

Video Two: Designing the Research

Page 1: Welcome

Hi everyone, welcome to Video 2 of our Six video series in the CSS Toolkit.

Funded by Community Sector Banking - 2019 Social Investment Grants Program and in partnership with the NSW Council of Social Service, Survey Matters produced this series of short educational videos to help NGOs understand best practice when conducting Customer Satisfaction Surveys.

Page 2 -Customer Satisfaction Survey Video Series

You will have seen this picture in the first video and it provides an overview of the video series. This second video, Designing the Research, will take you through the customer satisfaction survey design or planning process.

We will provide explain the difference between quantitative and qualitative research, as well as all the things you need to think about before starting your survey such as your objectives, your intended audience and how best to reach them.

Page 3: Overview of the Research Process

When you commence a research project, there are a series of steps that will be important for you to undertake. This slide gives you an overview of the complete survey research process. You will find that these align with the video series, with each video covering a different aspect of the process.

As you can see, the first step in your survey activity is to design the project. We will go through this in detail in this video. In following videos, we go through the next steps, questionnaire and survey design, fieldwork and data collection, analysis and data reporting.

Page 4: Designing the Research Activity

The first step in any customer satisfaction survey activity is survey design, and there are a number of design considerations before starting your customer satisfaction survey.

Define Your Survey Objectives

- The first step in any survey is to define the problem you are trying to solve and what you want to achieve. Many of your customer satisfaction survey design decisions are determined by your objectives. It is always really important to start with your objectives firmly in mind.

Select your Research Methodology

- Based on your objectives, you need to decide on your methodology, specifically whether it is more appropriate to use qualitative or quantitative research. If you need data and numbers to prove outcomes, then a quantitative survey might be best. However, if you are looking for feedback to tell a story or to create some case studies then a qualitative approach using interviews or focus groups might be better

Identify your Sample

- Next it is important that you give adequate thought to who is in your target audience, and how you are going to reach them.

- Choose your Research Approach

Finally, you will next need to decide if you are going to conduct your survey face to face, using an online survey, by sending out paper surveys or by contacting people to complete the survey over the telephone. All have benefits and disadvantages, which we will discuss.

Page 5 & 6: Define Your Objectives

As I just mentioned, survey design starts with defining your objectives - the first and most important step in your research.

- You research objectives clearly spell out what your research is trying to achieve.
- What questions do you want to answer? What are you trying to measure? How are you going to use the results?
- We always suggest using the S.M.A.R.T method when setting your objectives. SMART stands for Specific, Measurable, Achievable, Realistic and Time Specific
- For example, if your research objective is to understand the impact of your service on our clients' wellbeing it will be important that you:
 - identify the factors that indicate a state of wellbeing
 - measure the extent of their existence at a specific point in time and
 - test if and how these factors are impacted by the service your organisation provides

Page 7: Select your Methodology

Once you have defined your objectives, you are in a position to determine the best approach, or methodology, for your research.

Page 8 - There are Two Main Approaches

Qualitative or quantitative. While the two approaches are alternatives to each other, but you can use both in a project if required as both offer different benefits.

- **Qualitative research** uses either face to face, telephone or online discussions with groups or individuals to explore attitudes and opinions. These discussions ask general questions and encourages long form, open responses. It uses observations, verbal narratives and interpretation to build understanding of the topic.

While qualitative research is not designed to provide representativeness in any statistical sense, and findings cannot usually be generalised to the wider population, this method is often used to develop understanding of an issue.

In general, qualitative research is more informal and less structured. It is also more flexible and exploratory in nature, allowing for the researcher to evolve the focus of the questioning in response to the feedback provided.

- **Quantitative research** is a scientific research method that uses a structured set of questions to understand majority opinion about a subject and uses largely “closed” questions, where the participant is asked to select a response most closely aligned with their situation or opinion.

Quantitative research usually aims to test theories and establish facts and is often used to provide statistical, numerical evidence to support a position.

In general, quantitative studies use a specific, pre-planned and structured set of questions. As a result, it tends to be more formal than qualitative research.

Page 9: Pros and Cons of Each Research Method

So what are the advantages and disadvantages of each method?

The advantage of qualitative research is that it provides rich in-depth information which provides a more nuanced understanding than a quantitative survey. It is often used to explain the why factor for the topic under consideration.

