



## Guidelines for Email and Web Based Surveys

By Sally Hooper  
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As we all know, the Internet has presented a whole new medium in which to gather the public's opinion. You may have heard many things about Internet research, such as it's cheaper, faster, less reliable, less "rich" in content, etc. I have put together here some of my findings, observations and FAQ's (frequently asked questions from customers) regarding market research on the Internet as a guide to those about to start on Internet marketing research projects.

### Traditional Telephone Surveys versus Web-Based

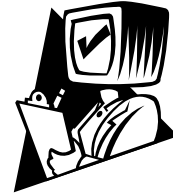
#### Reasons for Conducting a Telephone Survey:

- ❖ Your sample needs to be representative of the population as a whole.
- ❖ Your target group is not Internet oriented and/or may not have an E-Mail address or web connection, as in a small business, etc.
- ❖ You do not have Opt-In E-Mail addresses, but you do have telephone numbers.
- ❖ You need to screen for a specific person in a company, i.e. the VP of Finance.
- ❖ You have a very long or very complicated survey that may also require a live interviewer for prompting, clarification and probing.
- ❖ You have many open ended questions.
- ❖ You have a small sample size (10-30) that would not justify the programming costs.
- ❖ You have to locate the person by telephone, screen them and have only a few questions to ask; therefore it saves time and money to simply ask the questions while you have them on the phone

#### Reasons for Conducting an Online or Web-Based Survey:

- ❖ You already have a customer list or Opt-In E-mail list, which would mean \$\$ would be saved in having no telephone recruiting cost.
- ❖ Your target group is Internet savvy, has E-Mail addresses and is accustomed to using the Internet.
- ❖ Your target group has a high interest in participating i.e. membership lists.
- ❖ You have a graphic, plan or presentation that could be viewed easily on a web site thereby saving the cost and time of printing and postage.
- ❖ A visual presentation of the questions themselves would be easier to understand than hearing the questions (audio).
- ❖ You want them to give you long detailed answers to open ended questions. Note: you would lose the aid of probing techniques.
- ❖ You need certain types of information; confidential, embarrassing or information they may not have readily available to them.
- ❖ You have a tracking study that will continue for a length of time allowing the online survey to just stay up and be used indefinitely, thereby saving new setup and programming costs.

## Pluses & Minuses of Internet Research



### Eight Pluses:

- ❖ Respondents can complete the survey at their leisure.
- ❖ Respondents often have a higher interest in participating, once they agree.
- ❖ Speed -- 90% of results arrive within the first 2 days ? 30% -50% in the first few hours!
- ❖ Geographical issues: respondents can be local or world wide.
- ❖ Costs can be lower but not always.
- ❖ Can be easier to find certain hard to find respondents.
- ❖ Relative anonymity of the Internet and Internet customs may produce more detailed, thoughtful, honest answers which they might be reluctant to tell an interviewer in person.
- ❖ Many more persons are online today.

### Eight Minuses:

- ❖ Relative anonymity can produce more readily expresses negative answers!
- ❖ Requires careful screening to verify respondents are who they say they are.
- ❖ Sample is not project able and therefore is more qualitative than quantitative in nature.
- ❖ Length of respondent's attention for focus groups (45 minutes) is more limited than during an in person group as respondents can just wander away from their computers!
- ❖ Size of online focus groups needs to be somewhat smaller (6-8) in order to handle the group and allow all to participate.
- ❖ Typos and spelling errors are an undeniable part of communicating on the Internet!
- ❖ Although greatly improved, use of the Internet can sometimes be challenging in that lines can unexpectedly go down and there is nothing you can do about it but wait or re-schedule.
- ❖ If respondents are not Internet savvy they will need to be educated and coached through the process, this can be a challenge!

## About Return rates for Email Studies and Web-based Surveys:

The following information all assumes that respondents have either agreed to participate through a telephone recruit or are members of a group, company or association, or are a customer of such group, company or association.

The return rate for a blanket outreach of email is not much different than a mail survey where return rate can be 10%.

Return rates for email invitations to go to a web based survey, are generally less than 10% depending on the specifics of the study.



### The following all affect return rates:

- ❖ How interested in general are they in the topic?
- ❖ Is an incentive offered and how much?
- ❖ Length of survey.
- ❖ How recently did they agree to participate? (Opt-In)
- ❖ Did they agree to participate? (Customer or Member ship list)
- ❖ Level of difficulty/complexity.

### Some return rates and qualifications:

These are not hard and fast rules. They are based on my experience and are approximate.

- ❖ No contact in awhile/no recent telephone recruiting/no incentive = 5%
- ❖ Recruited by telephone/recent contact/small incentive (\$10) or some interest = 10- 15% maybe 20%
- ❖ Same as #2 with larger incentive (\$50) = 50%
- ❖ Same as #2 with very large incentive (\$75-100) = approx. 70-80%

### Note:

Return rates can NEVER be guaranteed! Basically, you put it out there and get back what you get back, based on the true perception of the respondent's interest and the above factors. If another company (we do not), guarantees you a certain return rate, they are just telling you what you want to hear. Remember your customer or the respondent may not be as interested as you are in your product's details. If you MUST have small quotas or exact numbers, a telephone survey is a better choice.

