

# Online Survey – October 2000

## Web Site Promotion Issues

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### INTRODUCTION

The survey was part of a project investigating how best to optimise web site promotional efforts (with an emphasis on SMEs) by studying:

- a) how Internet users find new web sites, and
- b) data collected by SME businesses with an online presence – showing what route visitors took to reach a web site (e.g. site log files).

However, nearly all the companies I approached claimed that either:

- a) they did not collect such data, or
- b) the data they did have was of such low volume (e.g. 1 or 2 page views per day or less), that it was statistically meaningless, or
- c) the data they had was confidential and could not be released to me.

A disturbingly large majority of businesses fell into the first two categories above.

Two different questionnaires were designed and published on the WWW, as a convenient and low cost means of soliciting user opinions on aspects of their online experiences.

### OBJECTIVES

The main purpose of the survey was to:

- i. find out how a given user sample perceives the relative effectiveness of different web promotion channels (User Questionnaire).
- ii. find out how a sample of users with practical marketing experience perceive the relative costs and the relative effectiveness of various web promotion methods (Business Questionnaire).

The survey was thus intended to support the main focus of the project – to determine which are the most effective promotional techniques – by soliciting users views on their own experiences. This information can then be compared with other published market statistics, and so perhaps identify any significant differences or further insights into the demography or perceptions of the different population samples.

It should be emphasised that the project survey was intended only as a small scale operation - since time constraints and other factors (e.g. cost and resources) made it impractical to conduct a more statistically rigorous survey.

## TARGET AUDIENCE

The main target was defined as mainly business users in the UK and Europe with experience of browsing the WWW, finding information, and possibly purchasing goods/services online. The questionnaire developed for this group is hereafter referred to as the 'Users' questionnaire.

Responses required: - about 100, but not critical for a preliminary study. This is equivalent to a mail-shot to 5,000 different people for a conventional paper questionnaire with a response rate of 2%.

A second more specific group of people was also targeted – those in business with experience of marketing online. The questionnaire for this group – called the 'Business' questionnaire from now on - was devised later on in the project, but due to the short time available, and uncertainties about questionnaire distribution and response rates, no target was set for the required response number.

## DISTRIBUTION

The questionnaires were published online at:

[www.consult-x.com/surveyform.htm](http://www.consult-x.com/surveyform.htm) (the 'Users' survey), and at:  
[www.consult-x.com/business-survey.htm](http://www.consult-x.com/business-survey.htm) (the 'Business' survey).

The Users survey was also made available at the two other experimental web sites:

[www.search-engine-max.com](http://www.search-engine-max.com) and [www.search-engine-booster.com](http://www.search-engine-booster.com) .

All of these web sites were new and had not yet generated any site traffic of their own, so other initiatives had to be used to persuade people to visit the main web site ([www.consult-x.com](http://www.consult-x.com)) and complete the forms online. These included postings to usenet Newsgroups, and emails to colleagues and small businesses.

## SURVEY RESULTS

### USERS QUESTIONNAIRE

A total of about 105 responses were received - reduced to 83 after removing duplicate submissions and a few incomplete or spoiled submissions. It appears most duplicates were sent in error, by people suffering from slow connections repeatedly pressing the submit button. No obvious 'spoof' entries were detected, and nearly all replies appear to have understood the instructions adequately (particularly for Questions 2 and 8), indicating an apparently sober and considered response.

QUESTION 1

*How did you find a web site that you can remember visiting recently?*

	Frequency	Normalised	Other Suggestions
Magazine	16	20	Radio
TV	2	3	Company Annual Report
Search Engine	30	38	Company letterhead
Friend	11	14	Guessed at URL
Newsgroup	6	8	IRC Channel
Link	6	8	
Banner	0	0	
Email	8	10	
<b>Total =</b>	<b>79</b>	<b>100</b>	

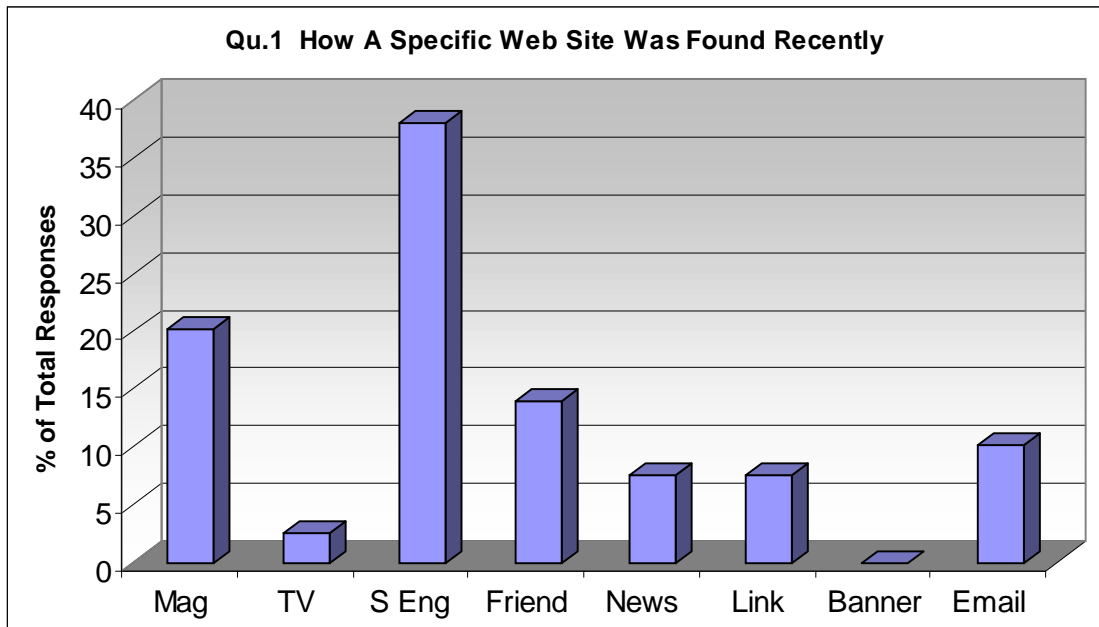


Fig. 3.1

QUESTION 2

*How useful are the following in helping you find new web sites?*

Results were scored 5 points for the 'Highest' rating down to 1 point for the 'Lowest' rating, with one point intervals in between (i.e. the inverse of the rating numbers shown on the form).

The arithmetic mean of all entries was calculated for each item, and used as an overall performance measure, on a scale of 1 to 5 for the degree of 'usefulness'. The variance (the square of the standard deviation) was used as an indication of how much individual scores varied for each item – the higher the variance, the more widely spread is the data. The total number of individual ratings received for each item are shown under 'Entries' – respondents were asked to leave blank those items they were unsure of.

Scored 1 – 5 (most effective).

