

Online Survey Tools

Qualtrics and MTurk

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Table of contents

1. Overview of Online Survey Tools
2. Qualtrics
3. MTurk
4. In-class Exercises
5. Extra Slides - Experiments

Overview of Online Survey Tools

Why use online surveys?

- Easier data collection
- Experiments easy to implement
- Design options include branching and skip patterning
- Low labor costs

How do we create and distribute online surveys?

1. Create survey using online platform
2. Distribute survey (using another online platform)*

*Note: Online surveys are primarily distributed online – often to lists provided by sampling platforms – but many researchers doing field experiments in other countries design their experiments in Qualtrics and use tablets/iPads to administer.

Online survey platform – a browser-based software that lets you build surveys and experiments.

Why Qualtrics?

- Higher functionality compared to SurveyMonkey or SurveyGizmo.

*Word of caution: Qualtrics is SUPER expensive if you don't have a university license (most universities do, but not all).

Online sample platform – a browser-based software that lets you find survey respondents and distribute surveys.

Why Amazon Turk (MTurk)?

- Very common, especially for piloting surveys.
- Relatively cheap – cost depends on survey length but approx. 70 cents per respondent.

Other options:

- Lucid Marketplace
- Survey Sampling International (SSI)


Qualtrics


Challenge #1 - Set up your Qualtrics account!

Instructions for creating Qualtrics account:

- **Political science students** – sign up for qualtrics account using the following link:
<https://ucberkeleypolisci.az1.qualtrics.com/>.
- **Other students (NOT in political science)** – find your department's equivalent link using the following website:
<http://dlab.berkeley.edu/data-resources/qualtrics>.

Viewing Projects

 qualtrics.

ProjectsContactsLibraryHelp




×


All Projects4

> Shared with Me3


Uncategorized4

+ New Folder

 All Folders Last Modified ▾

 Create Project

Today

 Survey


Example Survey for PS239T

Modified Dec 29, 2018


NEW
Status

39
Questions

1
Languages


14 minutes
Est. Response Time

...

 Survey


Framing, Valence, and Racial Discr...

Modified Dec 29, 2018

NEW
Status


39
Questions

1
Languages


14 minutes
Est. Response Time

...

More Than 30 Days Ago

 Survey

Midsemester feedback 109Z 2018

Modified Oct 9, 2018


ACTIVE
Status

13
Questions

245
Responses

.....
12 Day Trend

...

 Survey

Class survey 2018

Modified Aug 28, 2018

ACTIVE
Status

50
Questions

303
Responses

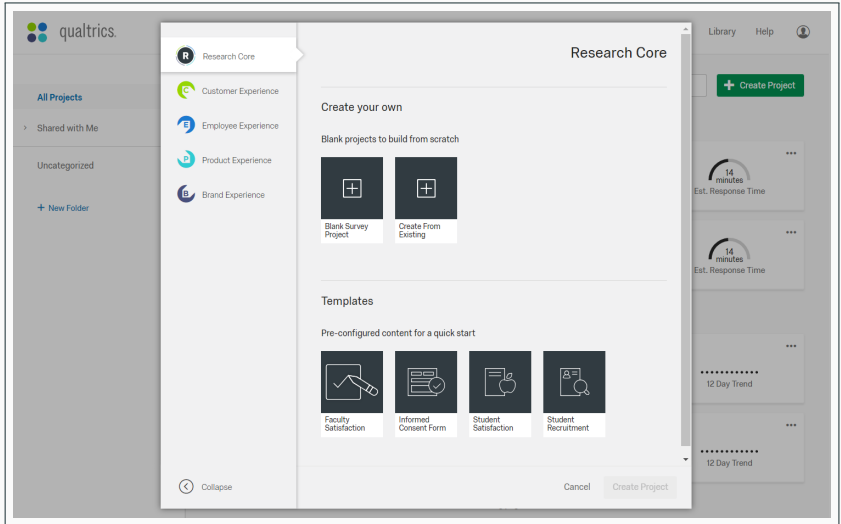
.....
12 Day Trend

...

