



Office of the President of the Philippines
GOVERNANCE COMMISSION
FOR GOVERNMENT OWNED OR CONTROLLED CORPORATIONS
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MS. WANDA CORAZON TULFO-TEO

DOT Secretary and Chairperson

MR. CESAR D. MONTANO

Chief Operation Officer (COO)

TOURISM PROMOTIONS BOARD (TPB)

4/F Legaspi Towers, 300 Roxas Boulevard,
Manila

**RE: STANDARD GUIDELINE ON THE CONDUCT OF
CUSTOMER SATISFACTION SURVEY OF THE
GOCCs UNDER THE JURISDICTION OF GCG**


Dear Secretary Tulfo-Teo and and COO Montano,

This is to formally transmit a copy of the standard guideline which will govern the GOCCs in the conduct of the annual customer satisfaction survey as part of the GOCCs commitment under the 2018 Performance Scorecard. The standard guideline contains the following:

1. Standard methodology on the conduct and administration of the survey instrument, data encoding and processing, analysis as well as the research or project team and composition is provided to ensure a more organized and efficient implementation (see **Annex A**); and
2. Standard questionnaire for the prescribed methodology.

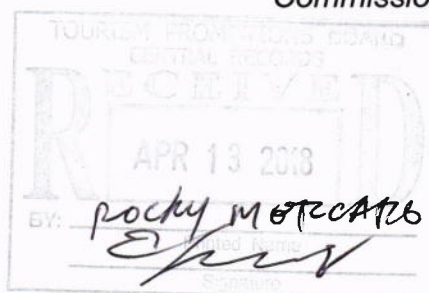
FOR COMPLIANCE.

Very truly yours,


SAMUEL G. DAGPIN, JR.
Chairman


MICHAEL P. CLORIBEL
Commissioner


MARITES C. DORAL
Commissioner



STANDARD METHODOLOGY FOR THE CONDUCT OF THE CUSTOMER SATISFACTION SURVEY

I. QUANTITATIVE RESEARCH DESIGN

GOCCs will utilize a quantitative research methodology to conduct their Customer Satisfaction Survey. Quantitative research is considered stable from beginning to end and is subject to statistical assumptions and conditions as numerical values are assigned to responses. The Customer Satisfaction Survey will be in the form of a structured pen-and-paper questionnaire, which will be administered by trained field interviewers. GOCCs are expected to hire a third-party provider to administer the survey, generate, and interpret the result. GOCCs may opt not to hire a third-party only upon approval from the GCG however, the same guidelines provided below should be followed.

II. DATA GATHERING METHODS SPECIFIC TO THE DIFFERENT TYPES OF GOCCS

To create a standard research design for the Customer Satisfaction Survey, the GOCCs had to be grouped into sectors based on similarities in the following factors:

- (a) Objectives/mandate
- (b) Nature of business
- (c) Products/services being offered
- (d) Nature of customers

Customers can be categorized as primary or secondary. Primary customers are those with direct economic transactions with the GOCC, while secondary customers are external customers who are or may be affected by business though they are not directly engaged with the economic transactions of the GOCC. For this purpose, the survey instrument only covers primary customers.

Having considered these factors, the GOCCs were grouped into five (5) data gathering methodologies, which were deemed as the most efficient and effective way of reaching the GOCCs' customers during the survey fieldwork. The five (5) methodologies are as follows:

- (a) Method A: Intercept Interviews
- (b) Method B: Telephone Interviews
- (c) Method C: Intercept Interviews + Telephone Interviews
- (d) Method D: Door-to-Door Interviews + Telephone Interviews
- (e) Method E: Intercept Interviews + Door-to-Door Interviews

1. Data Gathering Method A: Intercept Interviews

Intercept interviews, also known as exit interviews, are conducted by intercepting possible respondents during their visit to a venue and asking whether they are willing and able to participate in a short survey. This interview will be conducted in either the office/branch of the GOCCs, which the customers

visit or in the area where they operate, e.g. airports, ports, train stations, among others.

2. Data Gathering Method B: Telephone Interviews

Telephone interviews are the most efficient way of reaching customers who do not usually visit the offices/branches of the GOCCs. The customers to be contacted will come from the GOCC's list of clients which comprises different individuals, such as corporations, non-profit organizations such as social enterprises and cooperatives, as well as individuals. Using this methodology, the list from the GOCC should have the complete contact information of the possible respondents including names and contact details.

3. Data Gathering Method C: Intercept Interviews + Telephone Interviews

This combined methodology will be used for GOCCs which service both businesses/organizations and individual customers. The intercept interviews with individual customers will be conducted in the GOCC's office/branch or in areas where they operate, e.g. banks, airports, ports, among others. For business/organization customers, the interviews will be done via telephone interviews.

4. Data Gathering Method D: Door-to-Door Interviews + Telephone Interviews

The GOCCs under this group service both businesses/organizations and individual customers who can only be reached at home, hence a combination of door-to-door and telephone interviews will be most efficient. Door-to-door interviewing is the most popularly used methodology in research survey data gathering, where respondents will be interviewed at their home. This method will be most efficient for customers of GOCCs with no contact details available or are not reachable via other means of communication. However, this assumes that the communities or areas where the customers reside can be properly identified.

5. Data Gathering Method E: Intercept Interviews + Door-to-Door Interviews

The GOCCs under this group service both businesses/organizations and individual customers who can be interviewed in the GOCC's office/branch or in communities where they operate. Again, this assumes that the area or community where the individual customers are should be identified, as well as the contact details of the businesses/organizations.

