

Scaling Tip Sheet

What is Scaling?

Scaling is the process of designing the set of response options to a survey question, and the assignment of numerical values to these responses (for example, 1 through 5, with 1 representing “Strongly Disagree” and 5 representing “Strongly Agree”).

The Importance of Scaling

In cultural programs, valuing and perception are everything. So when you resort to that familiar research tool, the multiple-choice survey question, it is absolutely essential that you craft it in the best way possible to faithfully, accurately, and fully gauge how people think and feel about a program, project, or service. While the commonsense approach based on familiarity is to use a scale of five response options, this may not in fact be ideal. The research literature is inconclusive: while researchers have extensively studied the effect of different types of scales, there is no consensus.

Scaling and Context

Instead, the answer appears to be bound by context, and how many response options you should place in your survey depends on several things:

- Characteristics of the persons being surveyed, including their age level and familiarity with the subject
- The type of scale. Is it an attitude scale, an opinion scale, a value or degree of satisfaction scale, or some other variation?
- Your data needs. Do you need to encourage respondents to take a stand on some controversial topic by choosing between options?
- The data analysis methods you will use. Will you compute means, frequencies, or percentages?

Some General Rules

Based on your situation, the following may serve as general rules:

A **three-point scale** is adequate for some purposes, particularly with young children, or if your data needs are simple.

A four-point scale tends to force a choice among a

narrow range of options and may alienate some respondents. Moreover, it may induce bias because of respondents' unwillingness to choose a negative rating. Exception: If the choices are categories, and there are naturally four, then a four-point scale makes sense, as in the following hypothetical scale for gauging community outreach:

1	Absent. No evidence exists of community outreach.
2	Beginning. Some initial outreach efforts are evident.
3	Practicing. Community outreach is an ongoing practice.
4	Embedded. Community outreach is built into the organization's mission.

While a **five-point scale** tends to avoid some of the problems of its predecessor, it has several other drawbacks. The middle or neutral option may indicate either "no opinion," "undecided," or "do not know." This ambiguity of the middle term renders data analysis less meaningful. Moreover, respondents may tend to circle two adjacent numbers to indicate an intervening value—a potential headache in data analysis. Given these caveats, it is still very useful and is probably the most commonplace.

A **six-point scale** is moving toward the ideal. By lacking a middle term, it practically forces some kind of commitment toward one end or the other. For attitude or opinion surveys, it is the recommended choice—accompanied, if you wish, by an additional response option off to the right that says "No Opinion" or "Do Not Know." This allows the respondent to opt out if he or she actually lacks sufficient knowledge to make a choice.

A **seven-point scale** is also very useful. Unlike its predecessor, it provides a neutral middle term. For this reason, it is recommended for scales that assess values, satisfaction, or perceived quality.

Eight-point scales or higher do not appear to provide additional data and may be confusing, so they are not recommended.