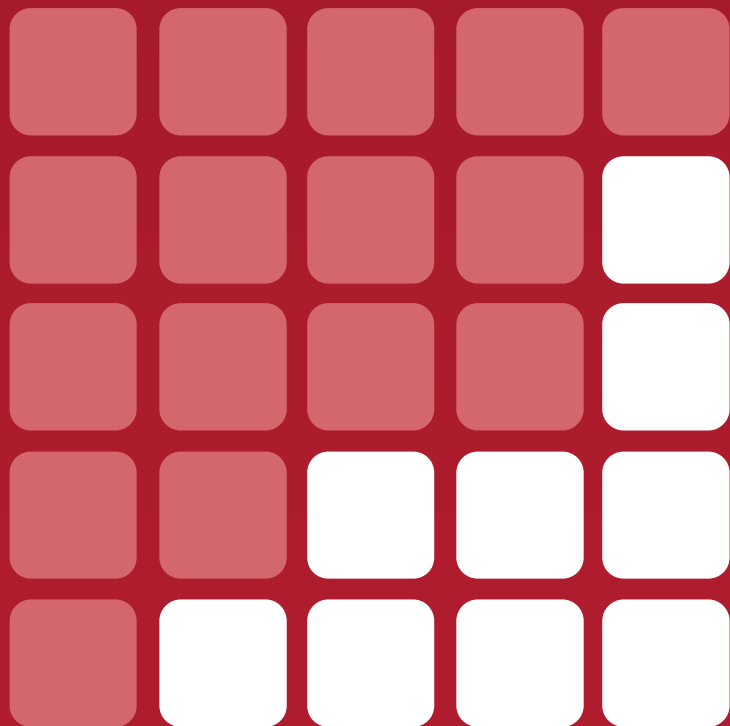


The Problem with Free Analytics

Risks and Recommendations for Companies Planning to Standardize on a Free Web Analytics Solution



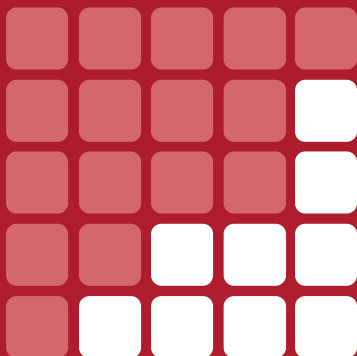
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There appears to be a very strong correlation between a lack of investment in web analytics technology and a sub-optimal use of web analytics.



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Introduction

In March 2007, Eric T. Peterson, web analytics author and industry thought leader, and Zori Bayriamova, former JupiterResearch analyst and experienced market researcher successfully completed the largest survey of web analytics practitioners around the world, leveraging Mr. Peterson's network of contacts and extensive database of individuals interested in the topic. Because all participants were actively interested and involved with web analytics, the overview of this research provides a valuable look into the current state of web analytics.

Our Findings

This is not a report written to criticize the value of freely available web analytics tools. Nor was it written to champion the use of any particular for-fee solution. Rather, this report was written to summarize a series of correlations that the authors believe to be relevant and important to any company that is considering making an investment—either of money or of time—in web analytics tools and technology. That being said, **there appears to be a very strong correlation between a lack of investment in web analytics technology and a sub-optimal use of this type of technology.**

In 2007, the practice of “doing” web analytics is well understood. Eric T. Peterson, the primary author of this document, has spent nearly a decade working with web measurement technologies and has counseled hundreds of companies around the world on their appropriate use. In that time, three fundamental requirements for sustainable success with web analytics have emerged:

1. **The need for commitment.** Web analytics is complex enough that companies hoping to better understand their web sites using this technology must be committed to working for success. Web analytics is not magic, the applications are often difficult to use, and desire will never replace a demonstrated effort to learn and use web analytics tools.
2. **The need for dedicated resources.** Since JupiterResearch's 2004 report, *Web Analytics: Spending, Staffing, and Vendor Selection*, there has been a clear, industry-wide message that “smart people are necessary” to be successful with web analytics. More recently, Forrester Research followed up on this report and provided both additional data and a framework for calculating the return on investment from dedicated staff in web analytics projects. Web analytics requires bright, well-trained people to produce the return on investment that most companies are looking for.
3. **The need for experience.** Web analytics isn't taught in college. Most of the practitioners working in the field today are self-taught and self-reliant, having learned what they know from a smattering of books, an engaging online forum, and simply working on measurement systems year after year to try and answer relevant business questions. There is no replacement for having “seen this before” in web analytics.

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We set out to test whether there was a detectable difference in respondents' approach to these criteria depending on the type of analytics tools they are using. A profound difference was uncovered, one that may not bode well for organizations currently trying to leverage "free" tools. The most telling data regarding the fundamental differences between companies deploying free and for-fee solutions are the following:

- **Users of free tools are far more likely to treat web analytics as an *ad hoc* endeavor.** Web analytics is a series of processes that are well defined and largely the same from company to company. Smart people need to manage and maintain these processes within the organization, and the lack of people and process almost always leads to a dramatic under-utilization and under-appreciation of the value that web analytics technology can provide. The data in this report highlights that users of free tools are dramatically less likely to take a people- or process-centric approach towards web analytics, instead reporting an *ad hoc* usage that has been demonstrated time and time again to fail to produce results that match expectations.
- **Users of free tools are far more likely to work in situations lacking sufficient resources to be successful with web analytics.** As stated above, web analytics depends heavily on people and process, if for no other reason than even the best tools are still complex applications loaded with jargon and based on a series of assumptions that can have a significant impact on the interpretation of results. The data in this report shows that users of free tools are less likely to dedicate resources to web analytics projects, again failing to give these projects the attention they require to drive success within the organization.
- **Users of free tools are newer to the practice of web analytics than counterparts using licensed tools.** Given that web analytics can be complex, especially the act of producing true analysis of the available data, years of experience using these tools frequently pays off in ways that are difficult to measure. The data in this report shows that users of free tools are, on average, newer to the practice of web analytics than their counterparts using for-fee applications. While every practitioner is different, experience tells us that the most effective web analysts are frequently those with three to five years in the field.

