

# Creating and Analyzing Qualtrics Surveys

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For  
Research Methods in Political Science  
Professor Colin Brown



# Sample: Campus Commute

Take a few minutes to fill out this survey. We will use this to point to examples:

[https://bit.ly/diti\\_qualtrics\\_survey](https://bit.ly/diti_qualtrics_survey)



# Workshop Agenda

- Introduction to Qualtrics Forms for Survey Creation
- Survey Questions Tips
- Programming Different Types of Survey Questions
- Exporting and Analyzing Surveys from Qualtrics

Slides, handouts, and sample survey available at:

<https://bit.ly/diti-sp22-brown-qualtrics>



# Research Ethics

While doing official research involving human subjects, always:

1. Get IRB (Institutional Review Board) approval
2. Find the right, secure survey tool to use; Northeastern uses Qualtrics, which is secure for keeping your results private
3. Understand that your specific questions will gather specific answers. Try not to steer your participants in a particular direction, and always be wary of the vulnerabilities of the demographic(s) you're studying.



# Qualtrics

- Qualtrics is a great survey option for more formal surveys.
- You can use it in many industries: political campaigns, marketing, academia and many others.
- It has many pre-programmed, built-in questions which can save you a lot of time.

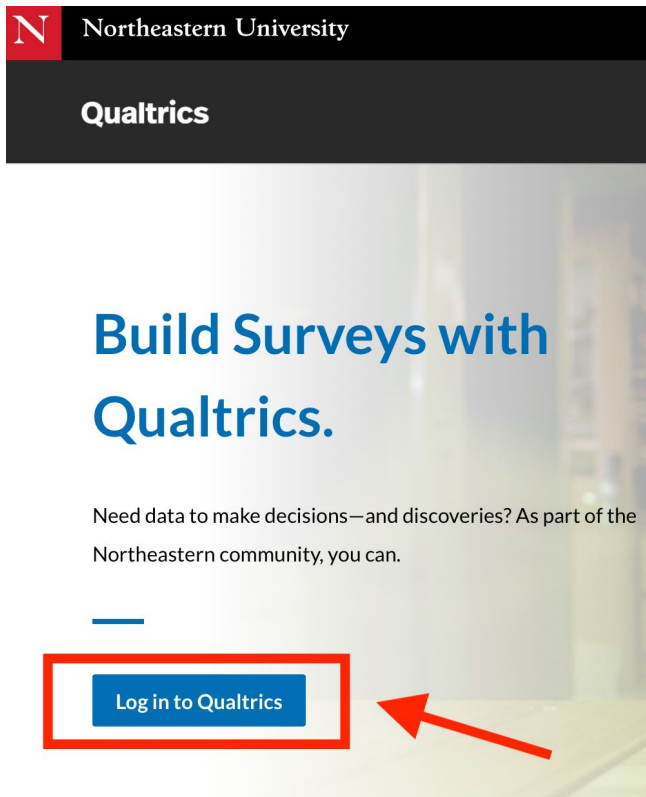


- You can login with your Northeastern credentials: [qualtrics.northeastern.edu](https://qualtrics.northeastern.edu)



# Once in Qualtrics

**Step 1.** Log in  
with your  
Northeastern  
credentials .



## Step 2. Begin the project

The screenshot shows the XM dashboard. At the top left is the XM logo and a 'Home' link. Below the logo is a 'Welcome to XM' message with a user profile icon (Y) and a settings gear. A search bar is present with the placeholder text 'Search by name, type, owner...'. On the left sidebar, under 'Recently visited', there is a list of surveys: 'Communing Habits of Northe...', 'Flex pilot survey for FACEB...', 'My Sample Survey', and 'Facebook Warehouse Biling...'. The 'Create a new project' button at the bottom of the sidebar is highlighted with a red box. On the right, the 'Active surveys' section displays three survey cards: 'Warehouse pilot survey', 'Introduction & Team Formation Form - Fa...', and 'Facebook Warehouse E'. Each card shows '0 new responses' and a total response count. A red arrow points from the 'Warehouse pilot survey' card to a text box that says 'You will see your active and recently visited surveys.' Another red arrow points from the 'Create a new project' button to a text box that says 'Start by clicking “Create a new project”'. Below the active surveys is a 'Your workflows summary' section with a 'Create a workflow' button and a 'Learn more about workflows' link.

XM    Home

Welcome to XM

Search by name, type, owner...

Recently visited    [See all projects](#)

Survey  
Communing Habits of Northe...    New

Survey  
Flex pilot survey for FACEB...  
23 Responses    Active

Survey  
My Sample Survey    New

Survey  
Facebook Warehouse Biling...  
1354 Responses    Active

Create a new project

Active surveys

Warehouse pilot survey    ☆  
0 new responses  
104 total responses

Introduction & Team Formation Form - Fa...    ☆  
0 new responses  
43 total responses

Facebook Warehouse E  
0 new re:  
1.4K total responses

You will see your active and recently visited surveys.

Your workflows summary

Set up your first workflow to automate important actions and drive efficiency

Create a workflow    [Learn more about workflows](#)

Start by clicking “Create a new project”



