|  |  |
| --- | --- |
| Public Opinion Survey Guidance |  |

This resource provides guidance on how to use public opinion surveys to inform or support tobacco control efforts. In addition, it addresses sampling and survey administration considerations and when and where to reach potential respondents.

## Purpose

[Public opinion surveys](https://tobaccoeval.ucdavis.edu/evaluation-guide#PUBLIC%20OPINION%20SURVEY%20[POS]) assess public perceptions or opinions about a topic or an issue. In tobacco control, they typically measure awareness, knowledge, sentiment, and beliefs about tobacco-related issues. They may also ask about people’s exposure to tobacco influences, policy option preferences, and inclinations to take action. These surveys almost always include an array of demographic questions so that projects can determine any differences across various segments of the population. Results are used to inform and mobilize communities, assess campaign readiness for next steps, and leverage evidence of voter support into local policymaker action.

## Survey Design

Applying an end-use strategizing process when developing or adapting the survey instrument helps ensure that the data actually answer the evaluation questions you set out to investigate. For resources on end-use strategizing and developing evaluation questions, see <https://tobaccoeval.ucdavis.edu/end-use-strategizing>.

When developing the survey, identify what you need to know and how the data will be used. Think about how it will be analyzed and what comparisons you’ll want to make. For example, if you want to understand whether respondents from various neighborhoods or with certain demographic characteristics respond differently from each other, then you’ll need to include questions that will pick up those variations. Be sure the categorical variables match the end use (e.g., instead of citywide zip codes, ask which supervisorial district respondents live in, or age breakdowns) that correspond to tobacco retail licensing policies (under 21 years, instead of 18 when young people are considered adults, etc.)

Think about whose views or experience will be most important or informative for your purposes. Is it the general population, or do you only care about people with specific characteristics? If the latter, then you’ll need to include some screening questions to make sure you hear just from people that match your survey parameters. For example, you may want to screen for people that are:

* 18 years or older (of voting age)
* Are tenants in multi-family housing
* Live in a particular zip code or district
* Have access to a mobile device or a telephone (if the survey is only done online or via phone)

Place any screening questions at the beginning so that the survey quickly ends if respondents don’t fit your criteria. This could also prevent bots from infiltrating an online survey.

Make sure the survey will be understood in the same way by everyone in the sample. Some ways to ensure that include:

* Adapting the survey to the reading comprehension level of the populations of interest.
* Providing simple and clear instructions. Making it easy to navigate through the survey.
* Minimizing any barriers that may prevent people from taking the survey (e.g., What kind of barriers might there be when getting respondents to complete the survey at a bus stop? Survey length? Access to wi-fi? Downloading the survey link or app? Having disabilities?).

## Sampling

With any public opinion survey, the goal is to collect data from the most representative sample of the target population in order to get the most accurate picture of what the community is thinking and feeling. The parameters of the sample and the methods to obtain that sample need to be defined before conducting the survey.

There are many different ways to select a sample (see <https://tobaccoeval.ucdavis.edu/parameters-and-sampling>), but there are other considerations to think about as well before strategizing a sampling plan, such as:

* What sample size and composition will be rigorous enough for those you hope to inform or persuade? A [sample size calculator](https://www.calculator.net/sample-size-calculator.html) can provide guidance about how large the sample should be given the size of the total population.
* What’s the best mode for collecting the data from your population of interest – in person, online, via phone or mail? How will you find or contact them? How comfortable are they with technology and do they have access to devices and the internet? How much time will they have to spend on the survey?
* Does your project have sufficient capacity in terms of volunteers, staff, and budget to survey an *n* number of respondents in a systematic way?
* How long will it take to collect the data and how soon do you need it? If being administered in person, are locations close by or are they scattered over far distances? This can increase the amount of time and cost to carry out data collection.

