

Your Survey:

SPA's 20 Top Tips & Silver Bullets

Customer Surveys & Understanding Customer Behaviour

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Background

SPA has always done lots of survey work – starting with projects for big pub chains and off licences, and moving on to surveys for all-comers – shopping centres, tourist attractions, museums, libraries, colleges, small businesses, B2B. Our standard is formula simple: SPA designs the questionnaire; the client collects the data; and SPA analyses it, supplying results back to the client in PowerPoint.

This document is for clients who take a more hand-on interest in surveys – either because they want to do all or part of the survey work themselves (e.g. to help keep down costs), or because they want a better understanding of how SPA might go about survey work undertaken on their behalf. It comprises two main sections:

- **SPA's 20 Top Tips** – pointers to some of the more important considerations in designing and running a survey of customers or visitors (indeed any user or market survey).
- **The “Silver Bullets”** – questions worth including in many surveys because of their “value for money”, telling you a huge amount for a modest input of time and questionnaire space.

You Don't Need To Go There!

Some people love to immerse themselves in all the nitty-gritty of survey design and analysis. Others don't. They just want to use the results to move their business forward.

If you want out because nitty-gritty is not for you, **let SPA design and analyse your survey.** Just call us on 01926 334978 – or email us at surveys@spamarketing.co.uk

On the other hand, if you want to get to grips with your survey – even to do it all yourself – read on. We hope you'll find our pointers useful.

SPA's 20 Top Tips on Customer Survey Design

1. Ask yourself. **Do you really need a survey?** If, just by trading, your business generates detailed data about customers and what they buy, could you use that instead? Of course, if trading yields **no worthwhile data** or you want to look at **customer satisfaction**, a survey may be the only way to get detailed information for your business.
2. **Measuring satisfaction** isn't always easy. Regular surveys help monitor trends; and points scales (e.g. 9 = completely satisfied 0 = completely dissatisfied) are good for comparing different factors. But if 1 or 2 factors are far more important than all the others, treat your results with caution.
3. **For some issues, you'll need to compare survey results with other data.** To find out what types of people your customers are, you might use MOSAIC to profile them against all people living in the same area. To spot where your penetration rates are highest, you could compare the distribution of customer Postcodes with Census population data. In deciding what data to collect, and how to collect it, take into account the need to link in (and the need for comparability with) any external data of this kind. Comparative approaches can also shed light on the kinds of people you're **not** getting as customers, and the areas where your market penetration is lowest.
4. **It is best to set down explicitly exactly what your survey seeks to achieve.** Your goals will decide who you need to survey, and what you need to ask. Woolly goals will leave room for doubt about whether talking only to customers is enough. For a full understanding of **business you didn't get** you may be forced to go beyond customers – speaking to those who didn't take up your quotes, or assessing awareness amongst the kinds of people you sell to (even the public at large.)
5. **How many to interview?** There are two main kinds of survey: qualitative and quantitative. **Qualitative** research generally drills down into the nuances of opinions and attitudes. The numbers you can afford to talk to in such depth is small; robust statistics are not the goal; and

sample sizes are often tiny. **Quantitative** research – on the other hand – aims to produce reliable hard figures, so you have to interview larger numbers. And the finer the results breakdown you want, the more people you'll need to interview to get reliable information from your survey. SPA can advise on the minimum figures depending on your objectives. However, if you're not thinking of a sample size of **at least** 250 then you should ask yourself whether or not you really need to produce reliable statistical information.

