*e*Solutions

Practical Online Research

GEAR Lucerne 2nd May 2001
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Research ABOUT the Web

1. How many users? Who are they ?   → CATI monitors
2. How do they behave? What do they like? → CAWi monitors
3. How big are Website audiences ?

→ 3.1 Logfile analyses
→ 3.2 Meter Panels (MMXIE, Nielsen, Netvalue etc.)
→ 3.3 CAWI recall studies

4. How good are Websites?

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→ 4.3 Website evaluation by pop-up surveys
→ 4.4 Quantitative CAWI research

Research VIA the Web

The „real" chances lie in using the Internet as a <u>tool </u>of
   general market research:

With up to 60 % of adults in some countries using the Web,
market research via the Internet becomes an interesting
options. As in conventional research there are two ways:

1. Quantitative applications
2. Qualitative applications

Some Definitions

CATI = Computer Assisted Telephone Interviews
      (done from a telephone studio)
CAPI = Computer Assisted Personal Interviews
      (carried out by laptop in home of respondent)
CAWI = Computer Assisted Web Interviews
      (questionnaire offered on Internet)

LOGFILE: small record of Internet activity on harddisk
REACH: unduplicated (four weeks) reach/unique visitor.
SCAN CONVERTER: device to put screen image on tape

Research ABOUT the Web

1. How many users? Who are they ?
CATI monitors probing the market

In most countries of Western Europe, leading research institutes use regular <u>telephone surveys</u> to establish the figures for ACCESS to and USE of the Internet.
In Eastern Europe, also face-to-face surveys are used.

For topical figures of <u>Internet USE</u> see map and table frequently updated on: http://www.gfk.at

Penetration is highest in Scandinavia. Western Europe is closing in, Southern and Eastern Europe almost equal but growing too.

Development of the Web

In several countries the penetration of Internet use is being measured since a number of years. The following observations can be made in Austria:

