

Bringing Broadband Research to the Masses:

Understanding the Power and Implication of Internet Research

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Introduction

Overview

While Internet research has become somewhat ubiquitous, there remains a certain degree of skepticism amongst clients. Concerns such as, "will the results be the same as my tracking research," and "is the sample the same as my usual sample" are frequently raised (see for example Miller, 2001). At the same time as these concerns are being raised by clients, the public has wholeheartedly embraced the Internet. As data from the Consumer TrendZ report shows (see Figure 1) just under 70% of all Canadians are online and a significant proportion have broadband (cable or DSL) access to the Internet.



Figure 1 – Penetration of On-line and Broadband, 1997 to Present

More relevant to the market research community is the degree to which the Canadian population has accepted the Internet. Since 1996 we note a steady increase in the proportion of the population that is very or somewhat familiar with on-line communication. In 1996, roughly one third of all Canadians were familiar with this form of communication and this has doubled to nearly 70% in 2003 (see Figure 2).



Figure 2 – Familiarity with On-line Communication 1996 to Present

Millward Brown Goldfarb partnered with Delvinia Interactive, and with funding from CANARIE's Advanced Research in Interactive Media Fund, undertook an examination of the role that broadband can play in market research. The undertaking was more than research based, however. The goal of the project was to determine the full financial impact that broadband has on market research.

The project examined the utility of broadband using the Millward Brown LINK[™] methodology and Delvinia's broadband survey technology - AskingMedia[™]. This methodology was deemed to be ideal for an experimental and controlled assessment of broadband since LINK[™] requires the viewing of full television commercials and responding to the commercials in real time. The LINK[™] method also includes a significant amount of normative data (based on the completion of more than 300 LINK[™] tests in Canada) with television creative. The LINK[™] methodology has been shown to be a consistent and reliable predictor of in market behaviour in numerous studies (Colman, S. & Brown, G., 1983; Hollis, 2001).

One of the key features of Delvinia's AskingMedia[™] broadband research tool was the use of a "live" instructional aid. In typical market research, that is, CATI, CAPI or face-to-face interviewing a human interviewer is available when the respondent requires clarification. This type of interaction is not available in most Internet research. The broadband tool includes a "live action" female guide who can be clicked on at any time to give answers to questions about question types, the way to respond to questions and other types of issues. One of the questions that the study was designed to address was the degree to which a "live" instructional aid such as this would be appreciated or not.

Although some human factors research has shown that people do not want their machines to be too life like (Mori, 1982; Weizenbaum, 1976) this implementation was not designed to make the system too life like, rather it was designed to make the system as user friendly as possible (Card, Moran & Newell, 1983; Baeker & Buxton, 1987).

Evaluation

In specific, a series of evaluations were completed that compared a "traditional" offline LINK[™] and a broadband based Internet version using Delvinia's broadband survey tool. Off-line and online Link[™] studies were run in parallel to understand the implications of going broadband:

- > What is the consistency of the results between the two data capture methods, and
- > What are the financial differences between the two data capture methods.

Two evaluations were completed and we are indebted to our corporate partners for their participation.

Expedia.ca allowed us to compare one of their television creatives in on-line and off-line formats to assess the broadband tool in its development stage. After modifications to the program, described in detail below, a second evaluation was completed. Nissan Canada allowed us to compare one of their television creatives in on-line and off-line formats to assess the full reliability, validity and financial impact of a broadband tool.

The valuation criteria are more than the simple results of the two tests. The outcome was evaluated along a number of dimensions – time, cost, and outcome of the results.

Outcome measures include the ability of the broadband condition to mimic the standard measures where necessary.

- Cost measures were evaluated by such things as cost of recruiting, cost savings in terms of sampling and all measures that include direct research costs. Productivity measures such as response rate, drop-out rates and recruiting rates are also a part of the evaluative criteria.
- Time is essentially a form of cost but can be evaluated separately. The time to complete the study/data collection was measured and quantified. Time-savings is important to business both as a cost measure and a speed-to-market measure.

