

# Annex B: Participation Survey 2023/24 findings from usability testing of the paper questionnaire

March/April 2023

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# 1. Introduction

This report outlines findings from usability testing of the Participation Survey paper questionnaire.

## 1.1 Methodology

The primary focus of these interviews was to explore the **usability** of the paper questionnaire sent out with the second reminder letter. The paper questionnaire contains a selection of key measures included in the online survey.

The questionnaire is presented as an A4 booklet and uses a variety of questionnaire formats or layouts. How participants approached the booklet and answered these questions was explored in detail. There were two key parts to the interviews:

- **Part 1:** Observation and Think Aloud: first, interviewers simply watched how participants approached the questionnaire and encouraged them to verbalise ('think-aloud') what they were thinking as they worked through each page.
- **Part 2:** Retrospective Feedback: once the participant had completed the questionnaire, the interviewer followed up with specific questions about how they found the task.

As **cognitive** testing of the questions was already undertaken at a previous phase, this was a secondary focus although issues were noted where they spontaneously came up and a summary of each can be found in Table 2. Cognitive testing explores how participants understand, process, and respond to survey questions.

Kantar Public's research team prepared a guide to check for specific issues, while being alert to areas of misunderstanding that may arise. Researchers drew on established assessment techniques during the testing, including verbal probing, think-aloud, and paraphrase protocols, and observation of non-verbal behaviours. This provided valuable insight into how the questions were being interpreted.

Usability (and cognitive) testing was carried out with 5 participants on 22<sup>nd</sup> and 23<sup>rd</sup> March 2023. Participants were recruited by Criteria Fieldwork Ltd, a specialist qualitative research recruitment agency. As it was important to conduct the usability testing with respondents who would generally opt to complete the survey on paper rather than online, Criteria only recruited respondents who do not use the internet, or do not use it very often.

In addition, to ensure a reasonably broad range of respondents were recruited, Criteria were asked to recruit a mix of respondents based on gender, age, social grade, highest educational qualification and ethnicity. Information about other demographic characteristics was collected during the interview.

To allow full exploration of how participants approached the booklet, all interviews were conducted in person at Kantar Public’s offices in London. Interviews were approximately an hour in length and participants were given a £50 monetary payment as a thank you for their contribution.

**Table 1: Profile of participants**

Quota group	Sub-group	Number of participants (5)
<b>Gender</b>	Female	2
	Male	3
<b>Age</b>	16-34	0
	35-59	1
	60 or older	4
<b>Social grade?</b>	C1	3
	C2	2
<b>Education</b>	Mix of highest educational qualification: GCSE or equivalent to undergraduate degree	
<b>Ethnicity</b>	Mix of ethnicity	
All to not have access to high-speed broadband or only access the internet once a week or less		

## 2. Key findings: usability testing

### 2.1 How participants initially approached the booklet

Participants differed in how they approached the questionnaire. On being passed the booklet there were three main strategies adopted:

- **Reading** through the front page and accompanying information before making a start on the questions.
- **Skimming** the front page to pick out key information before turning over to find the questions.
- **Skipping** the front page altogether and heading for the first place they were required to write something or cross a box.

The front page could also be used as a reference point where the participant was unsure what to do or wanted to check something, for example one participant regularly used the front page to refer back to as they worked through the booklet.

One participant had a significant visual impairment and needed a magnifying glass to read each word individually in turn. They also found it challenging to cross the answer boxes and write in the open text boxes. Understandably, the questionnaire took a very long time to work through and only half was covered in the interview. This participant said they would have continued and completed the questionnaire if they were filling it in at home. This interview helps in reminding us that streamlining, condensing and simplifying the wording wherever possible is essential and will help reduce participant burden and potential drop out.

For participants who read or skimmed the front page, the key pieces of information that stood out were that there was an incentive (although this was mentioned as a point that could be emphasised in more detail as it is a key thing that could be missed), the filters and that they were required to enter a cross in the boxes. One participant commented that the front page was “bureaucratic” and it was felt to contain a lot of information that could be reduced. This participant said there was so much text that they just “wanted to get started”.