While these observations may seem appear to suggest it is impossible to be successful using free web analytics tools this is hardly the case. Throughout this report there is ample evidence that *given sufficient organizational commitment* and attention to process that **any company using any application regardless of price can be tremendously successful in their use of web analytics.**

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Companies who have decided to standardize on free solutions need to work overtime to be successful in their endeavors.

Our Recommendations

Based on the survey findings, we make the following recommendations to any company wishing to be truly successful with web analytics:

1. **Companies who have decided to standardize on free solutions need to work overtime to be successful in their endeavors.** Given the reported data describing allocation of staff and approach towards web analytics, it is clear that any organization hoping to save on the cost of technology needs to take a diligent and process-oriented approach towards web analytics.

We suspect that many of the failings associated with free web analytics tools reported here can be directly attributed to a lack of commitment to fully understand and effectively use the selected technology. Given that you often “get what you pay for”—which does not speak so much to the quality of tools but rather the quality of outputs—those companies dead-set on using free tools despite the guidance in this report need to increase their efforts to hire experienced staff, define goals for web analytics projects, ensure quality deployments, and drive the production of analysis, rather than simply settling for “pretty reports that nobody really ever looks at.”

2. **Companies who have decided to standardize on free solutions must spend the money they've saved on technology to hire smart people.** The guidance provided by Mr. Peterson years ago while at JupiterResearch to dedicate appropriate and experienced resources to web analytics projects is doubly true for companies choosing to deploy free solutions.

The guidance to hire dedicated resources, originally given in 2004 in the report *Web Analytics: Staffing, Spending, and Vendor Selection* and since reiterated by any number of analysts and independent consultants, is *critical* to those organizations hoping to be truly successful using web analytics but wanting to minimize their technology expenses. Put another way, limited vendor support and a lack of internal attention almost never produces significant and repeatable results in web analytics.

3. **Companies serious about improving their web sites but unable to commit the necessary resources should consider licensed web analytics solutions.** Companies unable to work overtime to be successful using free analytics applications are well advised to leverage the experience, expertise, and support infrastructure provided by nearly all of the for-fee vendors in the marketplace today.

This is perhaps the most contentious statement we could possibly make in a time when Google is giving away a moderately robust free web analytics solution, but the data strongly suggests that this statement is true. Please note, **we are not saying that for-fee solutions are necessarily better than free solutions**—only that there is a level of support that established vendors like Omniture, WebTrends, Coremetrics and Visual Sciences provide that can serve as a good proxy for

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commitment and resources at companies unable to follow our first and second recommendations.

The Data

The data presented in this document reflects responses from only U.S.-based end-users of web analytics (see Methodology). Our analysis of the data is broken down by differences in use, differences in management strategy, and the differences in respondent's personal experience with web analytics.

Differences in Use of Web Analytics Tools

The differences in organizational use of web analytics tools observed between the two cost models can be summarized as follows:

1. **Users of free tools are far more likely to treat web analytics as an *ad hoc* endeavor**, not demonstrating the same level of strategic or long-term commitment to web analytics shown by respondents deploying licensed tools.
2. **Users of free tools are substantially less likely to use web analytics as part of their decision making process**, with the majority either unsure how to integrate web analytics into their decision making process (8 percent), only using web analytics data for general guidance (41 percent) or to support tactical decisions only (8percent).
3. **Users of free tools are less likely to have the majority of their web-related questions answered by the tools they've deployed**, with nearly half of all respondents (46 percent) reporting that web analytics tools answer less than 50 percent of the questions they have.

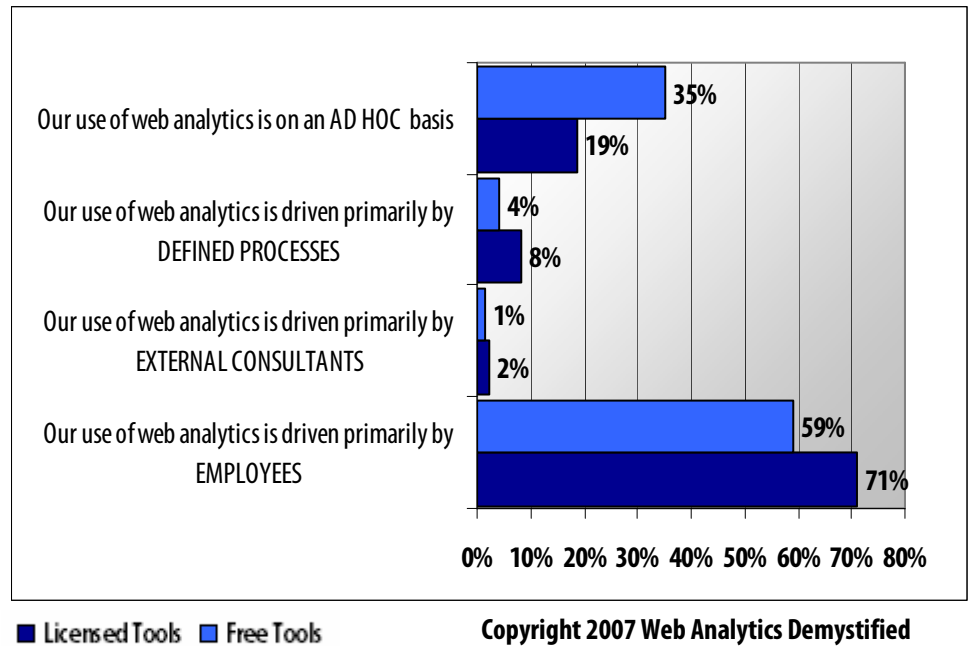
As you can see in Figure 1, there are pronounced differences in how users of licensed and for-fee solutions manage web analytics internally. Users of free solutions are half as likely to employ a process-driven approach, 20 percent less likely to rely on employees, and nearly twice as likely to take an *ad hoc* approach to web analytics. The latter numbers are of greatest concern to us, given that an unstructured approach towards analytics rarely provides any significant value to the organization.

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Thirty five percent of companies deploying a free solution treat web analytics as an occasional endeavor.

Figure 1: Different strategies for managing web analytics deployments and usage internally.



