

# Introduction to Survey Research and Qualtrics

MSc Research Skills

## New Format

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Normally, this would be a two-hour workshop involving a small amount of lecture material on survey research and a practical session on Qualtrics, where we would, as a class, develop and launch a test survey. Given the need to work remotely, things have obviously changed and having experimented with different options, we think the best solution is this document, which includes everything from the workshop, but expanded with the explanations and screenshots that you would have had in the live session.

You can essentially use this as a manual for the Qualtrics functions you are likely to use (hence the index on the next page) and email any further queries to me on [m.betton@bath.ac.uk](mailto:m.betton@bath.ac.uk).

# Outline

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## Surveys:

- When to use surveys
- How to set them up
- 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

But remember that this only covers what you are likely to need to know, as there is a lot more to surveys and Qualtrics.

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# Survey Research

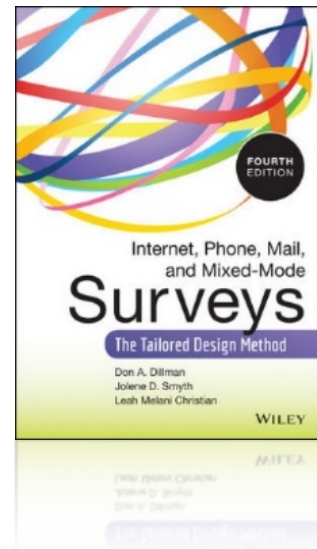
## Textbook

If you are textbook inclined: “**Internet, Phone, Mail and Mixed-Mode Surveys: The Tailored Design Method**” (ISBN 978-1-118-45614-9) is particularly useful.

**You do not need to adhere to the Tailored Design Method.**

But the book gives excellent advice on who to approach, how to approach them, and how to write questions. It expands on much of what is covered here.

The third edition is much older, but cheaper, and much of the information on how to write questions is still relevant.



## Why Surveys

**You can collect data on knowledge, opinion, behaviour & attributes.**

**They can be used for descriptive, explanatory or exploratory research** – i.e. you can test a specific hypothesis, or you can see what is happening and try to explain why.

**They can be cross-sectional** (one group of people at one point in time) **or longitudinal** (the same group of people, many times). Your work will likely to cross-sectional.

**There is always a person at the end, answering questions**, even if your questions are related to businesses.

**You get the same information from everyone** because everyone is given the same questions.

## Sampling

**Whom are you going to survey?** Can it be the general public, or managers at a certain level within a business, etc.?

**Does the survey need to be representative of a wider population?** In which case, you need to consider how to identify your population and develop a representative sample of it. Perhaps an availability sample will suffice (i.e. you sample whoever you can), though this will limit the scope of your results.

**Is there a list you can use?** If you want to contact people directly, can you find and use a directory (such as businesses in a particular region or industry)? Such a list would allow you to create a sample, or just give you many names to ask for responses.

**How will you get access?** Consider if you can get the contact information you need. Also consider if there are gatekeepers that you need to get through – such as secretaries who intercept all messages for high level managers.

**Is there anything specific about your sample that you will need to accommodate?** Normally, this would be limited to choosing your language carefully – are there certain terms to use or avoid (you do not want surveys to be too specialised). You should also consider if there are times of the year that should be avoided because the people or firms you want to sample will be too busy to respond.

*Given the current situation, you also need to consider the effects of COVID-19. Will firms still be open, or will there be sufficient staff to answer your questions (from home)? By the same token, consider that an online survey is largely unaffected by what is going on, while other methods of data collection (such as interviews) are much more difficult to administer.*

**Can the people in your sample answer the questions you need to ask?** Consider if the people in your sample have the knowledge that you need or if you should suggest they seek assistance. Furthermore, consider if they have the authority to answer and share the information you want. Also, are there financial or cultural issues that must be accommodated?

## Measurement

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Before you write any question, you need to consider:

**What information you need to capture.** This partly relates to the type of research: if you have a hypothesis, this will inform the variables you need; but if you have exploratory research, you may need wider variables to see ‘what sticks’.

**How can this be measured quantitatively?** Even if you give respondents an open question, this will need to be quantitatively analysed.

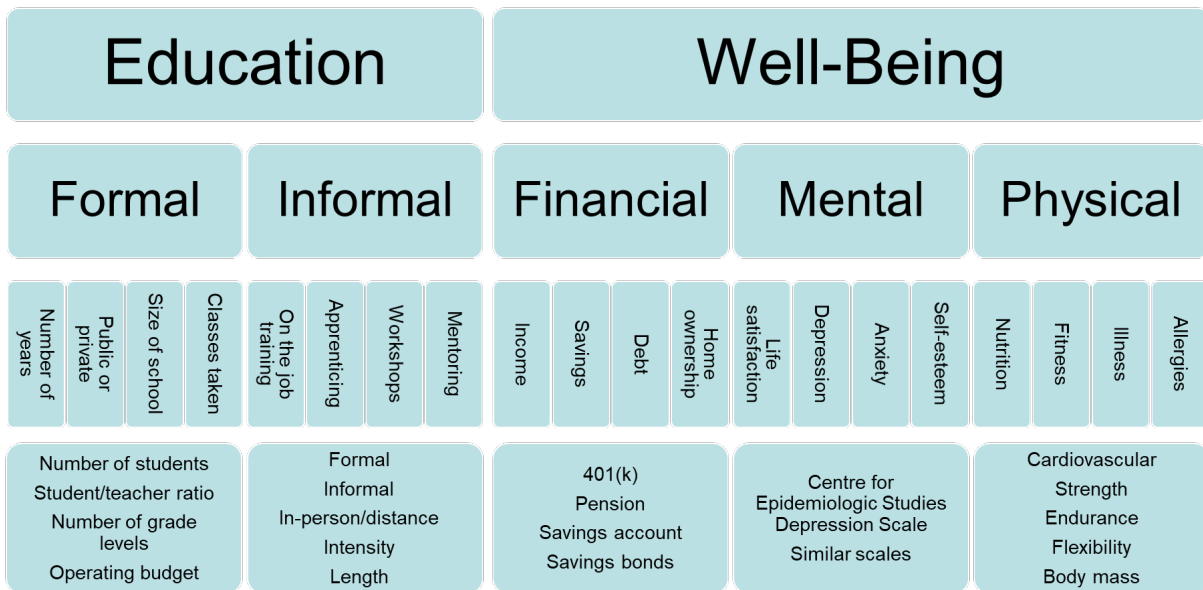
**How will you ask each question?** Once you know what information you need and how to measure it quantitatively, you need to phrase the question in such a way that no-one can misunderstand it.

**What analyses do you want to run?** You should plan your analysis before writing questions. If you want to run a linear regression (for example), you need to collect data in such a way that you have suitable variables in a suitable format.

## Example

Given a research question of “*how does education affect well-being*”, you need to consider the research domains, measurable constructs, and how to actually measure the answers.

You can see below that education can be considered as formal or informal. Formal might be easier to measure through qualifications and grades (though not everything has a qualification – whether you use this resource or attended a workshop, you do not get a ‘grade’ or certificate of your Qualtrics education). Informal education is more difficult to measure and you need to consider if you think it is an important distinction for your work.



When it comes to well-being, there are again a number of ways to look at the concept and how you choose to do that will lead to how you can measure it. One important thing to consider is that existing scales can be very useful. If you can find a scale or measure which already exists and which has been approved through its use and peer review, it is likely better for you to use it (and cite it away) than to develop your own.

