

# Introduction to Survey Research and Qualtrics

## MSc Research Skills

# Sign Up For Qualtrics

- Go to: **csbh.uk/qts**
- Download the slides/workbook & sample images
- Follow the wiki link & log in with your University username and password
- Follow the instructions on setting up an account
- The self-enrolment code is: **nuCBg**
- Use your university email address for Qualtrics
- Check your spam folder for the verification email

# Session Outline

## Surveys:

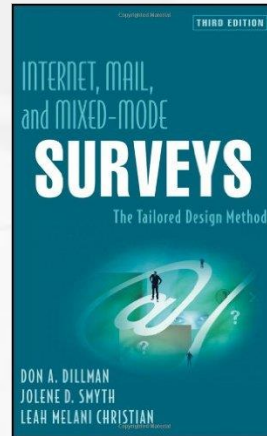
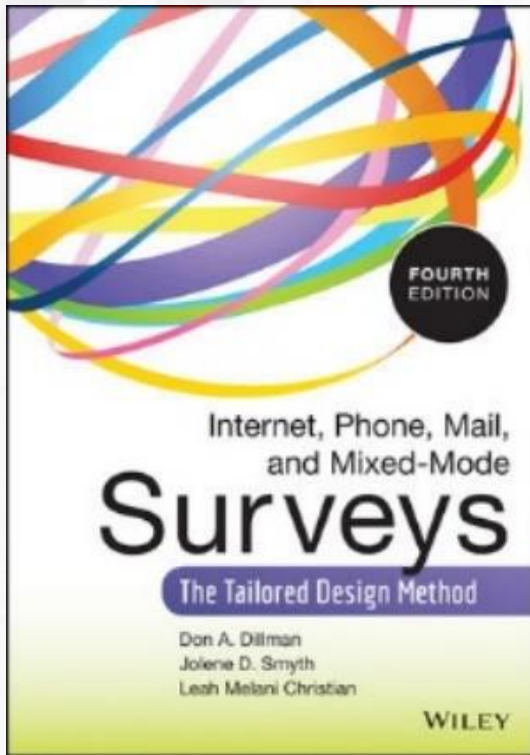
- When to use surveys
- How to set up surveys
- How to write suitable questions

## Qualtrics:

- How to register
- How to set up a survey
- How to launch
- Tips to make Qualtrics work for you

- This only covers what you are likely to need to know

# Textbook



- Internet, Phone, Mail and Mixed-Mode Surveys: The Tailored Design Method
- ISBN: 978-1-118-45614-9
- You do not need to adhere to TDM
- The Third Edition will probably do and it's cheaper



# Why Surveys?

- Collect data on knowledge, opinion, behavior & attributes
- Used for descriptive, explanatory or exploratory research
- Can be cross-sectional or longitudinal
- There is always a person at the end, answering questions
- You get the same information from everyone

# Sampling

- Whom are you going to survey?
- Does the survey need to be representative?
- Is there a list you can use?
- How will you get access?
- Is there anything specific about your sample that you will need to accommodate?
- Can the people in your sample answer the questions you need to ask?

# Measurement

- What information do you need to capture?
- How can this be measured quantitatively?
- How will you ask each question?
- What analyses do you want to run?

# Example

The research question is:

*“how does education affect well-being”*

So consider:

- What are the research domains?
- What are the measurable constructs?
- How can they be measured?



# Education

# Well-Being

## Formal

## Informal

## Financial

## Mental

## Physical

Number of years

Public or private

Size of school

Classes taken

On the job training

Apprenticing

Workshops

Mentoring

Income

Savings

Debt

Home ownership

Life satisfaction

Depression

Anxiety

Self-esteem

Nutrition

Fitness

Illness

Allergies

Number of students  
Student/teacher ratio  
Number of grade levels  
Operating budget

Formal  
Informal  
In-person/distance  
Intensity  
Length

401(k)  
Pension  
Savings account  
Savings bonds

Centre for Epidemiologic Studies  
Depression Scale  
Similar scales

Cardiovascular  
Strength  
Endurance  
Flexibility  
Body mass

# Good Questions

- Do not imply an answer
- Ask only one thing
- Do not have overlap in the answer options
- Let people say “I don’t know”
- Elicit variation
- Are really simple to understand & give clear instructions
- Use appropriate terminology
- Are ordered logically – or completely at random