Question: Which of the following statements best describes the way your organization manages web analytics processes? (n=324 end-users deploying licensed web analytics applications, n=71 End-users deploying free web analytics applications, US only)

Unpublished data from the same study shows that when companies rely on an *ad hoc* approach towards web analytics they are also:

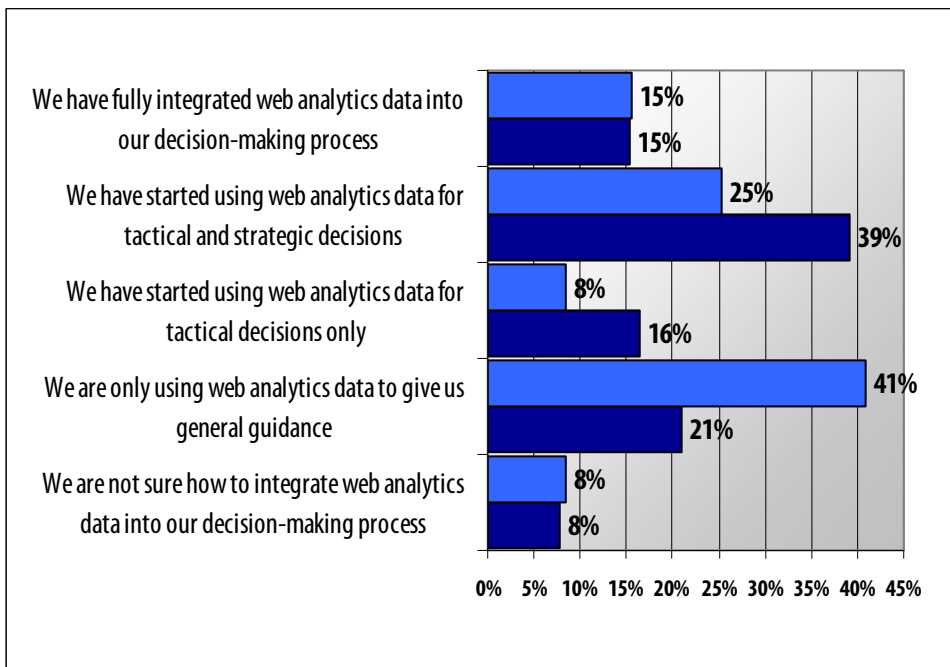
- Far more likely to be unsure how to integrate web analytics into their organization's decision making process and to only be using web analytics for general guidance
- Far more likely to be understaffed for web analytics
- More likely to report that their current approach answers less than half of their questions about user interaction with their web site
- Less likely to be employing senior web analytics practitioners having four or more years of experience

Users of free solutions are nearly twice as likely to use web analytics only to provide general guidance as they are to be using web analytics to support tactical and both tactical and strategic business decisions, pointing again to a failure to take advantage of web analytics as an input in the decision making process (Figure 2). Given that the strategic use of web analytics is most companies' goal—and the point where substantial return on investment materializes—this data suggests that many users of free solutions may be disappointed with the results their solution provides the organization.

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Figure 2: Levels of integration of web analytics into the organizational decision making process.



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Question: Please indicate to what extent web analytics data is integrated into your organization's decision-making process? (n=324 End-users deploying licensed web analytics applications, n=71 End-users deploying free web analytics applications, US only)

There is evidence that the situation is not without hope, given that 15 percent of users of both free and for-fee solutions report that web analytics data is fully-integrated into their decision making process—and that 8 percent of both groups report being lost regarding how to start using web analytics in the decision-making process. More than anything this observation highlights that success with web analytics is *not* intrinsically tied to how much you pay for technology but rather your organizational commitment to being successful with web analytics.

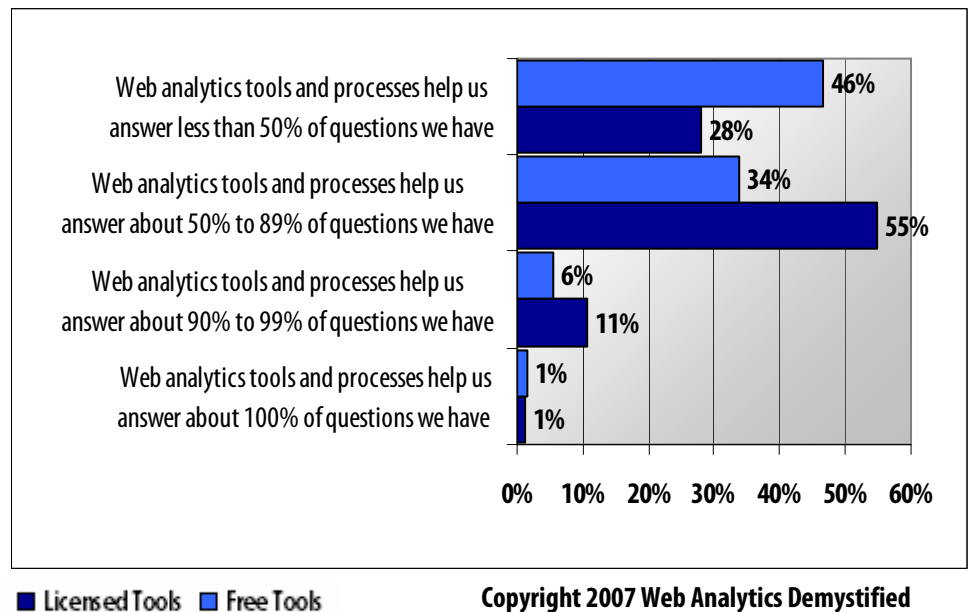
In Figure 3 you can see pronounced differences in nearly all areas between free and for-fee solutions, the most notable being that significantly more users of free solutions report that web analytics is currently answering less than half of their web-related questions. Unfortunately we cannot conclude whether this failure can be attributed to a lack of experience on the part of the analyst, the size of the company, or the quality and kind of questions being asked. Regardless, unanswered questions provide little value to the organization asking them, and the data illustrates companies employing free tools have many more unanswered questions about their web analytics data than companies using licensed technology.

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Forty six percent of companies deploying a free solution report that their tools and processes help answer less than half of their questions about visitor behavior and online marketing.