## Good Questions

**Do not imply an answer** – questions should be neutral, even down to “how much do you agree or disagree with...”, rather than just “how much do you agree with” (which implies the respondent should agree). For the same reason, scales should be equal, not “great, very good, good, poor” (giving more weight to the ‘good’ options).

**Ask only one thing** – there should be no *and’s* or *or’s* in a question, as respondents may only be able to answer part of the question and it will not be clear to you what they mean.

**Do not have overlap in the answer options** – for the same reason. This means a scale about money needs to be detailed: “£0.00 to £99.99, £100.00 to...”. If you say 0-100 and 100+ then

people who want to say 100 can choose either. If you say 0-99 and 100+ then people who want to say 99.50 have no valid option.

**Let people say “I don’t know”** – you should not force an answer as it can bias your results and there is a risk that respondents will just select something at random in order to progress, which could affect your results. Respondents may also just quit the survey.

**Elicit variation** – you want respondents to give you lots of a different answers, if everyone says the same thing then there will be nothing to analyse.

**Are really simple to understand and give clear instructions** – pretend that everyone who takes your survey is stupid, so you have to give very clear instructions. Make sure your questions only relate to one thing/situation/instance.

**Use appropriate terminology** – use complete sentences for your questions and tailor them to your audience. Unless your sample consists of a very specific population with specific terms/acronyms, then assume you need to spell everything out.

**Are ordered logically, or completely at random** – there is no “right way” to order questions. You may want to logically flow from one theme to the next (or your questions may build up to something that way), or you might want to keep people guessing, so they do not try to anticipate the answers you want (which would bias your results).

One very important point is to **collect the crucial information first**. No matter what you do, there is always the risk that people will quit your survey before reaching the end. If they have answered the crucial questions, then you can likely use their response. If they have only entered a few demographic details that you can live without, the response is all but useless.

## Things to Avoid

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**Do not use double negatives** – this goes back to keeping things simple.

**Do not require complex thought** – so does this.

**Do not require recall of trivial details or something from the distant past** – such questions slow respondents down and there is a greater risk that details will be misremembered.

**Do not relate to several separate events** – this relates to asking singular questions, rather than risking answers being about one/some but not all events of a type.

**Try not to cause embarrassment or annoyance** – remember that people taking surveys become stupid and look for ways to be annoyed or embarrassed. Even a scale on education going from GCSE (or equivalent) through to PhD, risks making respondents who only have the lowest levels feel inferior, which may affect their responses for later questions.

**Do not include a question unless you have a plan to use it** – you want to keep your survey as short as possible and make your analysis as easy as possible, so if you have no plan for a question, it should not be included.

## Pilot Studies

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These are **very useful, but time consuming**. You may well not have the time and you also want to make sure you do not use up your sample with just pilot responses.

They let you **test the questions for reliability** – which is particularly useful if you have developed your own scales.

It is more than just the survey, you can **ask pilot-responders**:

- **About question phrasing**
- **Confusion**
- **Check that they understand the question as you intended**
- **Check that you understand their answer as they intended**

With this, you can make changes to your main survey, before it goes live.

You can also get an idea of **how long it takes to complete**, which you can then highlight to respondents of your main survey.

## Contact Potential Respondents

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**Response rates are low**. The current situation will either mean that people have more time take a survey (and break up boredom), or they may be too focused on other matters – particularly if your sample is business related.

**Multiple follow-ups will be necessary** – you will need to chase people to get them to respond.

**Maintain professionalism** – which becomes increasingly difficult as you beg for their response.

**Avoid the spam trap – no capitals or symbols**. Remember that a message from a stranger saying “click this link and tell me your secrets” could not look more like spam if it tried. Going back to the last point, you need to be professional.

**Personalise where possible** – if you have the name of the respondent, or the business, then include it. You can also say where you found their information.

**Highlight sponsorship if you have it** – you can say you are from the university, which gives your message and survey a level of respectability. If you have any business sponsorship, this may help as well.

**Offer a way to unsubscribe** – you need to let people get off your mailing list. If you send messages through Qualtrics (which you should), then you will have to offer an unsubscribe link, though Qualtrics will handle it for you.

**Assure confidentiality & anonymity but only if you can**. Confidentiality means you will not share your results, while anonymity means you will make it impossible for someone to link a



response to a respondent. One or both can help get responses, but you need to actually do the work.

## Messages

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You want to vary your messages and send them at different times throughout your data collection period. You do not necessarily need to contact everyone at once, though you may not have the time to spread messages out far.

Begin with an **invitation**: in which you introduce the survey, say how this respondent was chosen and why their response is important. Then explain how to take the survey (i.e. click the link and follow the instructions).

Then a **gentle reminder**: in which you thank those who have taken part, briefly mention the survey and highlight the time it is taking to complete (hopefully not long).

Later, you can send **reminder 2**: in which you say thank you again and give a stronger reminder. You should briefly mention the survey and again highlight why their response is important. This is where the begging really starts to kick in.

Lastly, a **final reminder**: in which you should use a friendly tone and focus on it being the end of your data collection. Remember that after you send a message which claims to be the “final chance”, you cannot send another.

While you could continue to contact potential respondents, there is plenty of evidence to suggest that after four messages, any return will be very marginal.

## How Long Does it Take

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**Longer than you expect, surveys are NOT quick** – people like to think they are because there is no hour-long interview and three-hour transcription, all before analysis can begin.

But consider what you have to do and consider: **research question > measureable constructs > questions > sample building > data collection > data cleanup**.

You also have to **get the survey right before launching, as any change invalidates ALL responses already collected**, so you cannot change anything after launching. You also cannot ask respondents to take the survey again because you have made a few little tweaks or added a question.

**Give as long as you can for data collection** – this is the most difficult part and it is impossible to know how people will react during the current situation.

**The couple of months you have is the bare minimum to fit it all in, there is no time to waste.**

# Qualtrics

Qualtrics is a particularly powerful and professional tool for online surveys and while there are other options (like SurveyMonkey), the university pays a lot of money for the licence and you get most of the features.

It is widely used, so you can usually Google any questions you have and the official manual is very useful. But Qualtrics changes often, so you have to watch out for buttons moving or changing name all the time. Sometimes these changes make things better, but sometimes features are removed or simply become less useful.

Note that many of the questions have been simplified in the screenshots used in this document.

## Sign Up for Qualtrics

First, follow this link: <https://wiki.bath.ac.uk/pages/viewpage.action?title=Qualtrics+-+School+of+Management+Accounts&spaceKey=QRU> to the School of Management Wiki.

It is best to sign up early, as problems can take a while to fix. There are details of who to contact in the Wiki.

You need to log in with your Bath username (without the @bath.ac.uk) and password, then follow the link shown below:

### Qualtrics - School of Management Accounts

Created by David Todd, last modified by Judith Bishop on Sep 28, 2018



This space is for School of Management staff and students, and provides details of how to: register for a Qualtrics account, switch from a non-School account to a School account, upgrade from a trial account.

There are also some materials to help get you started with Qualtrics.

