

# **Internet Research Quality Guideline**

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**Factors To Be Modified or Protected  
With the Change of Times**

**November 2017**

**Japan Marketing Research Association  
Internet Research Quality Committee**

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# Introduction

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It has almost been 15 years since Web surveys became popular in marketing research. In the recent years, radical changes are taking place within the internet research environment through the widespread of smartphones.

However, internet researches that take place in the field are still administrated with the premise that they will be completed with PCs. Therefore a decrease in the rate of cooperation and response quality has began to become a concern. This is why JMRA (Japan Marketing Research Association) established an Internet Research Quality committee in August 2016, centralized on marketing research agencies that actually administrate internet researches.

We then formulated the “Internet Research Quality Guideline” in order to sustain Web surveys as a research environment and to continue to deliver high-quality research data to the client.

This guideline was formulated as protocols to be protected by researchers of research agencies. However, we also would like everyone who are in charge at the companies who commission researches to understand and cooperate with its content.

This guideline is not binding to the various members of JMRA. However, if all parties involved in research follow these guidelines, we can make a change in internet research that will improve its quality and hopefully lead to support the future of marketing activities by various companies.

November 2017

**Japan Marketing Research Association**  
**Internet Research Quality Committee**

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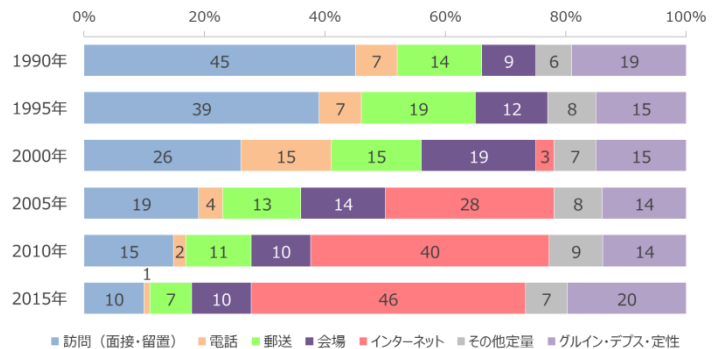
# Circumstances That Led to the Formulation of the Guideline & Its Significance

# Circumstances That Led to the Formulation of the Guideline & Its Significance

## Internet Research: An Indispensable Technique In Marketing Research

- Web surveys accounts for approximately a half of the sales share of the ad-hoc research market (as of 2016). Web surveys are also used in the recruitment process for qualitative researches such as interview researches and central location tests. It is the core system in marketing research in Japan.
- Since the early 2000's, Japan has had a high penetration rate of PCs. This combined with the construction of a large scale access panel advanced the permeation of Web surveys. These researches were based on the premise of PCs.

Sales Composition Ratio of Ad-Hoc Researches by Research Methods

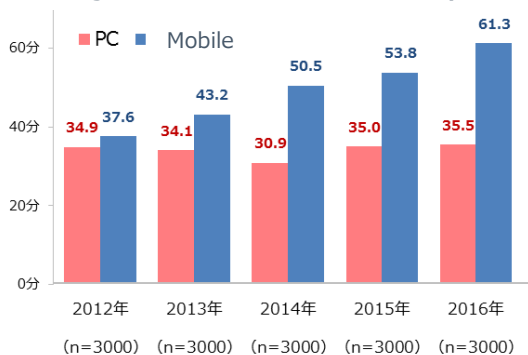


出所：日本マーケティングリサーチ協会「経営実態調査」

## Delay in Adapting to the Shift to Mobile Platforms

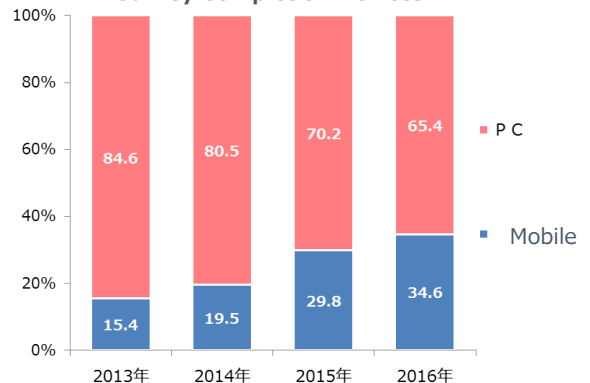
- With the increase of smartphones users around 2010, the way that consumers utilize the internet changed drastically.
- The main device that consumers use to access the internet switched from PCs to smartphones. There has been a gradual increase in the ratio of surveys completed with them.
- In this manner, there has been a shift in devices that consumers and respondents use to complete surveys. However, in reality, the designs of the questionnaires that are being commissioned are not sufficiently modified for smartphones.