# Step 3. Open a blank project



Search the catalog

## ► Type

## ▼ What you're measuring

Customers

Employees

Markets

Students

Website and app visitors

## ▼ Department

Customer experience

Education

Human resources

## Create a project

From scratch



Survey

## Guided projects

Start building using a pre-built solution with step-by-step guidance



### Concept Testing (Basic)

Assess the strengths and weaknesses of potential new products or services



### Pricing Study (Van Westendorp)

Identify optimal product pricing with 4 simple questions



### Product Naming

Find the best name product

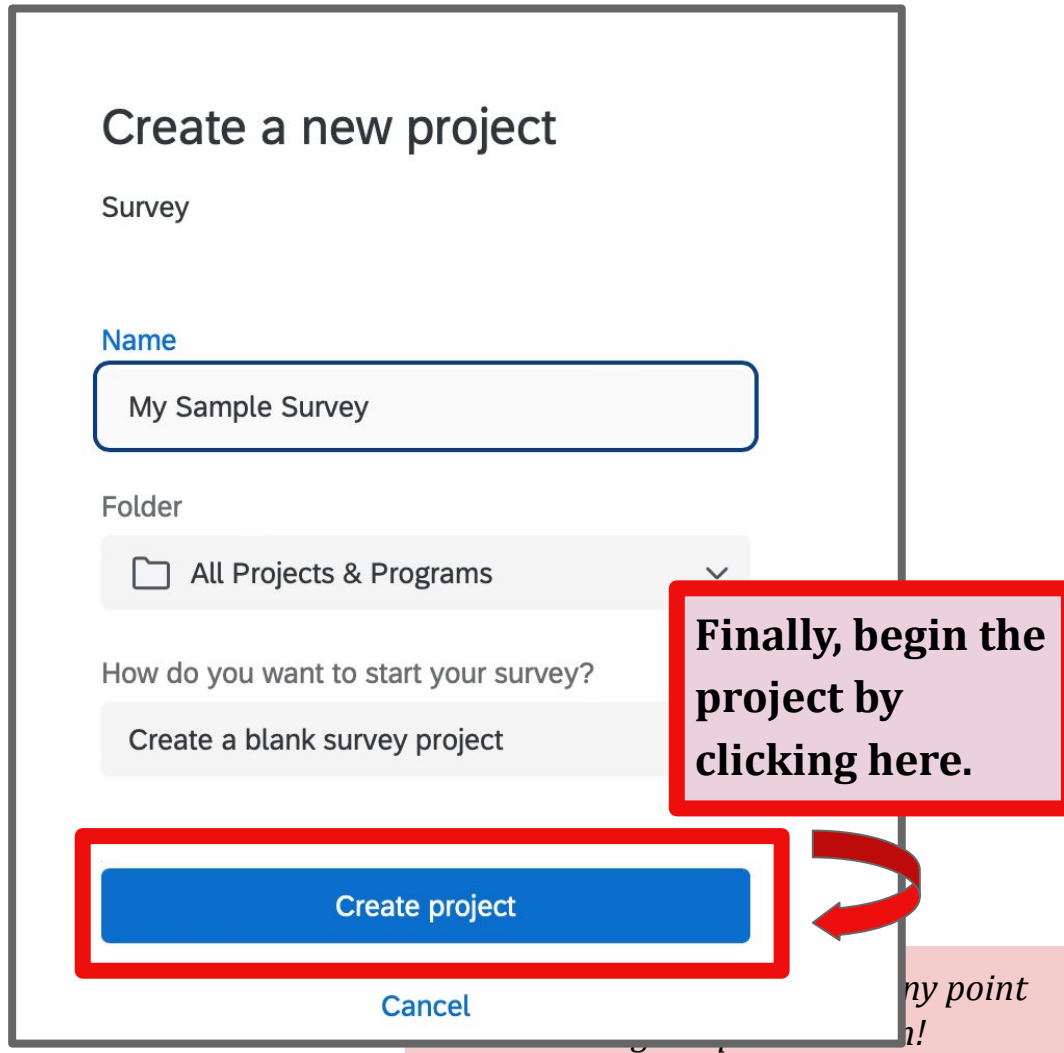
Once you begin, you will have the option to either start from scratch or import the pre-built survey options.





## Step 4. You can:

- Name your survey right away or do it later.
- Place it in a folder (especially, if you have several survey projects)
- Start a blank survey or export the pre-built survey questions. A blank survey option is the most common.



The screenshot shows a 'Create a new project' dialog box. It has a title bar 'Create a new project' and a subtitle 'Survey'. Below the subtitle, there are three sections: 'Name' with a text input field containing 'My Sample Survey'; 'Folder' with a dropdown menu showing 'All Projects & Programs'; and 'How do you want to start your survey?' with a button labeled 'Create a blank survey project'. At the bottom, there is a large blue button labeled 'Create project' and a smaller blue button labeled 'Cancel'. A red box highlights the 'Create project' button, and a red arrow points from a text box to it. The text box contains the text 'Finally, begin the project by clicking here.'

Create a new project

Survey

Name

My Sample Survey

Folder

All Projects & Programs

How do you want to start your survey?

Create a blank survey project

Create project

Cancel

Finally, begin the project by clicking here.



# Basic Anatomy of Qualtrics

The screenshot displays the Qualtrics web application interface. At the top, there is a navigation bar with the Qualtrics logo (XM) and a menu icon. Below this, a horizontal tab bar contains several tabs: 'Survey', 'Workflows', 'Distributions', 'Data & Analysis', 'Results', and 'Reports'. The 'Survey' tab is currently selected and highlighted with a red underline. A red oval encircles the 'Survey' tab and the vertical toolbar on the left side of the interface. The vertical toolbar contains several icons, including a clipboard, a list, a question mark, and a document. A red arrow points from the 'Reports' tab to a text box on the right. Another red arrow points from the 'Survey' tab to a text box at the bottom left. The main content area shows the 'Edit question' interface for a 'Multiple choice' question. It includes options for 'Answer type' (Allow one answer or Allow multiple answers) and 'Choices' (Number of choices, currently set to 3). The question text area is empty, and there are buttons for 'Import from library' and 'Add new question'. At the bottom, there is a section for 'End of Survey' with a message: 'We thank you for your time spent taking this survey. Your response has been recorded.'