Settings up Accounts, switching accounts, upgrading accounts;

Getting started in Qualtrics

The following link provides an excellent guide to getting started in Qualtrics

#### Setting up a Qualtrics account for the first time

- Go to the [School of Management's Qualtrics portal](#)
- Click on the link 'Please click here to create an account'.
- You will be asked for a self-enrollment access code, you need to use [this link](#).
- You will then be sent a verification email. Once this email is activated you will have access to a School of Management Qualtrics Account.

[https://www.qualtrics.com/Qualtrics-accounts/setting-up-a-new-qualtrics-account.aspx](#)

It may not look it, but you are now on a Qualtrics page. Here, **you need to select “Don’t have an account”**, then enter your Bath email address (with the @bath.ac.uk) and the **access code**, which is in the wiki, a little below the link you clicked.

Check your inbox for a **confirmation email** and follow the link to set up your account with whatever password you wish to use. You may need to check your spam folder for the message.

Now **log into Qualtrics**. If you get an error at this point, select “forgot your password”, go through that process and try to log in again.

From now on, you can just login from [qualtrics.com](https://qualtrics.com).

## Projects Screen

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This is the first thing you see when you log in. It will be empty at first and will gradually fill as you create projects. Each project includes a survey, distribution, and data.

The screen lists all projects or the current folder.

Projects with active surveys are highlighted.

The screen also shows the total number of completed responses.

You can either click on a survey to open it or use the menu button at the end of each line for shortcuts to a specific part of the project.

The view can be changed and re-sorted.

## Create a Survey

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Click the “create new project” button.

Under “create your own”, select “survey”.

Give it a name & click “get started”.

You will now be presented with the survey builder and a blank multi-choice question. You can delete this question using the red minus button.

## Survey Structure

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Questions are grouped by blocks and blocks always start on a new page, but you can also create page breaks.

Only use blocks to group questions that need new pages or when using logic.

You can also name blocks by clicking on their name and changing it – at the moment you will have a “default question block”. This is something we will change later.

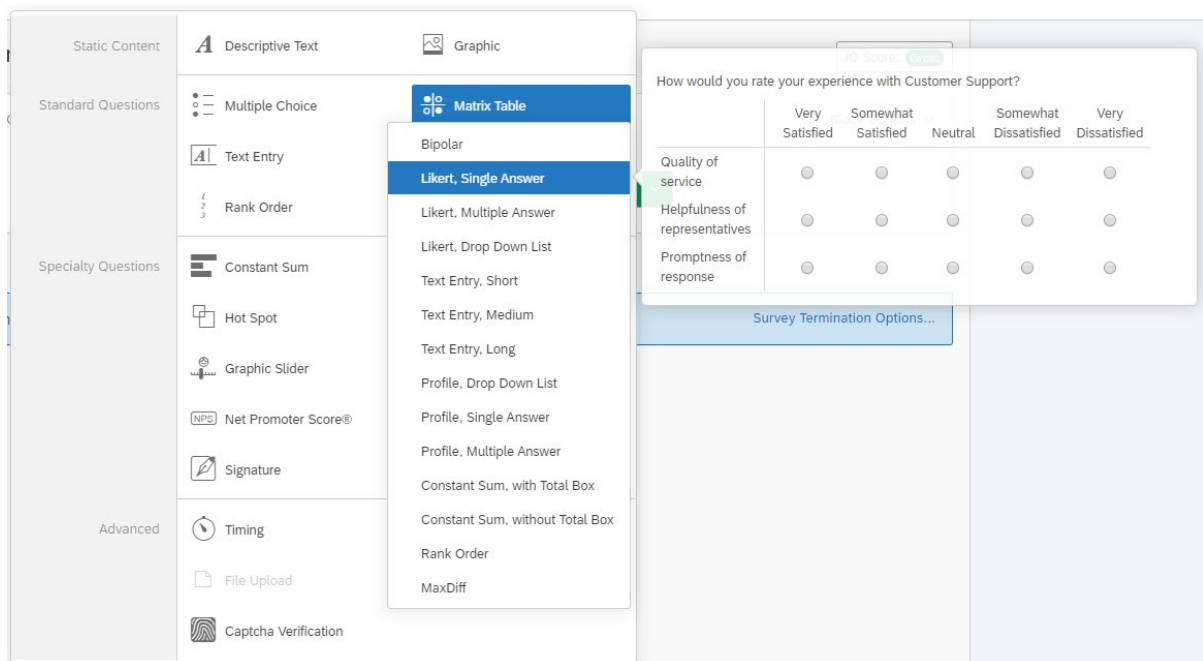
As suggested earlier, after an introduction, start with what you need, end with what is less important.

There is no right answer about the number of questions per page.

## Creating Questions

The easiest way is to hit the down arrow next to the “create a new question” button. This presents a list of all the question types and a preview for each when you run your mouse over it. Hit the down arrow next to each question type to see the different ways that question can be shown. You do not need to make the right selection now, as you can change the question type later on.

In the screenshot below, you can see a preview of a “likert single answer” question, under the “matrix table” question type.



With all questions, click where it says “click to write the question text” to write out your question stem. You can then select the “rich content editor” to give you basic formatting options.

When you have finished, click somewhere outside the editor to save the text.

You can then untick the question to force it to save (you will briefly see a notification of this at the top left).

The first time you introduce a new type of question, you need to explain how to answer it, i.e. “tick one option” or “tick all that apply”, etc.

Do not copy text from Word, as there will be formatting issues. They may not be obvious at first, but when text does not line up later, that will be the issue and it can be difficult to fix.

When you want to write answer options, whether it is for a scale or list of items, the easiest way is to click “edit multiple” at the top of the right menu and type out one option per line.

## Text Only Questions

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Use a “descriptive text” question when you just want to write something and have no answer component. This could be for an introduction or a final message at the end of the survey.

Indeed, your first ‘question’ should be an introduction to the survey. This needs to say:

- Who you are,
- What the survey is about (without giving any bias),
- How to quit (close the browser),
- How the survey is optional and taking it means granting consent, and
- It should include your university contact information.

# Multi-Choice Questions

This is a session about surveys (tick one)

- Strongly agree
- Agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Disagree
- Strongly disagree

This session covers (tick all that apply)

- Survey basics
- How to create questions
- How to register
- Other

Use these for both single and multiple answer questions.

Once you create the question, all settings can be changed using the menu on the right.

Start by writing the question stem. If you are using a scale, make sure to give both extremes in the question, i.e. “how much do you agree or disagree with...”.

Where possible, use “automatic choices” on the right menu, which includes a board number of scales and saves a lot of time.

Once you choose a scale, you can try the plus and minus buttons to change the number of scale points. For example, if you select “disagree-agree” you will get a seven-point scale, but you can change this to a five-point scale if you prefer.

If you want a multiple answer question (i.e. “tick all that apply”) then instead of automatic choices, hit “edit multiple” on the right menu and enter one choice per line.

The right menu also lets you control answer positions and columns, etc.

You can also click on the down arrow at the end of each answer for more options.

The most important of these is at the top of the list for “allow text entry” which will provide a text box. You might want to use this for an “other” option and asking respondents to type what they mean by ‘other’.

You may also want to consider presenting your answer options in a random order, particularly if you think there is a risk that respondents could be biased by the order of the options. To do

Change Question Type

Multiple Choice

Choices

7 Edit Multiple

Automatic Choices

Disagree – Agree

Answers

Single Answer

Multiple Answer

More...

Position

Vertical

Horizontal

More...