	Mean Score	Variance	Entries	Other Suggestions	
<b>Magazine</b>	3.19	1.96	73	Postal flyer	3
<b>TV</b>	1.99	1.17	72	Radio	3
<b>Search Engine</b>	4.27	1.04	79	Trial & error	4
<b>Friend</b>	3.48	1.28	73	Own needs	5
<b>Newsgroup</b>	2.77	1.96	64	IRC Channel	5
<b>Link</b>	3.46	1.08	78		
<b>Banner</b>	1.72	0.70	69		
<b>Email</b>	2.87	1.82	76		

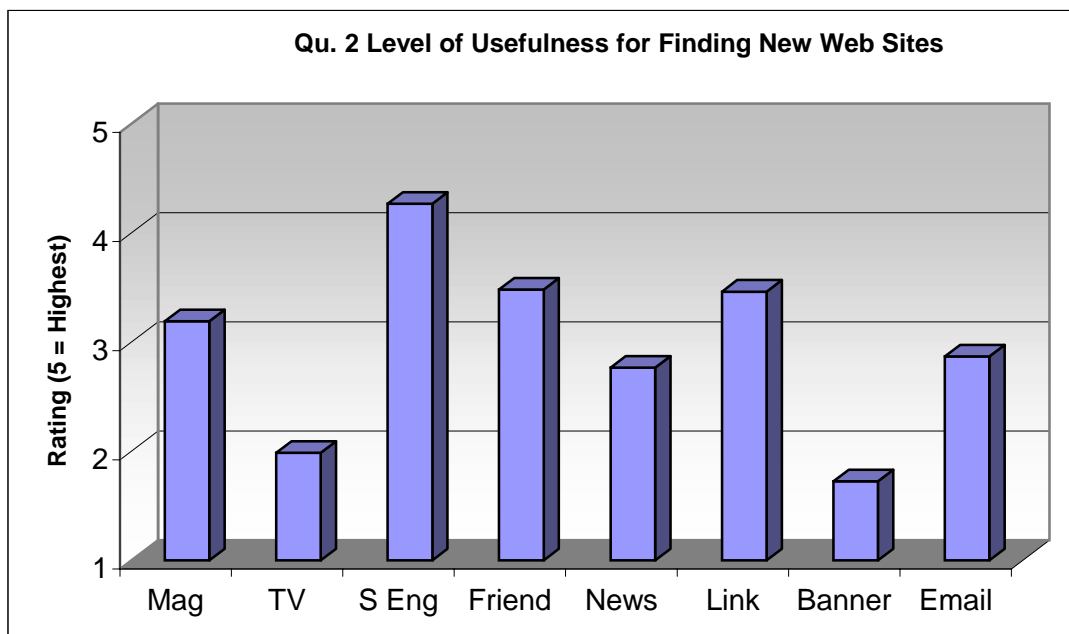


Fig. 3.2

QUESTION 3

How many hours per week do you spend actively online?

Hours/Week	Frequency	Normalised
<1	6	7
1 - 3	14	17
4 - 6	10	12
7 - 9	8	10
10 - 12	12	15
13 - 15	9	11
16 - 18	3	4
19 - 21	3	4
22 - 24	3	4
>24	14	17
<b>Total =</b>	<b>82</b>	<b>100%</b>

**Approx. Mean = 8.6 hours/week**  
(Excluding >24 hrs/wk group which is 17% of sample).

Note: bar widths in the chart below are all equal and do not relate to the number of years in each class.

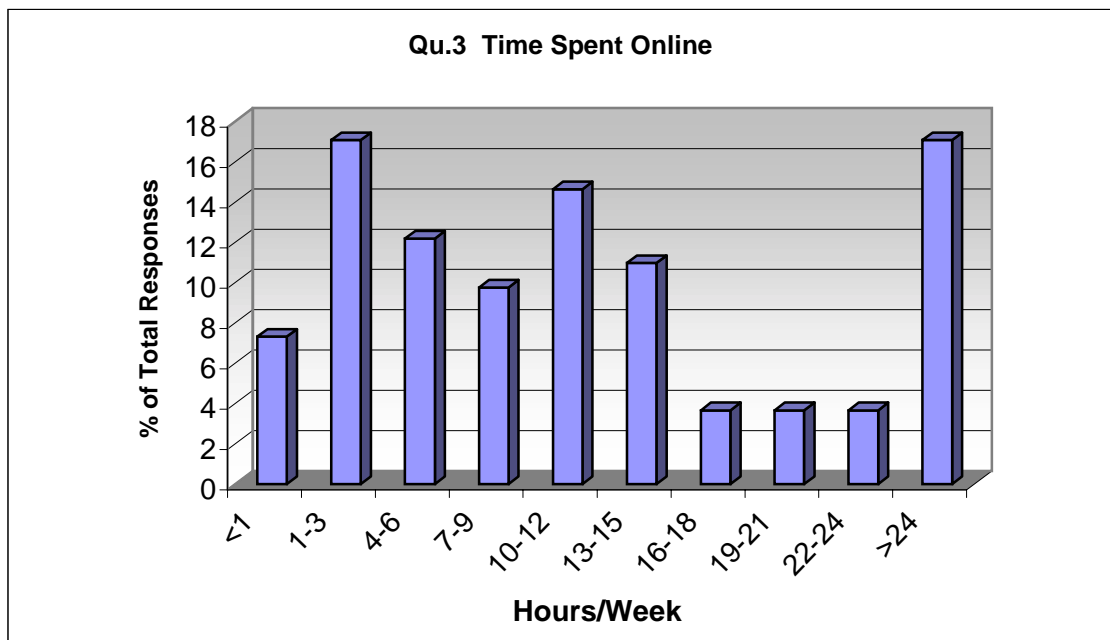


Fig. 3.3

QUESTION 4

What percentage of your time online do you spend actively searching?

% of Total Time	Frequency	Normalised
0 %	0	0
1-15 %	25	31
16-30 %	26	33
31-45 %	8	10
46-60 %	8	10
61-75 %	5	6
76-90 %	3	4
>90 %	5	6
<b>Total =</b>	<b>80</b>	<b>100%</b>

**Approx. Mean = 32.4%**

Note: bar widths in the chart below are all equal and do not relate to the percentage range in each class.

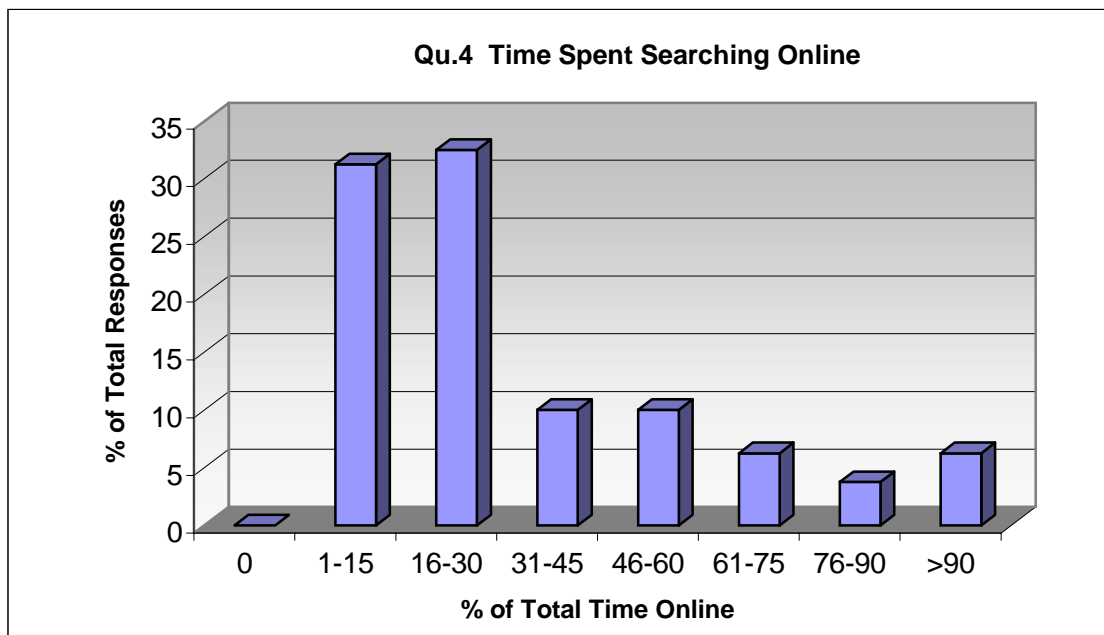


Fig. 3.4

QUESTION 5

What percentage of your searches online are successful?