6. **An explicit budget limit can be very useful** – even for quite small surveys. If a **tight budget** means you can't survey the recommended numbers, consider whether you'd rather base decisions on a smaller sample or on no data at all. Asking fewer questions may help a little – enabling you to survey slightly more people for more reliable results whilst staying within the budget. So focus down on what you really need to know, and cut out any non-essential issues.
7. You may still need to **compromise to stay in budget**. Perhaps you could **accept less detailed breakdowns**, reducing the sample size required. **Stratified sampling** too may help get reliable data from smaller samples. Instead of surveying 5% of customers across the board, interview a fixed number (e.g. 100) of each type. This greatly reduces the numbers surveyed in common types, where sampling errors are already low and diminishing returns have set in. SPA will advise on sampling – allowing for any administrative overheads they involve.
8. **Public sector surveys may have special requirements**. Typical private sector goals are finding more people like the existing customers, selling those customers more, and selling them something else. Such goals are well addressed by a bog standard survey of existing customers. By contrast, public sector clients are often interested in groups making little use of a service – particularly priority groups at risk of social exclusion for whom positive action might be needed to ensure equal access. Straight Customer Surveys may not be a cost-effective way of assessing service take-up by such low usage priority groups. A better approach is to identify the key groups explicitly and design a bespoke sampling procedure to match.
9. **Implementation: How to do the Survey**. For small amounts of information, it may be best to get your own staff to ask the questions and record the answers. Staff-run mini-surveys give higher, more consistent response rates with far fewer joke entries. And if the answers fit onto a single line per respondent, they won't take too long or prove overly expensive. For more questions, you will probably have to get customers to fill in questionnaires. These have to be well designed – so everyone understands them and completes them in the same way. Even then, both response rates and consistency tend to be lower. Letting customers take questionnaires away with them for completion later is not to be recommended if it can be avoided. Even with if Freepost envelopes are provided, the proportions returned tend to be very low – and may be biased toward those with particular reasons for remembering (dissatisfaction, professional interest, nothing better to do etc.)
10. **When to Survey**. To avoid bias, surveys should if possible be conducted on **all days** of one or more **whole** weeks. If business is different in school holidays, consider including a week at half term too – otherwise results will be represent term only. To allow for seasonal variations, survey work should ideally cover different parts of the year, but this is seldom realistic: most clients want to get their survey done and dusted so that results can be used as soon as is possible. Customer satisfaction surveys may be an exception: if you monitor trends in satisfaction over time, you may be able to schedule interviews in several weeks spread across the year.
11. **What Questions to Ask**. Think about what you'll do with the answers. Don't ask more questions than you need. And keep things as simple as possible. Some questions are purely investigative (e.g. opinions) – you don't know the answers and need to find out in an unbiased way. Others may be designed to test a theory, or to split customers into dissimilar segments. Whatever their purpose, the most valuable questions are those which split customers (or the population at large) into key segments with markedly different patterns of behaviour, preferences or opinions. Where one or more segment is tiny, you could use an initial screening question to identify the segment to which each potential respondent belongs, and then deliberately over sample the smaller segments. Such stratified sampling can help you get better quality data for a fixed budget – provided that survey results are re-weighted to allow for any deliberate over-sampling.

12. **The Silver Bullets.** Make the most of silver bullets – small questions which tell you a lot. These are the time & date of interview, and the respondent's Postcode, gender, age, family status and employment status (or social class). More detail below.
13. **The Quick Survey.** A worthwhile survey may not mean a long questionnaire: there may be only a few key questions. However, it is essential to apply the same formal approach to all respondents and to record their answers in a standardised way into a simple database. Many issues can be addressed by short, highly targeted surveys of this kind – one survey per issue! A quick survey is a great way to understand why some customers did not take up your costings for example.
14. **What About A Competition?** For quick answers from a representative sample of customers, we **don't** recommend using a competition. Busier, older and more affluent customers tend not to bother with competitions, so your results are likely to be biased. However, if you just want a dirty great database of the mobile phone numbers or addresses for lots of customers – particularly those potentially most responsive to promotions – then a competition may be worth considering.
15. **Analysis: where to start.** First, key-in the survey sheets, taking great care about whether data is numeric or text. Then check that you've got data for **all** the sheets intended or completed. You can waste an awful lot of time analysing incomplete datasets, and going back to process late arrivals. Next, tag all survey records with any additional information – attaching time, date and day details to each batch, tagging each record with the appropriate weight, and so on. Finally check any postcodes and attach any derive data – the grid reference, the MOSAIC code, your nearest branch location etc. The goal is a complete survey database with every record properly tagged with all the relevant identifiers, weights and derived data. Only then can analysis "proper" begin.
16. **Analysis: the basic numbers.** Taking each question in turn, count how many respondents give each answer. Any derived data attached can be treated in the same way – e.g. counting the respondents from each MOSAIC Group, or the number in each distance band from your store. If you asked how much respondents spent, you may want to group the answers into bands, and then calculate the total spend of respondents in each band. To get the **average** spend by band, simply divide the total spend (of respondents in a given band) by the number in that band.
17. **Combining survey and trading data can provide better insights.** Use trading data to re-weight your survey to reflect the true distribution of customers by day of the week, age group or amount spent. Or use trading data to "**scale up**" a **small survey**, by estimating what the figures would have been if you had interviewed all your customers. There's nothing like scaled-up totals for **understanding** what your survey results might really mean for the business as a whole.
18. **Analysis: what the results mean.** In trying to understand the significance of results, you may need to look at them several different ways:
 - **Basic numbers may tell it all:** 85% of customers are Class AB; enough said!
 - **Comparisons** (with the national average or data for local area) may tell you if 35% of customers from MOSAIC Group X (or Age Group Y) is unusual.
 - **Relationships** between different questions may be crucial: For example, customers aged 20-35 may have by far the highest average spend.
 - **Segments & Key Variables:** The results may help you to segment – spotting key variables that help pinpoint your main target groups, their requirements and preferences, how much they're likely to spend, and how often they might come back.
19. **Maps can be a valuable additional form of analysis.** It's hard to see geographical patterns from lists of Postcodes. But map your customers, and compare the numbers with the total population living in the same areas, and you'll soon see your key catchments. And you may also spot areas where penetration rates are so low that you could open a new outlet without poaching customers from an existing branch. Mapping satisfaction scores, drivetime to the branch, or frequency of use may also tell you things that you really need to know about your current service levels. Pretty maps are pretty expensive if you don't need them – but pretty well indispensable if you do.