Average Time Used on the Internet by Devices



出所：平成28年 情報通信メディアの利用時間と情報行動に関する調査 (総務省 情報通信政策研究所)

Survey Completion Devices



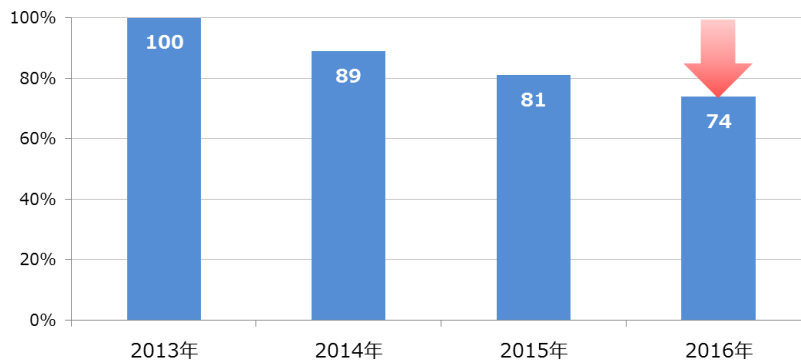
JMRA Internet Research Quality Committee Research

# Circumstances That Led to the Formulation of the Guideline & Its Significance

## Concerns Regarding Increasing Survey Workloads & Degradation in the Quality of Researches

- Unlike PCs, smartphone screens are extremely small and the amount of information that can be browsed at once is limited. As a result, it takes much more time to answer the same survey on a smartphone in comparison to a PC. Thus, the survey participant feels that the workload is larger and a heavier burden even when completing the same survey. This is triggering a decline in active panelists registered in the access panels of various research companies.
- If this decline in active panelists continues, the decline in cooperation rate and research quality for internet research is inevitable.

Active Panelist Rate With 2013 Defined as 100 (Average of the 5 Major Agencies)



※2013年10月のアクティブモニター率（登録モニターのうち、1ヶ月に1回以上アンケートを回答したモニターの割合）を100としたときの経年変化

JMRA Internet Research Quality Committee Research

## The Necessity of a Common Understanding Amongst All Researchers

- In addition to access panel surveys, there are other methods in finding research participants for internet researches such as those that utilize social media and river-sampling. However, no matter what method of Web survey is used, if it is not utilized correctly, its continuity cannot be expected.
- At the JMRA Internet Research Committee, we believe that we must reexamine the protocols for this research method called "internet research". Such accomplishments cannot be achieved by the effort of individual affiliated companies. It cannot progress without a shared common understanding amongst the whole research industry as well as those that commission researches.
- We formulated this guideline for all parties involved in marketing research in order to maintain high-quality and sustainable internet research.
- There is an important basis of research that is starting to be forgotten along with the diffusion of Web surveys. That is "to value research participants." Our hope is for everyone to remember this once more. This is why we have incorporated this concept as the core of this guideline's content.

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# Basic Policies of Internet Research

# Basic Policies of Internet Research

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- This internet research quality guideline consists of the following 3 parts.

A factor that should be protected no matter how times change.

## 1. Value Research Participants

A factor which must be modified according to the change of times.

## 2. Design Questionnaires That Make Research Cooperation Easier

### Reduction of Research Volume

~ Designing Questionnaires That Sustain Participant Motivation & Prevent Their Secessions and Withdrawals ~

## 3. Administrate Internet Researches That Are Well-Adapted to the Times

### Research Designs That Are Aware of the Devices That Are Used to Complete Them

~ Designing Questionnaires That Are “Well Conveyed” Rather Than Those That “Incorporate Every Question One Wants to Ask.” ~

- Amongst these 3 concepts, “1. Value research participants” must be a universal value that we must protect not matter how times change. “2. Design questionnaires that make research cooperation easier” and “3. Administrate internet researches that are well-adapted to the times” are concepts that must be modified with flexibility according to the changes that occur in the internet environment.



# Basic Policies of Internet Research

## 1. Value Research Participants

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- Internet research is impossible without the cooperation of participants. Research participants are valuable resources for the research industry. However, we would also like for those who utilize research data to acknowledge them as business partners who support the marketing industry as well.
- Research participants are not only answering Web surveys all day. They are general citizens that are taking a part of their precious time in order to cooperate with these surveys. Hence, caution is required of the following when requesting the cooperation of research participants.

- ① **Understand that internet research cannot be possible without research participants.**
- ② **Consideration towards the research participants' privacy.**
- ③ **Aim to pay honorariums that measure up to the survey workload.**



# Basic Policies of Internet Research

## 1. Value Research Participants

Guideline Target

Research Agency

Research Client

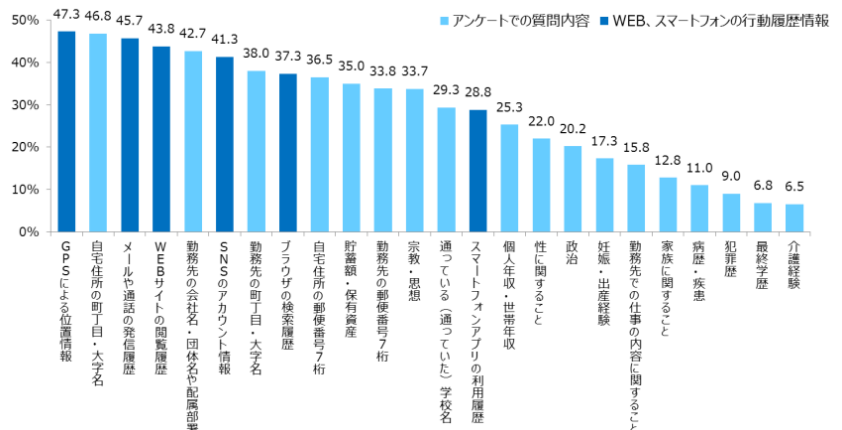
### ① Understand that internet research cannot be possible without research participants.