Validation Options

Force Response

Validation Type

None

Custom Validation

this, simply click the cog on the left of the question, hit “randomisation” and select “randomise the order of all choices”. Obviously, do not do this for scale questions, it will only confuse people.

## Matrix Questions

How much do you agree or disagree with each of the following statements (tick one per line)

|             | Strongly agree        | Agree                 | Somewhat agree        | Neither agree nor disagree | Somewhat disagree     | Disagree              | Strongly disagree     |
|-------------|-----------------------|-----------------------|-----------------------|----------------------------|-----------------------|-----------------------|-----------------------|
| I like cats | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I like dogs | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |


These are suitable for Likert-type questions where you want to ask about several items in quick succession.

Where possible, use “automatic scale points” again. Remember, you can always condense a large scale into something smaller if needed later, during your analysis.

Use the “edit multiple” button under ‘statements’ in the right menu to enter each of your statements.

You can make columns wider/narrower, though this will probably look different on mobile devices. Make sure the “mobile friendly” option is ticked on the right menu.

**Change Question Type**

 **Matrix Table** ▼

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**Statements**

– 2 + [Edit Multiple](#)

Automatic Statements

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**Scale Points**

– 7 + [Edit Multiple](#)

Automatic Scale Points

Disagree – Agree ▼

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**Labels**

– 0 +

---

**Matrix Type**

Likert

Bipolar

[More...](#)

---

**Answers**

Single Answer

Multiple Answer

Drop-down List

Drag and Drop

---

**Options**

Mobile Friendly

Transpose Table

Position Text Above

Repeat Headers

Add White Space

---

**Validation Options**

Force Response ▼

---

**Validation Type**

None

Custom Validation

# Text Entry Questions

Enter your email address to enter the prize draw.

Use these for collecting information like names and email addresses (if you do not already have them) or to ask open questions.

Remember, you will likely need to analyse the responses.

The size of the text box implies the length of response. When choosing the question type you will likely want “single line” for something short like an email address, or “multiline” if you want a longer response. You can also resize the text box as required.

You may want to consider “content validation” in the right menu. This will check to make sure what is entered matches what you want to collect. In the example above, we would set this as “email”, which only checks to make sure the entry is “something @ something . something”, it is not very sophisticated.

When you set content validation you must tell respondents what they should enter, particularly if it something like a date, where you may want dd/mm/yy. Do not make people get it wrong just to find out what to do as this will annoy respondents. Once you have validation set, there will be a ‘star’ icon on the left of the question to remind you (which will not appear to respondents).

Validation can only be tested when previewing the survey (not the question).


## Change Question Type

 Text Entry 

### Text Type

- Single Line
- Multi Line
- Essay Text Box
- Form
- Password




### Validation Options

- Force Response 

### Validation Type

- None
- Minimum Length
- Maximum Length
- Character Range
- Content Validation
- Custom Validation

### Content Type

- Email Address
- US Phone Number 
- US State
- US Postal Code 
- Date (mm/dd/yyyy) 
- Number
- Text Only (Non-numeric)



## Image Questions

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Use these to display an image.

Use “graphic with text”, which will let you type out a question and present an image to respondents.

Once you write your question stem, click to select an image from your library. Then hit “upload a new graphic” to add to your library. Images will stay in your library for later use.

You might want to use this to present different images to different respondents and then ask questions about what people saw – which is particularly popular for those in marketing. Refer to the section on Survey Flow for more information on this.

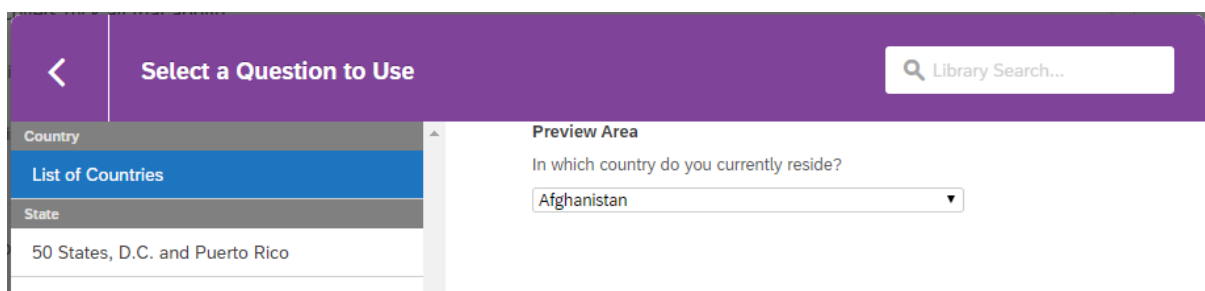
## Library Questions

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Not all questions have to be entered from scratch. Qualtrics has a library which you can borrow from at any time. However, the contents and options frequently change. Sometimes library questions are moved to the “automatic choices” menu for built-in scales, particularly near the end of the list.

Alternatively, instead of hitting “create a new question”, hit the “import questions from” button next to it. Then select the “Qualtrics library” and “survey library”.

Some of the options are very American-centric, but under the “demographics” menu and “country & US state” is a “list of countries”. This list is likely much more comprehensive than any you will want to enter yourself.



Once you import the question, you can change the question stem to something more suitable, for example “where do you live” or “where were you born”, etc.

You may notice a symbol on this question “X→”. This only means that the options are not coded in order, but you do not need to worry about this.

Once imported, you can also change the answer options if you want to add or remove specific items, along with altering the order.

You can also use this menu to borrow questions from your own surveys, once you build up your own collection.

## Question Options

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Select any question, then using the right menu, you can change question and answer types at any time.

The options below will change depending on the question type, but generally you can set answer option positions, label positions or layouts, etc.

Under “validation options” are settings for “force response” and “request response”. ‘Force’ will not let a respondent progress until they answer the question, ‘request’ will ask respondents to answer the first time they skip a question, then let them skip the second time. **Both options should be avoided.** While it is tempting to set this on every question, it will likely only annoy respondents, who will either enter any answer just to progress (biasing results) or they may just quit.

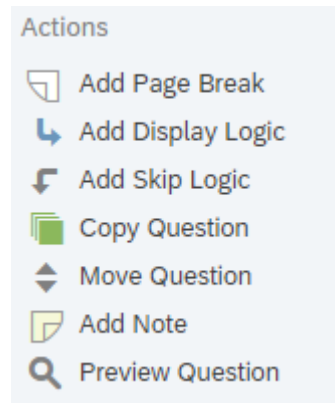
You can add page breaks or logic (which is covered later).

You can also copy a question to save time if you have multiple similar questions.

You can tick questions then move them throughout the survey.

Use the green ‘plus’ icons to add questions above or below the current question.

Use the red ‘minus’ icon to move a question to trash.