1. Total penetration still growing because home use grows

2. At work use levelling off (many offices already connected)

3. Use at school and university still rising slightly

4. Mobile access no factor yet, but probably increasing soon
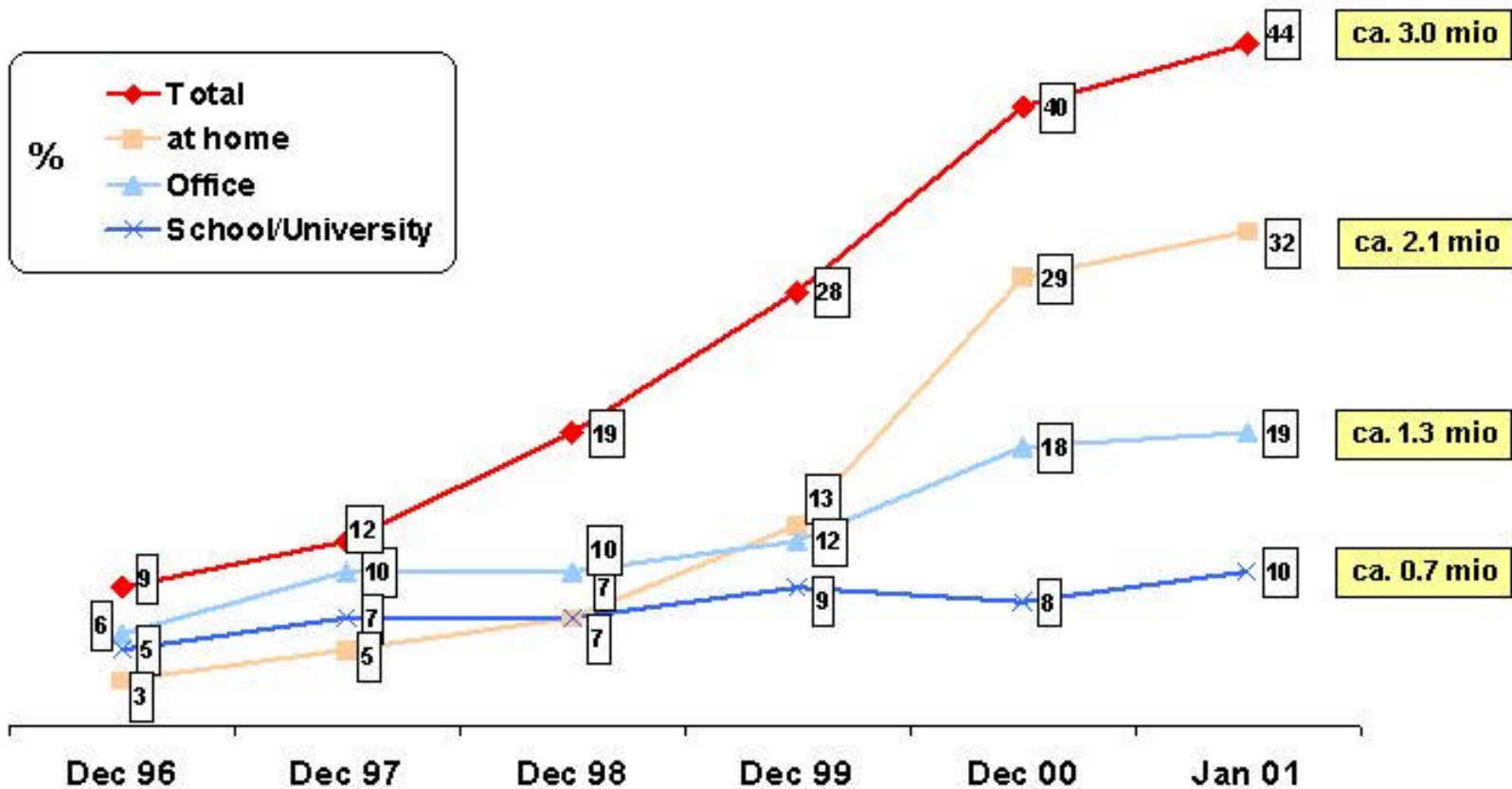
See next slide!

Internet 1996-2001

AUSTRIAN INTERNET MONITOR (AIM)

GfK **INTEGRAL**

Internet Use
Basis: Austrian population 14+

Legend:
- Total
- at home
- Office
- School/University

%

	Dec 96	Dec 97	Dec 98	Dec 99	Dec 00	Jan 01	
Total	9	12	19	28	40	44	ca. 3.0 mio
at home	3	5	7	13	29	32	ca. 2.1 mio
Office	5	10	10	12	18	19	ca. 1.3 mio
School/University	6	7	7	9	8	10	ca. 0.7 mio

2. How do Internet Users behave?

In order to find out about <u>details</u> of use, soft-
and hardware configurations, exact shopping
habits, surf-styles, life-

In many countries, official or private „audit services" are commissioned to publish certified logfile analyses. Based on server-centric („clickstream") measurement, various calculations can be made about browser contacts with Websites. The main currencies used are:

* Page impressions (pages opened)
* Visits (complete sessions)
* Ad impressions (pages opened carrying ads)
* Ad clicks (how often is an adverising banner clicked through)
  Examples can be seen at:

http://www.pz-online.de   http://www.oewa.at

Note: Only browser accesses are measured, not persons.

How big are Website audiences ?
3.2 Meter Panels (MMXIE, Nielsen, Netvalue etc.)

The most professional, but also most expensive, way to measure audience size, frequency and duration of use, demographics, surfstyles, lifestyles, consumer habits and contact with (banner) ads is by METER PANEL.

With slightly different methods, but mostly only in private households, measurement is carried out by:

MMXIE: http://ch.jupitermmxi.com/home.jsp
                http://de.jupitermmxi.com/home.jsp

Nielsen: http://nielsen-netratings.com
NetValue: http://www.netvalue.com   and others.

Internet Meter Panels

→ Meter panels are available in most Western European countries.

