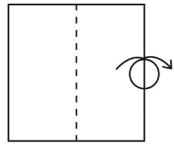


# DESIGNING RESEARCH QUESTIONNAIRES

*for* BUSINESS *and* MANAGEMENT STUDENTS



1

# INTRODUCTION

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## INTRODUCTION

This chapter explains the various types of questionnaire and how they have been applied to business and management research to date. This will enable you to assess the questionnaire methods and if they are able to capture the types of data required for your research.

## WHAT IS A QUESTIONNAIRE?

The most popular method of data collection within the field of business and management research is the questionnaire. Questionnaire design is one of the basic building blocks of management research, but it is not an end in itself. It is applied as a tool in which to ask repeat and specific research questions through face-to-face interviews or by other means such as online or by telephone. A questionnaire provides the access to record answers, as without it the questions will have no structure. Completed questionnaires provide the data that is subsequently used to produce the analysis of responses. Therefore, the questionnaire does not stand in isolation, but is an aid to the collection and analysis of data.



The term 'questionnaire' has been used within different contexts throughout management research, therefore the word 'instrument' can be used as an alternative description for that of the questionnaire. Some management consultants reserve the term 'questionnaire' exclusively for those that are self-administered (i.e. by mail or online), whilst others refer to them as interview protocols administered face to face or by telephone under the general title of 'questionnaires'. Some would argue that the questionnaire provides a formulated, structured and objective set of questions to gain information from respondents regarding a predetermined topic. This comprises of one or more question types ranging from open responses to closed responses, including rating scales or predetermined response options. The questionnaire can also include instructions for completion and alternative responses where appropriate, along with specific means for recording responses. It is also accompanied by an introductory letter (see Box 1.1).

Some market research practitioners combine the terms survey and questionnaire to mean the same. This book differentiates between the terms questionnaire and that of the survey, which holds a broader meaning. To this end, survey is referred to as the method of data collection or the overall research design. This includes areas such as the purpose of the study, type of investigation, study setting, sampling, data collection, analysis of responses and reporting of results, of which the questionnaire forms just one part. Therefore, when formulating the survey research design within business and management, the use of a questionnaire will form an integral part of the primary data collection process. Other primary data collection methods may include observations, interviews and projective methods.

When considering the questionnaire design, you should keep in mind the wider context in which the questionnaire will be used. What are the research objectives? What types of questions will be asked? How many people will respond? Who will be included in the study sample? How will the questionnaire be administered? How will the returned questionnaires be processed, edited and coded? Consideration of these broader issues will help you to design your questionnaire to abide by both ethical principles and work.

## THE PURPOSE OF THE QUESTIONNAIRE

Origins of the questionnaire have been imported from other social science research (e.g. sociology, psychology) and were used in different areas of management research by academics, management consultants and market researchers since the 1960s (Newman, 1962; Ford, 1967; CLDC, 1974). This approach was popularized by the decision theory developed during the 1960s. It suggests that the key to effective management is the ability to take rational decisions even under conditions of uncertainty. Hence the information generated from the questionnaire used evidences to reach adequate decisions (Easterby-Smith et al., 2012). During the past 30 years, questionnaire use within

business and management research has changed dramatically. New survey methods have been developed, applied and retained, from which existing methods have evolved (Dillman et al., 2009). Saunders (2012) acknowledges a clear trend in the use of self-completed questionnaires as that of a data collection tool within various organizations. Increasing popularity of the questionnaire is likely to continue due to the rapid growth of web-based software (e.g. SurveyMonkey™, Qualtrix), organization internet use and the desire of managers to obtain information in the support of decision making. Whether a questionnaire is administered online or by other methods, Hague (1993) comments that the questionnaire fulfils four purposes in business and management research:

- The primary function of the questionnaire is to gather reliable and valid (unbiased and accurate) information from respondents. It is important that you obtain as accurate a picture as possible from your research questions. Reliable and valid information is gathered through asking the right questions to the right people. It is important to utilize the most suitable data collection method in an objective manner that is logical to both respondents and researchers.
- The questionnaire should provide a logical structure so that data collection flows smoothly. It is important in many research studies, particularly those involving more than just a few people, that all respondents are asked the same questions in exactly the same order. Without this structure, there would be chaos and it would be impossible to build a clear overall picture regarding the investigated topic. For the respondents, it provides a logical sequence to the questions, driving towards a point and moving smoothly on to the next subject.
- The third purpose of the questionnaire is to provide a standard format in which to smoothly guide respondents to provide facts and opinions to be accurately recorded during data collection.
- Finally, the questionnaire facilitates data processing and data protection. The responses must be carefully recorded in a safe and secure location for future reference. Without a questionnaire, data collected from say, one hundred people might produce hundreds of hastily written comments, which would be hard to process. Appropriate data editing and analysis strategies can be determined through checking the actual and missing responses on the questionnaire. The questionnaire can also protect the authenticity of data whereby original copies of the completed questionnaires can be stored for future reference. There is a broad agreement among academics that completed questionnaires should be stored for up to five years or until the student graduation if it is part of a university project (i.e. masters dissertation). There may be a need to revisit or check the originality of the raw data. To this end, the recorded answers on the questionnaire can be used to verify the originality of primary data.

Examples throughout this book are used to illustrate these points. However, at this early stage it is useful that you recognize the different types of questionnaire.

## QUESTIONNAIRE CLASSIFICATION

Generally speaking, questionnaires are made up of two types of questions, depending on the type of response format and the degree of freedom given to respondents. These are known as open-response questions and closed-response questions. Closed-response questions are those in which respondents make choices from fixed alternatives introduced by the researcher. For instance, you could provide managers with a list of five challenges within the area of employee management. Thereon, they are asked to rank them in order of difficulty or to rate them on a scale of 1 to 5 where (1) indicates 'not challenging at all' and (5) indicates 'extremely challenging'.

Open-response questions are suitable when detailed information is required or where a listing of all possible answers would be lengthy. Open-response questions can be useful when respondents are given the freedom to respond however they wish. An example of an open-response question would be to ask managers to identify three challenges when managing employees during the economic recession, from which they would provide a space to list them. Another example would be to ask consumers what they like or dislike about online shopping, with the provision of space in which to write or type their answers.

Within the highly structured questionnaire, all if not the majority of questions are those of closed responses. Such structured questionnaires are easy for respondents to complete themselves and are often self-administered. Therefore, answers to closed-response questions can immediately be coded and quantitative data is generated. In a less structured questionnaire, all, or the majority, contain open-response questions whereby respondents can record their answers verbatim. Hence, open-response questions are frequently used to collect qualitative data. The most popular administration method for open-response questions is in person (e.g. face to face or by telephone). Open-response questions can also be self-administered via online or by postal methods.

It is likely that the highly structured questionnaire will include a few open-response questions, thereby allowing respondents to answer in their own words. For example, a customer satisfaction measurement questionnaire with mainly closed-response questions may include two open-response questions to capture different aspects of customer satisfaction. These open-response questions could ask 'What is the best aspect of customer service you have received?' and 'What is the worst aspect of customer service you have received?' Hence the open-response questions are used to gain an alternative view regarding customer satisfaction and to complement measurement data obtained via the closed-response questions. Similarly, a questionnaire with many open-response questions may also include some closed-response questions. For example, you may wish to explore key factors affecting reasons why employees are motivated to participate in decision making within their work environment. This questionnaire may also include some closed questions to register the age of the respondents or the type of organization they work for. Hence, the closed-response questions are used to complement the main

data generated from the open-response questions. Accordingly, they can be used to understand the demographic characteristics of the sample (gender, age, occupation) or the grouping of data according to different respondent characteristics in any subsequent analysis (e.g. comparing the motivation of male and female employees within large and small organizations).

