TO DATE, THE EXCITEMENT AND opportunity of online research has been balanced by an equal amount of confusion and concern, in part because of a lack of understanding of this new medium and how it will impact the science of data collection. In an effort to better understand the strengths and limitations of this new medium, The Council of American Survey Research Organizations—through the efforts of its Internet Committee chaired by Kevin Mabley of CyberDialogue—has produced a list of questions and answers about the process of online research. Following the recent publication of Internet Guidelines by the European Society for Opinion and Marketing Research along with the support of U.S. associations, the research industry in the United States is continuing to work closely with its European colleagues to promote clear guidelines for Internet research. Here are the questions and answers from “CASRO’s FAQs about Online Research.”

Q: What are the available methods for online surveys? What are the advantages and disadvantages of each one?

Basically, there are three methods for conducting online surveys: e-mail surveys, HTML forms (HTML is an Internet programming language), and downloadable interactive survey applications.

E-mail surveys are often the fastest and simplest of the three methods, offering the widest reach (anyone with an e-mail account can participate) and requiring relatively little set-up time. Even a novice user can create and send e-mail questionnaires and analyze results using one of several available off-the-shelf e-mail survey software packages. However, because e-mail is limited to flat text format, questionnaires cannot typically include skip pattern logic, randomization, or thorough error-checking. Since respondents do not need to download any additional software or use a Web browser, e-mail surveys are ideally suited for internal audiences (employee groups, distribution partners, beta testers, etc.).

HTML form surveys offer the flexibility to create more complicated surveys with skip patterns, randomizations, grid-style rating questions, and may even include complex graphic images and sound. Although HTML surveys require substantially more programming time to design and construct, the advantages in questionnaire design flexibility and data questionnaire design flexibility and data collection often outweigh any marginal impact on cost and set-up time. Typically, respondents are invited via e-mail to participate in the survey, and given a URL (Web address) where they find and complete the questionnaire.

To create an even more interactive survey environment, downloadable survey “applications” incorporate the questionnaire into an executable file which respondents can download to their own computer, rather than complete on a host Web site. The program then takes respondents through the questionnaire and can include complex skip patterns or rotation logic. The construction, flow, and content of downloadable surveys are only limited by the creativity of the survey researcher. downloadable surveys can handle a larger number of Windows-based controls and can add “life” to a lengthy questionnaire. The main disadvantages are the expense and time required to program and distribute interactive surveys. When asking respondents to download surveys, it is important to keep in mind the sophistication of the respondent and their equipment, as well as the additional time it will take to download the survey. In addition, there is potential loss of respondent cooperation among those who are concerned about downloading files that may contain viruses.

Q: What about Qualitative research? Can Internet chat replace focus groups?

Online “chat” sessions, where one to dozens of pre-recruited respondents type in responses to a guided online discussion, can be used quite effectively to bring participants from virtually anywhere together to discuss a client issue, activities and experiences, or provide feedback on products. While the technology of IRC (Internet Relay Chat) and/or Web chat makes it easy to conduct discussions, it does not necessarily replace the benefits of traditional off-line methodologies. Virtual groups do not allow for tactile touch/feel experiences or capturing facial expressions (consternation, excitement, interest) of respondents as they are exposed to ideas and concepts. However, the depth of transcripts that can be derived from just an hour of discussion is powerful—often 20-30 pages of verbatim responses, available immediately. The primary advantages are speed of recruitment, elimination of travel costs and time required away from the office, respondent participation from the comfort of their own home or office, and depth of information yielded. While virtual focus groups will not always be able to replace in-person interviews, the benefits of speed and cost-savings of virtual focus groups make them a very effective tool for researchers—especially for gathering Web site feedback with
participants “in the medium.”

Q: How can I draw a sample of respondents?

Respondents for surveys can be recruited through a variety of methods, including customer/client lists, research company databases, targeted Web site promotions, on-site intercepts, online newsgroup posting areas, and even off-line methods such as mail and telephone. The most important rule for recruiting in this new medium is to get respondent permission first.

Although literally millions of e-mail addresses can be purchased or acquired very cheaply, the practice of “spamming,” or broadcast e-mailing without prior consent from recipients, is not tolerated by cybercitizens and can easily backfire to create a host of problems. Researchers should be encouraged to evaluate the adequacy of any list for online surveying using the same stringent criteria one would use for evaluating a list for other types of surveys, for example who it is intended to represent, how it was compiled, how complete it is, and so forth.

The online medium does, however, offer many reliable and effective sampling strategies. Because it is a new methodology and the composition of the online user universe changes so rapidly, a difficult part of the process is determining the sampling variables and their target proportions. Often, benchmarks can be established from traditional off-line surveys among online users or from information known about target respondents ahead of time, in order to balance or stratify a sample. There are several national research companies with pre-recruited databases of online participants that can be sampled for surveys. In panel research, quotas and screening can be used to identify and target the right respondents, in their proper proportion to the sampling frame. These databases usually consist of people who have volunteered to take part in online marketing research projects and who have been screened for online activities, as well as demographic, corpographic, and technographic characteristics. Panels add significant control during sampling and allow for efficiencies in screening and back-end data appending. (Contact the CASRO office for more information about companies who have created databases of online consumers just for this purpose.)