III. SAMPLING PROCEDURE

Since this Customer Satisfaction Survey is quantitative, the selection of respondents will be done using probability sampling to ensure that the sample is representative of the customer population. There are several types of probability sampling which include multi-stage random sampling, systematic random sampling, and cluster sampling.

1. Sampling Procedure for Method A: Intercept Interviews

The technique in selecting respondents to be interviewed via intercept or exit interview is multi-stage random sampling, which will involve several sub-types of random sampling techniques, particularly *lottery or fish bowl technique* and *systematic sampling technique*.

Multi-stage random sampling for intercept interviews:

Stage 1: Selection of PSUs via fish bowl technique

- Step 1: Create a list of PSUs
- Step 2: Identify the number of PSUs to cover
- Step 3: Select the PSUs randomly
- Step 4: Determine the schedule of the survey

If the GOCC has more than one venue where the survey can be conducted, the first step is to select which primary sampling unit (PSUs) to cover. PSUs may refer to venues such as offices or branches of the GOCCs which customers frequent to avail of the service. It may also refer to events or trainings held by the GOCCs such as by DAP or by CCP.

Ideally, all PSUs should be covered but due to time and budget constraints, a random selection can be done using lottery or fish bowl technique. This is a random sampling technique where a complete list of PSUs is generated and a pre-identified number of PSUs are randomly selected. For GOCCs with only a few offices, branches or events (i.e. 5 or less), all PSUs should be covered. For example, if DAP is holding only 2 events during the fieldwork period, then both events should be covered).

Once the PSUs have been identified, the day of the week and the time of the day must also be established prior to fieldwork. The identification of this research schedule will be based on the best judgment of the researcher and should be agreed between the researchers and the GOCCs. Basic rule is that the spread of the day and time will ensure that all possible segments of the population are represented and gets equal chance of getting selected to participate in the survey.

Stage 2: Selection of respondents via systematic sampling technique

- Step 1: Identify the population and sample size
- Step 2: Compute for sampling interval number
- Step 3: Select the respondents using interval number
- Step 4: Proceed with interview

Once the PSU has been identified, systematic sampling technique will be utilized in the selection of the actual respondents to be interviewed. In this

technique, the researchers identify a sampling interval number (population size¹ / target sample size²).

The sampling interval number will be used to determine which of the exiting customers will be invited to participate in the survey. For example, if the sampling interval number is 10, every 10th customer will be asked to participate.

In the event where the selected customer does not meet the required recruitment criteria, if any, or is not willing to participate in the survey, the field interviewers can just replace him/her by inviting the next exiting customer to participate. There is no need to skip and count for the nth customer again.

Note that for systematic sampling technique, aside from the sampling interval number, a random start number should also be identified.

2. Sampling Procedure for Method B: Telephone Interviews

For the telephone interviews, the selection of the respondents will be done using systematic sampling technique using a customer list (to be provided by the GOCC). The customer list must be complete with customer name and correct/updated contact details.

Systematic sampling technique for telephone interviews:

- Step 1: Create a contact list
- Step 2: Identify population and sample size
- Step 3: Compute for sampling interval number
- Step 4: Select the respondents using interval number
- Step 5: Contact respondents for the interview

In this technique, the researchers should identify a sampling interval number (population size / target sample size).

- The population size refers to the number of customers in the list and the target sample size refers to the desired number of interviews to be completed for the project. Using this technique, the customers get equal chance of getting selected to participate in the interview.

The sampling interval number will be used to determine which of the customers in the list will be invited to participate in the survey. For example, if the sampling interval number is 10, every 10th customer in the list will be contacted and invited.

Note that for systematic sampling technique, aside from the sampling interval number, a random start number should also be identified.

¹ The population size refers to the estimated number of customers who will be visiting the venue in a given day. For example, the population size for a training conducted by DAP is the number of confirmed attendees in a particular training. Another example, the population size for an event conducted by the CCP is the estimated number of people who will participate in the event.

² The target sample size, on the other hand, is the desired number of interviews to be completed in a day per PSU.

In the event where the selected customer does not meet the required recruitment criteria, if any, or is not willing to participate in the survey, the field interviewers can just replace him/her by calling the next customer in the list to participate. There is no need to skip and count for the nth customer again.

In the event where the customer is not available or cannot be reached, a maximum of two (2) callbacks will be made. If at the second callback, the customer is still not available or cannot be reached, the customer should be replaced by calling the next customer in the list.

3. Sampling Procedure for Method C: Intercept Interviews + Telephone Interviews

The sampling technique to be used for this methodology is similar to what has been previously discussed in data gathering methods A and B, i.e. multi-stage random sampling for the intercept interviews and systematic random sampling for the telephone interviews.

Multi-stage random sampling for intercept interviews:

Stage 1: Selection of PSUs via fish bowl technique

- Step 1: Create a list of PSUs
- Step 2: Identify the number of PSUs to cover
- Step 3: Select the PSUs randomly
- Step 4: Determine the schedule of the survey

Stage 2: Selection of respondents via systematic sampling technique

- Step 1: Identify the population and sample size
- Step 2: Compute for sampling interval number
- Step 3: Select the respondents using interval number
- Step 4: Proceed with interview

Systematic sampling technique for telephone interviews:

- Step 1: Create a contact list
- Step 2: Identify population and sample size
- Step 3: Compute for sampling interval number
- Step 4: Select the respondents using interval number
- Step 5: Contact respondents for the interview

4. Sampling Procedure for Method D: Door-to-Door Interviews + Telephone Interviews

The telephone interviews will be done as has been discussed in the previous section under data gathering Method B, which is systematic sampling technique.

