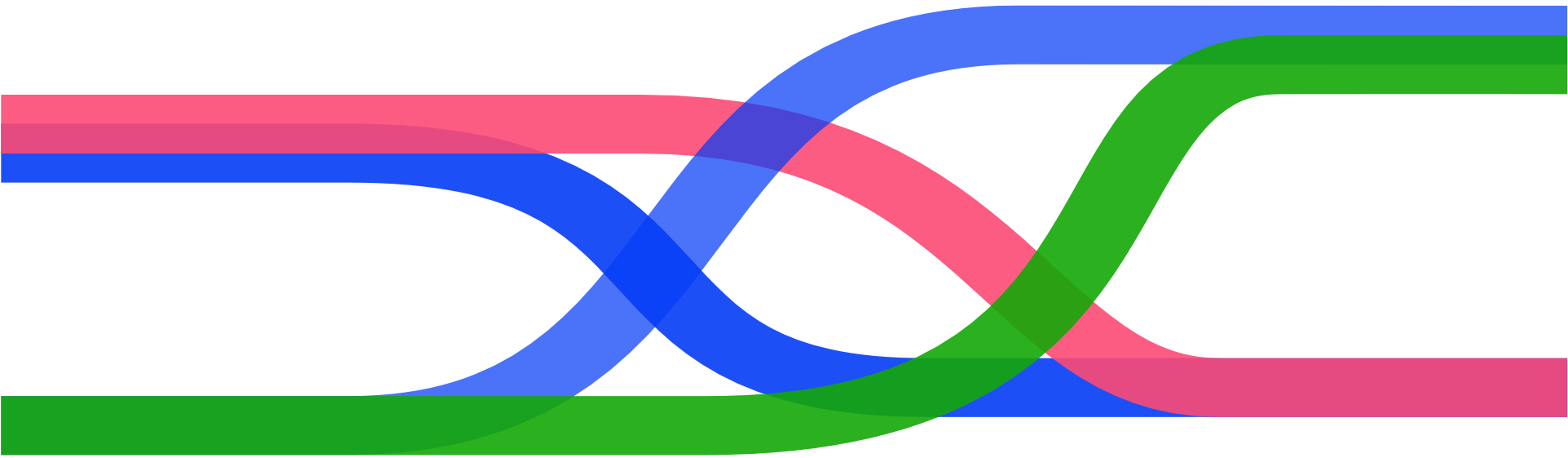


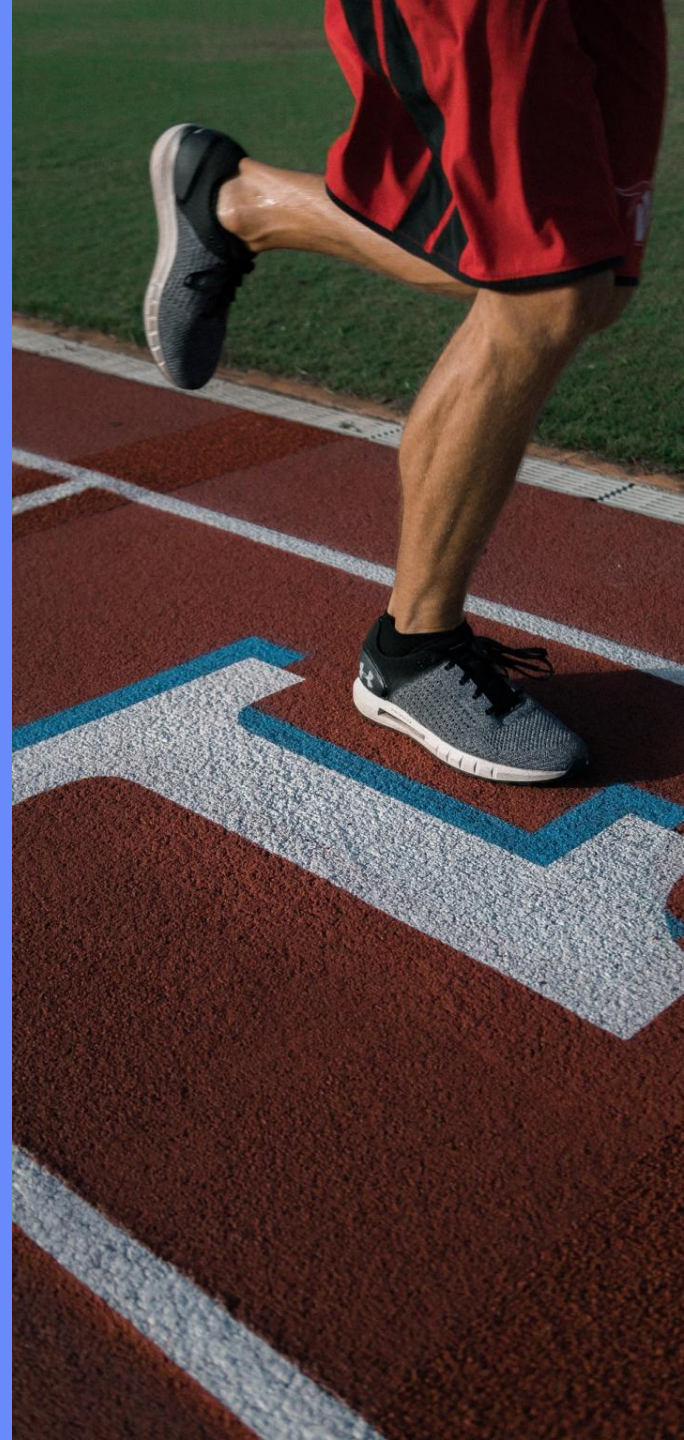


Survey Scripting Practices in Market Research

22 July 2025: A guide to optimise survey question and flow design

CONFIDENTIAL

Overview

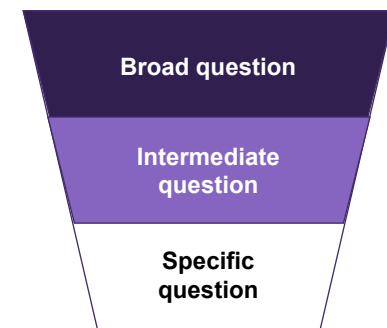


Establishing logical order, grouping related topics, using the funnel approach

OVERVIEW

GENERAL PRACTICES

- Start with engaging, simple questions to build rapport and ease into the study
 - Our screening questions can also act as warm-in questions for better data quality further into the survey
- Place demographic questions strategically
 - Beginning → demographics used for screening
 - End → anything not used for screening to avoid contributing to survey fatigue early on
- Avoid sensitive questions at the beginning to prevent early dropout
 - Place income questions at the end if not used for qualification purposes
- Group related topics, use the funnel approach within topics
- Test questions on yourself first for **readability**, **ease of comprehension**, and **ability to recall the information**
 - Or better yet, share your survey link with colleagues along with a heads-up on what to look for
 - If you struggle to understand a sentence, don't know exactly what a word means, or the terms used seem too technical; **respondents will struggle too**
 - > ❌ "To what extent do you find the product's tactile interface conducive to your usage patterns?"
 - > ✅ "How do you feel about the product's touch controls?"
- Use the soft launch as a **pilot test** for difficult questions



Funnel approach

Provide memory aids for ease of recall

OVERVIEW

COMPREHENSION & RECALL

