

Chapter 1

Understanding Online Surveys

In This Chapter

- ▶ Discovering the world of surveys
 - ▶ Defining the need for conducting surveys
 - ▶ Finding out whether online surveys are right for you
 - ▶ Understanding the types of online surveys
 - ▶ Supplementing online surveys
 - ▶ Looking at the industry standards
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Surveys aren't merely a luxury — they've become a necessity for almost all types of research. Whether it's a *satisfaction survey* (a survey designed to measure consumer satisfaction) that your boss is insisting you complete by noon or a complex public health study that'll help you earn your Ph.D., Web-based surveys have emerged as the most affordable window into the world of your clients.

Online surveys are a tool for electronically collecting survey data from your target audience via the Internet. If your mind is rolling over and over with questions about online surveys, never fear; the answers are here within this book. If you come from the old school of market research, your brain might start reeling when it sees all the modern technology available for surveyors today. But your brain will soon thank you because tapping into the power of online surveys makes your life so much easier.

How so, you ask? Instead of using your brain power to crunch numbers, for example, you can use it to dig deeper into meaningful insights that drive results and make you look like the Superman (or Superwoman) of your organization. Using online survey software reporting tools, you can slice and dice your data in more ways than one to answer questions from many different angles.

In this chapter, you're introduced to the wonderful world of online surveys. If you're still wondering what an online survey is, you can get your answer here. If you want to know who should use online surveys, we have that covered, too. We even show you some of the basic types of surveys so you can get a taste of what's possible in this digital world of market research. We also talk about additional survey methods that complement online survey

software. We wrap up the chapter with a discussion on the standards of the market research industry.

Surveying 101

Before we get into the world of online surveys, you need to get a quick foundation on surveying, its history, and why it works. (That's why we call this section "Surveying 101.") Merriam-Webster defines a *survey* as "questioning or canvassing people selected at random or by quota to obtain information or opinions to be analyzed." In simpler terms, a survey is a poll.

The first known survey conducted in the United States was the U.S. Census of 1790, but most of the survey industry's growth came after World War II. According to the Council of American Survey Research Organizations, in the first part of the 20th Century manufacturers didn't have to be concerned about marketing because items like soap were made a batch at a time and sold door-to-door. There were no colors, fragrances, or performance differences. Soap was soap, and consumers were glad to have it. Manufacturing advances led to better products, more choices, and the need to conduct market research. Surveys offered a way to discover what consumers liked — and didn't like.

How surveys work

Here's how surveys work: Just as a doctor takes a sample of blood for a blood test (notice we say a *sample*; he doesn't take all your blood), a market researcher asks questions to a small sample, or subsection, from a large group of people. This method makes surveys a time-efficient and economical way to conduct market research, as it would generally be improbable to examine the entire population.

The key to accurate surveys is getting the proper representation of *demographics* (population characteristics) to represent the *target audience* (the primary group that something is aiming to appeal to) as a whole. If you want to know whether your new soap fragrance might be a hit with consumers, you need to sample a *cross section* (a sample that represents the entire population) of your target audience, whether that's broad or narrow. If you're targeting women, for example, then you want a broad spectrum of ages. If you're targeting elderly women, by contrast, then your spectrum would be narrower.

Surveys are proven to work time and time again. Just about everything you see in the store is a product of market research — from childproof caps on medicine to the location of shopping centers to, yes, new fragrances of soap — and that market research included surveys in some way, shape, or form.

What is an online survey?

Just as there are many ways to skin the proverbial cat, there are many ways to conduct a survey. You could go door-to-door with a pen and pad, stand outside your local grocery store with a pen and pad, make hundreds of telephone calls, or do mass mailings through the post office. Or you could do it the easy way — with an online survey. An online survey is just that: a survey that collects data electronically from your target audience over the Internet (see Figure 1-1).

An online survey gives you the best of all survey worlds. It's the easiest way to distribute and collect information. It's the fastest way to create customized surveys based on different target demographics. It's an anonymous way to get feedback from customers, clients, and partners about products, services, marketing campaigns, and just about anything else. In short, online surveys give the survey creator and the survey taker ultimate flexibility, freedom, and convenience.