Advantages of existing Internet meter panels:
 - Continuous, instant, precise measurement of Web use
 - Exact data for site operators and advertizers
 - Easy international comparison

Disadvantages of existing Internet meter panels:
 - Prohibitive cost on small European markets,
 - Building of out-of-home user panel very difficult,
   realization may take years
 - European meter panels are too small to describe
   the audience structure of sites other than the leading
   ones.

How big are Website audiences ?
3.3 CAWI Recall Studies

In the period until meter measurement becomes feasible also in smaller markets, there is the possibility to use telephone recall (CATI) or Web-based questionnaires working according to the „logo-list priciple" (CAWI).

While telephone recall is not reliable, Web based logos can enhance quality (hot linked with „mouse-over")

<u>The Austrian example:</u> The ORF has commissioned waves of n = 5.000 interviews with a questionnare seen on next slide.
cf.: http://mediaresearch.orf.at/inter_30.htm

<u>Advantages:</u>
- In-home + out-of-home audiences (1/3 higher !!!)
- Moderate cost (no panel, but individual samples)

<u>Disadvantage:</u>
- Subjective elements in the recall method.

Audience Size Measurement by Logolist

4-Weeks Reach   **Frequency of Use**

How good are Websites?
4.1 Qualitative one-to-one tests (lab)

Like in all applications of <u>professional market research</u>, the first step of *Web site evaluation* should be a *one-to-one in-depth interview.*

FESSEL-GfK has set up a test room where target persons are asked to „surf and talk". While a *scan-converter* (alternatively: a software „screen-recorder") records the mouse movements on videotape (harddisk), a microphone picks up the „think-aloud" comments of the respondent.
Result is a second-by second record of the test.
For exact set-up see next slide.

Qua
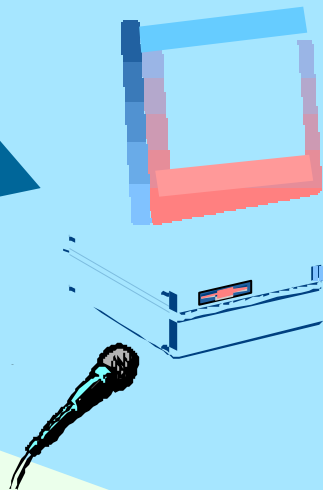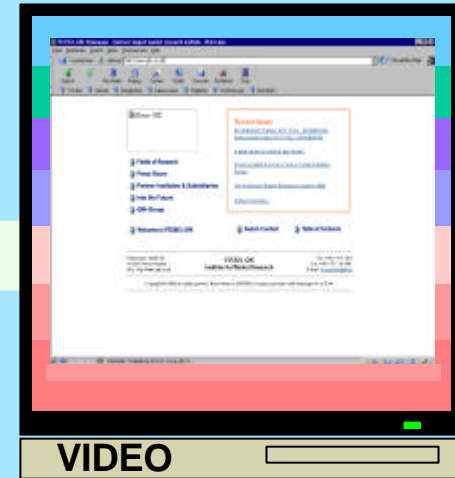
VIDEO

„Accompanied Surfing" – with microphone, scan converter
and video recorder

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How good are Websites ?
4.2 Group discussions with (live) presentation of Websites

<u>The set-up is quite conventional</u>:

A group of 8-12 participants is assembled in the discussion room – seated at small tables. Via *videobeamer* the Website(s) is/are presented.
If there is no Internet connection, it is possible to show *screenshots* – either as a powerpoint presentation or by over-head projector. Then the group process is started – usually with some paper-and-pencil work, rating the Webside's most important dimensions along a scale. Alternatively, group discussions can be preceded by „collective surfing" on workstations prepared for all group members.

How good are Websites?
4.3 Website evaluation by pop-up surveys

The most practical way to find out about the structure of the audience of a Website and at the same time get an impression of the appeal and usability of the site is to conduct a survey which selects users at random directly from the site. This method does not require recruiting and is called

n-th visitor method,

Intercept, or

pop-up test

Intercepting Visitors

Pop-up-Test

Scripts in source text call up questionnaire for each n-th visitor.

