

## Ten Years of Research on Research in the US:

### Synovate's Contributions to Understanding the Potential of Online Fielding

#### Introduction

Synovate has substantially advanced the acceptance of Online research today, based on contributions of highly regarded quality research on the topic over ten years. The following provides a brief overview, highlighting major contributions over the years. This survey concludes with a brief summary and proposed paradigm for future studies.

#### 1994 – Pre-Online research issues: Are people who join and participate in multi-purpose panels different?

It is important to recognize that the methodological concern articulated upon the arrival of Online research in the late 1990's was not entirely in direct response to the *Internet* component of the fielding technique. Rather, prior to the introduction of Online research options, vocal segments of the market research community evidenced a pre-existing concern with the *representivity* of the household-panel-based samples that would eventually serve to provide the respondents for Online consumer research. Put simply, due to anti-spamming laws, Online respondents are required to opt-in before engaging in research, and this in turn necessitates empanelling them prior to delivering a survey. Will this panel-based sampling requirement pose a problem?

In 1994 Synovate (then Market Facts) published a research paper comparing panel-generated telephone sampling vs. a random sample/RDD (Research on Research Publication No. 59). This research would reemerge with renewed relevance with the emergence of the Online approach some four years later. Synovate's "mail panel" was used to provide a comparison to a random (RDD) sample on characteristics commonly used in marketing and public opinion research. The findings established several points confirming the viability of a panel-based sampling approach, including:

- The two samples did not differ meaningfully on most diverse measures of behavior and lifestyle.
- Both samples showed similar purchasing and shopping patterns, and were equally likely to own in-home computers (about 34%) and telephone answering machines (about 65%).
- Both samples were about equally likely to have consumed an alcoholic beverage during the previous week, indicating comparability in responses to potentially intrusive questions.
- Surveys completed by panel respondents contained less missing data than those completed by RDD respondents.
- Lack of evidence of a "positivity bias" (or "yea-sayers") among panel respondents.

This research, conducted as it was in the absence of concerns about the Internet, was able to establish the usefulness and appropriateness of the sample which in a few short years would fuel the dramatic migration to Online research.

Further support would be forthcoming in research published in 1999 based on Market Facts data (Bickart and Schmittlein, "The Distribution of Survey Contact and Participation in the United States: Constructing a Survey-Based Estimate," Journal of Marketing Research, May, 1999). Finding that 20-23% of US adults account for all survey responses in a year, the authors raise the possibility that 77-80% of US adults are unreachable by any means, including the most rigorous RDD and random approaches. Thus, the criticism of the non-random nature of panel samples is predicated on the preferability and availability of true random approaches, yet these are shown not to be operational, despite their merits in theory.

### 1998 - Project Landmark: Precisely *Who* is Online?

From the inception of Online Research fielding in 1998, Synovate (then Market Facts) contributed to the need for research on research knowledge to assure the proper use of Internet-based surveys. "Project Landmark," released in August of 1998 took as a challenge understanding the differences between the nearly one-third of the US population in 1998 known as internet "netizens," as compared to the offline population. At that time the burden on explaining differences in demographics and research results landed squarely on the shoulders of the new and novel Online fielding entry. Exploration was designed to establish if the Internet, "as an entity itself, is impacting a person's basic beliefs, attitudes, and behaviors." What was missing from the industry-wide conception of the problem at that time was that all fielding modalities, even established ones such as mall intercept, phone, and mail, are media, and, as such, are capable of contributing to the demographics and content associated with those responding.

Based on the need to validate Internet surveying at the time, the design called for a two-cell study drawn from the Market Facts' Consumer Mail Panel balanced on key demographics, with one cell representing the general population, while the other was comprised exclusively of Internet users (defined as having used the Internet at least once in the past three months). Both cells were administered through the mail, however, insuring comparability, but not anticipating the concern that would emerge a few years later that the same respondent might respond differently Online versus off.

Key differences were identified in acceptance of technology and technology-related products, newspaper readership for general news and business, business weeklies, credit card usage, and so on. Interestingly, most of the comparisons between the two cells yielded no significant differences (e.g., TV viewership, attitudes and use of frozen foods, convenience foods, fast food restaurants, and health and beauty products). Of the 65 food product categories examined, only six yielded statistically different frequency of usage patterns. Likewise, usage of 14 beverage categories yielded only one correlation to Internet access.