Online Surveys | Zoomerang

Community Growth & Development

1 How concerned are you about community growth? Please rate your concern using the 1-4 scale where (1) means "a great deal" of concern and (4) means "not at all" concerned.

A great deal	Somewhat	Not too much	Not at all
1	2	3	4

2 How much growth and development has occurred in your community over the past five years?

A great deal	Some	Very little	None
1	2	3	4

3 How much more growth and development would you like to see in your community in the next five years?

A great deal	Some	Very little	None
1	2	3	4

4 What kind of effect has growth and development had on the overall quality of life in your community?

Very positive	Somewhat positive	Somewhat negative	Very negative
1	2	3	4

5 Please indicate what kind of effect growth and development has had in your area on each quality-of-life aspect listed below. Please answer using a 1-4 scale where (1) means "Very positive" and (4) means "Very negative"

Figure 1-1:
A
Zoomerang
online
survey.

What you need to know about online software

The way people buy software has changed dramatically over the years. Sure, you can still go to your favorite big-box computer retailer and purchase a box with a CD containing your program of choice — in most cases, anyway. But online software, or Web-based software, is dramatically changing the face of the industry. As its name suggests, *Web-based software* is software that's hosted on a Web server. That means you access it through your favorite Web browser.

The inherent advantage of online software is the ability to access it anytime, anywhere, from any computer. As it relates to online surveys, using Web-based software means you can

launch a survey from a hotel room in Hawaii just as easily as you can from your desk in Des Moines. You can also track your responses along the way and analyze the results.

Web-based software has some potential disadvantages, however. If the Web server on which the application is hosted gets overloaded, the software might not be available or it might run slower than you'd like. Some people also point to the security risks with online software. The bottom line: Check out the track record of your online survey software company. Even the best companies have seen their servers crash, but a pattern of downtime or security breaches should raise a red flag.

Examining the Need for Conducting Surveys

You picked up this book, so we figure you're fairly well convinced that you need to conduct surveys. We're also pretty sure you've decided that online surveys are at least one vehicle you want to use to find the answers you need.

Of course, surveys aren't the only way to get information. You could use existing data from other sources to answer your questions, such as market research reports from major firms. You could also hold focus groups. You could even rely on technologies like Web analytics to determine customer interests. (Check out *Web Analytics For Dummies*, by Pedro Sostre and Jennifer LeClaire, (Wiley Publishing, Inc.) for a good read on the nearly endless data-mining opportunities available through Web analytics software.)

For some, however, a survey is the best answer for getting, well, answers. There are many reasons why you might want to conduct a survey. Here are a few:

- ✔ **Surveys uncover marketplace potential.** If you want to know whether your customers would buy a new product you're considering manufacturing — or a new service you're thinking about launching, a new employee benefit you're mindful of adding, or some other addition to your offerings — then conducting a survey is one of the quickest ways to determine whether your target market is receptive to what you have to offer. The

survey can also help you hone in on the details around your products, services, and programs that your target audience appreciates most.

✔ **Surveys help determine weak spots in customer service.** Do you have new competition coming into the marketplace? You'd better shore up your customer service and product offerings now before your competitor steals your unhappy customers. It might be time to do a customer satisfaction survey to determine where your weak spots are. You might discover that your call center personnel are aggravating your customers or that your packaging really annoys them. Or, you might find your customers are loyal and you shouldn't change a thing. Better to find out now.

✔ **Surveys reveal public opinion.** You don't have to be Gallup (a well-known polling company) to run a public opinion poll. If your organization is about to make a decision that could impact the community — like bulldozing a public park to build a self-storage facility or erecting a statue in the town square — you'd better get the public's opinion, or else you might find out the hard way that you don't have the public's support. In other words, if your decision making is driven by public reaction, surveys can reveal the information you're looking for.



Most online survey companies provide you with templates based on the type of survey you want to conduct (see Figure 1-2). These templates even suggest question types that are common to your objectives to give you a head start.