As strategies will naturally differ, we need to bear in mind that participants will commonly skip the information on the front page. Therefore, it is important to ensure that the questions make sense ‘on their own’ without the supporting context, and that all essential information is contained in the question wording. Two participants commented that they would like to know more about who was conducting the survey, specifically which government department beyond the HM Government branding and

how the government and Kantar Public related to each other. Although it is worth noting that for the live survey, an accompanying letter will be sent alongside the paper questionnaire containing this information.

### **Recommendations:**

- Continue to look for opportunities to streamline and reduce wording wherever possible.
- Include all essential information within the question wording as we cannot expect participants to search elsewhere in the booklet.
- Consider moving 'Each person who completes the survey will receive a £10 shopping voucher as a thank you' to sit in the top paragraph and highlight in bold.

## **2.2 Columnar layout**

Some pages (such as pages 2 and 13) have a dual column layout, with columns reading from left to right in a newspaper-style format. Other pages (such as page 5 or 8) have a single column of questions that use the full width of the page.

During testing participants had a uniform approach to tackling the columnar layout. Dual column pages were approached left to right in the way they were read and answered. The dual column format was easily followed by participants. It did not create issues or lead to errors in response. Nothing was missed by participants when using this format.

While some participants did note the shift between single and dual column layouts this was only when prompted and the difference in layout did not stand out or cause confusion.

### **Recommendations:**

- Retain columnar approach.

## **2.3 Grid layouts**

The grid questions are possibly the most complex design used in the paper questionnaire. Some grids take up a whole page (Q9, Q10, Q12 and Q17) while others only cover half a page (Q13, Q30 and Q35).

The grid layouts were not always intuitive; it could be unclear what the task involved and while participants always managed to work out what to do this could be clearer, especially at Q30. One participant occasionally crossed two boxes on one row and said that they felt the wording could be larger and clearer.

There were two main strategies participants adopted when approaching the grids and participants could switch between the two depending on the question:

- Reading **each row in turn** and selecting an answer before moving on to the next row
- Reading **all rows** before returning to the top to work through again, this time filling in the answers.

Where participants had not taken part in the activities in the grid they got into a pattern where they were expecting to answer 'Not in the last 12 months', essentially 'hovering' over this column while checking the row wording to verify it didn't apply.

As noted elsewhere, the instruction wording in gold could be difficult to read and we recommend making this darker throughout the questionnaire.

One participant was confused by the 'Not in the last 12 months' being next to 'At least once a week', saying this was too much of a jump. This participant was also confused by the fairly subtle change in scale between the different grid questions (for example, Q12 and Q13).

The 'Other (write in)' boxes at the grid questions could be confusing. Participants did not always realise they were meant to write something in these, mistaking them for part of the border or background rather than a write in box. One participant did not realise their purpose and decided to select the 'nearest' response option from the remaining categories on the list rather than writing down their real answer.

Participants could also write answers in the box without also crossing the 'other' box.

### Recommendations:

- Better connect question wording to the grid below at Q30 (see Table 2 for question level findings and suggested wording).
- At all grids, change instruction wording to 'Please cross one box on each row' and ensure one is underlined.
- Insert a gold vertical line between 'Not in the last 12 months and the other columns and move this column to the right-hand side/end of the scale so that the scale follows a more logical order.
- Display all instructions in darker gold to make easier to read.
- Ensure if something is written in the other specify box that the 'Other' cross box is captured by the scanning team.
- Emphasise the presence and purpose of the other specify boxes at full page grids (Q9 and Q10) by reducing the width slightly so that there is a coloured background surrounding the box.
- Amend the instruction to '(write answer in white box below)' at full page grids (Q9 and Q10).

## 2.4 Answer boxes

The paper questionnaire has several different answer boxes for different means.