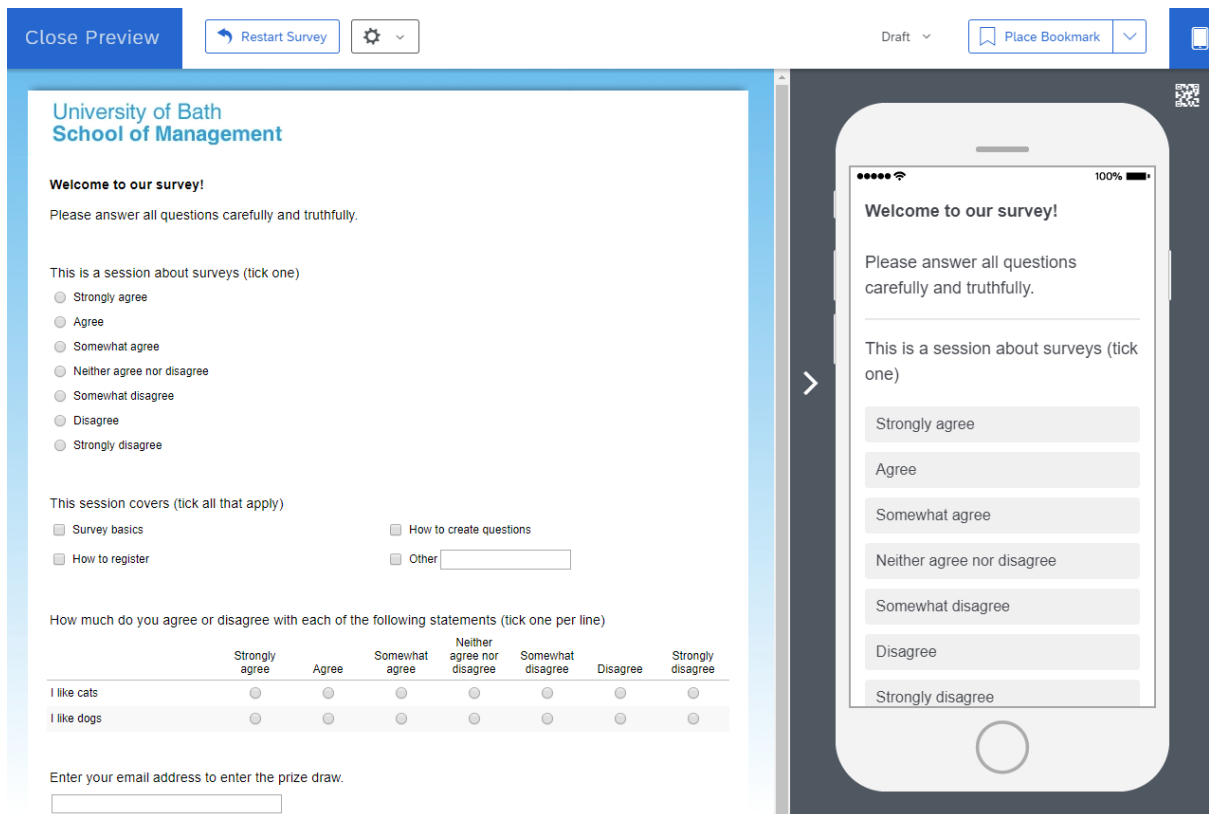
# Preview Survey

You can click 'preview' at the top of the screen at any time to see what the survey looks like on both a desktop and mobile browser. On desktop it will default to the School of Management template (though you can change this), but mobile generally ignores this.

You need to thoroughly preview your survey to make sure everything works and that you understand how it looks to respondents. For example, matrix questions look like a table on desktop, but should be displayed one item at a time on mobile devices.

If you complete a preview response, it will save the results as a 'preview'. This way you can look at how the data appears, but filter or remove it from your main responses.

You can copy the URL from the preview window and share this with others to get them to test the survey as well.



# Logic

This lets you only show questions under certain circumstances.

Questions with display logic can be on the same page as the question they are based on (they will pop into existence) if you tick the “in page” box.

Click the cog by the question you want to add logic to, then hit “add display logic”.

Select the question you want to base the logic on and set the answer conditions. You can set multiple conditions.

In the screenshot below, the selected question should only appear if the respondent says they disagree or strongly disagree in an earlier question (Q3 in this case). Once you save, Qualtrics will highlight this on the survey page.

Display Logic (Now, this is a session about surveys)

Display this Question only if the following condition is met:

Question ▾ Q3 This is a sess...urveys (tick one) ▾ Disagree ▾ Is Selected ▾ - +

Or ▾ Question ▾ Q3 This is a sess...urveys (tick one) ▾ Strongly disagree ▾ Is Selected ▾ - +

In Page Close ✓ Save

This works on a per-question basis, but you can do the same for a block of questions (which is explained in the section on Survey Flow).

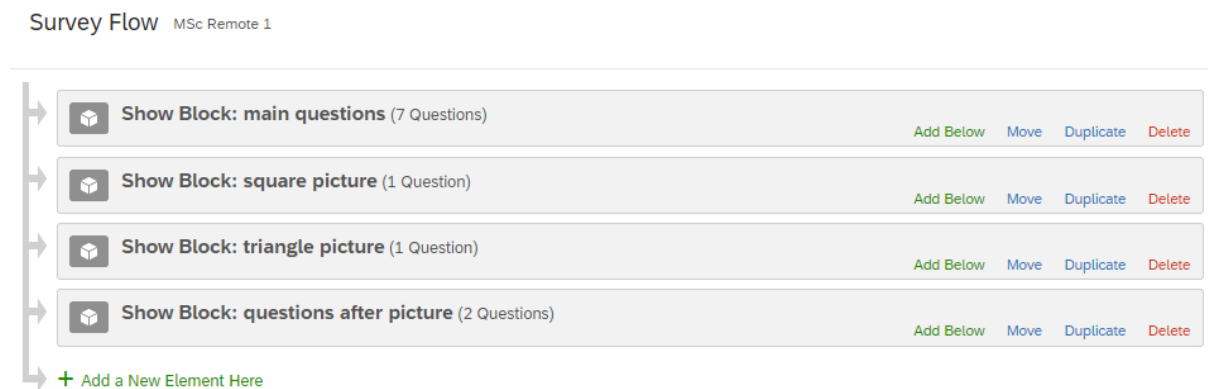
Skip logic works in a similar way and can jump to a question in the same block, the end of the block, or the end of the survey.

# Survey Flow

This is for more advanced options, such as random block orders and presenting different questions to different respondents.

This is why it is good practice to name blocks.

Simply select “survey flow” near the top of the screen.



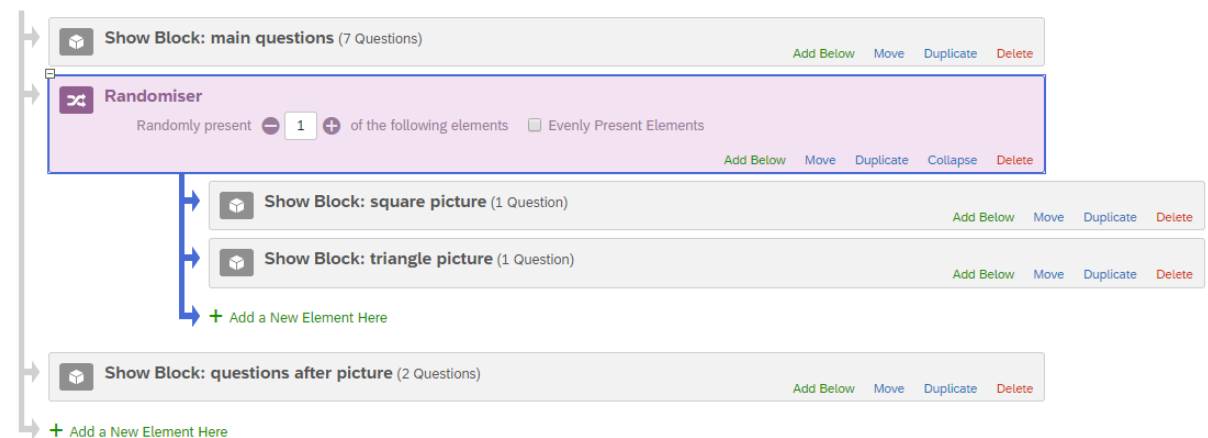
In the above screenshot, the survey has four blocks. A set of questions in the first, a single picture in the second and third, then a set of questions at the end.

