Using Surveys

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You can create and send out an unlimited number of surveys in EventsAir.

- Surveys can be used to gauge interest in different topics, to get post-conference feedback, or to add value with industry insights. Session Surveys can be added to your sessions, and a special type of survey can be used to create a Meeting Hub profile.
- You can create as many questions as you need, configured in different ways or for different audiences, and send them out to very specific groups.
- Different question types include multiple choice (select one or more than one), yes or no, multi-point scales, check box, rank order and open-end queries. You can even include "upload document" as a question type.
- You can administer your survey like a questionnaire, where each individual can only respond once and their responses will be attached to their contact record. However, there's also another method where you can create a default user name for (almost) anonymized results. (See the section below about sending out surveys.)
- Once surveys have been completed, you can use a variety of tools and analytics to interpret the results and export the data into Excel spreadsheets for further analysis.

Surveys can gather some quite personal information so be sure you're across the relevant rules about data protection and privacy and give respondents necessary information on your survey site.
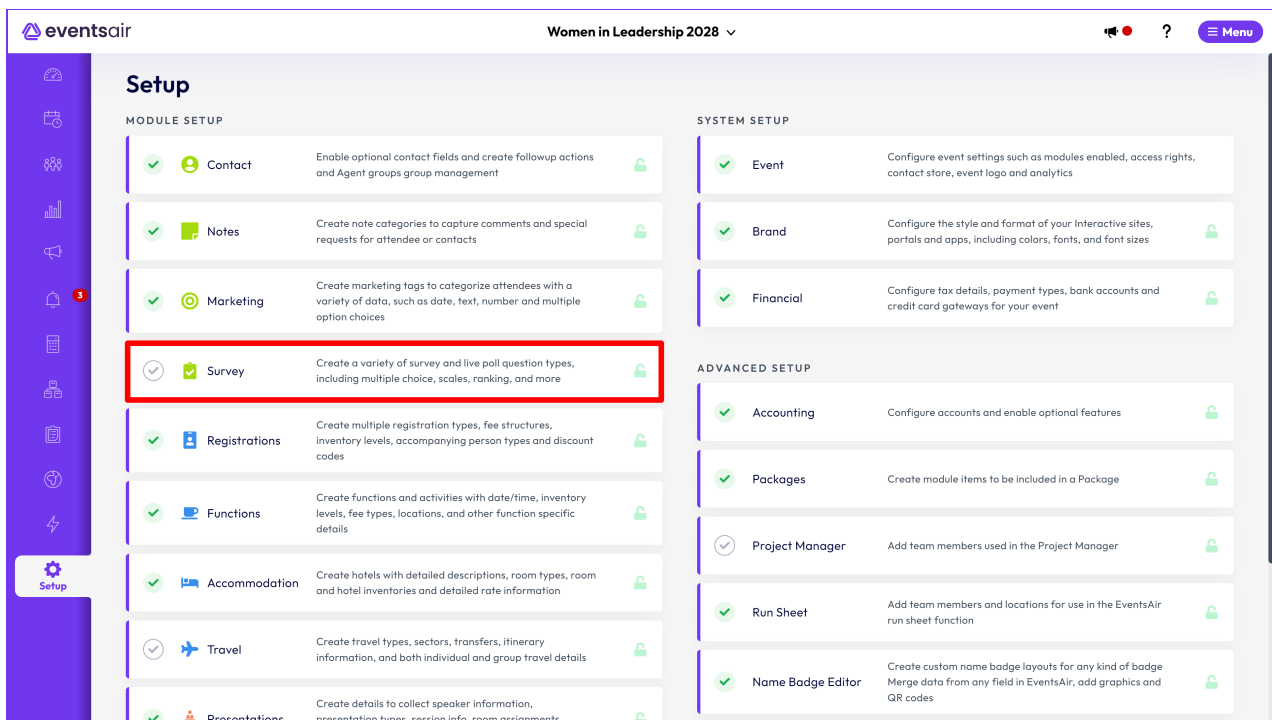
REMEMBER:

- The **Setup Panel** is where you set up all your possible survey **questions**.
- **The Communications Panel** is usually where you **build surveys, send them out**, and **review results**.

  You can also add a Session Survey to your Sessions, under Presentations (Setup Panel).

Setting up survey categories and questions

In the **Setup Panel**, choose **Survey**.