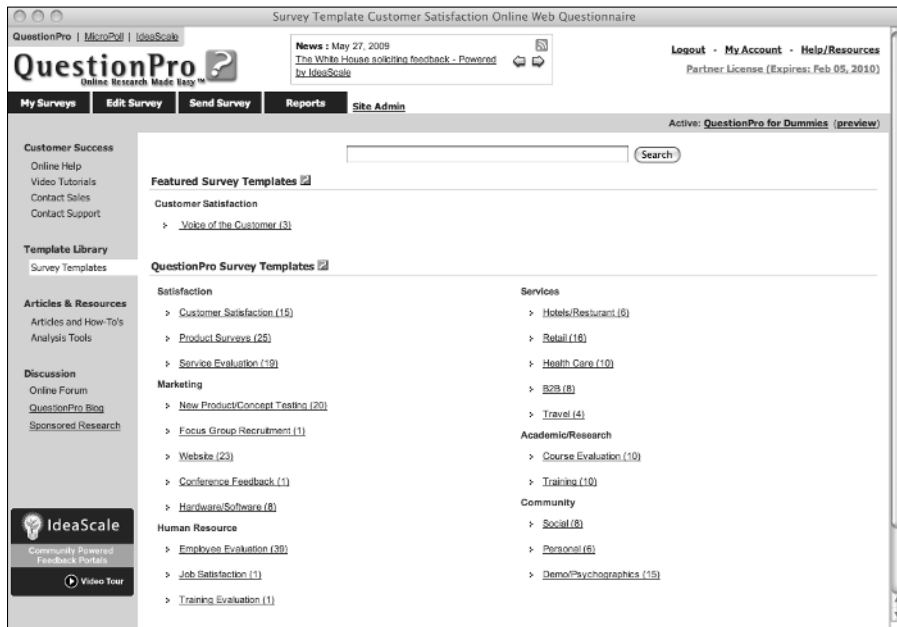


Figure 1-2:
The
QuestionPro
template
library.

Deciding If Online Surveys Are Right for You

For all the virtues of online surveys, they admittedly are not the best solution to every information-seeking mission. Sometimes you need to be in the thick of the action to get the results you need. Sometimes you need to send out paper-based surveys because your target audience just isn't online. And sometimes telephone surveys are the best approach. We take a look at your offline options later in this chapter. For most companies, however, online surveys are a viable option for gathering opinions, reactions, and other feedback.

Before going any further in this book, take a look at the following sections, which discuss the benefits and drawbacks of online surveys.

Understanding the benefits of online surveys

Consider these benefits when determining whether online surveys are the right vehicle for your information needs:

- ✓ **Save time:** If you want to save time, online surveys are a good choice. Paper-based surveys can be time-consuming to develop, distribute, and analyze. Online surveys have a broader geographic reach so you don't have to put employees on the street — or on the phones — to survey the land.
- ✓ **Save money:** Online surveys are the top choice when money is an issue. Online surveys are perhaps the most cost-effective method to conduct surveys because after you develop the questions and launch the survey, it's up to the respondents to do the rest. You don't need to pay for envelopes to stuff, buy stamps, hire pollsters, or bankroll call centers.
- ✓ **Assistance developing questions:** If you need help developing questions, online surveys are again a winner. With paper-based surveys, you're on your own. Online survey vendors like QuestionPro offer templates and other helpful tools to help you design surveys that yield the types of answers you need to move your organization closer to its goals.
- ✓ **Quick feedback:** Online surveys offer real-time responses, which allow you to get quick feedback. This means you can get play-by-play action on the answers as they roll in. What could be more fun than a live look at the results?
- ✓ **Creation of charts and graphs:** If you need to create charts and graphs, online surveys can help. Paper-based surveys demand your data input and analysis skills. Online surveys offer analysis tools that do the number crunching for you.

- ✔ **Ability to change the content of the survey:** Online surveys give you the flexibility to change the course of your survey midstream. After you print paper-based surveys, you're stuck, but with online surveys you can change questions, delete questions, and add questions as you discover the need.

Knowing the drawbacks of online surveys

Online surveys are a great alternative to expensive mail or telephone surveys. However, you should know about a few caveats to online surveys. Ask yourself these questions to determine whether online surveys have too many drawbacks for your particular project:

- ✔ **Are you trying to survey a representative sample of the general population?** Remember that not everyone is online. What's more, not everyone is receptive to online surveys. Studies show the demographic that responds to online survey invitations is generally biased toward younger, more computer-savvy people.
- ✔ **Are you averse to risk?** Several technical glitches can derail your online survey. The respondent's browser might crash, and she might be too frustrated to restart the survey from scratch. What's more, programming errors can cause error messages. Power outages might keep respondents from finishing the survey.
- ✔ **Are you concerned about accuracy?** Online survey respondents can lie about their age, though this possibility exists with other forms of surveys as well. Lying about gender is another possibility, one that's avoided through in-person and phone surveys. If the respondent doesn't fully understand the question in an online survey, he has no one there to explain it to him.