At this early stage it may be helpful for you to view two types of questionnaire in their complete form in order to obtain a feel for the subject. The sample questionnaire, as shown in Box 1.1, is a highly structured self-administered questionnaire that includes many closed-response questions.

### **Box 1.1 Questionnaire with closed-response questions**

#### **THE BRAND EQUITY SURVEY**

Dear Sir/Madam,

We are a group of masters-level students at [.....] University, Faculty of Business. This survey is being conducted as part of our Marketing Strategy Module.

This study aims to investigate your experience with [.....] department store and its products and services. Your co-operation and opinions are very important to the success of this survey.

We would appreciate it if you could kindly spare a few minutes to answer the questions. It will take you less than 20 minutes to complete this questionnaire.

The answers from your questionnaire and others will be used for an academic project for the Marketing Strategy Module at [.....] University. You will notice that you are not asked to include your name or address anywhere on the questionnaire. Your responses will be kept anonymous. Only members of the research team will have access to the information you provide.

I hope that you will find the questionnaire interesting. When you have finished, please return it to the researcher. Please let us know if you have any questions regarding this study.

Kind regards,  
Marketing Strategy Students

*(Continued)*

(Continued)

### THE BRAND EQUITY SURVEY

#### SECTION A: About Your Visit Experience in [.....] Department Store.

**Q1. Approximately, how many times have you visited [.....] in the last two months?**

**Q2. What was the main reason for your last visit?**

- Browsing
- Purchasing
- Browsing and Purchasing
- Other (please state): \_\_\_\_\_

**Q3. What is the most important reason(s) for visiting [.....] today?**

\_\_\_\_\_

**Q4. Have you ever purchased in [.....]?  Yes  No (Please go to Q6)**

**Q5. What is the most important reason(s) for purchasing in [.....]?**

\_\_\_\_\_

**Q6. Generally speaking, how would you describe your overall experience with [.....]'s products and services? Please tick () the boxes.**

Completely dissatisfied	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	Completely satisfied
Worse than I expected	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	Better than I expected
Terrible	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	Delighted
Extremely poor value for money	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	Extremely good value for money

#### SECTION B: [.....] Department Store Brand Image

**Q7. Please circle one number from 1 to 5 to indicate your agreement or disagreement with each of the following statements regarding the brand image of [.....]. Use the scale of 1 (*strongly disagree*) to 5 (*strongly agree*).**

Statement	Strongly Disagree ←————→ Strongly Agree				
	1	2	3	4	5
[.....] has a visually appealing store atmosphere.	1	2	3	4	5
[.....] has visually appealing presentations in store.	1	2	3	4	5
Materials and facilities associated with [.....]'s service (e.g. decor, shopping bags, changing rooms) are visually appealing.	1	2	3	4	5
The store layout of [.....] is tidy.	1	2	3	4	5
[.....]'s products are visually attractive.	1	2	3	4	5
Employees of [.....] are competent in their jobs.	1	2	3	4	5
Employees of [.....] are helpful.	1	2	3	4	5
Employees of [.....] are friendly.	1	2	3	4	5
If I talk about [.....], I usually feel part of the [.....] brand.	1	2	3	4	5
If a story in the media criticizes [.....], I would feel embarrassed.	1	2	3	4	5
When someone criticizes [.....]'s products, it feels like a personal insult.	1	2	3	4	5
[.....]'s products reflect my personal lifestyle.	1	2	3	4	5
[.....] is totally in line with my lifestyle.	1	2	3	4	5
[.....]'s products support my lifestyle.	1	2	3	4	5

**Q8.** Please take a moment to think about the **overall image of [.....]**. Consider **the typical customer who shops in [.....]**. Imagine this person in your mind and then describe the person using **one or more personal adjectives** such as *organized, classy, poor, stylish, friendly, modern, traditional, popular*, or whatever personal adjectives you can apply yourself. Once you have done this, please tell us these adjectives below:

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(Continued)



(Continued)

**Q9.** Please circle one number between 1 and 5 to indicate your agreement or disagreement with each of the following statements. Use the scale of 1 (**strongly disagree**) to 5 (**strongly agree**).