Once you're in **Survey,** look in **Preferences,** where you can enable the **Question Category** box (optional). Creating categories lets you group similar questions together to make them easier to find when building a survey. After you enable this in Preferences and Save, you'll see "Question Categories" in the left-hand menu.
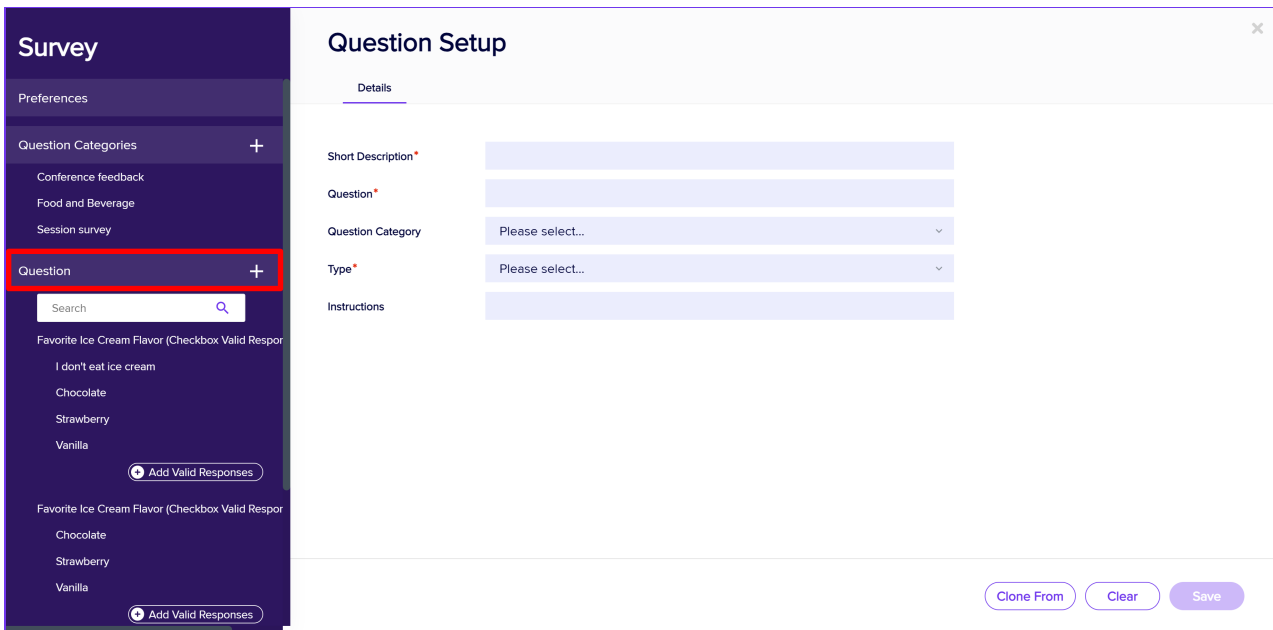
Optional — Set up question categories

To add a Question Category, click the + icon. You could set categories such as Food & Beverage, Presentations). Alternatively, you could categories about your attendees such as Company Information or Previous Attendance.

You may have separate categories for Session Survey questions.

Write survey questions

This is where you create the actual questions that you can later choose to appear in your surveys. This is also where you define the valid responses, where applicable. (You don't need to do this for yes/no, true/false, agree/disagree scales or rating questions; only where you want to write your own multiple-choice responses).

To create a question, click the + symbol next to Question.

Fill in the following:

- **Short Description** — this is just the title for your reference, when building surveys.

- **Question** – the actual question, e.g. "What's your favorite color?"

- **Category** – if you've set up question categories, you can select one here. This is optional — it just makes it easier to find questions when building a survey.

- **Type** – select the type of question from this drop-down list.

If you're not sure which question type to choose, see the section later in this article about how each of these appears to your survey respondents.

- **Checkbox** Valid Response

- **Checkbox** Valid Response with "Other" Option

- **Date**

- **Dropdown box** 4 options (Agree Disagree, 4 options)

- **Dropdown box** 5 options (Agree Disagree, 5 options)

- **Dropdown Box** Rating 1-5

- **Dropdown Box** True/False

- **Dropdown Box** with Valid Responses specified

- **Dropdown Box** Yes/No

- **Number**

- **Radio Buttons** 4 options (Agree Disagree, 4 options)

- **Radio Buttons** 5 options (Agree Disagree, 5 options)

- **Radio Buttons** Rating 1-5

- **Radio Buttons** True/False

- **Radio Buttons** with Valid Responses specified

- **Radio Buttons** with Valid Responses specified and "Other" option

- **Radio Buttons** Yes/No

- **Text** Multi Line

- **Text** Single Line

- **Upload Document**

- **Instructions** — You can add any specific question instructions here. Text you put here will appear under the question (above the responses).

> *To add text that only shows when people click an "information" icon next to the question, use the "Help text" field in the survey builder itself (see later section in this article).*

Define valid responses where needed

For some questions, you need to add valid responses/possible answers. In the left-hand panel, you'll see the "+Add Valid Responses" button underneath these questions, and you can keep adding responses by selecting this button.

(You're not prompted to do this for any questions where responses are already set: Yes/No, True/False, Agree/Disagree scales, ratings 1–5, etc.)

For each response added, you can nominate a **Sort Order** (the order in which the responses will appear to an attendee) by adding a number in the **Sort Order** field. Leave it as zero if the answers can appear in the order in which you created them.