**Once the survey is ready, you will distribute it and analyze the subsequent results in these section (all horizontal tabs)**

**All major survey design options (question type, the # of answer choices, etc.) will be located here, in the "Survey" tab and all of the vertical tabs.**

# Blocks and Questions

You will see spaces for a survey title, block title, questions and answer choices.

edit question

question type

Multiple choice

Answer type

Allow one answer

Allow multiple answers

Choices

number of choices

3

edit multiple

use suggested choices

Tools

Saved at 6:33 PM

Draft

Commuting Habits of Northeastern Students

Block Title

Question

Text of the question

Click to write Choice 1

Click to write Choice 2

Click to write Choice 3

Survey and block titles are visible to you only!

Import from library

Add Block



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Feel free to ask questions at any point during the presentation!

# Different Types of Questions

**Multiple choice:** questions that only have specific answers and the user can only click one. For example, “What is your favorite physical exercise?”

**Likert-scale:** a type of response scale in which respondents can specify their level of agreement, importance or satisfaction typically in 5 points, (1) strongly agree to (5) strongly disagree.

**Checkboxes:** questions that only have specific answers and the user can click multiple. For example, “select all the physical exercises you did last week”.

**Linear Scale:** questions that invite users to choose from a lower to higher number that match their experience. Typically, on a scale from 1 to 10; allows a more granular measure of affect and participants are able to express their degrees of response.

**Paragraph/Short Answer:** open-ended questions that usually invite longer prose. For example, “Describe your favorite gym exercise and how it makes you feel”.



- “On a scale from 1 to 10 please rate the discounted semester pass program.”
  - Scientific or technical jargon. Your respondents may or may not be aware of the program or, perhaps, it’s the first time they heard this title.
- “Do you think that many programs that are currently reviewed by the university administration, like the expansion of bike lanes on campus, would be environmentally friendly and affordable?”
  - Vaguely worded and double-barreled.



- “Do you think the inept university administration should for once finally do something about improving our campus commuting experience? ”
  - Try to avoid biased judgmental language and anything that your respondents might find off-putting!
- How long does it take you to commute to campus on a typical day?
  - Less than 10 minutes
  - 11-20 minutes
  - 15-35 minutes
  - 25-40 minutes
  - 41-50 minutes
  - 51-60 minutes
  - More than one hour

Overlapping Answers are a Common Mistake



- Do you always take the MBTA when you commute to campus?  
Choices: Sometimes, Rarely, Never
- “Always” is confusing. The feedback from this question will not be very useful.
- Does not the MBTA provide adequate resources for commuters? Choices: Yes/No
- Double-negatives are incredibly confusing for survey takers
- Mismatched answer choices, random questions that do not fit thematically and many other problems that can be fixed by reading the questions out loud or to peers!



# Answer Choices in Qualtrics

- You can find the common question types we just discussed and many many more in Survey Builder. Here is the example of a Likert scale question.

**In “Survey” tab, click “Builder”. Then select the question type.**

The screenshot shows the Qualtrics Survey Builder interface. The 'Survey' tab is active, and the 'Builder' sub-tab is selected. The 'Question type' dropdown menu is open, showing various question types. The 'Matrix table' option is highlighted. A red arrow points from the 'Builder' sub-tab to the 'Question type' dropdown. Another red arrow points from the 'Matrix table' option to a preview window on the right. The preview window shows a matrix table with 4 rows and 4 columns. The first column contains blue bars, and the other three columns contain radio buttons. The text 'Matrix table' is displayed below the preview, along with a description: 'Matrix table questions combine multiple questions with the same answer choices into a single table.'

XM    Untitled project

Survey    Workflows    Distributions    Data & Analysis    Results    Reports

Builder    Survey flow    Look and feel    Survey options

Edit question

Question type

Multiple choice

Multiple choice

Text entry

Text / Graphic

Matrix table

Slider

Form field

Rank order

Side by side

NPS    Net promoter score

End of Survey

Untitled project

Tools    Saved Jan 19, 2022 at 6:07 PM    Draft

Matrix table

Matrix table questions combine multiple questions with the same answer choices into a single table.

Add Block





# Answer Choices in Qualtrics. Likert Scale

**Choices**

Number of choices

— 5 +

[Edit multiple](#)

Use suggested choices ☒

Dissatisfied - Satisfied

☒ Reverse order

Choice display

☒ Show all

☐ Show first and last

**Format**

List

[Alignment](#)

Horizontal

Q5.

How satisfied are you with your transportation options for reaching the University?

Extremely satisfied   Somewhat satisfied   Neither satisfied nor dissatisfied   Somewhat dissatisfied   Extremely dissatisfied

End of Survey

[Import from library](#) [Add](#)

**You can select the number of answer choices, the alignment of these choices and other features of the question. Note that many options are pre-programmed already which will save you a lot of time! Explore “Use suggested choices”**





Multiple choice

Tools

Saved at 5:25 PM

Draft

## ▼ Answer type

- ☒ Allow one answer
- ☐ Allow multiple answers

## ▼ Choices

Number of choices

- 5 +

[Edit multiple](#)

Use suggested choices



Dissatisfied - Satisfied

Disagree - Agree

Dissatisfied - Satisfied

Inappropriate - Appropriate

Male - Female - Non-binary

True - False

Yes - No

- ☐ 11-20 minutes
- ☐ 21-30 minutes
- ☐ 31-40 minutes
- ☐ 41-50 minutes
- ☐ 51-60 minutes
- ☐ More than one hour

☒ transit\_optns\_satis

How satisfied are you with your transportation options for reach

- ☐ Extremely dissatisfied
- ☐ Somewhat dissatisfied
- ☐ Neither satisfied nor dissatisfied
- ☐ Somewhat satisfied
- ☐ Extremely satisfied

**Note how by selecting “Use suggested choices” you can automatically populate your answer choices**

# Programming in Qualtrics

**By labelling your questions (shorter titles preferred), you will save a lot of time in the analysis stage. Instead of question 1, question 2, etc. you will have meaningful labels that you can then add to your codebook.**

*ask questions at any point during the presentation!*

# If-Then: Go to Section Based on Answer

If you want to ask your respondents' consent to participate, conduct follow up interviews, or if you only want participants who put specific answers to see specific content, there are two options available for that.