The interplay between the outcome, cost and time measures will be used to inform the final success/failure decision.

Methodology and Results – Development Phase

Testing the Broadband Tool

After the broadband tool was developed by Delvinia a series of internal tests were made. A total of twelve respondents (employees of Millward Brown Goldfarb and their friends and family) used the broadband tool in a quasi live situation and then gave their feedback. This phase of the project was designed to ensure that the tool was easy to understand and use. Questioning centered on the use of the live action instructional aid and the overall system.

In the main the system worked fine. The video guide was well liked by all and did not require any changes. Changes in the description of some tasks were required but these tended to be minor.

Phase One Evaluation – The Live Test

After the changes were made to the system it was given its first live test. Overall, this test was designed to ensure that the tool would work over the Internet and to determine the response difference between broadband Internet users and dial-up Internet users.

The experimental design was a single-factor between-subjects design. The factor was in-person completion of the LINK[™] questionnaire (off-line) versus Internet completion (on-line).

The evaluation was done only with English-speaking Canadians as the ad was English only. One hundred people were recruited to complete the in-person test on June 14, 2003. Standard

telephone recruiting was used and all respondents were paid \$50 to complete the project. The task was completed in the Link[™] facility at Yonge and Sheppard. This was the evaluation that used the Expedia creative. As a result, respondents were screened to ensure that they had traveled for personal reasons in the past 12 months and that they were at least accepters of Internet shopping and travel arrangement.

One-hundred people were recruited for the on-line test. Respondents were recruited from a panel of respondents from Rogers. This is a panel of magazine subscribers. Approximately 900 recruiting e-mails were sent out on August 28, 2003. These were sent to all panel members and not just broadband subscribers. The same recruiting specs were used in the on-line portion as the off-line portion. The only difference is that for the off-line portion recruiting is done via the telephone before the actual LINK[™] data is collected while for the on-line portion the screener data is collected immediately prior to the LINK[™] portion and non-qualified people are simply disqualified from the study.

In this way we were able to track the importance of broadband to the tool.

Everyone, on-line and off-line, followed the exact same procedures, except for the method of survey access. At all times the respondents in the off-line portion of the project had access to a hostess who could answer any and all questions. Likewise, at all times respondents in the on-line portion of the project could click on a hostess button in the top right portion of the screen to access a virtual hostess who could answer any and all questions.

A hostess greeted respondents and explained the survey to them. They watched an advertisement and then answered a series of questions about the ad. The questions addressed topics such as enjoyment, likes and dislikes and imagery as well as questions that were developed to calculate the Awareness Index (AITM) and the Persuasion Score (PS). AITM reflects the "emotional" strength of the ad and PS reflects the "rational" strength of the ad.

After answering questions about the ad, respondents viewed the ad again and in real time indicated their interest in the ad. The Interest Trace is a real-time moment-by-moment response to the ad. Respondents watch the ad and move their mouse to the right as interest increases and to the left as interest decreases.

As the dates above reveal, the on-line and off-line tests comparisons were not done at the same time. More important, the off-line phase used an animatic as the advertisement while the on-line phased used the final creative. We have compared the performance of animatics and finished creative across numerous categories with 300 actual creative executions. As a result we knew where we expected to find significant differences. We have found in internal tests that the correlation between the interest trace of an animatic and the finished film versions of an ad are in the realm of .85.

Results were quite straightforward. It is vital to this methodology that respondents have broadband. The panel company received numerous complaints from dial up panel members about the time for downloading. In contrast, not one complaint was lodged by broadband subscribers. Clearly, the method of access is an issue and future work can only be done with people who have broadband Internet access.

In the main, response patterns were the same between the two methods. The major difference between the two methods was in the interest trace. The off-line method collects data every millisecond on a plus/minus 264 scale. The on-line method collected information every frame on a plus 30 scale. The results between the two data capture methods were not comparable.