Cloning surveys and questions

- You can clone a **category** but this isn't really needed. It will only clone the name of the category (not any questions you may have put into that category).

- You can clone **multiple questions** from another survey: this is an easy and quick way to clone a whole survey from either the same event, or another event. Select "Clone from" while creating a question to choose an event and the question(s) you want to clone.

- Cloning a question or multiple questions also copies the valid responses. You can edit these and all other fields in cloned questions **EXCEPT the question type**.

When you clone a question (or multiple questions) from the same event, you must give it a new name.

> *Every time you write new questions and responses, these are added to the list of possible questions shown in the left-hand menu. Questions with lists of valid responses will be grouped together at the top, and other question types will be listed below that. When you come to build your surveys, you can add questions in any order and move them around using the drag-and-drop builder.*

Deleting or editing questions (in setup)

- **If you want to delete a question from here**, you'll need to delete any valid responses you've created for that question first. (Otherwise, you can just delete it.)

- **If you want to edit a question after it's been added to survey**, any changes you make here will only take effect (appear in the survey builder and in the survey itself) after you go back into the survey builder and re-save. Read more about the survey builder, read the section below.

Building, sending and managing surveys

Once you've created your survey questions (and responses) in the Setup Panel, you can go to the **Communications Panel** to build surveys, send them out, and review responses.

- The **Surveys** section (bottom left) is where you build a survey, using the questions you've previously written. You can also amend/delete an existing survey.
- Later, you'll use the **Manage Surveys** Quick Action button on the right, (clipboard icon with tick), to see and analyze responses.
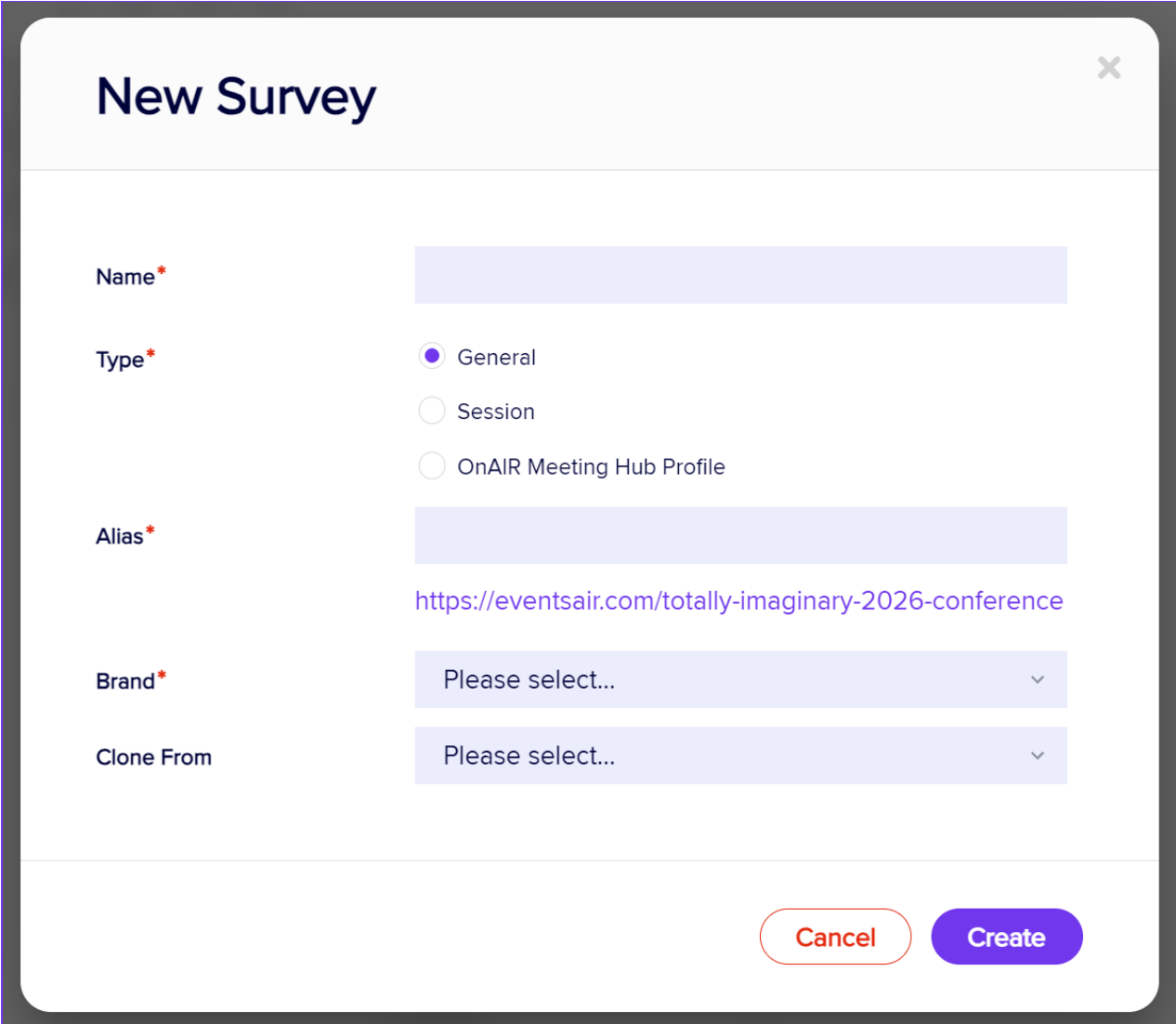

There are different ways to send your survey out — see information later in this article.