Systematic sampling technique for telephone interviews:

- Step 1: Create a contact list

- Step 2: Identify population and sample size
- Step 3: Compute for sampling interval number
- Step 4: Select the respondents using interval number
- Step 5: Contact respondents for the interview

Multi-stage random sampling for door-to-door interviews:

For the door-to-door interviews, a multi-stage random sampling technique will be utilized and this will involve several sub-types of sampling such as *cluster sampling* and *systematic random sampling*. This sampling assumes that the GOCCs can identify the areas where their customers reside.

- i. If the residences of the customers of a GOCC are concentrated in more than one primary sampling unit (PSU), the first step is to select which PSU to cover. PSU may refer to community or barangay. Ideally, all PSUs should be covered but due to time and budget constraints, a random selection of PSUs can be done using cluster sampling.

Stage 1: Selection of PSUs via cluster sampling

- Step 1: Create a list of PSUs
- Step 2: Identify the number of PSUs to cover
- Step 3: Select the PSUs randomly

To ensure a random selection, a complete list of all the PSUs have to be generated and a pre-identified number of PSUs are randomly selected.

- ii. The next stage is the selection of households to be interviewed via systematic random sampling. Two situations need to be considered: a) one is that there are some GOCCs which have a list of their customers who can be located in certain communities or barangays; b) another situation is that some GOCCs do not have a list but their customers are concentrated in certain communities or barangays.

Stage 2A: Selection of households from a list via systematic random sampling

- Step 1: Create a contact list
- Step 2: Identify population and sample size
- Step 3: Compute for sampling interval number
- Step 4: Select the respondents using interval number
- Step 5: Proceed to respondents' house for the interview

If there is a list and after the PSUs have been identified, the customers in the selected PSU will be identified using systematic random sampling. First, the researchers have to identify a sampling interval number (population size³ / target sample size).

³ The population size refers to the number of customers in the list for a particular PSU and the target sample size refers to the desired number of interviews to be completed in that particular PSU.

Using this technique, the customers get equal chance of getting selected to participate in the interview.

The sampling interval number will be used to determine which of the customers in the list will be invited to participate in the survey. For example, if the sampling interval number is 10, every 10th customer in the list will be contacted and invited.

In the event where the selected customer does not meet the required recruitment criteria, if any, or is not willing to participate in the survey, the field interviewers can just replace him/her by calling the next customer in the list to participate. There is no need to skip and count for the nth customer again.

Note that for systematic sampling technique, aside from the sampling interval number, a random start number should also be identified.

Stage 2B: Selection of households without a list via systematic random sampling

Step 1: Identify the socioeconomic class of the neighborhood

Step 2: Determine the interval number

Step 3: Select the household using interval number

Step 4: Proceed to the selected household

If the GOCC doesn't have a list of customers but have identified the PSUs to cover, the selection of the households will be done via systematic random sampling. As a standard, the number of households to interview in each PSU is 10. This will ensure consistency throughout the PSUs and ensure widespread coverage since more PSUs need to be selected. For example, if the desired sample size is $n=300$ then 300 households needs to be divided with 10 households per PSU. In which case, 30 PSUs should be selected.

Once the PSUs have been selected, a random start has to be identified, usually a street corner, and from there, the sampling interval number will be used to select the households.

As a standard, the following sampling interval numbers have to be used according to the socioeconomic class of the neighborhood:

- ABC1 neighborhood – no intervals
- C1C2 neighborhood – interval of 3
- C2D neighborhood – interval of 6
- DE neighborhood – interval of 10

For example, if the neighborhood is predominantly C2D, the field interviewers should use a sampling interval number of 6, which means they have to skip 5 houses and go to the 6th house.

- iii. The third stage in the multi-stage sampling for door-to-door interviews is the selection of respondents within a household.

Stage 3: Selection of respondents within a household via purposive or random sampling

Step 1: Identify qualification of respondents

Step 2: Randomly select via last birthday method or Kish Grid

Step 3: Proceed to interview the selected respondent

The selection of the respondent within the household can be done purposively or randomly. If only one respondent qualifies per household, then purposive sampling will be utilized.

If there are more than one respondent who can qualify to participate in the survey within a household, then random selection needs to be done. The usual techniques used in the Philippines are the last birthday method or the Kish Grid.

In case the respondent is not willing to be interviewed, the field interviews can go to the next household. In the event where the respondent is not available or not at home, a maximum of two (2) callbacks will be made. If at the second callback, the respondent is still not available or not at home, the respondent should be replaced by going to the next household.

5. Sampling Procedure for Method E: Intercept Interviews + Door-to-Door Interviews

The sampling technique to be used for this methodology is similar to what has been previously discussed in data gathering Methods A and D, which is multi-stage random sampling for both intercept interviews and door-to-door interviews.