Table 1-1 lists some of the pros and cons of online surveys.

Table 1-1 Pros and Cons of Online Surveys	
<i>Pros</i>	<i>Cons</i>
Save time	Everyone is not online
Save money	Technical glitches could cause errors
Help developing questions	Respondents may not give accurate answers
Quick feedback	Could take weeks to tally responses
Charts and graphs	Need design skills to create accompanying art
Ability to change questions	

Looking at the Types of Online Surveys

There are many different types of online surveys, but most of them fall under four basic categories: customer satisfaction, customer loyalty, market research, and human resources. The following sections take a more in-depth look at each of these four types.

Calling on customer satisfaction surveys

Customer satisfaction surveys set out to determine whether your customers are satisfied with your products and services. The goal is to measure the customer perceptions of how well your organization delivers on its critical success factors. Those factors typically include service promptness, staff responsiveness, and understanding the customer's problem. Armed with this information, you can shore up your customer service efforts.

Customer loyalty surveys

Measuring customer loyalty is critical in an ultracompetitive marketplace, and online surveys can lend a hand in doing so. It's been said that acquiring a new customer is about ten times more expensive than servicing an existing customer. By conducting customer loyalty surveys (see Figure 1-3), you can identify customers who promote your company, customers who are passively satisfied, and customers who are most likely to abandon you in favor of a competitor. Then you can decide how to respond to each customer type.

Market research surveys

Market research surveys are what most of people are familiar with. These surveys attempt to determine what flavor of toothpaste consumers would like to see on the market, how the interior design of a vehicle could better serve them, or whether they'd eat some new strange spice on a potato chip. Market research surveys are one of the driving forces behind product innovation. Smart companies don't launch new products without doing market research first, and online surveys play a part in that research.

Human resources surveys

Human resource surveys can come in multiple forms. The most common are employee satisfaction surveys and employee exit surveys. Employee satisfaction surveys focus on things like work hours and benefit plans. Employee exit

surveys gather information about people who are leaving the company, either through resignation or termination. Both survey types are vital for large and small companies that believe employees are the lifeblood of a company.

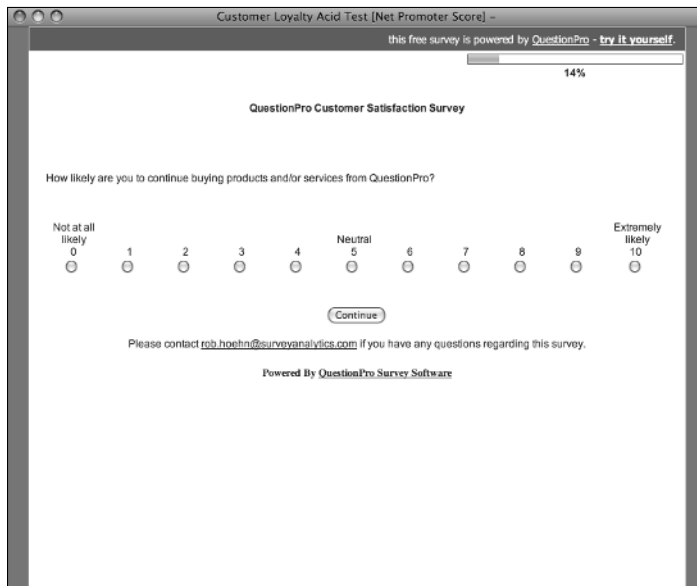


Figure 1-3:
A customer
loyalty
survey.

Augmenting Online Surveys

Sometimes you can't always reach your respondent online — getting a survey to someone who doesn't own a computer will always require some additional steps. However, there are many methods to bridge the gap between reality and online survey software: mail surveys, telephone interviews, in-person interviews, and drop-off surveys.