- Skip logic
- Display logic

Let's explore them in Qualtrics.



# Skip Logic

The screenshot displays the Qualtrics Survey Builder interface. The top navigation bar includes tabs for Survey, Workflows, Distributions, Data & Analysis, Results, and Reports. The left sidebar contains a list of tools, with 'Skip logic' highlighted in blue. A red arrow points from the 'Skip logic' option in the sidebar to the 'Skip logic' configuration window. The configuration window is titled 'Skip logic' and shows a dropdown menu for 'Skip from this question to' with options: 'End of Survey', 'Yes, I consent', and 'No, I do not consent'. The 'End of Survey' option is selected. A red arrow points from the 'End of Survey' option to the 'Skip logic' configuration window. The background shows a survey question titled 'consent\_form' with a list of four items. A red arrow points from the 'Skip logic' configuration window to the 'Skip logic' option in the sidebar.

Survey Workflows Distributions Data & Analysis Results Reports

List Alignment Vertical Add choice group

Response requirements

Add requirements Add validation

Question behavior

Display logic

**Skip logic**

Carry forward choice

Choice randomization

Recode values

Default choices

Tools Saved at 5:49 PM Draft

consent\_form

Here is some general information about this research project.

1. This research is being conducted by Northeastern University.
2. The purpose of this research is to understand the experiences of Northeastern University students.
3. You must be at least 18 years old to participate in this research.
4. Your participation in this study will be handled in a confidential manner. Any reports or publications based on this research will use only group data and will not identify you or any individual as being of this project.

Skip logic

Skip from this question to

End of Survey if No, I do not consent Is Selected

Yes, I consent

No, I do not consent

Cancel Confirm

Click on your question first. Then scroll down to “Question behavior” in “Survey builder”. Click on “Skip logic” and program how you want the survey to behave. Here, we tell Qualtrics to send the respondent to the end of the survey if the respondent does not consent to taking it.

See to ask questions at any point during the presentation!

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Tools ▾ Saved at 5:51 PM Draft

Preview Publish

choice ▾

pe

answer

iple answers

ices

+

consent\_form

Skip to

End of Survey if No, I do not consent Is Selected

Here is some general information on the study:

1. This research is being conducted by independent academic researchers at Massachusetts.

to learn more about the commuting habits of

3. You must be at least 18 years old to be in this research pro

Edit conditions

Advanced options...

Remove

**You will now have this label that tells you that “Skip logic “ has been programmed into the question.**

**You can always change the conditions by clicking the three dots on the right.**



# Display Logic

Add choice group

▼ Response requirements

Add requirements ☐

Add validation ☐

▼ Question behavior

↪ Display logic

↪ Skip logic

↪ Carry forward choices

↪ Choice randomization

↪ Recode values

⦿ Default choices

☐ Light Rail/Streetcar

☐ Commuter Rail

☐ Ferry

☐ Bike

☐ Car

☐ parking\_time

You selected "Car". How long, on average, does it take you to find a parking space?

☐ 0-2 minutes

☐ 3-5 minutes

**Click on the question that you want to display only to a specific group of respondents (in our case those who indicated that they commute by car). Then go to Survey Builder and scroll down (the way we did with Skip Logic)**



# Display Logic

What type of transportation do you primarily use each day to commute to and from campus? (select the mode used for the longest distance of your commute, only choose one option).

- ☐ Walk
- ☐ Bus
- ☐ Subway
- ☐ Light Rail/Streetcar
- ☐ Commuter Rail
- ☐ Ferry
- ☐ Bike
- ☐ Car

2. Once the logic is specified, the question will have a little icon that tells you the display logic

☒ parking\_time

 Display this question

If What type of transportation do you primarily use each day to commute to and from campus? (select... Car Is Selected

You selected "Car". How long, on average, does it take you to find a parking space?

- ☐ 0-2 minutes
- ☐ 3-5 minutes
- ☐ 3-5 minutes

Display Logic (You selected "Car". How long, on average, does it take you to fi

Display this Question only if the following condition is met:

Question ▾

transport\_type Wh...ampus? (select... ▾

Car ▾

Is Selected ▾

Select Question...



consent\_form He...by independent...

on\_off\_campus Do ...us or off-campus?

☒ transport\_type Wh...ampus? (select...

parking\_time You ... a parking space?

1. Specify the logic of the display. Here you are telling Qualtrics that this question should be displayed only to those who answered "Car" to transport\_type question. Note: that you can select ANY question from the list.

*Feel free to ask questions at any point during the presentation!*

# Display Logic

Display Logic (You selected "Car". How long, on average, does it take you to find a parking space?)

Display this Question only if the following condition is met:

Question ▾

transport\_type Wh...ampus? (select... ▾

Car ▾

Is Selected ▾

Select Question...



consent\_form He...by independent...

on\_off\_campus Do ...us or off-campus?

✓ transport\_type Wh...ampus? (select...

parking\_time You ... a parking space?

commute\_time How ...n a typical day?

transit\_optns\_sat... the t

1. Specify the logic of the display. Here you are telling Qualtrics that this question should be displayed only to those who answered "Car" to transport\_type question. Note: that you can select ANY question from the list.

What type of transportation do you primarily use each day to commute to and from campus? (select the mode used for the longest distance of your commute, only choose one option).

- ☐ Walk
- ☐ Bus
- ☐ Subway
- ☐ Light Rail/Streetcar
- ☐ Commuter Rail
- ☐ Ferry
- ☐ Bike
- ☐ Car

2. Once the logic is specified, the question will have a little icon that tells you the display logic



parking\_time

Display this question

If What type of transportation do you primarily use each day to commute to and from campus? (select... Car Is Selected

You selected "Car". How long, on average, does it take you to find a parking space?