- What we refer to as big data, such as web logs and payment information, is data which is passively collected. Thus, there is no burden put upon the individual which is providing the information.
- On the other hand, internet research consists of collected data. The research data is a aggregation of the results of every research participant's agreement to cooperate, their time to read and think about every question presented in the questionnaire and each operation of the mouse or touch panel.
- Internet research is composed by the goodwill of each research participant. However, there is a limited number of them. Just one bad experience can trigger a respondent to never cooperate in a research ever again. In order to make internet research sustainable, we must always remember and keep in mind our gratitude towards research participants.

### ② Consideration towards the research participants' privacy.

- Ever since the enactment of the Personal Information Protection Law, there has been an increasing awareness towards the consumer's privacy. Those who plan researches should refrain from inquisitively asking questions that may be unpleasant to research participants.
- Private information acquired from surveys or behavior histories of smartphones must be appropriately handled in conformity to the Ministry or Internal Affairs and Communications' Smartphone Privacy Initiative (SPI).
- The protection of research participants must always be kept in mind and the handling of such private information must be done with sufficient care.

Questions that participants do not want to answer or behavior history information that they do not want to provide. (MA)



Research By Macromill Implemented in October 2017

# Basic Policies of Internet Research

## 1. Value Research Participants

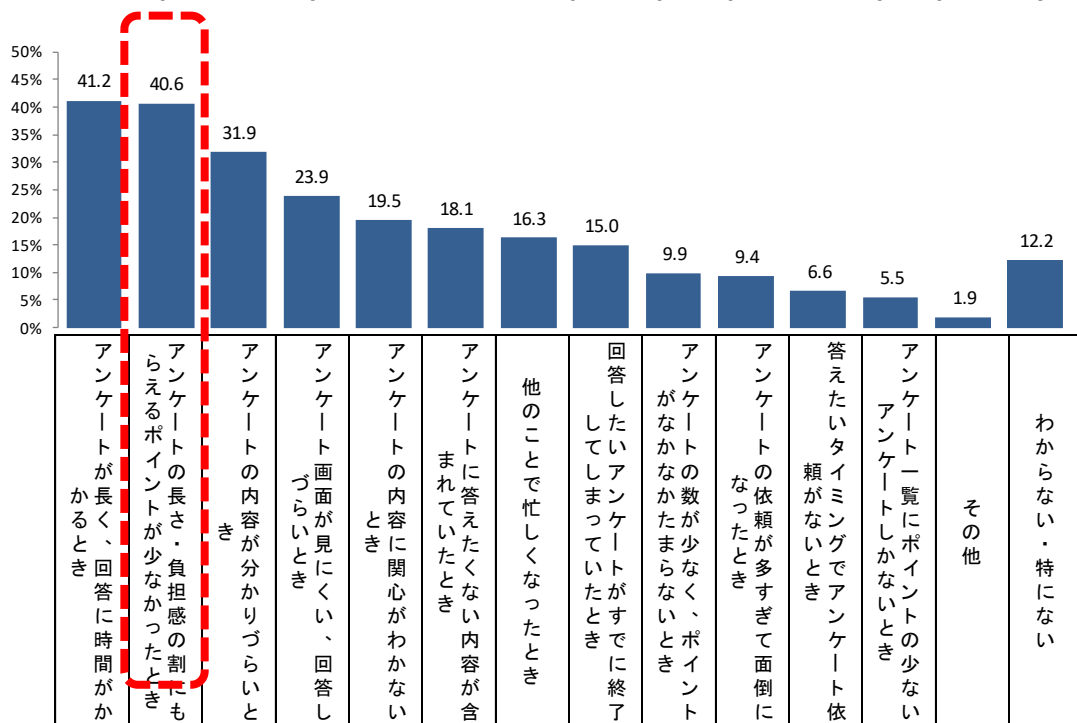
Guideline Target

Research Agency

### ③ Aim to pay honorariums that measure up to the survey workload.

- The research participant's willingness to cooperate with surveys is vitiated when they feel that the honorarium that they receive is less than the burden that took on in completing it.
- In order to sustain continuous cooperation towards researches, each research agency should be aware of the survey workload and set a standard for honorariums.

When do you feel that you do not want to cooperate/participate in surveys any more? (MA)



Research by Intage  
Implemented in  
September 2016

# Basic Policies of Internet Research

## 2. Design Questionnaires That Make Research Cooperation Easier

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### Reduction of Research Volume

#### ~ Designing Questionnaires That Sustain Participant Motivation & Prevent Their Secessions and Withdrawals ~

- Currently, the main means of internet access is shifting to smartphones, especially amongst younger generations. Due to the abundance of games, videos, social media and other various contents that can be enjoyed through the internet, there is a dispersion in people's interest. This is causing a loss in tolerance towards long surveys.
- Therefore, the following must be considered in order to design questionnaires that make research cooperation easier.
- The questionnaire must be considered as the greatest point of communication with research participants. We should strive to design a questionnaire that reduces their stress and allows them to stay focused until the end of the survey.