These factors will affect not only the size of your sample, but also your choice of sampling strategy. When deciding, take steps to ensure that smaller subgroups and hard-to-reach populations 1 will be adequately represented in the sample by using strategies like oversampling, cluster or stratified sampling, or going out of your way to find and include historically underrepresented groups in the data collection. Oversampling is a “hack” to ensure that people from underrepresented groups will be selected to take the survey while still maintaining a representative sample. To do this, you would just intentionally survey more people from these subgroups and adjust the sample with [weights](https://www.pewresearch.org/fact-tank/2016/10/25/oversampling-is-used-to-study-small-groups-not-bias-poll-results/) 2 so that the sample reflects the true population.

## Implementation

The way in which the survey is delivered or administered could determine who ends up being in the sample and therefore what the data reveals about an issue. Public opinion surveys are typically delivered online, in-person, by telephone or mail. The table below compares the different modes for administering a survey. For multiple waves of data collection, it’s important that the same sampling protocol and survey administration(s) be applied each time even though the individual respondents will likely differ from wave to wave.

The table below shows the different modes of survey administration, how to administer them, where and when to outreach to potential respondents, and the pros and cons of each survey mode.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Mode** | **How to administer?** | **Where to outreach?** | **When to outreach?** | **Pros/Cons of Mode** |
| Online | Set up the survey in an online survey platform (e.g., Survey Analytics, Alchemer, Survey Monkey) and distribute the survey link via email lists or online posts according to the sampling protocol. The survey should look inviting, short, and easy to navigate on a device. Avoid matrix-type questions. | It may be difficult to obtain email lists for the entire community; try organizations that serve specific populations. Post on a mix of local forums (e.g., NextDoor) and social media groups (e.g., Facebook, Instagram) with the capacity to target people within your sample parameters. | Research shows that the highest click-to-open rates occur at 10 am, 1 pm and 6 pm on weekdays.3 | Pros:   * Is less time and resource intensive than in-person data collection * Typically yields a 40% response rate; 51% if the survey link is sent by SMS5 * Allows respondents more time to take the survey * May be able to capture a larger sample size of the population * It’s easy to use skip logic in the survey   Cons:   * Managing and cleaning email lists can be messy * Results may be skewed by self-selection bias (who decides to complete the survey) * Potential for bots to infiltrate the survey responses |
| In-person | Partner with/get legitimacy from community insiders so people will take the survey. Follow the sampling protocol and choose a spot where you are not in the way and it is quiet enough to be heard clearly. Provide shade, light, seating, water if the survey takes more than a few minutes. Approach potential respondents by being polite, introduce yourself, the organization, and the purpose of the survey. Explain how long it will take to complete and ask if they’d be willing to take it. If they’re not, thank them and move on to the next respondent. Read the survey aloud and enter responses into a mobile device or if you’ll get more accurate data from respondents with a questionnaire (avoiding social response or prestige bias), use pen and paper. | For simple random or stratified random samples, use a systematic way to visit every nth house, business, etc. in your target communities. Otherwise, you’ll need to understand neighborhoods, behavior patterns, where people congregate, how to approach them. Strategically select a mix of locations where various segments of the population of interest may be found and willing to spend 5-10 minutes to take the survey e.g., community fairs, park events, commercial street corridors, public transit stops, entrances of retail stores, laundromats, etc. | The best time to outreach in-person will depend on the place, context of the event, and the type of people you want to approach. | Pros:   * May obtain a more representative sample by monitoring targets and making adjustments along the way * Team leaders can shadow data collectors and quickly correct problems * More likely to reach less technologically savvy people   Cons:   * In- person data collection is time- consuming and expensive * Data collectors may diverge from the protocol * Respondents may feel social pressure to answer questions in a particular way * Without insider knowledge of the community and how to gain access, the sample can get skewed |
| Telephone | Use simple sentence structure and make the survey easy to follow by clustering similar question types and topics together so respondents get used to the pattern of questions and response choices. Read choices aloud more than once if needed.  Train data collectors to speak fluently, clearly and at a moderate pace in the appropriate language of the respondent. Follow the sampling protocol and use a compelling first line to ask for their help. Introduce yourself, the organization, the purpose of the survey, and how long it will take. Then ask if they are willing to take the survey. If they’re not interested, thank them for their time and move on to the next number. | Local landline or mobile phone directory. Make sure to obtain the most accurate and current list of phone numbers as you’re able to. | Calling during the day will likely reach retirees, homemakers, and those who work evenings or nights. Avoid dinnertime or calling after 8 pm. 4 | Pros:   * The sample is purely random; however, you can set sampling targets for specific characteristics with screening questions * Allows you to attempt calling any one number more than once if it was unsuccessful the first time   Cons:   * Expensive to contract with an external agency to conduct these calls * Requires multilingual data collectors * Does not ensure an accurate reach as not everyone has a landline or mobile phone; many people screen their calls and do not answer numbers they don’t recognize; the response rate is around 20% 5 |
| Mail | Best practices make use of:   * a postcard sent in advance to create interest, awareness and alertness to the survey being mailed * a concise introduction letter/invitation that explains what the survey is for, who is collecting the data, how data will be used and why they should participate (what difference will it make?) * either a link to the online survey or a paper questionnaire for them to send back * follow up postcards or calls to remind them you still want their input on the survey | Mailing list with names and addresses. Make sure to obtain the most accurate and current list of mailing addresses as you’re able to. | Allow sufficient mailing time for letters/postcards to reach list. Avoid holidays or busy mail periods (e.g., tax deadlines, etc.). | Pros:   * Research shows people are more likely to take a survey if accompanied by a compelling introduction letter * May be less expensive compared to some of the other methods * Allows people to take their time to produce thoughtful answers * You can share results with them because you have their address   Cons:   * Produces the lowest response rate – 10% of all modes 5 * May need to send follow up reminders * Can be time consuming and costly if they will need to mail back their completed questionnaire * Can’t control when the mail will actually arrive |