- ☐ 0-2 minutes
- ☐ 3-5 minutes
- ☐ 3-5 minutes

Feel free to ask questions at any point during the presentation!

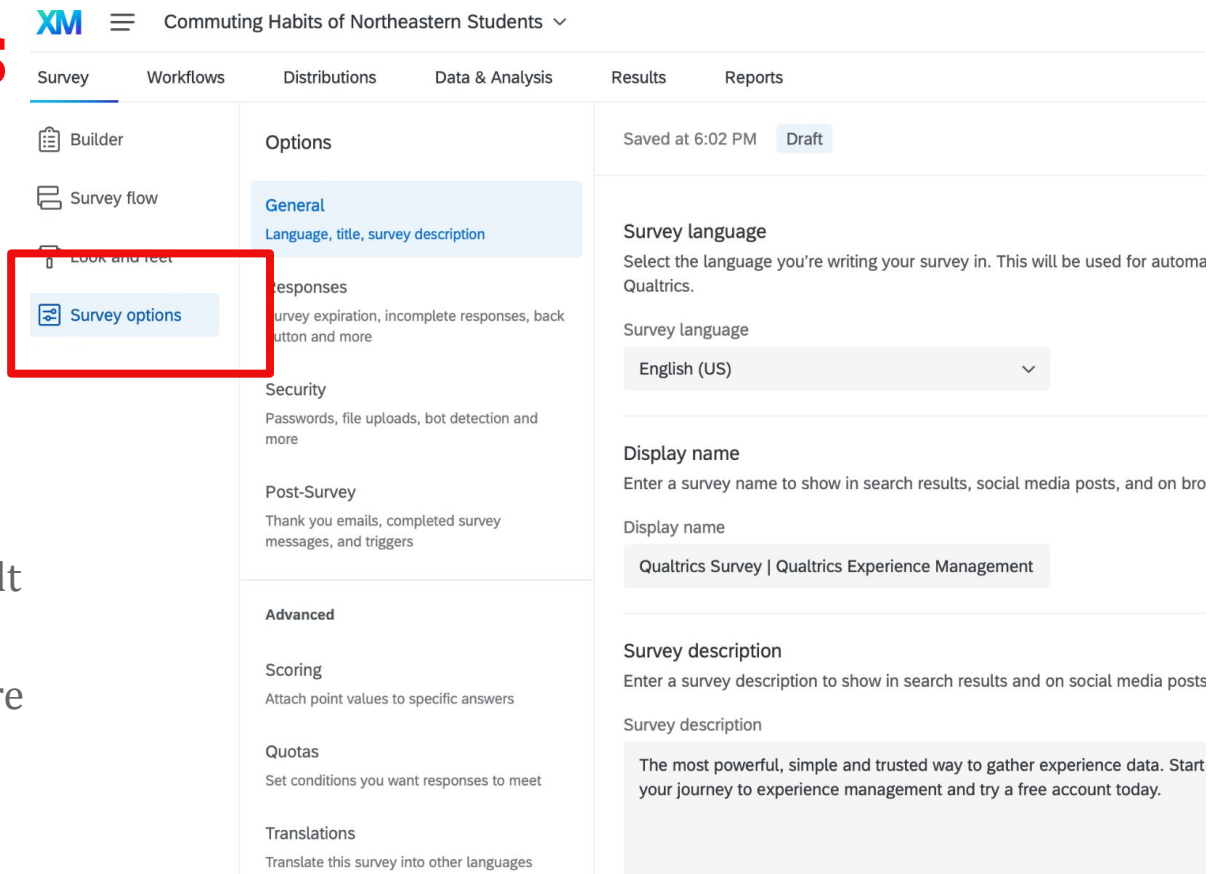


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# Survey Options

- You are ready to run a survey!
- If you want to include advanced features, such as preventing multiple submissions ('ballot stuffing'), you can find them in Survey Options. Note: the default options that are already pre-programmed in Qualtrics are sufficient for most surveys.



XM Commuting Habits of Northeastern Students

Survey Workflows Distributions Data & Analysis Results Reports

Builder Survey flow Look and feel **Survey options**

Options

General  
Language, title, survey description

Responses  
Survey expiration, incomplete responses, back button and more

Security  
Passwords, file uploads, bot detection and more

Post-Survey  
Thank you emails, completed survey messages, and triggers

Advanced

Scoring  
Attach point values to specific answers

Quotas  
Set conditions you want responses to meet

Translations  
Translate this survey into other languages

Saved at 6:02 PM Draft

Survey language  
Select the language you're writing your survey in. This will be used for automatic Qualtrics.

Survey language  
English (US)

Display name  
Enter a survey name to show in search results, social media posts, and on brochures.

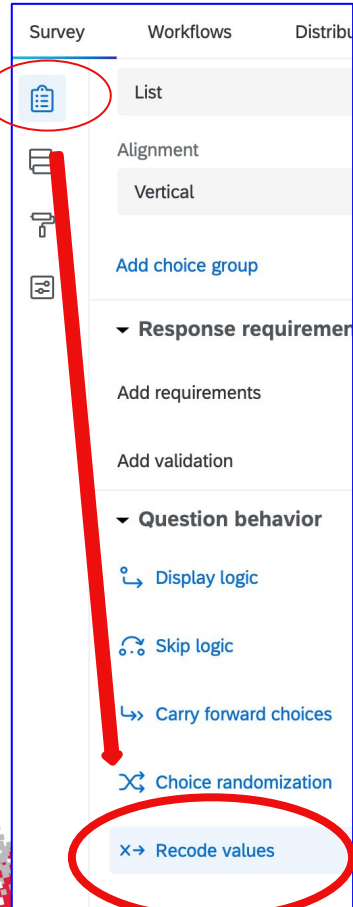
Display name  
Qualtrics Survey | Qualtrics Experience Management

Survey description  
Enter a survey description to show in search results and on social media posts.