Multi-stage random sampling for intercept interviews:

Stage 1: Selection of PSUs via fish bowl technique

Step 1: Create a list of PSUs

Step 2: Identify the number of PSUs to cover

Step 3: Select the PSUs randomly

Step 4: Determine the schedule of the survey

Stage 2: Selection of respondents via systematic sampling technique

Step 1: Identify the population and sample size

Step 2: Compute for sampling interval number

Step 3: Select the respondents using interval number

Step 4: Proceed with interview

Multi-stage random sampling for door-to-door interviews:

Stage 1: Selection of PSUs via cluster sampling

Step 1: Create a list of PSUs

Step 2: Identify the number of PSUs to cover

Step 3: Select the PSUs randomly

Stage 2A: Selection of households from a list via systematic random sampling

- Step 1: Create a contact list
- Step 2: Identify population and sample size
- Step 3: Compute for sampling interval number
- Step 4: Select the respondents using interval number
- Step 5: Proceed to respondents' house for the interview

Stage 2B: Selection of households without a list via systematic random sampling

- Step 1: Identify the socioeconomic class of the neighborhood
- Step 2: Determine the interval number
- Step 3: Select the household using interval number
- Step 4: Proceed to the selected household

Stage 3: Selection of respondents within a household via purposive or random sampling

- Step 1: Identify qualification of respondents
- Step 2: Randomly select using last birthday method or Kish Grid
- Step 3: Proceed to interview the selected respondent

IV. DATA COLLECTION

The data collection will be done by trained field interviewers along with their field supervisors using a structured pen and paper questionnaire. It will take place in the venue conducive to interviewing such as the respondents' homes or offices. The area coverage, instrument, length of interview, and quality control procedures are discussed in this section.

1. Respondent Criteria

Depending on the nature of the GOCC's customers, the respondents should satisfy **at least one** of the criteria below:

- (a) Current/on-going customers of the GOCC
- (b) Has a current/active account with the GOCC
- (c) Had at least one transaction with the GOCC during the time of visit

The final criterion to be followed should be included in the screener portion of the questionnaire and should be clear among the interviewers.

2. Sample Universe

For methodologies which require a list of customers, the sample universe should be provided to the researchers beforehand so they can conduct the systematic selection.

This sample universe refers to the names of the customers with their telephone numbers (for phone interviews) and addresses (for door-to-door interviews).

To ensure the confidentiality of the lists, the researchers and all their partners should sign a Non-Disclosure and Confidentiality Agreement which contains the following items:

- (a) The list should only be used for the purposes of this particular customer satisfaction survey and should not be shared with anyone who is not involved in the project.
- (b) The masterlist should only be provided to the researcher who will be doing the systematic selection. All field interviewers should only be provided with the list of customers that they will be contacting.
- (c) The list should be disposed of properly or returned to the GOCC. No copies of the list, be it printed or in soft copy formats, should be left with the third-party agency.

Before the launch of the project, the GOCCs should inform their customers that a third-party agency will be contacting them to conduct a Customer Satisfaction Survey. In case customers cannot be reached, an official letter coming from the GOCC informing them about the survey should be provided to the interviewers. This official letter should include the following but not limited to:

- (a) Information about the third-party agency and what they will be conducting
- (b) Purpose of the research
- (c) Invitation of customers to participate in the survey
- (d) Assurance of confidentiality

3. Sample Size

Determining the sample size depends largely on the population of the universe, the desired margin of error (MOE) and desired confidence level. The formula to compute for a sample size is as follows:

$$\text{Sample size} = \frac{\frac{z^2 \times p(1-p)}{e^2}}{1 + \left(\frac{z^2 \times p(1-p)}{e^2 N}\right)}$$

Where $z = 1.96$ at 95% confidence level

N = target universe or population i.e. active customer base of the GOCC

e = desired margin of error in decimal form

p = sample proportion

However, in practice, it is very rare for such computations to be used to determine sample sizes. Instead, market researchers use a combination of rules of thumb, area coverage, budget constraints, time limitations, availability of resources, and understanding of client's need for accuracy when working out the sample sizes.

- a. For this Customer Satisfaction Survey, a sample size of n=300 is enough to yield a MOE of $\pm 5.6\%$ at 95% confidence level. This sample size can be used for GOCCs where the customers are highly concentrated in specific areas. For example:
 - Metro Manila only
 - Not more than 30 small communities/barangays
 - Not more than 3 regions
- b. However, if the sample needs to be more geographically spread out such as nationwide coverage, a sample size of n=500 is recommended. A sample size of n=500 will yield a MOE of $\pm 4.3\%$ at 95% confidence level. This sample size can be used for GOCCs where customers are more geographically spread out. For example:
 - Metro Manila and other key cities nationwide such as Cebu and Davao
 - More than 30 small communities/barangays
 - More than 3 regions
- c. If sub-segments need to be read, the researcher must ensure that these sub-segments have at least n=100 (MOE of $\pm 9.8\%$ at 95% confidence level) to be considered readable and conclusive.
- d. For GOCCs with small universes, meaning the number of customers/clients is not enough to be able to reach n=300 respondents for the survey, a sample size of n=100 should be targeted. This will yield a MOE of $\pm 9.8\%$ at 95% confidence level but should only be read at the total level. No further breakdowns can be made as the sub-segment reads will not be conclusive due to a very small sample size.
- e. For GOCCs with several types of customers, each type should be represented. For example, one GOCC may serve the general public as well as businesses. Both the general public and businesses should be represented in the sample. The sample size however, should be proportionate to the size of each customer type. For example, one GOCC has a total of 275,000 customers broken down into general public and businesses as follows:

Total number of customers – 275,000 broken down in the following:

- General public – 250,000 (91% of total)
- Businesses – 25,000 (9% of total)

With the figures above, the general public has 91% proportion to the total number of customers and businesses make up 9% hence the sample should also be divided using the same proportions as follows:

Total number of customers – n=500

- General public – n=455 (91% of total)
- Businesses – n=45 (9% of total)

4. Frequency of Data Collection

In order to properly monitor the GOCCs' customer satisfaction rating, the Customer Satisfaction Survey has to be conducted at a pre-identified frequency in a year. The frequency can be determined by considering several factors:

- Number of customer base in a given year
- Frequency of transactions and service availment per customer
- Budget, time and other resources

Number of Customers in a Given Year	Frequency of changes in strategies and marketing activities	Frequency of transactions and service availment per customer	FREQUENCY of conducting the survey
More than 250,000	2 or more times a year	2 or more times a year	BI-ANNUAL
250,000 or less	Once a year or less often	Once a year or less often	ANNUAL

5. Area Coverage

Primary area coverage for the study depends on where the customers of the GOCCs can be contacted and interviewed. For example, if the GOCCs' customers are primarily in Metro Manila, then the area coverage will only be Metro Manila. If, on the other hand, the GOCCs customers can be located nationwide, then the study should cover the entire Philippines.