Success Rate	Frequency	Normalised
0 %	0	0
1-15 %	4	5
16-30 %	12	15
31-45 %	7	9
46-60 %	10	12
61-75 %	19	23
76-90 %	22	27
>90 %	7	9
<b>Total =</b>	<b>81</b>	<b>100</b>

**Approx. Mean = 60.4%**

Note: bar widths in the chart below are all equal and do not relate to the percentage range in each class.

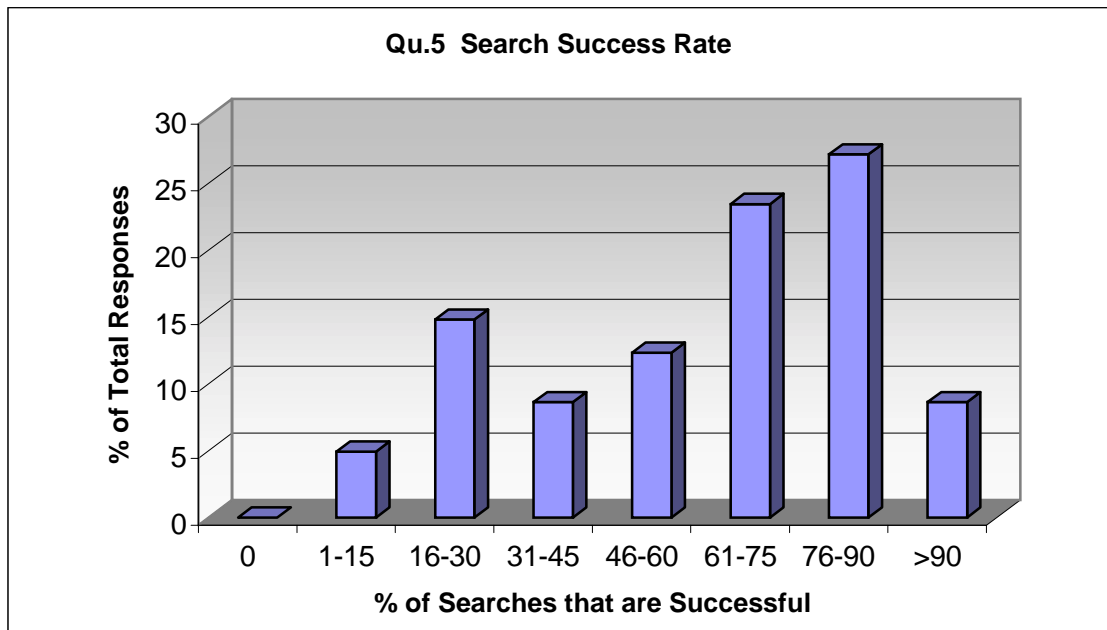


Fig. 3.5

QUESTION 6

*What percentage of your time online is for business use?*

<b>% of Total Time</b>	<b>Frequency</b>	<b>Normalised</b>
0 %	2	2
1-15 %	9	11
16-30 %	5	6
31-45 %	6	7
46-60 %	8	10
61-75 %	12	15
76-90 %	24	29
>90 %	16	20
<b>Total =</b>	<b>82</b>	<b>100</b>

**Approx. Mean = 63.1%**

Note: bar widths in the chart below are all equal and do not relate to the percentage range in each class.

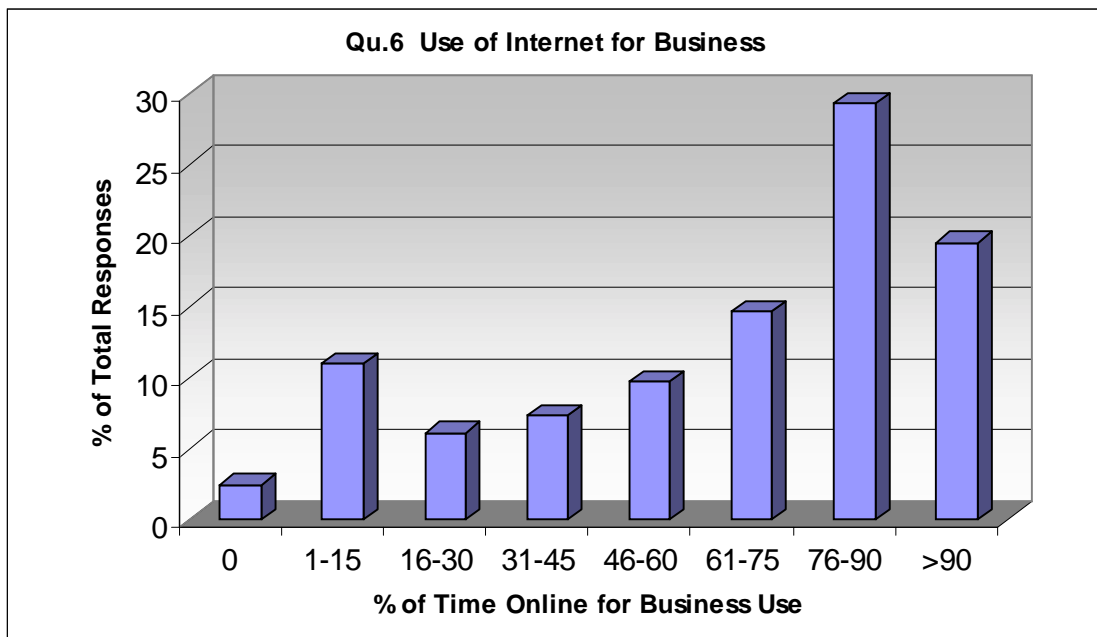


Fig. 3.6

QUESTION 7

*How long have you been actively using the Internet?*

Years	Frequency	Normalised
<1	3	4
1	3	4
2	19	23
3	16	19
4	18	22
5	10	12
6	4	5
>6	10	12
<b>Total =</b>	<b>83</b>	<b>100</b>

**Mean = 3.2 Years**

(Excluding >6 year group which is 12% of sample).

Note: bar widths in the chart below are all equal and do not relate to the percentage range in each class.

