Web-Based Consumer Research Surveys: An Essential Addition to the Undergraduate Marketing Curriculum

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ABSTRACT

This paper provides an overview of the emerging trend of using electronic or Web-based surveys to provide marketing research data. Constraints facing researchers who elect to employ these newer techniques are presented as a preamble for designing an approach to properly introduce electronic surveys into the research tool section of an undergraduate marketing class. Suggested uses beyond a traditional marketing curriculum are noted.

INTRODUCTION

Mention the desire to conduct a consumer- or business-focused survey in marketing circles today and someone will immediately ask whether or not the survey is being conducted online. Electronic surveys are becoming so popular that many large corporations are turning to this sub-classification of studies to provide the majority of research answers needed to stay in tune with consumers. Generally, executing surveys "online" will simplify a number of the logistical steps undertaken by the researcher. Nevertheless, it must also be stressed that use of the Internet for consumer research presents an entirely new set of challenges of which many seasoned research professionals may not be fully aware.

Students entering the marketing workplace after receiving their undergraduate degrees are likely to encounter Web-based survey techniques in use across a broad range of real-world research situations. Unfortunately, many undergraduate marketing programs, particularly those that confer a two-year degree, limit discussions of survey techniques to the familiar mail, phone and mall intercept procedures that have formed the backbone of the industry for decades. Incorporating the study of Web-based survey designs into the undergraduate marketing curriculum will greatly increase the ability of marketing students to compete effectively in their chosen careers.

Students enrolled in the Marketing program within a two-year Business Technology (BTE) program at Miami University (Miami of Ohio) have, for a number of years, been exposed to traditional survey techniques and customarily participate in mail survey research projects each semester. The skills acquired have meshed well with the expectations of local and regional employers who hire BTE graduates at the end of their programs. As a higher percentage of local and regional businesses move to establish a presence on the Web, however, BTE faculty have received numerous requests for assistance in setting up online customer databases, handling customer satisfaction issues over the Internet and moving time-consuming, manual research efforts to Web-based approaches. The drive to incorporate Web-based survey techniques into the BTE Marketing curriculum is thus driven not only by a desire to keep students abreast of the latest research trends but also to provide the practical skills that are in demand today.

USING WEB-BASED SURVEY TECHNIQUES

Web-based surveys introduced into an undergraduate marketing class should be designed to help students develop basic application skills. Typical research problems may include preference testing between two or more products, opinion research on potential advertising concepts or general research on consumer attitudes and lifestyles. Specific objectives to be achieved at the student level are:

1. Develop a basic understanding of the procedures for conducting a survey over the Internet and conducting a survey through traditional mail, phone or intercept means.
2. Be able to use and apply common Web-based survey software packages, like automated, personalized e-mail software and automated data retrieval software designed to eliminate manual tabulation of incoming results.
3. Learn how to assist marketing professionals in the interpretation of data outputs from Web-based surveys.

During the present semester (Fall, 2002), three different Web-based surveys are being fielded within the BTE program at Miami University. Two out of three surveys involve consumer attitudes regarding specific new BTE programs that are planned for introduction over the next academic year while the third survey is designed to capture general consumer needs and wants regarding undergraduate two-year business programs in general. These three surveys, collectively, are serving as important "test mules" for the teaching modules on Web-based surveys currently being incorporated into the BTE 105 Introduction to Marketing course. Initial feedback from both students and faculty shows a highly positive response to the "online" surveys. Response rates are not yet official, but early indications show a higher rate of survey return than that experienced by other departments using a similar content, but mail-based, survey design.

WEB AND INTERNET SURVEYS: CONSTRAINTS FACING THE RESEARCHER

Inherent in teaching students how to execute electronic surveys is the process of helping them differentiate between the proper use of direct Web or Internet surveys and e-mail surveys that are individually sent to pre-selected recipients. Web and e-mail surveys are often lumped together for purposes of discussion. These technologies are, however, actually distinct with each offering its own advantages and challenges to a skilled researcher. Fortunately, the choice of which technology to apply customarily may be made based on the need of the researcher to reach either a general or a carefully-selected population—provided that the population of interest is known to use e-mail and the Internet.

According to research conducted by Don Dillman over a 20 year period, Internet and e-mail users are not quickly migrating to a single set of universal hardware, software and connectivity standards (Dillman, 2000, pp. 357-358). Such standards would potentially make it much simpler for the researcher to design survey questionnaires and data capture regimens that work in exactly the same manner on each individual computer system. Software is similarly limiting. Questionnaire designs are thus often forced to fit the "lowest common denominator" in terms of hardware and software configurations in order to ensure the highest accessibility for respondents.