Build a survey

Your event can include multiple surveys, configured in different ways. To build a survey:

In the **Communications Panel,** in the section headed **SURVEYS,** (see screenshot above), click the **New** button.

This will open up the following screen:

Here's where you set the following details:

- **Name** — name your new survey.
- **Type** — choose either:
  - **General** – for collecting general survey responses.
  - **Session** – for collecting survey responses for a specific session or workshop. See tip below.
  - **OnAIR Meeting Hub Profile** — responses will go into the attendee's Meeting Hub profile. [Not all Question Types are available when building Meeting Hub profile surveys.]

- **Alias** – enter any particular text you want attendees to see in the URL for this survey.
- **Brand** – select the brand for this survey.
- **Clone From** – copy a previous survey to use as a starting point for your new survey.

  You cannot clone a survey of a different type (e.g., if you're creating a Session Survey, you can't clone it from a General Survey. Even if this appears to be successful at first, it won't save).

The first few components you may want to add (apart from a heading and some introductory text) are:

- **Opt-Out** — You may want to give people the chance to opt out of responding to the survey. This opt-out status will be shown in the attendee's record.
- **Sign-in Page** – this requires either a new sign-in, or returning sign-in from someone who's previously started the survey. You can also allow attendees to register using their Facebook or Twitter accounts.
- **Contact** – define which contact fields will be displayed. You can mark mandatory fields as "Required", and also edit the label text, help text, and default values.

Choose which questions to include

On the left side of the page, you'll see:

- **Category** — (if you created categories during the Setup — see earlier section). Choose a category to see all questions in that category.

- **Question Bank** – all available questions (based on your category choice) will appear on the left, and you can drag them into the survey. See more information below about how each question type looks and other options you can add.

- **Other builder Components** – you can also add elements such as:
  - **Heading** — **you can include headings for each section or page, for example**
  - **Text** — you can add some information before a section or particular question
  - **HTML** – custom content that's HTML formatted
  - **Image** — images can also form the basis of a question
  - **Page Break** – useful for breaking up your survey into multiple pages
  - **Captcha** — useful if you want to block any bots attempting to access your survey
  - **Submit** — you can alter the text to appear on the Submit button
  - **Thank You** – write a thank you message for attendees to see after they submit their responses.

Select the **Save & Preview** button to see your survey.

You can also select **Save** at any point and return to edit the survey later.

Adding extra options to questions

When you drag-and-drop questions into your survey, it will look a little like this in the builder:
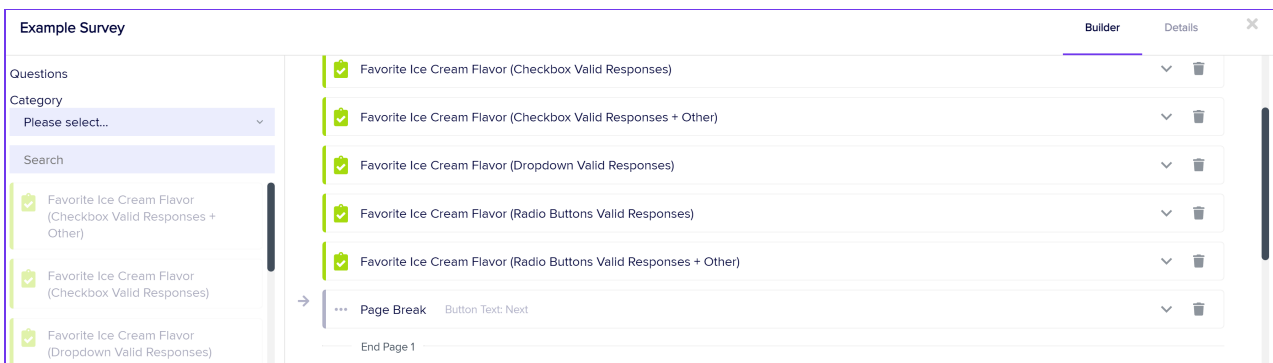
Using the arrow to expand a question lets you add other options or information:

✅ Favorite Ice Cream Flavor (Radio Buttons Valid Responses + Other)	⌃ 🗑
Name	Favorite Ice Cream Flavor (Radio Buttons Valid Responses + Other)
Question	What is [are] your favorite ice cream flavor[s]?
Category	Food and Beverage
Instructions	QUESTION TYPE: Radio Buttons Valid Responses + Other [Instructions may include 'Can select only one' / Consider including the Additional Feedback box].
Valid Responses	I don't like ice cream, Chocolate, Strawberry, Vanilla
Mandatory	☐
Additional Feedback	☐
Help Text	

Everything you entered when you created the question (in Setup panel) will be visible here:

Name, Question, Category, Instructions and **Valid Responses.**

However, you **cannot** edit these from the builder. Editing of these fields can only be done back in the Setup panel.