## Random Questions

Let's say we want to present the first block, then randomly show either the square or triangle picture blocks, then show the final block. For those in marketing, this could be to show different adverts to different respondents, then ask them questions about it.

On the first block, click “add below” then “randomiser”.

Drag the blocks into randomiser then set how many you want to present. It should look like the screenshot below:



Now, all respondents will see the first block, they will randomly see either the square or triangle picture blocks (but not both), then they will all see the final block.

### **Certain questions for certain people**

Instead of the randomiser, select “branch”.

You can set logic based on previous question answers, in exactly the same way as described in the section on logic.

Once the logic is set, drag in the required blocks.

This way, you could have a block of questions (for example) on employment, which only appear if a respondent says in an earlier question that they have a job.

Use blocks and survey flow logic when you have lots of questions that rely on the answer to an earlier question. When you only have one or two questions, use individual question logic, as described in the section on logic.

# Survey Options

## Survey Options

### Survey Experience



- Back Button.** Enable respondents to change their responses.
- Save and Continue.** Allow respondents to save and continue later.
- Show Question Numbers.** Great for previews. For participants, try a [Progress Bar](#) instead.
- Use Custom Survey Validation Messages...**

**Survey Language:**  The language the survey is written in.

**Survey Title:**  This text will appear in the browser as the window or tab title.

**Meta Description:**  Search engines and social media services use this description.

### Survey Protection



- Open Access.** Allow anyone to take this survey.
- By Invitation Only.** Prevent people from taking the survey using an anonymous survey link.
- Password Protection.** This password must be entered to take this survey:
- Prevent Ballot Box Stuffing.** Keep people from taking this survey more than once.
- HTTP Referrer Verification.** The user must come from this URL to take the survey:
- Prevent Indexing.** A tag will be added to the survey to prevent search engines from indexing it.
- Secure Participants' Files.** Files uploaded as responses can only be viewed by users with permission to view responses.
- Show a **custom message** when a respondent revisits a **previously completed** link..
- Survey Expiry.** The survey will only be available for a specified date range.

### Survey Termination



- Default** end of survey message.
- Custom** end of survey message...
- Show Response Summary.
- Redirect** to a full URL, for example: 'https://www.qualtrics.com':
- Send an additional thank you **email** from a library... When distributed via the Survey Mailer.
- Anonymise Response.** Do NOT record any personal information and remove contact association.

First, decide if you want respondents to be able to go back to previous pages and change their answers. If you do, tick the “back button” box. Consider that some respondents might try to guess what answers you want by the end of the survey and change their answers to match.

Allow people to “save and continue” – make it as easy as possible for respondents.

Decide if you want to show question numbers or not. These are the numbers next to the questions in the survey builder. Consider that they may not be in order and it may not make sense if you use logic or randomisation. Qualtrics thinks you should turn off question numbers and use a progress bar (which is detailed later).

Change the survey title to suit your survey and copy this into the meta description box.

You can likely leave the “survey protection” settings alone. You want to make it as easy for respondents as possible and there is nothing you are likely to be doing that warrants the protections.

Although you can change them, it is usually fine to leave the “survey termination” and “inactive survey” settings alone. You can see what the default messages are using the survey preview.

At the bottom, set the “partial completion” timeout for as long as possible – again to make it as easy for respondents as you can.

## Look and Feel

The screenshot displays the 'Look and Feel' configuration page in Qualtrics. The left sidebar contains navigation links: Theme (BATH1), Layout, General, Style, Motion, Logo, Background, Restore Defaults, and Need help?. The main area is titled 'Look and Feel' and shows the 'General' settings. These include: 'Next Button Text' (dropdown), 'Previous Button Text' (dropdown), 'Progress Bar' (set to 'None'), 'Questions Per Page' (input field), 'Header' (dropdown with 'edit' link), and 'Footer' (dropdown with 'edit' link'). A preview window on the right shows a survey titled 'University of Bath School of Management' with a welcome message and a Likert scale question. The bottom of the interface has a 'Back to Old Editor' link, a 'Cancel' button, and a green 'Save' button.

This is one of the most recent changes to Qualtrics. The School of Management theme has limited options here, but you can do more by going “back to old editor”. However, you should expect the ‘old editor’ is disappear without notice, so you should not rely on it.

Using the options in this menu, you can change forward and back button text.

Add a progress bar and set its position, which Qualtrics prefers to question numbers.

If you change the theme to one of the new ‘dynamic’ options, you will open up all of the new features. If you do this, you will need to add something for university branding. There are options here for a ‘logo’ and colour scheme, which you can set to look similar.

There is an option to “change question text” formatting, which you may want to use to make the question stems stand out – note this will override any formatting changes you set (without



further work). For example, in the screenshot above, the first question (the introduction) has one line bold and one normal – if you set all questions to be bold, both lines will become bold. You would then either have to find another way to make the first line stand out, or edit HTML to restore the formatting.

## Launch the Survey

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At this point, you should have set all of your questions, checked for spelling mistakes, and thoroughly tested the entire survey. Ideally, send the preview link to someone else to double check. If you have any logic, this needs to be checked extra carefully.

You should also download the preview data (described later) to check the responses are coming out as you expect. You can then delete the preview responses if you wish.

You should not make any changes to the survey at all once it is live.

Click “distributions” in the top menu, then “web” and “use anonymous link”

This will give you a very long and complicated URL for your, now live, survey.

Never ask anyone to type this address in, use a URL shortener service and distribute that address instead.

Any responses collected through this link will be completely anonymous, unless you have questions which ask people for their name.

## Email the Survey

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This is ideal if you have a list of potential respondents, as Qualtrics will do most of the work for you.

It is NOT anonymous and you will be able to track the progress of every individual.

This also lets you keep track of messages sent, send reminders and thank you messages to the right people, and it will automatically remove people who unsubscribe.

While there is an email button in the “distributions” menu, you actually want to start with contacts and the message library.

## Contacts

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In the top right menu, click “contacts”.

If you receive a message suggesting you “don’t have permission”, check that your name is in the top left corner, if not, click what is there and select your name.

You can upload lists of potential respondents, including information to personalise messages.

Hit “create contact list” then “import from file” & download the sample file.

| FirstName | LastName | PrimaryEmail       | ExternalDataReference | EmbeddedDataA | EmbeddedDataB |
|-----------|----------|--------------------|-----------------------|---------------|---------------|
| John      | Doe      | John_Doe@email.com |                       |               |               |
|           |          |                    |                       |               |               |
|           |          |                    |                       |               |               |

Enter names and email addresses. If you have an external database, the reference ID for each respondent should go in the “ExternalDataReference”. Any extra data, such as the name of the business or where you found people’s data, that should go in the “EmbeddedData” fields and you can add more of these.

Delete row 2 – the example “John Doe” line.

Save and upload this list to Qualtrics.