Figure 3: Ability of web analytics tools and processes to answer relevant business questions.



Question: Please indicate how helpful your web analytics tools and processes are in terms of answering questions about online user's interaction with your web site (e.g. visitors' behavior web site traffic and online marketing efforts) (n=324 End-users deploying licensed web analytics applications, n=71 End-users deploying free web analytics applications, US only)

Differences in Management Strategy for Web Analytics

The differences in management strategy towards web analytics observed between the two licensing models can be summarized as follows:

1. **Smaller companies are substantially more likely to use free tools**, with 52 percent of respondents using free tools working for companies of less than 50 people worldwide.
2. **Users of free tools are far more likely to work in situations lacking sufficient resources to be successful with web analytics**, with 42 percent reporting zero dedicated resources for web analytics and an additional 39 percent reporting only a single dedicated resource, or 1.0 FTE equivalent.
3. **Users of free tools are substantially more likely to have only recently deployed the tools they're using**, with 63 percent reporting having deployed their primary solution in the last two years.

The two most obvious differences shown in Figure 4 appear in the largest and smallest companies, which are diametrically opposed in their approach towards web analytics solutions. The fact that 66 percent of companies deploying free tools report having fewer than 100 employees is perhaps good news—companies with fewer resources may be investing in web analytics in a rational, budget-conscious way (essentially walking before they try to run.)

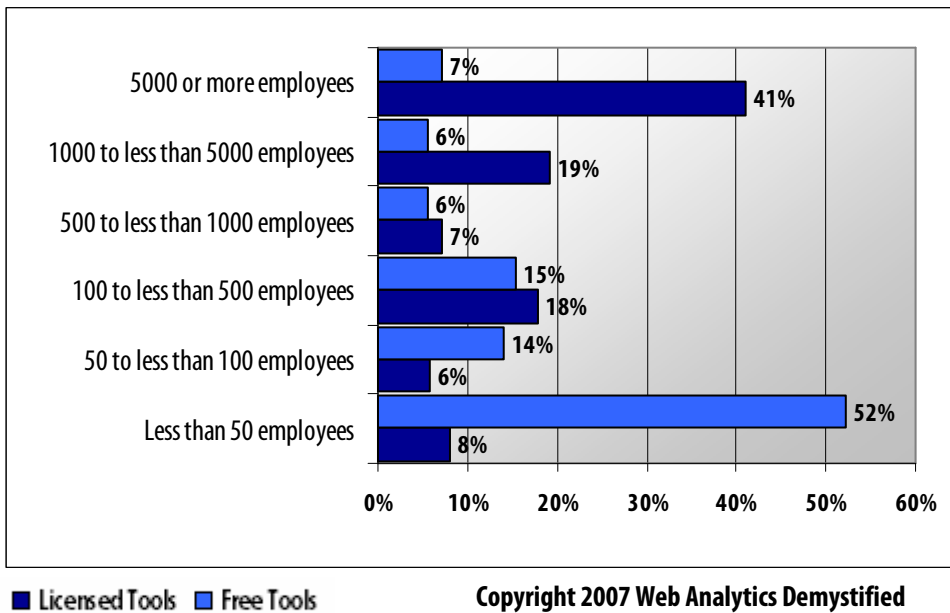
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Still, smaller companies appear:

- Less likely to dedicate resources
- More likely to pay the resources they do have *less* than their peers at larger companies
- More likely to leverage an *ad hoc* approach towards analytics
- More likely to employ less experienced analysts who are solely responsible for making decisions based on the available data

Figure 4: Size of organization.



Question: Please indicate the total number of employees in your organization worldwide. (n=324 End-users deploying licensed web analytics applications, n=71 End-users deploying free web analytics applications, US only)

Each of these data points considered individually seems reasonable; what is unreasonable is the persistent belief that smaller companies have less to gain from web analytics. The Internet is the great leveler—small, little known brands compete with major, established brands every day. It is our belief at Web Analytics Demystified that any company, regardless of size, willing to invest in understanding their audience can do great things.

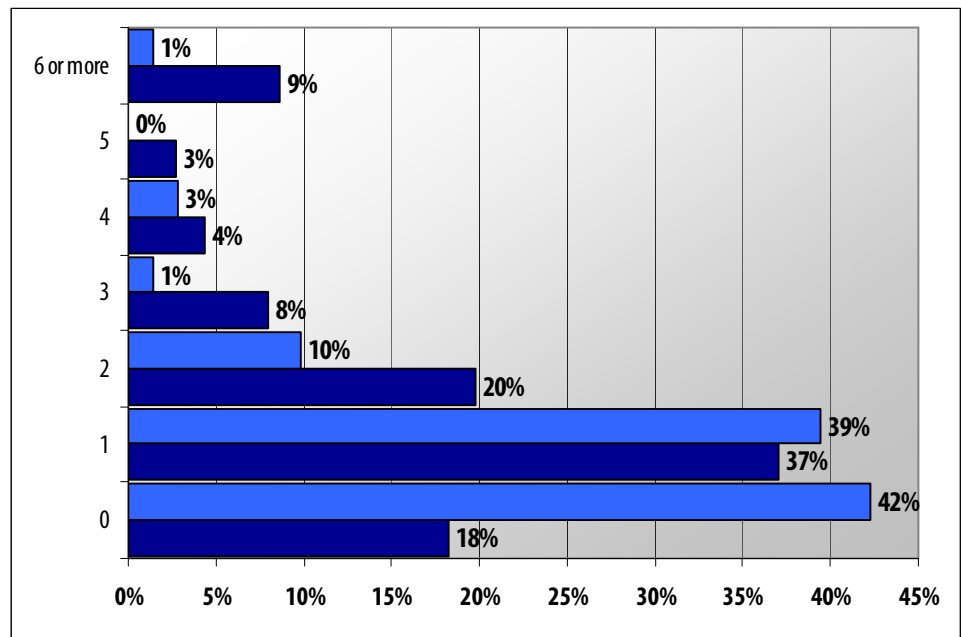
The most profound differences observed in approach to staffing shown in Figure 5 occur at both ends of the spectrum, those companies dedicating “0” resources and those companies dedicating “6 or more” resources. At the low end it is both encouraging that only one in five respondents using for-fee solutions report having no resources, and discouraging that 42 percent of respondents using free solutions report the same. At the high end, it is quite encouraging to see evidence of full teams of web analytics professionals deployed in nearly 10 percent of organizations using licensed web analytics tools.