Here in the builder, you also have options for each question:

Mandatory:

If this box is ticked, the question will have an asterisk beside it in the survey. The respondent won't be able to move to the next page/submit without having answered. (A prompt appears at the top of the survey page if they attempt to do this.)

Additional Feedback:

If you tick this, it will insert a text box below the question where the survey respondent can add other information, give comments etc. It's especially useful if your question includes an "Other" response, so they can add text. (Alternatively, if you want more details about an 'other' response, you can add a follow-up question, either single or multi-line text type, which says something like 'If you answered 'other' above, please give more detail here'.)

Help Text:

If you add text to this field, an "information" icon will appear at the end of the question, and when clicked will show this text. Generally it's easier to use 'instructions' for this purpose but there may be a reason you need both.

Editing or deleting a survey

You can come back to the builder to **edit** a survey, even if it's live and people have already responded (this will skew your results).
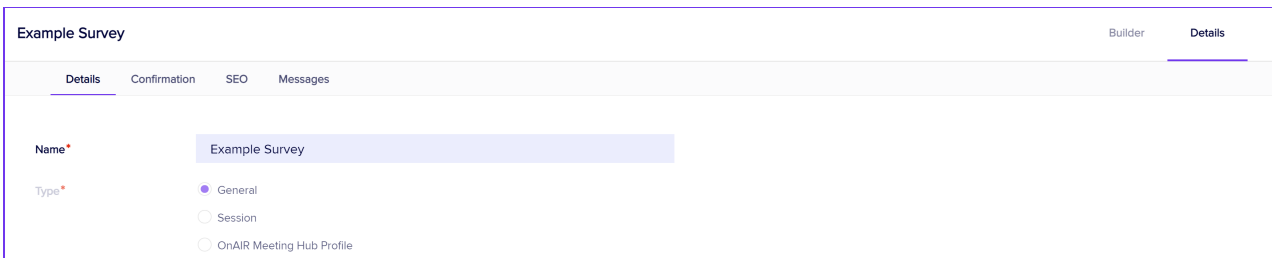
You can only **delete** your survey if nobody has submitted responses. This is to prevent you from accidentally deleting responses. If there are responses but you're **absolutely sure do not need the data from the survey** , you can delete all responses and then delete the survey. **This action can't be undone.**

Check Survey Details

After building your survey, you can click on the **Details Tab** to adjust other settings if needed:

- **Details**
- **Confirmation**
- **SEO** (Search Engine Optimization)
- **Messages**

(You won't see these options for a Meeting Hub profile survey.)

Example Survey				Builder	**Details**
Details Confirmation SEO Messages					

Name* Example Survey

Type* ● General
        ○ Session
        ○ OnAIR Meeting Hub Profile

Some of these details will already be filled in based on what you entered when you created the survey. Some can be amended but others can't.

Main details tab

- **Name** — you can edit the title of your survey.

- **Link & QR code** — see below.

- **Type** — you can see this but can't change it after the survey's been created.

- **Alias** — **if you change this, it will affect the URL.**

> **Survey Link and QR Code**
> A link and QR code are automatically generated for your survey. If you're going to send this 'general' link out, you must ensure your contact section includes first name, last name, and email address. It may be better to send a personalized auto-login token. See the section below about sending out surveys.

- **Brand** – you can edit the brand here, including adding a specific version of your brand that you've made just for the survey.

- **Availability** – designate whether the survey is Live, In Testing, or Closed. You can also set a date range when the survey will be visible.

- **Button Text** – lets you edit the default button labels.

- **Show Question Number** – check this box to display question numbers.

- **Optional Alert** – generates an alert whenever someone completes this survey.

- **Alert Level** – select the severity of the alert – Information, Low, Medium, High, or Critical.
- **Analytics View** – you can configure your survey to integrate with your Google Analytics account.

Confirmation tab

The Confirmation Tab lets you send a confirmation message (email, text) to anyone who completes the survey. This option works just the same way as for any interactive (registration) site. (You can choose the type of confirmation, what's included including any attachments, formatting, personalized data to be merged, etc.)