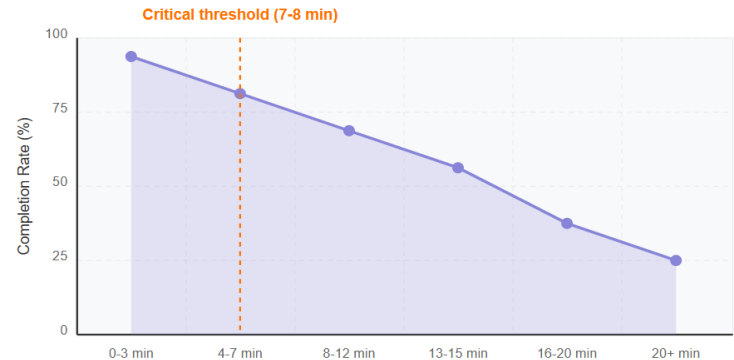
- Anchor timelines! Time is better perceived based on **temporal landmarks** (cultural, seasonal, etc.)
 - **Bad:** “How often did you use the product in Q1?”
 - Meh: “How often did you use the product between January and March 2025?”
 - **Good:** “How often did you use the product this past winter (Jan-Mar 2025)?”
- Prepare respondents for recalling information
 - By dividing into sections: “The next section will ask about your recent purchases”
 - By providing context: “Think(ing) about your purchases in the past six months...”
 - By providing memory aids: “Below is a list of cleaning products commonly used in restaurants. Do you purchase any of these for your establishment?”
- Use specific time frames instead of vague time quantifiers. The definition of *rarely* will depend on the individual perception of time, lifestyle, etc.
 - “How often do you exercise?”
 - > **Bad:**
 - Rarely
 - Sometimes
 - Often
 - Very often
 - > **Good:**
 - Never
 - 1-2 times per month
 - 1-2 times per week
 - 3 or more times per week
 - Every day

Keep surveys short to avoid fatigue and increase data quality

OVERVIEW

SURVEY LENGTH

- The ideal maximum survey length has a median of **10 minutes**
- The maximum recommended length is **20 minutes**
 - Some precautions are necessary to maintain data quality for 20-minute surveys
 - Abandonment rates increase substantially after 7 mins



Example survey planning by length

Short survey (5-7 min)

- ✓ Single topic focus
- ✓ 15-20 questions max
- ✓ Can include complex question types (e.g., recall, several grids)

Standard survey (8-12 min)