6. Data Collection Instrument

Since this Customer Satisfaction Survey will be done quantitatively, the study will make use of a structured pen and paper questionnaire, which will ensure consistency all throughout the project and with the least possible interviewer bias. This questionnaire ensures:

- More rigid style of interviewing
 - Close-ended and open-ended questions will be present
 - Highly structured way of questioning
 - Numerical values are assigned to responses
- a. The questionnaire is composed of two (2) sections:
- (a) Screener
 - (b) Main questionnaire
 - Overall satisfaction/dissatisfaction rating
 - Reasons for satisfaction/dissatisfaction rating given
 - Factors to satisfaction/dissatisfaction

GOCCs may opt to include another section to reflect specific questions related to its other products or services without the need for authority from GCG. However, questions under screener and main questionnaire are fixed and may not be altered without prior approval from the GCG.

- b. To ensure understandability and ease of administration, the Customer Satisfaction Survey questionnaire needs to have:

- i. Indication if single answer (SA) or multiple answer (MA)

This indication is usually written at the end of the question for the field interviewers to easily see. This will guide the field interviewer to encircle only one response or more than one response, depending on the kind of answer that the question is looking for. Questions with pre-coded responses such as *gender*, *age*, *socio-economic classification*, *satisfaction rating*, *frequency of activities*, and *activity done most often* are single answer items. Multiple answer questions, on the other hand, are the likes of *activities/transactions* and *reasons for satisfaction*.

- ii. Instruction if response should be aided or spontaneous

Depending on the objective and nature of the question, some would need for responses to be aided and some need spontaneous answers. Aided responses are usually needed when the answer has to be exhaustive and complete. To be able to ensure that respondents do not miss out answers, they should be provided with a list or a showcard. Unaided or spontaneous responses are needed when the respondent's top-of-mind is sought for or if biases are aimed to be minimized.

This instruction will be indicated before the question so that the interviewers would know whether to hand out a showcard and read out a list or not prior to asking the question.

- iii. Skipping instructions

There are several questions in the questionnaire where a certain answer is required to proceed to another set of questions. For example, before moving on to the set of questions *about reasons for dissatisfaction*, the respondent must first say that he/she is dissatisfied with the service. Otherwise, if the respondent is satisfied with the service, the reason for dissatisfaction will be skipped and the interviewer will proceed to the next question.

These skipping instructions and consistency checks have to be explicitly indicated in the questionnaire to guide the interviewer in administering the interview.

- iv. Consistency checks

Consistency checks, on the other hand, are ways to identify whether there is logic in what the respondent is saying. Similar to skipping

instructions, consistency checks should be explicitly stated in the questionnaire to ensure that these kinds of logic checks will not be missed out and left unclear.

Ideally, consistency checking has to be done during the interview. Otherwise, if the interview has already been done when the inconsistency has been found, the interviewer will have to call or go back to the house of the respondent to clarify.

v. Proper question phrasing with corresponding translation

Since this is a structured interview, the questionnaire has to have proper question phrasing so that interviewers will not paraphrase or construct sentences on their own. Translated questions should also be included and placed at the topmost portion of the question. English translations will be kept at the bottom as this will least likely be used during the interview proper.

vi. 5-point Likert scale for all rating questions with proper labels and explanations

A 5-point Likert scale should be used for all rating questions so that respondents are able to pinpoint their level of satisfaction/dissatisfaction.

The use of either 5-point, 7-point, or 9-point scales do not necessarily confer any absolute recommendation favoring one approach over the other. However, one study showed a slight support to use a 7- and 9-point scale among respondents with more cognitive ability and 5-point scale among general public. Also, a 5-point scale allows respondents to pick a neutral answer, as opposed to a 4-point scale. Hence, for this customer satisfaction survey, a 5-point scale will be utilized:

Very satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very dissatisfied
5	4	3	2	1

The labels should also be followed as shown above. There should be two spectrums – positive where *very satisfied* and *satisfied* are, and negative where *very dissatisfied* and *dissatisfied* are.

It is highly recommended that the explanation of the scale should be read out to the respondents while showing them the showcard of the scale. This should be done before any of the rating questions are asked. Every now and then, the interviewers should explain the scale again until the respondent gets used to it.

Below are the explanations of each point in the scale:

Very satisfied	Performance of the GOCC meets and exceeds their needs and expectations to their benefit. The service was provided with few minor problems or none at all. If there were few minor problems, a corrective action might have already taken place which is deemed highly effective.
Satisfied	Performance of the GOCC meets the minimum expectations from the customer. The service was provided with few minor problems or none at all. If there were few minor problems, a correction action might have already taken place which is deemed highly effective.
Neither satisfied nor dissatisfied	This is the midpoint in which the respondents cannot truly pick a side in the spectrum but this does not mean that the respondent has no opinion or does not know. Performance of the GOCC neither meets nor doesn't meet the minimum expectations of the customer.
Dissatisfied	Performance of the GOCC does not meet the minimum expectations from the customers. There are a number of elements or aspects in the GOCC's customer service that reflects a problem for which the GOCC has not yet identified corrective actions. If there were corrective actions, then the action is perceived by the customer as not effective or has not been fully implemented to be effective.
Very dissatisfied	Performance of the GOCC does not meet most or did not meet any of the expectations from the customers. There are a number of elements or aspects in the GOCC's customer service that reflects a serious problem for which the GOCC has not yet identified corrective actions. If there were corrective actions, then the action is perceived by the customer as very ineffective or has totally been disregarded.

