GESIS Panel Survey Style Guide

Please make sure to use the most recent version of this document, which can be found here.

In this document, you will find references to the following additional materials, which we recommend that you retrieve from here:

- GESIS Panel Proposal Submission Procedure
- GESIS Panel Survey Style Guide
- GESIS Panel Proposal Submission Checklist
- GESIS Panel Review Criteria
- GESIS Panel Questionnaire Design
- GESIS Panel General Terms and Conditions
- GESIS Panel Proposal Submission Form
- GESIS Panel Primary Researcher Unipark License Request Form
- GESIS Panel_template_submission

GESIS Panel Website:
http://www.gesis-panel.org

GESIS Panel in Social Media:
https://www.facebook.com/GESISPanel
https://twitter.com/GESIS_Panell

Contact E-Mail:
info@gesis-panel.org
GESIS Panel Survey Style Guide

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1. Aim and structure of the GESIS Panel Style Guide

This document provides guidance for researchers who are planning to create a questionnaire in the Unipark survey development environment for submission to the GESIS Panel. It begins by outlining general rules relating to GESIS Panel questionnaires (1.1 & 1.2). It then gives an overview of the general structure of GESIS Panel online questionnaires (2.). Subsequently, it provides a broad overview of question formats that are accepted by the GESIS Panel (3.3) and it gives instructions on how to implement various question types in Unipark. Finally, it gives general advice on how to formulate survey questions for the GESIS Panel (3.4 & 3.5).

The GESIS Panel Team provides a template of a Unipark-questionnaire “GESISPanel_template_submission.gpx-file” preprogrammed with the GESIS Panel layout. The template contains examples of all the question types described below. Researchers submitting proposals via email (info@gesis-panel.org) should use the template provided. Please do not change any layout settings.

1.1 Basic rules of questionnaire design

The GESIS Panel can only accept studies if the survey instruments comply with the standards of the questionnaire design in the social science. We would urge you to evaluate survey items systematically using pretest techniques. We recommend the following literature, which advices you on the design and evaluation of questionnaires.

(1) GESIS Survey Guidelines:

(2) GESIS Survey Guidelines, Rating Scales:

(3) Literature:


(4) **Question Appraisal System (QAS):**

- The so-called **Question Appraisal System (QAS)** is a helpful and easy-to-use tool for identifying and correcting potential problems with draft questionnaire items. This method is based on a step-wise evaluation of specific categories of question characteristics. The QAS template can be found here: [http://www.websm.org/uploadi/editor/1364216022Willis_Lessler_1999_QAS_99.pdf](http://www.websm.org/uploadi/editor/1364216022Willis_Lessler_1999_QAS_99.pdf)


### 1.2 General remarks: Offline mode as the lowest common denominator

The GESIS Panel is a mixed-mode panel that implements online and paper-and-pencil questionnaires. The offline mode limits the style and technical possibilities of the questionnaire. This has several implications:

- Not all question types that can be implemented in Unipark are accepted in the GESIS Panel (see section 2.3 below).
- As a matter of principle, we do not force respondents to provide an answer. Moreover, they may skip a question without further probing.
- A “back-button” is included by default.
- A “don’t know” category is not offered by default. However, it may be included if it is a substantive answer (e.g., in the case of knowledge questions) or if the researcher has other reasons for including it (e.g., comparability; for details of implementation, see section 4).
- Generally, we apply a one-page-per-question design. However, if two or more questions are logically related, it is possible to implement more than one question per page. The number of questions that can be implemented on one screen depends on the length of the questions.
- Filter questions should be avoided; they are permitted only in exceptional cases. As an alternative to a filter question, a “does not apply” category should be included.
- Randomization of either questions or items is not possible. However, random assignment to experimental groups is possible. The GESIS Panel accepts a maximum of four experimental groups.
- Plausibility checks are not possible.
- Inclusion of multimedia elements is not possible.
- Dependent interviewing is not possible.
- Please remember: The duration of submitted questionnaires should not exceed five minutes.
2. GESIS Panel online questionnaire

The GESIS Panel online questionnaire follows the same structure in each panel wave: It starts with a welcome page (1), which is followed by a second page (2) with instructions, and then the questions of the GESIS Longitudinal Core Studies (3) and various submitted studies (4). At the end of the questionnaire, several survey evaluation questions (5) are included, and finally, an end page (6) finishes the questionnaire.

2.1. General structure of the questionnaire

(1) Welcome page

On the first screen, respondents are welcomed to the survey. No topic is mentioned, only the specific month (e.g., “October/November Survey”). Information is provided about duration of the survey, incentives, and data protection.