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Forty two percent of companies deploying a free solution report having no dedicated resources for web analytics projects.

Figure 5: Number of resources dedicated to web analytics projects.



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Question: In total how many full-time employees or full-time equivalents (FTE) in your organization are dedicated to web analytics related projects? (n=324 End-users deploying licensed web analytics applications, n=71 End-users deploying free web analytics applications, US only)

Note that the way this question was worded may have encouraged “rounding up” and the number of respondent companies with no fully dedicated resources is likely much higher than the number of respondents who reported “0” FTE. There is a profound difference between having one full-time person focused on web analytics in an organization and having four people contributing 0.25 FTE adding up to 1.0 FTE.

That said, we see a significant opportunity in the web analytics marketplace here, specifically with the 42 percent of companies using free solutions. Given our long-standing guidance to hire dedicated resources, coupled with the relatively recent improvements in freely-available measurement tools, those companies deploying free solutions, and who reported 0 FTE are *strongly advised* to invest the money they’ve saved directly into dedicated staff. While these resources can be difficult to come by, finding them is far from impossible, and the value of dedicated staff to web analytics projects is clear.

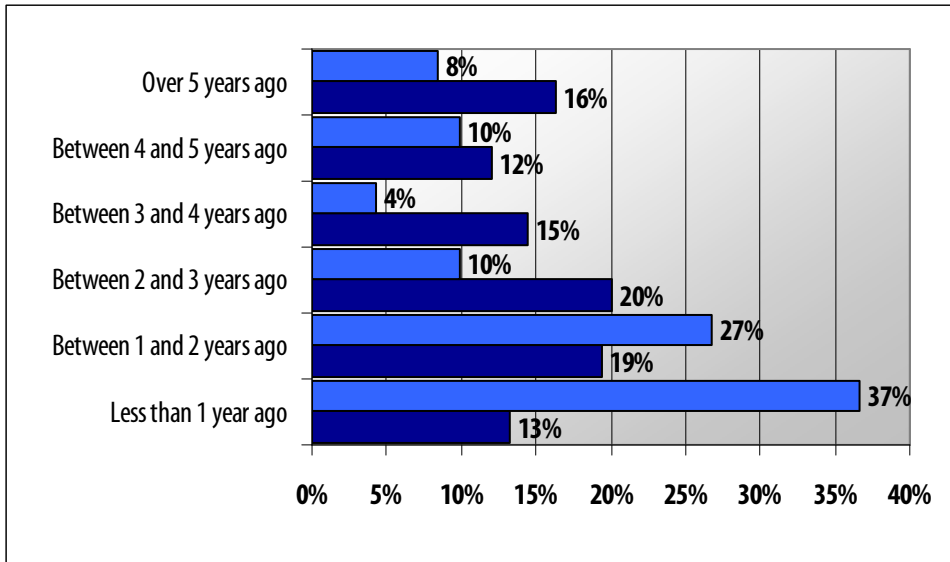
Perhaps unsurprisingly given the relatively recent availability of high-quality free web analytics tools like Google Analytics, the majority of companies deploying free tools have done so within the last two years (63 percent, Figure 6; Google started giving away Google Analytics on November 15, 2005) But more importantly, the frequent churn observed in the for-fee application marketplace in the early part of this decade appears to have slowed as evidenced by 16 percent of respondents

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reporting more than five years of use of their primary application and 43 percent of respondents reporting three or more years of use of their primary application.

Figure 6: Tenure using the current web analytics technology.



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Question: When did you first deploy your primary web analytics application? (n=324 End-users deploying licensed web analytics applications, n=71 End-users deploying free web analytics applications, US only)

While the recent explosion in the deployment of free tools needs to be watched closely over time, the tenure numbers for for-fee solutions suggest that the web analytics market is evolving. Given our belief that *how* web analytics technology is used is *far more important* than the technology itself, the stabilization of analytics application deployment suggests that an increasing number of organizations are adopting this belief and recognizing that the failure to take advantage of web analytics is an organizational issue, not a technology issue.

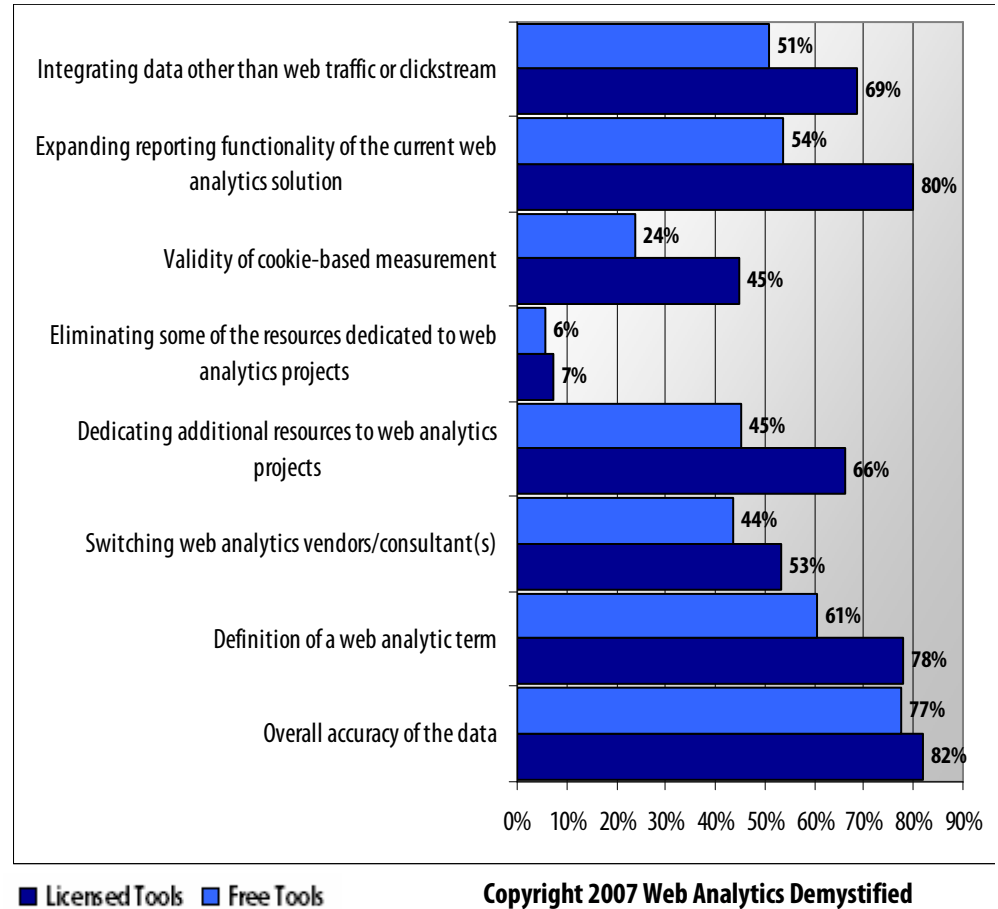
Regarding common concerns about web analytics, respondents deploying for-fee solutions appear to be more focused on a handful of important issues facing web analytics practitioners today (Figure 7). Issues regarding the validity of cookie-based measurement, definition of key terms, and the dedication of resources to web analytics projects all weigh heavily on the minds of those paying for web analytics and less so on those deploying free tools. Data integration and the expansion of reporting functionality are largely impossible using currently available free tools. Finally, those deploying free tools are no less likely to be concerned about the overall accuracy of data than those paying for technology.

