



第四讲（第7章） 问卷设计

Questionnaire Design



内容提要

- 理解问卷设计的基本要求和程序;
- 掌握单个问题的设计;
- 掌握问卷中问题的结构编排;
- 掌握问卷中格式的编排;



问卷与问卷设计

- **问卷**，也叫调查表、访问表格或询问工具，它由一组从被调查者处获取信息的格式化的问题构成。一份完整的问卷通常由标题、问卷说明、调查主题内容、被调查者基本资料和编码构成。
- **问卷设计**是依据市场调研的目标，明确调研所需的信息，设计问题的格式和措辞，并以一定的格式，将其有序地排列组合成调查表（问卷）的活动过程。



小组讨论

- 有人说：“问卷设计是一门艺术，所以无需遵循固定的指南，而是依赖于研究者的创造性和巧妙构思。”你对此有何看法？
- “Because questionnaire design is an art, it is useless to follow a rigid set of guidelines. Rather, the process should be left entirely to the creativity and ingenuity of the researcher.”

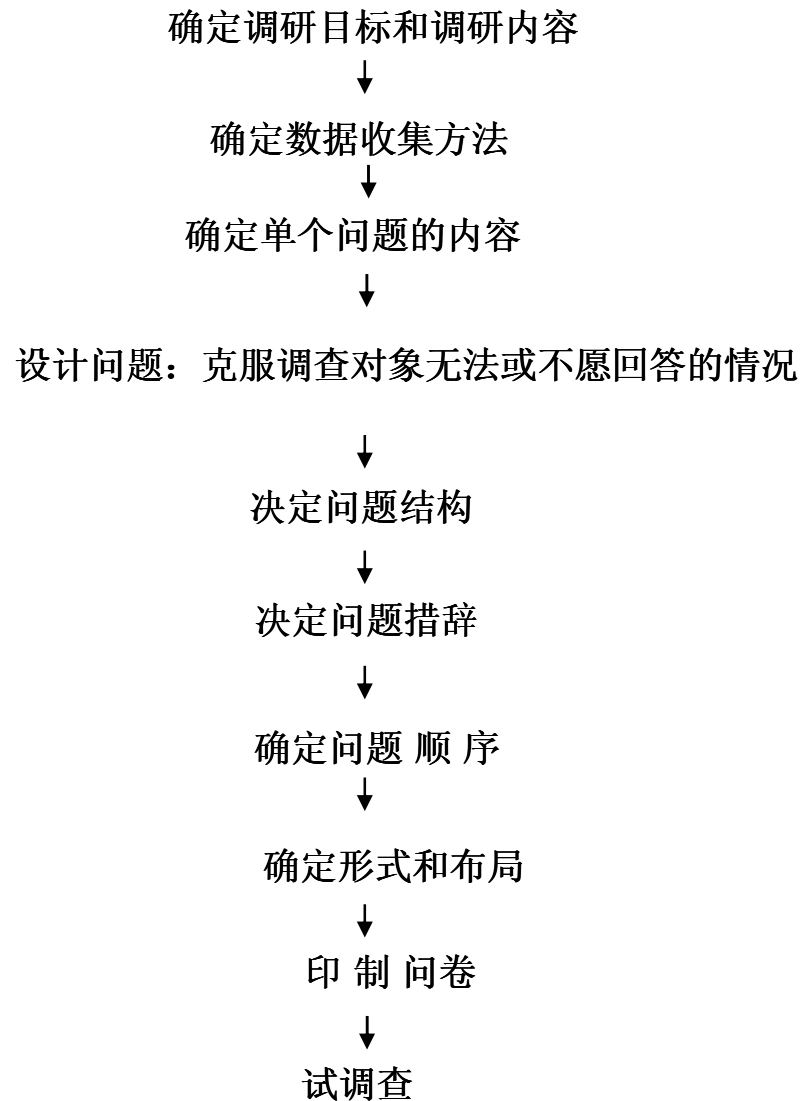


问卷设计的要求

- 1、提供与调研目标一致的信息。
- 2、便于调查工作的开展。
- 3、便于对问卷的处理。
- 4、问卷应该将回答误差减到最小。
- 5、问卷应该简洁、有趣、内容明确、具有逻辑性。



问卷设计的过程（10个步骤）





1.确定调研目标和调研内容

- 第一，问卷的内容应当与调研目标相一致。
- 第二，问卷的内容应当完备有效，能为调研人员提供充分的信息。
- 第三，问卷内容的设计应当遵循效率的原则，在满足调查要求的前提下，确定的信息一定要精简。



2.数据收集方法对问卷设计的影响

Department Store Project

Mail Questionnaire or Electronic Questionnaire

- Please rank order the following department stores in order of your preference to shop at these stores. Begin by picking out the one store that you like most and assign it a number 1. Then find the second most preferred department store and assign it a number 2. Continue this procedure until you have ranked all the stores in order of preference. The least preferred store should be assigned a rank of 10. No two stores should receive the same rank number.