Following Page

Following Page

Startpage — 1 ————————— 2

Pop-up Quest.

Following Page

Following Page

Following Page

3

4 — 5 Exit page of Visitor

Possibility 1:
Questionnaire appears 30"+ after visitor has entered the startpage

Possibility 2:
Questionnaire is placed on high traffic or otherwise important page

Possibility 3:
Questionnaire pops up only when visitor has left the site

When to start a pop-up

Four different types of pop-up questionnaires:

a) On entry with timer
b) With early exit
c) On exit without timer
d) On exit with timer

All four types are available with or without confirmbox

a) Q pops up after delay period at 0:45 into visit

Delay time 0:45

b) Q pops up either on end of delay period or - if visitor leaves before that - on exit of visitor.

Minutes on site

1:00   2:00   3:00   4:00

Required visit time 2:20

c) Q is displayed on exit of visitor - regardless when exit occurs.

d) Q displayed after minimum visiting time of 2:20

POP UP-Test: Profile

Demographics

- Gender
- Age
- Occupation
- Education
- Region

Target groups

- Frequency of Use
- Consumer Habits
- Shopping on the Web
- Customized Questions for Client

„Profiler"

Pop-up Test: Appeal

Past

Reason for use
Frequency of use

Present

Requirements ←→ Performance

Future

Probability of
future visits

„Insite"

The 8 most important dimensions of a Website

Dimensions rated twice along a scale from 0-10:

„Performance" („How good is the Website in question ?")
„Relevance" („What should be the quality of such a site ?")

- Information
- Topicality
- User friendliness (navigation)
- Optical appearance (design)
- (Loading) speed
- Emotional appeal („sympathy")
- Personal/professional use
- Entertainment   Example see next slide !

Average Ratings of FESSEL-GfK Site

	Info	Topicality	Profess.-Use	Navig.	Loading time	Design	Appeal	Entertain-ment
Relevance	9,2	9,1	8,7	8,3	8,2	6,2	6,0	3,
Performance	6,6	7,0	6,8	6,5	6,9	5,3	5,8	3,
Relaunch	7,2	7,3	7	6,5	7,5	6,2	6,4	4,6
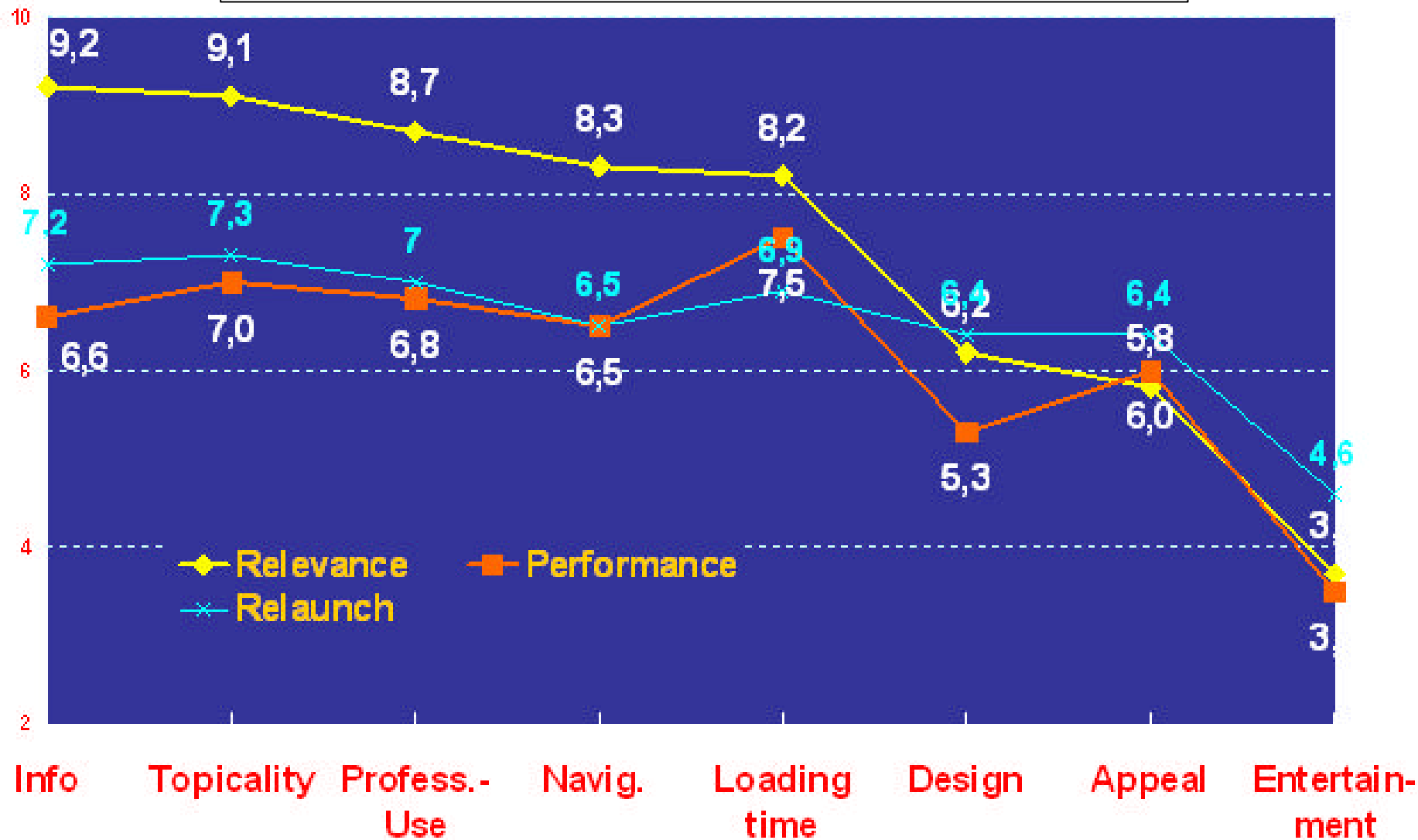
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The relaunch improved information and general appeal while some loss of experienced loading speed could be measured

