Qualtrics Training Workshop

7 October 2019



NEW ZEALAND TOURISM RESEARCH INSTITUTE

AN INSTITUTE OF AUT UNIVERSITY

9.30	Introductions
	Why use online surveys
	Available surveys tools – free vs paid
	Why we use Qualtrics
	Accessing Qualtrics
10.45	Break
	Design considerations
	Creating a survey in Qualtrics survey builder
	Review of question types
	Making questions mandatory
12.30	Lunch
	Survey flow
	Exercise – Build a survey online
2.45pm	Break
	Testing/previewing surveys
	Making a survey live
	Reporting functions
	Exporting data – SPSS, Excel
4.30pm	Wrap up discussion and questions
	Home time!
	Home time:

Benefits of online surveys

- Convenient for respondents
- Long detailed inputs are possible
- More accurate
- Faster and cheaper
- Easy to add new questions/themes
- Convenient for researcher (one shot data entry)
- Multi language options

Challenges of online surveys

- Getting visitor email addresses
- Timeliness of email delivery
- Limited sampling and respondent availability
- Access to computers and internet
- Cultural difference
- Survey fraud

Selection criteria for an online survey tool

- Cost Free vs Paid
- Question types available to build survey
- Speed / Service availability for hosting survey
- Offline data collection (for in person interviews via tablet)
- Multi language support
- Mobile support
- Reporting features
- Data export formats (SPSS, CSV etc)

Survey tools

Many companies offer online survey functionality. These are just a few:

- Qualtrics
 - <u>http://www.qualtrics.com</u>
- Question Pro
 - <u>http://www.questionpro.com</u>
- Survey Monkey
 - <u>http://www.surveymonkey.com</u>
- Google Forms
 - https://www.google.com/forms/about/
- Lime Survey (open source)
 - <u>http://www.limesurvey.org</u>

Why Qualtrics

- NZTRI has been using Qualtrics for over 7 years
- Qualtrics is AUT's survey and questionnaire tool
- Qualtrics delivers the tools to create, administer and analyse data from surveys and polls.
- One click data export into SPSS,CSV
- Survey collaboration and sharing between colleagues and institutions

Survey & Question Design

- Question design considerations
- Mode of data collection (paper vs computer vs mobile)
- Questions keep it simple
- Question order
- Length of survey
- Filtering and branching
- Test your survey

Harvard University Program on Survey Research tip sheet http://psr.iq.harvard.edu/book/questionnaire-design-tip-sheet

An ideal question accomplishes 3 goals¹

- It measures the underlying concept it is intended to tap
- It doesn't measure other concepts
- It means the same thing to all respondents

Online surveys

- Consider appropriateness of question type
- Radio buttons vs Checkbox
- Radio buttons vs Dropdown lists
- Interactive slide, click, drag and drop
- Combining question types
- Internet availability / speed
- Mobile vs Desktop browser
- Validation of input

Open Ended vs Closed Ended Questions

- Open Ended
 - + Allows greater insight/variety of answers
 - + New categories/themes could emerge
 - Answers from respondents may not be on point
 - Time consuming to analyze
 - Respondents are more likely to skip an open ended question
 - Quality of data e.g. words like 'traffic' or 'roads' with no further explanation

Open Ended vs Closed Ended Questions

- Closed Ended
 - + Allow faster response for participant
 - + Quicker to analyse
 - + If well designed, respondents will interpret the question exactly as intended
 - + If well designed, respondents can only respond within the framework provided by the question
 - Quality of data predetermines information gathered

Mandatory Questions

- Do we want to make questions mandatory?
- If you are making questions mandatory, think about why and how this may affect the results
- No response to a question can sometimes be telling us something

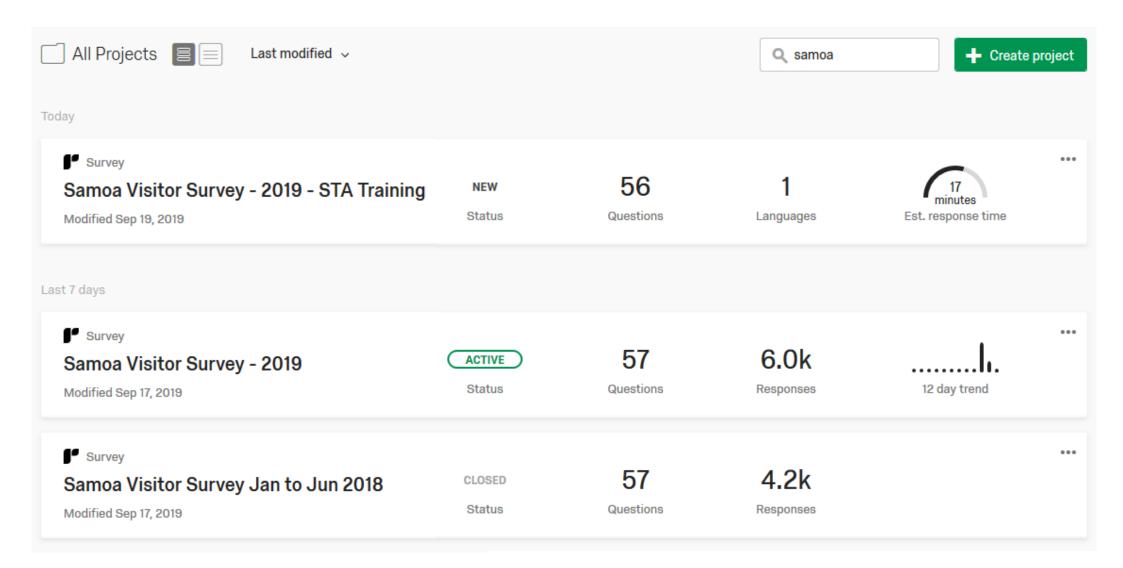
Exercise: Design a survey

- Draft a survey without using Qualtrics
- Prepare up to 10 questions
- The survey can be about anything you choose.