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Those using free tools for web analytics are making less money on average than their counterparts using licensed solutions.

Figure 7: Primary web analytics concerns reported by the organization.



Question: Which of the following aspects related to usage of web analytics data were discussed within your organization in the past year? (Please select all that apply) (n=324 End-users deploying licensed web analytics applications, n=71 End-users deploying free web analytics applications, US only)

Differences in Respondent's Personal Experience with Web Analytics

The differences in respondent's personal experience with web analytics observed between the two licensing models can be summarized as follows:

1. **Users of free tools are newer to the practice of web analytics than their counterparts currently using licensed tools**, with 58 percent of respondents working with free tools reporting having less than 2 years of experience with web analytics tools and 35 percent of them reporting less than a single year's experience.
2. **Users of free tools are less well compensated than their counterparts currently using licensed tools**, with 32 percent of respondents working with free tools reporting

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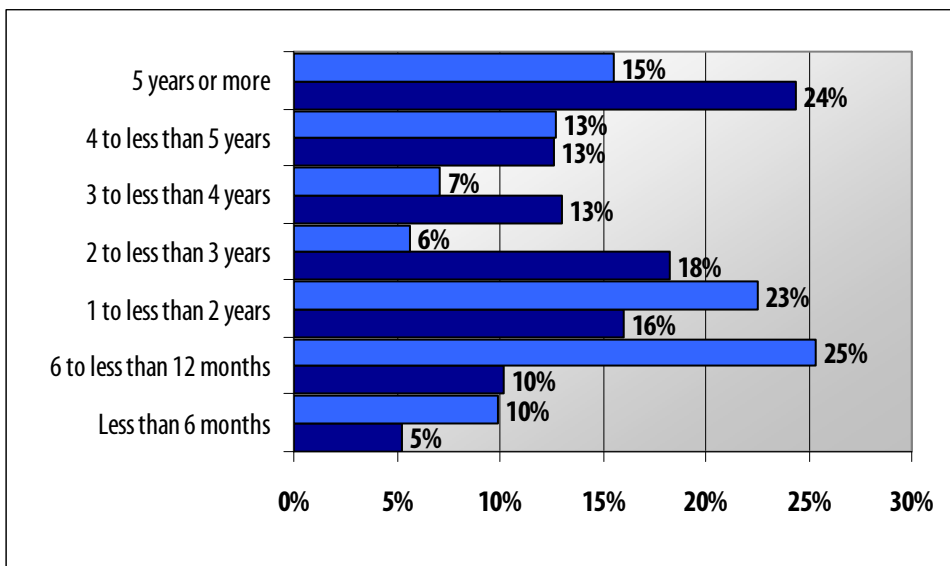
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earning less than \$50,000 and only 17 percent of them reporting earning in excess of \$100,001 annually.

3. **Perhaps related to size of company, users of free tools are more likely to work for organizations where web analytics is widely understood**, with 34 percent of respondents working with free tools reporting the belief that the majority of people coming in contact with web analytics data *actually* understand the data (compared to only 18 percent of respondents at companies using for-fee solutions.)
4. **Perhaps owing to their personal tenure with web analytics, users of free tools appear substantially less likely to be thinking about switching jobs**, with only 38 percent of respondents working with free tools indicating that they *had considered* switching jobs in the last 6 months (compared to 56 percent of respondents at companies using for-fee solutions.)

As shown in Figure 8, more than half (58 percent) of respondents using free tools have less than two years of experience with web analytics, compared to 31 percent of those using for-fee tools. Conversely, 50 percent of respondents using for-fee tools have at least three years of experience in web analytics, versus 35 percent of those using free tools. Given the importance of people to the process of using web analytics effectively, this distribution suggests that companies using free tools are less likely to benefit significantly from their web measurement efforts.

Figure 8: Respondent's personal experience using web analytics tools.



