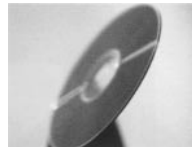


marketing research

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software review

Do-It-Yourself Internet Surveys

Web survey software for business and academic support.

By Ken Deal

While questions are still being asked about the properties of Internet survey samples, the benefits of using the Web for marketing research have firmly established it as one of the key portals to respondents. Several software developers have devoted their attention to providing applications that consultants, clients, and students can use to develop Internet questionnaires. If the software user has a server and the technical expertise, the complete Internet survey process can be handled internally. Many of the application development firms also provide survey hosting services that can be purchased with the software bundle or separately.

WebSurveyor is one of several available applications designed for allowing individuals to develop survey questionnaires suitable for conducting Internet fieldwork. This review is not meant as a comprehensive comparison of several Internet survey development products nor as an endorsement of WebSurveyor as the best of these products. WebSurveyor first caught my attention when it came packaged with one of the main marketing research textbooks I received recently from a publisher. Shortly thereafter, a representative from the firm contacted me, and the review developed from that discussion. There are several other products that promise similar features. Many of these can be located easily through a directed Internet search.

For successfully developing Internet surveys, application software should have at least the following minimal capabilities: (1) direct and simple facilities for developing appropriate, flexible, and attractive questionnaires, (2) relatively easy Internet fielding of the questionnaire, including security and integrity controls, and (3) the ability to perform attractive basic analysis, produce graphs, and export the data for further analysis.

I've found that WebSurveyor adequately performs these basic functions and provides an easy and flexible way to develop and field Web surveys. I found myself in a continual state of not expecting that WebSurveyor would perform a task and then being pleasantly surprised that it provided those functions with an understated capability. My doubts slowly disappeared as I used the program over several weeks. There were only a few instances where improvements would have helped the process.

Developing a flexible, appropriate, and attractive questionnaire. My first step was to challenge WebSurveyor to reproduce a public sector client's questionnaire from two years ago that included a variety of questions. This was a survey conducted for the New

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York Independent System Operator (NYISO) to help develop electricity demand reduction programs that reduce the likelihood of peak load emergencies. I'm grateful to Dave Lawrence at NYISO for permitting the publication of this questionnaire segment.

Exhibit 1 Final format of a questionnaire segment

Electricity Demand Response Programs

13) We would like to know how well you understand each of the following features of the Emergency Demand Response Program (EDRP). P

	No Understanding	2	3	4	5	Full Understanding
How the CBL (Customer Ease Load) is calculated?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
When you would be notified of an opportunity for curtailing electricity usage?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The amount that you would be paid for curtailing electricity usage?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
When you would be paid for curtailing electricity usage?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

14) When you signed up for the Emergency Demand Response Program (EDRP), how much electricity usage did you anticipate being able to reduce and/or self-generate when notified of an EDRP emergency event?

Anticipated kW reduction

Anticipated % reduction

15) When is the hourly usage of electricity in your business highest? (Rank highest usage period as 1 & lowest as 4.)

1)

2)

3)

4)

Thank you for your input on this important topic.

Previous Page Submit Survey (7 of 7)

Exhibit 1 shows three questions that illustrate a grid rating set of four items in question 13, two data boxes in question 14, with question 15 asking the respondent to rank four alternatives using pull-down menus.

It was easy to enter these questions into WebSurveyor and put them in an understandable and relatively pleasant format. It only took a few minutes to open the program and set up these questions. A new user could enter WebSurveyor, fumble around without reading a manual, and produce a credible representation of a questionnaire within a maximum time of one half hour.

The survey development process begins, of course, with opening the application, choosing “new,” and then selecting from a help window whether you want to open one of your recently developed surveys, create a new survey, open a sample survey with data, take a tour, or access help to get started. A user can start the new survey based on several templates that relate to common topics such as customer satisfaction, consumer needs, and HR employee satisfaction. Each of these templates produces a set of several starter questions that are typical of each genre. While each template of sample questions needs to be expanded for almost any survey development, this process gets the user into a basic usable platform as quickly as could be expected. Several background design formats are available for the questionnaire pages, such as the notebook pattern shown in Exhibit 1.

