

A streamlined approach to online linguistic surveys^{*}

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Abstract

More and more researchers in linguistics use large-scale experiments to test hypotheses about the data they research, in addition to more traditional informant work. In this paper we describe a new set of free, open-source tools that allow linguists to post studies online, *turktools*. These tools allow for the creation of a wide range of linguistic tasks, including grammaticality surveys, sentence completion tasks, and picture-matching tasks, allowing for easily implemented large-scale linguistic studies. Our tools further help streamline the design of such experiments and assist in the extraction and analysis of the resulting data. Surveys created using the tools described in this paper can be posted on Amazon’s Mechanical Turk service, a popular crowdsourcing platform that mediates between ‘Requesters’ who can post surveys online and ‘Workers’ who complete them. This allows many linguistic surveys to be completed within hours or days and at relatively low costs. Alternatively, researchers can host these randomized experiments on their own servers using a supplied server-side component.

1. Introduction

In recent years, researchers in linguistics have begun to supplement traditional informant work with experimental methods. With crowdsourcing platforms such as Amazon’s Mechanical Turk (henceforth: AMT), researchers can develop and test hypotheses with many naïve speakers within days at very low cost. The purpose of this paper is to describe the process of creating an experiment, running it online, and obtaining results using originally-developed tools that allow researchers who have little programming experience to create linguistic surveys. These tools, as well as several example templates corresponding to different kinds of tasks, were written under a liberal, open-source license and are distributed for free online at <http://turktools.net>.

The tools described here are designed for use with AMT, a popular online crowdsourcing website where companies or individuals (called *requesters*) can post small tasks (called Human Intelligence Tasks, or *HITs*) that cannot easily be automated, and therefore require human workers (called *workers*) for completion. Most HITs on AMT are small in nature (such as identifying the contents of an image) and generally numerous (it is not unusual for requesters to post thousands of tasks in a single batch). Requesters generally pay very little per HIT and retain the ability to Accept or Reject the results of each HIT before AMT sends payment to the worker. HITs can be posted using an online interface (<http://mturk.com>), and their results are easily

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analyzable using mainstream statistical software (for more information, see Fort et al. 2011; Gibson et al. 2011; Sprouse 2011).

In the next section, we will discuss the value of experimental methods and, in particular, crowdsourcing for theoretical linguistics. In section 3, we discuss some suggestions for formulating linguistic questions that can be tested using experimental methods. In section 4, we present *turktools*: a set of tools that simplify the construction of online surveys for obtaining linguistic data, and a suggested workflow for their use. Details about the use of each of the tools and further suggestions can be found in the online supplement to this paper and in the documentation on the *turktools* website, at <http://turktools.net/use/>. Finally, in section 5 we provide a brief comparison with other existing experimental tools, in particular the *turkolizer* (Gibson et al. 2011) and Ibex (Drummond 2007).

While *turktools* were built with the AMT platform in mind, they by no means require the use of AMT. We have also developed the *turkserver* program that allows for AMT-style surveys to be hosted on the researchers' own server, with independent recruitment of participants. This may be particularly useful for surveys conducted in languages that may not be well represented by AMT workers. For brevity, throughout the paper we describe the process of creating an experiment as if the researchers will upload the survey to AMT, but the majority of the process also applies to surveys hosted using *turkserver*.

2. The value of crowdsourcing in theoretical linguistics

Current research in theoretical linguistics relies heavily on *direct informant* work—obtaining linguistic data from one or several native-speaker consultants for a given language. This is often done by presenting a consultant with a sentence in a context or paired with a certain desired meaning and asking whether the sentence is appropriate in the given context (Chomsky, 1965; Schütze, 1996). This method has been criticized for often involving (a) relatively few participants, (b) a relatively small number of target stimuli, and (c) cognitive biases on the part of the researchers and participants (Schütze 1996; Cowart 1997; Edelman and Christiansen 2003; Featherston 2005; Ferreira 2005; Marantz 2005; Wasow and Arnold 2005; Myers 2009a,b; Sprouse 2009; Gibson and Fedorenko 2010).

Linguists have consistently offered strong arguments in response to these criticisms (e.g., Phillips and Lasnik, 2003; Marantz, 2005; Culicover and Jackendoff, 2010) and have reported formal experimental results, including those conducted on AMT, that corroborate many informal experimental results (Featherston, 2005; Phillips, 2009). Many judgments obtained through informal methods and presented in journals and textbooks have been experimentally replicated using diverse experimental methods and tasks, thus showing that many of the criticisms cited above are unwarranted (Munro et al. 2010; Cable and Harris 2011; Sprouse 2011; Sprouse and Almeida 2012, 2013; Sprouse, Schütze, and Almeida 2013).

Following this latter work, we believe that experimental methods are not necessary in order to substantiate every linguistic claim made in the literature. Nonetheless, such methods are often useful and helpful in the process of theory-building. With crowdsourcing tools as AMT, researchers can develop and test hypotheses with many naïve speakers within days at relatively low cost. Therefore, although we do not advocate the use of these methods in all cases and at all costs, we believe that it is vital for theoretical linguists to develop the skills that would allow them to use such methods when necessary.

As the use of crowdsourcing websites has gained popularity in recent years, many studies have set out to compare experimental results of AMT workers and lab-based participants. These studies have found that crowdsourcing websites often allow for the recruitment of more diverse and representative participants than in many lab settings,¹ and provide results that are as reliable as lab-based experiments.² In addition to the replication of linguistic results, as noted above, other experimental results in the social sciences have also been replicated, for example the Stroop, Switching, Flanker, Simon, Posner Cuing, attentional blink, subliminal priming, and category learning tasks, classical experimental tasks drawn from the heuristics and biases literature, psychometric data, and even clinical findings (Gosling, Vazire, Srivastava, and John 2004; Ipeirotis, 2010; Ipeirotis, Provost, and Wang 2010; Paolacci, Chandler, and Ipeirotis 2010; Buhrmester, Kwang, and Gosling, 2011; Horton, Rand, and Zeckhauser 2011; Mason and Siddharth 2011; Berinsky, Huber, Lenz 2012; Germine, Nakayama, Duchaine, Chabris, Chatterjee, and Wilmer 2012; Crump, McDonnell, and Gureckis 2013; Shapiro, Chandler, and Mueller 2013; and references therein). We note that these studies have also found limitations on the use of crowdsourcing for experimental studies, in particular when an experiment is excessively long or when insufficient compensation is offered. See Reips (2002) for a useful general overview of advantages and potential pitfalls of the use of internet-based experiments.