Some ideas:

- An event survey
- Customer satisfaction survey
- Accommodation survey
- Destination survey

Qualtrics surveys - Samoa examples



www.qualtrics.com

C	qualtrics [™]						
. (Username						
	Password						
	Sign In						
Forgot you	Ir password?						
Don't have	e an account? GET STARTED						

Create Your Free Account

Tell us about yourself First Name Last Name

Work Email

This will be your username.

Password

Company/Org

United States

Country

Phone

+1

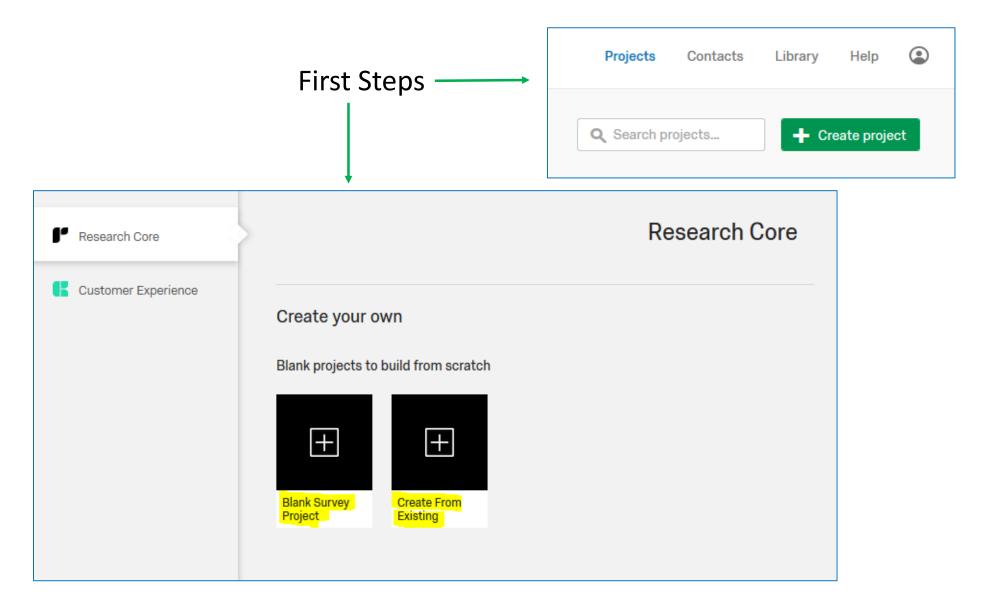
What's Included?

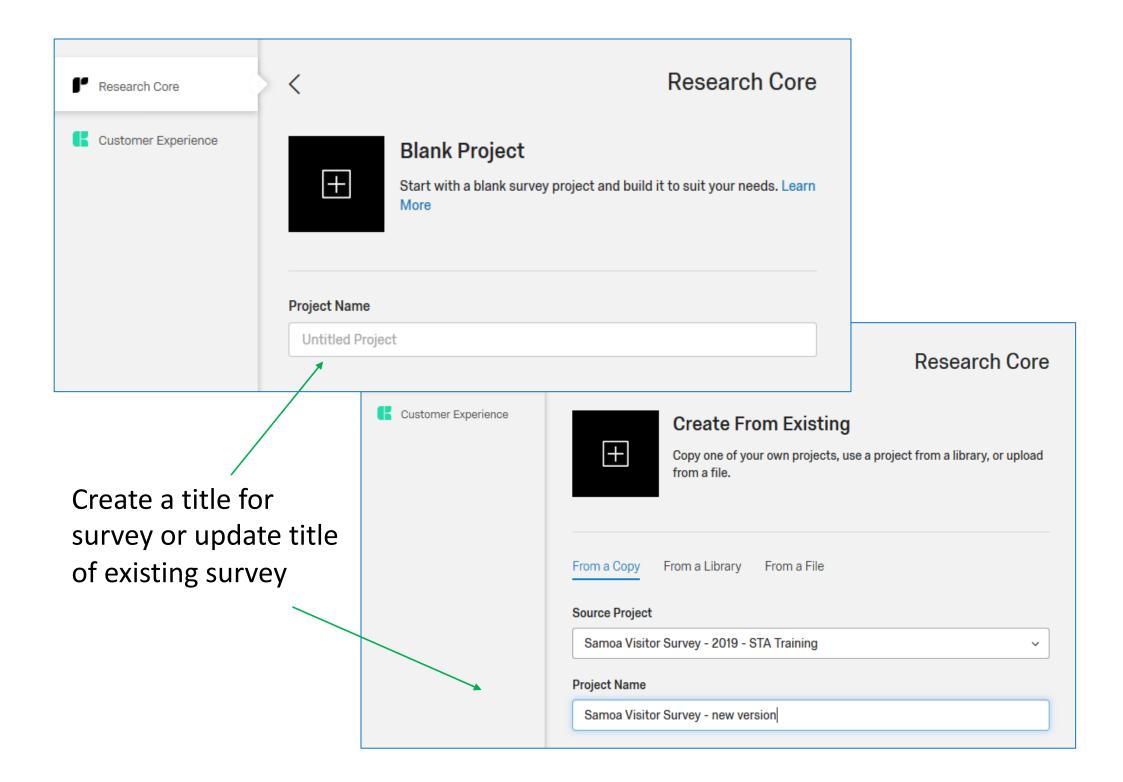
- + 100 Responses
- + 7 Question Types
- + One Active Survey (Upgrading will enable multiple active surveys)
- + 10 Questions per Survey
- + Summary Reports & Filtering
- + Survey Logic
- + Online Reporting (Upgrading will enable CSV/SPSS export)
- + Doesn't Expire

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Ext.