- As I said, qualitative research is also more flexible and can be more easily adapted during the research as the interviewer responds to feedback provided by the participants. The interviewer can also pick up on face to face and non-verbal indicators that may not be evident in written responses.
- **The main disadvantage of qualitative research** is that it can be harder to generalize the findings to the wider population under consideration and results can usually only be relied upon as indicative, or suggestive, or wider views.

Consisting of written data, qualitative feedback can also be time consuming to analyse as interview or group recordings need to be transcribed, themed and summarized.

The advantage of quantitative research is that it generally takes less time, can gather larger amounts of information and is more cost effective.

- Quantitative research can also be used to provide statistical evidence, and given an adequate sample size, findings can be generalised to the wider population. The findings also usually have greater reliability and validity and can be compared across time, studies and groups.
- **The main disadvantage of a quantitative survey** is that it can lack the depth and richness of a qualitative study. Sometimes quantitative surveys miss the ‘story’ that a qualitative project can provide.

Page 10: How Do You Choose Which Method to Use?

So how do you choose which methodology to use. As I said earlier, while qualitative and quantitative research are alternatives, they can also be used to complement each other. Many studies use a combination of both, to get the best of both worlds. But often budget will prevent this, so you will have to make a choice.

Qualitative research

- Generally, you would use qualitative research to develop understanding of an issue, to explore feelings and ideas about a topic, to understand different perspectives between groups of people or to develop case studies or stories.
- For example, it can be used to develop a case study about the impact of a particular program on an individual, or group.

Quantitative research

- Conversely, quantitative research is used to provide data and statistical evidence. To understand majority opinion and provide evidence of outcomes. As a result, it is often used to form the basis of recommendations for particular services, activities, solutions or programs.
- For example, statistics can be used to prove the proportion of people in a group who have been positively impacted by participation in a program or activity.

Page 11: Identify Your Sample

The next thing you need to do, after you have decided if you are doing quantitative or qualitative research is, your sample. Your sample must reflect and enable you to achieve your objectives.

Page 12: Things to Consider When Choosing your Sample

So what are the things to consider?

- The first thing you need to look at is who you are trying to target?
- Then you need to consider if you can achieve a representative sample?
- And finally, how are you going to reach them?

Page 13: Who Are You Trying to Reach?

The first thing to consider is who are you trying to reach.

- This will depend on your research objectives and which group of people is able to provide the information or feedback that will answer your key research questions.
- For example, if the objective of your research is to understand the adequacy of your volunteer training, you will need to speak with anyone who has volunteered with your organisation over a defined time period. If you want to understand client satisfaction with your services, you will need to reach out to people who have used your service recently.

Page 14 – Aim for a Representative Sample

Finally, when choosing your sample you need to consider whether you will be able to obtain a sample that is representative of your target audience.

- **A representative sample** is one where the people who complete your survey have similar characteristics to the larger population.
- For example, if you are wanting to understand the views of your volunteers by age group, you need to ensure you have enough people in each age group to accurately reflect a 'real world' scenario. So, if your volunteer base is 25% under 30 years old, 50% aged between 30 and 60, and 25% aged over 60 you need to make sure your sample has a similar distribution.
- While we talk about sample composition in more detail in video four, it is important just to note here that making sure your sample is representative is not always possible.

Page 15: How Will You Reach Them?

The next consideration is how you are going to reach your target audience. The main choices are whether you will collect the survey data face to face, by distributing an online survey or by using a paper questionnaire.

Please note that if you have a list of contact details for your target audience you should first check that you have permission to use those contact details for research purposes.

- If you **do have permission** email or call your target audience directly to conduct the survey. Always make sure that any communications you send to participants advise that they can opt out of the research at any time. If they choose to opt out, you must unsubscribe them from your research database.
- If you **do not have permission** do not email them the survey under any circumstances.

Page 16: Choose Your Approach

Overall, however, while budget comes into play the choice that you make should depend on the target group you are trying to reach, their access to the different formats and how they are most likely to respond to the survey.

Page 17

Overall, your approach will depend on your research objectives, budget and your target audience.

However, it probably also a good idea to understand the pros and cons of each method before you make a final decision.