Dillman's research also indicates that the design of questionnaires and other survey materials for Internet and/or e-mail use requires some additional considerations not normally of concern in traditional paper-based surveys (Dillman, 2000, pp. 358-373). One of the simplest concerns, and also one of the most often overlooked, is the process of navigating through and responding to a series of questions presented on a computer screen as opposed to on a traditional sheet of paper. Dillman notes, surprisingly, that some people will become frustrated when they attempt to click on any underlined text and it turns out not to be a hyperlink (Dillman, 2000, p. 359). Conversely, other people will "forget momentarily that they are operating a computer" and continue to read right past hyperlinks and other branching instructions, or even forget to hit "Reply" to an e-mail survey before trying to fill in their responses (Dillman, 2000, p. 359). While these situations are easily prevented by a little more attention to up front details on the part of the researcher, failure to do so can cause potential survey participants to quickly become non-participants due to the frustrations encountered. Mick Couper, Michael Traugott and Mark Lamias investigated how many of these parameters truly can affect the response rate of Web surveys under a variety of conditions. Of particular concern to this group of researchers were survey participants who began in good faith to complete an electronic survey, but then abandoned it part way through for any one or a number of reasons (Couper, Traugott and Lamias, 2001, p. 231-232). Although results were hard to quantify reliably, these researchers found a positive correlation between the rate of abandonment and the complexity of the survey screens—particularly when survey designers placed so much on-screen that respondents needed to scroll excessively to read and respond to questions.

A particularly good overview of other common constraints, along with current thinking on how to manage the survey process, is given by Zeki Simek and John Veiga in their comprehensive work on organizational surveys (Simek and Veiga, 2001, pp. 218-235). Generalizing their comments to move beyond organizational surveys and into the world of marketing research is not difficult and this work is highly recommended as a guide for researchers who have already decided to move their work to the Internet. Based on all summary of the authors' work, researchers should keep in mind the following bulleted list as they begin the process of designing surveys specifically to be placed online:

- Common sense rules regarding good question design, survey layout, etc., still apply.
- Selection criteria for the desired sample population can proceed as usual, but the researcher must then ask whether or not the earmarked participants are reachable by electronic means.
- Electronic surveys of any type require extra consideration when it comes to their appearance and the means through which participants will record and transmit answers. Extra care is needed in this area in order to produce a functional survey that is easy to answer on as broad of a range of computers as possible.
- Personalization of the invitation to participate is just as critical for electronic surveys as it is for traditional paper-based surveys. The use of "listservs', "bcc's" and other mass-mailing techniques over the Internet should be avoided in favor of personalized invitations to the participants' private e-mail addresses.

- Electronic surveys can generate very good response rates because of their ease of use—provided that they are well designed. To assist in achieving the highest possible response rate, always give participants an "out" if they encounter difficulties while trying to complete the survey. In many cases, it is sufficient to provide an address where participants can mail a copy of the survey if they encounter problems and elect to print the questionnaire and fill it out by hand.

Finally, follow up is every bit as important to the success of electronic surveys as it is to traditional mail surveys. Personalized e-mail alerting participants to an upcoming survey, a quick note at the top of the survey introducing the study, a phone number and/or e-mail address for questions, a reminder copy of the survey sent at an appropriate later time and an electronic "thank you" note, perhaps with a small gratuity such as an electronic coupon, all can help to generate the best possible response rate.

WORKING WITH STUDENTS TO DESIGN ELECTRONIC SURVEYS IN MARKETING AND BEYOND

When incorporating any form of electronic survey into an undergraduate marketing class, it is imperative to make sure that students first have a basic understanding of how to generate simple mail or phone interview survey questionnaires. Students who are familiar with basic research survey design issues and the layout of an easy-to-follow questionnaire can concentrate more readily on the unique challenges of executing an electronic survey without needing to master research fundamentals at the same time. Students should be instructed in how to set up the electronic survey using a straightforward software package (SumQuest and StatPac both work well at the undergraduate level) and then given the opportunity to pre-test and "debug" the questionnaire thoroughly before actual use. It is also advantageous to cover the design and roll-out of survey questionnaires as a separate topic that is distinct from the tabulation and analysis of data that are returned by respondents. While the two topics do go hand-in-hand, data analysis is best taught in conjunction with basic survey statistics and the procedures commonly used to draw meaningful conclusions from an analyzed data set.

Electronic surveys, whether in Web-based or e-mail formats, are applicable in a broad range of situations that range well beyond traditional marketing/consumer research studies. The principles covered here are equally relevant to management or organizational surveys, engineering surveys covering product design or defects, or many other topics. As long as the desired survey population has access to and uses computers on a regular basis, carefully designed and executed electronic surveys can offer high quality information in a timely manner.

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