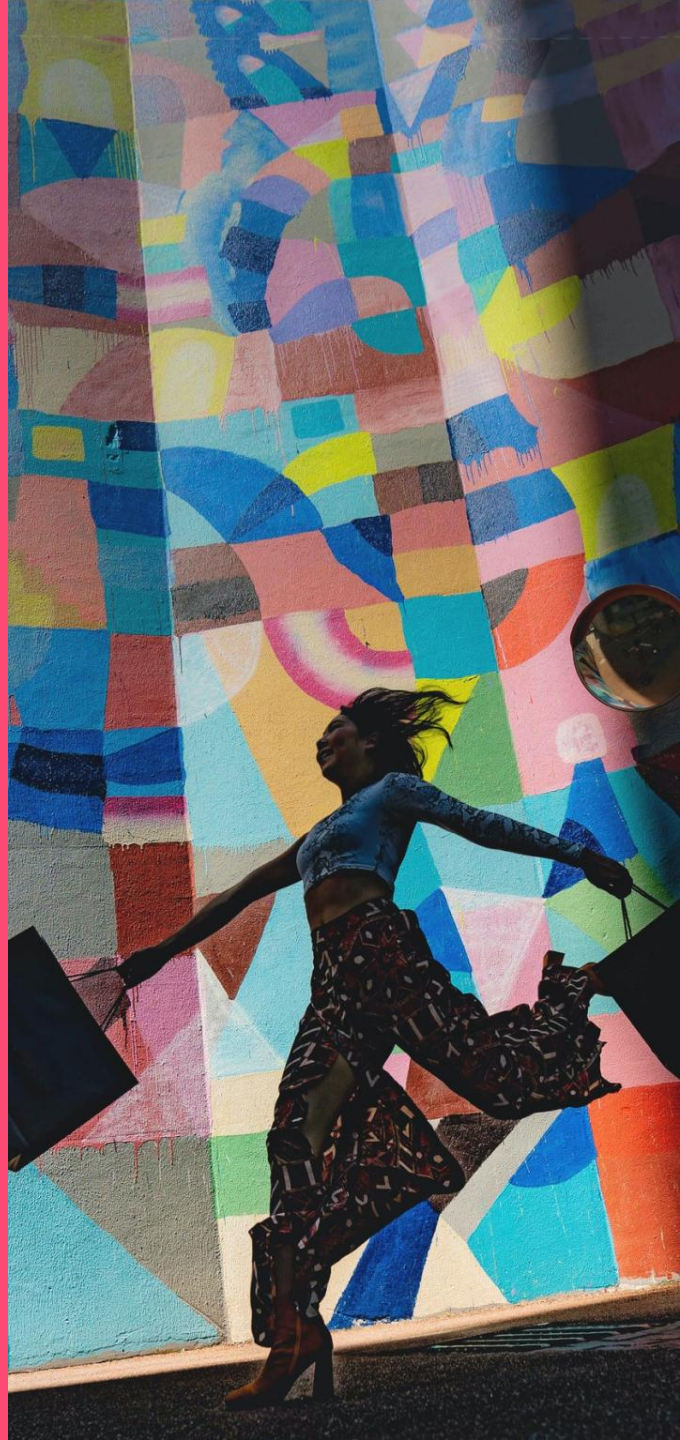
- ✓ 1-2 related topics
- ✓ 20-30 questions
- ✓ Mix of simple and complex questions

Long survey (13-20 min)

- ✓ Consider splitting into multiple surveys (sections if not possible)
- ✓ Require stronger incentives
- ✓ Needs engaging design

- Place important questions before the 7-min mark
 - First 1-3 min: Screening and warm-up
 - 3-7: Critical research questions
 - 7+: Secondary questions, demographics, nice-to-have insights

Question types



Good practices for asking questions

QUESTION TYPES

GOOD PRACTICES

- Remember that we are typically limited to holding and processing ~ 7 (± 2) items in working memory at once
 - For **Likert scales**, **Matrix grids**, **Multiple choice questions**:
 - > Optimal number of alternatives is 7
 - > Efficiency decreases significantly at 11 alternatives
 - We might think that adding more categories or broadening the scale will contribute to the granularity of the data — but this might end up overloading the working memory, leading to low data quality
- Avoid negation: processing is difficult and highly dependent on crosslinguistic factors
- Clearly communicate the scale, the grounds for evaluation, and the product/concept/SKU of interest
 - Do not rely on recall or indexicals (“us”, “our product”)
- Make sure that the respondent is informed of the stimulus in some capacity
 - They should have either (i) used the product, (ii) are familiar with the product, (iii) you have given enough information in the experiment that enables the respondent to judge the product
 - If experiencing the product is not necessary to answer the questions (e.g., concept tests, rating the design), clearly state that they should answer based on the information provided in the survey
- For pricing studies, include a price knowledge question for current users
 - Helps understand price sensitivity and useful for data quality

Net Promoter Score (NPS)

QUESTION TYPES

NET PROMOTER SCORE

Standard practices

- ✓ On the scale of 0-10
- ✓ Clearly stated question
 - “On a scale of 0 to 10, how likely are you to recommend [product / service / concept]?”
 - State the product clearly in the question text, avoid relying on recall or using indexical such as “us” or “our product”
- ✓ Clearly stated scale with labelled extremes
 - “Extremely likely” to “not at all likely”
- ✓ Three groups of respondents (this grouping might depend on the researcher or the study):
 - Detractors: 0-6
 - Passives: 7-8
 - Promoters: 9-10

Recommended practices

- Include an **open-ended** question to probe into the respondent's NPS rating
 - “Why did you rate this [product / service / concept] a 6 out of 10?”
- Keep the survey short to prevent survey fatigue, don't include more than three questions for each brand.

Fallouts

- NPS is argued to be a poor measure of loyalty
 - Low predictability: fails to correlate with other metrics
 - It is argued that repurchase is a better indicator
- The lack of a no-answer option
- The standard grouping does not form statistically homogeneous groups and can also vastly differ across cultural settings

Likert scale questions

QUESTION TYPES

LIKERT SCALE

Standard practices

- ✓ 5-7 points
 - The optimal length was found to be 7, which maximises validity and reliability
- ✓ Scale points should be clearly labelled with appropriate anchors
 - Ideally all points should be anchored
- ✓ The scale length can depend on what the research goals are
 - Longer scales will provide better discrimination power
 - Shorter scales will decrease cognitive fatigue
 - Even-numbered scales will force respondents to lean a certain way by removing the centre option
 - Odd-numbered scales allow for neutrality but increase the bias for central tendency