Statement	Strongly Disagree ← → Strongly Agree				
	1	2	3	4	5
The typical customer of [.....] has an image similar to how I like to see myself.	1	2	3	4	5
The typical product of [.....] has an image similar to how I like to see myself.	1	2	3	4	5
The typical product of [.....] has an image which represents how I would like others to see me.	1	2	3	4	5

**Q10.** Please circle one number from 1 to 5 in your agreement or disagreement with each of the following statements regarding your future shopping intention in [.....]. Use the scale of 1 (**strongly disagree**) to 5 (**strongly agree**).

Statement	Strongly Disagree ← → Strongly Agree				
	1	2	3	4	5
I will recommend [.....] to someone who seeks my advice.	1	2	3	4	5
Next time, I will visit [.....] again.	1	2	3	4	5
Even if another fashion retail shop offers more attractive prices, I will continue to purchase [.....] products.	1	2	3	4	5
I will switch to other retail shops should I experience a problem with [.....]'s products and services.	1	2	3	4	5

**SECTION C: About You**

Please tick () the box or **provide** the information that most accurately describes you.

**Q11. Gender:**     Female     Male

**Q12. Age Group:**

- 16-24     35-44     55-64  
 25-34     45-54     65 and over

**Q13. Nationality:** \_\_\_\_\_

**Q14. What is the highest level of education you have completed?**

- GCSE                                     Undergraduate degree  
 A Level                                     Postgraduate degree  
 GNVQ/ NVQ                             Other: \_\_\_\_\_

**Q15. Occupation:** \_\_\_\_\_

**Q16. Average annual pre-tax personal income:**

- Less than £10,000                     £30,000 to £39,999  
 £10,000 to £19,999                     £40,000 to £49,999  
 £20,000 to £29,999                     Over £50,000

**Q17. Store location:** \_\_\_\_\_

**Thank you for completing this questionnaire.**

As can be seen from this example, the majority of questions are closed-response questions. This type of questionnaire is normally used in management research to collect quantitative data from a large number of respondents to investigate opinions, attitudes and behaviour. Statistical methods are subsequently employed for data analysis and data presentation prior to interpretation.

The sample shown in Box 1.2 is a telephone-administered questionnaire.

## Box 1.2 Questionnaire with closed- and open-response questions

### THE CUSTOMER RETENTION SURVEY

NOTE TO INTERVIEWER: Instructions are in CAPITALS. Text to be read to the respondent is in upper and lower case.

Hello, my name is [YOUR NAME] and I'm calling from [COMPANY NAME], an independent market research company based in [TOWN]. Please can I speak to the customer relationship manager or marketing manager? This has to be the person in charge of managing the firm's relationship with customers.

Yes - continue..... 1

(Go to Q3)

No - make appointment (hard or soft)..... 2

Refused..... 3

(Go to CLOSE)

Q1 TO Q6 ARE TO CHECK THE BUSINESS DEMOGRAPHICS TO ENSURE WE ARE SPEAKING TO AN ELIGIBLE FIRM.

#### Q1. SLIGHT CHANGE TO QUESTION WORDING

ASK ALL:

First, can I just check, are you the principal person responsible for managing the firm's customer management?

Yes - CONTINUE..... 1

(Go to Q4)

No - ASK TO BE TRANSFERRED TO CORRECT PERSON..... 2

(Go to Q2)

Q2. ASK ALL:

Is your business owned by an agency of local or national government?

Yes..... 1

(Go to CLOSE)

No..... 2

(Go to Q5)

Q3. How long have you been in charge of managing the firm's relationship with customers?