Once you have decided the best way to administer the survey with your population of interest, pilot-test the instrument with 4-6 people from those populations. Have them tell you what each question and response choice means and which ones were unclear or inappropriate. For more guidance, see <https://tcec.sf.ucdavis.edu/pilot-testing>.

Train data collectors and assess their readiness. Are they adequately prepared to conduct this poll? For more guidance on data collector training, see <https://tcec.sf.ucdavis.edu/data-collector-training>. Monitor data collectors in the field to make sure they don’t stray from the protocol.

Tailor the approach to the specific population of interest. Partner with community gatekeepers who can provide you with credibility and access to various segments of the community. Adjust data collection strategies as needed when it’s clear they are not working in certain conditions. Be sure to document the challenges and resulting workarounds for reports and for future data collection waves to follow. To increase the participation rate among potential survey-takers:

* Meet them where they already tend to gather (e.g., laundromats, grocery stores, food banks, resource centers)
* Enlist trusted members of the community to promote and conduct the survey
* Show up at various times of the day or week when the population will be the least pre-occupied

## References

1. Description of hard-to-reach populations. <https://journals.sagepub.com/doi/pdf/10.4256/mio.2010.0014>
2. Resource for oversampling and weighting. <https://www.pewresearch.org/fact-tank/2016/10/25/oversampling-is-used-to-study-small-groups-not-bias-poll-results/>
3. Best days to send emails. <https://www.campaignmonitor.com/resources/guides/email-marketing-benchmarks/>
4. Best time to call respondents. <https://www.driveresearch.com/market-research-company-blog/5-ways-to-increase-phone-survey-response-rates/>
5. Response rates for survey administration modes. <https://www.questionpro.com/blog/survey-modes-and-response-rates/>
6. For specific guidance about the End Commercial Tobacco Campaign public opinion survey, see <https://tobaccoeval.ucdavis.edu/ectc-public-opinion-survey>

Text Box