Recommended practices

- 5-, 7-, and 10-point scales are easiest for respondents
- For maximum discriminating power, use 6+ response categories
- For non-Western respondents, supplement scales with:
 - Anchoring (providing standardised examples as reference points; e.g., “1 means I regret purchasing this product and would not buy it again”)
 - Quantifying responses directly (e.g., “3 means I feel this way a few days a year”)
 - Collecting additional qualitative responses
- For Chinese respondents specifically, consider 4-point scales as this would increase construct validity

Fallouts

- Respondents take significantly longer to select the middle category, suggesting higher cognitive load
- Less clear items lead to increased middle category endorsement, potentially skewing results
- Many non-Western respondents find the ordinal scaling structure unfamiliar
- Scale length decisions affect multiple aspects of research quality simultaneously (validity, reliability, respondent burden, etc.), difficult to optimise for all factors

Matrix grids

QUESTION TYPES

MATRIX GRIDS

Standard practices

- ✓ 5-7 items per row and column each
- ✓ Clear row and column labels
- ✓ Randomised item order (if not ordered list)
- ✓ Use to ask about similar items on the same scale
- ✓ Useful for comparisons, offering a visual ground for contrasting different concepts

Recommended practices

- Scale direction should remain consistent
- Use straightforward, predictable wording; avoid using negative items with positive statements in the same grid
 - Example of **reverse-wording**:
 1. The customer service team was helpful.
 2. The product met my expectations.
 3. **The website was difficult to navigate.**
 4. I would recommend this company to others.
 5. **The pricing was unclear.**
- Apply when survey length is a significant concern
- Ensure mobile compatibility, test on multiple devices
- Avoid in critical questions requiring maximum attention

Fallouts

- Increased behaviours such as straightlining or patterned responses, with respondents being more likely to choose the same option for multiple stimuli
- They perform poorly on smartphones
- Might increase cognitive burden despite their visual efficiency, as respondents must continuously reference both row and column information
- Can be confusing for respondents with lower digital literacy

Multiple-choice questions

QUESTION TYPES

MULTIPLE-CHOICE

Standard practices

- ✓ Each question should have a specific objective, clearly stated in the question text
- ✓ All necessary information needed to answer the question should be included, anything not directly needed should be avoided
- ✓ Relevant, to-the-point, and precise, mutually-exclusive alternatives. Avoid ambiguity
- ✓ Alternatives of the same type (e.g., brands, products, reasons)
- ✓ Randomise alternatives, unless ordered

Recommended practices

- Use distractor alternatives
 - Fake brands, implausible reasons, non-existent products etc. will be helpful to weed out careless responses.
- An optimal MCQ should ideally contain 5-7 alternatives, efficiency decreases after 11 alternatives
- Use proper grammar and accessible language. Avoid using “big words”
- Almost always include “No answer” and “other” options
 - People will choose randomly if no option can accommodate their lack of position, usage, etc. → low quality data!
- Avoid using negative items in the question text
 - “Which of these brands would you be least likely to buy?”

Fallouts

- Satisficing behaviour is commonly used to conserve cognitive effort
- The depth of insight is limited for this question type
- Forced choice that mismatches real-life scenarios
- Random selection can limit the possibility of a researcher determining whether the respondent gives meaningful answers

When MCQs fail: Satisficing behaviour

QUESTION TYPES

SATISFICING BEHAVIOUR

What is satisficing behaviour?

Respondents might select things in MCQs not because they considered all options and thought the selected ones apply to them, but because **the options met an acceptable threshold**.

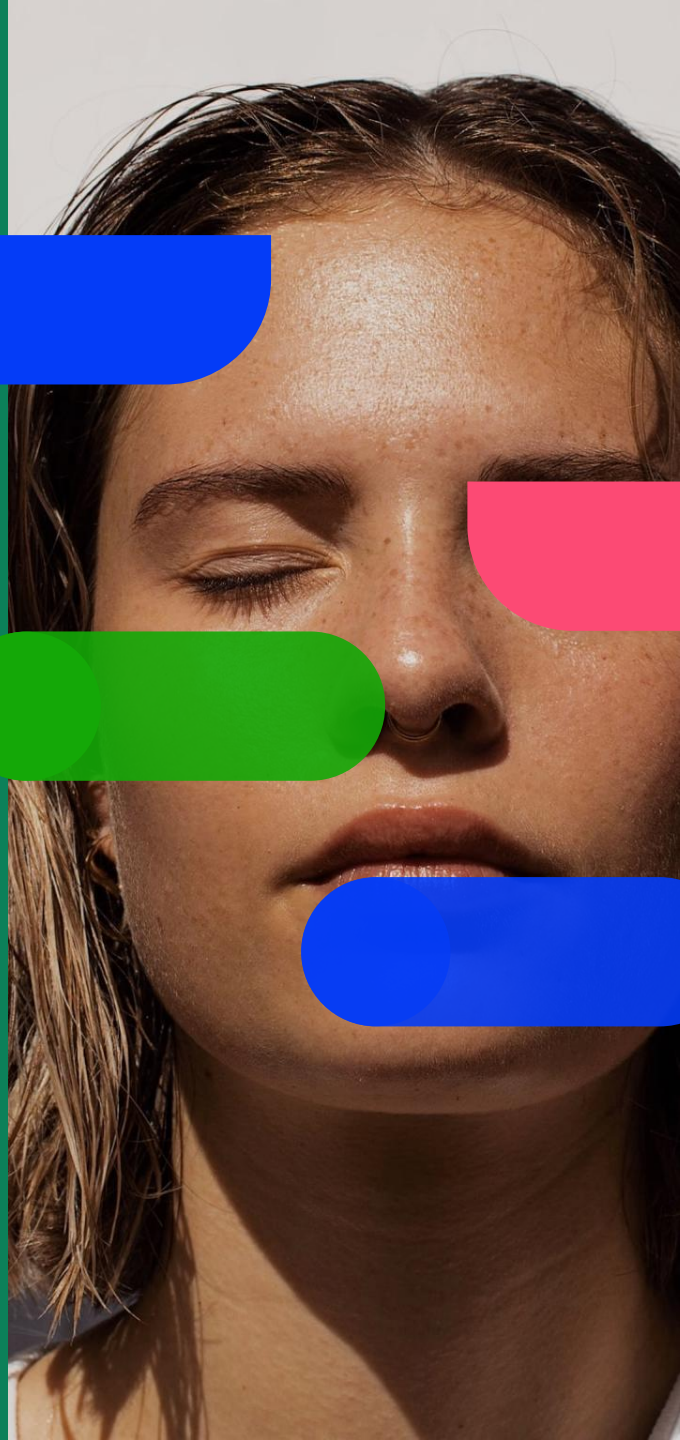
Respondents might:

- skip items entirely if allowed
- choose the first reasonable, “close enough” option rather than considering all options listed
- select middle response options to avoid extreme positions
- agree with statements regardless of content (known as the acquiescence bias, or “yea-saying”, leading to a disproportionate number of positive responses)
- respond randomly

Recommended practices

- Conserve the cognitive burden for the respondents.
 - keep question texts and response options clear, concise, and straightforward
- Vary question formats to maintain engagement with the experiment
- Include dummy options in multiple-choice questions (e.g., fake brand names, non-existing products, nonsensical reasons)
- Keep surveys short and as easy and low-effort as possible

Sensitive questions



Sensitive questions entails three different dimensions: Intrusiveness, threat of disclosure, and social desirability

SENSITIVE QUESTIONS		SENSITIVITY DIMENSION
Intrusiveness		Threat of disclosure
Questions that touch on topics typically considered inappropriate for everyday conversations and are viewed as invasions of privacy, regardless of the respondent's actual answer.		Concerns about the possible consequences of giving a truthful answer should the information become known to a third party.
Sensitivity stems from the question		Sensitivity stems from the question
<i>Income</i> <i>Religion</i>		<i>Teenagers' use of marijuana</i> <i>Tax fraud</i>
		Sensitivity stems from the answer
		<i>Frequency of exercise</i> <i>Sustainability behaviours</i>
Response error		

Gender and sex are two different concepts and thus shouldn't be conflated with each other

SENSITIVE QUESTIONS

GENDER

Sex



is usually assigned and registered **at birth** based on primary sex characteristics (genitalia) and **reproductive functions**.

Gender



often expressed in terms of masculinity and femininity, is largely **culturally determined** and reflects a person's **internal sense** of identity.

Notes

- Poorly designed gender questions can lead to potential dropouts and degrade data quality
 - Misclassification of gender identities may cause confusion
 - Binary-only options can alienate non-binary/gender non-confirming respondents, leading to distrust or potential participant dropouts
- Allowing multiple gender identity selections can:
 - improve inclusivity
 - but introduce significant challenges for data check, coding and analysis

Gender questions

SENSITIVE QUESTIONS

GENDER

Standard practices

- ✓ Use clear, respectful language
 - “How do you identify your gender?”
 - “What is your gender (identity)?”
- ✗ Do not conflate sex and gender or use them both in the same question
 - “What is your gender/sex?”
 - “What is your gender or sex?”
- ✓ Include options beyond binary male/female
- ✓ Order answer options alphabetically/randomly to avoid bias
- ✓ Placement in survey flow
 - At the beginning: for screening needs
 - At the end: prevent biases that might influence responses to the main questions

Recommended practices

- When it’s necessary to get the full picture, include a write-in option
 - “Other, please specify”
- Include a "Prefer not to say" option to respect privacy
- Adapt terminology for regional/cultural context
 - "Hijra" in South Asian surveys

Example question

What is your gender?

- Female
- Male
- Other
- Prefer not to say

(Answer options ordered alphabetically/randomly)

Income questions are highly sensitive and prone to response error due to privacy concerns and social desirability bias

SENSITIVE QUESTIONS

INCOME

Standard practices

- ✓ Use **income ranges or brackets** to reduce survey sensitivity and non-response
 - Non-overlapping and exhaustive (cover all potential income levels)
 - Start from zero to avoid presumptions about minimum income
- ✗ Don't ask for exact figures of income (can be intrusive, cause lower response rates or inaccurate answers)
- ✓ Provides **context** for accurate data collection by explicitly specifying:
 - Individual vs. household income
 - Pre-tax vs. post-tax income
 - Annual vs. monthly income reporting
 - Provides critical context for accurate data interpretation
- ✓ Localise currency (e.g., USD, EUR)
- ✓ Placement in survey flow
 - Position income questions later in the survey (preferably toward the end) to minimise discomfort and dropout

Recommended practices

- Update income ranges regularly (e.g., annually) to account for inflation, especially for high-inflation countries (e.g., Argentina, Turkey)
- Wage reporting might change from country to country (e.g., Turkey's statistics institute reports monthly wage)
- Define income ranges based on each country's income distribution
 - median income, quartiles/deciles from government statistics or World Bank data
- In **Middle Eastern** and **Asian contexts**, income is usually evaluated based on the **household** rather than the individual
- Include a "Prefer not to answer" option to give respondents the autonomy to opt out of the question rather than drop out the whole survey

Concepts of race and ethnicity evolve as complex social constructs rather than simple biological realities

SENSITIVE QUESTIONS

RACE & ETHNICITY

Race was associated with physical/biological characteristics (skin colour, facial features, etc.) and presumed to have genetic basis

Ethnicity was more commonly associated with cultural identity, heritage, language, customs, and social groupings



Both race and ethnicity are now understood primarily as **social constructs** rather than biological realities

The American Anthropological Association (1998) explicitly rejects racial categories as biologically meaningful and emphasises cultural factors.