Years \_\_\_\_\_

Months \_\_\_\_\_

Q4. ASK ALL:

Is the business run...

READ OUT.

For profit..... 1

(Go to Q5)

As a social enterprise (i.e. run primarily for social objectives with any profits being mainly used to further these objectives)..... 2

(Go to CLOSE)

Q5. ASK ALL:

How many people, including you, work in this business?

TYPE IN EXACT NUMBER:

\_\_\_\_\_

(DO NOT READ OUT) Don't know/Refused..... 1

(Go to Q6)

Q6. ASK ALL WHO SAID 'DONT KNOW/REFUSED' AT Q5.

Which of the following bands best describes how many people, including you, work in this business?

READ OUT, SINGLE CODE.

Less than 250..... 1

(Go to CLOSE)

250-299..... 2

300-399..... 3

400-499..... 4

(Continued)

(Continued)

500+.....	5
Don't know.....	6

(Go to CLOSE)

**Q7. ASK ALL:**

Which of the following bands best describes the annual turnover of your company for the last full financial year?

READ OUT, SINGLE CODE.

IF THEY SAY HAVE NOT BEEN IN BUSINESS FOR A YEAR, ASK 'What is your turnover likely to be for the full year?'

Less than £10m.....	0
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(Go to CLOSE)

£10m-29.9m.....	1
-----------------	---

£30m+.....	2
------------	---

(DO NOT READ OUT) Don't know .....	3
------------------------------------	---

(DO NOT READ OUT) Refused .....	4
---------------------------------	---

**Q8. Which of the following bands best describes when your business was first established?**

Less than 12 months ago .....	1
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Over 1 but under 2 years ago.....	2
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2-5 years ago.....	3
--------------------	---

6-9 years ago.....	4
--------------------	---

10-15 years ago.....	5
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More than 15 years ago.....	6
-----------------------------	---

**Q9. What general approach do you use to identify customers at risk of leaving you or substantially reducing their commitment to you?**

.....

.....

Q10. For customers who are predicted to leave, what approach do you use to predict whether a customer is likely to leave your category entirely or switch to a competitor?

.....  
.....

Q11. Does your customer turnover prediction integrate across different marketing channels, and how?

.....  
.....

Q12. How do you manage the risk of false positives (customers where attrition is predicted who are, in fact, unlikely to leave, but where your offer of a retention incentive might either stimulate attrition or be taken as a benefit by the customer with no change in their intentions)?

.....  
.....  
.....

Q13. Do you use externally sourced customer data in predicting whether customers are likely to leave? Does this data include data on customers whose financial situation makes them likely to leave (e.g. because they have defaulted on credit to another supplier)? If not, why?

.....  
.....

Q14. What types of real-time marketing techniques do you use in your contact centres or on the web to maximize customer retention? (PROMPT: software, processes, data, etc.)

.....  
.....

Q15. Does your customer retention approach vary according to channels of customer acquisition, and how?

.....  
.....

Q16. How, if at all, do you reward (e.g. with offers or additional services) to maximize customer retention?

*(Continued)*

*(Continued)*

.....  
 .....  
 .....

**Q17. What are the positive or negative effects of how your firm communicates with customers on customer retention?**

.....  
 .....

**Please can I just confirm some details...**

**Q18 ASK ALL:**

Please can I note the full company address, including postcode?

TYPE IN CAREFULLY.

.....  
 .....

**Q19. ASK ALL:**

Could I just note your exact job title?

TYPE IN CAREFULLY.

.....

**Q20. Does the person in charge of customer relationship management have a management qualification or have they undertaken any management training?**

Yes ..... 1

No ..... 2

(DO NOT READ OUT) Don't know ..... 3

**Q21. GENDER - DO NOT ASK, BUT NOTE FROM VOICE!**

Is the person male or female?

Male ..... 1

Female..... 2

**Q22. ASK ALL:**

Which of the following bands best describes your age?