The most recent demographic study of AMT workers in the literature was conducted in 2010 (Ipeirotis 2010; also Mason and Siddharth 2011). Ipeirotis (2010) surveyed 1,000 Turk workers, and received responses from participants from 66 different countries. Of those participants, however, 46.80% were from the US, 34% were from India, and 19.20% were from other countries. The authors of this paper know that *turktools* have been successfully used to recruit participants on AMT for experiments in English, German, and Indian languages such as Telugu and Hindi. To our knowledge, however, there is no existing survey of the languages spoken by AMT workers. We refer the reader to the worker map in Tamir (2011), which details the country of residence of 50,000 AMT workers.³

¹ Participants in university lab settings often tend to be college students, and hence have a restricted distribution of age, education, and socio-economic status.

² An anonymous reviewer asks whether there has been a comparison of AMT and lab data for tasks involving timing, for example for Self-Paced Reading. To the best of our knowledge, although there is ongoing work attempting to answer this question (see Tily and Gibson, ms), there are no published results.

³ A screen capture of this map can be found at <http://turktools.net/crowdsourcing/>.

We note that some concerns have been raised about the nature of the AMT participant pool in the context of linguistic experiments, in particular as to the proportion of workers who complete most of the HITs posted on AMT (Fort et al. 2011). From our own experience with AMT, however, we believe that such concerns are unfounded. In all the AMT experiments conducted at the LAB between November 2010 and April 2013, a total of 4635 unique workers participated in at least one study; 643 (14%) participated in more than one study, 152 (3%) participated in more than two studies, and only 15 (0.3%) participated in more than five.⁴ Thus, we believe that the diversity of our data is not jeopardized by the tendencies described in Fort et al. (2011).⁵

3. Formulating a research question and choosing an experimental design

In order to construct an online experiment, we must first formulate a clear hypothesis that can be tested using experimental methods. The simplest approach, which we will be demonstrating in this paper, is crossing two *factors* that have two *levels* each. Factorial designs have proven useful in linguistics research, and are commonly used in many areas of experimental cognitive science. 2×2 designs, in particular, are common because of their simplicity and the relative ease of the analysis of their results. We leave it to the readers to scale this design up or down to suit their own needs.

Here we will illustrate the use of factorial designs with a well-known example from the literature: *there*-constructions have been argued to show a *definiteness effect*, whereby a definite or quantified DP cannot appear in a *there*-construction (Milsark 1974, 1977 and much subsequent work):

- (1) a. There is a boy in the room
- b. *There is the boy in the room
- c. *There is every boy in the room

In what follows we restrict our attention to the contrast between (1a) and (1b). We may formulate the hypothesis that *definite DPs are ungrammatical in a there-construction*. To test this, we will compare sentences that differ in whether they contain a definite or an indefinite DP—the first *factor*. We will cross this factor with whether or not a sentence contains a *there*-construction. A sample item set for a simple survey testing the grammaticality judgments reported in the literature for the *there*-construction is given in (2), with predicted grammaticality judgments indicated. This design provides a *baseline* for the factors of interest, in (2a), which will be useful for analysis purposes.

⁴ Data collected on April 24, 2013. The vast majority of experiments were on English and restricted IP addresses of workers to within the US. Our experiments request that workers participate in each experiment only once.

⁵ The only quantitative data cited by Fort et al. (2011) to motivate this concern comes from Little (2009) who reports that, over a 75 day period in their lab at MIT's Computer Science and Artificial Intelligence Lab, 22% of their workers completed 80% of their the tasks that they posted on AMT. However, these tasks are not linguistic experiments that request that workers participate only once per experiment, unlike for the results we report above from LAB.

- | | | |
|--------|--------------------------------|--------------|
| (2) a. | A boy is in the room. | –def, –there |
| b. | The boy is in the room. | +def, –there |
| c. | There is a boy in the room. | –def, +there |
| d. | *There is the boy in the room. | +def, +there |

In many cases, testing multiple similar items, differing only in the *lexicalizations* and otherwise systematically manipulating the factors of interest, may further the validity of the experimental results. *Turktools* automates the process of randomizing items for presentation, which we discuss below. We refer the reader to the literature on internal validity and external validity for suggestions on how to correctly define one’s research goals, how many items to construct, and how to construct the items (see e.g. Gelman and Hill 2007, Myers 2009a and references therein).

The tools that we provide support a variety of different types of experiments, some of which we describe below. For each type of experiment we describe here, we provide a *skeleton* HTML file for creating such an experiment. We will discuss skeletons in more detail in Section 4.2. For other types of experiments used in the psycholinguistic literature as well as recommendations for design and data analysis, see Schütze and Sprouse (2014) and citations therein.

3.1 Acceptability judgment task

Perhaps the most commonly used experimental task in syntax and semantics research is the *acceptability judgment task* where participants are asked to judge the *acceptability* or *naturalness* of a sentence or of a sentence-meaning pair. The dependent measure in this task is a rating on some scale, where the ends of the scale may correspond to ‘acceptable’-‘unacceptable,’ ‘natural’-‘unnatural,’ ‘grammatical’-‘ungrammatical,’ ‘good’-‘bad,’ etc. Alternatively, a fixed Likert scale, often with five or seven points, or a continuous scale (Chemla and Spector 2011) may be used. A similar *magnitude estimation* task requires participants to compare the acceptability of target sentences to some predetermined reference sentence (Bard et al. 1996).⁶ The acceptability judgment task is perhaps the easiest task to implement for online surveys.