Showing page 1 of 1

7

Creating New Survey



Creating New Survey

Example Survey

ProjectsContactsLibraryHelp

SurveyActionsDistributionsData & AnalysisReports

Look & FeelSurvey FlowSurvey OptionsTools

PreviewPublishSearch

Example Survey

iQ Score: Great

Default Question BlockBlock Options

Q1

Click to write the question text

Click to write Choice 1

Click to write Choice 2

Click to write Choice 3

Import Questions From...

Create a New Question

Add Block

End of Survey

Survey Termination Options...

Change Question Type

Multiple Choice

Choices

3 Edit Multiple

☐ Automatic Choices

Answers

☒ Single Answer

☐ Multiple Answer

More...

Position

☒ Vertical

☐ Horizontal

More...

Validation Options

☐ Force Response

Validation Type

☒ None

☐ Custom Validation

Actions

☐ Add Page Break

Guide

CREATE PROJECT

SET UP SURVEY

Set up your survey questions and design.

Add Questions

Add questions to your survey. Mark as complete when done.

Visit help page

Edit Look & Feel

Preview Survey

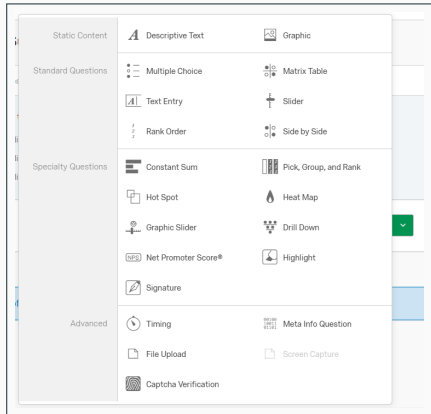
DISTRIBUTE SURVEY

COLLECT RESPONSES

VIEW RESULTS REPORT

Adding Survey Questions

- Qualtrics has a variety of question formats.
- Each format has additional options.

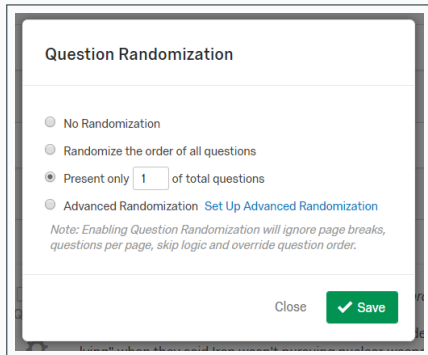
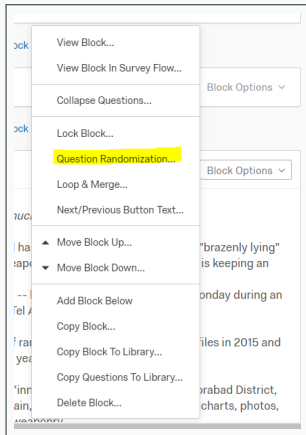


Control and personalize what respondents see using the **survey flow**.

- Reorder, duplicate, and delete blocks.
- Add branching.
- Add randomization.
- Assign values to branches and randomization arms.

To create an experiment, you can randomize at either the question level, or the block level (done in survey flow).

Example: Question-level Randomization



Example: Survey Blocks

The screenshot displays a web-based survey editor interface. At the top, a navigation bar includes a logo, the survey title "Example Survey for PS239T", and links for "Projects", "Contacts", "Library", and "Help". Below this, a secondary navigation bar features tabs for "Survey", "Actions", "Distributions", "Data & Analysis", and "Reports". The "Survey" tab is active, showing a toolbar with icons for "Look & Feel", "Survey Flow", "Survey Options", and "Tools". To the right of the toolbar are buttons for "Preview" (blue) and "Publish" (green), along with a search bar. The main content area is titled "Example Survey for PS239T" and shows an "IQ Score: Great" indicator. The survey structure is presented as a list of blocks: "Consent (1 Question)", "Screener (1 Question)", "Race (1 Question)", "Racial identity (3 Questions)", and "Racial Resentment Scale (6 Questions)". Each block has an "Add Block" link and a "Block Options" dropdown menu. The interface is clean and modern, with a light gray background and white content boxes.