Search Engine Optimization & Messages

These work the same way as they do for any interactive (registration) site.
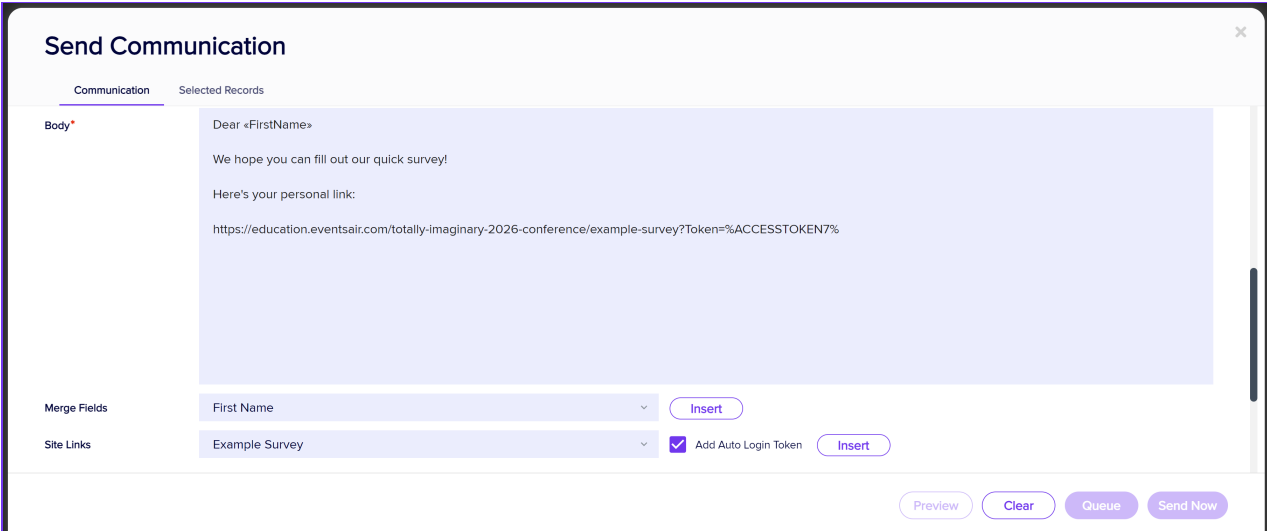
- In the SEO section, you can add metadata to improve your SEO (if you plan to make your survey public — be sure to review the information below about sending out surveys).
- In Messages, you can create the messages a site visitor will see if your survey is not yet open, if the survey has already closed, or if they've already responded to the survey.

Sending out surveys

Surveys are designed to be completed by each person only once, to avoid duplication of responses.

Usually, you want to send your survey to people who already have contact records, and the easiest way to do this is by sending **out the survey via personalized auto-login token. If you use this method, you don't need to have a contact component in your survey.**

Using either the Send Communication or Planned Communications tool, you add a personalized auto login token to your survey link, the same way you'd add an auto login token for a registration site link (see plain text email example below):

Using filtering tools, tag codes etc., you can send surveys to selected groups or only to those who haven't already responded, etc. (Refer to the Communications articles for more information on these tools).

Alternative method to auto-login: add a Contact component

You may want to post your survey on social media or publicize it in other ways. But trying to submit a survey via a general link (i.e. not a personalized auto login token) will result in an error message if there's no contact component in your survey. This is because there's no existing contact record to attach the responses to.

If you want **new** attendees to be able to create a contact record in your event as they complete the survey, (for example, so that you can then send them an email with information on how to register), add a Contact Component when building your survey. Be mindful of privacy and data protection laws and opt-out provisions if you choose this method. Also, take steps to ensure that duplicate records are not being created.

Creating a default contact record

You may want people to be able submit survey responses without these being linked to a specific attendee contact record. The results will be almost anonymous, however IP addresses are collected. In this scenario, you can use the following method:

Add a contact component to your survey builder, and ensure First Name, Last Name, and Email address are included (you probably want to delete everything else). These are the minimum inclusions to create a record.