Store	Rank Order
1. Lord & Taylor	_____
2. Macy's	_____
.	
.	
10. Wal-Mart	_____



2.访谈方法对问卷设计的影响

Telephone Questionnaire

- I will read to you the names of some department stores. Please rate them in terms of your preference to shop at these stores. Use a ten point scale, where 1 denotes not so preferred and 10 denotes greatly preferred. Numbers between 1 and 10 reflect intermediate degrees of preference. Again, please remember that the higher the number, the greater the degree of preference. Now, please tell me your preference to shop at(READ ONE STORE AT A TIME)

Store	Not So Preferred					Greatly Preferred				
	1	2	3	4	5	6	7	8	9	10
1. Lord & Taylor	1	2	3	4	5	6	7	8	9	10
2. Macy's	1	2	3	4	5	6	7	8	9	10
.										
.										
.										
10. Wal-Mart	1	2	3	4	5	6	7	8	9	10



3.确定单个问题的内容

- 首先要问：这个问题有必要吗？
- 然后要确定是用一个还是数个问题收集该信息。
有时需要用几个问题以一种明确的方式来得到所要的信息。
例如：

Are you satisfied with the location and interior design of this restaurant?

(Incorrect)

- 这种问题被称为双重问题（**double-barreled question**）或模棱两可的问题。

Are you satisfied with the location of this restaurant?

Yes

No

No opinion

Are you satisfied with the interior design of this restaurant?

Yes

No

No opinion

(Correct)



4.避免无法回答的情况发生

- 4.1调查对象具备相关知识（信息）吗？
 - 使用过滤问卷（filter questionnaire）
- 4.2调查对象能够记住吗？
 - 避免调查对象不能记住的问题
 - 在设计问题时需要技巧
- 4.3调查对象能清楚表达吗？
 - 尽量少用主观问题



4.2调查对象能够记住吗？

How many gallons of soft drinks did you consume during the last four weeks? (Incorrect)

How often do you consume soft drinks in a typical week? (Correct)

1. ___ Less than once a week
2. ___ 1 to 3 times per week
3. ___ 4 to 6 times per week
4. ___ 7 or more times per week



4.避免不愿回答的情况发生

- 4.4避免要求调查对象付出较大努力才能回答的问题
- 4.5向调查对象提供合适的背景
- 4.6向调查对象提供合理的调查目的
- 4.7问题应尽可能少直接涉及敏感信息
- 4.8其他增加调查对象自愿性的技巧
 - 4.8.1将敏感的话题放在问卷的最后。
 - 4.8.2在问题开始之前先说明感兴趣的行为是很普通的。
 - 4.8.3用第三人称方法提问。
 - 4.8.4将问题隐藏在一组调查对象愿意回答的其他问题中。
 - 4.8.5提供答案的类目而不是特定的数字。
 - 4.8.6用随机化的技巧。



使问题更易于回答

Please list all the departments from which you purchased merchandise on your most recent shopping trip to a department store. (Incorrect)

In the list that follows, please check all the departments from which you purchased merchandise on your most recent shopping trip to a department store.

- | | | | |
|-----|------------------------|-------|-----------|
| 1. | Women's dresses | _____ | |
| 2. | Men's apparel | _____ | |
| 3. | Children's apparel | _____ | |
| 4. | Cosmetics | _____ | |
| . | | | |
| . | | | |
| . | | | |
| 16. | Jewelry | _____ | |
| 17. | Other (please specify) | _____ | (Correct) |



5.选择问题结构

市场调研中的问题按其询问方式可以分为直接性问题、间接性问题和假设性问题

- 1、直接性问题
- 2、间接性问题
- 3、假设性问题



5.选择问题结构

市场调研中的问题按收集资料的性质可以分为事实性问题、动机性问题和态度性问题。

- 1、事实性问题
- 2、动机性问题
- 3、态度性问题



5.选择问题结构

市场调研中的问题按答辩的形式可以分为开放式问题和封闭式问题。

- 开放式(**open-ended**)问题是非结构化(unstructured)问题，调查对象用他们自己的话回答。

如：Do you intend to buy a new car within the next six months?