- ① **The recommended time required to complete a survey is under 10 minutes**
- ② **Refrain from the use of large matrixes**
- ③ **Refrain from frequent use of matrix formats and free answers**
- ④ **Refrain from questions that will not be used for extractions in screeners**



# Basic Policies of Internet Research

## 2. Design Questionnaires That Make Research Cooperation Easier

Guideline Target

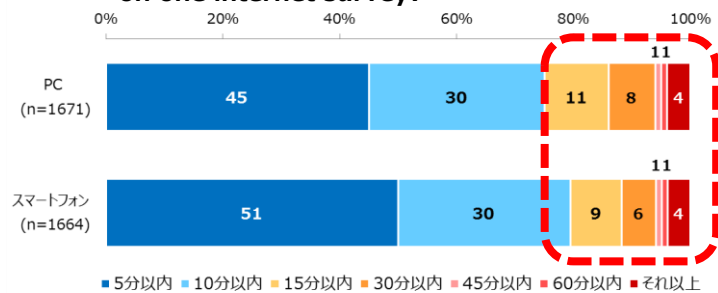
Research Agency

Research Client

### ① The recommended time required to complete a survey is under 10 minutes

- When you are registered to an access panel, there are cases where you receive multiple survey requests in a day. Survey participants are cooperating with researches with their valuable spare time. This excludes all the time that they spend at work, doing housework, taking care of their children, transportation, sleep and etc. Thus, participants cannot spend much time in answering surveys. Only 20% of active participants can answer surveys that take longer than 10 minutes.

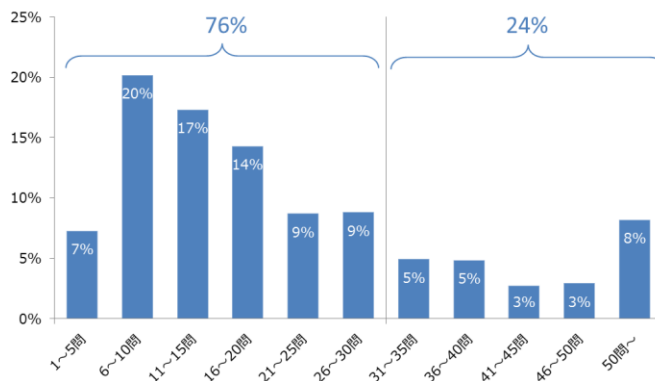
How many minutes are you willing to spend on one internet survey?



イメージ調べ

- In order to create surveys that more participants will complete, the research volume must be reduced. For this reason, questionnaires should be designed so that it should take less than 10 minutes to complete in one sitting.
- Estimating that participants can answer 3 questions per minute, the maximum number of questions that they can answer in 10 minutes is 30 questions. Based on this assumption, approximately 24% of the Web surveys that are administrated by JMRA members cannot be completed within 10 minutes. In order to improve the quality of internet researches administrated by the whole industry, the challenge at hand is to find a way to reduce the volume of the researches that fall under this 24%.
- If it is difficult to create a survey that can be completed within 10 minutes, we recommend dividing it into multiple surveys.

Ratio of Operational Performance Ranked by the Number of Questions



Research by JMRA  
Internet Research  
Quality Committee

# Basic Policies of Internet Research

## 2. Design Questionnaires That Make Research Cooperation Easier

Guideline Target

Research Agency

Research Client

### ② Refrain from the use of large matrixes

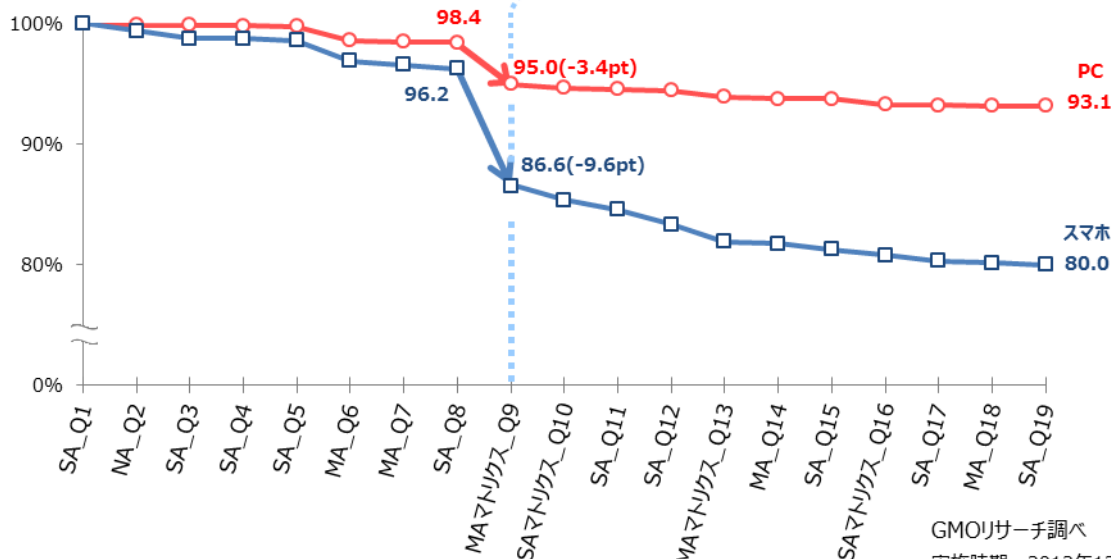
- Regardless of the device, matrix questions is the greatest factor that causes drop-outs. It is especially difficult to answer surveys that require the participant to scroll both vertically and horizontally on small smartphone screens.
- In order to prevent mistakes in answers and drop-outs from surveys, we should not design questionnaires that contain large matrix questions.