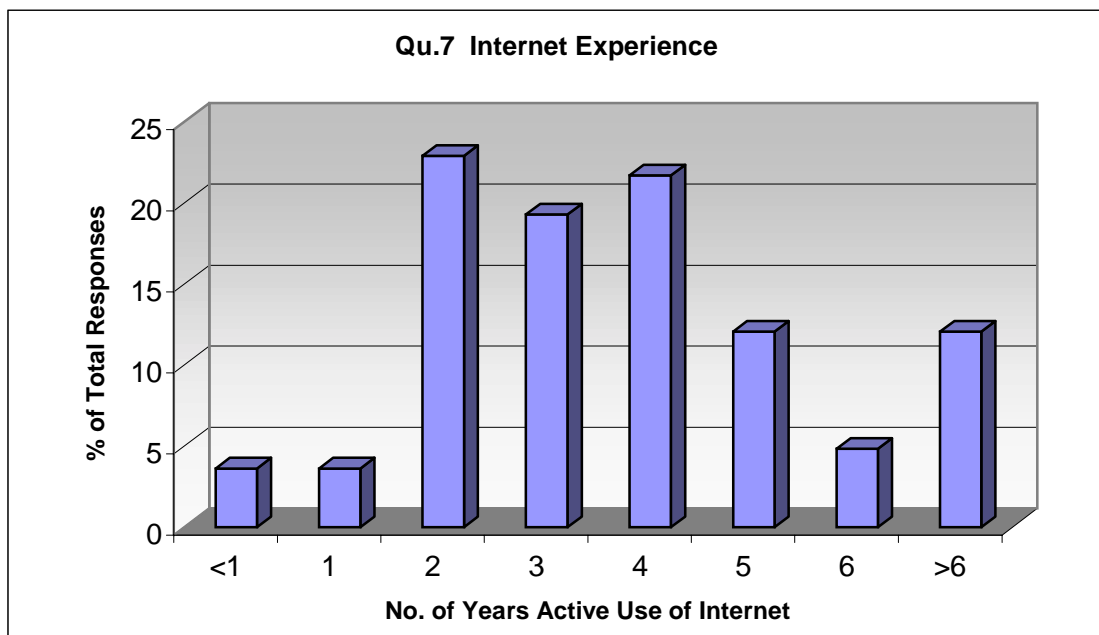


Fig. 3.7

QUESTION 8

*How dissatisfying are the following in your experience of the Internet?*

Results were scored 5 points for the 'Highest' rating down to 1 point for the 'Lowest' rating, with one point intervals in between (i.e. the inverse of the rating numbers shown on the form).

The arithmetic mean of all entries was calculated for each item, and used as an overall performance measure, on a scale of 1 to 5 for the level of 'dissatisfaction'. The variance (the square of the standard deviation) was used as an indication of how much individual scores varied for each item – the higher the variance, the more widely spread is the data. The total number of individual ratings received for each item are shown under 'Entries' – respondents were asked to leave blank those items they were unsure of.

Scored 1 – 5 (most dissatisfying).

	Mean Score	Variance	Entries	Other Suggestions	
<b>Speed of connection</b>	4.29	0.98	82	Crashes by isp link	4
<b>Confusing web sites</b>	3.61	1.27	79	"illegal action" msgs!	5
<b>Content quality</b>	3.39	1.15	80	Viruses	5
<b>Difficulty finding info</b>	3.08	1.56	75		
<b>Cost of connection</b>	2.82	2.28	74		
<b>Privacy</b>	2.79	1.41	67		
<b>Reliability of info</b>	2.57	1.20	70		
<b>Security</b>	2.41	1.33	69		

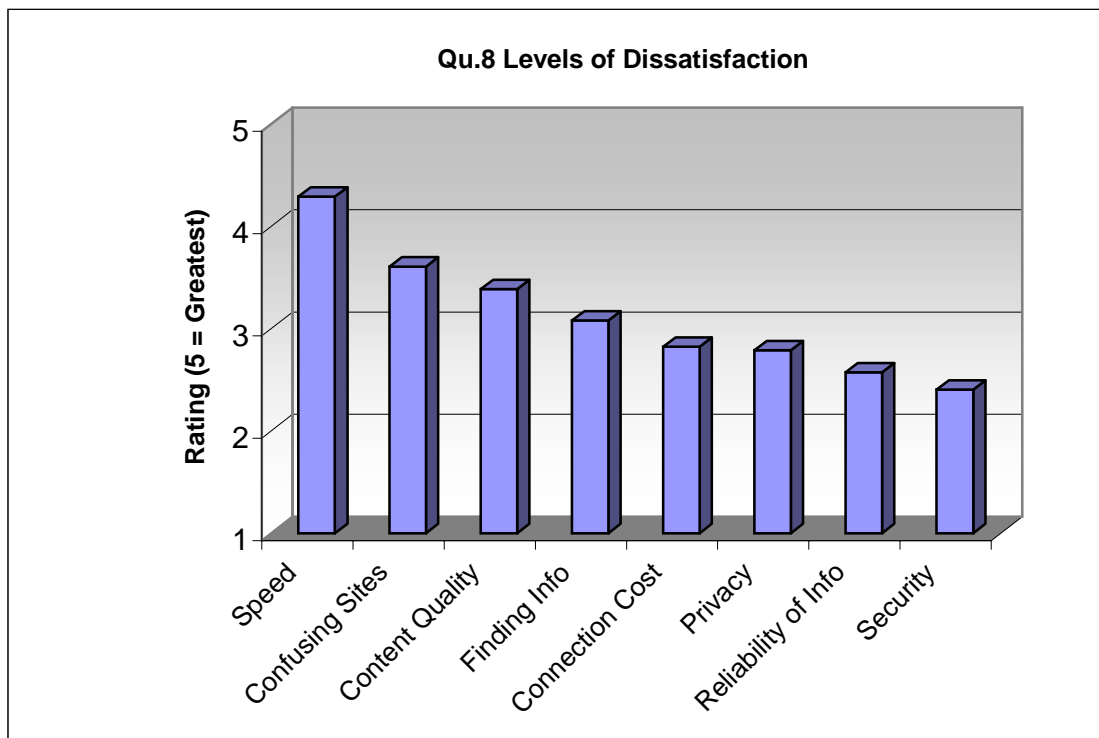


Fig. 3.8

QUESTION 9

*Demographic Information.*

Country	Frequency	Age Group (Years)	Frequency		
			Male	Female	Total
China	1	<15	1		1
India	2	15-19	3		3
New Zealand	1	20-29	4	4	8
Romania	1	30-39	15	3	18
Spain	2	40-49	22	4	26
USA	5	50-59	21	1	22
UK	71	60-69	3	1	4
		>69			0
<b>Total =</b>	<b>83</b>	<b>Total =</b>	<b>69</b>	<b>13</b>	<b>82</b>

**Approx. Mean Age = 42.6 yrs**

Note: bar widths in the chart below are all equal and do not relate to the age range in each class.