Creating a survey in Qualtrics

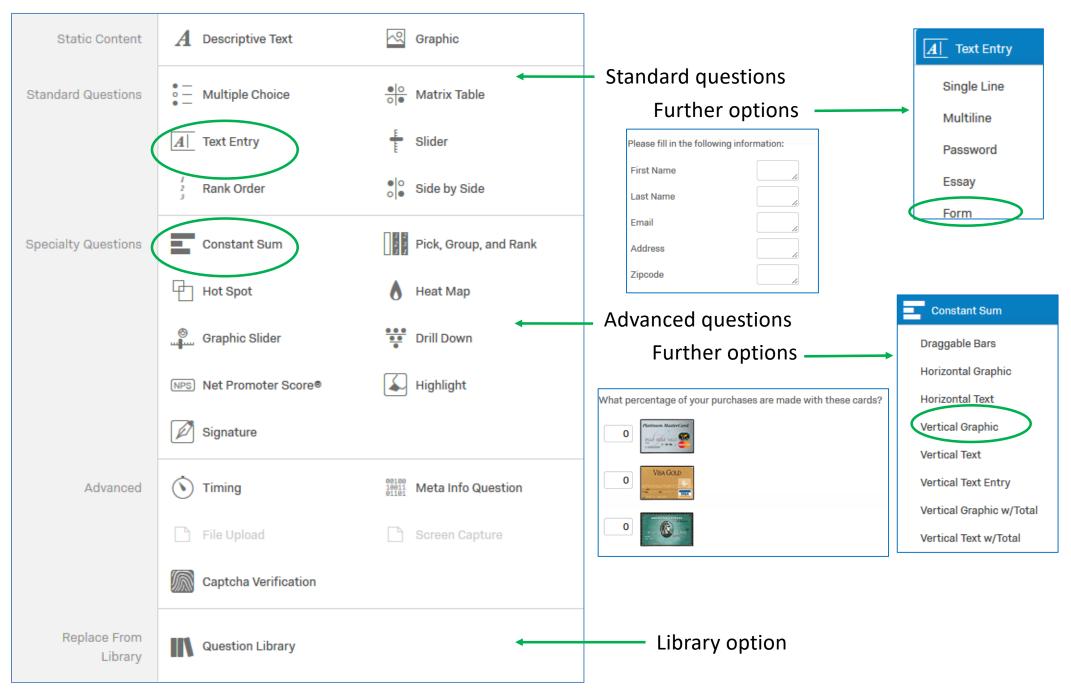




Creating survey questions

San	Samoa Workdshop								
▼ Default Question Block									
₽ Q1 \$	 Click to write Choice 1 Click to write Choice 2 Click to write Choice 3 								
^			Da Workdshop						
Creating survey questions		⊘ Q1	Click to write the question text O Click to write Choice 1 O Click to write Choice 2 O Click to write Choice 3						
Adding in a new		^	The Import Questions From	ition v					
question block ——		▼ Que	stion Block 2						
		~	🗐 Import Questions From 🕂 Create a New Ques	ition v					
			Add Block						

Qualtrics – choice of question types



Library of questions

Qualtrics surveys

Survey Library 25 Categories, 217 Surveys Question Library	<	Select a Library Type

	<	Please Select a Category		From previous surveys				
ys	Unas 6 Survey	signed						
Гуре	Academic Research ^{2 Surveys} Attention Filter ^{1 Survey} B2B ^{6 Surveys} Calendar		<	Please Select a Survey				
			APEC	C Voluntourism Survey				
			Auckland Transport old survey My Survey					
	1 Survey	nunity	My Surv					
		ept Tests	My Surv	Auckland Transport Survey - online version 11 March ^{Iy Survey} Auckland Transport Survey - Review copy 15 Feb				
	Custo 13 Surve	omer Service	My Surv Auck My Surv	kland Transport Survey - Review copy 25 Feb				
	12 Surve	, 	Auck My Surv	kland Transport Survey -Paper version				
	Educa 23 Surve	ys	Chall My Surv	lenge Wanaka - Athlete - 2014 - UPDATED				
	Employee		Challenge Wanaka - Athlete 2013 My Survey					
			My Surv					
			_	A Islands Accommodation Monitor Occupancy Rate and Forward Bookings	əl			

Survey Blocks

Samoa Visitor Survey - 2019 - STA Training	iQ Score: Poor	Block Options 🗸
ABOUT YOUR VISIT (20 Questions)	Block Options 🗸	View Block
b. Opticification lange exception (1 Opportion) (15) and 8 Marries	Black Options	View Block In Survey Flow
Satisfaction loop question (1 Question)	Block Options 🗸	Collapse Questions
ABOUT YOUR VISIT - ACTIVITIES (10 Questions)	Block Options 🗸	Lock Block
		Question Randomization Loop & Merge
EXPENDITURE (14 Questions)	Block Options 🗸	Next/Previous Button Text
		 Move Block Up
ABOUT YOU (11 Questions)	Block Options ~	 Move Block Down
		Add Block Below
		Copy Block
		Copy Block To Library

- Copy Questions To Library...
- Delete Block...