3.2 Forced-choice completion task

Another simple task is one in which a sentence or context is presented and the participant must choose which word or phrase better completes a sentence, or which whole sentence is better suited to describe a given situation. An example word completion task is given in Figure 1. The dependent measure is the rate of selection of each choice in comparison with its competitor.⁷

⁶ See Cowart 1997, Keller 2000, Featherston 2005, Sprouse 2011, Weskott and Fanselow 2011, among others, for more on magnitude estimation, including its advantages and potential criticisms.

⁷ Our supplied skeletons support choices introduced with buttons below the sentence, as in Figure 1, or with a drop-down menu.

There is _____ boy in the room. <input type="radio"/> the <input type="radio"/> a
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Figure 1. A sample word completion task

3.3 Picture-matching tasks

For tasks in which a visual scene must be presented, a *picture-matching* task is often used. In this task, participants are shown a picture and are asked to choose which among several options best describe the scene, or alternatively they are presented with a sentence and several pictures and must choose which picture best matches the description in the sentence. The dependent measure is the rate of choice of a given sentence or picture compared to its competitors. In another variant of the task, participants are presented with a picture and a sentence that describes it, and must decide whether or not the sentence is a good description of the picture. The picture-matching skeleton we provide also allows for an easy implementation of the ‘Covered Box’ technique, which is particularly suited for detecting less preferred interpretations of ambiguous sentences (for details, see Huang, Spelke and Snedeker, 2013; Pearson, Khan and Snedeker 2010).

3.4 Additional modifications

For the experiment types described above (and others that users of our tools might develop), several modifications can be easily made:⁸

- An audio file may be added.
- A context may be added before or after the target sentence.
- A comprehension question may be added either before or after the target sentence.
- For *cognitive load* paradigms, the target task may be interrupted by a secondary task.
- Items may be presented one at a time instead of all together on the same page.
- The sequence in which items are shown can be controlled—for example, it is possible to first show a picture, then mask the picture and ask a question about the picture. This setup is also useful for *cognitive load* paradigms.
- Timing information may be logged for each item or parts of an item that have been viewed.

⁸ Some of these modifications require custom JavaScript programming in the template. Our own templates utilize the jQuery JavaScript library (<http://jquery.com/>), and we recommend its use for such custom programming.

4. A suggested workflow for an AMT experiment using *turktools*

In this section we present a proposed workflow for the process of creating an experiment and uploading it to AMT, once an appropriate research question has been formulated. We introduce the different tools in *turktools* as they become relevant in the process. Details about the different tools and their use can be found in the appendices in the online supplement to this paper and in the documentation on the *turktools* website.⁹

(3) Suggested workflow:

- a. Formulate a research question and choose an appropriate experimental design. (Section 3)
- b. Choose an appropriate *skeleton* to fit your design, and edit it for your needs.
- c. Create an AMT-compatible *template* from the skeleton, using the *Templater*.
- d. Create your items. Create an AMT-compatible randomized lists file, using the *Lister*.
- e. Inspect your survey and make sure it is ready to be posted, using the *Simulator*.
- f. Post your survey on AMT. Once you are done, decode your results file, using the *Decoder*.
- g. Analyze your data using any statistical software of your choice.

For brevity, we describe the process of creating an experiment as if the researchers will upload the survey to AMT, but the majority of the process also applies to surveys hosted on the researchers' own server using *turkserver*. We discuss *turkserver* at the end of this section.

4.1. Getting started: the structure of an AMT survey

An AMT survey consists of two parts that must be created by the researchers: (a) an HTML template, and (b) an items file. The template provides the overall structure of an experiment, and contains *fields* that specific strings will be plugged into. The items file contains the actual strings to be used, including the linguistic stimuli that will be judged by participants. AMT takes the template and items file, combines them, and presents them to workers for completion.

Researchers who are using *turktools* for the first time are encouraged to begin the process by downloading *turktools* from <http://turktools.net/>.¹⁰ For ease of use, we recommend saving a copy of *turktools* in the same folder as all of the files associated with a particular study. If the study will be posted on AMT, we also encourage the researchers to create an account on AMT as a 'Requester' before continuing with the rest of the process.

4.2. Creating an AMT-compatible template: using the skeletons and *Templater*

Once a research question is formulated and an experiment type has been selected to test it, the presentation of the survey can be determined. Surveys are presented on AMT using an HTML

⁹ *Turktools* is an ongoing, open-source project. The documentation will be continuously updated as necessary, and we encourage contributions by other users. Details can be found at: <http://turktools.net/use/>.

¹⁰ At the time of writing, these tools require the use of Python 2.6.x or 2.7.x, available at <http://python.org>. However, the tools described here and their prerequisites and usage are subject to change. Please consult the latest information at <http://turktools.net> before using these tools.

template. Creating a template for use on AMT requires two steps: (a) choosing an appropriate *skeleton* out of the ones offered on as part of turktools and editing it to fit your study, and then (b) creating a template from the skeleton using the *Templater*.

Skeletons are recipes for different experiment types that abstract away from the number of items that will be presented in a given study. For each experiment type we surveyed in Section 3, we provide a corresponding skeleton. At the moment, 10 different skeletons are provided. These skeletons all share the same basic structure, illustrated in Figure 2 using the `binary.skeleton.html` skeleton. For details on the skeletons and this figure, see Appendix A.

{{! This is a template skeleton; use templater.py! }}

Survey Code: {{code}}

PLEASE COMPLETE AT MOST ONE {{code}} SURVEY. YOU WILL NOT BE PAID FOR COMPLETING MORE THAN ONE SURVEY WITH THIS CODE.

Instructions: ...

Consent Statement: ...

If your browser has JavaScript turned on, a counter will be displayed at the bottom of the page indicating how many questions have been answered. **It is highly recommended that you turn on JavaScript and use this tool before submitting to ensure that all questions have been answered and you can receive payment.**

{{#items}}
 {{number}}. {{field_1}}
 ☐ NATURAL ☐ UNNATURAL

{{/items}}

Demographic questions, questions about native language.

After submitting this HIT, do NOT submit another HIT with survey code {{code}}. You will not be paid for completing more than one survey with this code.

0 questions (out of {{total_number}} total) have been answered. If you submit now, you will not be paid.