Figure 1: Example of a welcome page
(2) Second page

On the second page, general instructions about filling out the survey are provided.

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Figure 2: Example of a second page with general instructions

(3) Longitudinal Core Studies

Subsequently, the Longitudinal Core Studies of the GESIS Panel are implemented. Each of these studies covers topics of general social research interest, such as socio-demographic variables or subjective well-being questions. Details on each study and the annual fielding schedule of the Longitudinal Core Studies can be found [here](#).

(4) Submitted Studies

Following the Longitudinal Core Studies, submitted studies are implemented.

(5) Standard survey evaluation items

At the end of every wave of the GESIS Panel, a set of standard survey evaluation items is implemented (the full set of survey evaluation questions can be found in the Appendix below).
(6) End page

The final page thanks the respondent for participating in the survey and provides information about the approximate date of the invitation to participate in the next survey.

Figure 3: Example of an end page
2.2. General structure of questions

A question may consist of the following elements, however not all elements must be used in every question (see Figure 4):

I. Introduction preceding the question (“descriptive text”)
II. Question text (boldface type)
III. Instruction/explanatory text
IV. Answer categories/options

2.2.1 Introductory text [Unipark question type: 998]

The introductory text of a question should be programmed separately as a 998-type question and placed on the same page as the question. Boldface formatting should not be used in introductions. If you wish to highlight a word or a phrase within the introduction, please underline it. Italics should not be used for highlighting.
2.2.2 Instructions

Instructions should follow or precede the question text. Boldface formatting should not be used in instructions. To highlight a word or a phrase within the instructions, underlining should be used.

2.3. Accepted question types

There are several types of questions that you can choose from. Please note that, due to the mixed-mode character of the GESIS Panel, only a standard subset of the question types available in Unipark is permitted. All question types that are accepted within the GESIS Panel are listed and described below. All questions that are shown in the screenshots can be found in the Unipark template: “GESISPanel_template_submission.gpx”.

Please import this template before you generate your survey (see “GESIS Panel Proposal Submission Procedure” for details).

Accepted question types:

- Single-choice questions [Unipark question types: 111, 113] (see 2.3.1)
- Multiple-response questions [Unipark question types: 121, 122] (see 2.3.2)
- Open-ended questions [Unipark question types: 141, 142, 143, 144] (see 2.3.3)
- Standard matrix questions [Unipark question type: 311] (see 2.3.4)
- Semantic differential questions [Unipark question type: 340] (see 2.3.5)
- Advanced questions – user-defined [Unipark question type: 911] (see 2.3.6)

2.3.1 Single-choice questions [Unipark question types: 111, 113]

(1) Single-response list (vertical) [Unipark question type: 111]

- Items in single-response lists and vertical scales should start with a capital letter.
- If an item is a full sentence, it should end with a full stop.
- If an item is a continuation of the question, the question should end with an ellipsis, and the item should start with an ellipsis (see Figure 6).
- The “don’t know” category or other “does not apply” categories that do not form part of the scale should be set in italics. In vertical response lists, these categories should be visually separated by a blank line.
- Alternating colors should not be used in single-response lists.
- An open-ended response category may be included (see Figure 7).
Im Vergleich dazu, wie andere hier in Deutschland leben:

Glauben Sie, dass Sie Ihren …

- ... gerechten Anteil erhalten,
- ... mehr als Ihren gerechten Anteil,
- ... etwas weniger oder
- ... sehr viel weniger?

Figure 6: Example of a single-choice question where the items are a continuation of the question

Es gibt unterschiedliche Quellen, aus denen man sich über Politik informieren kann.

Woher bekommen Sie aktuell die meisten Informationen über die Politik und die Parteien?

- Fernsehen
- Zeitung
- Radio
- Internet
- Personliche Gespräche
- Andere Quelle, und zwar: 

- Ich informiere mich aktuell nicht.

Figure 7: Example of a single-choice question (vertical) with an open-ended response category

Wie zufrieden sind Sie mit der Arbeit der Bundesregierung bei der Bewältigung der Wirtschaftskrise in Europa?

- Sehr zufrieden
- Zufrieden
- Teils/teils
- Unzufrieden
- Sehr unzufrieden

Figure 8: Example of a single-choice question (vertical)
(2) Single-response list (horizontal) [Unipark question types: 113, implemented as 311]

- Single-choice questions with a horizontal response scale should be implemented as a matrix question with one item left blank. Please see the screenshot of the Unipark implementation below for details (Figure 9).
- Response options of horizontal scales should not be capitalized. The response options should be placed above the scale.
- The “don’t know” category or other “does not apply” categories that do not form part of the scale should be set in italics (see Figure 10).
- The “don’t know” category should be marked in Unipark as a missing value (see section 3.5, Implementation of the “don’t know” category).
- A maximum of eleven scale points should not be exceeded.