20. Surveys Made Easy. If surveys sound like an uphill struggle, **let SPA do the hard work for you!** We've got a wealth of experience; so just tell us what you want; and we'll design and print it for you. Once you've got your customers to fill it in, we'll key in and analyse the answers; and present the results back to you in your chosen format. It's as easy as that! **Give us a call on 01926 334978** – or, if you prefer, **email us at surveys@spamarketing.co.uk**.

Our last “tip” is less advice than blatant advertising! So consider a more general version of the same point. There are companies “out there” that specialise in surveys, and there is software also “out there” specifically designed for survey analysis. Don't underestimate the value of such experts and expert systems in enabling you to get what you need – relatively painlessly – from your Customer or Visitor Survey. If you're determined to do it yourself, even something as basic as Microsoft's MapPoint map have a role in helping you map your customers – albeit the maps won't look as pretty as they might!

The “Silver Bullets”

What They Are, And How They Work

In considering what questions to ask in your survey, remember the six “silver bullets” - simple questions that take little time to ask but tell you a huge amount. These are as follows:

1. Interview **time & date**
2. Respondent’s **gender**
3. Respondent’s **Postcode**
4. Respondent’s **age**
5. Respondent’s **family status**
6. Respondent’s **employment status**

1. Interview time & date. Design your survey well, and you won’t even need to ask this: just enter a batch code, and it will be logged with the completion time and date. Or to avoid the admin put time & date in the form design. Either way you can analyse respondents by time of day, day of week, and weekday v weekend. If you have accurate customer totals by time and date (e.g. from till rolls or EPOS), you can re-weight survey responses to match the known distribution.

2. Respondent’s gender. If your own staff are administering the survey, they won’t (usually) need to ask this. Analysing respondents by gender gives you insights into who uses your services – and whether the behaviour of male and female customers is different. And again you can use the data to re-weight survey results if you know the true split of customers by gender.

3. Respondent’s Postcode. You can allocate the vast majority of respondents to a home address simply by collecting their postcode. In tourist hotspots, you may need country of origin too. Together they’ll tell you:

- **What area/district they’re from** - using Postcodes or local authorities.
- **Customer penetration** – using population data to spot areas with more customers than you’d expect from the numbers living there.
- **How far they have travelled** – comparing the grid reference of their Postcode with that of where they were interviewed.
- **The time it took them to drive** – same again
- **What kind of people they’re likely to be** – using a Postcode classification like MOSAIC, ACORN or Personix. As an Experian agent, SPA normally uses MOSAIC.

A few software tools offer one of these capabilities (e.g. MapPoint does customer penetration mapping if you know how). But very few end-users have software which covers all of them, so virtually all will need specialist assistance. This is where SPA can help: we’ll do the lot for you.

4. Respondent’s age. Asking for age group – not exact age– reduces refusal rates. The question is quick and simple, and enables you to classify respondents into very meaningful sub-groups which can also be used for weighting if you know the true age mix of your target audience.

5. Respondent’s family status. For certain products, it is invaluable to know whether the respondent has children (or, sometimes, a partner). Even more general is **Lifestage**, covering the gamut from unattached singles to empty nesters and widows/widowers.

6. Respondent’s employment status. Similarly, it is very revealing to know whether respondents are employed (full or part time), students, or retired. Social Class is an extended and more precise variant of this type of variable.

If you’re determined to do your Survey by yourself, some of the Silver Bullets may be a help. Otherwise, you could phone SPA on 01926 334978 – who’d undoubtedly be a BIG help.