Figure 2. An example skeleton file

After choosing a skeleton and editing it, a template must be created out of the skeleton using the *Templater* Python script. Your template is now ready to be uploaded onto AMT. Details about the *Templater* can be found in Appendix A of this paper.

4.3. Creating an AMT-compatible items file: using the *Lister* and *Simulator*

Once a template has been created, the next step is to construct the items, formatted to match the chosen skeleton. In our simple 2×2 experiment crossing two *factors* (here: *definiteness*, *there-construction*) with two *levels* each (here: *+/- definite*, *+/- there-construction*), a sample target *item set* for a sentence judgment task will look as in (4):

(4) **A sample item set:**

<i>Stimulus:</i>	<i>Condition name:</i>	<i>Factor values:</i>
a. A boy is in the room.	indef-no.there	–definite, –there-condition
b. The boy is in the room.	def-no.there	+definite, –there-condition
c. There is a boy in the room.	indef-there	–definite, +there-condition
d. There is the boy in the room.	def-there	+definite, +there-condition

The raw items file can be created in any text editing software and saved as a plain text (.txt) file. Items must be formatted as in Figure 3 below. Details about the structure and format of the items file are given in Appendix B.

```
# target 1 indef-no.there
A boy is in the room.

# target 1 def-no.there
The boy is in the room.

# target 1 indef-there
There is a boy in the room.

# target 1 def-there
There in the boy in the room.
```

Figure 3. Sample item set with four conditions, in *Lister* format

Once the target and filler items for the survey have been constructed, the next step is to create multiple randomized lists of these items, which will help control for any possible effects of presentation order of your items. This step is done using the *Lister* tool. The *Lister* takes the raw items file and generates a file with multiple randomized lists of these items in CSV format. The randomized lists file contains a row for each randomized list, including the actual text that the workers will see, with a header row at the top. AMT will substitute these strings into the HTML template for participants to see. Details about the *Lister* can be found in Appendix C.

Once the HTML template and randomized items file are created, you are ready to post your study on AMT. Before doing so, however, we recommend simulating your experiment using the *Simulator* tool. The simulator will take the template and items file and combine them to produce

a simulation of an actual survey, as your participants will see it. We recommend that researchers complete their own study at least once. This can be beneficial for many reasons, including the detection of any problems or mistakes in the experiment. Details about the *Simulator* can be found in Appendix D.

Once the simulation is done, you are ready to post your study on AMT. To do so, see the instructions in Appendix E and at <http://turktools.net/use/turk.html>.

4.3. Retrieving and analyzing the results of an AMT survey: using the Decoder and analysis.r

After your experiment has completed you can download the raw results file from AMT. We recommend saving this file in the same folder as the other documents produced in the course of preparing your survey. The *Decoder* script will create a decoded version of the file, which facilitates its analysis using statistical software. We have provided some basic R code in the analysis script `analysis.r`, which researchers can adapt for their own needs. Details about the *Decoder* and the analysis script can be found in Appendix F.

4.4. Using turktools with languages other than English

Turktools can also be used to construct experiments in other languages besides English. To do this, the researchers must (a) translate the skeleton that they wish to use into the target language, and (b) create items in that language. All other steps in the process remain as described above.

4.5. Hosting experiments without using AMT

Turktools were written specifically for use with AMT. However, in some cases researchers may choose not to use AMT for their study. This may be desirable, for example, in cases where the researchers would like to target a specific participant pool, or in cases when the target language of the survey is not well represented by AMT workers.

In such cases, researchers may choose to use the *turkserver* program we provide to host the experiment on their own server. If *turkserver* is used, participant recruitment and payment is left up to the researchers, who may choose any existing means for recruiting participants, e.g. mailing lists, popular websites in the target language, or recruiting of students through colleagues who work at universities in countries where the language is spoken. *Turkserver* is freely available at <http://turktools.net/use/server.html> under a liberal open-source license. Details about *turkserver* can be found in Appendix G.

5. Comparison with other experimental tools

A number of other software tools exist to aid in the construction of online linguistic surveys, but differ from *turktools* in their design, flexibility, and technical know-how required. The *turktools* we provide and describe here are inspired by the *turkolizer* tool described in Gibson et al (2011). In comparison to the *turkolizer*, *turktools* has been designed to be a general-purpose tool, with a very flexible template and item set structure, supporting a wider variety of different experimental tasks. (See Appendices A and B on the structure of *turktools*' skeleton and item files, and in particular the Appendix's footnote 22 which explicitly describes differences between the *turkolizer*'s items format and *turktools*'.) *Turktools* also provides tools to automate more of the experiment construction and analysis process.¹¹

Turktools and the *turkolizer* are unique among tools for linguistic experiment generation in being explicitly designed with the AMT crowdsourcing platform in mind, allowing linguists to take advantage of the large, pre-existing participant pool on AMT. By providing the supplementary *turkserver* tool (Section 4.5), we go one step further in increasing the utility of our tools, so that the *turktools* we provide can also be used beyond the AMT participant pool.

Other tools offer the ability to implement a variety of complex experimental paradigms, at the cost of increasing technical complexity.¹² Examples include WebExp (Corley and Scheepers 2002; Keller et al. 1998; Keller et al. 2009) and Ibex (Drummond 2007), the latter having originally been designed for self-paced reading experiments (Just, Carpenter, and Woolley 1982). Both present a higher technical barrier to entry than our *turktools*, both in terms of experiment creation and in the deployment of their experiments; both are written as server-side software packages that are designed to run on the researchers' own servers, configured in a particular way. Finally, since these tools are not designed to integrate with any crowdsourcing platform, they require the independent recruitment of participants.¹³

We note that there are no technical barriers to implementing within *turktools* the types of timing-sensitive experiments made possible by WebExp and Ibex. We hope that future updates to *turktools* might introduce skeletons for tasks such as self-paced reading, facilitating their use directly on the AMT platform.

¹¹ In the interest of space, we do not critically review the Gibson et al (2011) paper and *turkolizer* tool here.

¹² A notable exception is MiniJudge (Myers 2009a,b), which was designed with the different goal of facilitating the process of constructing linguistic stimuli for experimental use.