Add Default Values for the First Name, Last Name and email address. In the example below, the first name is "Survey" and the Second Name is "Responder". We also added a generic email address as the default value and disabled the 'verify email' setting.
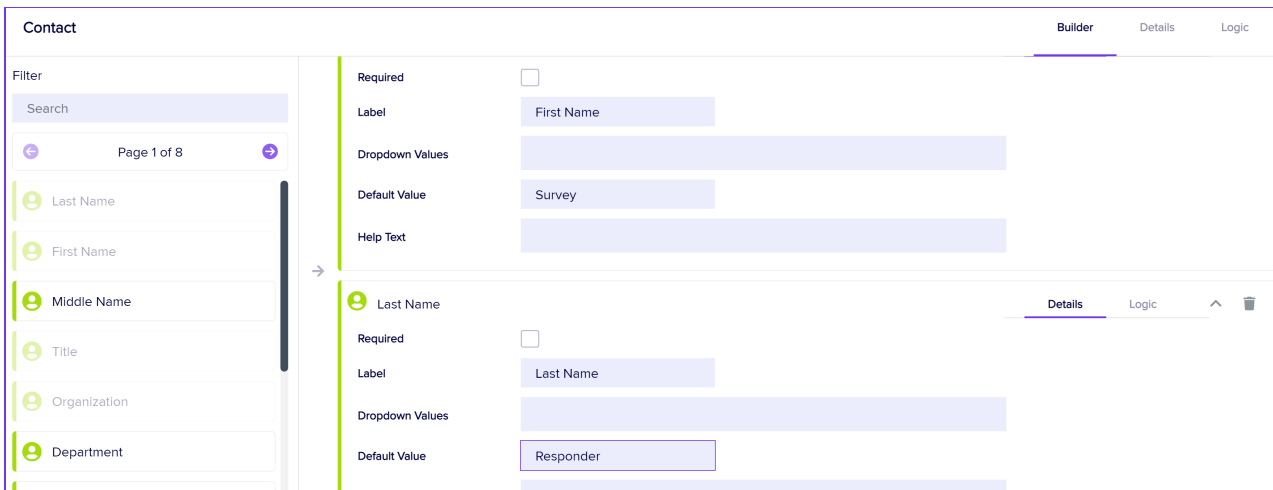
In the **Details tab for this Contact component**, for "Allow Data to be Edited", select "Not Editable After Initial Data Entry".
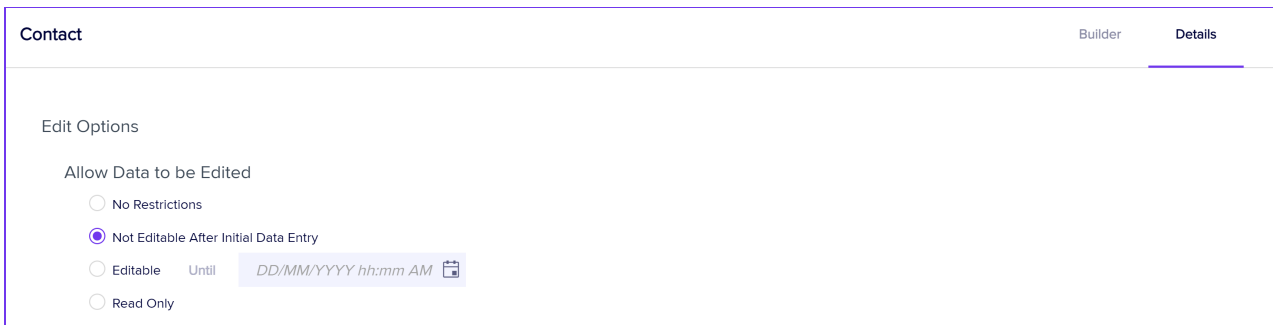
If you use this method, new record will be created for each person who responds, but the names will be "Survey Responder 1, Survey Responder 2" and so on.

In theory, you can analyze the data further to ensure that each IP address was only used once, but more likely you would just accept that it's possible some people did the survey more than once.

If you do use this method REMEMBER TO DELETE all these extra "attendees" from your event after you've downloaded the survey data, and don't include them in any headcounts etc.

See and analyze survey responses (Survey Manager)

To see and analyze survey responses, use the **Survey Manager** tool (the clipboard icon with a tick, on the right, in Quick Action buttons).

You can select which survey type you want to see data for: General Surveys, Session Surveys and Live Polling. There are four sections:

- **Responded Tab** – displays a list of all responses for the chosen survey (selected from the Survey dropdown option).

- **Opt Out Tab** — shows who opted out of responding to this survey.
- **Results Tab** — shows a list of survey results.

- **Graphs Tab** – displays all survey results as graphs and pie charts.

- **Raw Data Tab** – displays a list of all responses to all questions.

How questions look on the actual survey site

See below for an example of each question type, including some marked Mandatory, with the Additional Feedback box, or Help text added.

[Use the purple plus icon to see the dropdown image]

The Question Type has been included in the instructions so you can quickly identify them, but you wouldn't include this in your actual survey.

There are also some suggestions about how you might use each question type.

Checkbox Valid Response

Example also shows Information icon for help text

What is [are] your favorite ice cream flavor[s]? ℹ

QUESTION TYPE: Checkbox valid response [Instructions should include "Can select more than one"]

☐ **Chocolate**

☐ **Strawberry**

☐ **Vanilla**

Checkbox Valid Response with "Other" Option

What is [are] your favorite ice cream flavor[s]? *

QUESTION TYPE: Checkbox Valid Response + Other [Instructions should include "can select more than one". Consider including "Additional Feedback" box]

☐ **I don't eat ice cream**

☐ **Chocolate**

☐ **Strawberry**

☐ **Vanilla**

☐ **Other**

[   ]

Date

On what day would you like to be offered ice cream?