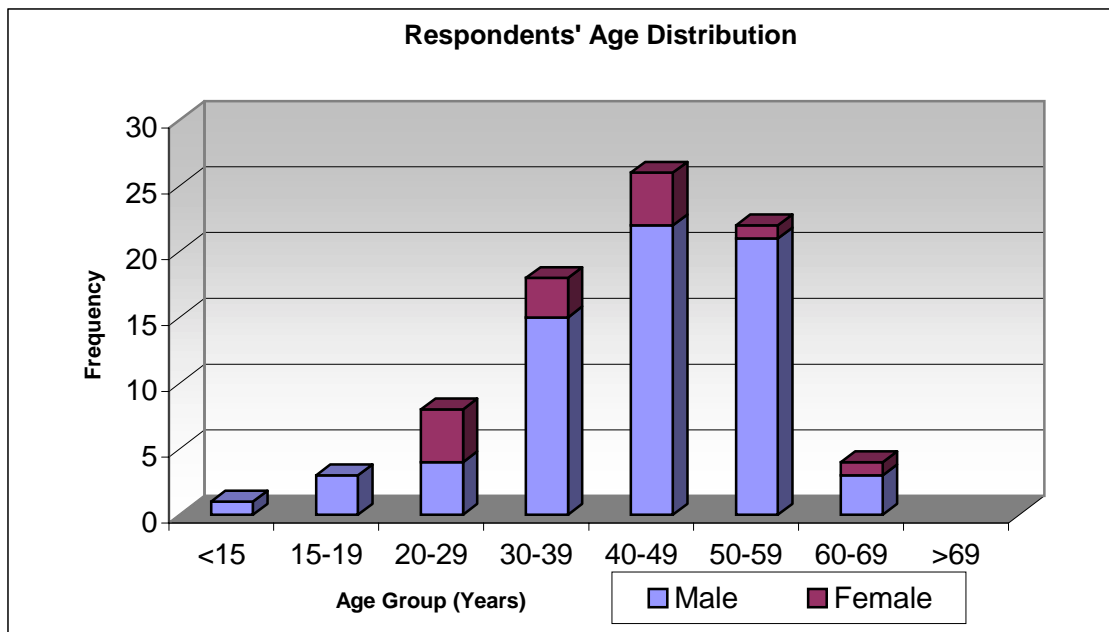


Fig. 3.9

QUESTION 10

*Options.*

	<b>Yes</b>	<b>No</b>	<b>No Selection</b>	<b>Total</b>
<b>Prize draw entry request</b>	61	12	10	73
<b>Request for survey summary</b>	74	3	6	77
<b>Opt in Mailing List</b>	45	24	14	69

## OTHER SURVEY COMPARISON

### FORRESTER RESEARCH

Half way through this project, the results of a similar survey were discovered. This was a 'UK Internet User Monitor' study by Forrester Research conducted in May 2000. The information made available did not indicate the size of the sample surveyed. Multiple responses were allowed, so totals exceed 100%.

*Which of the following has helped you find your way to the web sites you use?*

	1999	2000
<b>TV</b>	16%	48%
<b>Search Engine</b>	67%	81%
<b>Viral Marketing</b>	28%	56%
<b>Link</b>	39%	59%
<b>Online Ad</b>	10%	20%
<b>Guess URL</b>	22%	41%
<b>Direct Mail</b>	5%	10%
<b>Radio</b>	6%	19%

For comparison purposes the sequence of items follows that used for Questions 1 and 2, as far as possible. The Forrester survey does not include: 'Magazine', 'Newsgroup' or 'Email'. In addition they have 'Radio' as a separate method. Forrester's term 'Viral Marketing' is close to our 'Friend or Colleague' and their 'Online advertising' is very similar to our 'Banner Ad'.

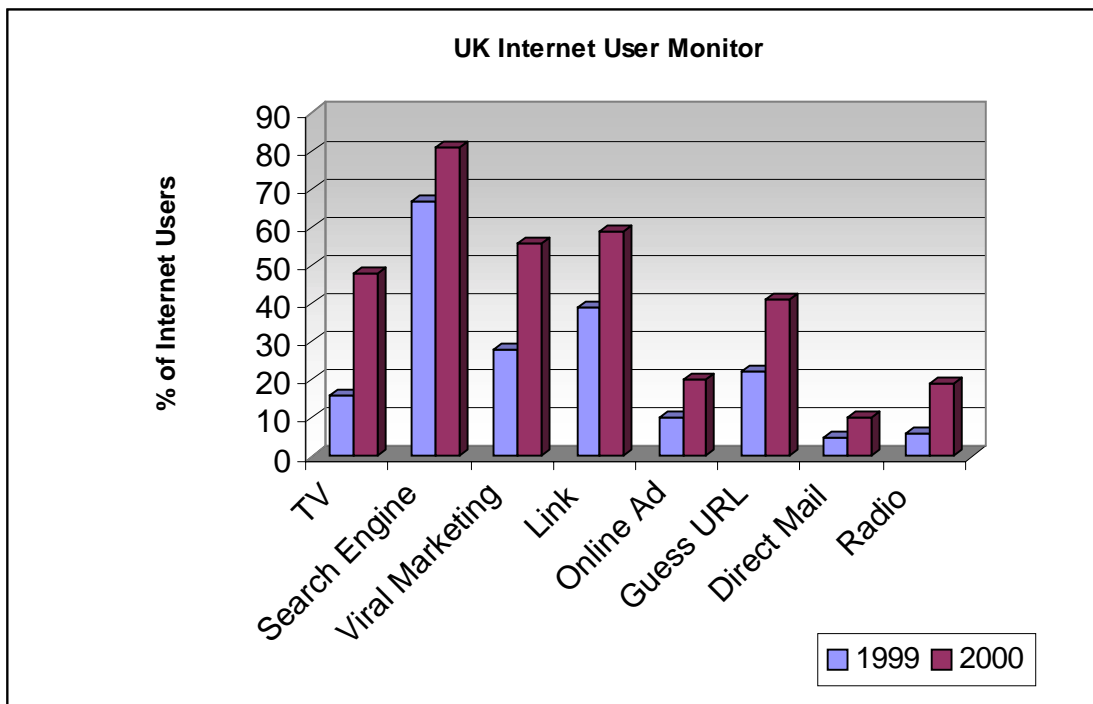


FIG. 3.10

## BUSINESS QUESTIONNAIRE

### QUESTIONS 1 & 2

These questions asked users to rank the following items, separately, in terms of their promotional effectiveness and their relative cost.

Results were scored 7 points for the 'Highest' rating down to 1 point for the 'Lowest' rating, with one point intervals in between (i.e. the inverse of the rating numbers shown on the form).

The arithmetic mean of all entries was calculated for each item, and used as an overall performance measure, on a scale of 1 to 7. The variance was used as a measure of the variability of scores.

	Promotional Effectiveness		Relative Cost	
	Mean Score	Variance	Average	Variance
Television / Radio	3.84	5.47	6.8	0.27
Printed Ads	4.52	3.16	5.71	1.01
Exhibitions, Conferences	3.67	3.03	5.62	1.95
Banner Ads	3.09	4.66	5.14	2.22
Printed Mail-shots	2.70	2.22	4.58	3.70
Press Releases, articles	4.90	2.83	3.90	2.19
Affiliate schemes	3.81	3.76	3.60	2.04
Search Engines	5.36	2.91	3.10	3.59
Link Building	4.50	2.36	2.60	2.67
Email newsletters, mass mail	4.91	3.42	2.52	2.56
Newsgroup postings	4.14	2.12	2.15	2.13