Page Breaks

- Inserting a page break determines how many questions are seen at one time by the respondent
- Page breaks are used to guide respondents to relevant questions e.g. Yes/No responses

	Page Break
Q6.5	Did you find the information you were looking for? O Yes O No, can you please provide the main reason why not
	Page Break
Q6.6	Did you look for any visitor information <u>during your stay</u> on the Island? O Yes O No

Survey Logic

Display logic

• Good for displaying a single follow-up question

Skip logic

• Used for skipping questions or sections

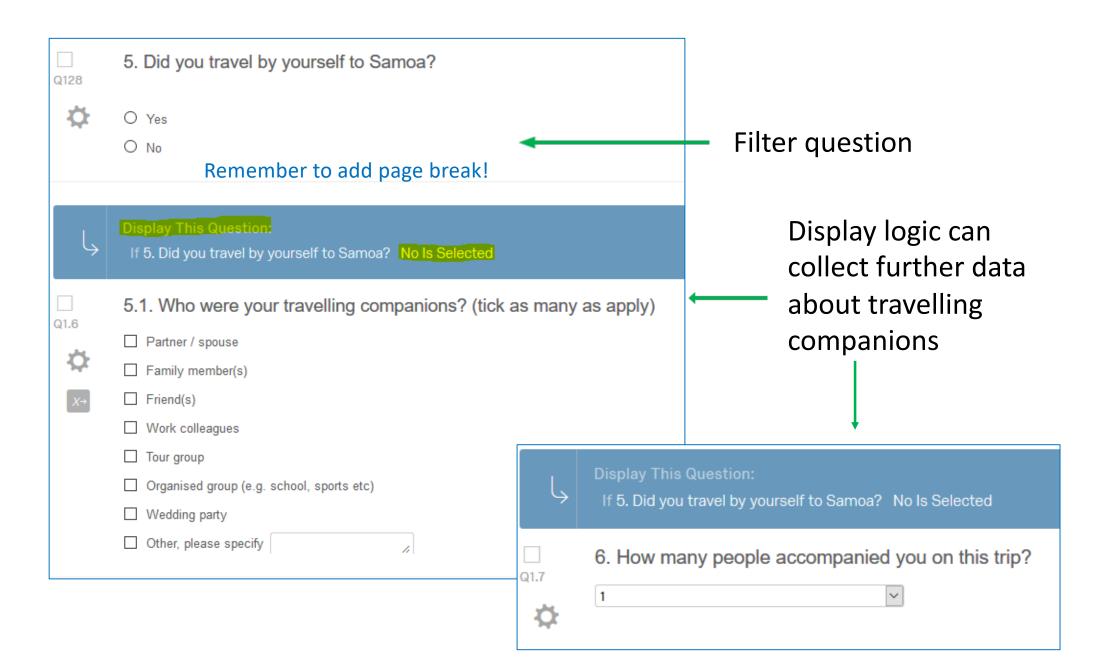
Carry forward

 Used for quantifying responses – e.g. most popular out of options selected

Branch logic – loop and merge

 Used to branch off when capturing data with context dependent sections

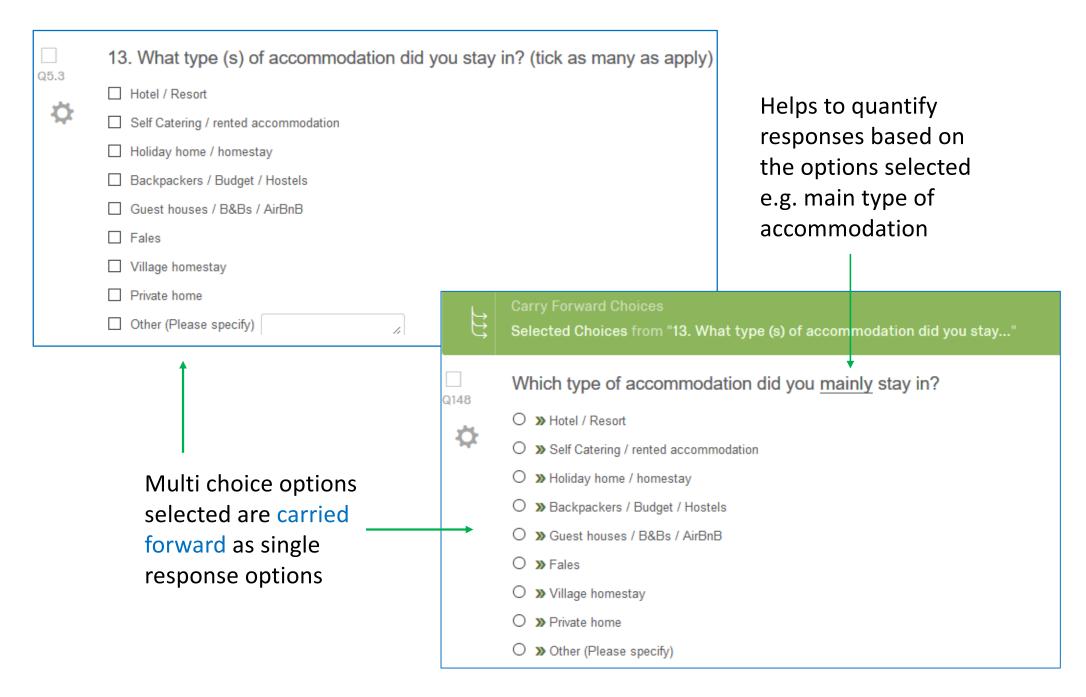
Display Logic



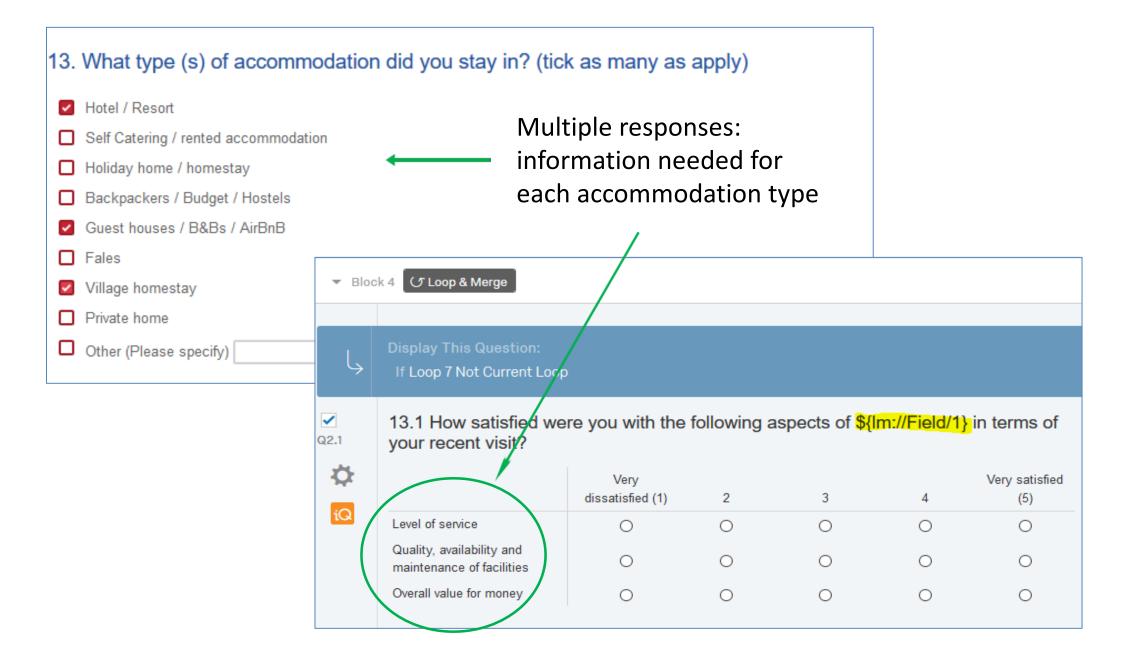
Skip Logic

Q4.2	 19. Did you prepay for any Yes No 			Skip logic helps with the survey flow so only
Q4.3			Samoa (include purchases made	relevant questions are asked.
☆		Total Spend	Currency	
X→			Guirency	