¹³ We at LAB have recruited participants for Ibex experiments on AMT, although the process is slightly cumbersome for both researchers and participants alike. Because the Ibex software cannot currently be run on AMT directly, participants on AMT were asked to go to a different website, which hosts the Ibex software, and then return to the AMT website to complete their experiment. An additional step of cross-referencing submissions between the AMT and Ibex submission results is then necessary in order to verify experiment participation in order to pay participants on AMT.

6. Conclusion

In this paper we presented a set of tools we have developed that allow linguists to quickly and efficiently test diverse hypotheses stemming from their work using large-scale linguistic surveys. These tools further help streamline the design of such surveys and assist in the extraction and analysis of the resulting data. The tools were written with Amazon's Mechanical Turk crowdsourcing platform in mind, and a supplied server-side component allows researchers to host these randomized surveys on their own servers without the need to use AMT, when appropriate. The ease and speed with which linguistic hypotheses can be tested on AMT makes this platform a useful tool for theoretical linguists, and we hope that more linguists will learn to take advantage of this resource. We hope that the tools we have developed will make experimental methods more accessible to researchers with less background in the use of such techniques and will thus make experimental methods more accessible to a wider range of working linguists.

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APPENDICES:

Below we present detailed information about the use of the different components of *turktools*, which were introduced in section 3 of the paper. These tools are presented in the order that they are used in the recommended workflow, described in the paper. Further ongoing documentation for the *turktools* project can be found online at: <http://turktools.net/use/>.

A Skeletons and Templater: Creating an HTML template for use on Mechanical Turk

Once a research question is formulated and an experiment type has been selected to test it, the presentation of the survey can be determined. Surveys are presented on AMT using an HTML template. We recommend creating a template in two steps: (a) choosing an appropriate *skeleton* out of the ones offered on as part of *turktools* and editing it to fit your study, and then (b) creating a template from the skeleton using the *Templater*.

Skeletons are recipes for different experiment types that abstract away from the number of items that will be presented in a given study. They are stripped-down versions of HTML templates which should be edited to fit each particular design or experiment. We recommend the use of a programming text editor to edit these files.¹⁴ For each experiment type we surveyed in Section 3 of the paper, we provide a corresponding skeleton:

(5) Supplied skeleton files:

- | | | |
|----|---|--|
| a. | <code>binary.skeleton.html</code> | grammaticality judgment, yes-no task |
| b. | <code>slider.skeleton.html</code> | grammaticality judgment, gradient judgment task |
| c. | <code>likert.skeleton.html</code> | grammaticality judgment, Likert scale task |
| d. | <code>magnitude-estimation.skeleton.html</code> | grammaticality judgment, magnitude estimation task |
| e. | <code>constant-sum.skeleton.html</code> | grammaticality judgment, constant-sum scale task |
| f. | <code>image-choice.skeleton.html</code> | picture selection task |
| g. | <code>binary-image.skeleton.html</code> | picture judgment, yes-no task |
| h. | <code>completion.skeleton.html</code> | word-completion task |
| i. | <code>sentence-choice.skeleton.html</code> | sentence-completion task |
| j. | <code>completion-menu.skeleton.html</code> | completion task with drop-down menu |

A skeleton is itself an HTML file, but contains *substitution tags* which will be filled in by the *Templater*. These tags are all wrapped in double curly braces, i.e. `{{...}}`. The skeletons we provide all share the same basic structure, illustrated in Figure 4, using the `completion.skeleton.html` skeleton. The very top of the skeleton has a comment to remind users that a template must be created out of the skeleton before uploading to AMT.¹⁵

¹⁴ Good, free options include *Notepad++* for Windows and *TextWrangler* for Mac.

¹⁵ Comments, which will be completely ignored and removed by the *Templater*, are tags with an exclamation point, as in `{{!...}}`.

Each experiment will be assigned a code, which is used to instruct workers to only complete one survey of a certain type.¹⁶ Next are the instructions for the survey, including any practice items, as well as a consent statement and contact information for the experimenters.¹⁷ Finally, there is text that requests workers to turn on JavaScript in their browser. This enables a counter that is included in all the skeletons which helps workers make sure that they have answered all the questions in the survey.¹⁸

¹⁶ This is often desired in linguistic experiments. Collecting multiple judgments from the same language consultant may result in skewed results of a study, if the researchers mistakenly treat these observations as independent.

¹⁷ Approval for your proposed experiments from the Institutional Review Board (IRB) at your institution may be required before you run them on AMT. Please consult your institution's IRB.

¹⁸ Researchers can make the use of JavaScript obligatory, for example if JavaScript is used for critical manipulations such as hiding and revealing stimuli or recording timing information. For most of the template skeletons that we provide, it is possible for participants to take part in surveys even if JavaScript is not enabled in their browser. The result is that they will not see the counter, but other functionality of the survey will be maintained.

```

{{! This is a template skeleton; use templater.py! }}
Survey Code: {{code}}

PLEASE COMPLETE AT MOST ONE {{code}} SURVEY. YOU WILL NOT BE PAID FOR COMPLETING MORE THAN ONE SURVEY WITH THIS CODE.

Instructions
This questionnaire presents {{total_number}} English sentences. Each sentence contains a gap and there are two options below the sentence for what should go in that gap. Choose the option that sounds more natural to you. Here is an example:

        There is ____ boy in the room.
        ☐ the   ☐ a

In this example...

Consent Statement: ...

If your browser has JavaScript turned on, a counter will be displayed at the bottom of the page indicating how many questions have been answered. It is highly recommended that you turn on JavaScript and use this tool before submitting to ensure that all questions have been answered and you can receive payment.



---


{{#items}}
{{number}}.  {{field_1}} ____ {{field_2}}
☐ {{field_3}}   ☐ {{field_4}}



---


{{/items}}

Demographic questions, questions about native language.



0 questions (out of {{total_number}} total) have been answered. If you submit now, you will not be paid.

After submitting this HIT, do NOT submit another HIT with survey code {{code}}. You will not be paid for completing more than one survey with this code.