7. Length of Interview

The length of the interview will be at most 15 minutes. This is the ideal maximum duration for the Customer Satisfaction Survey, particularly if one of the methodologies are telephone interviews or intercept interviews. Lengthy questionnaires often result to higher refusal rate. Also, because respondents easily get tired and annoyed with long interviews, they might opt to discontinue from answering the survey.

For door-to-door interviews, a more lengthy questionnaire can be accepted but should not exceed 45 minutes.

The actual length of interview will be determined during the pilot test of the questionnaire. Should the questionnaire be longer than 15 minutes, the information coverage will be reviewed and checked for prioritization of questions.

8. Data Collection Checklist

Each field interviewer should have the following items with them during the data collection in the field:

Call sheet	<p>This is where the field interviewers note the results of the calls or all door knocks made during the entire data collection period, whether the respondent is qualified or not. This document contains the following information:</p> <ul style="list-style-type: none"> • Customer name • Phone number (telephone interviews) • Address (door-to-door interviews) • Result of the call or door knock (e.g., no answer, no person in the house, respondent not willing to participate, quota met, etc.) • Socio-demographic information of qualified respondent • Whether qualified respondent is original or replacement
List of customers (if available)	<p>This should contain the complete names, contact numbers and addresses of customers that have to be interviewed in the assigned PSU of the field researcher. However, to ensure confidentiality of the list, the interviewers should only hold the list that they need to contact. The masterlist should only be provided to the researcher who will be doing the sampling.</p>
Official invitation letter from GOCC	<p>This should contain at least the following items:</p> <ul style="list-style-type: none"> • Information about the third-party agency and what they will be conducting • Purpose of the research • Invitation of customers to participate in the survey • Assurance of confidentiality <p>This will help assure customers that the survey is legitimate and official, which will in turn boost the willingness of the customers to participate.</p>
Screeners	<p>This should be separated from the main questionnaire and will only be attached to the main questionnaire if the respondent is qualified.</p>
Main questionnaire	<p>This is the final questionnaire approved by GCG.</p>
Showcards	<p>These are cards that will be shown to respondents for questions with aided responses. Each interviewer should have a complete set of showcards. All pages should be clearly printed out and placed in a clearbook for ease of administration and to ensure that no page will be misplaced or lost.</p>

Briefing document	The briefing document used during the briefing of field interviewers contains the background of the study and pertinent instructions. This should be brought by the field interviewers with them during the data collection period in case they need it for reference.
Clearing/de-briefing document	In addition to the briefing document, all interviewers should also have with them a clearing/de-briefing document, which contains all additional instructions that have been relayed to them during the clearing/de-briefing session.
Identification cards (IDs)	All interviewers should have proper identification with their complete name and the name of their company. These IDs should be visible at all times while data collection is in progress.

9. Data Collection Quality Control

To be able to ensure that the data gathered from the Customer Satisfaction Survey is of highest quality possible, the following quality control procedures should be set in place:

- a. A training will be conducted together with the interviewers to:
 - Train them on sampling procedure and selection of respondents;
 - Brief them on the questionnaire administration;
 - Practice skipping and routing of questions;
 - Do mock interviews amongst themselves to familiarize themselves with the questions and to test their comprehension of the instructions.
- b. A briefing document should be provided by the researcher to ensure that all instructions relayed during the briefing are documented.
- c. The questionnaire must be pilot-tested prior to actual fieldwork to ensure clarity and comprehension, to check for bias, and to assess interview length. The questionnaire should be pilot-tested with at least three (3) respondents per methodology. However, these respondents should no longer be included in the sample during the actual interviews.
- d. Researchers and/or team leaders will observe within the initial days of fieldwork to monitor if sampling procedures are well-understood and if the questionnaire is implemented properly.
- e. The first set of accomplished questionnaires will also be checked by the team leader or supervisor and/or researcher to check for consistency and proper filling-up of the questionnaires.
- f. Clearing/de-briefing sessions will be conducted as the need arises in order to clarify pending questions and provide additional instructions to the field

team. If the questions and instructions are minor, only the team leaders will be present. If the questions and instructions are major, the interviewers or enumerators should also be present in the clearing/de-briefing sessions. The researchers will provide a documentation of what has transpired during the clearing/de-briefing sessions in the form of a clearing/de-briefing document. All field interviewers and supervisors should have a copy of this document all throughout the data collection period for quick reference.

- g. The field manager shall conduct independent, on-the-spot checking in designated areas to ensure quality of data gathering and collection.
- h. Back-checking and spot-checking of at least 30% of the interviews will also be conducted to ensure the interviews have been conducted and completed.
 - Back-checking includes activities such as calling respondents to check whether they have been interviewed, and going through a few of the questions with them to check if their responses are consistent.
 - Spot-checking involves going to the data collection area to check on the interviewers for proper skipping, if they are indeed in the area covered by the study, or if they are interviewing correctly, among others.
- i. The questionnaires will be in English, Tagalog, and other regional languages as necessary such as Cebuano. The translated questionnaire should be administered by interviewers who are linguistically capable of speaking in the translated language.
- j. The questions should only be answered by the respondent being asked. No other person can answer the survey, except for the selected respondent.
- k. Team leaders will be strategically assigned to monitor the interviewers closely for any difficulties and questions that may arise and to ensure proper administration of the survey.
- l. Running consistency checks throughout the data will also ensure zero error in data collection and data entry prior to processing of the data tables.
- m. As part of the ESOMAR codes and guidelines, the identity of the respondents will be kept confidential from GCG or the GOCCs. If there is any requirement from GCG or the GOCC to reveal the identity of the respondents, limited only to their addresses/locations, the consent of the respondents will be sought for. However, if the respondents want to keep their locations/addresses confidential and detached from the survey results, this will be adhered to by the researcher.