	Prepaid Travel Expenses	Please use numbers o	O Yes	ney while in Samoa?
		× •	O No →	
			Condition: No Is Selected. Skip 1	o: 23. Is Samoa the only country you vis

Carry Forward



Loop and Merge – set up



Questions generated by loop and merge

13.1 How satisfied v recent visit?	were you with the fol	lowing aspects of Hot	<mark>el / Resort</mark> in te	erms of your			
	Very dissatisfied (1)	2 3	4	Very satisfied (5)			
Level of service	0	0 0	0	0			
Quality, availability and maintenance of facilities	13.1 How satisfied	were you with the foll	lowing aspects	of <mark>Guest hou</mark>	ises / B&Bs /		
Overall value for money	AirBnB in terms of	your recent visit?					
	-	Very dissatisfied (1)	2	3	Very satis 4 (5)	fied	
	Level of service	0	0	0	0 0		
	Quality, availability and maintenance of facilities Overall value for money	13.1 How satisfied w your recent visit?	vere you with t	he following a	aspects of <mark>Villag</mark>	e homesta	<mark>ıy</mark> in terms of
	L	-	Very dissatisfied (1) 2	3	4	Very satisfied (5)
		Level of service	0	0	0	0	0
		Quality, availability and maintenance of facilities	0	0	0	0	0
		Overall value for money	0	0	0	0	0