あなたは次の商品またはサービスの購入を検討する際、どのような情報を入力する必要がありますか。あてはまるものを全てお答えください。(各MAX)

※矩阵の質問もランダムに

	いつも決まっ たものも購入 する	店頭で実際に 見る	店頭での商品 説明	新聞	雑誌	テレビ番組	パンフレット	インターネット	フリーペー パー	友人・知人の 評判	その他	この商品・ サービスは購 入しない
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回答継続率



GMOリサーチ調べ  
実施時期：2013年12月  
対象者：男女20～89才

# Basic Policies of Internet Research

## 2. Design Questionnaires That Make Research Cooperation Easier

Guideline Target

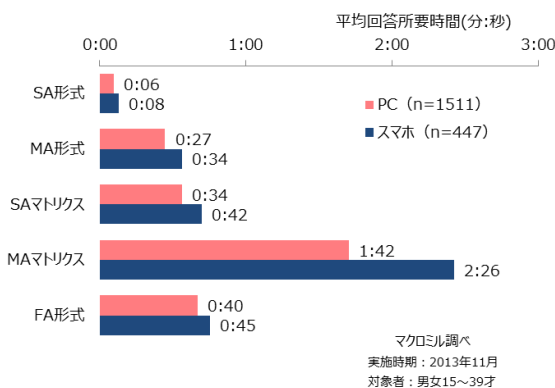
Research Agency

Research Client

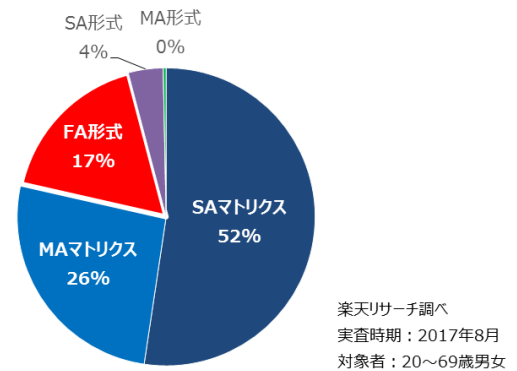
### ③ Refrain from frequent use of matrix formats and free answers

- Regardless of the device, matrix and free answer format questions create a high survey workload.
- It especially takes more time to answer matrix questions from smartphones because of the extra time it requires for scrolling and input.
- In order to avoid participants from dropping-out due to the accumulation of psychological burdens, we should not frequently use matrix and free answer formats.

Completion Time by Questionnaire Format and Devices (Average)



Ratio of Questionnaire Formats That Were Discontinued/Not Completed



### ④ Refrain from questions that will not be used for extractions in screeners

- In many cases for internet researches, screeners are administrated prior to the main research in order to extract target respondents from access panels. Since there are many screener requests, it is inevitable that a large number of the surveys that respondents answer are screeners.
- Many research agencies set the standard of honorariums for screeners lower than those for the main research. However in the past few years, the research industry as a whole has shown a tendency of an increase in the number of questions in screeners. The increase in such screeners that are not worth the honorarium and have a high survey burden is causing the deactivation and withdrawal of research participants.
- Questions that are not used to extract target respondents are to be asked in the main research. This is the fundamental rule. Researchers should refrain from including questions that are not used for the extraction of respondents in screeners.

## Basic Policies of Internet Research

### 3. Administrative Internet Researches That Are Well-Adapted to the Times

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**Research designs that are aware of the devices used to complete them.**

~ Designing questionnaires that are “well conveyed” rather than those that “incorporate every question one wants to ask.” ~

- ① Allow surveys to be completed on multi-devices
- ② Consider the environment that surveys are being completed in
- ③ Communication that correspond to device environments
- ④ Simple designs eliminated of excrescence
- ⑤ First try the survey yourself