# Things To Avoid

- Do not use double negatives
- Do not require complex thought
- Do not require recall of trivial details or something from the distant past
- Do not relate to several separate events
- Try not to cause embarrassment or annoyance
- Do not include a question unless you have a plan to use it

# Pilot Studies

- Very useful, but time consuming
- Test the questions for reliability
- Ask pilot-responders:
  - About phrasing
  - Confusion
  - Do they understand the question as you intend
  - Do you understand their answer as they intend
- How long does it take to complete

# Contact Potential Respondents

- Response rates are low
- Multiple follow-ups will be necessary
- Maintain professionalism
- Avoid the spam trap – no capitals or symbols
- Personalise where possible
- Highlight sponsorship if you have it
- Offer a way to unsubscribe
- Assure confidentiality & anonymity but only if you can



# Messages

- Invitation: introduce the survey, how this respondent was chosen, why their response is important, how to take the survey
- Gentle reminder: thank those who have taken part, briefly mention the survey, highlight the time to complete
- Reminder 2: thank you again & stronger reminder, briefly mention the survey & highlight why their response is important
- Final reminder: friendly tone, focus on it being the end

# How Long Does it Take

- Longer than you expect, surveys are NOT quick
- Research question > measureable constructs > questions > sample building > data collection > data cleanup
- Get the survey right before launching, any change invalidates ALL responses already collected
- Give as long as you can for data collection
- The couple of months you have is the bare minimum to fit it all in, there is no time to waste

qualtrics 

# Projects Screen

- Lists all surveys or the current folder
- Active surveys are highlighted
- Shows total completed responses
- Shortcuts to each area for each survey on the menu arrow
- The view can be changed & re-sorted

# Create a Survey

- Click the 'create project' button
- Click the 'blank survey project' button
- Give it a name & click 'create project'
- You're now given the survey builder with a blank multi-choice question



# Survey Structure

- Questions are grouped by blocks
- Blocks always start on a new page
- You can also create page breaks
- Only use blocks to group questions that need new pages or when using logic
- Start with what you need, end with what is less important
- No right answer about the number of questions per page

# Creating Questions

- Start with the introduction
- Click the question text to edit & 'rich content editor'
- Write the introduction & make any formatting changes
- Click off the editor to save the text
- Untick the question to force it to save
- **Do not copy text from Word, there will be formatting issues**
- Always explain how to answer questions

# Multi-Choice Questions

- For both single & multiple answer questions
- All settings can be changed
- Where possible, use 'automatic choices'
- Change the number of choices to suit
- Multiple answer questions
- Click 'edit multiple' to type options in
- Control answer positions & columns
- Click on the answer arrow for more options

# Matrix Questions

- Suitable for Likert-type questions
- Where possible, use 'automatic scale points'
- Remember, you can always condense scale points later
- Mobile compatibility can be an issue with these questions
- You can make columns wider/narrower

# Library Questions

- Good for demographics & regions
- Saves time writing/editing yourself
- Can still be edited
- Click 'import questions from' then 'Qualtrics library' then 'survey library'
- Some might not be suitable for the target region
- The options change regularly, not always for the best, but some move to 'automatic choices' instead



# Text Entry Questions

- Use for open questions
- Remember, you will need to analyse the responses
- The size of the text box implies the length of response
- If needed, use validation:  
email, telephone, date, numbers only
- Validation cannot be tested in question preview,  
only survey preview

# Question Options

- Change question & answer types
- Set option positions, label positions or columns
- Avoid forcing responses
- Add page breaks
- Add logic
- Move questions
- Use the **green +s** to add questions above or below
- Use the **red -** to move a question to trash

# Preview Survey

- Click 'preview survey' at the top
- Defaults to SoM template
- Shows desktop & mobile versions in most browsers
- Matrix questions should be displayed one item at a time on mobile devices
- If you complete a preview, it will save the results
- Share the preview URL to let others test the survey

# Image Questions

- To display an image
- Can use for a header image if you choose a different template or for sponsorship (though there are other ways)
- Use 'graphic with text' if you want to give instructions as well as an image
- Images are saved in your library
- Image questions with no answer options will not appear in the dataset – put in a dummy question

# Survey Flow

- For more advanced options
- Random block orders
- Different questions for different respondents
- Good to name blocks for this
- Click 'add below' then, for you, use 'branch' or 'randomiser'
- Drag blocks into randomiser then set options
- Also use this to only show a block after certain answers