Page 18: Format Options for Quantitative Surveys

As I said, there are four main options to reach your target audience:

- Face to face intercept surveys
- Online surveys, distributed via mail or social media
- Paper surveys, often distributed by mail
- Telephone surveys

To help you make an informed decision, we will go through each of these in order and give you an run down of the advantages and disadvantages of each method.

Page 19: Face to Face Intercept Surveys

Face to face surveys can be conducted as intercept surveys, where you stop someone in a public place and ask them to complete your survey, or by making an appointment to assist someone to complete the survey.

If you have the resources to conduct a face to face survey, there are some benefits.

- If you are approaching people to participate in the survey, you are able to ensure you are talking to the right people and that the respondent is focussed on the questions they are answering.
- The interviewer is also able to capture the verbal and non-verbal cues from respondents which can enhance understanding of the feelings towards the topic under consideration.
- And of course, face to face may be the only way reach some groups. For example, unknown attendees to a large -scale community event or people with no fixed address.

There are, however, some things to be aware of with face to face surveys.

- Firstly, there is the cost. It is much more expensive to conduct surveys face to face, as you may need several interviewers to collect enough data.
- Secondly, unless you collect the data digitally, by using IPADs for example, any surveys you collect need to be collated so you will have manual data entry to calculate your results.
- Finally, the quality of the data can be dependent on interviewer. It is therefore very important that interviewers receive adequate training, to ensure they do not lead participants or influence responses in any other way.

Page 20: Online Survey

Online surveys are those programmed in survey software, for respondents to access online. They are usually distributed via email if you have direct contact details, or embedded in organisational newsletters or via social media if you are trying to reach a wider, or unknown audience.

Online surveys are widely used for a number of reasons.

- The most obvious of these is time and cost. An online survey can be distributed relatively quickly and at low cost. As a result, it allows you to reach a larger group of people.
- Results can generally be analysed immediately, with data collected compiled automatically by the software.
- Online surveys can also be completed at a time that suits participants, and they can take their time and think about their answers.

Many of the disadvantages of online surveys are largely technical.

- Sometimes your survey invitation does not reach its intended recipient if, for example, your email is caught by spam filters.
- There can also be technical glitches with the software that prevents people from entering their data.
- Online surveys are obviously not suitable if a large part of your target audience do not have internet access.

Page 21: Paper / Mail Surveys

Paper surveys can be often be the most convenient, or sometimes the only option.

- Paper surveys are usually either mailed out to participants or completed on-site, for example after taking a training course, attending an event or at a reception or other shared area.
- They provide access for respondents without internet access and can also be used if you don't have email addresses for your target audience.

There are, however, some things to consider if using paper surveys.

- Administering paper surveys can be expensive and slow. Paper surveys need to be designed to ensure the layout is clear and easy to complete. You might need a graphic designer. And if the surveys are being distributed by post, the costs can mount up.
- Returned surveys need to be compiled and entered into survey software.
- Data quality can also be an issue, as respondents can skip questions. Sometimes people don't read!

Page 22: Telephone Surveys

Another way to reach people if you don't have email addresses, or if you are trying to reach a population with limited internet access, is via telephone.

- **Telephone surveys** allow are convenient and provide a way to reach a large number of both known, or unknown, participants. They also provide a way to reach a random sample of respondents.

Surveys conducted by phone, can also improve data quality as they allow the person conducting the telephone survey to provide explanations to respondents who do not understand the question. There is therefore less likelihood that respondents will 'guess' at what the question means, potentially provided incorrect responses.

Conversely, telephone surveys do have some limitations. Like with face to face surveys it is important that interviewers receive adequate training, to ensure they do not lead participants or influence responses in any other way. This is particularly so as telephone surveys usually have time limits and need to be completed in a set amount of time.

Telephone surveys can also have issues with reaching respondents, as there will always be people who screen calls and / or hang up.

Page 23– Conclusion, and Next Videos

So that concludes our video on survey design considerations, which hopefully gave you some idea of the things that you will need to consider and learn about as you plan your survey.

As I said, there are six videos that provide more information about questionnaire design and programming, fieldwork and data collection, analysis and reporting, privacy and ethics. The next video in the series goes into detail about questionnaire design and programming.

Page 24: Questions: Get in Touch

If you have any questions, we are also available by phone or email. So feel free to reach out to us at any time.

Thanks for watching!