Usability Testing for Survey Research: Best Practices & How To

Usability testing in survey research allows in-depth evaluation of how respondents and interviewers interact with questionnaires, particularly web and mobile surveys. A respondent may understand the survey question and response options, but may be unable to select their answer accurately on the small screen of a smartphone. Although there is a growing body of literature on best practices for web surveys and mobile devices, not all design guidelines work equally well for all surveys and all survey populations. In addition, it is clear that the capabilities of computerized surveys are constantly emerging. Examples are the use of images, videos, maps and GPS, interactive features, and mobile devices. As a result, it is critical for researchers to have the necessary tools to evaluate, test, and modify surveys to incorporate user-centered design in an iterative method as part of the survey pretesting process.

Course Objectives

After this course, students will be able to:

- Identify potential usability concerns with surveys
- Incorporate iterative user-centered design and testing into survey development process
- Plan and moderate user testing to improve design of surveys
- Analyze and revise surveys to improve usability

Course Methodology

- Four 90-minute online lectures on Tuesdays at 4PM EST:
  Oct 3, 10, 17, and 24.
- Weekly assignments and readings
- This course will be conducted only in English

Price

- Students: $100
- UXPA Members: $400
- Non-members: $700

Course Contents

Lecture 1: Usability and Survey Research Fundamentals and Demo

- Why is usability needed for survey research?
- Usability best practices for surveys
- Applying usability testing to surveys

Lecture 2: Planning

- What to test: conceptual testing, paper prototypes, wireframes
- When to test: Iterative design and testing
- Who to test with: Number and type of participants

Lecture 3: Test Materials, Metrics, Equipment, Location

- Developing the protocol guide
- Determining test metrics
- Hardware and software considerations

- Test location and set up (lab vs field vs remote)
- Considerations for testing mobile surveys

Lecture 4: Moderating and Analyzing

- Think aloud and verbal probing
- Avoiding moderating pitfalls
- Collecting and recording data
- Analyzing results

Presenters

Emily Geisen, Survey Methodologist, Usability and Cognitive Laboratory Manager, RTI International

Emily Geisen specializes in designing and evaluating survey instruments to improve data quality and reduce respondent burden. She teaches a graduate course on Questionnaire Design at the University of North Carolina. As a market and social researcher, she had conducted hundreds of usability tests on a variety of projects, including the 2020 Census questionnaires.

Emily developed a short course (with Jen) on Usability Testing for Survey Researchers that was taught at the 2016 AAPOR annual conference, the 2016 International Conference on Questionnaire, Design, Development, Evaluation and Testing, and the 2017 European Survey Research Association conference. Her latest book, Usability Testing for Survey Research, was published in March 2017. Emily received her M.S. in Survey Methodology from the University of Michigan's Program in Survey Methodology where she was an Angus Campbell fellow.

Jen Romano Bergstrom, Experimental Psychologist; UX Research Lead, Facebook/Instagram; President, UXPA International

Jen has over 12 years of experience planning, conducting and managing user-centered research projects. She is currently a UX Researcher at Facebook/Instagram, where she works to understand the UX of Facebook and Instagram in emerging markets. Jen specializes in efficient applications of empirical methods to ensure quality is not lost while working fast to get actionable results. In addition to being a skilled UX researcher and practitioner, Jen specializes in eye tracking, survey design, experimental design, and cognitive aging.

Jen frequently presents research and novel methods at academic and industry conferences, and she publishes in peer-reviewed journals, magazines and blogs. She is co-author (with Emily) of Usability Testing for Survey Research (2017) and co-author/editor of Eye Tracking in User Experience Design (2014). She has served on User Experience Professionals Association (UXPA) boards for several years – currently as the President of the International UXPA, and previously Director of Marketing and Communications, as well as President, Vice President, and Conference Chair for UXPA-DC. Jen received a Ph.D. and M.A. in Applied/Experimental Psychology from The Catholic University of America and a B.A. in Psychology from Central Connecticut State University.