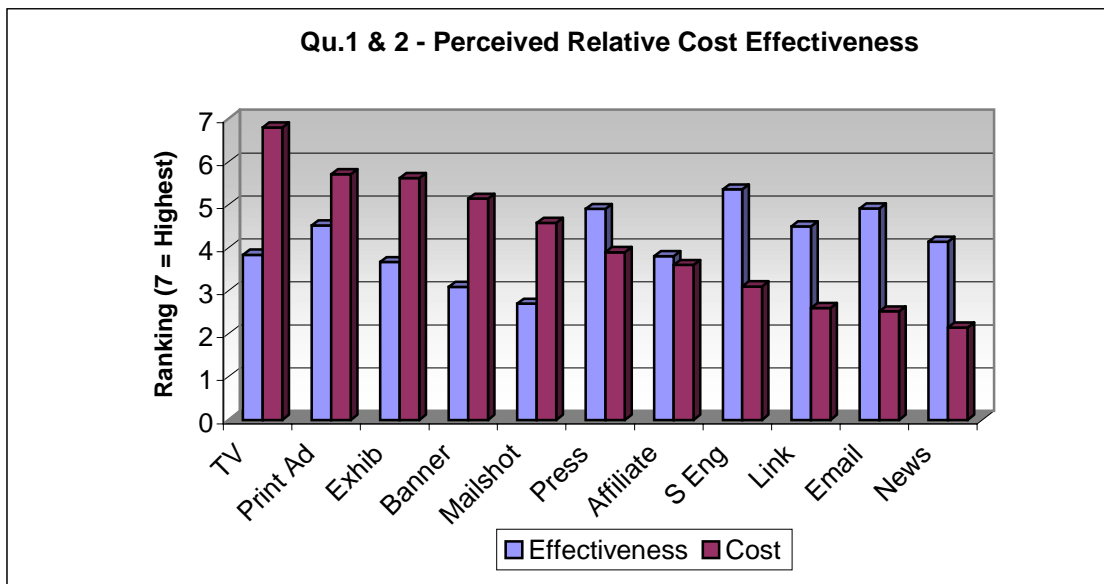


Fig. 3.11

The following two charts illustrate the data more meaningfully from a cost and effectiveness perspective. Fig.3.12 gives a 'radar' view and shows how much of the offline methods such as TV, Print Ads and Exhibitions are more costly than effective, while the online techniques such as search engines and email are more effective than costly.

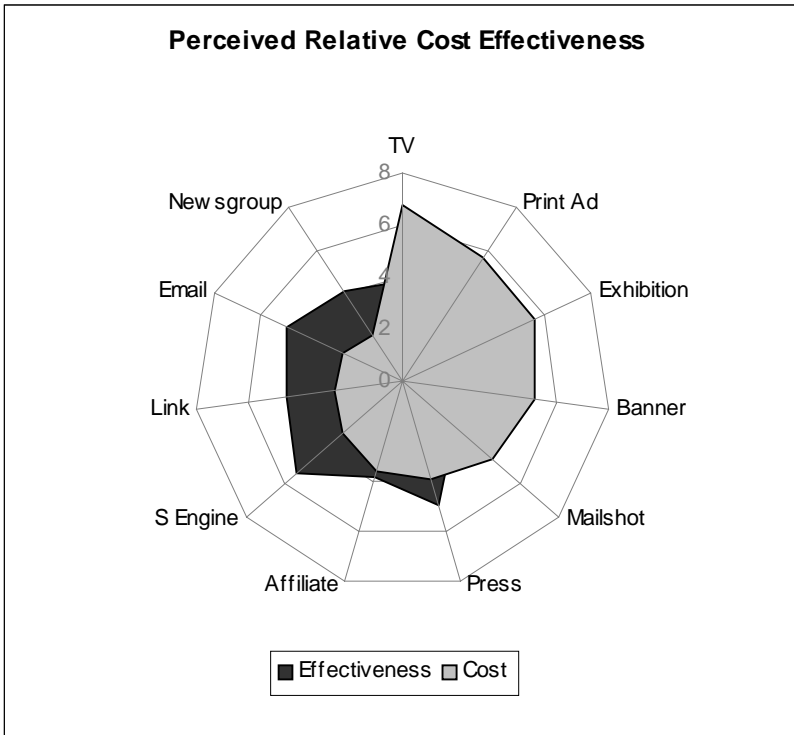


Fig. 3.12

Fig. 3.13 shows the data plotted as relative Cost vs. relative Effectiveness.

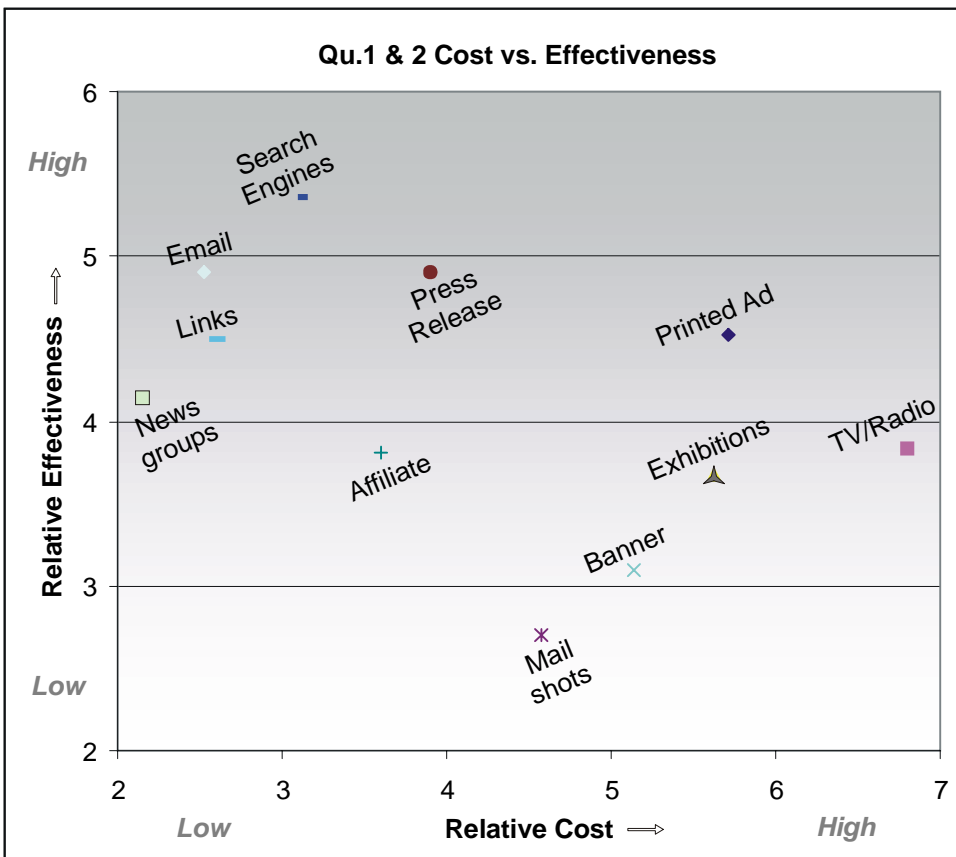


Fig. 3.13

### Question 3

How long have you been actively involved with the Internet

- a) as a User?
- b) in a Marketing capacity?

Years	Frequency	
	As User	In Marketing
<1	0	1
1	0	3
2	2	7
3	10	7
4	3	2
5	2	0
6	1	1
7	1	0
8	1	0
9	0	0
>9	2	1

**Total = 22 replies      22 replies**

**Mean = 4.4 years      2.8 years**

(assuming > 9 entries are all 10 years, therefore these figures are likely to be under-estimates).

Note: bar widths in the chart below are all equal and do not relate to the number of years in each class.