Notes

- As racial and ethnic diversity grows, it is important to prioritise respondents' **autonomy**.
- Poorly designed questions can lead to potential dropouts and inaccurate data
 - Outdated or limited race/ethnicity categorisation schemes can alienate respondents
 - Forcing respondents to select a single category when they identify with multiple groups creates frustration and data inaccuracy
 - Using outdated or offensive terms can decrease completion rates and damage research credibility
 - Attention to cross-country design: Categories appropriate in one cultural context may be meaningless or inappropriate in others

Race / ethnicity questions

SENSITIVE QUESTIONS

RACE & ETHNICITY

Standard practices

- ✓ Carefully consider **whether collecting this data is essential to your research goals**
- ✓ Stay relevant to and inclusive of the racial identities of the market of interest.
- ✓ Questions should allow for **flexible self-identification** through:
 - multiple selection options
 - “other” option with a text field for self-identification
 - open-ended responses
- ✓ Categories must reflect the cultural and demographic context of your target respondents.
- ✓ Placement in survey flow
 - Placed in the middle or latter part of the demographic section

Recommended practices

- Use locally relevant categories
 - Racial/Ethnic categories vary significantly by country
- Open-ended questions can capture more nuanced identities but creates categorisation challenges
- Use current, culturally appropriate terminology
 - Hispanic or Latino
 - Native American or First Nations

Example question (U.S. Census Bureau, 2025)

What is your race and/or ethnicity?

Select all that apply.

- American Indian or Alaska Native
- Asian
- Black or African American
- Hispanic or Latino
- Middle Eastern or North African
- Native Hawaiian or Pacific Islander
- White
- Other: _____ (text input)

(Answer options ordered alphabetically or by population size)

Respondents tend to show social desirability biases in religion questions by overreporting their attendance or beliefs

SENSITIVE QUESTIONS

RELIGION

Standard practices

- ✓ Be clear about why this information is relevant and being collected, as well as how it will be used and that it will stay anonymous
- ✗ Avoid asking “what is your religion” as this would presume that the respondent has one
- ✓ Use neutral language.
 - ✗ “Do you identify with Christianity?”
 - ✓ “What religion, if any, do you identify with?”
- ✓ Make sure to not conflate the cultural identity and religious practices
- ✓ For answer options:
 - Use broad categories but also make sure to include options for smaller groups.
 - Always include a “Prefer not to say” option.
 - ✗ Avoid excessively detailed religious categories
- ✗ Do not use the phrase “religious preference” as the origin of religious practice can be subject to debate
- ✓ Placement in survey flow
 - Placed toward the end of the demographic section

Recommended practices

- If not necessary, avoid asking religion in detail.
 - If all you need to know is whether they identify with a/any religion rather than what religion they identify with, keep the options broad
- Sample alternative set:
 - Major religions (Christianity, Islam, Judaism, Hinduism, Buddhism, etc.)
 - Other religion (write-in)
 - Spiritual but not religious
 - Agnostic
 - Atheist
 - No religion
 - Prefer not to answer
- For broad categories, consider adding details about what denominations would count into the broad category

Medical questions

SENSITIVE QUESTIONS

MEDICAL QUESTIONS

Standard practices

- ✓ Use simple, clear language comprehensible to the respondents, avoid using overly complex, medical vernacular
- ✓ Consider using visual aids for body parts or pain scales if applicable
- ✓ Clearly explain data use and storage, comply with local government regulations, obtain explicit consent
- ✓ Placement in survey flow
 - In the middle of the survey rather than beginning or end

Recommended practices

- **Ethics and informed consent:**
 - Make sure that the respondent is fully informed of the purpose and confidentiality of the study
 - Give explicit details about the use of the data provided by the respondent before they agree to participate
- **Reduce harm, increase benefit:**
 - Make sure that the benefit of the participation in the survey outweighs the harm. Asking medical questions (life threatening or difficult topics) can bring forth memories or emotions that are hard to handle
- **Rights of confidentiality:**
 - Consider the rights of the respondent in their country of residence. Countries may have specific guidelines on how to handle medical information beyond data privacy
- **Different cultures** may have different boundaries on what medical information you can gather
 - Be aware of community stigmas around specific medical conditions
 - Consider alternative approach (indirect questioning)
 - Avoid direct cross-cultural health comparisons without accounting for cultural patterns

Social desirability

SOCIAL DESIRABILITY

Respondents often **over-report "good behaviours"** (e.g., recycling) and **underreport "bad" ones** (e.g., smoking) to align with societal expectations.

This distortion can occur both consciously and subconsciously.



Fallouts

- Online surveys are less susceptible to SDB due to anonymity. Still, **question wording** and **question context** can be optimised to minimise SDB.
- SDB can significantly **skew insights for market research**, for example:
 - **Sustainability:** Respondents may claim to buy eco-friendly products more often than they actually do, leading businesses to overestimate demand for green initiatives and potentially misallocate resources toward sustainability efforts that won't generate expected returns.
 - **Smoking/Drinking:** Underreporting of frequency can mislead companies about the true market size for cessation programs, low-alcohol beverages, or health-focused products, resulting in flawed market entry strategies.