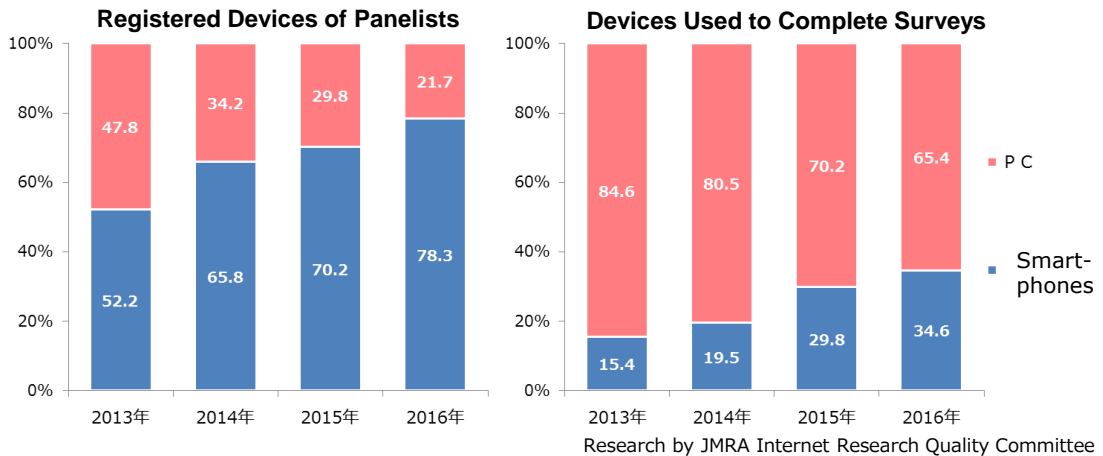
# Basic Policies of Internet Research

## 3. Administrative Internet Researches That Are Well-Adapted to the Times

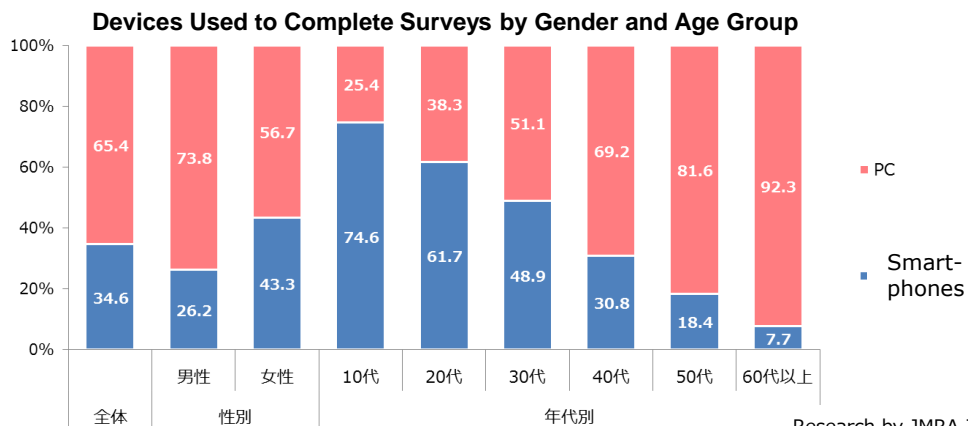
### ① Allow surveys to be completed on multi-devices

Guideline Target
Research Agency
Research Client

- The number of people who newly register to access panels with smartphones has been increasing annually. There is also an annual increase in smartphones as the device that participants use to complete surveys.



- Looking at the age groups along with the devices used to complete surveys, the younger the age group, the more likely that they are using smartphones. 75% of respondents that are under 20 are completing surveys with smartphones. On the other hand, respondents over 60 have the highest percentage in completing surveys from PCs. More than 90% of this age group are using PCs.
- The modality of utilized devices greatly differs depending on the age group. Thus, in order to obtain sufficient responses from a wide range of age groups, a research cannot be collected from only either one of the devices (PC or smartphones).



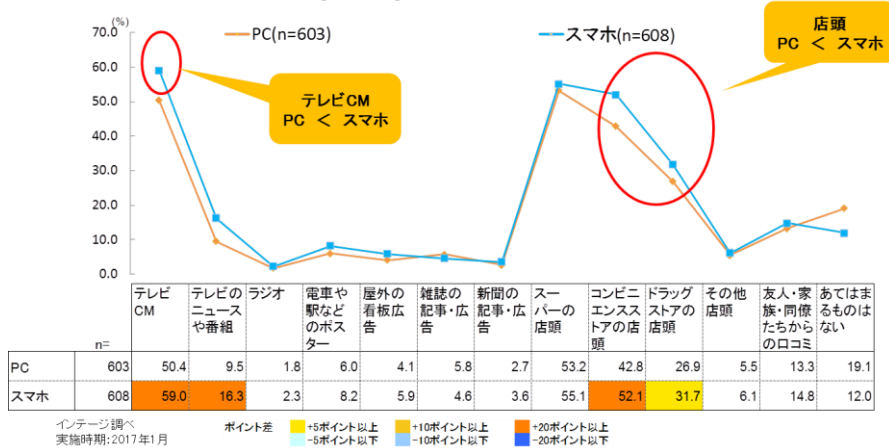
Research by JMRA Internet Research Committee

# Basic Policies of Internet Research

## 3. Administrative Internet Researches That Are Well-Adapted to the Times

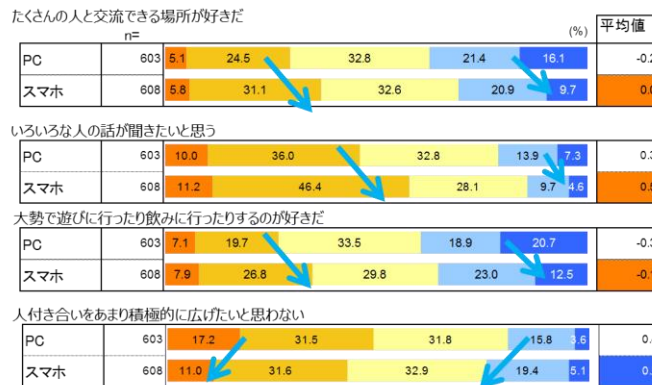
- Participants from the same age group tend to have different sensitivity towards information and consciousness towards interpersonal relationships and such depending on whether they prefer to use PCs or smartphones to complete surveys.

