

Conducting Web-based International Research

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Abstract

Using the Internet to conduct market research has taken-off like wildfire in the United States due to its promise of quick results and lower costs. However, conducting similar web-based studies overseas is a bit more complicated than translating the questionnaire and reissuing the survey. In addition to translations, one must take into consideration such things as adequate sample, biases based upon who has access to the Internet, cross-cultural interpretation and norms, and Internet laws that may affect how research is conducted in each country.

To become true global leaders, companies must go beyond their borders to understand all of the customers of their products and services, not just those that are convenient to survey. Conducting International market research has traditionally been a time-consuming and cost-prohibitive venture that was only affordable by few. Over time, worldwide adoption of the Internet will make it easier for market researchers to seek input from customers in remote locations throughout the world.

We are in a time of transition. The worldwide adoption of the Internet progresses at varying rates. Though web-based research technologies show great promise, they are not without limitation. Conducting web-based International research is not as easy as translating a questionnaire and emailing invites out to a cast of thousands. In addition to translations, one must take great care to ensure that the populations to be surveyed are adequately represented by Internet Users; that translations stand up to accurate, cross-cultural interpretation; there is an acknowledgement of local norms; as well as adherence to Internet laws that vary from country to country.

Conducting web-based surveys

Web-based surveys follow the same basic steps as other types of market research surveys, in that they require you to:

- Identify whom you would like to survey
- Write screeners, questionnaires, and invitations
- Recruit participants to take the survey
- Collect data from the participants
- Analyze data
- Summarize and report results
- Administer incentives or gratuities.

Each step has its own set on concerns when addressing an international audience.

Demographic Coverage – Not all groups are adequately represented on the Net.

Effective survey research must be based on a sample truly representative of the universe of interest. Each member of the universe must have an equal random chance of participating in the survey. Since not everyone throughout the world is on the Internet, great care must be taken in determining whether the specific population to be studied is adequately represented on the net for a web-survey to be a viable tool by itself or if other methods of data gathering are more appropriate.

According to Nua.com, an online source for information on Internet demographics and trends, approximately 513 Million people were online as of August of 2001, with the highest concentration of over 181 Million Internet users located in Canada and the United States. In Northern Europe, Internet use is at or exceeds U.S. levels, whereas in Southern Europe, Spain, Portugal, Italy and Greece, use is low and based in urban areas. It is important to note that Internet usage and access varies significantly by country and is constantly changing, so it is prudent to check the latest Internet Usage statistics before engaging in a web-based study. CyberAtlas.com is one source of current statistics on the world's online populations.

Here are some interesting examples current usage statistics...

Conducting a study of small businesses?

If so, you may want to try a web-survey in the United Kingdom, where 98 percent of businesses are online. *PFA Research*

On the other hand, conducting the same survey in Belarus won't get you far since only 5 percent of Belarusian Internet users are entrepreneurs, businessmen or managers. *Belarusian embassy*

Likewise, only 39 percent of smaller manufacturers in New Zealand use the Internet. *Employers & Manufacturers Association (Northern)*.

Conducting a study of housewives?

What if you would like to better understand consumer preferences of family household products primarily used by women?

No problem conducting a web survey in the United States, where according to Nielsen NetRatings, women now account for 52 percent of home Internet users.

However, only one-quarter of Internet users in Morocco are women and 61 percent are single according to a study by IEC Marketing.

Less than 1 percent of Belarusian Internet users are housewives. *Belarusian embassy*

And in China, women now account for 40 percent of all Internet users. *South China Morning Post. 2001*

Who is the “typical” Internet user?

Across the world, the “typical” Internet user is most likely to be white, male, between 20 and 40 years old, well-educated, and wealthy...

The average Internet user in Morocco is a single man between the ages of 21 and 35. *IEC Marketing.*

Statistics Canada found that Canadians who use the Internet tend to be younger, and have higher incomes and more education than those who don't. Men in Canada use the Internet more than women.

Academic users account for more than half of the Internet users in Hungary where the average age of a Hungarian Internet user is generally 20 to 25 years old. *Emarketer*

Fifty-seven percent of Czech Internet users are male, 25.2 percent are in their twenties, and 38 percent have completed secondary education. *GfK.*

Seventy-eight percent of Saudi Internet users are male, and most are aged between 24 and 31. *The China Post*

Internet users in South Africa are more likely to be white, male, aged between 20 and 40, well-educated, and high-earning. Only 5 percent of the total population has Internet access. *The Department of Informatics at the University of Pretoria*

Catering to a younger crowd...