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How good are Websites?
4.4 Quantitative CAWI Research

Quantitative Website Evaluation:
Web based interviews make it possible to explore the opinions of a sample representative of the Internet universe (of a country or of a special target group) about a client's Web site and those of his competitors.

Websites are opened by clicking on thumbnail images or other hot links. After examining existing or planned Web sites, respondents comment on them and rate their properties along a scale (cf. pop-up test) .

Research VIA the Web

Research VIA the Web

The „real" chances of online research lie in using the
Internet as a <u>tool of general market research</u>.

With more than 50 % of adults in some countries using the
Web, market research via the Internet becomes an
interesting option. Just as in conventional research
there are two ways:

1. Quantitative applications
2. Qualitative applications

1. Quantitative applications

„CAWI" surveys for special target groups, especially groups with high „Internet affinity", such as:

- Youth studies (85 % of Western teenagers use the Web)
- High-tech target groups (PC-owners, mobile phones etc.)

- Customer-provided samples (employee studies, customer satisfaction surveys, tourist samples)

- On-site exhibition surveys (sometimes already using *mobile Internet access* by mobile phone or palmtop PC)

- Concept tests, copy tests, sound sample tests etc.

Surveying with CAWI: „Pool" or „Panel"

Recruiting by phone

Address „Pool"

E-Mail

Respon-dents

ID+PW

Portal in WWW

User „Panel"