# Logic

- Only show questions under certain circumstances
- Questions with display logic must be on a different page to the question they are based on
- Click the cog by the question then 'add display logic'
- Select the question, answer & condition
- You can have multiple conditions
- Skip logic can jump to the end of the block, or survey, or a question in the same block

# Survey Options

- Back button
- Allow people to save for later
- Show question numbers or not
- Change the survey title & meta description
- Set access, make it as easy as possible
- Set the end of survey & inactive survey messages, usually just leave as the default
- Set the partial completion timeout

# Look & Feel

- The SoM theme has limited options, but you can do more by going 'back to old editor'
- Change forward & back button text
- Add a progress bar, or not
- Change the theme if you want, which gives more options, but you will need to add something for branding
- Change question text – note this will override any formatting changes you set (without further work)

# Launch the Survey

- Test & proof your survey in preview thoroughly
- You should not make any changes once the survey is live
- Delete survey preview responses
- Click 'distributions' then 'get a single reusable link'
- Click, then copy the 'anonymous survey link'
- Never ask anyone to type it in, use a URL shortener
- Test the survey again yourself

# Email the Survey

- Ideal if you have a list of potential respondents
- Allows you to track survey progress
- Is NOT anonymous
- Keep track of messages sent – send reminders & thank you messages to the right people – automatically remove people who unsubscribe
- Start with contacts & the message library



# Contacts

- If you 'don't have permission', check the library (top left)
- Lists of potential respondents
- Include information to personalise messages
- Go to 'contacts' then 'create contact list' then 'import from file' & download the sample
- Delete row 2
- Enter names & email addresses plus any extra data
- Save & upload

# Message Library

- Create pre-written messages: Invitation, reminder, etc
- Questions, blocks & images are also in the library
- Start by copying the default text from a blank email
- Click 'library' then 'message library' then 'new message'
- Set the category & give it a name in the 'description' box
- Type your message
- The clipboard icon creates a survey link
- Click '{a}' to add text from contact lists, like a name

# Send Some Emails

- From a project screen
- Click 'distributions' then 'emails'
- Select your contact list in the 'to' field
- Set the 'when to send' time
- Add the subject
- Click 'load a saved message', select one from your library
- Click 'send'

# Email History & Follow-Up

- See how many emails sent & failed
- Remove any failed contacts from the panel
- See how many people start & finish the survey
- Click the arrow menu then 'schedule reminder' or 'schedule thank you'
- Set the message type & send time
- Load your message from the library & send

# View Results As You Go

- Click 'data & analysis' then 'data'
- There's now a delay on seeing results
- You will want to customise the page
- Click 'tools' then 'choose columns'
- Select any questions you want to see, use 'survey metadata' for start/end times, etc
- Click any row to see the response



# Close the Survey

- Click 'distributions' then 'pause response collection'
- Any partially completed surveys will now be included in the results – you decide what to do with them
- Anyone trying to take the survey will see the 'survey closed' message
- You can launch the survey again to collect more data


# Download Data

- Click 'data & analysis' then 'export & import' then 'export data'
- Click 'download data table'
- Click on SPSS for SPSS
- Click on CSV for anything other than SPSS
- If you 'use numeric values' you'll need to work out the codes, if you 'use choice text' you'll need to code everything

# Review the Data

- The CSV is needed for anything other than SPSS
- To import into a program, you will need to delete row 2 (with question text) (& row 3 in some modes)
- You will need a codebook to understand the numbers
- Ignore the location information, it's very inaccurate
- Text & image questions (with no answer option) will not appear in the dataset – you need a full question in each block if you use randomisation & want to know what people saw

# Review the Data in SPSS

- Question numbers are variable names
- Question & answer text are the labels
- Values are pre-coded
- It is best to check the coding & measure type
- In data view, click the  button to toggle showing coded values or text

# A Little More Qualtrics

- Avoid multiple languages
- Copy an entire survey for backup or major revisions
- To share a survey click 'share project' then enter the name or email address of the person to share with – set what they are allowed to do & click save
- Backup a survey by exporting, import by creating a new survey from a file
- Export as Word is most useful as a codebook



# Questions

# Time to Experiment

- Create a multi-choice question using automatic answers
- Add a text box to one answer
- Use display logic to only show a question when a certain answer has been made to an earlier question
- Test this to make sure you've used the right 'and/or' option
- Look at the question types not covered, can you imagine a use for them
- Launch your test survey & take it to see what respondents see

# Before You Go

- Fill in your feedback sheets  
(we really do change things based on feedback)
- Sign the register