V. DATA ENCODING AND PROCESSING

1. Data encoding. The encoding of the data collected from the quantitative survey will be processed as follows:
 - a. All completed questionnaires will be 100% checked by the field supervisors and editors for skipping and consistency prior to data encoding. Once the

questionnaires have been cleared and corrected by the field team, these will be sent over to the data encoders for data entry.

- b. The encoding of the data will be done using a data capture program which can incorporate validation/cleaning filters to screen valid and invalid answers based on the consistency checking of the questionnaire. Consistency checks will be done to ensure zero error in data collection and data entry prior to further processing. This validation and cleaning will include but should not be limited to duplicate checks, missing responses per question, and validation of skipping routes.
2. Data processing. The data processing and preparation of the data tables, on the other hand, will undergo the following process:
- a. Once data has reached zero error, data will be prepared for table processing.
 - b. For efficiency, an analysis plan will be prepared. The analysis plan will be the basis of the table specifications, which in turn will be utilized as a guide for the preparation of the data tables.
 - c. Data tabulation specifications or tabspecs will be developed by the researcher as reference of the data processing team. The tabspecs will include details such as table title, segments to be read in the table banners/headers, stubs, formatting of the tables, list of responses, among others.
 - d. The data table processing will involve descriptive statistics and several cross-tabulations, depending on the data requirements.
 - e. All tables will also undergo statistical tests for groups to measure the variance among the existing groups/segments in the sample. This significance testing should be done at 95% confidence level.
 - f. A sample size of at least $n=300$ on a total level (MOE of $\pm 5.6\%$ at 95% confidence level) is required for a segment to be readable and conclusive. Otherwise, if sample size does not reach this requirement, then the data will be provided for indicative or qualitative treatment only.
 - g. If there is a need to read sub-segments, the required sample size is at least $n=100$ (MOE of $\pm 9.8\%$ at 95% confidence level) to be considered readable and conclusive. Otherwise, if the sample size does not reach $n=100$, which will not yield a robust sample size, data will only be interpreted with an indicative/qualitative treatment.
 - h. Data will be weighted, as and when possible or necessary to correct any disproportionate quota applied in the study.

VI. ANALYSIS PLAN

The analysis of survey results shall be based on the analysis plan below. The analysis plan contains all the data that will be included in the presentation. The analysis should include a reading of the following segments:

- Total
- By area (for nationwide coverages)
 - Total Luzon
 - Total Visayas
 - Total Mindanao
 - By region or key city
- By customer type
 - General public
 - Businesses
- By type of service availed
- By rating
 - Positive raters
 - Negative raters

The above segments should only be read if sample size allows, meaning if segments are $n=100$ or more. If the GOCCs total sample size is $n=100$, it can only be read at a total level. For GOCCs with respondents of $n<100$, the results should be read qualitatively and only as indication.

The following analyses are the minimum required information which GOCCs need to present:

- a. Averaging of the overall satisfaction rating.
- b. Crosstabs of the reasons for overall satisfaction rating against type of raters (positive and negative) to determine top reasons for satisfaction and top reasons for dissatisfaction.
- c. Determining the derived importance by correlating the satisfaction levels of each attribute with the overall satisfaction rating. If there is a high link of correlation with an attribute, it can be inferred that the attribute is driving customer satisfaction, hence, it is an important attribute. Deriving the importance of attributes via regression analysis is deemed more accurate than asking for stated importance, particularly for attributes which people cannot rationalize or admit to in a "stated" answer.
- d. Plotting derived importance score per attribute against satisfaction score per attribute in a scatter diagram to determine where attributes will fall under. There will be four boxes in this scatter diagram, where attributes will be plotted:
 - Important and high rated
 - Important but low rated
 - Not important but high rated
 - Not important and low rated