Testing a consumer product intended for those over 50? International Web-based research may *not* be the right tool to use to reach this demographic...

Statistics Canada found that nine out of every 10 teenagers aged 15 to 19 reported using the Internet at some time in the 12 months prior to the survey, the highest proportion of any age group.

According to the UK Office of National Statistics. Eighty-eight percent of those aged between 16 and 24 have been online, in comparison with 11 percent of those over the age of 65.

Just over half of Internet users in Argentina are more than 35 years old. Thirty-two percent are aged between 25 and 34, and 18 percent are under 24. *D'Alessio IROL*

In Korea, teenagers and children use the Internet more than any other age group, and students go online more than those in any other occupation. *Korea Network Information Center.*

Regional representation? Most International Internet users are found in Metro-areas.

Though the Internet may provide easier access to people in rural areas of the United States, this is not necessarily true in other countries. In fact, most Internet users in other countries are concentrated in cities due to limitations of the country's IT infrastructure.

A study released by the Belarusian Embassy found that most Belarusian Internet users live in the capital city of Minsk.

Statistics Canada found that people living in rural Canada were less likely than urban dwellers to go online.

In China Internet users remain concentrated in major cities such as Beijing and Shanghai, and the provinces of Jiangsu, Zhejiang and Guangdong. *South China Morning Post. 2001*

In Argentina, the majority of Internet users, both at home and in the office are located in the capital, Buenos Aires. *D'Alessio IROL*

Infrastructure Woes:

Many countries are severely hampered by the lack of adequate telecommunications infrastructure to access the Internet. Until these issues are resolved, their rate of adoption of the Internet will be slow.

The expansion of Cuba's online population is severely limited. The island has only one phone line for every 23 Cubans, power outages are common, and computer modems are difficult to obtain. The general consensus among Cubans is that future Internet access will be restricted to public cyber-café's rather than private homes. *Chicago Tribune*

According to the Yankee Group, the barriers to Internet growth in Bulgaria and Romania are low household incomes, and slow deregulation of telecommunications.

Aging infrastructure is holding back Australia. Only 73 percent of Australian Internet home and work users have modem connections of at least 28.8kbps, in comparison with 80 percent in the US, 90 percent in the UK and almost 100 percent in Canada. In some rural parts of Australia, only 60 percent of Internet users can go online at 28.8kbps or faster, although this is twice as many as could in 1998. *Productivity Commission, an Australian government body*

There are currently no broadband subscribers in Colombia, Peru, Venezuela and most of the rest of Latin America... *Dataquest*

...and Bolivia, Paraguay, and Peru lack basic fixed-line infrastructure. *Yankee Group*

In Belgium, the high cost of telecommunications and insufficient local Internet services and information remain a major stumbling block. Half of the Belgians who have access to the Internet do not make use of it on a regular basis. More over, one in three never use it. *InSites*

Writing Screeners, Surveys and Invitations

Ok, so you have found a population that is adequately represented by Internet users to warrant an international web-based study, and you would like to conduct a study similar to one that you've just completed in the States...

First you will need to find a native speaking translator to translate the written screeners, invitations and questionnaires into the preferred language of the locale to be surveyed. Though English is considered by many to be a universal language, it would be perceived by many cultures as arrogant and rude to conduct a study in American English in someone else's homeland.

Be careful of literal versus contextual translations. For instance, in the office products industry, a piece of paper caught within the machine is often referred to as a "paper jam" and if translated literally may inadvertently end up as "paper marmalade" in a different language.

Pay attention to details; do not assume that American English can be substituted for the Queen's English, or that Canadian French is the same as European French, or that Brazilian Portuguese is the same as European Portuguese. There are subtle nuances within each language that can greatly affect the interpretation and effectiveness of your study within that country. Did you know that a "Sweepstakes" in the U.S. is a "Draw" in the U.K.?

Unique to web surveys, error messages provide feedback to the survey participant as they take the survey. Again, it is important to make sure that all of these messages have been properly translated. There's nothing more frustrating than to have an error message pop up that is undecipherable and prevents you from completing the survey! Don't forget to translate Sweepstakes Rules and other supporting documentation.