Preview survey layout and flow

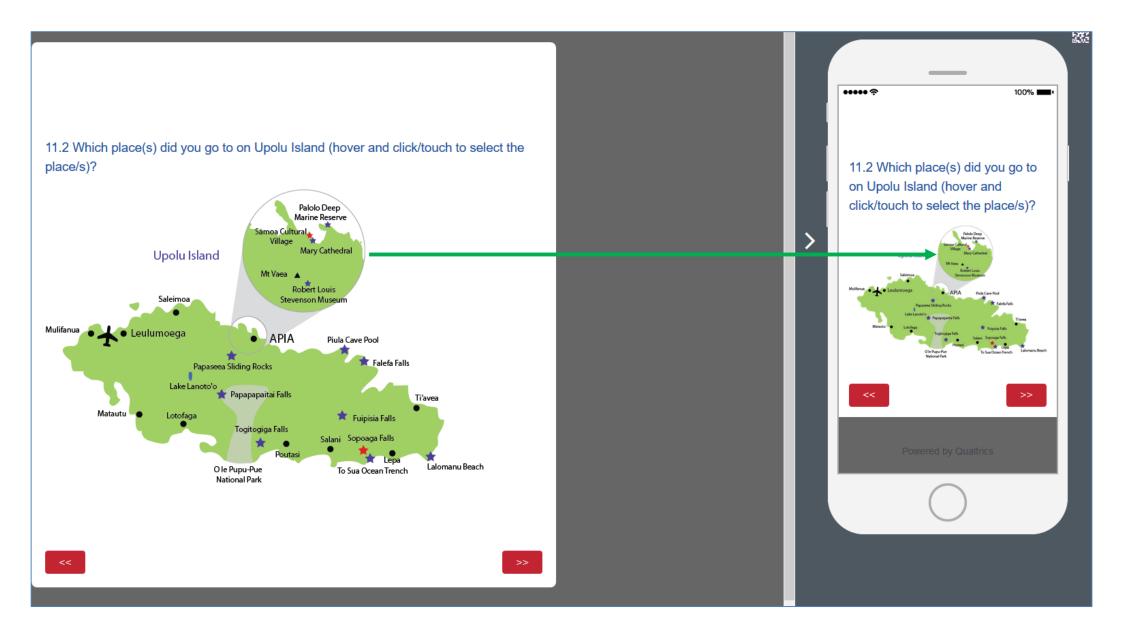
Samoa Visitor Survey - 2019 - STA Training					
ABOUT YOUR VISIT (21 Questions)					
Satisfaction loop question (1 Question)					
ABOUT YOUR VISIT - ACTIVITIES (10 Questions)					
EXPENDITE Survey Flow Samoa Visitor Survey - 2019 - STA Training	<u> </u>				
ABOUT YOU Show Block: ABOUT YOUR VISIT (21 Questions)	Ado	Below Mo	ove	Duplicate	Delete
Show Block: Satisfaction loop question (1 Question)	Ado	Below Mo	ove	Duplicate	Delete
Show Block: ABOUT YOUR VISIT - ACTIVITIES (10 Questions)) Ado	Below Mo	ove	Duplicate	Delete
Show Block: EXPENDITURE (14 Questions)	Ade	Below Mo	ove	Duplicate	Delete
Show Block: ABOUT YOU (11 Questions)	Ado	Below Mo	ove	Duplicate	Delete
+ Add a New Element Here					

Preview – test survey or individual questions

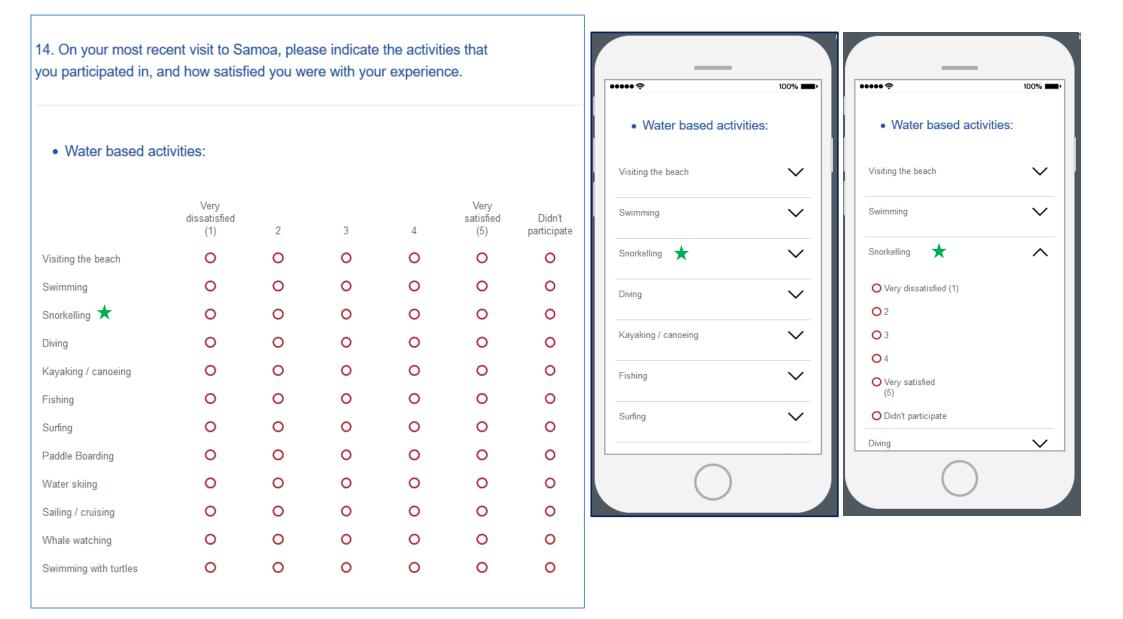
- Preview shows desktop and mobile version of the survey
- Restart or close preview of survey at any point