VII. PROJECT TIMELINE AND DELIVERABLES

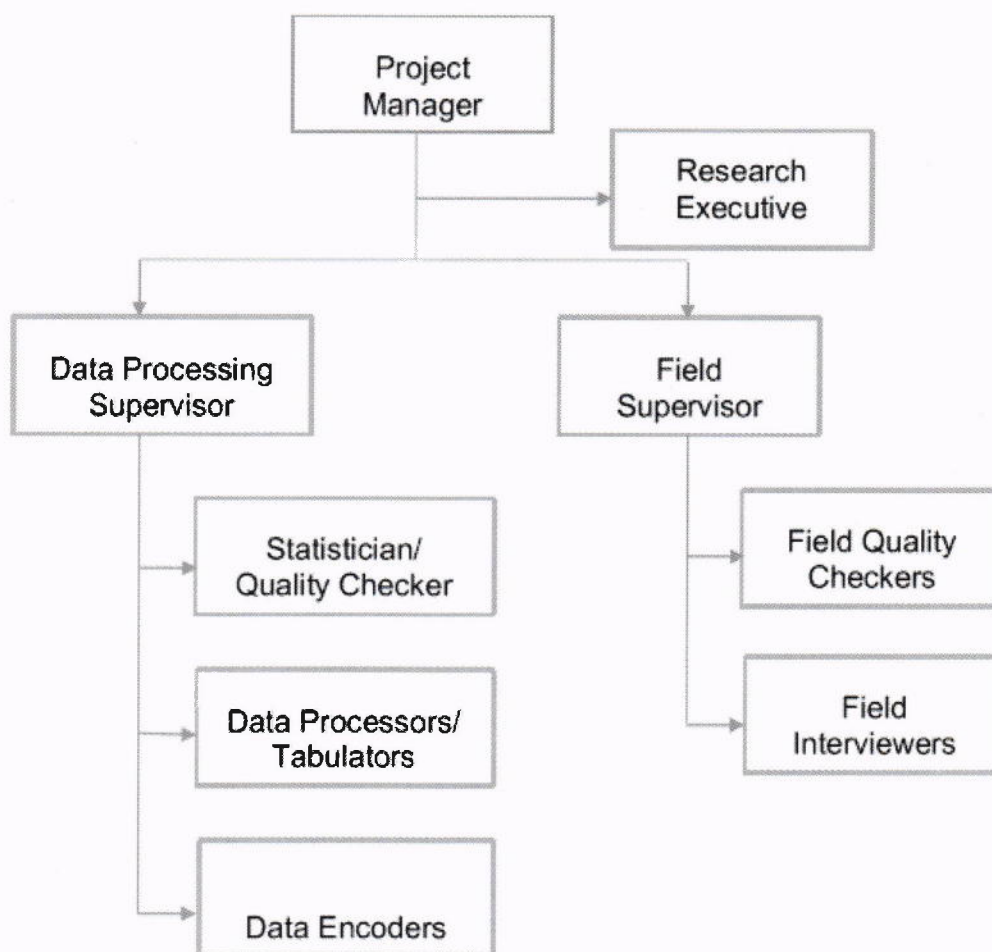
Below are the standard research activities/deliverables and the corresponding timeline that should be followed by the research team to be contracted by the GOCCs. Note that this timeline is ideal for both the annual and bi-annual survey set-up.

These activities should be finalized during the set-up at the beginning of the survey year. In case the GCG or the GOCC would like to revise the research design or make changes to questionnaire, these can be done ahead of time or on an annual basis.

Activities / Deliverables	Timeline per Sample Size		
	n=100	n=300	n=500
1. Inception meeting and discussion of sampling design, methodology, protocols and work plan	1 week	1 week	1 week
2. Review, add questions specific for the GOCC (optional), format, and translate survey instrument	1 week	1 week	1 week
3. Pilot testing of survey instrument and feedback for possible revisions (optional, if there are major additions)	2 weeks	2 weeks	2 weeks
4. Finalization of survey instrument	1 week	1 week	1 week
5. Recruit, train, and submit list of final field team to be deployed	1 week	1 week	2 weeks
6. Data collection set up (including production and preparation of fieldwork materials)	1 week	1 week	2 weeks
7. Data collection proper	1-2 weeks	2-3 weeks	3-4 weeks
8. Data cleaning and validation, and computation of descriptive statistics	2 weeks	2 weeks	3 weeks
9. Writing and submission of reports	2-3 weeks	2-3 weeks	2-3 weeks
TOTAL	12-14 weeks	13-15 weeks	17-19 weeks

VIII. RESEARCH TEAM AND STRUCTURE

The Market Research Team to be contracted or formed in case of self-administration by the GOCC should follow the structure below to promote a more organized and efficient working environment.



Designation	Role
Project Manager	The Project Manager oversees the entire project. This can be a Research Director, Associate Research Director, Senior Research Manager or Research Manager. He/she should approve the questionnaire, tabulation specifications and report and should be the one to present the research findings to the GOCC. He/She should also be present during major meetings and trainings done throughout the project.
Research Executive	The Research Executive assists the Project Manager throughout the project. He/she can be a Research Executive or Senior Research Executive. He/She can work on the questionnaire, tabulation specifications and report but with the full guidance of the Project Manager. He/She should also be present during meetings and trainings.
Data Processing Supervisor	The Data Processing Supervisor oversees all tasks related to data processing, which starts from data encoding to data processing into tables. He/She should be present during the field training and clearing/de-

Designation	Role
	briefing when all the consistency checks and cleaning instructions are relayed.
Field Supervisor	The Field Supervisor oversees all tasks related to data collection, which starts from recruitment of field team until the accomplished questionnaires have been received and deemed "clean" by the Data Processing Supervisor. The Field Supervisor should be the one to conduct the field training and should be present during the clearing/debriefing when all the data collection instructions are relayed.
Statistician / Quality Checker	The Statistician is an expert responsible for the checking of the encoding template and the data churned out by the encoders before it is passed on to the Data Processors/Tabulators. He/She will also run any statistical tests needed for the project.
Data Processor / Tabulator	The Data Processors/Tabulators are the ones responsible for running the encoded data and converting this into tabulated form.
Data Encoders	The Data Encoders are the ones responsible for encoding the answers from the accomplished questionnaires into the encoding template provided by the Statistician.
Field Quality Checkers	Field Quality Checkers, or most commonly known as Field Editors, are the ones responsible for checking the accomplished questionnaires done by the Field Interviewers. Before the questionnaires are handed over to the Data Encoders, these should be checked by the Field Quality Checkers to make sure that these follow the consistency and cleaning instructions provided.
Field Interviewers	The Field Interviewers are the ones who will interview the respondents. All of them should be present during the Field training to be conducted by the Field Supervisor.