### Pipeline for Information Regarding Snacks



### Consciousness Towards Interpersonal Relationships

- あてはまる(2) ■ まああてはまる(1) ■ どちらでもない(0) ■ あまりあてはまらない(-1) ■ あてはまらない(-2)



- As you can see, limiting the access device for internet researches to either PCs or smartphones means that we can only comprehend the reality of a portion of the consumers that exist.
- A wide range of participants must cooperate in researches in order to accurately grasp the reality of the market. Therefore, there should be no limit to the access device.
- The distribution ratio of the research participant's access devices is a factor that changes with time. Thus, it should not be a fixed definite proportion. It is important to allow respondents to freely choose the device that they would like to use.

# Basic Policies of Internet Research

## 3. Administrative Internet Researches That Are Well-Adapted to the Times

Guideline Target

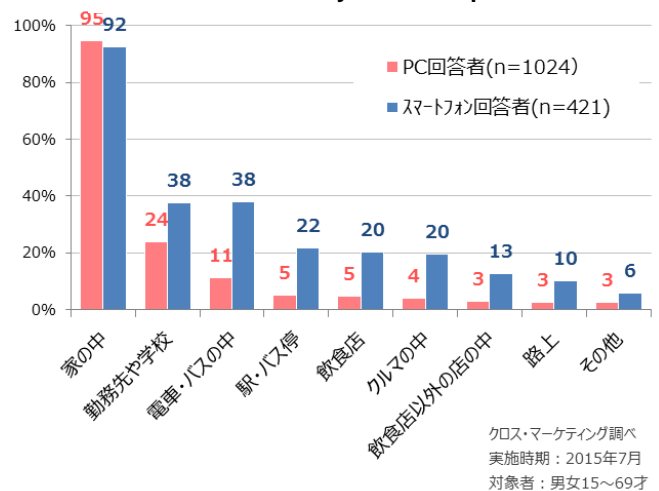
Research Agency

Research Client

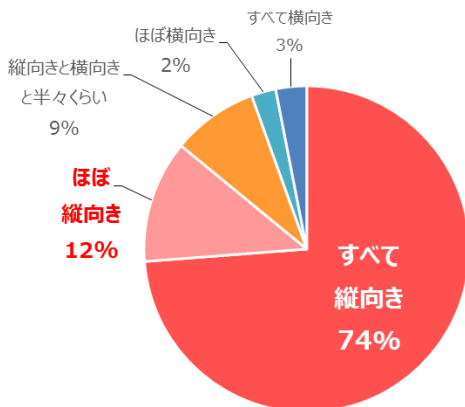
### ② Consider the environment that researches are being completed in.

- The contact point between consumers and researches is shifting from PCs to smartphones. Smartphones do not have any restrictions in time or place. This allows participants to answer surveys anytime and anywhere.
- Participants are answering surveys in their spare time while they are out and in an environment where surveys may be obstructed due to messages or forced termination of apps.
- We must understand that such participants will account for a large proportion of future researches and researches should be designed based on this premise. Internet researches require the understanding and adaptation towards changes in the internet environment.
- Future internet research and their questionnaires should be designed on the premise that there will be participants completing them from smartphones.
- Participants answering from smartphones typically are browsing vertically. We should not expect the participant to shift their smartphone horizontally to answer surveys.
- Future questionnaires should consider utilization characteristics. It is important that survey questions and multiple choices can be browsed and scrolled vertically.

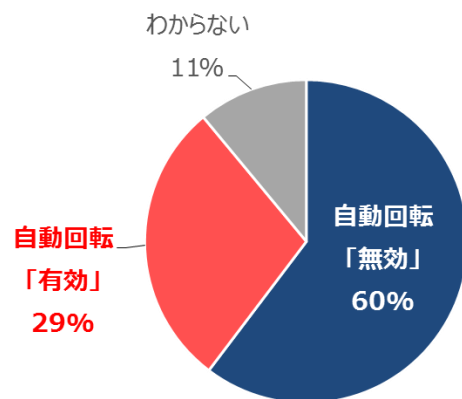
Places Where Surveys Are Completed



Position of Smartphone Screen on Surveys



The Automatic Screen Rotation Setting Status



# Basic Policies of Internet Research

## 3. Administrative Internet Researches That Are Well-Adapted to the Times

Guideline Target

Research Agency

### ③ Communication that correspond to device environments.

- Smartphones are the device that are always the closest to research participants. Researchers should refrain from sending late-night and early hour notifications that are unpleasant to participants.
- Due to the widespread of messenger apps, researchers can no longer send survey requests with the premise that only emails are sufficient. It is necessary to adapt to various methods of sending requests, such as push notifications and reminders.