Incentives are usually set for each survey based on historical response rates for similar topics and length of time it takes to complete a given task. Panel research can be an effective way to survey a target population to meet the objectives of a particular study, but as with any method, researchers should evaluate the appropriateness of the panel in terms of how it was developed as well as how it is maintained and managed.

Outside of panels, participants can also be passively recruited through opt-in pop up screens or banner ads on Web sites, provided that results are intended to represent visitors to that Web site within that particular time-frame. When recruiting live on a Web site, care must be taken in designing a quota strategy that serves the study purpose. For example, if you want to represent all visitors to a particular Web site, you will need to identify how often an individual has visited the site. Simple random recruiting will necessarily over-represent the more frequent visitors to the site, and thus represent site visits rather than visitors. There are several techniques and technologies that can help accomplish quota sampling based on site traffic (“cookies,” registration data, or pre-screening), if it is in the client’s best interest to do so.

For companies that are considering future online research, adding an optional e-mail registration into legacy databases (product registration cards, telephone interactions, on-site registration, etc.) can prove to be a valuable resource for sample online studies. Further, online/off-line hybrid designs that recruit respondents off-line through phone or in-person interviewing can be a very effective way to take advantage of the benefits of both techniques.

When conducting e-mail surveys, online research practitioners have found the most effective invitations will have the following very specific components:

• A subject line that indicates the topic (e.g., “Survey Invitation for Online Travel Purchasers”).

• Where their email address was found (e.g. “As a recent registrant at our Web site…”).

• Who is conducting the research (e.g., “XYZ Company has been commis-

sioned by [Client Name optional] to perform this research.”)

• What the research will be used for and who will receive the data.

• A brief description of the topic (e.g., “We are interested in the opinions of those who have booked hotel reservations using an online travel service.”)

• The approximate time required (e.g., “This survey should take no more than 10 minutes of your time.”)

• A description of the incentive.

• The survey address (applicable only for Web-based surveys). Note: Most modern browsers will automatically detect a valid Web address and turn it into a hot link—allowing people to click on the link and immediately be transported to the survey site.

• Valid contact information (e.g. “If you have any questions about this survey, or if you experience any technical difficulties, please contact the Project Director, Ray Search at 1 (800) 555-1234 or email him at ray.search@researchco.com).”

• Your CASRO membership logo/s support.

Q: Should I worry about the security of my data?

Most security issues that have been raised with regard to survey technology have to do with electronic eavesdropping or “data clipping.” Clipping can occur when all the data from a survey are transmitted at once as a block of information (such as when you complete an entire registration form and press “submit” at the end). Although rare, someone with the right equipment could technically capture the data from your respondent’s completed survey, and if they knew the site address, could reconstruct the answers to the questions. This process would require a significant amount of work to attain one respondent’s answers to a survey questionnaire.

In the newer, more interactive forms of Web surveying, the data are submitted
as smaller blocks (particularly when the database needs to test a set of answers for skipping instructions, randomization, or other logical functions). Because the Internet sends each batch of information through an infinite number of routes, it is now almost impossible to get a block containing more than one or two disassociated answers. In addition, because the survey itself is interactive, it is extremely difficult to figure out which questions go with the answer data that have been clipped. Arguably, interactive surveys on the Internet can be more secure than typical telephone or paper and pencil methods.

Q: How do I know whom I'm talking to? How can I ensure they're being honest?

There are new technologies that can help to ensure that researchers are dealing with the correct online respondent when conducting research online. One effective way is to generate a unique Internet survey address for each invitee. This can be done by using a random generator to append a small tack-on address to the main survey URL (Web address). If, for example, we generate the random string "xt5-p," we can append this to the URL address in the individual invitation to participate (either through the mail or using e-mail). The resulting address, www.survey.smart.com/sbs/exqm_xt5-p, is unique to the recipient of the invitation. In conjunction with cookies and other technologies, this method allows respondents to click on a hot link and go to the survey site and either start the survey from the beginning or pick up where he or she left off. As the respondent attempts to enter the survey, the pre-determined address code is compared to a database. If the survey code is valid and has not been submitted previously, the respondent is admitted to take the survey. This system allows the respondent to complete one survey from any number of computers (either at home or work), unlike systems that rely solely on cookies for screening purposes.

Also effective is the use of a screening page for the survey where participants enter a password (something easy to remember like their e-mail address or panel membership alias). The entered address is then matched to an established participant invitee list to ensure a valid participant. For conducting panel or database research, this process is also helpful in linking background information to custom survey results. More recent developments from major browser producers allow for electronic signatures from individuals who have entered a password for access to the Internet. In the future, these "signed" documents will help certify who has submitted a completed survey. As with traditional methods, telephone or mail validation on a proportion of all respondents can be used to verify identities or stop professional respondents.