Making the most of mail surveys

When it comes to surveys, conducting your interviews via traditional mail has its advantages. You can select your sample from a database of mailing addresses that target specific demographics by neighborhood. So if you want to reach affluent consumers only, mail surveys would let you do that. By the same token, if you want to reach consumers with children, mail surveys might also help you narrow the field.

This survey type can be costly, though, because of printing and postage. Typically surveyors send out an advance letter, followed by the survey, and finally a follow-up postcard reminder to those who didn't meet the deadline.

A thank-you postcard is also in order. That's up to four separate mailings for one survey, and you still have no guarantee you'll get an answer.

After all the paper surveys are collected, responses can be transcribed using an online survey tool. The analytical tools that are included for free in most online survey software can then be leveraged.

Talking up telephone interviews

Telephone interviews can also narrow the field through directories listing databases. But few people like to be bothered at home with unsolicited phone calls. Telephone surveyors often are mistaken for telemarketers. The benefit to telephone surveys is that you can get more rapid responses than with mail surveys. The surveyor can also manually input respondent answers into a computer using online survey software while conducting the survey, so the results can be tabulated fairly quickly.

Facing up to face-to-face interviews

In-person interviews are a good option when you have personnel on hand that can go out into the communities, in front of grocery stores, in malls, or door-to-door with a clipboard and survey form in hand. Surveyors may obtain lists of suitable demographic areas (or just seek responses from people who seem to fit their profile) and ask qualifying questions to ensure they are surveying the target audience. This survey type can be tedious because those answers then have to be entered into a computer at a later time, but for live events such as voter polling this is the best solution.

Dealing with drop-off surveys

The drop-off survey is not often used these days. It combines mail surveys with in-person interviews. The surveyor visits potential respondents door-to-door and drops off the survey, and the respondents then mail the surveys back to the surveyor.

Searching for Standards

Online surveys are still an emerging segment of the market research industry. Although Fortune 500 companies are using online survey software regularly, it's a newer area and one with far fewer industry standards. For example, some companies refer to online surveys as *Web surveys*. Some companies call

them *e-surveys*. Others call them *electronic surveys* or *Internet surveys*. The good news is you can employ research quality best practices across all types of market research, from paper-based surveys to telephone surveys to focus groups and beyond. The Marketing Research Association (<http://mra-net.org>) and the Council of American Survey Research Organizations (www.casro.org) offer strong standards guidance.

Making friends with the Market Research Association

The Marketing Research Association (MRA) was formed in 1954 as an outgrowth of the Trade Problem Discussion Group of the American Marketing Association's (AMA) New York Chapter. MRA is a self-managed, not-for-profit organization that provides programs and services for members to do the following:

- ✓ Enhance their professional development
- ✓ Stay connected with the marketing research community
- ✓ Gain insight into information about trends occurring in the industry
- ✓ Network with fellow researchers

The MRA offers a Respondent Bill of Rights, for example. The Respondent Bill of Rights is a document that describes the principles governing the researchers' responsibility to respondents. The group also promotes Survey Non-Response Metrics. Response rates and other non-response measures are thought to be important indicators of survey performance. Historically, the survey research profession has been divided in a consistent method of calculating these metrics. MRA recommends researchers use this guide to determine the appropriate formulas for calculating and reporting survey non-response. The most reputable companies in the online survey software world belong to the Marketing Research Association, but you don't have to be a member to glean from its resources.

Counseling with the Counsel of American Survey Research Organizations

Founded in 1975, the Council of American Survey Research Organizations (CASRO) represents over 300 companies and research operations in the United States and abroad. CASRO promotes a rigorous code of conduct that enhances the image of survey research and protects the public's rights and privacy. CASRO requires members to adhere to the CASRO Code of Standards and Ethics for Survey Research, a tough, internationally cited set of standards that has long been the benchmark for the industry.

The Code of Standards and Ethics for Survey Research sets forth the agreed-upon rules of ethical conduct for survey research organizations. Acceptance of this code is mandatory for all CASRO members. The code has been organized into sections describing the responsibilities of a survey research organization to respondents, clients, and outside contractors as well as in reporting study results. If you want to make sure your surveys hold the highest integrity, reviewing the CASRO code of standards is a must.