QUESTION TYPE: Date

| yyyy-mm-dd | 📅 |

⏮	◀	January 2024▾	▶	⏭

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Dropdown box 4 options (Agree Disagree, 4 options)

I really like ice cream

QUESTION TYPE: Dropdown Box 4 Options

Please select... ▲
Agree
Partly Agree
Partly Disagree
Disagree

Dropdown box 5 options (Agree Disagree, 5 options)

I like ice cream

QUESTION TYPE: Dropdown Box 5 Options

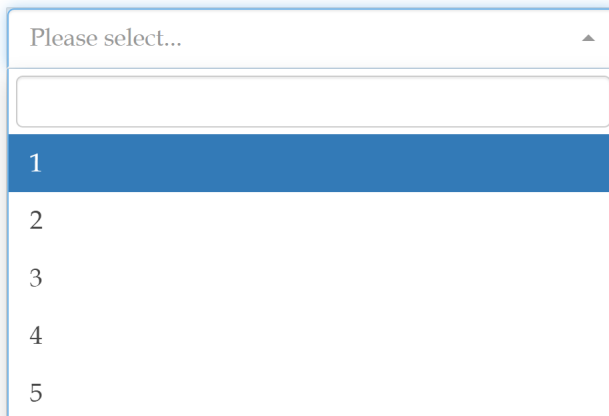| Please select... ▲ |
| --- |
| |
| **Agree** |
| Partly Agree |
| Neither Agree nor Disagree |
| Partly Disagree |
| Disagree |

Dropdown Box Rating 1–5

How much do you like ice cream?

QUESTION TYPE: Dropdown rating 1-5 (Tell people what the highest is in the instructions or help text, or the question - e.g. "Where 1 means you hate it, and 5 means you love it")

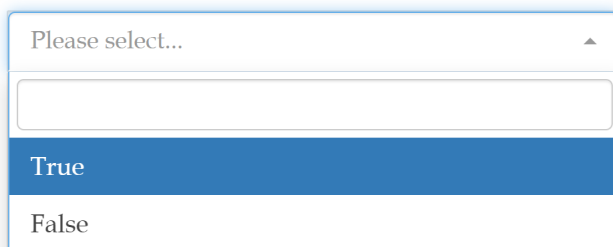Please select... ▲

1
2
3
4
5

Dropdown Box True/False

I'm a huge fan of ice cream

QUESTION TYPE - Dropdown box True/False

Please select... ▲

True
False

Dropdown Box with Valid Responses specified

What is your favorite ice cream flavor?

QUESTION TYPE: Dropdown with valid suggestions [Instructions may include 'can select only one']

Please select... ▲

[   ]

Ac | Chocolate

Strawberry

Vanilla

Dropdown Box Yes/No

Do you feel like eating ice cream right now?

QUESTION TYPE: Dropdown Box Yes/No

Please select... ▲

[   ]

Yes

No

Number

How many ice cream cones have you had this year?

QUESTION TYPE: Number [Use this question type for a specific number; otherwise consider using number ranges as a valid response for a different question type.]

[   ]

Radio Buttons 4 options (Agree Disagree, 4 options)

I hate ice cream

QUESTION TYPE: Radio Buttons 4 options

○ **Agree**

○ **Partly Agree**

○ **Partly Disagree**

○ **Disagree**

Radio Buttons 5 options (Agree Disagree, 5 options)

I really hate ice cream

QUESTION TYPE: Radio Buttons 5 options

○ **Agree**

○ **Partly Agree**

○ **Neither Agree nor Disagree**

○ **Partly Disagree**

○ **Disagree**

Radio Buttons Rating 1–5

How do you rate ice cream on a scale of 1 to 5, where 5 is the lowest (you don't like it)

QUESTION TYPE: Radio Buttons Rating 1-5 (Tell people what the highest is in the instructions or help text, or the question)

○ 1

○ 2

○ 3

○ 4

○ 5

Radio Buttons True/False

I absolutely love ice cream

QUESTION TYPE: Radio Buttons True/False

○ **True**

○ **False**

Radio Buttons with Valid Responses specified

What is [are] your favorite ice cream flavor[s]?

QUESTION TYPE: Radio Buttons Valid Responses [Instructions may include 'can choose only one']

○ **Chocolate**

○ **Strawberry**

○ **Vanilla**

Radio Buttons with Valid Responses specified and "Other" option

– Example includes Additional Feedback box

What is [are] your favorite ice cream flavor[s]?

QUESTION TYPE: Radio Buttons Valid Responses + Other [Instructions may include 'Can select only one' / Consider including the Additional Feedback box].

○ **I don't like ice cream**

○ **Chocolate**

○ **Strawberry**

○ **Vanilla**

○ **Other**

Radio Buttons Yes/No

Do you feel like eating ice cream right now?

QUESTION TYPE: Yes/No Radio Buttons

○ **Yes**

○ **No**

Text Multi Line

Please describe how you feel about ice cream

QUESTION TYPE: Text Multi Line

Text Single Line

Please name any other ice cream flavors you'd like to try

QUESTION TYPE: Text Single Line. (You can also ask people to supply a link here, e.g. to a large file or website)

Upload Document

Please upload any document (text, PDF, image) related to ice cream

QUESTION TYPE: Upload Document (You may want to specify other limits e.g. file size)

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