Example Survey for PS239T

Look & Feel Survey Flow Survey Options Tools

Preview Publish Search

Example Survey for PS239T IQ Score: Great

- Consent (1 Question) Block Options Add Block
- Screener (1 Question) Block Options Add Block
- Race (1 Question) Block Options Add Block
- Racial identity (3 Questions) Block Options Add Block
- Racial Resentment Scale (6 Questions) Block Options

Example: Expand Survey Block

Look & Feel

Survey Flow

Survey Options

Tools ▾

Preview

Publish

Search

Example Survey for PS239T

iQ Score: Great

▶ Consent (1 Question)

Block Options ▾

Add Block

▼ Screener

Block Options ▾

screener

We check responses carefully in order to make sure that people have read the instructions for the task and responded carefully. **We will only accept participants who clearly demonstrate that they have read and understood the survey.** Again, there may be some very simple questions that test whether you are reading the instructions. If you get these wrong, you will not be eligible for participation.

☐ I understand

☐ I do not understand

Import Questions From...

+ Create a New Question ▾

Add Block

▶ Race (1 Question)

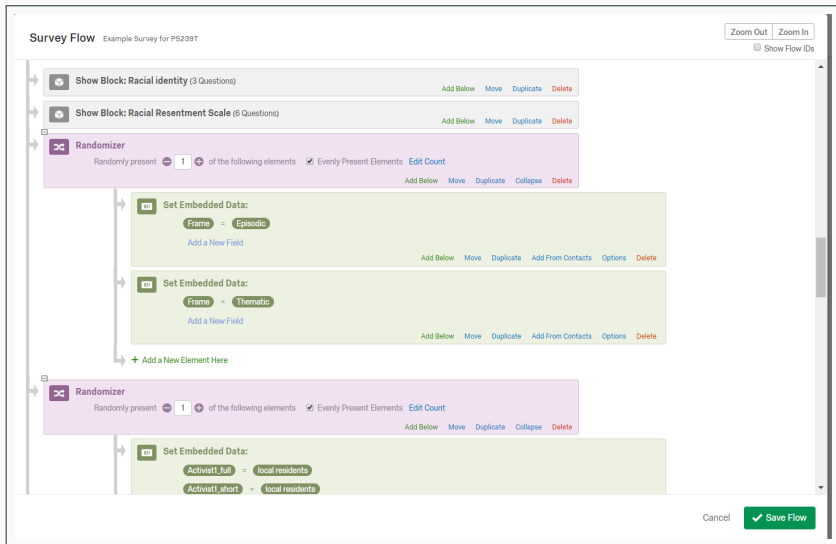
Block Options ▾

Add Block

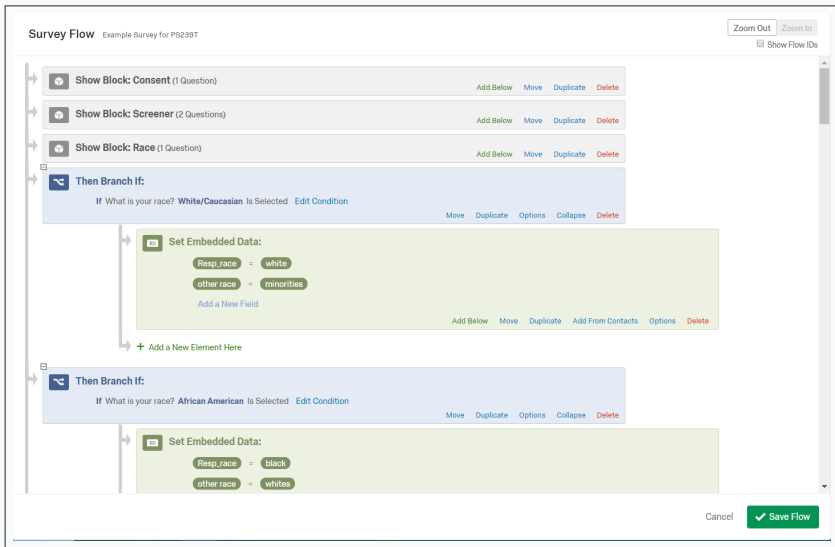
▶ Racial identity (3 Questions)