READ OUT, SINGLE CODE.

18-30 .....	1
31-50 .....	2
51-65 .....	3
66+ .....	4
Don't know/refused .....	5

### THANK AND CLOSE.

This type of questionnaire includes both closed- and open-response questions. The open-response questions are used to investigate the research topic (e.g. the implementation of customer retention strategies by large companies). The closed-response questions at the beginning and end of the questionnaire are used, respectively, to check if the respondents are qualified to participate in the study and data classification. Open-response questions are normally used in management research to collect qualitative data that explore the research topic in more depth. This data is usually collected from a relatively small number of respondents. Qualitative methods are applied for data analysis (see Saunders et al., 2012 for qualitative data analysis).

Fraser and Lawley (2000) comment that the questionnaire can also be classified according to administration methods. Mail, face to face, telephone and online are the most common administration methods used. Mail questionnaires are sent to potential respondents by post and are self-completed. Personally administered questionnaires are administered in person (e.g. face to face) and the responses are recorded by the researcher or a research assistant. Telephone questionnaires are conducted in person but are administered via telephone contact. Online questionnaires are self-completed by respondents, their administration method being performed via the World Wide Web.

The choice of questionnaire administration methods depends on the research objectives, sample size, relative cost, question sensitivity, potential response rate, your personal preferences and many other criteria that are specific to your particular research project. Table 1.1 compares and summarizes questionnaires according to their administration methods, contrasting a variety of key characteristics.

## SUMMARY

In summary, it is suggested that the questionnaire is an objectively formulated and structured set of questions in the gathering of information from respondents regarding a predetermined topic. It has shown how questionnaires can be categorized according to question type (open-ended or closed-ended) and the administration method (face to face, mail, telephone and online).



**Table 1.1** Comparison of questionnaire administration methods

<i>Characteristic</i>	<i>Personally administered (face-to-face) questionnaire</i>	<i>Mail questionnaire</i>	<i>Telephone questionnaire</i>	<i>Online questionnaire</i>
Use of closed-response questions	Fair	Excellent	Excellent	Excellent
Use of open-response questions	Excellent	Fair	Fair	Fair
Flexibility (ability to ask clarification)	Excellent	Poor	Excellent	Poor
Questionnaire complexity	Simple to complex	Simple to moderate	Simple only	Simple to moderate
Rapport with respondents	High	Very low	Moderate	Very low
Interviewer bias	High	None	Medium	None
Use of visual aids	Good	Poor	Poor	Excellent
Asking sensitive questions	Fair	Good	Poor	Poor
Response time of questionnaire	Short to long (up to 120 minutes)	Short to medium (up to 30 minutes)	Short to medium (up to 30 minutes)	Short to medium (up to 30 minutes)
Speed of data collection	Immediate	Slow (2-8 weeks from distribution and depends on number of follow-ups)	Immediate	Fast (2-4 weeks from distribution)
Response rates	Fair (30 to 60% reasonable)	Poor (15 to 50% reasonable)	Good (50 to 70% reasonable)	Variable (15 to 50% reasonable)
Relative cost	High	Low	Moderate	Very low

The remainder of the book is organized in the following way. Chapter 2 considers the place of research philosophy and the choice of questionnaire. Chapter 3 explains exactly what is required when designing your questionnaire, so that you will be conversant with what the design involves. Chapter 4 – Parts I and II – introduces a process model to explain how to execute the four stages of questionnaire design:

1. to determine the required information and target respondents;
2. to prepare a draft questionnaire;
3. to determine the sequence of questions and questionnaire layout;
4. to pilot test and assess the questionnaire reliability and validity.

Chapter 5 presents questionnaire examples that have been published and used within different management disciplines. The examples selected show a broad representation of different research designs and sampling methods, as well as illustrating how the questionnaires are used and results reported. Finally, Chapter 6 discusses the strengths and limitations of the questionnaires.

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