- 封闭式(**close-ended**)问题是结构化(structured)问题，指定了一组答案选项和答案格式。结构化问题包括多重选择问题、二项问题或者量表问题。



多重选择题 Multiple-Choice Questions

- 在多重选择题中，研究人员提供了答案的选项，要求调查对象在选项中选出一个或多个答案。

Do you intend to buy a new car within the next six months?

- _____ Definitely will not buy
- _____ Probably will not buy
- _____ Undecided
- _____ Probably will buy
- _____ Definitely will buy
- _____ Other (please specify)



二项（是非）问题

- 二项问题（ **dichotomous question**）只有两个答案选项，如是或否、同意或反对等。
- 通常，用一个中立的选项来对两个选项进行补充，比如“没有意见”，“不知道”，“都是”或“都不是”。

Do you intend to buy a new car within the next six months?

_____ Yes
_____ No
_____ Don't know



量表

- Scales were discussed in detail in Chapters 8 and 9:

Do you intend to buy a new car within the next six months?

Definitely will not buy	Probably will not buy	Undecided	Probably will buy	Definitely will buy
1	2	3	4	5



6. 选择问题措辞(*Choosing Question Wording*)

- 6.1 明确问题，用6W来明确定义问题。who, what, when, where, why, and way (the six Ws). Who, what, when, and where are particularly important.

Which brand of shampoo do you use?你使用哪种牌子的洗发香波?
(Incorrect)

Which brand or brands of shampoo have you
personally used at home during the last month?

In case of more than one brand, please

list all the brands that apply. (Correct)

上个月，你本人在家所使用的洗发香波的品牌是哪种或哪几种？若有一种以上的品牌，请列出所有你用过的品牌？



6. 选择问题措辞(*Choosing Question Wording*)

6.2 使用通俗易懂的词汇 Use Ordinary Words

"Do you think the *distribution* (分销) of soft drinks is adequate?"
(Incorrect)

"Do you think soft drinks are readily available when you want to buy them?"
(Correct)



6. 选择问题措辞(*Choosing Question Wording*)

6.3 使用明确的词汇 Use Unambiguous Words

In a typical month, how often do you shop in department stores?

在典型的1个月内，你在百货商店购物频率如何？

_____ Never 从不

_____ Occasionally 偶尔

_____ Sometimes 有时

_____ Often 经常

_____ Regularly 定期的 (Incorrect)

请问您通常每周锻炼多少次？

请问您在过去一周内锻炼了多少次？（从今天开始往回数7天）



6. 选择问题措辞(*Choosing Question Wording*)

- 6.4 避免诱导性或倾向性的提问
- A **leading question** is one that clues the respondent to what the answer should be, as in the following: 诱导性问题指暗示了调查对象应该是哪个答案的问题。

你认为这种化妆品对你的吸引力在哪里？

- (1) 迷人的色泽 (2) 芳香的气味 (3) 满意的效果 (4) 精美的包装
(5) 其它

你认为这种化妆品对你的吸引力在哪里？

- (1) 色泽 (2) 气味 (3) 使用效果 (4) 包装 (5) 价格
(6) 其它



6.选择问题措辞(*Choosing Question Wording*)

- 6.5避免隐含选择 (implicit alternative)
- 在选项中没有明确表达出来的选择称为隐含选择。
 1. Do you like to fly when traveling short distances?
(Incorrect)
 2. Do you like to fly when traveling short distances, or would you rather drive?
(Correct)



6.选择问题措辞

- 6.6避免隐含假设(implicit assumptions),隐含假设是问题中没有指明的假设。
- Questions should not be worded so that the answer is dependent upon implicit assumptions about what will happen as a consequence.

1. Are you in favor of a balanced budget?

(Incorrect)

2. Are you in favor of a balanced budget if it would result in an increase in the personal income tax?

(Correct)



6.选择问题措辞

6.7避免推论和估计，调查对象在回答问题时不必做推论或估计。

"What is the annual per capita expenditure on groceries in your household?" (Incorrect)

"What is the monthly (or weekly) expenditure on groceries in your household?"

and

"How many members are there in your household?"
(Correct)



6.选择问题措辞

- 6.8正面陈述和负面陈述最好交替使用
- Questions that are in the form of statements should be worded both positively and negatively.