Social desirability: standard and recommended practices

SENSITIVE QUESTIONS

SOCIAL DESIRABILITY

Standard practices

✗ Avoid direct self-assessment

- ✗ “Do you act sustainably?”
- ✓ “Which of these actions have you taken in the past month?”
 - I recycled electronics
 - I used reusable bags

✓ Use neutral, non-judgmental wording to neutralise/normalise all potential responses

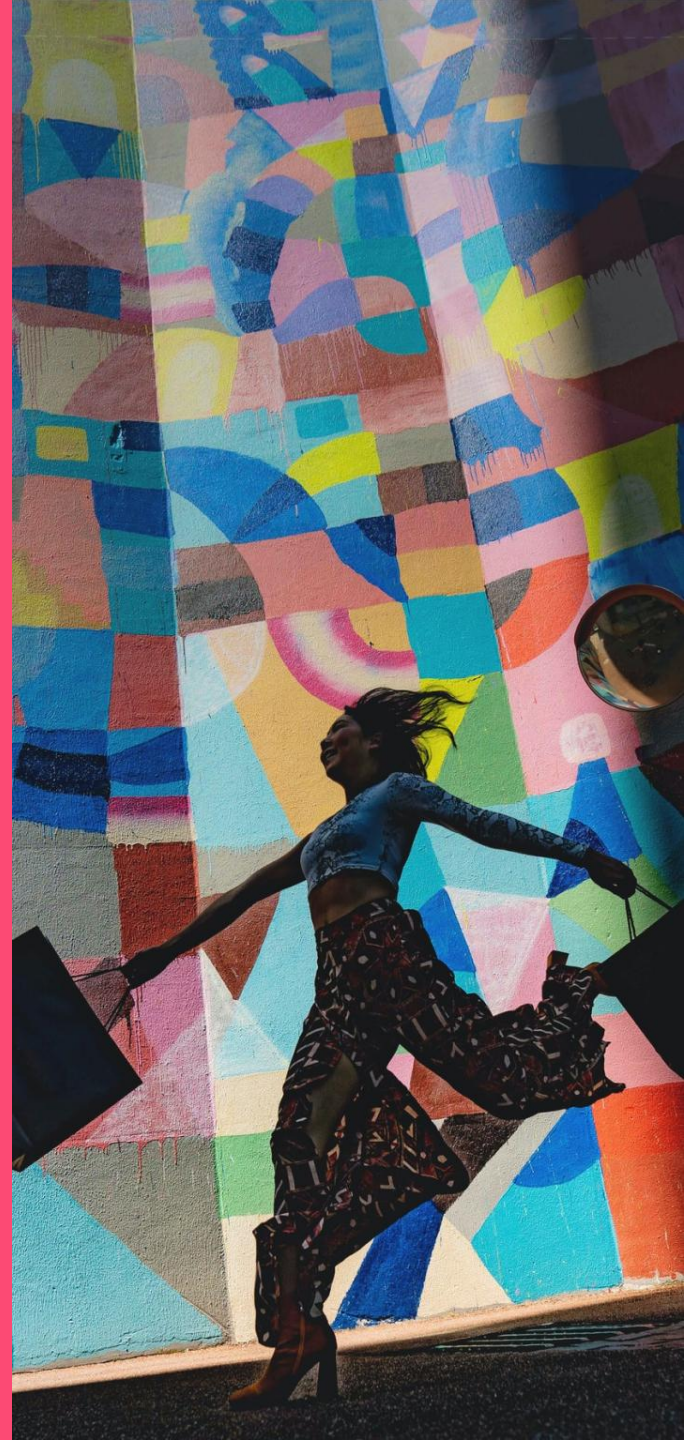
- For example, use phrasing like: “Many people...”
- Use phrasing like: “Some people smoke occasionally, others don’t. How often do you smoke?” to reduce perceived judgment

✓ Avoid loaded terms that suggest “right” answers

Recommended practices

- Carefully embedding the sensitive question in a **constructed context** to lower the respondent’s feelings of jeopardy
 - Embedding the question in a series of questions starting with unoffending, general questions connected to the topic of interest, and then gradually narrowing the focus to more specific behaviours
- Consider **indirect questioning techniques** for sensitive topics.
 - Asks respondents to make predictions about how a similar other would think or act in a particular situation. But in some situations, indirect questions may introduce other forms of error
 - “How common do you think it is for people in your community to buy bio products?”

