survey.
- If possible, let people know where they can see the **results**. For example, this could be by visiting a website for a summary after a certain date or emailing to put their name on a mailing list.
- Make sure your survey design is **mobile-friendly**.

Tip 5: Check for common pitfalls

- When you think your survey is ready, **set it aside for at least one day** and then look again to make sure you are happy with it.
- **Test** your survey before you launch it. Ask colleagues or friends to complete it and ask them whether everything was easy to understand and complete.
- Look at your **survey invitation** and the introductory text to make sure that this won't affect how people respond. If you tell people that the survey has a goal, they may try to 'help' by answering questions in a way that they think will achieve that goal. It is usually safe to say that your survey is a tool to improve your processes or content.
- **Format** your survey carefully. Online survey programs usually allow you to have a survey as one page that you scroll down or as multiple questions or pages that you click through. Usually it is quicker and less frustrating for participants to be able to scroll down one page. However, if your survey is a bit longer you might want to break it into multiple pages. That will make it less overwhelming to look at. Show a progress bar so people see when they're almost done.
- **Don't force** people to respond to every question using 'required' or forced choice rules. This can put people off. Sometimes people will just select a random answer if they are required to insert a response, and this can affect your findings.



Tip 6: Spend time on your invitations

- **Promote** your survey as widely as appropriate. You could use social media, email invitations and ask friends and colleagues to promote it for you.
- Think about whether there are other **Cochrane Groups** or your **Group's partners or stakeholders** who would be suitable to help you get your survey to the target audience.
- If your survey has a general audience Cochrane has a ['Survey Round-up'](#) page
- Spend time creating a short **introductory letter** or email and engaging subject line. Often people concentrate on their survey questions and then rush through their invitations. No matter how good your survey questions, if you don't attract people to participate it will be of limited use.
- Insert your **contact email** in case people have questions or concerns.
- Some survey programs let you **embed the first question** into an email. This can increase response.
- Consider sending a **reminder** to participate after a week or two.