As a result of the difference in data capture, the routine that collects the interest trace information was rewritten to collect data in a broader scale.

Once this phase of the study was completed we were confident that the software would work and we could complete the actual comparison of the off-line and on-line methods.

Methodology – Head-to-Head Comparison

Design

As was the case in Phase One, the experimental design was a single-factor between-subjects design. The factor was in-person completion of the LINK[™] questionnaire (off-line) versus Internet completion (on-line).

Sample

As was the case in the Phase One evaluation, only English speaking Canadians participated in the study.

One hundred people were recruited to complete the off-line test on February 17, 2004. Standard telephone recruiting was used and all respondents were paid \$50 to complete the project. The task was completed in the Link[™] facility at Yonge and Sheppard. This was the evaluation that used the Nissan creative. As a result, respondents were screened to ensure that they were in market for a new vehicle (mid size SUV) and accepters of imported vehicles.

One-hundred people were recruited for the on-line test. Respondents were recruited from a panel of respondents that Delvinia represents in Canada from GMI. This panel is essentially reflective of the Canadian population as a whole. The skews of the panel are the same as the skews of the general Internet population. Table 1 shows the difference between the portion of the

Demographic	On-Line	Off-Line	Statistical test
Gender			χ ² = 1.62, n.s.
Female	52	43	
Male	47	56	
Age			$\chi^2 = 12.677, p < .05$
Under 25	13	7	
25-34	22	18	
35-49	37	23	
50+	28	51	
Children at home	57	43	<i>z</i> = 2.038, <i>p</i> < .05
H.H. Income			$\chi^2 = 25.774 \ p < .05$
under \$30K	15	37	
\$30K-\$59K	29	37	
\$60K and above	49	17	
(sample size)	(904)	(460)	

Table 1 – Demographic Differences amongst On-line and Off-line

Canadian population that is on and is not on the Internet. The data has been taken from the Consumer TrendZ Report, an annual survey of Canadians that has been completed by Millward Brown Goldfarb since 1980. As the Table shows, there is no longer a gender difference between

the on-line and not on-line portions of the population (Chi-square = 1.62). In general, younger people are more likely to be on-line (Chi-square = 12.667, p < .05), as are higher income households (Chi-square = 25.774, p < .05).

A total of 30,000 recruiting e-mails were sent out on February 26, 2004. These were sent to all panel members and not just broadband subscribers. The high number was required because the specs (including the need to be in market for a new vehicle in the next 12 months) meant that the incidence was roughly 7%. The same recruiting specs were used in the on-line portion as the off-line portion.

Region	On-Line	Off-Line
Atlantic	6	0
Quebec	6	0
Ontario	40	0
Toronto	N/A	100
West	34	0
BC	10	0
(sample size)	(110)	(108)

Table 2 – Geographic Breakdown of the Two Samples

The main difference between the off-line and on-line recruit is geography. The off-line sample came from Toronto, while the on-line sample was more representative. The low response rate in Quebec is the result of an English only evaluation. The skew to the West is the result of the "truck like" nature of the sample.

Methodology

The typical off-line LINK[™] procedure is as follows. Participants are ushered into a room that contains 20 lap-top computers. The nature of the task, i.e., a brief discussion about the computers, using the mouse and watching things and answering questions is given to the entire group. Participants are told that they can ask the hostess questions at any time. Each participant then puts on a set of headphones and completes the task "in silence."

The task follows this general pattern. Participants view a warm up reel of four commercials and answer dummy questions about the first ad in the reel. The test ad is the second ad in the reel.

A detailed set of questions about enjoyment, branding, likes, dislikes and product/category specific issues (to name but a few of the question areas) are then presented to the participants. After all these questions have been answered participants complete the interest trace (described above).

The main difference between the off-line and on-line is in the recruiting. Off-line is a "recruit to central" while the on-line has a sample from the entire country. This means that the on-line sample will be more representative of the entire country. Moreover, respondents in the on-line survey can complete it at their leisure, thus it is less of a convenience sample, insofar as it does not demand that respondents be available on a specific day and time. Aside from the above, the on-line LINK[™] procedure is essentially the same as the offline procedure, with the exception that the on-line hostess is "virtual."