The first of these are the small answer boxes that are to be marked with a cross by respondents as per instructions on the front page of the booklet. There were no issues with the size of the box and participants marked them with a cross as instructed. One participant did remark that pages with fewer answer boxes were easier to answer, but did not have an issue with the boxes themselves.

At question two there is a larger box for numbers, and this question asks respondents to fill out their age. As with the small answer boxes, there appeared to be little difficulty in using these boxes.

Throughout the questionnaire larger open specify boxes are used where a respondent can enter an answer that is not already coded in the questionnaire. While generally useable when needed by the respondent, their size and placement did lead to some issues and error. At questions 9 and 10 for example, the open specify boxes are so large that participants were unsure that they were meant to use or write in them which led in some instances to them being missed or unused.

Apart from size, the placement of open specify boxes as part of response lists also led to confusion among some participants. Positioning the box above the 'no reason in particular' code at question 11 for example, or the 'none of these' option at question 9 as another, meant that these final codes were missed by some participants. The implications were mixed with different approaches taken as a result. In some instances, this led to the participant choosing the 'nearest' option in the list and as a result mis-answering the question, whereas in other instances the questions were left blank.

### Recommendations:

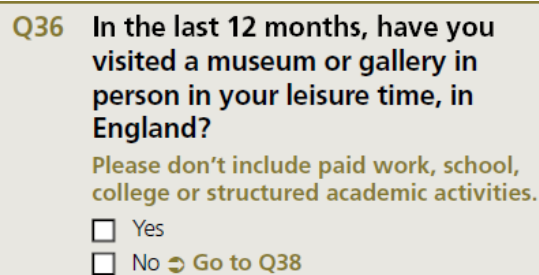
- At open specify answers on single column pages, move other specify box to sit alongside the code and reduce overall width.
- As detailed in the grid layouts section, emphasise the presence and purpose of the other specify boxes at full page grids (Q9 and Q10) by reducing the width slightly so that there is a coloured background around the box.
- Again, as noted in the grid layouts section above, amend the instruction to '(write answer in white box below)' at full page grids (Q9 and Q10).



## 2.5 Filtering and navigation

Throughout the survey, filters are employed to help the respondent navigate the survey and answer only the questions pertinent to them. In all, three types of filters are used – arrow, box and bar types. Each type of filter is best suited for a particular type of question routing.

**Arrow filters** are most common and generally employed for basic navigation, where there are relatively few answer options and filtering only applies to one question. The filter is supposed to be the simplest to follow. Respondents found this filter type most comprehensible. However, we saw a few instances where respondents noted the filters not standing out that much. Consequently, some arrow filters were missed, such as Q21. See an example below (Q36):



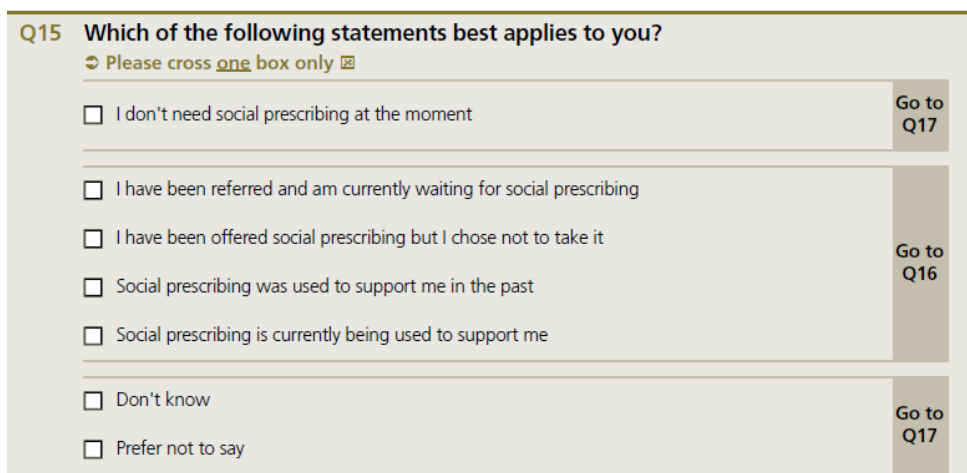
**Q36** In the last 12 months, have you visited a museum or gallery in person in your leisure time, in England?