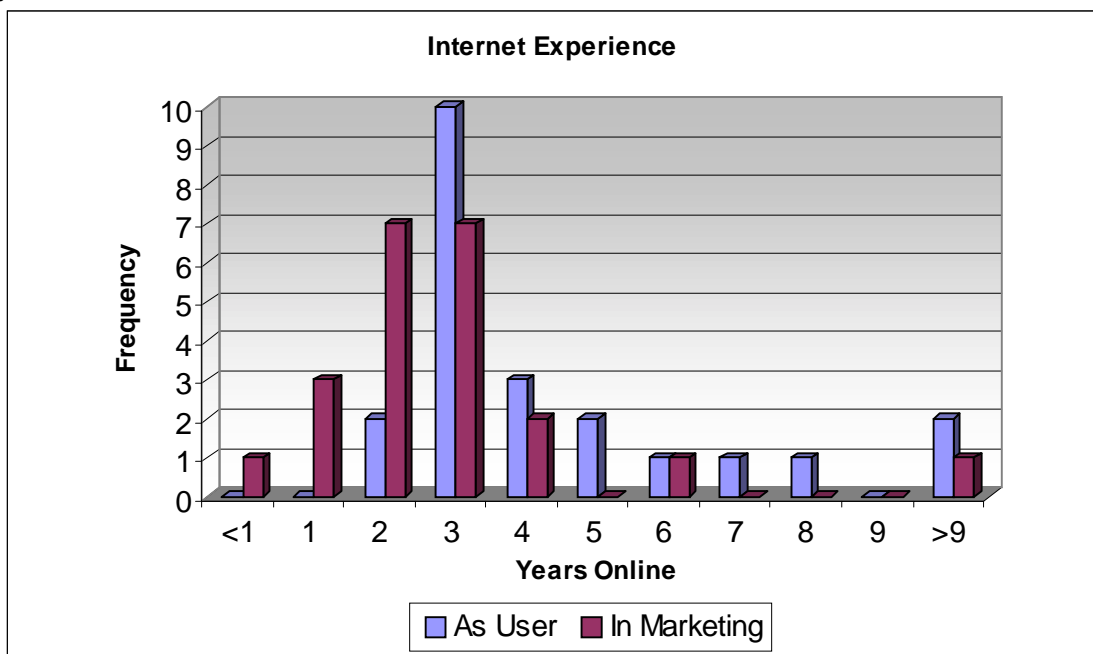


Fig. 3.14

QUESTIONS 5 – 18

	Qu.5 Position	Qu.9 Nature of Business	Qu.10 Web Site Age, Yrs	Qu.11 Total Sales, 3 months (£)
1	Director	Management consultancy	<1	
2	Webmaster	Content based websites and des.	2	50
3	Conference Director	R&D senior level big ticket events	4	
4	Director	Business Telephone Systems	1	25,000
5	Director	Internet Consultancy	<1	2,000
6	Company Secretary	Dot-com - pre-launch	<1	0
7	Director of Business Dev.	Interactive Advertising agency	2	5,000,000
8	Managing Director	E-tailer	3	
9	Sales	Energy Research & Consulting	3	400,000
10	Director	Internet Consultancy		
11	Web Editor	Manufacturing	3	900,000
12	Chief Executive			
13	Marketing Manager			
14	Manager	Beta-tester of websites.	2	
15	Student		1	
16	Managing Director	Payment Gateway for E-Com	3	
17	Project Manager	Supporting SMEs in business	4	0
18	Sales Director	Land & Property Dev	<1	
19	Chief Information Officer	E-business Education	1	500,000
20	Director	Business centre	<1	30,000
21	Partner	Marketing	6	
22	<i>(Part A only)</i>			

	Qu.12 % Sales online	Qu.13 Mktg Budget £/month	Qu.14 % Spent on Web Promo	Qu.15 Visitors/ month	Qu.16 Collect web stats ?	Qu.17 Relate traffic to promo?	Qu.18 Country
1							UK
2	100	0		2,600	yes	yes	
3	70	15,000	20		yes	no	UK
4	100	200	100	1,000	yes	yes	UK
5	10	0	0	600	no	yes	UK
6		10,000	30	0	yes		UK
7		5,000	0	N/A	no	yes	UK
8	100		100		yes	yes	UK
9	20				no	no	
10							
11	5	500	0	1,600	yes	yes	UK
12							UK
13							
14	100		10	1,200	yes	yes	Spain
15							Spain
16					no	yes	UK
17					no	yes	UK
18					no	yes	UK
19	80	0	0	6,000	yes	yes	UK
20	1	500	20	50	yes	no	UK
21				10,000	no	no	US
22	<i>(Part A only)</i>						

## DISCUSSION

### USERS QUESTIONNAIRE

The sample distribution is positively skewed (towards the older region of the spectrum), and has a mean age of 42.6 years – much older than the average European user of 30.9 years, and average USA user of 37.6 years, according to the 10<sup>th</sup> GVV survey. However, the GVV figures are based on 1998 data, and it is known that the WWW user age is quite rapidly moving towards the total population average, so the present Internet average is probably several years older now.

89% of respondents requested a summary of the survey results, indicating that this could have been a significant motivation for completing the survey – i.e. respondents were possibly self selecting on the basis of a common interest in this sort of survey.

An MMXI Europe survey (as reported by CyberAtlas, (*UK Internet Users Pass 10 Million, May 2000*) found that 51.6% of Internet users in the UK are men, 36.6% are women and the remaining 11.8% are children in the 2 – 14 years age group. This is completely different from the sample in this survey, which was dominated by men at 84%.

The average person in our sample has been online for 3 years, spends over 8 hours a week using the Internet, a third of which is spent actively searching for information - but only succeeds in finding what they want about 60% of the time. On average, just over 60% of their time online is used for business purposes. A surprisingly high percentage of people (17%) reported that they actively used the Internet for more than 24 hours/week, and 29% said that they had been online for 5 years or more. Nearly a quarter (21%) of these 'heavy' users in the >24 hours/week category declared their search success rate to be less than 46%, and exactly the same proportion of users (but different individuals) with five or more years of online experience said the same.

It is important to remember that this survey has only recorded peoples' opinions about their experiences – not impartially observed results. Also, it is not possible to verify the integrity of responses – how conscientiously and accurately people have expressed their views, or how well they have understood the questions. Some questions were impossible to specify precisely without introducing complex instructions – for example Qu.4, 'What percentage of time online do you spend actively searching?', could be understood in many ways. Some people may say that all their time is spent looking for information, even when they find a web site of interest, because they read documents and follow links continuously – in effect, surfing, reading, chasing links, surfing again, are all part of an extensive 'search' process. Other people may only account for search time as that spent on search engines trying to find a specific piece of information, and exclude the time spent browsing web sites that appear to have the answers they want. Similar experiences can thus be interpreted and reported differently. The results of this survey should be viewed in this context, and any quantitative measures derived should be used only as indicative pointers, not accurate statements of the true situation.

It would be interesting to measure the correlation between the search success rate and the level of experience of users (larger sample needed), but close inspection of the raw data suggests that it is new users who have most difficulty finding information, but this is by no means confined to novices. At issue, is whether people cannot find what they want because of lack of skill, or because the information is not available (unlikely), or because the search facilities they use are inadequate. This is worth further investigation.

Other surveys have reported similar findings about search problems. A RealNames survey of over 1,000 people by phone, reported that 44% of web users were frustrated with web navigation and search engine use. A WebTop commissioned MORI poll (*4.6 Million People Can't Find What They Need on the Net*) of 600 UK Internet users in June 2000 however found that 67% of the estimated 14.7 million adult population online are frustrated when searching for information, and 25% only find what they want "sometimes".