Survey description  
The most powerful, simple and trusted way to gather experience data. Start your journey to experience management and try a free account today.

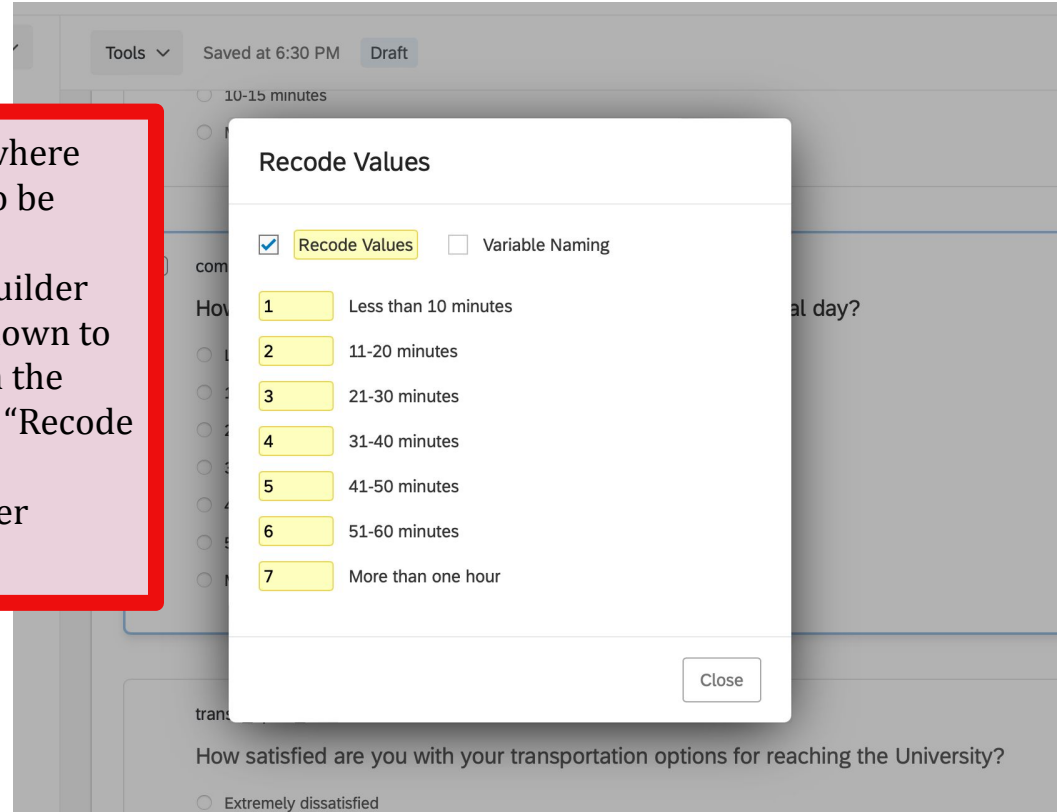


# Recode Your Answers



The screenshot shows the 'Survey' tab in the Survey Builder. A red circle highlights the 'List' icon in the left sidebar. A red arrow points from this icon to the 'Recode values' option in the 'Question behavior' section, which is also circled in red. Other options in the sidebar include 'Alignment' (Vertical), 'Add choice group', 'Response requirements' (Add requirements, Add validation), 'Question behavior' (Display logic, Skip logic, Carry forward choices, Choice randomization, and Recode values).

Click on the question where answer choices need to be recoded (typically to numbers). In Survey Builder tab, scroll all the way down to "X→ Recode values". In the pop-up window, check "Recode Values" box and assign numbers to each answer choice.



The 'Recode Values' pop-up window is shown. It has a 'Tools' dropdown, 'Saved at 6:30 PM', and 'Draft' status. The 'Recode Values' checkbox is checked, and the 'Variable Naming' checkbox is unchecked. Below, there are seven rows for assigning values to answer choices. The first row is highlighted in yellow.

Value	Answer Choice
1	Less than 10 minutes
2	11-20 minutes
3	21-30 minutes
4	31-40 minutes
5	41-50 minutes
6	51-60 minutes
7	More than one hour

A 'Close' button is at the bottom right.

Western University

Software for Texts, Maps, and Networks

*Feel free to ask questions at any point during the presentation!*

# Collaborating in Qualtrics

The screenshot shows the Qualtrics web interface. At the top, there's a navigation bar with the XM logo, a hamburger menu, and 'Untitled project'. Below this are tabs for Survey, Workflows, Distributions, Data & Analysis, Results, and Reports. On the left, the 'Edit question' sidebar is visible, showing 'Question type' as 'Multiple choice' and 'Answer type' as 'Allow one answer'. The main area shows a question block with a text input field and three choice buttons. A red box highlights the 'Tools' icon in the top left of the question block, with a red arrow pointing to the 'Collaborate' option in the dropdown menu. A text box with a red border and arrow points to the 'Collaborate' option, stating: 'Step 1. Click on the “Tools” icon. Then select Collaborate.'

XM    Untitled project    ?    Y

Survey    Workflows    Distributions    Data & Analysis    Results    Reports

Tools    Auto-number questions    Reset recode values    Manage reusable choices    Generate test responses    Review    Collaborate    Versions    Import/Export

Step 1. Click on the “Tools” icon. Then select Collaborate.

the question text

Choice 1    Choice 2    Choice 3

Import from library    Add new question

Add Block

# Collaborating in Qualtrics

The screenshot shows the 'Collaborate on Project' interface in Qualtrics. At the top, there are tabs for 'Distributions', 'Data & Analysis', 'Results', and 'Reports'. Below the tabs, the title 'Collaborate on Project:' is followed by a redacted black box. A red arrow points from the 'Add' button to the 'User and Group Address Book' link. Another red arrow points from the 'Details' checkboxes to a callout box. The callout box contains the text: 'If you want them to have full access to the survey design (editing, copying, etc), make sure you check these boxes.' The interface includes a search bar 'Type Username or Email...', an 'Add' button, and a table with columns: User, Edit, View Reports, Activate/Deactivate, Copy, and Distribute. The first row shows a redacted user name and five checked 'Details' boxes. At the bottom right, there are 'Cancel' and 'Save' buttons.

