Qualitative Coding in Qualtrics using Text iQ

In addition to multiple-choice questions, it is common to include open-response questions in evaluation surveys to gather more detailed feedback from program participants about their experience. Qualtrics has a new tool, Text iQ, which allows you to identify and tag themes (referred to as ‘topics’ in Qualtrics) in your open-response data, which can be useful when it comes time to summarize your data in a report.

**Pro-Tip:** To set yourself up for success in using Text iQ, we recommend changing your question numbers to actual descriptive code names. In the example below, the question number has been renamed to ‘PLAN’ by simply clicking on the number and typing in a new name.

To access Text iQ, you’ll first navigate to ‘Data & Analysis’ in your survey.
This will take you to a table view of your survey results. Above the table, in the top left, you can select ‘Text iQ.’

This will take you to a new window where you’ll first select the open-response questions you’d like to code. You’ll see part of the question text is cut off. Using our new descriptive code name (‘PLAN’) makes it easier to find and select the question we’d like to code. Check the box next to each question you’d like to include and then click ‘Upload data.’

Qualtrics is now generating new data fields for each of your questions. This can take a few minutes to complete, depending on how many questions you plan to code.
Once Qualtrics completes this process, you’ll see a new window. You can see at the top left that you’re viewing responses for the PLAN question. By clicking this, you can view a different question to code. There are a total of 4 responses in this survey, each of which is displayed with a ‘+’ which we’ll use to add coded values.

If you click on the ‘Import topics’ button, you’ll see that Qualtrics has Starter Packs of coding themes that can be used as a starting point. These are largely geared towards marketing research and may not be relevant to your survey.

You’re also able to generate your own topics for coding, which is likely more useful if you’re coding evaluation data.
There are multiple approaches to qualitative data coding, some that are more rigorous than others. For more detail about different types of coding, check out this resource – https://gradcoach.com/qualitative-data-coding-101/

When evaluating programs, we often ask broad questions about what participants learned, what they appreciated the most about participating, or what they would recommend to improve future programs. Coding these types of responses doesn’t require a theoretical framework. Rather, we’re often coding for topics like -

- Specific sessions at a conference people liked most
- Whether people learned what was outlined in the objectives of a program
- Logistics of a program people would improve (e.g., room set-up, technology, food, time for discussion, breaks).

To add a topic to a response, simply click the blue + and type the topic. In this example, we’ve added the topic ‘healthy eating.’ Make sure you press ‘Enter’ after adding the coded value to save it.

Once you create a topic, it will be displayed in the menu on the left.
If you start typing a topic into a new response, you’ll also see your existing topics in a drop-down menu. You can select the topic from the drop-down menu rather than retyping the full topic name each time.

When you’ve coded all of your responses, you’ll want to click ‘Review and publish.’
This will show a new window where you can review the topics you’ve created and how many responses you’ve coded with each topic. Click ‘Publish’ to save your changes.

Now your coded values have been embedded into your data set. This will allow you to use these new coded topics to summarize your open-response data.

If you’re creating a Qualtrics Report of your results, you can include a figure that displays the count of each topic addressed in your open response data. You’ll click ‘Insert’ – ‘Embedded Data’ – and select the question you want to display (for this example, ‘PLAN – Topics’).
This will generate a figure that, with a little editing and reformatting, will allow us to display the topics addressed in participants’ responses.

If you download an Excel file of your data, you’ll see that there is now a data column for your coded topics. You can do this by navigating back to ‘Data & Analysis’ and on the ‘Data’ screen selecting ‘Export & Import’ – ‘Export Data.’ Qualtrics defaults to downloading the data as a CSV file, so you’ll want to select ‘Excel’ on the top menu.
If you open your Excel file and scroll to the right, you’ll see there are now columns for each of the questions you coded and the topics are included as a new piece of data, along with the rest of the survey data. By filtering your data by topic, you can review quotes that were coded with each topic and identify key quotes to include in your reporting. You can also generate figures summarizing the topics in Excel, similar to the one created using Qualtrics Reports.

For a more detailed tutorial on Text iQ developed by Qualtrics, check out https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/text-iq/text-iq-functionality/