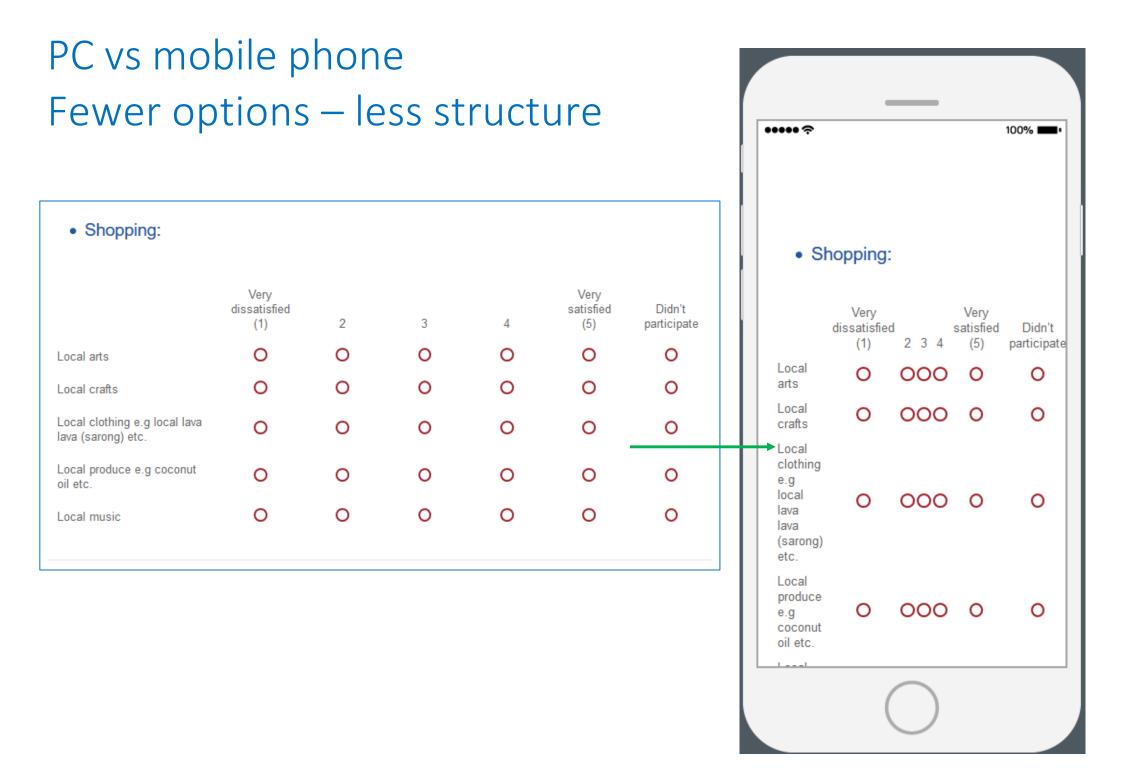
Close Preview Sestart Survey	*		Draft 🗸 💭 Place Bo	ookmark 🗸
	The Treasured Islands of the South Pacific	>	The Treasured Islands of the S	100%
	ABOUT YOUR VISIT This survey is about your most recent visit to Samoa (Western Samoa). Who should complete this survey? • Visitors to Samoa (not Samoan residents). • Visitors from American Samoa should also complete the survey. • Visitors aged over 18 years.		ABOUT YOUR VISIT This survey is about you recent visit to Samoa (W Samoa). Who should complete th • Visitors to Samoa (Samoan residents) • Visitors from Ameri	Vestern his survey? (not).

Desk top vs mobile phone – level of detail



PC vs mobile phone – Likert scale questions





PC vs mobile phone Question layout

22.2. How much did you spend <u>in</u> Samoa during your last visit? (estimate the amount spent in local currency - Samoan tālā - and enter numbers only e.g. 550)

	Savai'i	Upolu	Other
Accommodation			
Restaurants, cafes & bars			
Vehicle rental			
Petrol			
Bus / taxi			
Ferry			
Groceries			
Shopping (e.g. souvenirs, handicrafts)			
Tours and activities			
Donations (church / family)			
Internet / telecommunication services			
Other			

•••• ?	Savai'i	100% 🗰 Upolu
Accommodation		
Restaurants, cafes & bars		
Vehicle rental		
Petrol		
Bus / taxi		
Ferry		
Groceries		
Shopping (e.g. souvenirs, handicrafts)		
Tours and activities		
Donations (church / family)		
Internet / telecommunication services		
Other		

Respondent unable to view all questions at one time

Publishing a survey – going live

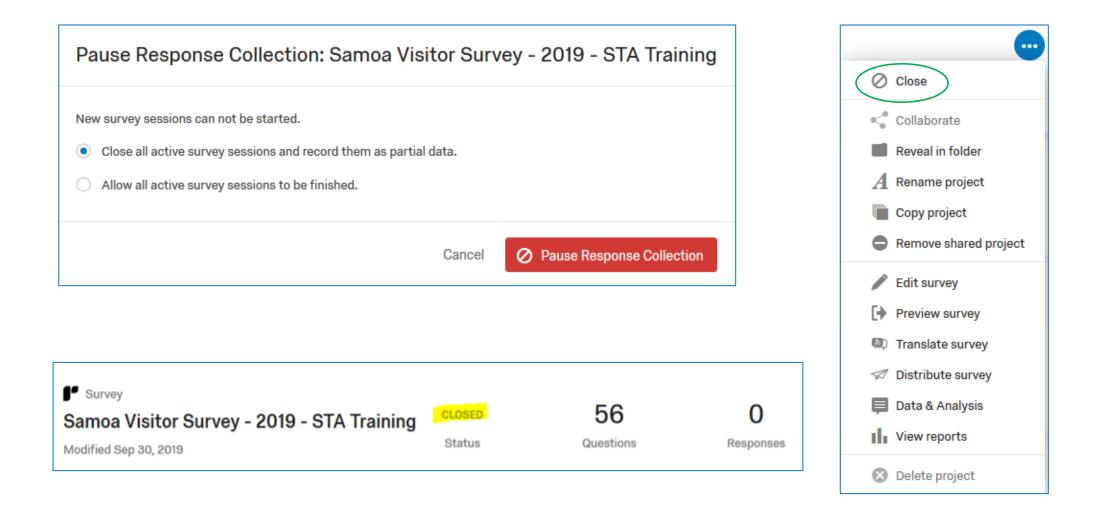
Samoa Visitor Survey - 2019 - STA Train	i ~			Projects	Conta	cts Library	
Survey Actions Distributions Data & Analysis Repo	rts						
🞻 Look & Feel 🥂 Survey Flow 🌣 Survey Options 🔍	Tools ~			[→ Prev	iew	↑ Publish	
You are currently making edits to this survey. Changes won't be live until you	publish.				×		
Samoa Visitor Survey - 2019 - STA Training	J	id	Score: Poor	🕕 Draft Ve	rsion		
ABOUT YOUR VISIT (20 Questions)				Block Options	•		
Satisfaction loop question (1 Question)	Publish Survey Publishing will upd	-	seen by respond	ents.		Ļ	
ABOUT YOUR VISIT - ACTIVITIES (10 Questions)	Details Add a description for		ý		^		
EXPENDITURE (14 Questions)	User-published	VEISION			-	ExpertReview Survey strength: Fa Recommendations	
ABOUT YOU (11 Questions)				>		View recommenda	tions
						Cancel	Publish