A wide assortment of question types is available, such as “select only one (show all),” “select only one (pull-down menu),” “numer-

ic value,” “select only one matrix,” “rank order,” and others. A “data block” question format allows for more than one entry of text or numeric information by the respondent in two or more boxes. These are convenient, but the entry box for the question wording is very constricted and longer questions cannot be seen at one time for editing. This data block format is used for constructing constant sum questions as well.

Skip patterns and functions. One necessary hurdle of any questionnaire development application is to provide easy construction of skip patterns. My first pass through the application did not lead me directly to the process for directing the questionnaire flow around inappropriate questions based on an earlier answer. WebSurveyor’s deceptively simple help process quickly informed me that skips are implemented through page breaks. This didn’t make sense at first, but did very quickly.

There are two types of page breaks in the application: simple and conditional. The simple page breaks literally just breaks to a new page wherever the break is place. The conditional break asks the user to provide the logic for skipping to further questions and around unnecessary components.

For example, WebSurveyor allows users to add a conditional page break to skip to question 10 if the respondent answers “yes” to question 1. A different skip path can be linked to each of several answers to a question. The logic seems to accommodate most, if not all, needs for negotiating from each answer to the next appropriate question.

A toolbar in the left margin of the standard window is handy for moving among the several program features, from “survey editing; to “survey management” and “survey results.” Rearranging the questions in a survey should be easy and flexible. The upward and downward pointing arrows in the right margin of the screen move questions to positions earlier or later in the questionnaire, respectively.

As mentioned earlier, WebSurveyor allow the questionnaire designer to select from several response format templates. These are very handy. Even more valuable is the ability to save custom made rating scales to the ratings template for repeated use in the same or later surveys.

Multiple language versions of a questionnaire are allowed. Predefined survey text and messages are provided in the languages page. However, these are only in English. While full translation capabilities are too much to hope for, it should be possible to provide the translations in several languages for phrases such a “Go to next question,” “You must select at least one of the following options,” “You must enter a value in the following field,” and others that are frequently used in surveys. The designer working in more than one language will construct these templates of commonly used phrases in the languages used most often.

As the questionnaire design is nearing completion, the designer has increasing need to test the questionnaire for readability,

phraseology, flow, skip patterns, response options, and general feel and usability. WebSurveyor provides a “preview” option that can be used any time during the survey. The questionnaire appears on the computer screen as it will on respondents’ screens when accessed over the Internet. The preview feature forces the designer to step through the complete questionnaire. I would like to see an additional feature where the developer can enter the preview at any question and then exit at any point. A spell checker is included as a helpful tool.

Easy Internal fielding, including security and integrity. When fielding the survey, there are two procedures available: do your own server administration with WebSurveyor Intranet or have WebSurveyor host your survey on their Web site (i.e., the WebSurveyor Hosted Service).

When ready, the designer publishes the survey with a simple “publish” command from the WebSurveyor bar or from the “view” pull-down menu. This command uploads the questionnaire and allow the designer to give the survey a name that becomes part of the unique URL for that survey on the WebSurveyor server. After that stage, anyone can link to that URL and take the survey. This is very handy for putting the questionnaire through a trial where the developer and several others can challenge the performance of the survey. At the end of the pretest, the data can be accessed and a set of graphs and tables produced. When the final survey is about to go live, these pretest records need to be deleted.

Of course, this trial period signals the need for security. Having an open unprotected survey on the host server can lead to a variety of abuses ranging from non-qualified respondents to

multiple completions by an individual. WebSurveyor provides the facilities to import a mailing list of respondents, generate and assign passwords, and send e-mail invitations to participate in the survey.