Results

The Two Samples are essentially the same

Although minor, there were some differences between the demographic make up of the on-line

Demographic	On-Line	Off-Line	Statistical test
H.H. Size	3.17	3.3	<i>t</i> = 0.706 n.s.
Employment Status (%)			z=1.77, p<.05
Full Time	67	79	
H.H. Income (\$)	91,700	110,200	$t = 8.99 \ p < 0.5$
Age (in years)	38.1	40.5	t = 2.34 p < 0.5
Gender (%)			χ ² = 3.26, n.s
Female	35.5	52	
Male	64.5	48	
Current Ownership			χ ² = 7.70, n.s
Coupe	19	24	
Sedan	55	74	
Hatch	7	12	
MPV	22	22	
SUV	34	26	
Pick-up	12	5	
(sample size)	(110)	(108)	

 Table 3 – Demographic Difference between the Two Samples

and off-line samples. As Table 3 shows, the off-line sample had a higher proportion of people who were employed full time (z = 1.77, p < .05). The off-line sample had a higher average house hold income (t = 8.99, p < .05) which stems from the fact that the off-line sample was only from Toronto. The on-line sample was significantly younger than the off-line sample (t = 2.34, p < .05), which simply reflects that the on-line universe skews younger than the general population. There was no difference between the on-line and off-line samples in terms of ownership as described by body style (Chi-square = 7.70, p > .05).

In the main there is no reason to suspect that the two samples are not comparable.

Broadband gives the same results as off-line for Quantitative measures

One of the main reasons for the study was to evaluate the degree to which a broadband survey replicates an off-line survey. The LINK[™] methodology has a number of proprietary measures and benchmarked questions that have been shown to be reliable and consistent predictors of behaviour.

Measure	On-Line	Off-Line	Statistical test
AI	3	3	NA
PS	6	16	NA
Enjoyment	3.75	4.09	t = 3.794 p < .05
Branding	3.14	3.56	t = 26.95 p < .05
Appeal	3.72	3.91	<i>t</i> = 1.62 n.s
Relevance	2.55	2.69	<i>t</i> = 1.19 n.s
Believability	2.52	2.83	<i>t</i> = 3.44 < .05
Music	3.27	3.38	<i>t</i> = 1.11 n.s
(sample size)	(110)_	(108)	

Table 4 – Differences Between the Two Samples on Key Measures

As Table 4 shows, the two methods gave very similar results. The AI measure was the same for the two methods, as were the Appeal, Relevance and Music measures (all t values less than 1.96). Overall, scores are higher for the more emotionally charged measures such as Enjoyment (t = 3.79, p < .05) and Branding (t = 26.95, p < .05), as well as Believability (t = 3.44, p < .05). This pattern of results is something we have found in other work comparing differences between "social" and "non-social" research situations. Social research situations are those where other

people are around to place social demands on response. Typically, these are telephone and face-to-face interview situations. People tend to give higher ratings to emotional questions in social situations than when responding in more solitary situations.

Figure 3 shows a scatter plot of all quantitative measures from the on-line and off-line samples. Although the data does not have a perfect one-to-one slope the overall fit of the line is excellent (R2 = .95, p < .05). The plot shows a nice spread of data across the scales with no evidence of any outliers. This is further evidence that the on-line methodology is comparable to the off-line method.