Question-naire

All kinds of surveys

Server
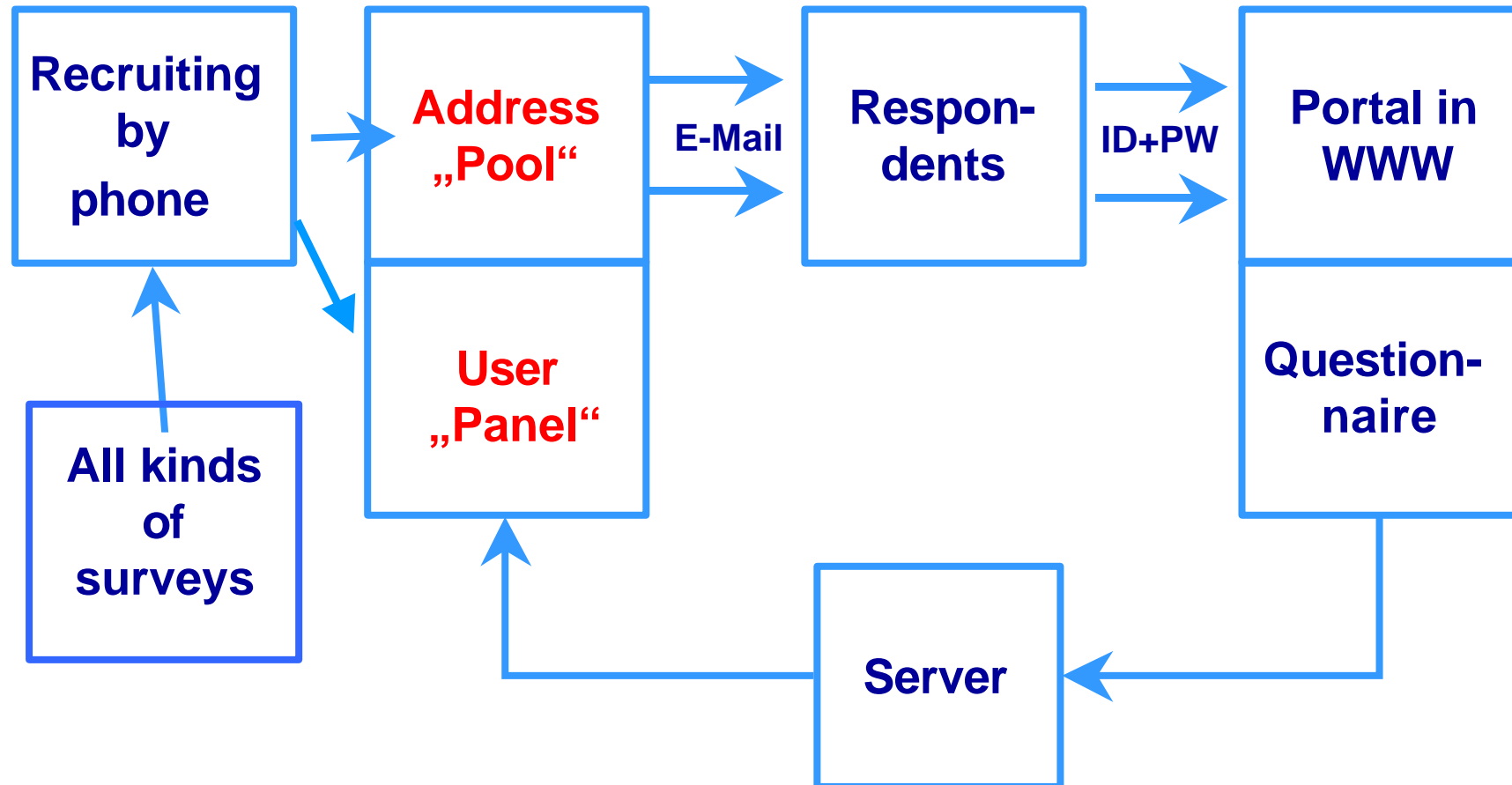
Pool vs. Panel

Many agencies and research firms offer services based on „panels".

One should be careful to distinguish between

„address list" (often only self-recruited e-mails),

„address pool" (sometimes also referred to as „access panel" - allowing surveys on a truly representative basis), and genuine

„panel" (a continuously attended sample)

2. Qualitative applications:

Online Focus Groups

One of the most interesting applications of the Internet is using a „virtual room" for conducting a group discussion. Although sophisticated (American) software is available, interest in Europe is still quite low.