Recruitment - So you've identified whom you are going to study, now how are you going to contact them?

In the States, you have several options for obtaining contact lists ranging from using customer lists in business-to-business studies, to renting mailing or phone lists from subscription companies, to renting access to email lists from list brokers. However access to this type of information may not be available in other countries.

Mailing and Contact Lists are treated differently in Europe. In Europe, privacy is seen as a human right, which includes the protection of personal data. In the United States, if you do a transaction with a company in which personal data is disclosed, the company is then able to collect that information and later use it or sell that information to others.

Say you subscribe to a magazine. The magazine can sell or rent your name and everything it knows about you to a third party whom you don't know. In Europe, the periodical would have to notify its subscribers of its intentions, and then the customers have the right to opt out.

Rules about unsolicited email differ across the 15 European Union (EU) member states. For instance, several nations offer customers the "opt-out" of receiving unsolicited email, while stronger protections in the form of an opt-in clause, where the recipient chooses to receive such email, are mandatory in Austria, Denmark, Finland and Germany. The European Parliament is working to unify these laws across the EU.

So before you go off and purchase international lists, do your homework. Know how the list was created and whether the appropriate local laws were followed. Understand pertinent opt-in /opt-out laws of that area. If you pre-recruit via telephone, send the follow-up email invite as soon as possible afterwards, otherwise participants are apt to forget that they were initially contacted via phone and that they agreed to participate in the study.

Highlights of the EU directive:

Any data that can be linked to a specific person is covered. Areas most likely to be affected are human resources, accounting, Web commerce, European database info, and auditing data. More importantly, this affects mailing and email lists for recruitment of survey participants.

You can only use information for the original purpose for which it was collected unless you get the permission of the person or people involved.

People must be notified that information about them is being collected, how the information will be used, and be able to opt out if they so desire.

People must be allowed to correct erroneous information about them.

Data collection – Timing is everything

The questionnaire has been translated, the database has been programmed, and you are ready to go to field...

Before you do, make sure that you are aware of local holidays and vacation time that may impact your data collection plans. In Europe, it is customary to take the entire month of August off and travel on vacation. Conducting surveys during this time is not recommended. Conducting surveys over religious holidays is considered poor form.

Computer viruses know no borders, depending on the nature of the virus and the public reaction to it you may need to delay going to field until things calm down.

Data Analysis

You've achieved your quota and have completed collecting your data. If you included open-ended questions in your survey, plan to have the responses translated and transcribed by a native speaker.

Incentives

In the States, it is customary to give incentives for participation in a web-based study. Incentives often take the form of individual gifts such as money, hats, T-shirts, etc. or in the form of a sweepstakes where the participant has a chance to win a larger prize.

Using money as an incentive... Find out what the standard incentive amounts are in the locale being surveyed, instead of performing a straight conversion of a U.S. incentive into the local currency. In the States, individual cash incentives are often given in \$5 increments. For instance a typical incentive for participating in a 15-minute survey of business people might be \$20 or \$25. However it would be considered unusual to receive an incentive of \$17.35.

Try to give incentives whose brand is readily recognized in that region. A gift of an American Express Traveler's check may be recognized by Americans, or associated with Americans on holiday, but people in other countries may not view it as highly as an equivalent certificate from a regional company that they know well. You should also make sure that the type of incentive is appropriate. In some cultures it is considered rude to give money, and small gifts are more appropriate though harder and more costly to administer.

In many countries, Amazon.com gift certificates are welcome. Amazon.com is particularly popular in Germany, South Africa, Great Britain, Switzerland, France, Italy, and Denmark. Gift certificates are also very easy to administer across countries. Do your homework, and make sure that the recipient will view the gratuity as an incentive, not an insult!

About the Author

Karla Kuzawinski is the President of Karlamar Associates, LLC a full service market research firm in upstate New York.

Prior to starting Karlamar Associates, Karla worked for the Xerox Corporation where she managed "Voice of the Customer" market research activities in the Office Products Business Unit. During her 17 years with Xerox, she has held various positions in Advanced Technology, Product Development, Manufacturing, Product Planning and Strategic Marketing. Karla received a BSEE from the University of Rochester.