Figure 3 – Correlation between On-line and Off-line Key Measures

Open-Ended Responses are also Quite Consistent

The above results suggest that the on-line results are essentially the same as the off-line results in terms of quantitative measures. Frequently, people raise concerns about the quality of openended responses in the on-line domain. The argument tends to be that in the absence of human questioning and probing, respondents will skip the open-ended questions all together, or they will give minimal responses. The next three charts present the netted open-ended responses from three different open-ended questions as a means of determining the consistency in response between the two methods. In the standard LINKTM study all respondents are asked to describe the entire ad as if they were telling someone about it. As can be seen in Table 5 the same percentage (99% versus 100%) answered the question. The correlation between the response pattern of the two methods is quite high (R2 = .799, p < .05). This means that there is a great deal of consistency in the open-ended responses. Situation (92% on-line versus 97% off-line), brand (46% versus 45%), product (43% versus 44%) were given the same level of mention. Off-line respondents tended to giver higher mention to execution type elements (Copy – 36% versus 57% and Music – 10% versus 21%). On-line respondents tended to give higher mention to product type elements such as Vehicle appearance (36% versus 19%).

Mention	On-Line	Off-Line
Total giving mention	99	100
Situation/visual description	92	97
People	38	15
Brand Mentions	46	45
Product visual descriptions	43	44
Сору	36	57
Vehicle appearance/design	36	19
Exterior design	15	5
Interior design	8	3
Slogan recall	31	29
Voice over	27	25
Music	10	21
(sample size)	110	108

Table 5 – Difference in Open Ended Responses, Ad Story

Table 6 shows the open-ended data for the memorable parts of the ad. Each respondents is asked to indicate what they feel are the most memorable part of the ad. Once again the same proportion of respondents from the on-line (96%) and off-line (95%) gave a response. Likewise, the correlation between the two sets of data is quite high (R2 = .918, p < .05). This set of data tends to mirror the results in Table 5. The situation was equally memorable for both groups (66% on-line versus 64% off-line), while product was more memorable for the on-line participants (29% versus 19%) and slogan was more memorable for the off-line participants (26% versus 16%).

Mention	On-Line	Off-Line
Total giving response	96	95
Situation	66	64
People	5	6
Product visuals	29	19
Slogan	16	26
Content	12	9
Brand mentions	7	2
Сору	6	10
Dialog	5	9
Vehicle appearance/design	6	11
Exterior design	5	7
Good design	3	3
Interior design	1	2
Music	3	7
(sample size)	(110)	(108)

Table 6 – Difference in Open Ended Responses, Memorable Part(s)

Ergonomics – Evaluation of the Survey Tool

In addition to evaluating consistency between on-line and off-line methodologies, it is important to ensure that the survey tool is at least as user friendly as current industry standards.

Most off-line research uses CATI (Computer Assisted Telephone Interviewing) which puts no response burden on participants. However, Internet-based surveying has increased significantly over the past five years. Yet simple inspection of most Internet surveys suggests that little thought has gone into the ergonomics or user-based principals that would make these systems simple and easy for respondents to use. It appears instead that, aside from the use of radio buttons and the odd sliding response scale, that most people simply translate a word document into an HTML survey.

One of the main goals of the broadband tool developed for this use was to build a well-designed, user friendly tool that made it easy for respondents to complete a survey. At the end of the survey a series of questions probed the actual survey experience.

Figure 4 shows that a majority felt that this survey was better than surveys they have done in the past. Fifty-one percent felt that the survey was better and an additional 33 percent felt it was the same.



Figure 4 – How does this survey compare to others you have done?

More specifically, respondents found the survey to be easy to use, easy to navigate and just under half were very satisfied with the download time (see Figure 5). Roughly two thirds of all respondents (60%) found the survey easy to complete. Moreover, three-quarters (73%) found the survey easy to navigate through. Less than one half (48%) were very satisfied with the time it took for the video to download, but this is as much a function of computer hardware and limitation of the Internet at present as it is the survey tool.



Figure 5 – Ease of use

The interface and guide contained within the survey tool were quite new and novel. Some have suggested that on-line surveys should be the same as traditional paper-and-pencil surveys and contain as few embellishments as possible. This implementation contained a virtual guide who could be accessed at any time and answer questions.

As Figure 6 shows, response to the guide was quite positive. A majority (58%) had a very positive impression of the guide. When asked "what was your reason for saying that", more than half (57%) gave a response.



