8 Tips for Designing Effective Surveys

Wait... are you ready for a survey?

A Survey is most useful when you...

- Have a specific **goal**
- You have resources to **act** on survey results
- **Know your audience** & know how to reach your audience
- Have the **support** (question design, analysis)

A Survey is not useful when you..

- Are exploring a brand new topic (*try interviews/focus groups instead*)
- Don't have support if you don't have experience (find a mentor!)
- Don't know your audience or don't know how to reach them
- Have a small or simple project; interviews or collaboration might be better

Anything else?

1. Always start with survey goals

- What is the overall project a survey will support?
- How will data from a survey support this goal?
- Develop 1 to 3 *specific* goals for your survey
  - Develop questions for each goal

1. Always start with survey goals

Example:

Wikimedians of Greenland want to support their local community, but don't know what their community needs or thinks of them. Data from a survey can help to learn:

- *The needs of the community*
- *The level of satisfaction with WM Greenland's projects*

2. Surveys measure self-report

- **Self-reported data:**
  - **Attributes**
    - Demographic data (e.g. occupation, gender)
  - **Attitudes**
    - Opinions about open culture
  - **Behaviors**
    - Past or current Activities
  - **Knowledge**
    - Awareness of WikiProjects, learning concepts

- **Surveys don't measure facts;** everything is self-reported
- **Surveys measure future activities poorly,** but you can measure current interest

2. Surveys measure self-report

Example: What kind of data?

What kind of data is each question after? Attitudes, Attributes, Behaviors, or Knowledge?

- Over the last month, how many times did you edit Wikipedia?
- In the next month, how many times do you plan to edit Wikipedia?
- To what extent were you satisifed or dissatisfied with the conference overall?
- For each of the following tools, to what extent was it easy or difficult to use?
- Before this survey, did you know that the Wikimedia Foundation is a non-profit organization?
- Which gender do you identify with?

3. Have specific, concise questions

Poor   Did you attend the March edit-a-thon series regularly?

Better   Which, if any, of the edit-a-thon series in March did you participate in? Choose all that apply:

- Time is often missed; make sure to include a specific time frame
- Don't get too wordy. Get to the point quickly

4. Avoid double-barreled questions

Poor   Have you ever edited Wikipedia and Commons before this workshop?

Better   - Have you ever edited Wikipedia?

- Have you ever uploaded a photo to Wikimedia
  Commons?

- Have you ever edited Wikimedia Commons?

- Watch out for the words: "and", "or"
- Don't double barrel responses either!

5. Avoid jargon or abbreviations - write out or explain them.

Poor   To what extent are you satisfied with using Visual Editor?

Better   To what extent are you satisfied with using Visual Editor, (e.g. the new tool that allows you to edit an article directly)?

- If you run into a concept, it is better to explain it with different words

6. Ask neutral and fair questions

Poor   Don't you agree that laptops should be available for use at every editing workshop?

Better   To what extent do you agree or disagree that laptops should be available to use at every editing workshop?

- Use both positive and negative adjectives (e.g. satisfied/dissatisifed, difficult/easy) in the question
- "To what extent" helps you stay balanced

7. Think of questions as 2 parts

Question	How many hours, if any, do you plan to edit Wikipedia in the next week?
Response options	○ None ○ Less than 2 hours ○ 2 to 5 hours ○ 6 to 10 hours ○ 11 or more hours *The other half of writing a question is choosing a good response option!*

8. Response options are crucial

Which activity of the following activities did you spend the most time during the Editathon?

Poor
- I edited any project
- I uploaded an image to commons
- I was creating a talk page
- I was not able to attend

Better
- I edited Wikipedia
- I uploaded an image to commons
- I created a talk page
- Other

- Other (specify) and Not applicable, are very helpful

Quick review of response types

- **Structured (fixed response)**
  - Pairs
  - Multiple Choice
  - Check all that apply
  - Ranking
  - Scales

- **Non-structured (open-ended)**
  - Fill in blank
  - Open-ended

Resources: Survey Support Desk

https://meta.wikimedia.org/wiki/Surveys

Resources: Survey Support Desk

What is in the Survey support desk?
- Strategy, management, and communications
- Reaching people with surveys
- Writing and designing questions
- Privacy and data
- Analyzing and sharing survey results

Trying to find someone with survey experience?
- Use Category:Survey skills on meta to find people who have done surveys!
- Email Edward Galvez at surveys@wikimedia.org for consulting support or **access to qualtrics**

Survey Goal Activity

Is anyone currently or plans to do a survey?

If not, let's use this example:

Wikimedians of Greenland want to support their local community, but don't know what their community needs or thinks of them. The programs they run are wiki loves monuments and the education program. They also have some volunteer developers as well.

Survey Goal Activity (if time allows)

- What is the goal of the project the survey will inform?
- Let's start broad: what is the goal of the survey?
- Let's get more specific: What kind of data do you need for the survey?