# Message Library

This allows you to create pre-written messages for invitations, reminders, etc.

Images and files are also stored in the library.

In the top right menu, click “library” then in the top left menu “messages library” then “new message”.



Set the category – first you will want an “invite email” - and give it a name in the “description” box.

Type your message. Refer back to the “contact potential respondents” section and the textbook about what to include here. In the screenshot below, a name field has been added, though the rest of the message is missing. There are also links to the survey and unsubscribe options.

A screenshot of the 'Edit Message' form. The form has a title 'Edit Message' and a 'Translate Message' link. It contains several fields: 'Message Type' (a dropdown menu with 'Invite Emails' selected), 'Destination Folder' (a dropdown menu with 'Uncategorised' selected), 'Description' (a text box with 'MSc test' entered), and 'Language' (a dropdown menu with 'English (US)' selected). Below these fields is a rich text editor with a toolbar containing icons for clipboard, list, bold, italic, underline, and more options. The text in the editor reads: 'Dear \${m://FirstName}', 'Follow this link to the Survey: \${t://SurveyLink?d=Take the Survey}', 'Or copy and paste the URL below into your internet browser: \${t://SurveyURL}', and 'Follow the link to opt out of future emails: \${t://OptOutLink?d=Click here to unsubscribe}'. At the bottom right of the form are 'Cancel' and 'Save' buttons.

The clipboard icon creates a survey link – make sure you remember to include this somewhere and make it prominent.

Click “{a}” to add text from contact lists (which are called “panel fields” in this menu), like a respondent name. *This is an example of Qualtrics frequently changing things – until the middle of last year, ‘contact lists’ were called ‘panels’ but this change has not been reflected everywhere.*

{a} also gives you other “piped text” and the “opt-out” link – you must include an unsubscribe link or Qualtrics will refuse to send the email (but it can be in smaller text).

Later, you can create a “reminder email” (in line with the “contact potential respondents” section and the textbook), which will only be sent to respondents who have not completed your survey.

# Send Some Emails

Having set up your contact list and messages, return to a project screen – hit the logo in the top left corner then select your project.

In the top menu, click “distributions” then “emails” and “compose email”.

Select your contact list in the “to” field. Qualtrics can create a sample from your list, but for your purposes, select everyone.

Set the “when to send” time.

Add the subject.

Click “load a saved message” and select one of your invite messages from your library.

Check over the message and settings one last time, then click “send”.

The screenshot below shows the sample message from the previous section, ready to send to a sample list.

**Compose Email**

**To:** MSc Panel ▾ 2 Contacts

**From:** From Address: noreply@qemailserver.com From Name: Marc Betton Reply-To Email: mb795@bath.ac.uk

**When:** Send Now ▾

**Subject:** Something something survey ▾

**Message:** MSc test ▾ Save Save As

☰ ☰ (A) 🖼 Font ▾ Size ▾ **B** *I* U 🗑 More...

Dear \${m://FirstName}

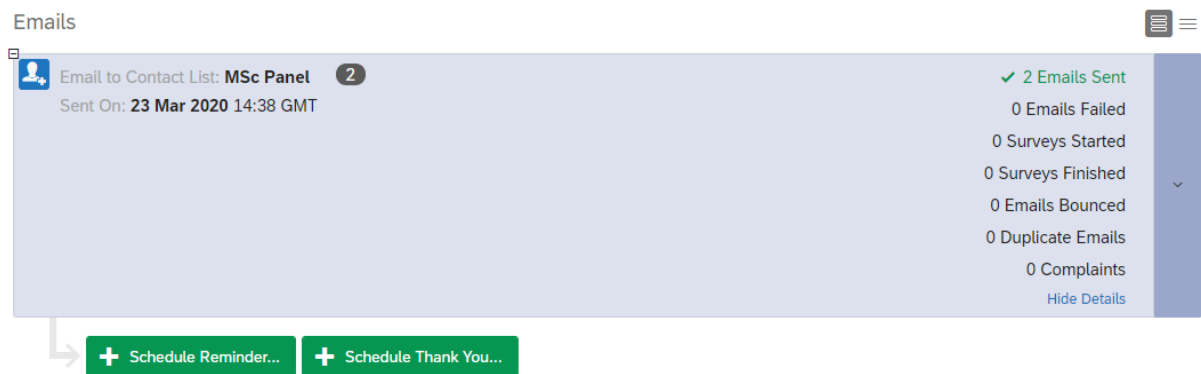
**Follow this link to the Survey:**  
\${f://SurveyLink?d=Take the Survey}

Or copy and paste the URL below into your internet browser:  
\${f://SurveyURL}

Follow the link to opt out of future emails:  
\${f://OptOutLink?d=Click here to unsubscribe}

Show Advanced Options Cancel Send Preview Email ✓ Send Now

The “emails” screen will now show your email distribution, along with bounced emails and a running count of the number of surveys started and completed.



You may want to remove any failed contacts, or recheck their email addresses.

You can also hit “schedule reminder” to send your reminder messages, which will only go to respondents who have not completed the survey. Similarly, “thank you” messages only go to those who have completed the survey.

# View Results as You Go

You can see results as they come in and download partial datasets if you wish.

For your project, click “data & analysis” then “data”.

Note that there is now a delay on seeing results.

By default, Qualtrics selects a random set of questions on this screen, so you will want to customise the page. Click “tools” then “choose columns”

Select any questions you particularly want to see and check out the “survey metadata” menu for start/end times, duration, etc.

Click any row to see the response in full.

In the screenshot below, a number of questions have been included and the “response type” field has been added. In this case, all the responses are “survey tests”, any previews you complete will show as “preview” responses (so you can delete or filter them out).

Add Filter Recorded Responses **50**  
Responses in Progress **0**

With Selected Page 1 of 3 Export & Import Edit Tools

| <input type="checkbox"/> | Recorded Date     | Q6 - Enter your email address to enter the prize draw. | Q3 - This is a session about surveys (tick one) | Q8 - List of Countries                | Q13 - Now, this is a session about surveys | Response Type | Actions                  |
|--------------------------|-------------------|--|---|---------------------------------------|--|---------------|--------------------------|
| <input type="checkbox"/> | 23 Mar 2020 14:52 | testemail@qemalserver.com                              | Strongly agree                                  | Saudi Arabia                          |  | Survey Test   | <input type="checkbox"/> |
| <input type="checkbox"/> | 23 Mar 2020 14:52 | testemail@qemalserver.com                              | Somewhat disagree                               | France                                |  | Survey Test   | <input type="checkbox"/> |
| <input type="checkbox"/> | 23 Mar 2020 14:52 | testemail@qemalserver.com                              | Agree   | Democratic People's Republic of Korea |  | Survey Test   | <input type="checkbox"/> |
| <input type="checkbox"/> | 23 Mar 2020 14:52 | testemail@qemalserver.com                              | Somewhat agree                                  | United States of America              |  | Survey Test   | <input type="checkbox"/> |
| <input type="checkbox"/> | 23 Mar 2020 14:52 | testemail@qemalserver.com                              | Agree   | Slovakia                              |  | Survey Test   | <input type="checkbox"/> |
| <input type="checkbox"/> | 23 Mar 2020 14:52 | testemail@qemalserver.com                              | Somewhat agree                                  | Thailand                              |  | Survey Test   | <input type="checkbox"/> |
| <input type="checkbox"/> | 23 Mar 2020 14:52 | testemail@qemalserver.com                              | Strongly agree                                  | Andorra                               |  | Survey Test   | <input type="checkbox"/> |

## Close the Survey

---

When you have sent all of your messages and chases and you are ready to close the survey and start cleaning then analysing your data.