User experience



User experience

USER EXPERIENCE

ACCESSIBILITY & MOBILE COMPATIBILITY

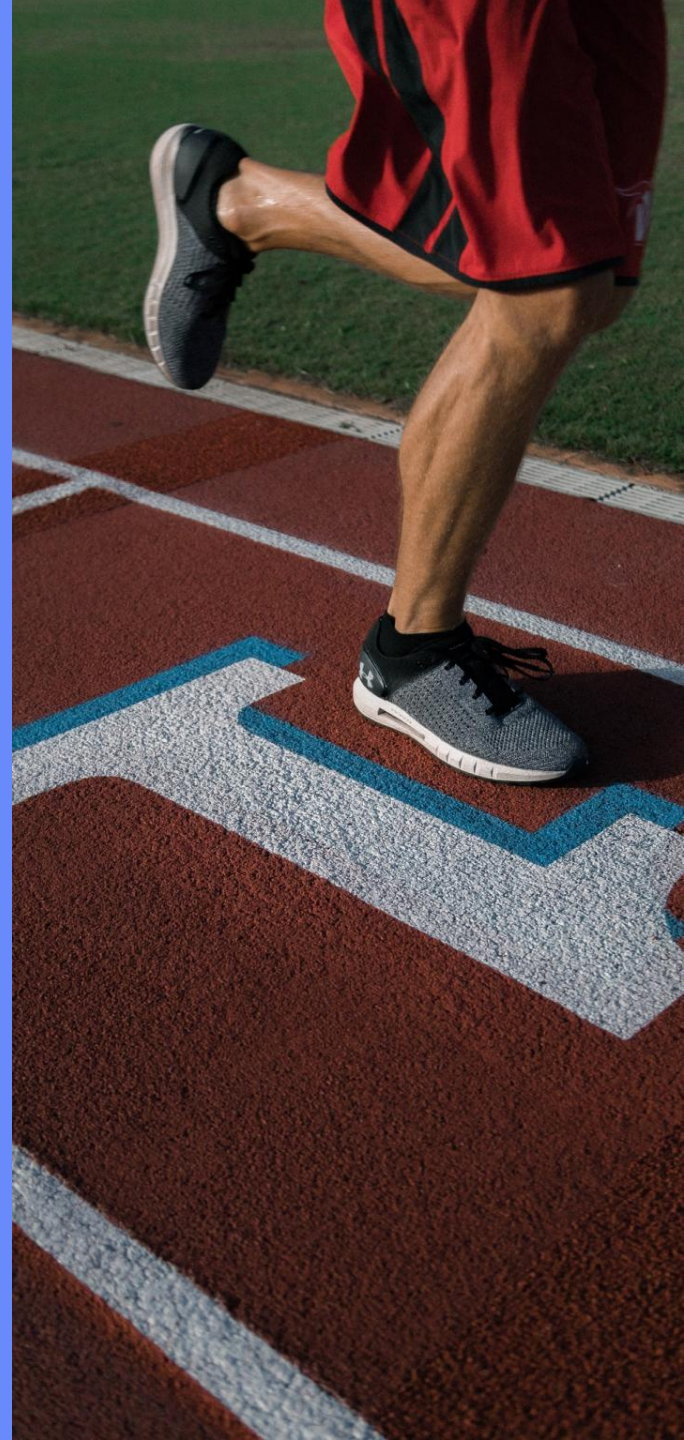
Accessibility

- Establish clear information hierarchy
 - e.g. **Title** vs. Content
- Sans-serif fonts are easier to read and more accessible
- Avoid all caps as it reduces reading speed / comprehension
- Don't rely on **colour only** to differentiate text
 - It can help comprehension, but it should not be the only mode of differentiation
 - If you are using colour, test your design by using a [colour blindness simulator](#)
- Support resizing, try to have image zoom enabled for all images included in the survey
- Be descriptive on error messages. Clearly state what needs to be fixed, and where
- Make sure all text is accessible via screen readers
- Try to use what has been tested and tried
 - If you are using a new question type, make sure to clearly communicate how it works and offer examples.
 - Consider [cultural differences](#) when choosing question types and scales for the markets of interest
- Include progress bars

Mobile compatibility

- Conserve the cognitive burden for the respondents.
 - keep question texts and response options clear, concise, and straightforward
- Vary question formats to maintain engagement with the experiment
- Include dummy options in multiple-choice questions (e.g., fake brand names, non-existing products, nonsensical reasons)
- Keep surveys short and as easy and low-effort as possible

References



Further reading

REFERENCES

FURTHER READING

1. Brace, I., & Bolton, K. (2022). *Questionnaire Design: How to plan, structure and write survey material for effective market research* (Fifth edition). KoganPage.

- It provides practical guidelines for planning, structuring, and composing questionnaires in the field of market research.
- It covers multiple aspects of survey design, from crafting question text and answer options to exploring different questionnaire types, addressing ethical issues, and designing questionnaires for multi-country surveys.
- It contains case studies that help readers apply theoretical knowledge to real-world scenarios.
- For an easy start, it systematically guides you through the entire survey design process (from planning to piloting) while also introducing basic statistical concepts necessary for effective research.

2. Bradburn, N. M., Sudman, S., & Wansink, B. (2004). *Asking Questions: The definitive guide to questionnaire design--for market research, political polls, and social and health questionnaires*. John Wiley & Sons.

3. Breakwell, G. M., Barnett, J., & Wright, D. B. (2020). *Research Methods in Psychology*.

- Focuses on research methods (both qualitative and quantitative) rather than solely on survey design.
- Covers a wide range of methodologies, from designing experiments to conducting various types of interviews.
- Includes multiple aspects of the research process, such as study design, data collection techniques, and data analysis methods (e.g., content analysis and statistical approaches).

4. Robinson, S. B., & Leonard, K. F. (2024). *Designing Quality Survey Questions*. Sage.

- Topics are up-to-date and quite relevant for market research.
- Covers the entire survey design process and addresses multiple aspects (such as avoiding survey fatigue, managing social desirability bias, etc.) with a clear structure and easy-to-understand language.
- Includes up-to-date topics and addresses modern challenges, such as appropriate language preferences for sensitive questions (gender, income) and survey design considerations for respondents with low vision or blindness.
- Uses real-world examples/stories of poorly constructed questions and inadequate response options/scales from actual surveys, demonstrating common pitfalls to avoid.
- Includes a Checklist for Quality Question Design as a practical tool.

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