```

Figure 4. An example skeleton file for a completions study, `completion.skeleton.html`

Notice the substitution tags in this skeleton. The *Templater* will replace `{{code}}` with the experiment's unique code, and `{{total_number}}` with the number of items presented in the experiment.¹⁹

¹⁹ An anonymous reviewer suggests using color-coding instead of, or in addition to, experiment codes. This will make it easier to participants to remember whether or not they have already participated in the study. Although this

The main body of the skeleton is the items block, beginning with `{{#items}}` and ending with `{{/items}}`. The items block contains one sample item of the shape that all items in the survey will take. When a template is created out of the skeleton, this block will be duplicated as many times as there are items in your survey. The item contains the tag `{{number}}`, which will be replaced with the item number in the experiment, as well as a number of `{{field_n}}` tags. In this case, each item is made up of four fields: fields 1 and 2 are the parts of the sentence before and after the gap and fields 3 and 4 correspond to possible answer options. Each of these `{{field_n}}` tags will be replaced by a different “field” in the items file. The makeup of the items file will be described in the following section.

Below the items block are some demographic questions. We always ask participants to indicate their native language and any other languages they speak, although we clarify that payment is not contingent on their answers to these questions. Researchers may wish to add questions about gender, age, origin, etc. Finally, at the bottom of the skeleton is a counter to help workers ensure that they reply to all questions before submitting their survey. Below the counter is text warning participants not to accept a second HIT with the same code after submitting their survey.

Note that all parts of the skeleton can be edited, moved around or removed to suit the needs of the researchers and the study. We recommend saving the changes to the skeleton in a dedicated folder that will contain all files pertaining to the same experiment. At least some changes will only have to be made once—for example, the consent statement should be the same in all surveys conducted under the same IRB approval.

After choosing a skeleton and editing it, a template must be created out of the skeleton using the *Templater*. The script *templater.py* should be saved in the same folder as the skeleton. The *templater.py* script and all other Python scripts described in this paper can be run in the following manner:

(6) Executing a Python script (here *templater.py*):

- a. UNIX shell: move (cd) to the directory that contains the script and execute python `templater.py`.
- b. Mac OS X: Right-click on the file in the Finder and choose Open With... > Python Launcher.
- c. Windows: Double-click on the file.²⁰

The *Templater* will ask for three pieces of information:

is not at the moment a default part of *turktools*, see the online documentation for how to implement such a feature in your skeleton: <http://turktools.net/use/color.html>.

²⁰ For Mac OS X and Windows, these instructions assume that Python was installed using the standard Python binary packages provided at <http://python.org>. If not, use the UNIX shell instructions via the Terminal on Mac, and open using the `python` application on Windows. Please consult the latest information at <http://turktools.net> regarding supported Python versions and dependencies.

- (7) a. the skeleton file name: one of the skeletons provided here or others you create yourself.
- b. the number of items in your survey: including all experimental and filler items but not practice items, which are coded in the skeleton.
- c. a survey code: any letter-number combination you choose.

Once these are provided, a template file will be created. The template file will be located in the same folder as the skeleton file and the *templater.py* script.

B Creating an items file

Once a design and a template have been decided on for your survey, items need to be created. For a simple 2×2 experiment crossing two *factors* (here: *definiteness*, *there-construction*) with two *levels* each (here: *+/- definite*, *+/- there-construction*), each target item set will contain four different *conditions*. A sample target *item set* for a sentence judgment task will look as in (8).

(8) A sample item set:

<i>Stimulus:</i>	<i>Condition name:</i>	<i>Factor values:</i>
a. A boy is in the room.	indef-no.there	–definite, –there-condition
b. The boy is in the room.	def-no.there	+definite, –there-condition
c. There is a boy in the room.	indef-there	–definite, +there-condition
d. There is the boy in the room.	def-there	+definite, +there-condition

Turktools uses a naming convention whereby the *condition name* specifies the chosen value for each of the factors, separated by hyphens (9). Names of this form will be assumed by the *decoder*, which we will discuss in Appendix F.²¹ For our *there-construction* experiment, this results in conditions names as in the middle column of example (8), where the settings of the two factors are shown in the third column and the first column shows the actual sentence that we would like participants to rate.

(9) The structure of a condition name:

<factor 1 value>-<factor 2 value>-<factor 3 value>-...

An experiment is composed of different *sections*, where normally at least one section will be used as *fillers*, and the others will be *targets*. This designation is made when using the *Lister* (Appendix C). Each *item* in the items file has two parts, each beginning on a new line:²²

²¹ It is possible to use other naming schemes for condition names. In such a case, however, part of the decoding process, which is automated in the *Decoder*, will have to be done manually by the researchers. See footnote 28.

²² This structure is very similar to that used for items files in *Linger*, written by Doug Rohde (<http://tedlab.mit.edu/~dr/Linger/>), and Gibson et al.'s (2011) *Turkolizer*. Note that our terminology differs slightly: Gibson et al refers to a group of *trials* together forming an *item*, which corresponds to our notions of individual *items* which are grouped together into *item sets*.

Furthermore, the structure of the item body in our *Lister* format is much more flexible, allowing for an arbitrary number of fields. Unlike in *Linger* and Gibson et al.'s *Turkolizer*, comprehension questions are not given a special status but are instead treated like any other field that could be added to an item. If a comprehension question is given

- (10) a. **The item header.** The item header consists of four components, separated by spaces.
- (i) the symbol #;
 - (ii) the name of the *section* (e.g., *target* in the example in Figure 3);
 - (iii) the item set number within the *section* (we recommend 1, 2, 3, ...);
 - (iv) the *condition* name (e.g., *indef-no.there*, *def-no.there*, *indef-there*, *def-there* in our example). The condition names are not constrained in any way, but it is most helpful to use labels that reflect the experimental design, and in particular to describe the setting of the *factors* of interest for that item.
- b. **The item body.** The item body consists of *fields*, each on its own line.²³ Line *n* corresponds to the text that will be substituted for the text `{{field_n}}` in the skeleton file. A field may specify a sentence to be judged, choices for completions, a picture, an audio file, a context, a comprehension question, etc.