Please don't include paid work, school, college or structured academic activities.

Yes

No ➔ Go to Q38

**Box filters** are located to the side of answer codes and are most effective where filtering affects and applies to more than one answer code. This avoids overwhelming the respondent with numerous arrow filters, which could then become confusing. During testing, we observed that respondents tended to focus intently on the answer options themselves, thereby missing the filters, which were located quite far from the text. One respondent grasped the concept only mid-questionnaire, when the apparent lack of filtering stumped them. See an example below (Q15):



**Q15** Which of the following statements best applies to you?

➔ Please cross one box only ☒

<input type="checkbox"/> I don't need social prescribing at the moment	Go to Q17
<input type="checkbox"/> I have been referred and am currently waiting for social prescribing	
<input type="checkbox"/> I have been offered social prescribing but I chose not to take it	Go to Q16
<input type="checkbox"/> Social prescribing was used to support me in the past	
<input type="checkbox"/> Social prescribing is currently being used to support me	
<input type="checkbox"/> Don't know	Go to Q17
<input type="checkbox"/> Prefer not to say	

**Bar filters** are typically used in two scenarios – where the filter is more complex and requires significant text or where the filter applies to multiple questions. A box filter allows us to input lengthier navigation instruction or save space, where the filter applies to multiple questions. The primary issue observed with this filter was that it does not sit within the relevant questions, so respondents were more likely to miss it,

particularly where the filter was located somewhere mid-page. Two respondents did not notice it at all. An example of a bar filter is below:



If you selected no at Q25 and none of these at Q28 please answer Q29

**Q29 Why haven't you used public library services digitally or online in the last 12 months?**

➔ Please cross all boxes that apply ☒

### Recommendations:

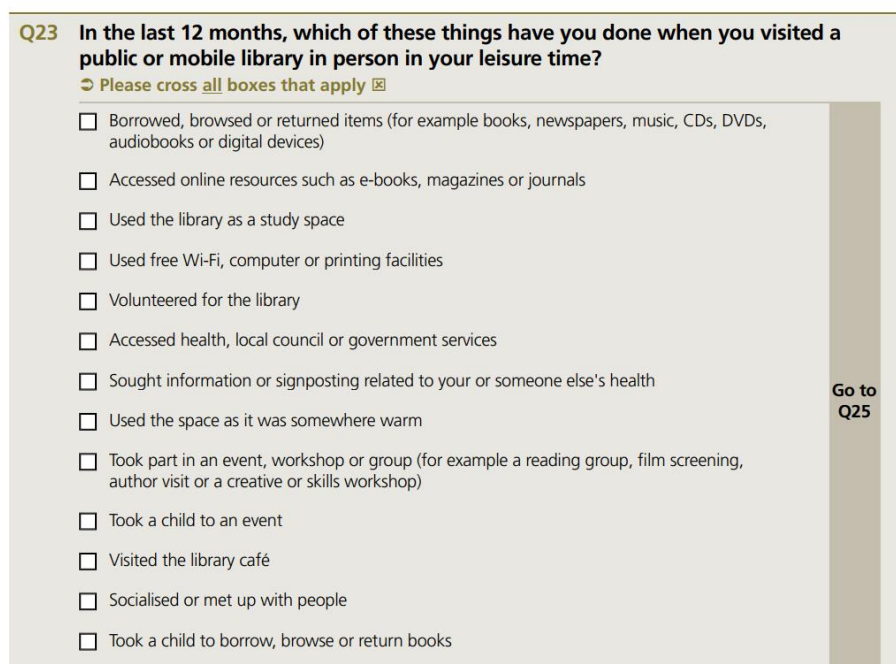
- Arrow filter: at Q57, change the arrow filters to box filters and include 'Go to Q58' for 'Employee' option.
- Arrow filter: emphasise the filter more, either by changing colour along with general colour scheme or in another way (e.g. using a darker shade of gold)
- Box filter: on all single column pages (and some double column pages where specified) move the box filter a little closer to the wording to increase likelihood it is seen and followed.
- Box filter: at Q23, consider changing the box filter to a bar at the bottom of the question – now go to Q25.
- Box filter: at Q53, add a box filter for 'Yes' ('Go to Q54')
- Bar filter: For at least several respondents, these filters were missed altogether. We would recommend changing the "i" icon to one that grasps the respondent's attention more, such as an arrow. We would also recommend placing them at the top of the page, where possible, rather than mid-page.