To help ensure honest results, screening questions can be re-asked within the survey in order to double-check that respondents are indeed who they say they are. Additionally, because they can participate at their own leisure, online respondents actually tend to be very cooperative and honest. Certainly, establishing the research company's support for respondent confidentiality and honest research will help respondents feel more comfortable sharing valuable opinions and information.

Q: How quickly can a project be fielded?

While quotas can be met literally overnight, there is a day of the week effect in terms of when people go online. Therefore, surveys should be left open for both weekends and weekdays. The length of a project, of course, varies according to the length of survey and methodology used. Research companies are still learning, and opinions vary, but here are some average times from final questionnaire to quantitative topline data:

- E-mail Surveys: 1 to 10 days.
- HTML Form Surveys: 3 to 15 days.
- On-site intercepts: 10 to 30 days (includes several days of custom programming and server installation).
- downloadable Interactive Surveys: 7 to 20 days (includes 3 days of custom programming/QA).

Overall, the "cycle time," or length of a typical project, can be much shorter online. This is because the time required in field can be greatly reduced. However, the design stages and analysis/reporting stages require just as much work as in traditional studies. Often, there is a misconception that because a project is being conducted online all aspects of the study are naturally much quicker.

Q: What is a reasonable length for an online survey?

Experience shows that a reasonable maximum length is about 20 minutes (similar to telephone). Longer surveys typically require higher incentives. Complexity of tasks and the interactivity of the process help determine the perceived length of a given survey and have an impact on completion rates. Often, the ideal length of an online survey depends on factors that are not related to the data collection, such as the type of population you are surveying, topic of the interview, and incentives used. As with other methodologies, a general rule of thumb is shorter is better.

Q: How projectable are my results going to be?

Statistical projectability relies on taking a sufficiently large, random sample within a known population (e.g., everyone in the population has a known chance of participating) in order to make results projectable to the entire population, give or take some level of error. In accordance with CASRO Survey Quality Guidelines, if a survey calls for a non-probability sample (where the probability of selection is unknown), it should be reported that results are not projectable to the entire universe. Online surveys are often used to determine the opinions and perceptions of the users of a particular Web site for site evaluation, new feature evaluation, and profiling. Utilizing probability samples in cases such as randomly intercepting users of a particular Web site can be an effective way to estimate the opinions of all users of that site. If you are attempting to determine all Web users' reaction to a new product concept, however, randomly intercepting visitors to a particular Web site probably won't map the total population of Web users that you are trying to represent.

The universe of online users (both business-to-business users and consumers) has grown to the point where it is considered a sub-group of such importance that it is worthy of study in and of itself—without the
questionable practice of attempting to project these findings back to the more general, off line population. For Web site developers, software developers, and technology-product manufacturers whose customers are often naturally online, online research can be an effective tool to reach and interact with valuable customers and prospects. As with any method, the objectives of the study should be well thought out when evaluating the online medium for conducting any project.

Q: What are cookies? Are these ethical? Can’t people get around these?

Cookies have been the source of a great deal of concern and alarm in the press. In simple terms, a cookie is a small bit of information that is stored in a user's browser, often just a code that contains the server name and a generated string of unique text and numbers. Cookies are used to store information about what pages you have requested within that specific site (and, only within that site). Any sites that need to “recognize” you without a password (such as a customized news reader, MyYahoo!, or other personalized sites) do so by storing the key to your profile as a cookie. We have certainly found, however, that there is a huge misconception among the public that cookies can reveal personal information, credit card information, or even the social security number of a site visitor. Unless the visitor has specifically offered personal information already on the site (e.g., through a registration form), there is no way for a site to know more about that individual than the unique cookie code within that particular site.

Cookies can be beneficial in research to determine where a respondent has “left off” in a survey if they wish to pick up again later and to help enforce quota controls and multiple-survey submissions. As mentioned above, cookies can also help researchers identify behavioral patterns of survey respondents, if the respondent has opted-in to do so, for richer analysis and sampling/weighting.

Although most new browsers allow users to either turn-off the ability to write a cookie or to alert the user when a cookie is being written, most people who take advantage of these options lose a tremendous amount of Web functionality. A potential case for inappropriate use of cookies has to do with unsolicited e-mailing. Some new technologies can read what sites you have visited and add you to a “contact list” that usually precedes an unsolicited e-mail. This technology is designed to customize advertising messages for a person’s “surfing profile.” For example, if you visit a lot of travel sites, you might begin to see more banner ads for travel promotions. All in all, this technique would not be considered under the category of market research, but does introduce a concept of e-SUGging (electronically Selling Under the Guise of research) to avoid.

Q: Can I run surveys on my own server or equipment?

Right now, several of these scenarios can be hosted by the client’s own server. Once the research partner has created an e-mail or HTML form-based survey, these can be put up on the client’s internal server. Other more sophisticated forms of Web-based surveying (Fixed Format and Custom Interactive Surveys) are currently being hosted only on the producers’ sites.

The Internet offers an innovative and valuable approach for market research decision support. With the basic knowledge of conducting sound research, survey research companies will take a proactive position in setting standards for quality and ethical research on the Internet.■

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