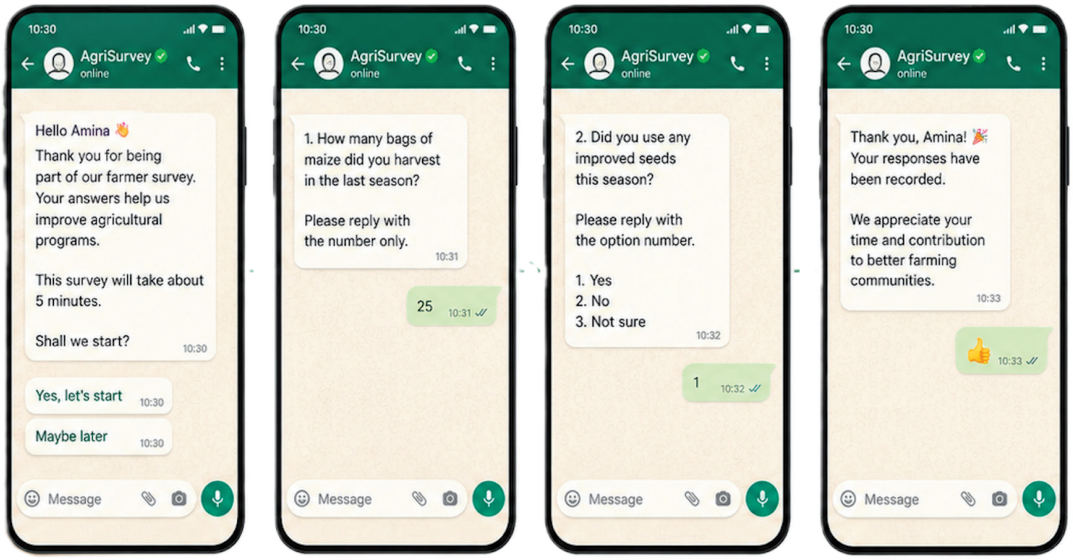
COSA Committee On Sustainability Assessment

Sustainability Intelligence

WhatsApp Using Surveys Guideline

Programme	Agile Data
June 2026	
Publication Code	**SI-G-003**
Version 1.0	

Instant messaging such as WhatsApp is a widely used messaging platform that can be leveraged as an agile data collection approach. It enables organizations to engage respondents through short surveys, sharing multimedia content, and getting feedback through a familiar and accessible interface. Its broad global consumer adoption and ease of use make it a practical tool for collecting timely information and maintaining communication where smartphones and network coverage are available.



What Agile Data Tested

The Agile Data Approaches and Innovations for Monitoring (ADAIM) project explored the viability of instant messaging as a tool for monitoring and evaluation in agricultural development programs. Through a pilot implementation in Zimbabwe, ADAIM assessed WhatsApp's potential to collect timely, low-cost data directly from farmers. Specifically, it was used to measure the drivers and the barriers of farmer adoption of dual-purpose poultry. This pilot generated valuable lessons on the effectiveness, limitations, and operational considerations of using instant messaging as a tool for agile data collection. While these lessons provide useful implementation guidance, they are drawn from a single pilot and should be validated through additional applications in different contexts.

What we learned

One of the clearest lessons from the pilot was that WhatsApp can be a practical data collection tool, but participation is a challenge. The survey achieved a response rate of **36%** which is comparable to response rates commonly reported for mobile and web-based self-administered surveys. This suggests that some farmers are willing to engage through a messaging platform, but others do not respond, decline to participate, or begin the survey without completing it. As with other self-administered survey methods, non-response bias remains an important consideration when interpreting the results.

Key challenges:

- Non-response:
  - **Unreachable** phone numbers
    - Recipients who did not respond to the invitation.
    - **Incorrect** phone numbers
    - Participant **refusal**
    - **Partial completion** (survey dropout)
  - Time lapse between start and end of the survey

At the same time, the pilot revealed a major advantage of surveys using WhatsApp: the cost. In our pilot the average cost per completed survey was approximately **USD 7**, representing an **89% reduction** compared with traditional face-to-face surveys. These findings suggest that, despite lower response rates, WhatsApp surveys can offer a highly cost-effective alternative for collecting data from well-defined target populations, particularly when rapid implementation, frequent monitoring, or limited budgets are key considerations.

Best use cases

Good For	Less Suitable For
Short surveys, high- frequency monitoring	One-off comprehensive baseline or endline which requires sustained attention
Feedback loops & follow up surveys	Reaching new farmers without existing contact information
Farmers who regularly use smartphones and instant messaging	Farmers with limited smartphone access, poor connectivity, or low digital literacy
Data collection under tight budget constraints	
Sharing multimedia (images, documents, voice notes, videos) alongside surveys	

Design considerations

When designing a survey for **WhatsApp**, the questionnaire and user experience need to be adapted to the characteristics of a mobile messaging platform. The main **design considerations** include:

1. **Keep the survey short**
    - Limit interview length (ideally 10–15 minutes).
    - Prioritize essential questions to reduce farmer fatigue and dropout.
2. **Use simple and concise wording**
    - Use farmers' preferred local language
    - Avoid technical jargon and long question stems.
    - Write questions that are easy to read on a smartphone screen.