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Question: How much experience do you personally have using web analytics tools? (n=324 End-users deploying licensed web analytics applications, n=71 End-users deploying free web analytics applications, US only)

Unsurprisingly given personal tenure using web analytics, the majority of respondents using free tools are earning in the lowest pay range (under \$50,000 USD, 32 percent, Figure 9) The average

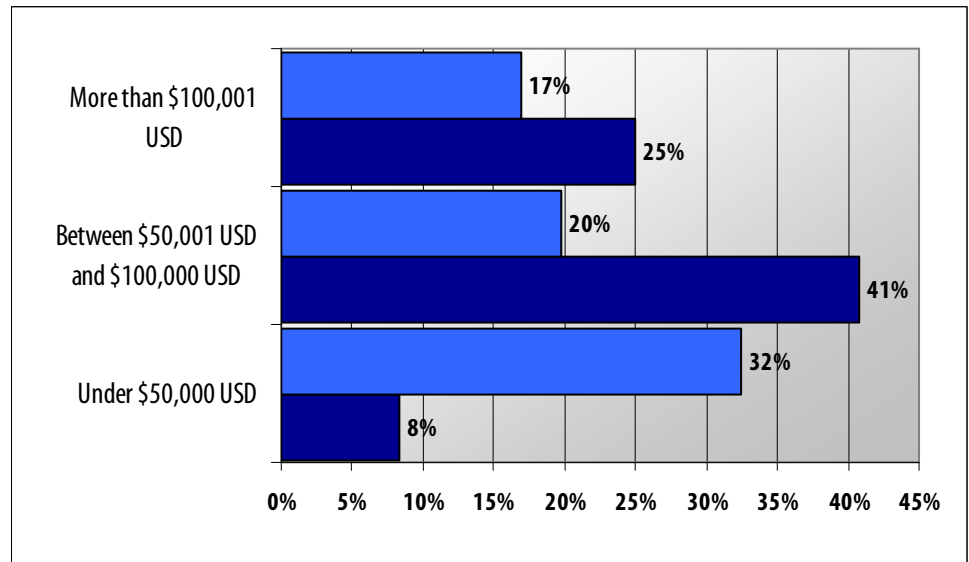
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Only 17 percent
of survey
respondents
primarily using a
free solution for
web analytics
are making more
than \$100,000
annually.

U.S. salary reported for those using free tools is \$75,800, the average for those using for-fee tools is close to \$89,500—a difference of nearly 18 percent! This difference is almost certainly more strongly correlated with personal tenure and size of company than license strategy, but it does suggest that experienced practitioners are better off working for companies who have made a financial investment in web analytics.

Figure 9: Respondents 2006 salary associated with web analytics.



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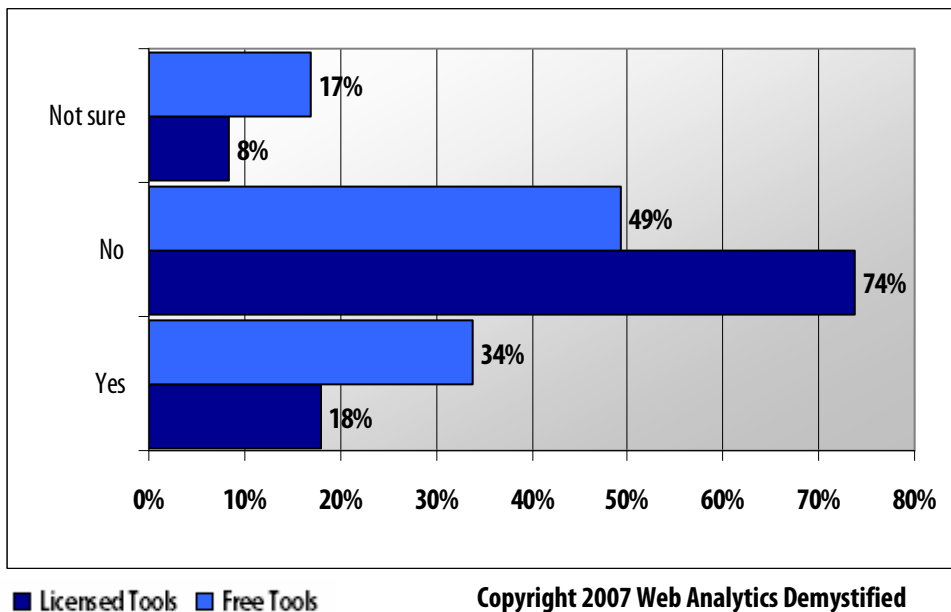
Question: For classification purposes only please indicate your 2006 pre-tax revenue associated with web analytics services. (n=324 End-users deploying licensed web analytics applications, n=71 End-users deploying free web analytics applications, US only)

Those using free tools are significantly more likely to report that the majority of people in the organization coming in contact with web analytics data *understand the data* (34 percent versus 18 percent of those respondents using for-fee solutions, Figure 10.) This very likely correlates to the 66 percent of respondents working for companies of 100 employees or fewer, as shown in Figure 4.

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Figure 10: Respondents believe that web analytics is widely understood within their organization.



Question: Do you personally believe that the majority of people in your or your client's organization who come in contact with web analytics data understand the data? (n=324 End-users deploying licensed web analytics applications, n=71 End-users deploying free web analytics applications, US only)

This data highlights a significant risk to larger companies paying for a web analytics solution: people given data they don't fully understand have a tendency to ignore the data, rather than working personally to improve their understanding. To overcome this issue, companies need to work overtime to ensure that data recipients understand the data they're given by perfecting the core web analytics business processes of providing end-user training and education.

Those respondents using free solutions are significantly less likely to be thinking about switching jobs in web analytics, great news for those companies (Figure 11). Given the importance of *people* to the process of doing web analytics, nothing is more frustrating than spending time and money to provide for the professional development of employees only to have them switch jobs, setting the entire organization back, sometimes significantly, in their ability to "do" web analytics. According to the Aberdeen Group web analytics professionals are in high demand and very hard to source, all the more reason to work diligently to compensate and retain any staff already hired.