Figure 9: Unipark implementation of a horizontal single-choice question as question type 311
Wie wichtig ist es Ihnen aktuelle und modische Kleidung zu tragen?

überhaupt
nicht wichtig
nicht so wichtig
weder noch
wichtig
sehr wichtig

Figure 10: Example of a single-choice question (horizontal)

Eine Partei kann nur in den Bundestag einziehen, wenn sie mindestens 5% der Zweitstimmen erhält - außer sie gewinnt in drei oder mehr Wahlkreisen die meisten Stimmen.

Auf wie viel Prozent sollte diese Hürde gesenkt oder erhöht werden, oder sollte sie gleich bleiben?

0% 1% 2% 3% 4% gleich 6% 7% 8% 9% 10% weiß nicht

Figure 11: Example of a single-choice question (horizontal) with a "don't know" category

Wie zufrieden sind Sie - alles in allem - mit der Art und Weise, wie Demokratie in Deutschland funktioniert?

äußerst unzufrieden
1 2 3 4 5 6 7 8 9 außerst zufrieden

Figure 12: Example of a single-choice question (horizontal)
2.3.2 Multiple-response questions [Unipark question types: 121, 122]

- Vertical arrangement of the items is preferred.
- In exceptional cases, it is also possible to choose the horizontal arrangement of the items or a combination of both (e.g., two columns).
- As in the case of single-choice questions, vertical-scale items should start with a capital letter and, if they are full sentences, should end with a full stop.

![Image](Figure 13: Example of a multiple-response question (vertical))

2.3.3 Open-ended questions (fields for text input) [Unipark question types: 141, 142, 143, 144]

Due to the limitations of the paper-and-pencil mode, there are restrictions on the number of open-ended questions that we can integrate into one wave questionnaire and on the size of the text field provided for the answer. A typical open-ended question in a standardized questionnaire provides an answer field for single words or numbers (see Figure 14 and Figure 15). The rule of thumb for longer open-ended questions is to provide a maximum of five lines in the answer field (see Figure 15).

The width of the multiple-line textbox should be limited to 80.

The number of open-ended questions and the size of the textbox should be discussed with the project manager responsible for the wave.
Wie viele Stunden schlafen Sie nachts an einem normalen **Werktag**?

Stunden

Wie viele Stunden schlafen Sie nachts an einem normalen **Tag am Wochenende**?

Stunden

**Figure 14: Example of a numerical open-ended question**

Und in welcher **Region** leben Sie?

**Figure 15: Example of a single-line open-ended question**

Haben Sie noch weitere **Anmerkungen**?

Hier können Sie Lob oder Kritik äußern. Bitte bedenken Sie, dass wir Ihnen aus Datenschutzgründen hierzu nicht persönlich antworten können. Geben Sie in dieses Feld aus diesem Grund auch bitte keine Telefonnummer oder andere Kontaktdaten ein. Wenn Sie Fragen haben, können Sie uns gerne unter 0621-1246 564 anrufen oder eine E-Mail an info@gesis-gesellschaftsmonitor.de schreiben.

**Figure 16: Example of a multiple-line open-ended question**
2.3.4 Standard matrix questions [Unipark question type: 311]

- The size of the matrix question depends on the length of the individual items. The general rule of thumb is that the matrix should fit on a single screen without scrolling.
- A matrix question should not exceed 10 items. For the online mode, the GESIS Panel Team may require that a matrix question be split into two consecutive pages.
- The number of scale points should not exceed seven.
- An item should start with a capital letter and, if it is a full sentence, should end with a full stop.
- If an item completes a sentence, it should start with an ellipsis and end with a full stop.
- It is not advisable to use matrix questions where items are continuations of the question and end with a question mark. It is advisable to rephrase the question so that no question marks are needed at the end of the items.
- If a matrix question contains more than three items, alternating colors should be used.

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Nun kommen einige allgemeine Aussagen, die zur Beschreibung von Personen verwendet werden können. Diese Aussagen können auf Sie persönlich mehr oder weniger zutreffen.

Bitte geben Sie bei jeder Aussage an, inwieweit die Aussage auf Sie selbst zutrifft.