Collaborate on Project: [Redacted]

Type Username or Email... Add [User and Group Address Book](#)

User Edit View Reports Activate/Deactivate Copy Distribute

[Redacted] ☒ Details ☒ Details ☒ ☒ ☒

Cancel Save

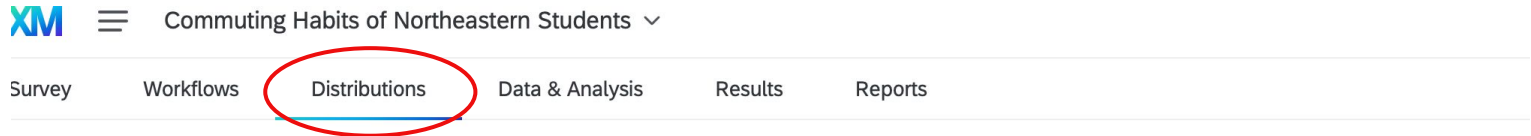
**Step 2. Type the names of your project collaborators and click "Add".**

If you want them to have full access to the survey design (editing, copying, etc), make sure you check these boxes.

*Feel free to ask questions at any point during the presentation!*

# Survey Distribution

- Once the survey is ready, there are multiple ways in which you can distribute it, including web-links and QR codes.



**Go to Distributions and select the method you prefer.**

How do you want to distribute your survey?



Email



Web



Social



Mobile



Online panel

Send with Qualtrics

 Compose Email

Use your own email system

 Get a single reusable link

 Generate a trackable link for each contact

Nor

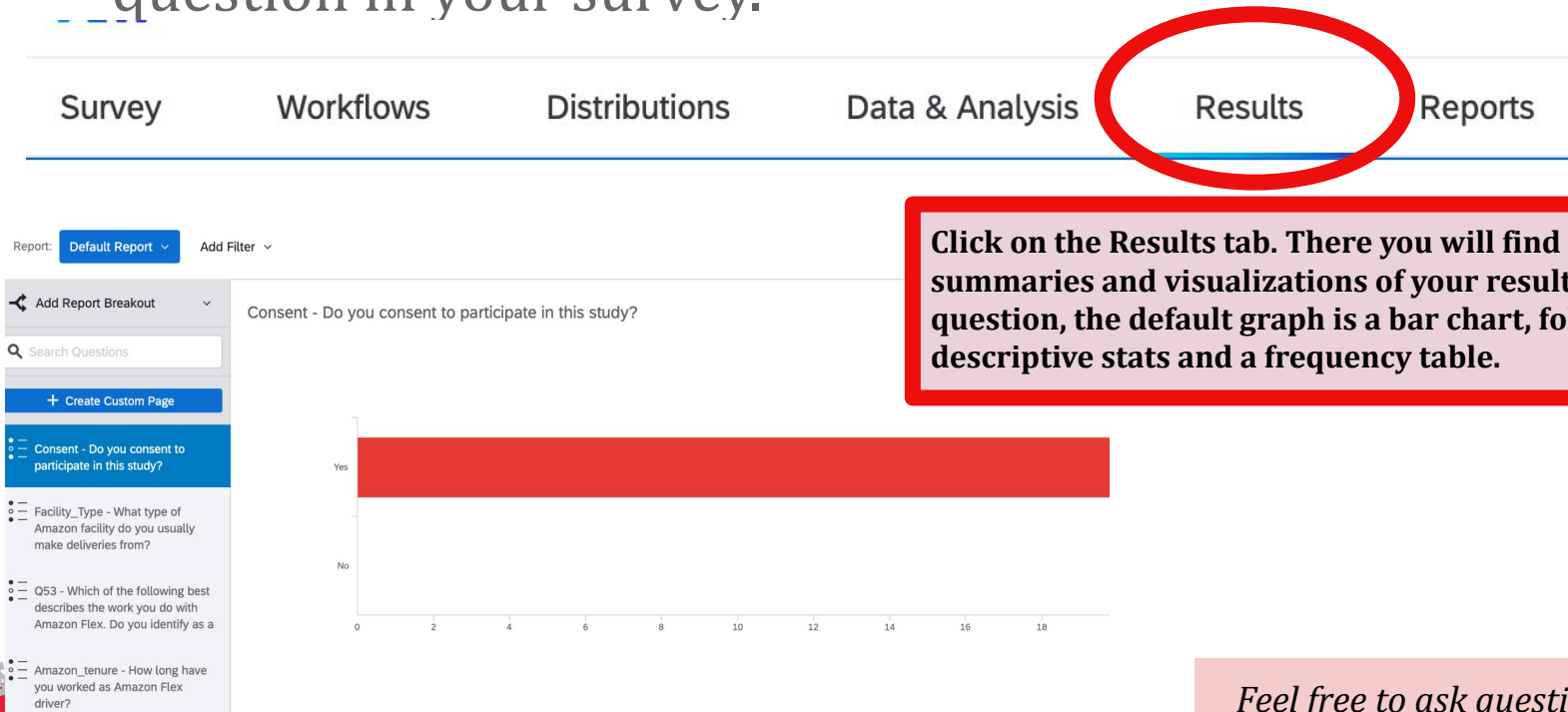
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during the presentation!

print

# Analyzing the Results

- The Results tab shows you the basic statistics for each question in your survey.