The report also considered psychographics, and was able to identify broad consensus between the groups, with the exception of elevations among Internet users in attitudes towards technology, and self-assessments of innovativeness, which might correlate with a willingness to try new products relative to the then mainstream population. Brand loyalty levels, however, were roughly comparable across the two groups. Some 17 other attitudes and preferences were also surveyed, registering no significant differences between the groups.

The study concluded with the – for then – surprising but reassuring finding of a "lack of any consistent or defining differences in attitudes or behaviors between the Internet sample and the general population," outside the areas of technology, media habits and a few other areas. This white paper went a long way to demystifying Internet methodology, and was presented at several industry conferences with general acceptance. Market Facts was an especially credible source for delivering the message, based on panel experience dating back to 1949, as well as its experience and ability to field in all modalities, not just the one being advanced by the emerging Online specialty shops of the day. With no particular agenda, and a commitment to fielding as particular clients preferred, Market Facts contributed to advancing discussions of Online fielding beyond sales-pitch and counter-resistance, to informed, open debate.

### 2000: Online versus Telephone Product Testing:

With the bulk of industry work focused on the appropriateness of Concept Testing Online, Market Facts turned, in conjunction with client Kimberly-Clark, to Product-Use Testing for a thorough review. The "speed-up" time for product testing Online is not as dramatic as it is for Concept Screening, for example, due to the in-home usage/trial periods being the same for both cells. Any savings in post-usage reporting time might be a small fraction of the total elapsed time from study start to finish. Thus, pockets of resistance to Online fielding found safe harbor in product testing, where researchers with moderate concerns about the appropriateness of Online fielding did not have to consider the counterbalance of dramatic savings in time. The risks outweighed the rewards.

This research identified benefits inherent in Online fielding which resistant researchers had failed to consider when rejecting product testing with an Online reporting component. The most important of these was the finding that Online protocol quality was higher and richer than those collected over the telephone, especially for sensitive topics. The authors identified "heightened open-ended responses" over the Internet: 40% of Internet respondents provided four or more mentions, compared with only 14% of telephone respondents.

Responses were more thoughtful, the authors concluded, and perhaps more honest, given the elimination of interviewer bias over the Internet. A related finding was that the Internet cell provided more negative elements in evaluating the products, consistent with the honesty/sensitivity factor described above. However, the *relative* ratings between products A, B, and C remained consistent, indicating that the two methodologies would support the same business decisions. Those business decisions, importantly, would necessarily be better business decisions when responses were collected Online, informed as they were with critically important issues about the product usage experiences not forthcoming over the telephone.

The lasting contribution of this study was to move the focus of discussion away from "enhanced speed" as the only measurable benefit of Online research demographics – and even remove the debate from psychographics – to an appreciation of the quality of response benefits accruing to recipients of Online research. The richness of the open-end, the negative reaction and candor on the sensitive topic were emerging from the clutter as critically important benefits that Online research provided better than any other approach.

#### 2001 - Further refinement; testing Online *fielding* with Mail *fielding*

By August 2001, fielding methodology as well as Internet access became the subject of in-depth study via parallel testing of concepts from 25 food and household product categories. The goal was to focus on demographics as explanatory differences between Internet and mail panel results. Demographic comparability had improved greatly since the 1998 study, improving the predictive relationship between Online and offline validation results. Using a client-suggested criterion, this research showed that the same business decisions would be made regardless of fielding method (top-box and top-2-box PI scores).

Recognizing the potential benefits of delivering stimuli Online versus mail, this study also assessed the impact of color (Online) relative to black and white (mail) on concept scores. While the study found no impact of concept pictorial format, it anticipated the benefit of engaging stimuli in the service of increasing respondent engagement and reducing drop out during testing.

One finding, curious at the time, documented that Uniqueness scores were typically lower on Internet than on mail. It was postulated at the time that Internet-active individuals may hold higher standards for uniqueness, given their exposure to new and novel technology, relative to less- or non-Internet active households. Importantly, this finding paved the way for the recognition of psychographic components beyond demographics in assessing factors affecting differences in Online scores relative to offline.