<table>
<thead>
<tr>
<th>Ich schenke anderen leicht Vertrauen, glaube an das Gute im Menschen.</th>
<th>trifft überhaupt nicht zu</th>
<th>trifft eher nicht zu</th>
<th>weder noch</th>
<th>eher zutreffend</th>
<th>trifft voll und ganz zu</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Ich habe nur wenig künstlerisches Interesse.</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Ich neige dazu, andere zu kritisieren.</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Ich habe eine aktive Vorstellungskraft, bin fantasievoll.</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

![Figure 17: Example of a matrix question](image)
2.3.5 Semantic differential questions [Unipark question type: 340]

- The general rule of thumb for the number of items in the semantic differential question is that the question should fit on a single screen without scrolling. This is the case when a semantic differential question does not exceed 15 single-word items.
- For the online mode, the GESIS Panel Team may require that semantic differential questions be split into two consecutive pages.
- The number of scale points should not exceed seven.

Figure 18: Example of a semantic differential question

2.3.6 Advanced questions – User defined [Unipark question type: 911]

User-defined questions should be used only in exceptional cases. The GESIS Panel Team has no resources to provide any support for user-defined questions. Please use only HTML, not JavaScript.
3. General remarks

- To emphasize a word within an introduction, question or remark, underlining should be used.

- Variable name convention: The GESIS Panel Team will rename your variables according to the naming convention of the GESIS Panel. Variable names or labels may be either in English or in German.

- If you are using a scale labeled with numbers, never use the value “0” as a variable code, even if the scale starts with “0”, because “0” is defined as a missing value in Unipark. Values should start with 1. You can label the value “1” as “0” (see example of a “single_choice_horizontal_0 scale” in the template).

- Codes for missing data: Unipark has standard codes for missing data (-66, -77, and 0). These codes should not be changed in the online questionnaire submitted.

4. Implementation of the “don’t know” category

We do not recommend using a “don’t know” option. However, it may be used if it is a substantive category (in the case of knowledge questions) or for comparison purposes if a question is replicated from other survey.

In vertical response lists, the “don’t know” category and similar “does not apply” categories that do not form part of the scale should be set in italics and be visually separated by a blank line.

Figure 19: Example of a “don’t know” category in a vertical scale

In the case of horizontal response lists, it suffices to set the “don’t know” category in italics.
Figure 20: Example of the “don’t know” category in a horizontal scale

Code “98” should be assigned to an explicitly offered “don’t know” category. The “don’t know” category should be marked in Unipark as a missing value (see Figure 21).

Figure 21: Unipark implementation of the “don't know” category

Implement the blank line as “inside title” and fill in &nbsp;

Set the “don’t know” in italics with <i> and </i> and mark it as a missing value.
Appendix

Standard survey evaluation items

Figure 22: Survey evaluation questions: Evaluation of several aspects of the questionnaire (here: “How did you find the questionnaire?”)

Figure 23: Survey evaluation questions: Comprehensibility of questions

Figure 24: Survey evaluation questions: Difficulty of answering the questions
Wie hat Ihnen die Befragung insgesamt gefallen?
überhaupt nicht  nicht so gut  mittelmäßig  gut  sehr gut

Figure 25: Survey evaluation questions: Overall evaluation

Wie lange haben Sie gebraucht, um den Fragebogen auszufüllen?
Bitte geben Sie eine Schätzung ab.

Minuten

Figure 26: Survey evaluation question: Estimated duration

Haben Sie die Teilnahme unterbrochen?
○ Nein, ich habe an einem Stück teilgenommen.
○ Ja, ich habe die Teilnahme für insgesamt Minuten unterbrochen.

Figure 27: Whether the respondent interrupted the answering process.
Waren Sie bei der Beantwortung der Fragen allein oder waren weitere Personen anwesend?

- Ich war allein.
- Andere Personen waren anwesend.

Von wo aus haben Sie an dieser Befragung teilgenommen?

- Von Zuhause
- An einem anderen Ort

Mit welchem Gerät haben Sie die Fragen beantwortet?

- PC bzw. Laptop
- Tablet-PC
- Smartphone
- Anderes Gerät, und zwar:

Figure 28: Presence of others while answering the questions, place where the questionnaire was filled out, device used to fill out the questionnaire

Haben Sie noch weitere Anmerkungen?

Hier können Sie Lob oder Kritik äußern. Bitte bedenken Sie, dass wir Ihnen aus Datenschutzgründen hierzu nicht persönlich antworten können. Geben Sie in dieses Feld aus diesem Grund auch bitte keine Telefonnummer oder andere Kontaktdaten ein. Wenn Sie Fragen haben, können Sie uns gerne unter 0621-1246 564 anrufen oder eine E-Mail an info@gesis-gesellschaftsmonitor.de schreiben.

Figure 29: Text field for feedback