Note that the choice of experimental design and skeleton will dictate the format of your items. That is, each item must have at least as many fields as there are fields in the sample item in the skeleton that you have chosen. It is possible to add *hidden fields* to the body of an item by adding extra lines that do not have corresponding substitution tags in the HTML template. This is a way to specify additional information for a given item that is useful for the researchers but should not be available to the participants. For example, if a skeleton refers to `{{field_1}}` through `{{field_4}}` but not `{{field_5}}`, then anything that occurs in the 5th line (and onward) of an item's body will not be displayed on the screen and participants will not have access to this information. However, the data will still be part of the results file created by AMT after the experiment is completed and can be used as part of the data analysis. For example, the correct answers to comprehension questions or expected answers to filler items may be specified in this way.²⁴

The format for a sample item set in a *there*-construction study is given in Figure 5. For illustration, the experiment here pairs each sentence with a picture. Each item consists of two fields, the first specifying the sentence and the second, a picture.²⁵ This corresponds to two substitution tags in the `binary-image.skeleton.html` skeleton: `{{field_1}}` stands in for the sentence, and `{{field_2}}` for the URL in an `` tag, specifying the picture to be shown.

or if some filler items are expected to have correct answers, these values should be specified as *hidden fields* in the items file; see discussion following (10).

²³ If a line break is required within a single text field, use the HTML code `
`.

²⁴ If some items have more than one hidden field, it is important to make sure that each field is exclusively used for one purpose (e.g. field 5 for the correct answer to the item and field 6 for the expected answer to a comprehension question). It is possible to leave a field empty if a given item does not have a value associated with some field (e.g., no expected correct answer to an item, but there is an expected correct answer to the comprehension question—leave field 5 empty, as a blank line, and enter the expected correct answer to the comprehension question in field 6).

²⁵ Resources such as images and audio or video files must be hosted separately, rather than included with the AMT experiment. We recommend hosting such resources on your own web space, for example in a hidden directory on your website, and including links to those resources in the items.

```

# target 1 indef-no.there
A boy is in the room.
http://DOMAIN/experimentpictures/definiteness-effect/picture1.png

# target 1 def-no.there
The boy is in the room.
http://DOMAIN/experimentpictures/definiteness-effect/picture1.png

# target 1 indef-there
There is a boy in the room
http://DOMAIN/experimentpictures/definiteness-effect/picture1.png

# target 1 def-there
There in the boy in the room
http://DOMAIN/experimentpictures/definiteness-effect/picture1.png

```

Figure 5. Sample item set with four conditions in *Lister* format

C *Lister*: Creating randomized lists of items to be uploaded on Mechanical Turk

The *Lister* takes an items file as input and returns a comma-separated-value (.csv) format file with randomized lists of items that can be uploaded to AMT. AMT will combine this item lists file with the template created by the *Templater* to create the final survey that will be viewed by participants. When you run *lister.py*, the program will maximally ask for the following information:

- (11) a. the name of your items file (described in the previous section)
- b. which sections should be treated as fillers
- c. how many filler items you would like placed between each target item
- d. how many filler items you would like placed at the beginning and end of the experiment
- e. how many lists you would like to create
- f. whether or not you would like the reverse of each list to also be created, to help reduce any ordering effects that may occur

After this information is given, the *Lister* will create as many lists as requested, using a Latin Square design. That is, for each item set in a given section, an item for only one of the specified conditions for that item set will be included in a list. If the number of conditions does not match

for all item sets in a section, an error will be given. Note that if all the item sets in a particular section have only one item, they will all be included, regardless of the condition names given.²⁶

It is possible to dictate a minimum number of filler items to be placed between each two target items and at the beginning and end of each list, if there are enough filler items. The algorithm creates counterbalanced and randomized lists for each section individually (including the fillers), and then spreads fillers between target items to minimally comply with the constraints given to the *Lister*. If additional filler items are left after this process, they are randomly distributed across the list. If there are not enough filler items to comply with the constraints given to the *Lister*, an error message will appear. Note that it is possible to have less filler items than target items, but in that case it is not possible to impose restrictions on their position relative to target items. It is also possible to have no sections designated as fillers. In this case, all the items in the file will be randomized first within their sections and then across other sections, but no other conditions can be imposed on the ordering.

If some items have more fields than others (for example, if some items have expected correct answers but others don't), the *Lister* will produce a message notifying the user of the discrepancy. The user may choose to go back and check that the file is correct or to continue with the current file. Assuming no such issues, the *Lister* will output a randomized lists file in CSV format (xxxxxxx.turk.csv) that can be uploaded onto AMT. For example, if the input to the *Lister* is the items file definiteness-effect.txt, the output will be named definiteness-effect.turk.csv. The randomized lists file contains a row for each randomized list, indicating the actual text that the workers will see, with a header line at the top. AMT will substitute these strings into the HTML template for the participants to see.

D Simulator: Verifying that the survey works properly

With your items randomized into lists and your HTML template prepared, you are in principle ready to upload your survey onto AMT. However, before doing so, we recommend pre-testing your study using the *Simulator* script provided here. The *Simulator* takes as input a randomized lists file (xxxxxxx.turk.csv) and a template and creates a version of the survey based on one of the lists in the item lists file (you can choose which list to simulate). The *Simulator* allows researchers to bypass the rather cumbersome process of uploading a survey onto AMT, or using AMT's *Sandbox* to simulate an experiment.²⁷ The output of the *Simulator* is an HTML file that can be opened in any web browser.

²⁶ In a filler section where each item set is made up of one item each, it may be helpful to use different condition names even though all items will be displayed. This may help make the analysis script easier to create. For example, some fillers may be designated as 'catch' items. Accuracy can then be calculated for those items only and then used to discard participants from the analysis.