Security options appear to be comprehensive. The developer can limit incoming responses to “Allow only one response for each e-mail address,” “Allow only one response for each IP address,” and three other levels of restriction. Combined with password protection, these options should provide adequate security, but each user needs to fully understand the protection needed by the client and provided by the software.

Basic analysis, graphs, and data export. Users can download completed survey responses at any time from the server. After downloading, they can perform various analyses within WebSurveyor, produce various graphs, alter as desired, and copy them to PowerPoint or Word.

The analysis section provides graphical output of the data for each question. A chart toolbox allows developers to change the style and information provided on each chart. Very conveniently, the effects of these changes are seen immediately without first having to close the chart toolbox. The control over the appearance of charts is very flexible and complete. A text table can be viewed instead of a graph. The charts can be exported individually or in total to either the clipboard, Word, or PowerPoint. The multi-page PowerPoint file is immediately produced for viewing and further editing.

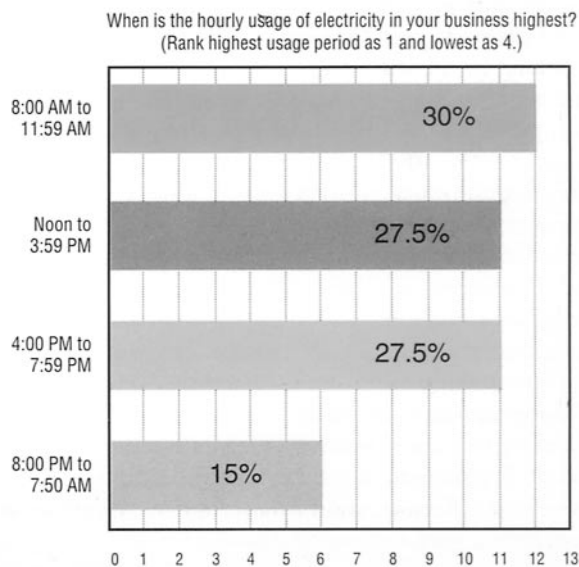
The only problem encountered was with formatting of the chart. It would be more convenient if font type, size, aspect ratio, and other features could be formatted in WebSurveyor and then exported. However, this is nitpicking since I was very pleasantly surprised by the charting features.

The study data can be exported in CSV format, which is fairly flexible. The data can then be opened by Excel, SPSS, and other statistical applications.

One limitation is that the value labels, rather than the numerical values themselves, are exported. This default data format results in string variables in the exported file. This can be avoided when constructing the responses to each question by assigning a numerical export value to each response. The exported data file will then contain numerical output for the questions treated in this manner.

Another minor irritation is that the complete text of the question is exported as the variable name. The designation of the variable name can be changed in WebSurveyor before exporting the data. While the string variables can be replaced with their numeric equivalents, this additional work should be avoidable. It would be helpful if the data, including variable labels and value labels, could be exported in a wider range of formats. Perhaps the developers could integrate a translation utility such as DBM/COPY in forthcoming version.

Exhibit 2 A small pretest



Overall Assessment

In summary, I'm very pleased with the feel and functionality offered by WebSurveyor. It passed my key three requirements for Internet survey software. The development, management, and support staff at WebSurveyor seem knowledgeable, patient, responsive and very helpful. There are several levels of accounts, including single three-month Now accounts that will run one survey at a time for a quarterly fee of \$449, Pro accounts that can accommodate one running survey at a time for a fee of \$1,500 per year, or Pro accounts that can run five accounts concurrently for an annual fee of \$3,600. One survey can be swapped out and another substituted to stay within the survey limit. Enterprise customers can have hundreds of surveys running simultaneously for higher fees. An entry-

level student account is available for \$49.

While WebSurveyor seems to be a highly capable and credible product in the Web survey software market, I'm fairly confident that competitors offer fairly similar features in their products. I am aware, however, that there has been a fair amount of turnover of firms in this sector. It will be worthwhile to investigate several of these products and the corresponding backup services before purchasing. ●

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