From the “distributions” menu click “pause response collection”.

Consider what you want to do with partially completed responses – either allow them to be completed or close them as well. It is likely that when you reach this point, anyone who has not completed the survey will not be doing so.

Once you decide, hit “pause response collection”.

Anyone who tries to take the survey at this point will see the “survey closed” message you set in the “survey options” screen before launching.

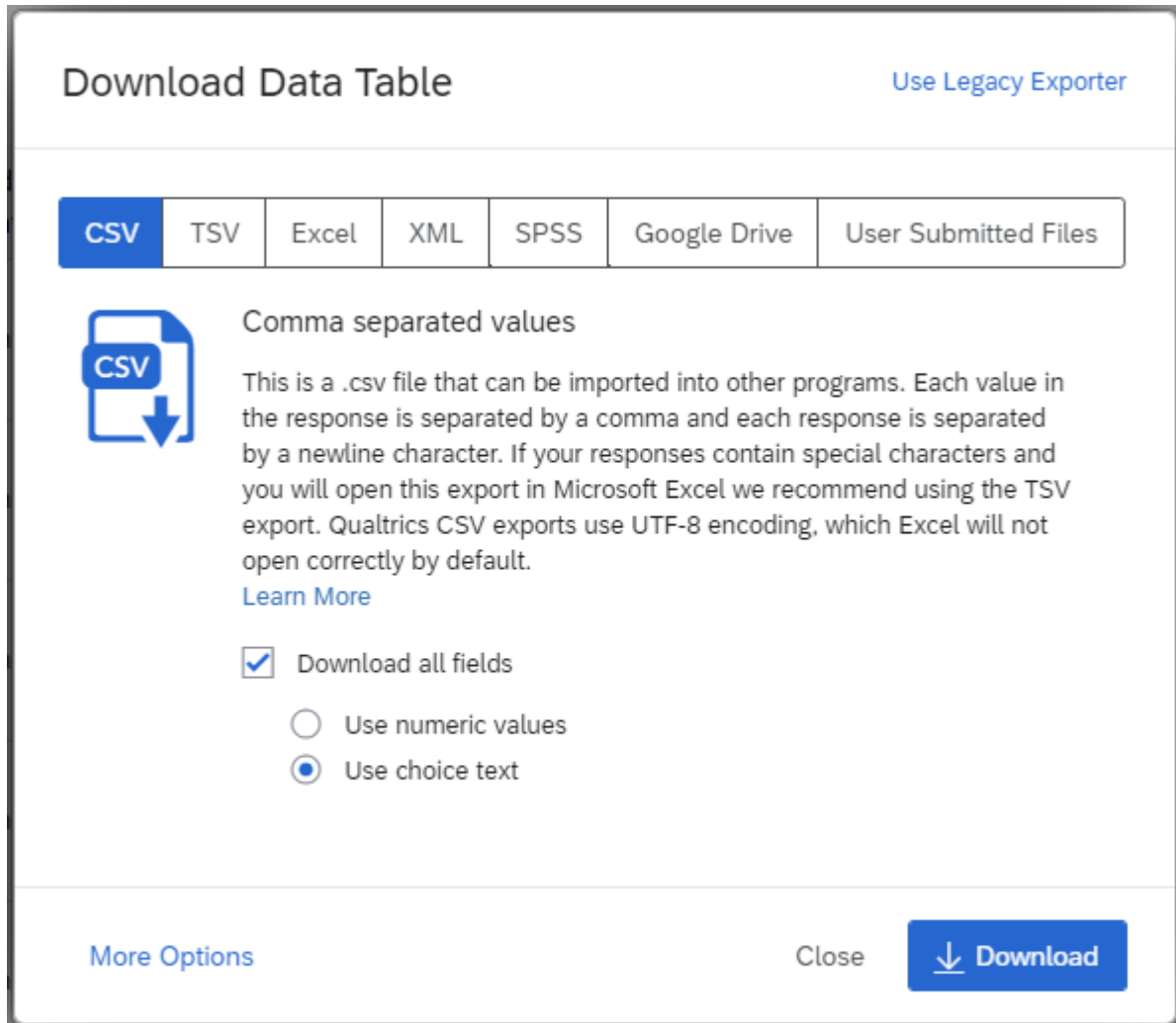
If necessary, you can launch the survey again to collect more data.



## Download Data


You can do this at any time to download the data which has been collected so far, but most importantly, you should do this at the end to begin cleaning and analysing your data.

For your project, click “data & analysis” then “export & import” and “export data”.



**Download Data Table** [Use Legacy Exporter](#)

CSV TSV Excel XML SPSS Google Drive User Submitted Files

 **Comma separated values**

This is a .csv file that can be imported into other programs. Each value in the response is separated by a comma and each response is separated by a newline character. If your responses contain special characters and you will open this export in Microsoft Excel we recommend using the TSV export. Qualtrics CSV exports use UTF-8 encoding, which Excel will not open correctly by default. [Learn More](#)

Download all fields

Use numeric values

Use choice text

[More Options](#) Close [Download](#)

You need to download the correct file for the programme you intend for your analysis.

For SPSS, select “SPSS” in the top menu and download the file. SPSS will present one line per response and will know each variable and how it is coded. The 1/A button will switch the view between codes and labels.



For (basically) anything else, such as Excel or STATA, select CSV.

Here, you will need to choose the field format. If you “use numeric values” the file will contain the coded number values for your data (which you can work out later). If you “use choice text” you will get the text itself (such as “strongly agree”) and you will have to code this yourself.

You will need to check and remove rows 2 and/or 3 (with question text) before importing into STATA.

In addition, you should probably ignore the location information fields, as they are often very inaccurate.

Also note that text & image questions (with no answer option) will not appear in the dataset. So if you have a block with an image question (as described before), you will need a full question with answer options to know what people saw.

## A Little More Qualtrics

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There are several more options from the survey screen under the “tools” menu.

Avoid multiple languages. There is a translation option, but you do not have the time to develop a survey in one language, then translate it and thoroughly check for translation and cultural issues, then translate all the responses. Pick whichever language is best suited for your survey and stick with it.

You can also copy an entire survey for backup or major revisions.

If you have a group project, you can share a survey by clicking “collaborate”. Then enter the name or email address of the person (who should also have a Qualtrics account) to share with. You can also set what they are allowed to do, such as view or edit questions and view or download responses.

Under “import/export” is an option to “export as Word”. This is a feature that has gotten better in recent months, but is most useful as a codebook. Download the Word file and you will see each question and the answers with a coded number at the end. If you download your data as a CSV with coded values, this is the easiest way to see the codes.

# Finally, Feedback, and Support

Remember that this is the first time the workshop has been presented in this manner. The slides from the live session have been expanded so that everything has been included, but that does make for a long document.

If there is any part of the document which you feel would benefit from changes, or if you have any questions (either in general, or specific to your work), please email me on [m.betton@bath.ac.uk](mailto:m.betton@bath.ac.uk). Questions will be answered and Skype chats can easily be arranged.

This document will likely be updated in light of feedback, so please let me know what you think.