

## ADVANCED TECHNIQUES

How to get the most out of using a high-powered online survey service

*Prepared by consultants at demographix.com – online surveys made easy!*

### 1. How to calculate averages

If the answers to a question are either numbers or ranges of numbers, demographix can automatically calculate the average value from responses to that question. To do this, follow each answer option with an equals sign (no spaces) and then a value. If the options are ranges, the value should represent the median of the range.

**For example:** For the range 500-1000, the midway value is 750, so you'd put 500 – 1000=750. When demographix displays the answer, it will not show anything after the "=" sign. Also note that the value after the equals sign should be a numeric value only (use 50000 rather than £50,000). Here is a simple question showing how this can be used:

How old are you?

16 to 24=20

25 to 34=29.5

35 to 44=39.5

45 to 54=49.5

55 to 64=59.5

65 or over=69.5

Be sure to tick the box which says "Calculate average results (place equals sign and numeric value after each option above)". If you don't, all the text after the equals sign will be displayed to respondents.

### 2. How to use keyword analysis

When you have a write-in question, offering users a freeform response, you can amass many thousands of responses, which demographix allows you to view as a list. Scanning through this list you will often find recurrent words (for example, asking for the Best Movie of All Time? is likely to get a few responses for The Godfather and Lord of the Rings). The demographix system allows you to analyse keywords by putting common responses in the Keyword Analysis box. You can use several keywords on one line, and demographix will count all the terms using these. You can also use parts of words. Remember to separate each keyword collection by a line return.

**For example:** For the question above, we might anticipate that some of the following well-known movies might appear in our write-in results:

Godfather

Lord, Rings, Fellowship, Return, King, Two, Towers

Harry, Potter

Wild, Strawberries, Smultronstallet

In these examples, all writ-ins with "Godfather" included will be counted (so this will cover "The Godfather" or "Godfather Trilogy" or "The Godfather Part 3". Similarly, a film title in English and its native language (in this case, Swedish) will be counted.

### 3. How to use matrix questions

Matrix questions are very powerful, but can also be used in such a way as to be difficult to respond to. A matrix involves a main question with a series of sub-questions displayed vertically at the left beneath it, and a shared set of answer options. The answers can be displayed as a row of single choice (radio buttons) options or multiple choice (checkbox) options or as a drop-down menu. When you have a large set of questions and many response options (eg a scale of 1-10), then it is often best to use the dropdown option.

**To create a matrix question:** Click on "Other Styles" in the "Item Type" menu, then select from the three matrix options in the "Select a Style" dropdown menu to the right. You will need to enter the shared question, then a list of left-hand options, then the list of possible answers to it.

**For example:** You could use either a matrix (radio) or matrix (dropdown) style for this question:

How do you rate these cities as holiday destinations?

*Left-hand options:*

*Right-hand options:*

London

Fantastic

New York

OK

Paris

Boring

Rome

Never Been

### 4. Using graphics in surveys

Demographix allows you to use graphics as a means of customising the appearance of a survey (using logos as page headers, or as background images), and within survey questions themselves (giving a series of images to choose from). However, use graphics with care – not all of your respondents will have broadband or high-speed access, and this can slow down the survey. Demographix has an advanced facility that lets you resize graphics you upload and save the new size for inclusion in a survey.

**a. How to upload an image:** Click on the "Images" option in Account Functions, and then on the "Upload" tab. Click the "Browse" button to find the file you want to use on your computer. You can upload JPG and GIF files. Select the file you want, add a description of it for later reference, and then click the Upload button.

**b. How to categorise and edit an image:** Click on the "Images" option in Account Functions, and then on the "Images" tab. The drop-down menus show what categories you have created, and what images have been assigned to these categories. To categorise an image, select it, and then choose the "Assign to Categories" option. If there is not a suitable category already created, you can create a new one by ticking the "New Category" option. To edit an image, select it and then choose the "Edit Image" action. A pop-up will display the Demographix Image Editor, which has a handy sliding scale tool that allows easy resizing of images. As you resize, the image's properties are recalculated (so, for instance, you can see how long it will take to download the image). When you've decided on the new size, press the Continue button, and the Save option.

**c. How to use image questions:** Demographix allows you to create questions using images as answers, whether they are single or multiple choice questions. The options "Horizontal Images" and "Vertical Images" are available in the second drop-down menu when selecting your question style. Add the images you want as optional answers. Demographix will automatically display the image description beneath it, but you can change this by selecting the image and clicking the Edit button. Note that the text you enter will be displayed next to this image only for this particular question.

**d. How to use images as page headers:** If you wish to use a logo or other image as a page header, click on the "Appearance" option in the Survey Functions, and then the Page Header tab. Here you can select an image, assign it by clicking "Use this image", specify alignment (left aligned, centred or right-aligned), and see what it will look like by clicking the "Pop-up Sample" button.

**e. How to use images as background:** If you wish to use a logo or other image as a background, click on the "Appearance" option in the Survey Functions, and then the Background tab. Here you can select an image, assign it by clicking "Use this image", specify recurrence (tiled, no repeat, vertical repeat or horizontal repeat), and see what it will look like by clicking the "Pop-up Sample" button.