Advantages:
- No geographical boundaries/experts reached better
- Online focus groups produce more opinions within a shorter time. Statements tend to be franker.
- Transcripts are available minutes after the discussion
- Clients can participate from their own office.

Disadvantages:
- Not all Internet users can type fast enough
- „Physical stimuli" (smell, touch) cannot be used
- „Body language" (e.g. facial expressions) is missing.

Online Focus Groups

Model of Online Focus Group

On the basis of a rented software service 8 people discuss on the Web led and prompted by moderator.
Cost: approximatelx $ 700.-/group

cf.: http://www.vrroom.com

Technician operates from N.Y,

New Beetle

"Whiteboard"

Paul
Mary
John
Bill
Bird
Jolly

focus group members

save

This button produces a perfect chat protocol

Mod: What features must your car have?
Paul: I prefer cars with a lof of security features regardless of cost
Mary: For me a car must be flashy

Here you can see what everybody in the group writes

Client can observe discussion and convey suggestions to Moderator

==> For me a car must be flashy and show pep

Mary just writes ...

Before the group discussion starts participants assemble and chat in a special "Waiting Room"

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Online In-Depth-Interviews

Online focus group software can easily be used for
one-to-one explorations in cyberspace.
Specially trained interviewers „talk" to one person at a
time via the Web in a special type of „chat room".
Virtual interviews are basically the same as in „real life".

Advantages:

- There are no geographical limits – e.g. hard to reach
  experts can be interviewed anywhere, anytime
- Respondents speak out more frankly, produce more copy
- Full transcripts are available minutes after the interview
  for processing and analysis.

Disadvantages: cf. Online Focus Groups

Moderated Bulletin Boards

Unlike focus groups (where opinions are collected simultaneously), bulletin boards are used to collect statements from respondents over several days.

Each (second) day the moderator summarizes what participants have contributed and confronts respondents with new questions. Thus a „thread" of opinions develops which can become quite voluminous.

Bulletin Boards are used chiefly in cases where specialist views are to be collected: experts can choose their own time of answering and need not be available at a specific hour.

Example see next slide !