## 2.6 Instructions

Most questions in the survey include instruction text. Instructions can be divided into two types – those that guide the respondent in thinking about their answers and others that tell the respondent how to mark their answers. The two instruction types can be employed simultaneously.

An example of the first type of instruction is “*Please do not include anything you did through paid work, school or college or structured academic activities*”. This instruction tells the respondent exactly how to approach answering the question.

An example of the second type of instruction can be seen in the screenshot below (Q23). It states the question is multi-code, rather than single-code so the respondent should select all applicable answer options.



**Q23** In the last 12 months, which of these things have you done when you visited a public or mobile library in person in your leisure time?

➔ Please cross all boxes that apply ☑

- Borrowed, browsed or returned items (for example books, newspapers, music, CDs, DVDs, audiobooks or digital devices)
- Accessed online resources such as e-books, magazines or journals
- Used the library as a study space
- Used free Wi-Fi, computer or printing facilities
- Volunteered for the library
- Accessed health, local council or government services
- Sought information or signposting related to your or someone else's health
- Used the space as it was somewhere warm
- Took part in an event, workshop or group (for example a reading group, film screening, author visit or a creative or skills workshop)
- Took a child to an event
- Visited the library café
- Socialised or met up with people
- Took a child to borrow, browse or return books

Go to Q25

In some cases, instructions also appear at the start of sections (e.g. Section 9, see below), where the instruction applies to multiple questions:

## Section 9: Wellbeing

The next questions ask about your feelings on aspects of your life. They are included to help measure people's wellbeing and the information produced will not identify you or anyone in your household.

There are no right or wrong answers. For each of these questions please give an answer on a scale of 0 to 10, where 0 is 'not at all' and 10 is 'completely'.

### Q42 Overall, how satisfied are you with your life nowadays?

⇒ Please cross one box only ☒

Not at all satisfied											Completely satisfied	
0	1	2	3	4	5	6	7	8	9	10		Prefer not to say
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Q43 Overall, to what extent do you feel that the things you do in your life are worthwhile?

⇒ Please cross one box only ☒

Not at all worthwhile											Completely worthwhile	
0	1	2	3	4	5	6	7	8	9	10		Prefer not to say
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In general, instructions were followed by respondents. For the second type of instruction, in most cases it was already apparent whether a given question should be multi or single-coded. Nevertheless, some respondents pointed out that the instruction text did not stand out very well, resulting in instructions potentially being missed. The other key observation was instructions took up space, adding to general feedback that the survey altogether was lengthy and could be made shorter.

## Recommendations:

- Colour: Use a slightly darker gold shade for instruction wording or change the colour
- Grids: change instruction wording at grids to 'Please cross one box on each row'.
- Remove some 'Please cross one box only' instructions to save space. An example is Q22, where doing so would allow the box filter in Q23 to be moved closer to the text (see earlier recommendation in section 2.5)

## 2.7 Colour scheme

The colour scheme proved to be one of the more divisive topics. The majority of respondents had no issue with it or took little notice, however some respondents mentioned they did not like the colour scheme. One respondent described the colour as "putrid", whereas another claimed it was "So NHS" - implying it is something formal that requires one to think about the use of their personal data and forebodes a boring, long bureaucratic process. Despite these negative opinions, respondents did not suggest the colour would impact their decision to take part. While some

respondents mentioned that they favoured brighter, more cheerful colours such as pink and purple these colours may be less appealing to others. Given it is near impossible to find a colour scheme that appeals to everyone, it is perhaps preferable to retain a neutral colour scheme given it is unlikely to actively put respondents off completing the survey.