Guideline Target

Research Agency

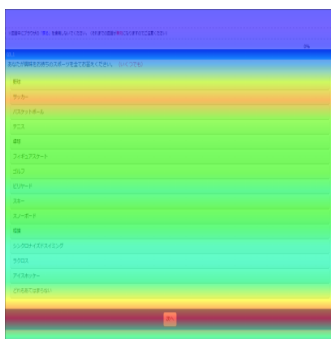
Research Client

### ④ Simple designs eliminated of excrement

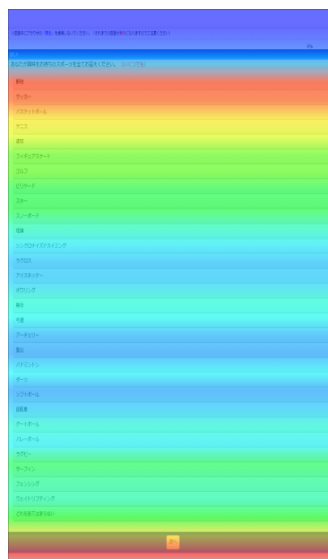
- In the small touchscreen of a smartphone, participants have to keep on scrolling if there are too many options and causes them to skip or skim through this information.
- In order to collect data with high-quality responses, researchers must consider and select choices based on priority rather than comprehensiveness.

What sports are you interested in? Please select all. (MA)

15 choices



30 choices



Heat Map

Representation of the respondent's visual axis retention time. Blue represents shorter browsing time.

Research by Cross Marketing

# Basic Policies of Internet Research

## 3. Administrative Internet Researches That Are Well-Adapted to the Times

- Writing long and thorough questions to make sure that the participant does not misunderstand the intent may reduce the area that displays the choices. Making the question concise within the realm that is not impolite will not affect the participant's answers.
- Researchers should try to keep questions as concise as possible.

**Polite and thorough wording: What are the important factors you consider when purchasing tea products? Please answer all factors**

**Concise wording: What factors are important to you when purchasing tea products?**



Research by Intage  
Implemented in January

**Guideline Target**

Research Agency

Research Client

### ⑤ First try the survey yourself

- Web surveys where many participants are interrupted/distracted and are not completed in one sitting cause distorted research results.
- We should not assume that a survey will be completed as expected because the participant is a member of access panel. This should not be taken for granted. The content must be that which can be completed by anyone.
- Once survey screens are completed, research planners and designers should check and try out surveys on not only PCs but also on smartphones from a participant's point of view before starting researches.

# (Summary)

## Basic Policies of Internet Research

### Factors to be modified or protected with the change of times

		Guideline Target
		Research Client
		Research Agency
Factors that should be protected despite the change of times	<b>1. Value Research Participants</b>	
	① Understand that internet research cannot exist without research participants.	✓ ✓
	② Consideration towards the research participant's privacy.	✓ ✓
	③ Aim to pay honorariums that measure up to the survey workload.	✓
Factors that should be modified & adjusted with the change of times	<b>2. Design Questionnaires That Make Research Cooperation Easier (Reduction of Research Volume)</b>	
	① The recommended time required to complete a survey is under 10 minutes.	✓ ✓
	② Refrain from the use of large matrixes.	✓ ✓
	③ Refrain from frequent use of matrix formats and free answers.	✓ ✓
	④ Refrain from questions that will not be used for extractions in screeners.	✓ ✓
	<b>3. Administrate Internet Researches That Are Well-Adapted to the Times. (Research designs that are aware of the devices that are used to complete them.)</b>	
	① Allow surveys to be completed on multi-devices.	✓ ✓
	② Consider the environment that surveys are being completed in.	✓ ✓
	③ Communication that correspond to device environments.	✓
	④ Simple designs eliminated of excrescence.	✓ ✓
	⑤ First try the survey yourself.	✓ ✓

# Conclusion

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- When questionnaire studies shifted from paper-based to internet researches with the premise that they will be answered with PCs, the methodology changed but the essence and nature of the questionnaire did not. Contrarily, once it was free of the restrictions of paper, the number of questions and matrixes increased and questionnaires progressed to become more and more bloated.
- However, now that times have shifted from PCs to smartphones, we are now confronted with the challenge as how to make these bloated questionnaires as compact as possible.
- The JMRA Internet Research Quality Committee fears that not only is there a danger of no future in internet research in Japan but also in marketing research as well if we do not resolve this. In order to make internet research in Japan sustainable, we require the understanding of all involved parties.
- The environment surrounding the internet is changing with each passing moment. The operation of internet research must be done with awareness towards the changes within its environment while protecting factors which should not be influenced by the times but also not fearing necessary modifications. Furthermore, when we face new challenges surrounding internet research, we must promptly revise this guideline as well.

(November 10<sup>th</sup>, 2017)

あなたの中に未来がある。

**JMRA** 一般社団法人 日本マーケティングリサーチ協会