Live survey with URL

 Survey 				
Samoa Visitor Survey - 2019 - STA Training	ACTIVE	59	0	
Modified Sep 30, 2019	Status	Questions	Responses	12 day trend

Survey Activated	
Your survey has been successfully published and activated. You can distribute it using the a link below.	nonymous
https://aut.au1.qualtrics.com/jfe/form/SV_3dVBB1rqRHbfzG5	
You can also navigate to the distributions section to view more options.	
	Close

Closing the survey



Qualtrics – Viewing results

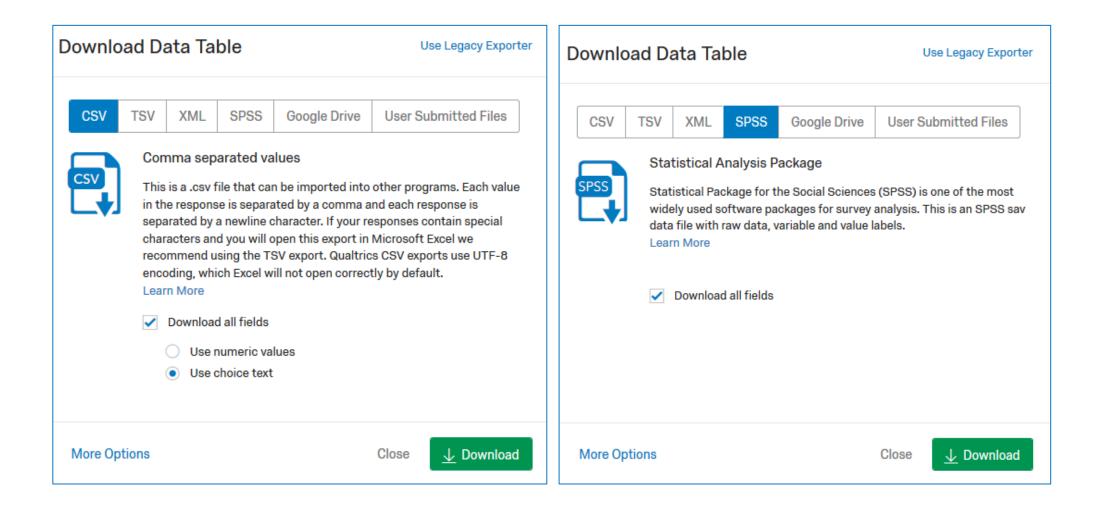
		Respo	nse Quality 100% Recorded Re Responses in	esponses 4,256 n Progress 0
< Page 2 of 213 <		<u>+</u>	Export & Import 🗸 🖌 🖌 Edit	🔾 Tools 🗸
Q2 - 2. How many nights did you spend in Samoa on your most recent visit?	Q128 - 5. Did you travel by yourself to Samoa?	Q4.2 - 19. Did you prepay for any of your travel arrangements prior to arrival?	Q4.7 - 22. Did you spend any money while in Samoa?	Actions
				~
7	Νο			~
7	Νο	Yes	Yes	~
8	Νο	Yes	Yes	~
11	Νο	Yes	Yes	~
9	Νο	Yes	Yes	~
10	Νο	Yes	Yes	~

Reporting in Qualtrics

XM Samoa Visitor Survey Jan to Jun 2018 ~	Share Report ∨
Survey Actions Distributions Data & Analysis Reports	📋 Data Source 🗙
Results Reports	Q1.4 - 2. What was the main purpose of your visit?
Report: Initial Report - Add Filter -	Decimal Places
- Add Report Breakout C1.4 - 2. What was the main purpose of your visit?	Default (2) ~
Q Search Questions	Breakout By
+ Create Custom Page	Default (None) ~
Q1.4 - 2. What was the main purpose of your visit?	Title
Q1.5 - 4. How did you travel to / from Samoa? (tick as many as apply)	Default - Click to edit
Clippy 6.35% Clippy 1.81% Introduction 1.01%	Visualization
Q1.7 - 6. How many people accompanied you on this trip?	9% Inner Radius
$\Theta \mid O \\ O \mid \Theta \mid O $ Q3.2 - Water based activities: $\Theta \mid O \\ O \mid \Theta \mid O $ Q3.3 - Cultural interaction: 15.31%	Grouping Percentage Threshold
• • • • • • • • • • • • • • • • • • •	Show As Percentages
elo ole Q3.5 - Shopping:	Color Palette

Exporting data

Data & Analysis tab - export & import option



Additional resources

Refer to Qualtrics Learning Resources Extensive support provided