²⁷ Amazon Mechanical Turk's Sandbox allows researchers to upload "dummy" versions of their experiment, much like using the *Simulator*. However, to use the Sandbox it is necessary to set up the experiment independently on the Sandbox. This entire process must be repeated every time a mistake is discovered. Then one must go through all the

It is beneficial for researchers to complete their own study, for several reasons. Doing so helps spot any typos or errors in the rendering of the survey. If your items file includes hidden fields, you should make sure that all hidden fields are not displayed and all other fields are displayed as expected. Additionally, it is important to get a feeling for how hard the experiment is and how long it takes to complete it. This will help you determine payment for your HITs. Furthermore, because of the existence of *satisficing* behavior on AMT—the behavior of some workers to put in minimal effort and still get paid—it is useful to make sure that there are no easy strategies to complete the study without doing the linguistic task of interest. Strategies for dealing with such behavior include the addition of comprehension questions to items, the inclusion of ‘catch’ filler items that should have clear correct answers, and the use of diverse types of fillers that cannot all be answered using the same strategy.

E Uploading surveys onto Mechanical Turk and downloading results files

After verifying that the survey is ready, it can be uploaded onto AMT. We refer the reader to our online instructions on uploading surveys onto AMT: <http://turktools.net/use/turk.html>. In some cases it may be necessary to reject submissions from workers who have completed more than one survey (see footnote 16 above). It may also be desirable to reject workers with low accuracy on comprehension questions and ‘catch’ filler items and those workers who failed to complete at least a certain proportion of the study, e.g. 80%. To quickly identify workers who completed more than one survey, open the file in software such as Excel and sort by ‘WorkerId.’ Some suggestions and sample code for additional exclusion criteria and how to identify workers who meet them using R can be found in the analysis script `analysis.r` which is provided with *turktools* and can be modified by researchers to meet their own needs. In order to maintain a positive reputation as a requester on AMT, it is advisable to approve submissions in a timely fashion and to maintain a low rejection rate.

F Decoder: Preparing the results for analysis

After your survey is completed, download a final copy of the raw results file from the AMT *Manage* tab. We recommend re-naming this file, e.g. `definiteness-effect.results.csv` (to continue using the same example as above), and saving it in the same folder as the other documents produced in the course of preparing your survey. Use the *Decoder* script, which should be in the same folder. The *Decoder* will ask for the name of the raw results file (here: `definiteness-effect.results.csv`) and return a decoded file, here named `definiteness-effect.results.decoded.csv`.

Unlike the raw results file, the decoded results file contains one row for each *item* in each list in the survey. For each item, the decoded file specifies information about the Section, Condition, Item, List, PresentationOrder, and all fields and participant responses

same steps once again in order to create the actual survey on AMT; there is no way to transfer a survey from one platform to the other.

associated with that item, including hidden fields. In addition, the decoder adds a number of `Factor` columns, corresponding to different factor values. These factor values are constructed by simply splitting the `Condition` value up by hyphens.²⁸ For example, in our example where an item may have `Condition` value ‘`indef-no.there`,’ `Factor1` would be set to ‘`indef`’ and `Factor2` would be set to ‘`no.there`.’ This processing of condition names using the schema in (9) facilitates the analysis of the data later.

Metadata about a submission, including the `AssignmentId` (unique for each worker-survey pair), `SubmissionStatus`, `WorkerId`, `WorkTimeInSeconds` (for the entire survey) and answers to demographic questions, is duplicated for each item for a given worker in the file. Therefore, for each participant who worked on your survey there will be as many rows in the file as there were items in the survey,²⁹ and the meta-information about the submission will be the same in all rows from that submission.

Once decoded in this way, the results are ready to be analyzed by any standard statistics software. We have provided some basic code in the analysis script `analysis.r`, but researchers should adapt the script for their own needs.³⁰

G Hosting AMT-style experiments on your own server with *turkserver*

In addition to posting an experiment on AMT, the tools we have provided with this paper can be used to generate surveys to be hosted on the researchers’ own server. In order to do so, we have developed a program called *turkserver*, freely available at <http://turktools.net/use/server.html> under a liberal open-source license. *Turkserver* requires a server capable of serving PHP scripts, and is designed for Apache web servers. See the online documentation for detailed instructions on installation and usage.

To use this option, construct the experiment as described in Appendix A-D. An experiment is set up with *turkserver* by uploading the template and item lists file (`.turk.csv`). A URL for the experiment is generated, and this URL can then be shared with potential participants. *Turkserver* handles the random assignment of participants to different lists, displaying the survey using the chosen list of items, and recording the results in a format compatible with AMT’s results files.

There are some differences between running an experiment on AMT and on *turkserver*. AMT comes with many potential participants registered on the system, and therefore acts as a subject

²⁸ If condition names were not constructed using factor names and hyphens, as suggested in (9), custom code may be needed in the analysis script to recover factor values from the value of the `Condition` column.

²⁹ But note that if a worker completed two surveys, for example, there will be twice as many rows. All the rows corresponding to the first survey completed by this worker will share metadata pertaining to the first submission and all rows corresponding to the second survey will share metadata pertaining to the second submission. The `AssignmentIds` will be distinct, but the `WorkerId` will be the same across these rows. This allows us to easily identify workers who completed multiple surveys. At the time of writing, AMT cannot itself enforce that each worker only complete one survey per logical experiment.

³⁰ See also some analysis suggestions on the *turktools* website at <http://turktools.net/use/analysis.html>.

recruitment tool as well. On the other hand, the potential participant pool is limited to those people who have chosen to sign up to be a worker on AMT. With *turkserver* it is up to the experimenter to recruit subjects and send them to the experiment URL. Similarly, unlike AMT, *turkserver* does not handle payment to participants. *Turkserver* does, however, attempt to produce a unique AssignmentId for each submission, as AMT does, and to produce a WorkerId for each participant that is stable across experiments.

Running AMT-style surveys on *turkserver* can be useful for situations where the AMT subject pool does not include many speakers of a particular language, but such speakers can be recruited separately. It is also ideal for when the experimenter wishes to recruit participants from a particular group, such as a vetted subject pool, a class, or among colleagues. Furthermore, the ability to generate experiments that run both with and without AMT offers great flexibility. For example, one could use the exact same experimental materials (template and item lists file) and conduct the experiment with the general public on AMT, and also on recruited non-naïve (working linguist) participants via *turkserver*, and compare their behavior.