#### 2002 - Client-Specific Parallel Studies

2002 marked a series of client-specific parallel testing in an ePanel that had reached nearly 300,000 households. The goal was to work primarily with consumer package goods companies with large stores of concept screens collected offline who desired to move Online, but who wished to build meaningful bridges to their historic mail-fielded databases in the interest of preserving valuable repositories of knowledge. Purchase Interest and Uniqueness again were typically the two scores identified for special attention. For example, in a ten-category study for one client, comparable results were found across 88 different parallel tests, enabling model development to provide calibration for both measures in all ten categories. Where "outliers" were identified, those concepts were further explored through rigorous demographic and concept-specific study. What is significant about these kinds of explorations is the sharing of the burden of explanation by both the Internet and the mail

modalities. Where the original “Project Landmark” Study of 1998 looked to identify flaws exclusively in the Internet cell, by 2002 both client and supplier recognized the need to assess objectively the strengths and weaknesses of all fielding techniques, even if it meant adjusting one long-held “truth” to another emerging Online perspective on consumer research.

### 2003 – Understanding Online Panel Control Variables

A 20-cell test was conducted with 10 replicated pairs of concept screens late May/early June, 2003 specifically to address challenges to panel operations provided by specific clients, as well as to gauge which factors are most crucial to control for stable, valid results. Each concept was tested twice with exactly the same treatment in terms of timing and sample. Two concepts were tested: 1) a laundry product, and 2) a food product.

The outgoing sample (of 1500) in each cell was balanced on seven variables: tenure on the panel (3 groups), recency of last panel contact, geographic region, population density, income, head of household age, and household size.

The following three factors were examined in the study design: use of job-specific eliminations (restricting access to respondents who might have participated in research on the category/brand, other related dimension, within specified period of time), job timing in terms of day of launch (weekend versus weekday) along with length of time the project was in field, and placement of Brand/Category Usage questions before versus after concept exposure/collection of Purchase Interest.

The ability to test these variables was built into the 20-cell design outgoes, and additional variables were examined for their contribution or impact on Purchase Interest: effects of a reminder/2<sup>nd</sup> launch to decrease the non-returner base, and a wide variety of household characteristics – demos like education as well as reported participation in other consumer panels, use of the Internet at home, “diffusion” segment (segmenting people on their propensity to adopt), level of reported enjoyment with Internet use, number of hours spent on Internet, buying habits Online, speed of connectivity, home/work Internet usage, etc.

Results were largely encouraging, and lessons learned from the study were implemented. Purchase Interest scores across the replicated pairs were very consistent. Only one significant difference in top-2 box (and none in top box) was observed across the 10 sets. Length of time in field made no measurable difference in PI scores. Weighting data to achieve to compensate for distribution within the ending sample narrowed the range of scores but had virtually no real effect. Purchase Interest was slightly higher among respondents newer to the panel, and controls for study recruitment composition were implemented based on this finding. Recency of last contact, however, had no effect on claimed PI. Brand/Category usage questions presented prior to concept exposure resulted in suppressed Purchase Interest. Based on this finding, recommended guidelines were established for consistency across studies. Relatively strong relationships were detected between concept Believability ratings, brand used/brand used most often, frequent category usage, buying style segment), diffusion segment and Purchase Interest.

### 2004 – Full Circle

In 2004, Synovate completed a restudy of the 1994 findings of comparability between telephone studies conducted with RDD versus panel-contributed sample. The goal of the study (“Consumer Panelist Versus Random Digit Dial Respondent Performance Revisited: How Similar and How Different, Research on Research Publication No. 64) was to eliminate any consideration of offline versus online by eliminating the internet from the equation. This enabled a direct comparison of the appropriateness of the panel fielding underlying the Internet approach to non-panel fielding. Panel results were shown to match non-panel results within established statistical guidelines while adding significant operational benefits. Specific attention was paid to open-ended and unaided awareness sections of the surveys to establish comparability from RDD to panel. Potential “positivity biases” and other symptoms of overly “professional respondents” were explored and found to be non-factors in influencing results.

2005 -The Emerging Paradigm

Synovate is now well positioned to assist clients wishing to migrate Online from any modality. Standards have been established for identifying five key factors for assessing differences in results: (1) demographic, (2) panel effects, (3) psychographic, (4) perceptual, and (5) interviewer presence/absence. The migration from mall intercept to Internet is the most complex, involving all four factors, while only two of the factors may be at work when moving from postal to Internet. Additionally the move to high-speed connectivity – now fully 1/3 of US Internet households are connected via broadband – has enabled Synovate to explore streaming video, virtual prototyping, and other enhancements to reinvent the potential of research on the Internet.

Plans for further Research on Research for 2005 and beyond include a study of heightened candor online due to self-administration, as well as the publication of guidelines for online questionnaire design.