**Click on the Results tab. There you will find quick summaries and visualizations of your results. For each question, the default graph is a bar chart, followed by descriptive stats and a frequency table.**

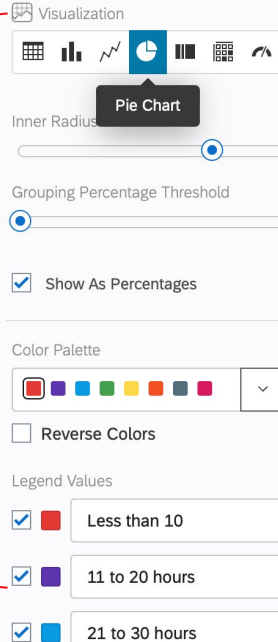
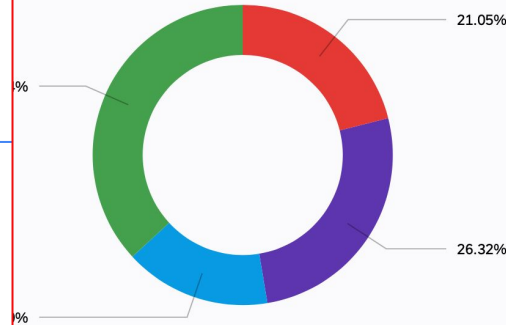
*Feel free to ask questions at any point during the presentation!*

# Analyzing the Results

Click “Add Visualization”

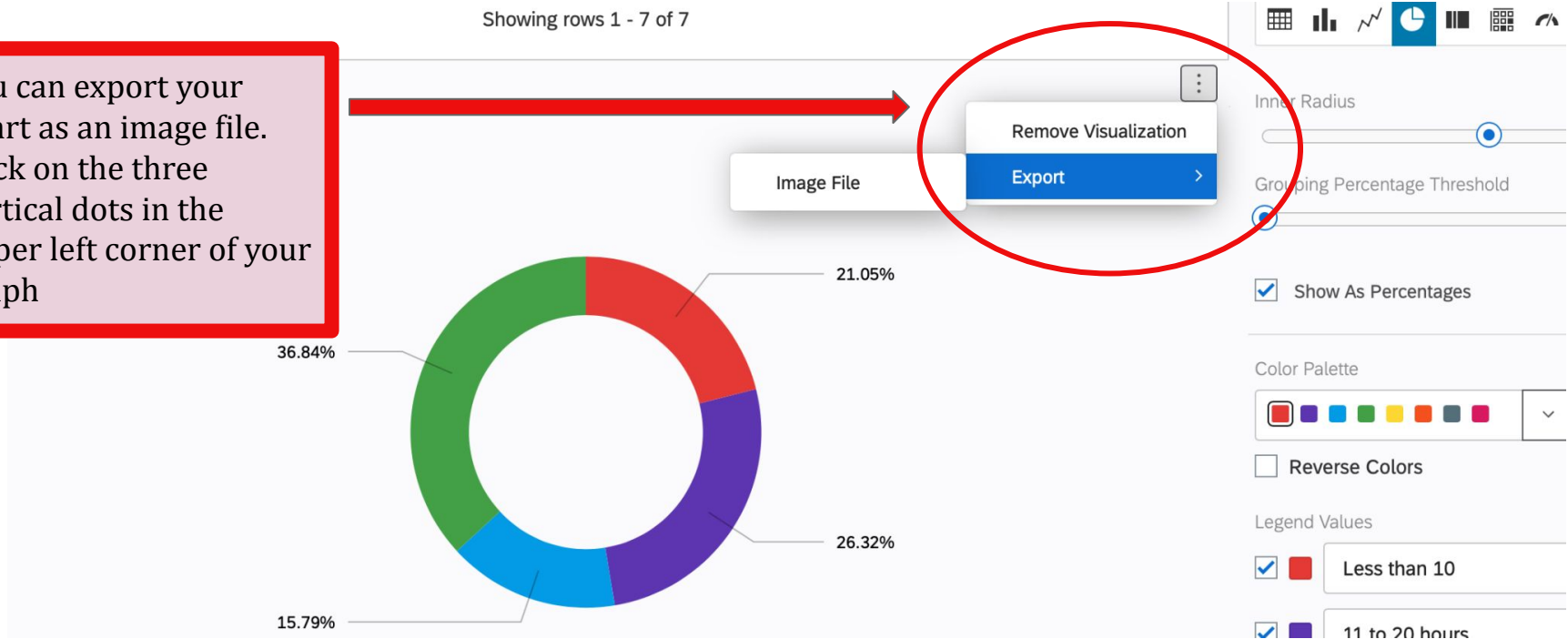
Additional visualization options will appear on the left side. You can change the chart type, color codes, and many other features.

+ Add Note + Add Visualization



# Analyzing and Exporting the Results

You can export your chart as an image file. Click on the three vertical dots in the upper left corner of your graph





# Export Your Results

Workflows Distributions **Data & Analysis** Results Reports

Crosstabs Weighting

Last Record Collected: Never Inactive

## Download a data table

CSV TSV **Excel** XML SPSS Google Drive User-submitted files



### Excel

Export your data as an XLSX file - an Excel-compatible format. If you have a very large number of responses, use TSV instead.

[Learn more](#)

- ☒ Download all fields
- ☒ Use numeric values
- ☐ Use choice text

[More options](#)

Close

[Download](#)

[Export & Import](#)

[Export Data...](#)

[Import Data...](#)

[Response Export Automation...](#)

In “Data & Analysis”, click “Export & Import”. In the window that will pop up, choose the file type you want to work with. If you recoded the answers to numbers and want to download the survey with only numeric values, mark the appropriate field .

*Feel free to ask questions at any point during the presentation!*

# Thank you!

If you have any questions, contact us at:

[nulab.info@gmail.com](mailto:nulab.info@gmail.com)

Slides, handouts, and data available at  
<https://bit.ly/diti-sp22-brown-qualtrics>

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