Figure 6 – Positive Impression of the Video Guide

Most of the responses were positive and indicated that the guide was helpful. A minority felt that the guide was not needed. Very few (3%) indicated a preference for an in-person guide.

Respondents were also asked about their impression of the user interface (the look and feel and the "guide"). A majority (52%) had a very positive impression of the interface and a third (33%) had a somewhat positive impression (see Figure 7). Most responses to the interface were positive (see Figure 7) and focused on such thing as ease of use (27%), design (18%), and the fact that it works well (12%). Seven percent mentioned that it was fast/quick. Nonetheless, not all feedback was positive. Some felt the screen was too small (8%), or download time was too slow (5%) or the survey was too long (4%), which is technically not part of the interface.



Figure 7 – Impression of the User Interface

The Business Case for Broadband

In addition to standard market research evaluation criteria, the study was designed to look at the business case for broadband research. On many levels the use of the broadband methodology makes good business sense.

Geography

Historically, advertising testing and evaluation products, such as LINK[™], have required some sort of face-to-face method. This could be recruiting to central location, or mall intercept. All of these methods are either time challenged or geography challenged. Mall intercepts require the time to get information to various malls, have terminals set up and then recruit people to complete the survey. Geographically, malls have better coverage than a single recruit to central method but both ignore fairly wide portions of the population.

The broadband alternative has none of these limitations, and instead offers the chance to collect data from the entire country.

Timing

In the typical off-line LINK[™] study, with recruit to central, recruiting takes at least 5 days and field prefers to have 2 weeks in order to ensure 100 respondents show up. As a process, the questionnaire is being developed (typically one day) and programmed (typically one day) while

recruiting is underway. This one to two week lag tends to be used by clients and agencies as a buffer to get creative (either animatics or finished film) completed and delivered.

In comparison, the on-line method takes no more than 3-4 days to complete programming, recruit and complete all surveys. The evaluation completed for Nissan had an incidence level of less than one percent (a fairly exclusive set of economic indicators plus purchase within a specific automotive category in the next 12 months) and was in field for one day to get the 100 completes.

Cost

A reduction in timing is a reduction in cost for supplier and client. On the supplier side there are fewer administrative costs and reduced professional costs. On the client side, faster turn around simply means that there is less time to spend with suppliers which reduces the costs associated with the project.

The above are "soft" costs or indirect costs. In terms of direct costs, the overall cost of the on-line and off-line projects was the same. Although all market researchers wish that on-line research would cost less than off-line research this is not the case.

Implications

The broadband revolution will change survey methodology more profoundly than did CATI. The broadband methodology marries the speed of response and control over skip patterns associated with CATI with the ability to show visuals associated with face-to-face. Moreover, this is the first time in the history of market research and public opinion polling that we have been able to offer simple, easy-to-use research tools to our respondents that show moving stimuli.

Two main drawbacks exist with the methodology at present. First is that there is a significant downward shift in measures. Although Figure 3 shows that the correlation between off-line and on-line methods are essentially the same, we see from table 4 that scores are lower for on-line than off-line. Normative data bases will change with a move to on-line. This will be a larger issue for clients who move off-line measures on-line when the measures are used for internal performance bonuses. The slight attenuation in scores from off-line to on-line will require either a corrective algorithm or the development of new norms.

Second is the continued fear that the on-line universe is significantly different than the off-line universe. As response rates to RDD telephone surveys continue to fall this argument becomes moot. As long as on-line panels are built and maintained to the same standards as off-line panels we should have the same degree of confidence in our on-line research as our off-line research.

Our industry will always have sample challenges and the use of broadband technologies and online methodologies will not solve all of these challenges.

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Stephen Popiel, Ph.D., is Senior Vice President, Research & Development at Millward Brown Goldfarb. He has always complained about poorly designed software/computer systems and now may have helped to develop one. He hopes that time will demonstrate that this is an ergonomically sound and user friendly survey system.

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