However, there was one major usability issue with the gold colour scheme relating to the instruction text beneath the main question text. Due to its similarity to the background colour, it was often missed as respondents began to progress through the questionnaire, naturally hastening the reading or beginning to skim read. As a result, routing and question instructions were occasionally missed. Outside of the testing environment, this issue may be exacerbated, as respondents are likely to complete the questionnaire in an informal setting such as on the sofa or whilst multi-tasking (e.g., watching TV) and may have their full attention impaired. Therefore, the contrast between the instruction text and background colour should be increased.

### **Recommendations:**

- For the instruction wording and question numbers: Use a slightly darker gold shade, or perhaps return to black/bold.
- For the overall colour scheme, we recommend continuing with a neutral gold colour palette. While some respondents did not like the colour, they did not suggest it impacted their desire to take part and it is difficult to find a colour which pleases all respondents.

## **2.8 General feedback**

Fortunately, respondents enjoyed the process of completing the questionnaire. It was often described as “quick and easy”, with the questionnaire viewed as relatively straightforward to complete and containing questions that were engaging. The questionnaire was compared favourably to other questionnaires or forms respondents had completed in the past. One respondent even asked to take the questionnaire home with them after completing it. Overall, this suggests we should expect to see a low drop-out rate for respondents who begin the paper questionnaire.

The combination of being relatively short, easy and engaging meant that respondent felt they would be highly likely to complete the questionnaire if they were to receive a postal invitation to complete the survey. This was echoed by an elderly respondent who had significant visual impairments, requiring a magnifying glass and plenty of time, who stated they would complete the questionnaire despite it taking them close to two hours to finish. One respondent did comment on the length of the questionnaire, stating that “20 mins is a long time”, but that they would have completed the questionnaire regardless.

One concern mentioned by respondents was whether the return postage was prepaid. They explicitly mentioned that this would change their willingness to complete the survey, as understandably they would not be willing to pay for a stamp to return the questionnaire. While the accompanying letter mentions the postage is paid, it should also be noted on at the end of the questionnaire.

### **Recommendations:**

- Amend sentence on back page to reference pre-paid postage: 'Please return the completed questionnaire in the pre-paid envelope provided'.
- No further issues

**Table 2: Question specific findings**

The table below contains issues that arose spontaneously in relation to specific questions, for example in relation to the wording or response options.

Question	Issue	Recommendation
Q30	Disconnect between the question wording (which doesn't make sense on its own) and the items in the grid below.	Change wording to 'How much do you agree or disagree that ... The arts and cultural facilities, groups, events and activities available in my local area...'
Q50/Q51	Respondents didn't always realise the open ended question (Q51) was single-coded, so the "other" box was treated as a multi-code option  Additionally, one respondent wanted to code 'Black British' but the only answer options were African, Caribbean or Any other Black or African or Caribbean background. They found this confusing as the subheading mentioned "Black / African / Caribbean / Black British", yet there is no specific option for "Black British". The respondent would have to code this as 'Any other Black or African or Caribbean background' then type in their response at Q51	Given the importance of allowing respondents to self-define ethnicity, if they do not feel the options at Q50 adequately describe their ethnicity, we don't feel we should restrict answers to the open-ended text box to a single option (Q51)  Q50 is a harmonised question but we feel it is important to highlight these findings to ONS to help aid further development of these questions, as we are aware they are currently under review. Another option is to ask national identity before ethnicity as it allows respondents to express their identity as British, English, Northern Irish, Scottish, Welsh irrespective of their ethnic group.