Block Options ▾

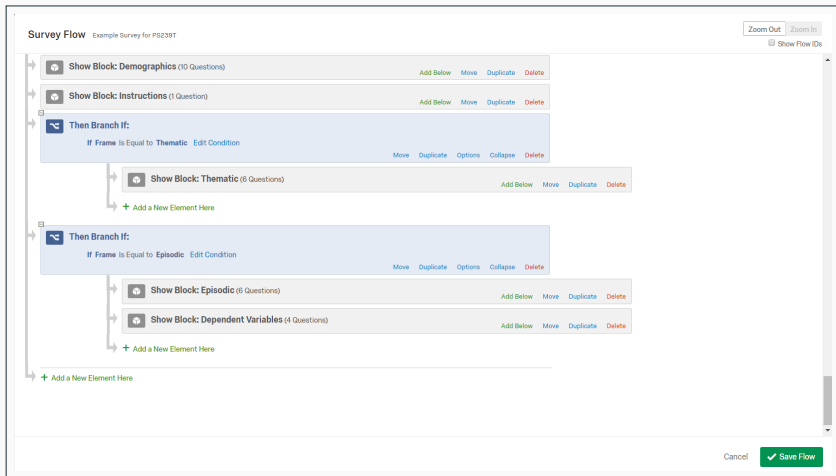
Example: Survey Flow



Example: Branching



Example: Block-level Randomization



Example: Randomizing text in questions

☐
Q35



`{e://Field/Race1}` affected by Hurricane Harvey say they still lack housing, adequate assistance

Three months after Hurricane Harvey, over 20 percent of Texas Gulf Coast `{e://Field/Race2}` said their homes endured major damage and over 30 percent said a household member has lost income or a job, according to a new survey.

Financial and housing issues are two persistent issues Harvey victims are still struggling with three months after the hurricane, the survey said. Over 30 percent of Texas Gulf Coast `{e://Field/Race2}` say they are not getting the assistance they need to recover from Harvey.

The survey was based on interviews conducted between Oct. 17 and Nov. 20 with 1,635 residents of 24 counties that are home to more than 90 percent of the population affected by the storm. The sample is representative of the region's demographics and the margin of error is plus or minus 3 percentage points.

Hurricane Harvey hit the Texas Gulf Coast in late August, bringing more than 50 inches of rain and leaving unprecedented flooding and destruction along its path. More than 80 people died and 60 counties remain in a state of disaster, according to Gov. Greg Abbott's office.

☐
Q32



Have you seen a story like this one?

- ☐ Yes
- ☐ Maybe
- ☐ No

Page Break

Example: Randomizing text in questions

The screenshot displays a software interface for randomizing text in questions. At the top, a purple bar labeled "Randomizer" contains the text "Randomly present" followed by a minus button, a box with the number "1", and a plus button, followed by "of the following elements". There is a checked checkbox for "Evenly Present Elements" and a link "Edit Count". Below this bar are four action links: "Add Below", "Move", "Duplicate", "Collapse", and "Delete".

Below the Randomizer bar, there are two identical-looking blocks, each titled "Set Embedded Data:" with a small "ED" icon. Each block contains a list of fields with their values:

- Victim = white
- Race1 = White residents
- Race2 = white residents
- First Name = DeAndre
- Second Name = Jackson
- Headline = victim DeAndre Jackson

Below the first block is a link "Add a New Field". To the right of the first block are five action links: "Add Below", "Move", "Duplicate", "Add From Contacts", "Options", and "Delete".