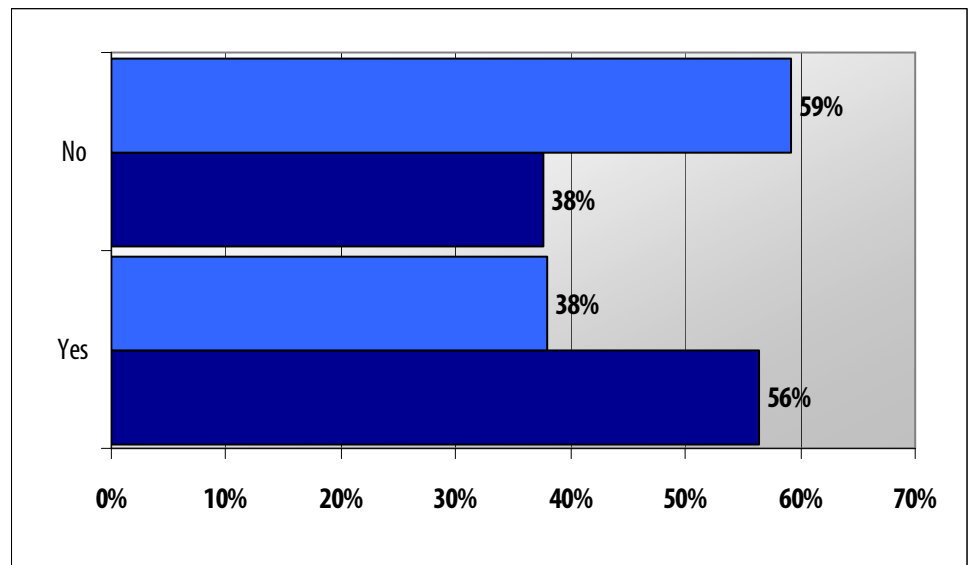
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Survey respondents using free web analytics tools were 50 percent less likely to have considered taking a new job in the last six months.

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Figure 11: Respondents thoughts about switching jobs within the web analytics field.



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Question: Keeping in mind that this survey is completely anonymous at any time in the last 6 months have you considered looking for a new web analytics job? (n=324 End-users deploying licensed web analytics applications, n=71 End-users deploying free web analytics applications, US only)

This data is very likely correlated to personal experience using web analytics tools—perhaps the recognition that it is better to develop web analytics skills in a safe environment than it is to switch jobs early in your career—but there is significant risk at companies using for-free solutions when 56 percent of respondents indicate they’ve considered switching jobs in the last 6 months. Others have also suggested that fewer users of free tools are less likely to consider switching jobs because there are relatively few advertised positions specifically looking for experience using free solutions like Google Analytics.

About the Research

Methodology

In March 2007, Web Analytics Demystified designed and disseminated a survey to web analytics users and consultants recruited randomly through web analytics-related websites and events; a total of 856 web analytics users and web analytics consultants from the around the world completed the survey. Respondents were asked approximately 20 closed-ended questions about the deployment and use of web analytics tools and processes, personal experience and attitudes related to web analytics, as well as company size and salaries. Respondents received an email invitation to participate in the survey with an attached URL linked to the web-based survey form.

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Approximately 10,000 invitations were sent out to respondents from different parts of the world, resulting in 1,077 responses (response rate of 10 percent); of these responses, a total of 856 completed the survey from beginning to end (completion rate of 80 percent). The interest and response to the survey were overwhelming and exceeded all expectations. The response level actually exceeded accepted industry standards for conducting research with non-panel respondents and equaled accepted industry standards for conducting research using an actively managed panel.

The data presented in this document reflects responses from the U.S.-based end-users of web analytics. The latter segmentation is based on survey participants' response to the question, "Which of the following best characterizes the capacity in which you personally use web analytic tools and processes?" Respondents were provided the following selection of answers:

- *I am part of an organization that has deployed a web analytics solution*
- I am part of an organization that sells web analytics software or services (e.g. web analytics vendor)
- I am part of an organization that provides web analytics consulting services (e.g. web analytics agency or consultancy)
- I am an independent consultant providing web analytics services
- *Other (please specify)*

Respondents are included in the data reported here only if they gave either the first or last response to this question (*italicized*). We were careful to verify that "Other" responses were consistent with the respondent being generally classified as an "end user" of web analytics.

About the Authors

Zori Bayriamova

Zori Bayriamova has five years of market research experience with specific focus on the Internet and new technologies. Currently, Mrs. Bayriamova is a research manager at TIME magazine's Consumer Research and Insights team. She oversees primary research efforts for TIME magazine and TIME.com. Previously, she was at Young & Rubicam where she worked on the Brand Asset Valuator (BAV) team and managed brand rating studies in Canada, Latin America, and Asia.

Prior to joining Y&R, Mrs. Bayriamova was part of the primary data research group at JupiterResearch where she collaborated with industry analysts and designed surveys for hypothesis-driven research. Her focus at Jupiter was surveying industry executives from industries such as online searching, web analytics, email marketing, online advertising, and IT. She contributed to more than 60 Jupiter reports in her final year with them in 2005.

Mrs. Bayriamova is originally from Bulgaria and came to the United States in 2000 to earn her Masters in Market Research. She currently lives in New York City and can be reached at Zori.Bayriamova@gmail.com.

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Eric T. Peterson

Eric T. Peterson, CEO and principal consultant at Web Analytics Demystified, has worked in web analytics since the late 1990s in a variety of roles, including practitioner, consultant, and analyst for several market-leading companies. He is the author of three best-selling books on the subject, *Web Analytics Demystified*, *Web Site Measurement Hacks*, and *The Big Book of Key Performance Indicators*, and is one of the most popular web analytics bloggers in the industry, at www.webanalyticsdemystified.com.

Mr. Peterson has committed much of his life to the betterment of the web analytics community, so much so that Jim Sterne, president and co-founder of the Web Analytics Association, says, "Eric's leadership in the industry is unparalleled, his devotion to the community is legendary, and his years of experience translate immediately into strategic and tactical competitive advantage for everybody who works with him."

For More Information

Web Analytics Demystified has published a complete report covering all of the questions asked in this survey and including all responses worldwide. This report is available at:

<http://www.webanalyticsdemystified.com/research/>

To receive future reports based on this and additional data, please visit:

<http://www.webanalyticsdemystified.com/survey/>

About Web Analytics Demystified

Web Analytics Demystified, founded in 2007 by internationally known author and former JupiterResearch analyst Eric T. Peterson, provides objective strategic guidance to companies striving to realize the full potential of their investment in web analytics. By bridging the gap between measurement technology and business strategy, Web Analytics Demystified has provided guidance to hundreds of companies around the world, including many of the best known retailers, financial services institutions, and media properties on the Internet.

For more information on Eric T. Peterson and Web Analytics Demystified, please visit www.webanalyticsdemystified.com, email eric.peterson@webanalyticsdemystified.com, or call (503) 282-2601.