Quiz

- 当你外出吃晚饭时，你是不是有时候会在同一家餐馆吃饭？
- ____是 ____否
- 政府目前对环境保护管制的是否充分？
- ____充分 ____不充分
- 请指出你平均来说阅读《读者》杂志的多少内容？
- ____不足1/3 ____1/3到1/2 ____多于1/2



7.确定问题的顺序

- 新产品：钢笔和铅笔的组合，售价29美分。

购买兴趣问题之前提问的问题	被调查者中回答对购买这种新产品“非常感兴趣”的人数百分比
1没有问任何问题	2.8
2只问了产品优点	16.7
3只问了产品缺点	0.0
4既问了产品优点，也问了产品缺点	5.7



7.确定问题的顺序

7.1开头的问题*Opening Questions*

- 开头的问题应该有趣、简单且不咄咄逼人。The opening questions should be interesting, simple, and non-threatening.

7.2信息类型*Type of Information*

- 作为一般的原则，首先应该获得基础信息，其次是分类信息，最后是标识信息。As a general guideline, basic information should be obtained first, followed by classification, and, finally, identification information.

7.3困难的问题*Difficult Questions*

- 困难的、敏感的、使人尴尬的、复杂的和无趣的问题应该放在靠后位置。Difficult questions or questions which are sensitive, embarrassing, complex, or dull, should be placed late in the sequence.



7.确定问题的顺序

7.4对后面问题的影响*Effect on Subsequent Questions*

- 泛指的问题放在特定问题之前，这种方法称为漏斗法 (funnel approach).

Q1: “在选择一家百货商店时，你认为哪些因素是重要的?”

Q2: “在选择一家百货商店时，地理位置的便利有多重要?”

(Correct)

Q1: “你喜欢这个社区的哪些方面？不喜欢它的哪些方面？”

Q2: “总的说为交通设施怎么样？”

Q3: “你觉得是不是应该新增加一条公共汽车线路？”