3. **Optimize for mobile devices**
    - Present one question at a time.
    - Minimize scrolling and long response lists.
4. **Limit open-ended questions**
    - Prefer closed-ended questions (single or multiple choice).
    - Use open-ended questions only when necessary.
5. **Use clear response options**
    - Keep answer categories short and mutually exclusive.
    - Where possible, use numbered response options (e.g., “Reply with 1, 2, or 3”).
6. **Provide clear instructions**
    - Explain how to complete the survey.
    - Inform farmers about the estimated completion time.
    - Include instructions on how to resume the survey if interrupted.
7. **Design for interruptions**
    - Recognize that farmers may complete the survey in multiple sessions.
    - Allow farmers to return to where they left off, if the platform permits.
8. **Use reminders strategically**
    - Send polite reminder messages to non-respondents.
    - Avoid excessive follow-ups that could reduce willingness to participate.

Operational considerations

Operational considerations when using **WhatsApp for survey data collection** include technical, logistical, ethical, and implementation aspects that can affect survey performance and data quality. Key considerations include:

1. **Respondent recruitment and contact lists**
    - Ensure phone numbers are accurate and up to date.
    - Verify that respondents have access to WhatsApp and consent to being contacted.
    - Develop procedures for updating incorrect or inactive numbers.
2. **Survey design**
    - Keep questionnaires short and mobile-friendly.
    - Use simple language and minimize open-ended questions.
3. **Timing of message delivery**
    - Send invitations at times when respondents are most likely to be available.
    - Avoid periods of high agricultural workload or holidays.
    - Consider local time zones and daily routines.
4. **Follow-up and reminders**
    - Schedule reminder messages for non-respondents.
    - Limit the number of reminders to avoid fatigue.
    - Monitor response rates and adapt follow-up strategies if needed.
5. **Enumerator or helpdesk support**
    - Provide farmers with a contact person or helpline for technical or survey-related questions.
    - Respond promptly to queries to reduce survey abandonment.
6. **Data quality monitoring**
    - Identify questions that cause high levels of non-response or abandonment.
    - Monitor survey duration and inconsistent responses.

7. **Monitoring implementation**
    - Monitor delivery, response, refusal, and completion rates in real time.
    - Keep records of operational issues (e.g., invalid numbers, connectivity problems, respondent complaints) to improve future survey rounds.

These operational considerations help maximize response rates, improve data quality, and ensure that WhatsApp surveys are implemented efficiently and ethically, particularly in low-resource and rural settings.

Key takeaway

WhatsApp is unlikely to replace in-person surveys for every purpose, but it can be a highly cost-effective option for collecting timely data from well-defined target populations. For programs that need rapid feedback, regular monitoring, or data collection under tight budget constraints, the trade-off between participation and cost may be well worth considering.

These findings are consistent with the broader literature on mobile and WhatsApp-based surveys, which identifies non-response, selection bias, and questionnaire completion as the primary limitations of this data collection method.

- WhatsApp is best viewed as a complementary monitoring tool.
- The biggest advantage is cost efficiency.
- The main limitation is participation.
- Success depends on survey design and operational preparation
- WhatsApp works best when you already have an established relationship with farmers

WhatsApp
Using Survey
Lessons From The Field

The Agile Data Approaches and Innovations for Monitoring (ADAIM) project explored the viability of instant messaging as a tool for monitoring and evaluation in agricultural development programs. Through a pilot implementation in Zimbabwe, ADAIM assessed WhatsApp's potential to collect timely, low-cost data directly from farmers. More specifically, it was used to measure the drivers and the barriers of farmer adoption of dual-purpose poultry within the World Poultry Foundation program.

In the first wave, the survey was sent via WhatsApp to all **24 Field Service Representatives (FSRs)**, and **12 of them completed it** for a response rate of 50%.

A second wave of WhatsApp surveys were conducted within the same project with the **255 Mother Units**, who are farmers receiving specialized training in raising chicks during their first months of life. In this case, **93 completed the survey** for a response rate of 36%.

The main challenges encountered were that overall **18%** of the farmers **received** the survey but **did not start it, 16% refused to participate, 8% started** the survey but **did not complete it, and 2%** had an **incorrect phone number**. Therefore only **38% of the original sample responded to the survey.**

The pilot highlighted the importance of careful preparation before launching a WhatsApp survey. Providing the questions in farmers' preferred local languages (Shona and Ndebele) as well as English, made the survey more accessible and easier to understand. Informing farmers through local field agents also helped build awareness and trust before survey invitations were sent. In addition, a modest incentive (USD 2.50 per completed survey) was used to encourage participation.

Despite the challenges of non-response and survey completion, the pilot demonstrated that WhatsApp can generate useful programmatic insights at a fraction of the cost of traditional data collection. The survey provided actionable evidence on the drivers and barriers of farmer adoption of dual-purpose poultry, captured direct feedback from farmers, and enabled monitoring of key program outcomes such as dietary diversity, business profitability, and income inequality. These findings suggest that WhatsApp can be a valuable tool for rapid learning and adaptive program management, particularly when the objective is to track trends, gather beneficiary feedback, and inform implementation decisions in a timely and cost-effective manner.

Published by

COSA

Committee on Sustainability Assessment (COSA)

Editorial and production support
Afronaut Press

Authors and Contributors
Authors: Elena Serfilippi, COSA
Emilie Akkermans, COSA
Editor: Louise Salinas, COSA

Programme
Agile Data Approaches and Innovations for Monitoring (ADAIM)

Funding Acknowledgement

Gates Foundation

This publication was developed under the ADAIM programme, funded by the Gates Foundation.

Copyright
© Committee on Sustainability Assessment (COSA), 2026. All rights reserved.