The most popular way of finding a specific, recently visited web site for the first time was through search engines (38% of the sample), and the least popular was banner ads, which no one claimed to have used. A similar pattern emerged when people were asked to rate the usefulness of different channels (Qu.2), with search engines being ranked as the most useful (scoring 4.3 on a maximum scale of 5.0), and banner ads the least (scoring 1.7). Magazines, friends and email were the next most popular routes to recently visited sites, but when scored for 'usefulness' in general, the order after search engines was changed to: friends, links, magazines, and then email. The poor performance of television as an advertising/information medium may be explained by the fact that it is only the larger portal sites which can afford to use this channel – i.e. there are not many of them, and these are probably mostly well known sites anyway which are building brand image, not just trying to attract new visitors who have never heard of them before.

The variability of the ratings in Qu.2 (as indicated by the variance here) gives some idea of the diversity of opinion in the sample. It is interesting to note that banner ads scored the lowest variance, indicating the highest consensus of opinion that these are the least useful method for driving web site traffic. The next most consistent scoring was achieved by search engines, and it is encouraging to see that the highest and lowest scoring items have attracted the least divergent opinions about their level of usefulness. Magazines and newsgroup scores on the other hand show a high degree of variability, perhaps reflecting differences in familiarity with the medium (e.g. newsgroups) and personal tastes (e.g. preference for Internet magazines - rating highly, or fashion magazines – rating low).

User suggestions for other routes to new web sites, included: radio, company stationery, IRC, mail-shot, guess the URL. These are important methods too, and illustrate the diversity of promotional opportunities.

The most dissatisfying aspect of using the Internet appears to be connection speed, followed by badly designed and confusing web sites, then content quality, and difficulty of finding information(Qu.8). Security was the least worrying issue, with reliability of information and personal privacy judged more important. This is an accordance with the findings of the GVU 10<sup>th</sup> survey which reported people are more concerned about quality of information, easy ordering, and reliability, than security.

The ratings for connection speed showed least variability, while those for the cost of connection showed the highest. This is not surprising as most business users are still connecting through 56k modems (65% of small UK businesses and 34% of medium sized businesses rely on a dial up connection according to an Oftel survey in September 2000) resulting in painfully slow downloads. The widespread adoption of the free ISP model in the UK in the last year has had a dramatic impact on connection costs for many users and small businesses. Some people continue to pay for subscriptions and metered calls, but for many these are now free – hence large differences in opinion on this issue.

Comparing results with a similar survey by Forrester Research (*UK Internet User Monitor*), see Fig. 3.10, confirms the importance of search engines and links as the most popular methods for finding new web sites. Viral marketing, friends, colleagues and any personal 'word of mouth' recommendations are also very important - but perhaps less easily defined for the purpose of an online survey. The percentage increase shown for *all* methods from 1999 to 2000 in the Forrester survey suggests that people are increasingly using a variety of methods to reach new sites.

It is possible to derive even more details from the figures people have supplied in this survey, though as cautioned above, these should be used as no more than an indication. For example, the average time lost to business users in this sample through wasted searches, may be estimated by calculating the following:

$$(\Sigma (H \times B/100 \times F/100 \times ((1-S)/100)))/n \times 60 \text{ minutes per week.}$$

where

H = Hours/week online

B = % of time online for Business use

F = % of time spent trying to Find information

S = % search success rate

= 50 minutes per week per user, lost to failed business related searches.

#### BUSINESS QUESTIONNAIRE

Twenty two good responses were received, nine of these also completed the Users survey. Although some printed versions of the questionnaire were sent by post, none of these were returned – all responses were received online. It was not intended to make any major comparisons between this group and the Users sample – only to draw on what was hoped to be the informed opinions of users with online marketing experience.

Over half the replies came from Director level or higher positions in businesses, others held specifically sales and marketing related job titles, some were in web and IT disciplines, and there was one student. Most were from the UK. Qu.5 – 18 paint a brief profile of their businesses, the largest achieving sales annualised at £20m p.a. and many attributing 100% of their turnover to their online presence. Just under half the replies admitted to monitoring visitor statistics (a much higher proportion than small Internet enabled businesses in general, it is felt). The declared visitor statistics averaged about 2,500 visitors per month. This data suggests that most of these are genuine responses with some experience of web marketing.

None of the Business sample had less than a year's experience online. The average length of online marketing experience was over 2 years.

The first two questions revealed surprising differences of opinion – with variances more than double those of Qu.2 in the Users questionnaire. The individual data shows extreme differences in ranking – for example, TV/Radio was rated as either No. 1 or 2 by seven people, and as No. 7 or 6 by another 6 people. This is most surprising for a group which is expected to be more experienced than the Users sample. Possible explanations for this might be:

- the Business sample is not representative of an experienced user group (failure of sample selection), and variances are higher because of the much smaller sample size

- respondents did not bother to answer the questions seriously
- the results accurately reflect users' opinions, but from very different perspectives

It is recognised that not too much can be read into these results because of the small sample size, but it is possible that the results are 'real', and they should not be dismissed out of hand. In fact, the results could support a hypothesis, for which anecdotal evidence has been accumulating throughout this project:

- the success of a promotional method for an Internet business depends to a much larger degree on the individual circumstances of that business and the way it is implemented, than for traditional operations with traditional media.

In other words, successful promotion on the WWW requires more accurate targeting of customers - and the methods to reach them. This will be discussed further in Section 4 – Promotional Methods (not available in this document).

The averaged results of Qu.1 and 2 provide a general indication of the perceived cost vs. effectiveness of these promotional methods. Consistent with the findings of the Users questionnaire, search engines are rated most highly for effectiveness, and banner ads are ranked near the bottom. In term of costs, television was not surprisingly, judged the most expensive medium, with newsgroup postings the cheapest of all. Interestingly, the variance of effectiveness scores for television was the highest of all, but the variance of cost ratings was the smallest. This reflects the uncertainty some people have about television advertising – only accessible to large companies, and possibly very successful if used wisely, but disastrous if badly implemented. On the other hand most people understand television is a very expensive medium so the spread of opinion on this aspect was very close.

A good way to visualise the averaged data from Qu.1 and 2 is to plot them on a Cost/Effectiveness chart, as shown in Fig. 3.13. This also provides a useful conceptual model to evaluate promotional methods, and will be explored further in the next section. The results obtained here show search engines as being the most cost effective method, closely followed by email and links in the low cost + high effectiveness sector. Most offline promotional activities are positioned in the high cost sector of the chart (printed ads, exhibitions, TV and radio).

## CONCLUSIONS

Search engines are the most popular way for people to find new web sites; banner ads are the least favourite.

People use a variety of routes to find sites, particularly 'word of mouth' recommendations by friends and colleagues, magazines, links from other web sites, and email news/mass-mailings. This suggests that any promotional plan should not be too dependent on one or two methods.

Connection speed is the most frustrating aspect for most Internet users, followed by badly organised and poor quality web sites. In general, businesses must improve usability of their web sites, navigation and content, before expending much effort on promotion – otherwise it will be wasted.

A small group of users with some marketing experience expressed widely differing opinions on the cost effectiveness of various promotional methods. This may be

indicative that promotion on the WWW is much more specific than traditional means, and cannot be generalised very easily. Success may depend to a large degree on matching promotional method with type of business and accurately targeted customers. The same group rated search engines, email, and links from other web sites as the most cost effective techniques on average.

In spite of the popularity of search engines, a lot of time is wasted on failed searches – a source of frustration with users, and a significant loss of time for business. Users reported that on average 40% of their searches online failed.

This survey has been based on a relatively small and non random sample – therefore the results are statistically unrepresentative of the business user population. They provide a useful insight into user perceptions, and a basis for further study.