The second block contains the same fields but with different values:

- Victim = black
- Race1 = Black residents
- Race2 = black residents
- First Name = Jeremy Miller
- Second Name = Miller
- Headline = victim Jeremy Miller

Below the second block is a link "Add a New Field". To the right of the second block are five action links: "Add Below", "Move", "Duplicate", "Add From Contacts", "Options", and "Delete".

Parsimony is your defense against human errors, just like it is in coding.

How do you achieve parsimony and complexity?

If you simply must do complicated randomizations within a question, you probably need embedded data and/or javascript.

Using Javascript for Randomization

Survey Flow 2016 IGS Non-Oversample Instrument Zoom Out Zoom In
☐ Show Flow IDs

ED

Set Embedded Data:

City

=

`\${loc}://City`

State

=

`\${loc}://Region`

Q_URL

Value will be set from Panel or URL.

Set a Value Now

Q_TerminateFlag

Value will be set from Panel or URL.

Set a Value Now

Add a New Field

Add Below Move Duplicate Add From Contacts Options Delete

ED

Set Embedded Data:

fivezip

Value will be set from Panel or URL.

Set a Value Now

income

Value will be set from Panel or URL.

Set a Value Now

marital

Value will be set from Panel or URL.

Set a Value Now

employ

Value will be set from Panel or URL.

Set a Value Now

edu

Value will be set from Panel or URL.

Set a Value Now

occu

Value will be set from Panel or URL.

Set a Value Now

race

Value will be set from Panel or URL.

Set a Value Now

Cancel ✓ Save Flow

21

22

 Save

MTurk

Optional Challenge - Set up your Amazon Turk account!

Create account: <https://www.mturk.com/get-started>.

More information about using MTurk for survey research can be found here:

<https://medium.com/@mechanicalturk/getting-started-with-surveys-and-market-research-3ca5c3b34f5b>.

How to use for surveys

Generally, use MTurk to find and contact respondents. For the survey itself, direct respondents to click on Qualtrics link.

Possible to contact workers through R using the MTurkR package.

Creating new MTurk project

amazonmturk
Requester

CreateManageDeveloper

Julia Christensen | My Account | Sign Out | Help

New Project

Select a customizable template to start a new project

Survey

Survey Link

Survey

Vision

Image Classification

Bounding Box

Semantic Segmentation

Image Contains

Video Classification

Moderation of an Image

Image Tagging

Image Summarization

Language

Sentiment Analysis

Collect Utterance

Emotion Detection

Semantic Similarity

Conversation Relevance

Audio Transcription

Document Classification

Translation Quality

Survey Link Instructions (Click to collapse)

We are conducting an academic survey about social networks. We need to understand your opinion about social networks. Select the link below to complete the survey. At the end of the survey, you will receive a code to paste into the box below to receive credit for taking our survey.

Make sure to leave this window open as you complete the survey. When you are finished, you will return to this page to paste the code into the box.

Template note for Requesters - To verify that Workers actually complete your survey, require each Worker to enter a **unique** survey completion code to your HIT. Consult with your survey service provider on how to generate this code at the end of your survey.

Survey link:

Provide the survey code here:

You must ACCEPT the HIT before you can submit the results.

In-class Exercises

Challenge #2

Create short survey using the following:

- 3+ question formats
- 2+ blocks
- 1+ question-level randomization
- 1+ block-level randomization

Questions?

Extra Slides - Experiments

What's the difference between a survey and an experiment?

A survey is any **observational** data you might collect about an entity or entities

- When we talk about surveying people, we mostly think of asking them questions

An **experiment**, broadly speaking, involves two or more conditions (or “treatment and control”) that you want to compare

BUT... To have a high-quality experiment, you need random assignment, and you need a control. In other words, you need a **randomized control trial** (“RCT”).

Why do a randomized control trial (RCT)?

Randomization allows us to measure an outcome among similar groups of people.

- With large enough samples, any differences between groups should be due to your treatment intervention.

Control conditions allow us to meaningfully estimate the effect of our treatment.

- Without a control group, we cannot estimate what the outcome would have been without the treatment.
- Many experiments use inadequate controls (e.g., mistaking a placebo for a control, or vice versa).