## 5. Using compulsory and validated questions

Demographix allows you to validate answers that respondents give – to check, for instance, that a request for an email address or post code/ZIP code fulfils standard criteria. Every question has a Validation tab to select this option. If you tick the Compulsory question option, demographix will not allow the respondent to move to the next survey page or submit a survey without answering this question.

**Special Note:** Be careful to ensure that you don't make a compulsory question the result of a conditional option. If a respondent does not choose the option that leads to the conditional question, they will not see the compulsory question, and will not be able to complete the questionnaire.

## 6. Using opt-ins and opt-outs

One of the most frequently asked questions about market surveys is what the difference is between opt-ins and opt-outs. These buzzwords refer to the practice of asking respondents to agree to a proposition (opt-in) or give them the opportunity to exempt themselves from subsequent events (opt-out). They are often used to gain consent for further contact.

**For example:** Consider the difference between these two statements:

- a. If you would you like to receive further invitations to similar surveys from us in future, please enter your email address here (opt-in)
- b. Tick this box if you do not wish to receive special offers from our trusted business partners in future (opt-out)

## 7. How to use the Scrapbook and create templates

If you are doing regular surveys that include a few of the same questions, you can use the Scrapbook to make copies of questions that can then be pasted into other surveys. Two options appear under the "Other" tab for all questions in a survey – "Move question to scrapbook" and "Copy question to scrapbook".

Click on the "Scrapbook" option in the Account Functions menu to see what questions are currently in the Scrapbook. For each question in the Scrapbook you have options to Edit or Delete them. To insert a question from the Scrapbook, use the links that appear automatically in the workspace of your survey.

When you have many questions that you reuse in surveys (such as a page of questions to harvest demographic data), it's often a good idea to create a survey template. Simply create a survey with all your template features and give it a title such as "Business Template". Then choose the "Duplicate Survey" option beneath it when you want to create a new survey that includes all those questions. Remember, if you have colleagues who have Creator status, you will need to give them access to the template survey (see the Administration FAQs document for further details).

## 8. How to apply a standard style across different surveys

Demographix allows you to alter the appearance of a survey in many ways – selecting different coloured backgrounds, using different fonts, sizes and colours, changing the spacing above and below lines of text. Once you have created a style for a particular survey, it's easy to apply that same style to your current survey. Simply click on the "Appearance" option in the Survey Functions menu, select the Options tab, and then choose the style from the previous survey to apply to the current one.

## 9. Work backwards from a prototype report

This is a simple tip – but a powerful one. When designing a survey, it helps to know what you're aiming for. Write down the answers to questions you want, or sketch out the kind of prototype report you want to prepare once you have harvested your information. Then work backwards from this, asking yourself what questions you will

need to get those results. This will often have the added benefit of simplifying your survey – allowing you to jettison unnecessary questions. A streamlined survey always gets better results, by increasing response levels.

## **10. Build up a library of searchable data**

For serious researchers, demographix offers you the ability to build up a library of searchable research that is available for future reference. If you want to re-visit how respondents replied to a question a few years back, use our powerful search mechanism to locate the question and give access to the results. Or maybe you want to use the same question to one you used a couple of months ago, to ensure consistency in your research approach. Use our search to easily locate the question, then copy it to the Scrapbook to reuse it in a new survey. Building up a library of research data is one of our most innovative features, and something we offer at no extra cost to you.

## **11. Enable respondents to Invite a Friend to fill out a survey**

"Invite a Friend" is an option which can be set for a survey. With this enabled, after a survey has been completed the respondent is invited to enter details of up to three friends or colleagues to invite by email to complete the survey as well. These friends receive an email sent by demographix on behalf of the respondent with a personal message from them (if one was added). The survey URL in the email is tagged so that you can track the number of emails sent and how many of the recipients completed the survey. It is also possible to filter by this source of responses. To turn this feature on, click on the Survey Properties and then select the Details tab. Under the "URL of page to display when survey has been submitted" section, tick the box labelled "Show "Invite a friend" page first". A "Preview" button will then appear which will show you what the Invite a Friend page will look like. This will be displayed to respondents before they are redirected, after they submit their survey.

## **12. Use conditional routing after a survey is completed**

The web page a respondent is sent to after they have completed a survey (and optionally been shown the "Invite a friend" page) can be determined by their answer to a question in the survey.

**Example 1:** If someone says they want more information they can be sent directly to a sign-up form on your website. People who don't want more information can be sent to your home page.

**Example 2:** You can also use this function to link and branch to surveys. Create an initial survey which asks, for example, whether the respondent is male or female. When they have completed this survey they can then be taken to the appropriate follow-on survey.

To avoid conflicting options, the control question has to be a single choice (or single image choice) question. You need only ensure that you have a default redirection page and then add additional URLs for any answer options which should be treated differently. To access this feature, click on the Survey Properties and then select the Details tab. Under the "URL of page to display when survey has been submitted"

section, choose the "Based on answer" option. A pull down menu will then appear so that you can choose your control question and enter the URLs appropriate to each answer.

**There are lots more tips on building and analysing surveys using the high-powered demographix service. Click on the Helpdesk option on the bottom left-hand corner of the workspace to access our library of help files.**