Example of Moderated Bulletin Board
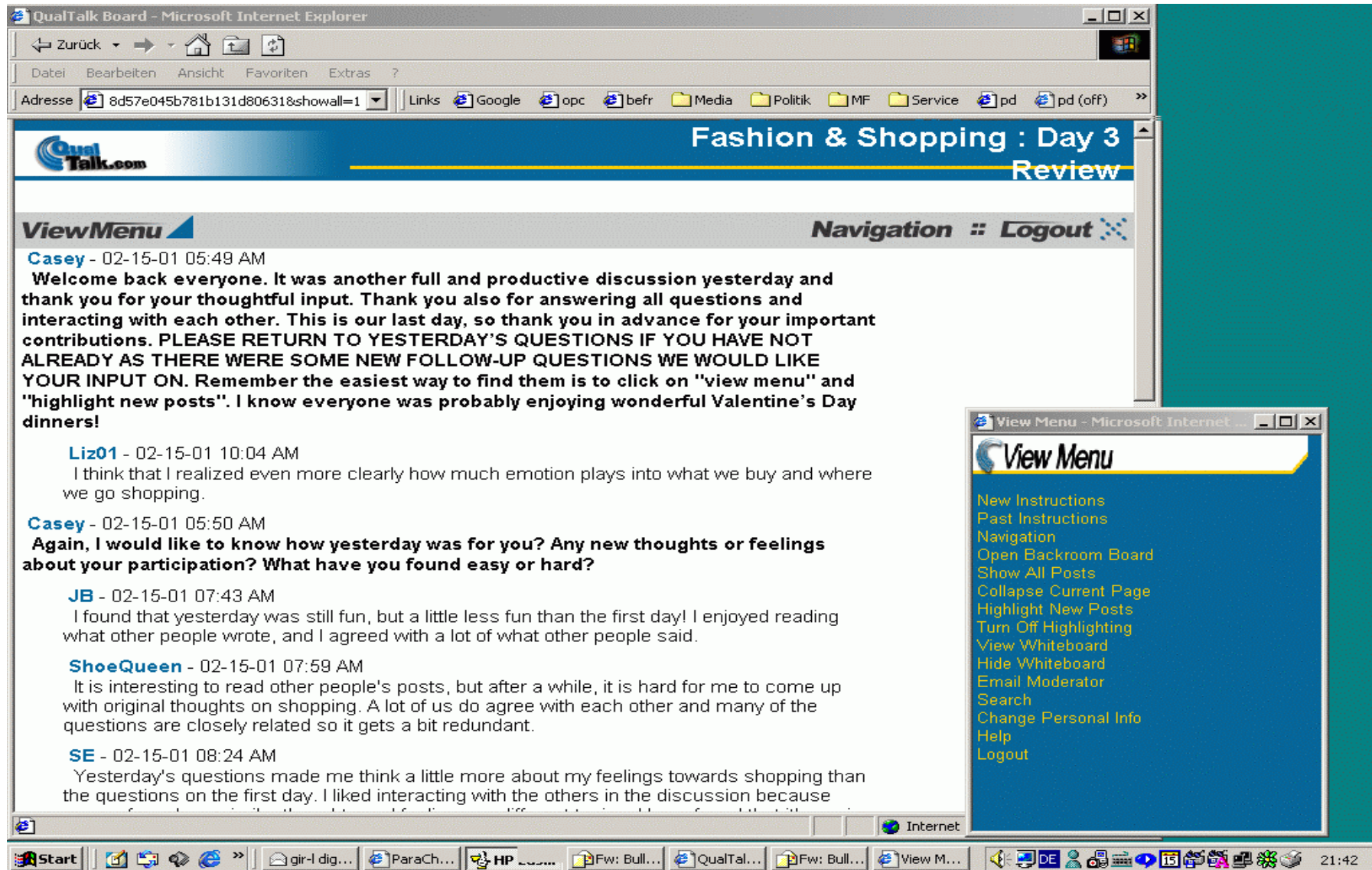
Summary: What is so special about Online Research?

1. Nationwide - even global - access to respondents
2. No telephone/interviewer/printing/mailing cost
3. No cost for printing and distributing questionnaires
4. Ease of editing questionnaire, speed of fieldwork
5. Multi-media stimuli (text, image, sound, video, HTML)
6. Direct contact with respondents (no interviewer bias !)
7. Easy processing of answers to open questions (*verbatims)*
8. Online evaluation and online reporting
9. Cost efficiency (prices → at 80% of CATI surveys)
10. Creates modern image for institute and client
11. No transcript writing with focus groups/bulletin boards
12. Hard to reach persons accessible regardless of domicile

Note: Online Research is not a substitute of, but a
supplement to, conventional market research

Interesting Links

http://ch.jupitermmxi.com/home.jsp   http://de.jupitermmxi.com/home.jsp
http://nielsen-netratings.com
http://www.netvalue.com   (Meter panels)

http://www.firm.no
http://www.domestic.at
http://www.nebu.nl   (Survey Software)
http://www.1by1.com
http://www.rogator.de

http://www.qualtalk.com   (Bulletin Boards)
http://www.vrroom.com
http://www.spin.de   (Online Focus Groups)

http://www.gfk.de

http://www.gfk.at   Online Research DE/AT)

http://www.integral.co.at

http://www.gor.de   (German Society for Online Research)
http://mediaresearch.orf.at/internet.htm   (ORF Media Research/Web)

FESSEL-GfK Online Research Products

1. **Continuous Internet Monitor** ✦	5. **Pop-up Tests** ▰
2. **Internet Monitor Business** ✦	6. **Qualitative Webtest** ▰
3. **CAWI Monitor „Special"** ✦	7. **Quantitative Webtest** ▰
4. **Austrian Internet Radar** ✦	8. **CAWI ad hoc Surveys** ★

✦ Internet Penetration/Reach   ▰ Website Evaluation   ★ Market Research via Web

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