Don Dillman's* Guiding Principles for Mail and Internet Surveys

Dillman, D., Smyth, J. & Christian, L. (2009). *Internet, Mail, and Mixed-Mode Surveys: The Tailored Design Method*, New York: Wiley.

Mail and Internet Surveys

1. Write each question in a way that minimizes the need to reread portions in order to comprehend to response task.

2. Place instructions exactly where the information is needed and not at the beginning of the questionnaire.

3. Place items with the same response categories into an item-in-a-series format, but do it carefully.

4. Ask one question at a time.

5. Minimize the use of matrices.

6. Begin asking questions in the upper left quadrant; place any information not needed by the respondent into the lower left quadrant.

7. Use the largest and/or brightest symbols to identify the starting point on each page.

8. Identify the beginning of each succeeding question in a consistent way.

9. Number the questions consecutively and simply, from beginning to end.

10. A consistent figure/ground format encourages the reading of all words. The use of reverse print should be limited to section headings and/or question numbers.

11. Place more blank spaces between the questions than between subcomponents of the questions.

12. Use dark print for questions and light print for answer choices.

13. If special instructions are essential, write them as a part of the question statement.

14. Optional or occasionally needed instructions should be separated from the question statement by font or symbol instructions.

15. Do not place special guidance instruction outside the question numbers or in boxes that separate them from the normal flow of the questionnaire.

16. Use of lightly shaded background colors as fields on which to write all questions provides an effective guide to respondents.

17. When lightly shaded background fields are used, identification of all answer spaces in white helps to reduce item non-response.

18. List answer categories vertically instead of horizontally.

19. Place answer spaces consistently to the left or right of the category labels.

20. Use numbers or simple answer boxes for recording of answers.

21. Vertical alignment of question subcomponents across questions eases the response task.

22. Avoid double or triple banking of answer choices.

23. Maintain spacing between answer choices that is consistent with measurement intent.

24. Maintain consistency throughout a questionnaire in the direction scales are displayed.

25. Use shorter lines to prevent words from being skipped.

26. Significant visual changes, applied in a redundant fashion, are essential for gaining compliance with skip patterns.

27. Words and phrases that introduce important but easy to miss changes in respondent expectations should be visually emphasized consistently, but sparingly.

28. Place instructions for determining eligibility for responding to a section or other major efforts to redirect respondents inside navigational guides rather than in a freestanding format to increase the likelihood they will be read.

Internet Surveys

1. Recognize that web surveys are subject to the same sources of error as other surveys

2. Develop a satisfactory identification system for respondents to control coverage error and assure survey credibility

3. Design web surveys for those with older browsers and poorer communication rather than those with state of the art access

4. Define desired response path by placing information in the order respondent should process it

5. To the extend practical, place needed definitions, explanations, and instructions in response path exactly where needed by the respondent

6. Use graphical languages to guide respondents through the desired response path

7. Anticipate potential mode effects that flow from these sources: no interviewer, respondent control, visual processing of information

8. Avoid visual composition that runs counter to the designer's measurement intentions

9. Avoid construction techniques that require multiple steps to answer items that require only one step in other survey modes

10. When respondents need to prepare information before answering, provide a printable version of the questionnaire as an email attachment

11. Keep questionnaire short on voluntary surveys

12. Design introductory page and first questions so that they are relevant, fast, and easy.

13. Use conventional formula similar to those normally used on paper self administered questionnaires, e.g. numbered items, left justification, vertical response choices

14. Avoid difference in the visual appearance of questions that result from different screen configurations, operating systems, browsers, partial screen displays, and wrap-around text

15. Don't require respondents to reconfigure computers, switch browsers, or download software in order to complete the survey

16. Provide instruction commensurate with population need. Instructions on how to take computer actions may or may not be necessary

17. Use drop down boxes only when answering process is simplified and identify each with click here

18. Do not require respondent to provide an answer to each question before being allowed to answer any subsequent question, unless a branching instruction depends on it.

19. Provide missing item requests in non-threatening language

20. Chose scroll, page by page, or mixed construction deliberately based upon measurement and response considerations

21. Avoid question structures that require scrolling or toggling between screens

22. Avoid excessive use of check all that apply questions because of the tendency of respondents to satisfice and choose earlier listed answer choices

23. To avoid premature termination, insert words and/or symbols that accurately communicate progress towards completion

24. Recognize that non-response stems from multiple sources: technological considerations, questionnaire design decisions, respondent computer skills, as well as implementation decisions.

25. Develop an implementation strategy that includes elements past research has shown to be effective in improving respondent to self administered questionnaires.

26. If web survey is short, consider embedding it into an email message so that one does not have to click to another location

27. Tailor implementation procedures to the population.

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This list was developed based on several short courses taught by Dr. Dillman