

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 credentials
- Follow the instructions on setting up a **new account**
- The self-enrolment code is: **in the wiki**
- Use your university email address for Qualtrics
- Check your spam folder for the verification email
- If you can't log in, follow the 'forgotten password' routine

Session Outline

Surveys:

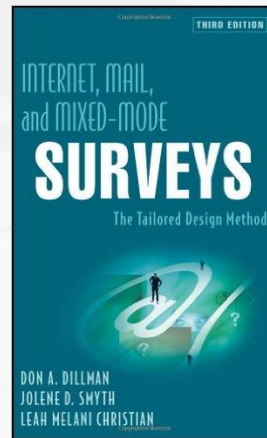
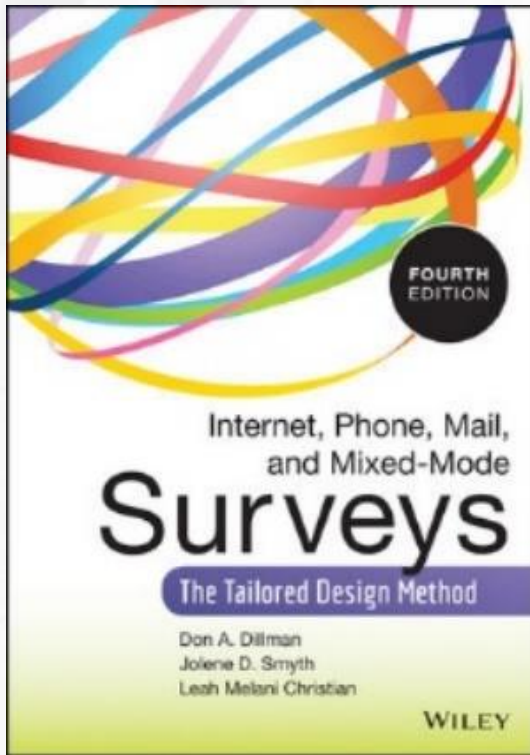
- When to use surveys
- How to set up surveys
- How to write suitable questions

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 'create your own' button then 'survey'
- Give it a name & click 'get started'
- 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
- You can make columns wider/narrower, though this will probably look different on mobile devices

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 content 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
- Test thoroughly and on different devices

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 can be on the same page as the question they are based on (they'll pop into existence)
- 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 formatting – 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 'web' & 'use anonymous 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
- 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
- '{a}' also gives you other 'piped text' & the 'opt-out' link

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 often 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 'collaborate' 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

Before You Go

- Fill in the feedback form
(we really do change things based on feedback)
- Make sure your attendance is noted