7.确定问题的顺序

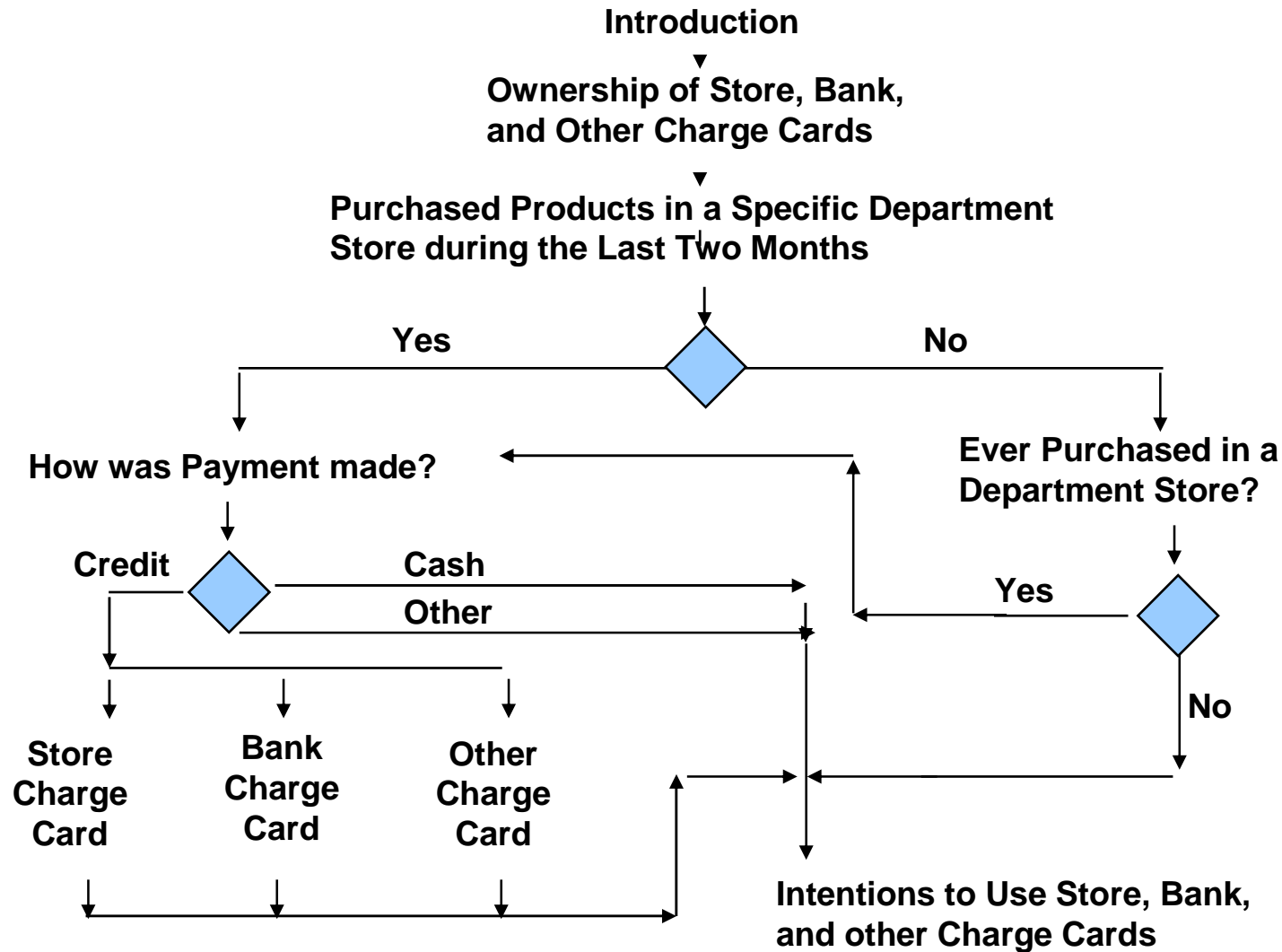
7.5逻辑顺序 *Logical Order*

The following guidelines should be followed for branching questions:

- **7.5.1**分叉问题应该尽可能靠近引起分叉的问题。
- **7.5.2**分叉问题应该安排得让调查对象无法预期将要提供哪些附加的信息。



一个问卷设计的流程图





8.问卷的形式和布局

- **8.1**将问卷分为几部分是一个好的习惯。 Divide a questionnaire into several parts.
- **8.2**每一部分的问题应该编号。 The questions in each part should be numbered, particularly when branching questions are used.
- **8.3**最好对问卷预编码。 The questionnaires should preferably be precoded.
- **8.4**问卷本身应该编有序列号。 The questionnaires themselves should be numbered serially.



9.问卷的印制

- 9.1 问卷应该用质量好的纸张复印，并有一个专业的外观。 The questionnaire should be reproduced on good-quality paper and have a professional appearance.
- 9.2 当问卷较长时，应该采用小册子的形式。 Questionnaires should take the form of a booklet rather than a number of sheets of paper clipped or stapled together.
- 9.3 同一个问题及其选项应该放在同一个页面上。 Each question should be reproduced on a single page (or double-page spread).
- 9.4 单个问题应该使用垂直的答案栏。 Vertical response columns should be used for individual questions.



9.问卷的印制

- 9.5当有许多问题使用同一套答案选项时，就使用栅格。
Grids are useful when there are a number of related questions which use the same set of response categories.
- 9.6应该避免将问题挤在一起而使问卷看上去更简短。
The tendency to crowd questions together to make the questionnaire look shorter should be avoided.
- 9.7单个问题的指示或说明应该放在离问题尽可能近的位置。
Directions or instructions for individual questions should be placed as close to the questions as possible.



10.试调查（预调查）

试调查（**Pretesting**）指为了识别并消除可能存在的问题，对一个小样本的调查对象进行问卷的测试。

- **10.1**问卷在没有经过充分的试调查时不应该用于现场调查。.
- **10.2**问卷的所有方面都应该经过测试。.
- **10.3**试调查和实际调查的调查对象应该来自同一总体。.
- **10.4**试调查最好以人员访谈的形式进行。.



10.试调查（预调查）

- **10.5**试调查中的访谈人员应该包括各类人员。
项目主管、问卷设计人员以及研究团队中其他关键成员都应该执行一些试调查访谈。
- **10.6**试调查的样本量在**15-30**人左右。



回顾：问卷设计检查清单

- Step 1. 确定调研目标和调研内容 Identify the objective of survey**
- Step 2. 确定数据 收集方法 Type of Interviewing Method**
- Step 3. 单个问题的内容 Individual Question Content**
- Step 4. 克服无法及不愿回答的情况 Overcome Inability and Unwillingness to Answer**
- Step 5. 选择问题结构 Choose Question Structure**
- Step 6. 选择问题措辞 Choose Question Wording**
- Step 7. 确定问题顺序 Determine the Order of Questions**
- Step 8. 形式和布局 Form and Layout**
- Step 9. 问卷的印制 Reproduce the Questionnaire**
- Step 10. 试调查 Pretest**