## Pointers for Conducting a Web Based survey:

*Based on my 18 years as a Field Director and my many years of developing online surveys and projects, these are the things clients should know. With all this said and done, Internet Research is an exciting new opportunity to gather data in ways the Marketing Research Industry could have never anticipated and has many as yet unexplored avenues.*

- + Do not assume because it is going on a computer that anything can be done. Use the KISS philosophy. Simple gets better results and costs less.
- + Web programming takes time, anywhere from a few days to a week to program and test. Plan this into your schedule. In general the setup takes the most time but the speed of the return rate is fast. 90% in first 48 hours, almost all within a week.
- + Make sure your questionnaire is final before giving to the programmer; changes take time and money and can delay the start date.
- + You may think your draft questionnaire is shorter than it really is. It is hard for a customer to estimate the length of a survey based on a Word document that, yes indeed, may occupy one page in length. Each question that may be within a question has to be separated out and asked individually. Don't be surprised when your 2 page word doc turns into 50 questions! Best to ask ONLY actionable "necessary" questions and not "nice to know" type of questions.
- + There is no "magic number" of questions to ask in a web survey, like 6 questions or 15 questions = 10 minutes for length of time for respondents to complete the survey. Keep questions as brief and simple and actionable as possible. Then submit your draft questionnaire to your supplier for an evaluation of length of time.
- + Open ended questions, like: What do you think of our recent changes? Are more expensive to tab and code, as opposed to a list closed ended answers, like: Which of the following best describes your opinion on our recent changes? Check one: ( ) Very satisfied, ( ) Somewhat satisfied, etc. To keep costs down keep open ended questions to a minimum unless they are really what you need and are willing to pay the coding costs.
- + You can show graphics and collateral's easily in a web-based survey, but it will need some preparation. Remember though, it is being viewed on a computer screen and therefore does not have the quality of a printed document and has to meet size/download speed requirements. In my experience, graphics always need some work before they can be shown on a website. A Power Point document cannot be considered to be of good enough quality to go directly to a web graphic! Nor is one that is printer ready and has a huge file size. Know that your supplier will have to tweak the graphic.
- + About "templates": You may have been given what someone told you was a "template" and you may have been given the impression this would then make the survey easier and less costly. A "template" is a "survey" that someone else has done with their software and their system requirements. For them it is a template. For your supplier it is someone else's programming that we will need to re-program - in the worst case - or re-use pieces of in the best case.
- + Cost factor: You may have heard that web surveys are very cheap or cost less. This can be true, but that depends entirely on who your respondent is, how easily he can be recruited, the length of the survey, complexity of survey and the return rate factors listed. Do not just assume a web base survey will be automatically cheaper.

**-Bon Voyage-** Sally Hooper, Crusader Services, See Sally's Bio on the next page

## Biography: Sally Hooper



Sally is a Principle of the Crusader-Services. Crusader Services specializes in Web Portal Systems (online \*BBS's), online marketing research, and the development of special projects for selected clients.

Sally Hooper has many (over 18) years experience in the Marketing Research Field, most of those as Field Director and Director of Online Research, where she managed literally hundreds of Corporate business to business studies of every kind. She has worked at every level of the field starting as a telephone interviewer.

Sally is also a trained artist (painter) who is an enthusiastic hands-on coder and web designer. She designed and programmed her former company's Corporate Website as well as designing a website for the California Restaurant Association. She is currently designing the Crusader Services website in Post Nuke's Web Portal/Content Management System.

She was a pioneer of online marketing research. She began "championing the cause" in 1995, quickly putting her company online and developed many applications for her newly created Online Research Division. By 1996 her company was online and using the online methods with their own site, own online surveying software and own online focus group program. All of this software was developed by Sally and The Crusader BBS. She now has over 12 years experience in the online world.

Previously, Sally and her husband, Jack Farmer, had been running a \*BBS (Bulletin Board Service). She was the \*Co-SysOp of the then 4 line BBS, The Crusader BBS. The Crusader BBS, was a well known world-wide BBS and had been online since 1985. The Crusader BBS was also a pioneer in its field, being among the first to use many new technologies. This gave Sally invaluable hands-on experience in online communications.

Sally's experience and background gives her a unique set of business skills which allows for an unusually open and creative approach to problem solving. She has an excellent understanding of both business and technical issues and knows how to incorporate this with good visual design.

### Education:

BFA from The Cleveland Institute of Art's 5 year program, with additional study at Northridge College, Santa Monica College and The Woman's Building.

### Certificates:

Burke Institute, "Certificate of Proficiency in Marketing Research & Applications"  
Marketing Research Association, University of Georgia, Certificate "Principles of Marketing Research".

### Associations:

AMA, the American Marketing Association, and MRA, the Market Research Association.

### Notes:

\*BBS = Bulletin Board System A system used for providing e-mail, conferences and file uploading and downloading. A communication and interchange system.

\*SysOp = Systems Operator

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