



European Online Parallel Test Results Calibration Research Study



Unravelling the Mysteries of Online Respondents

The market research industry has not been immune to the Internet revolution – in the space of a few years, online research has gone from niche beginnings to a multi-million dollar industry. Agencies are investing heavily in their global capabilities, whilst clients are eager to access the benefits of speed, cost and technical possibility that online research techniques offer.

However, if this growth is to continue at this unprecedented rate, we need to be clear about the implications of conducting research online. What is the effect of switching my research from existing offline techniques to the online environment? When can I consider switching to online approaches? Will this work in all markets or for all categories?

This study focuses on understanding the issues above and the difference between the general population, Internet users and members of the Lightspeed Consumer Panels.

This research was conducted in the UK, France and Germany. It was undertaken by three members of the Kantar Group: Lightspeed Research, Research International and Millward Brown.

How Different is Online Research?

Online research is not black magic. It is, after all, just another way of collecting research data. We simply have to consider how and when it is most appropriate to use, just as we would with postal, telephone or face-to-face research.

In many instances we feel online research is perfectly valid and will produce the same findings as any offline study and, we believe in certain cases, will actually provide a higher degree of quality and accuracy.

However, if we conduct the same research study via online and offline methods, we may get slightly differing results. These may be fairly minor variations in absolute scores or perhaps more significant shifts. So what drives the difference between online and offline results?

Essentially we believe that there are two key factors:

1. Data collection effects

These are issues related to the way respondents complete surveys online compared to offline and hence do not change dramatically over time. In this instance, the key difference is that there is no interviewer and this is a self-completion survey.

2. Respondent differences

There may be some effect caused by our respondents being Internet users. Are they typical of the population we want to research? Are they somehow attitudinally or behaviourally different to our target audience (perhaps an issue when the majority of the total population are not online)?

To an extent, the issues raised in point 1 are nothing new and relatively straightforward to deal with. We face these in any self-completion survey and they are largely related to the lack of an interviewer rather than any specific issues related to online data collection. In some cases, these differences may be entirely positive to the research process. Self-completion research may lead to more openness and honesty for certain types of questions or subject areas. However, in most cases, we can anticipate and account for these through previous research experience and calibration exercises.

The issues in point 2. – differences in online respondents themselves – represent more of a “moving target.” The penetration of the Internet is changing rapidly and may be at different stages of development in different countries, social groups or amongst users of certain products. Before commencing a research project, we need to assess how these potential respondent differences will affect our study. This became the focus of a recent research and development exercise.

Our Test Approach

Lightspeed Research, along with its sister companies Research International and Millward Brown, undertook a major piece of research to examine how different online users are from the general population and how different are online panellists.

A nationally representative sample of 1,000 interviews were conducted in each of the UK, France and Germany. The project covered behavioural, attitudinal, usage and awareness questions

across a wide range of categories from chocolate and detergents to finance and technology. We were then able to look at differences between 3 key sample groups:

- A sample representing the total national population (600 per country – accessed through random digit dialling – RDD)
- A sample of home Internet users (a subset of above – at least 240 per country)
- A sample from the Lightspeed online panel (300 drawn to represent the national population)

In order to ensure that we removed any data collection effects and that we were just looking at “people” differences:

- All interviews were conducted by telephone
- All of the subgroups were weighted to match the national population profile (so that there were no demographic differences between the groups)




The findings provide an interesting insight into the key questions confronting clients considering online research.

How Different are Online Users?

Are online users from Mars?

No, online users are perhaps more mainstream than you think. In terms of fundamental demographic measures (presence of children, working status) they are quite similar to the general population. Yes, online users represent a generally younger cross section of the market. However, with over half the UK adult population with Internet access and France and Germany not being far behind, online users represent an increasingly significant proportion of these societies.

Online users are broadly similar to the general population
Demographic summary (non-weighting variables)

						
	Total Pop.	Online	Total Pop.	Online	Total Pop.	Online
Average household size	2.8	2.9	3.0	3.0	2.9	2.9
Children under 18	37%	40%	41%	44%	42%	45%
Working (full/part time)	72%	76%	76%	81%**	78%	82%
Chief shopper	71%	71%	80%	80%	75%	75%

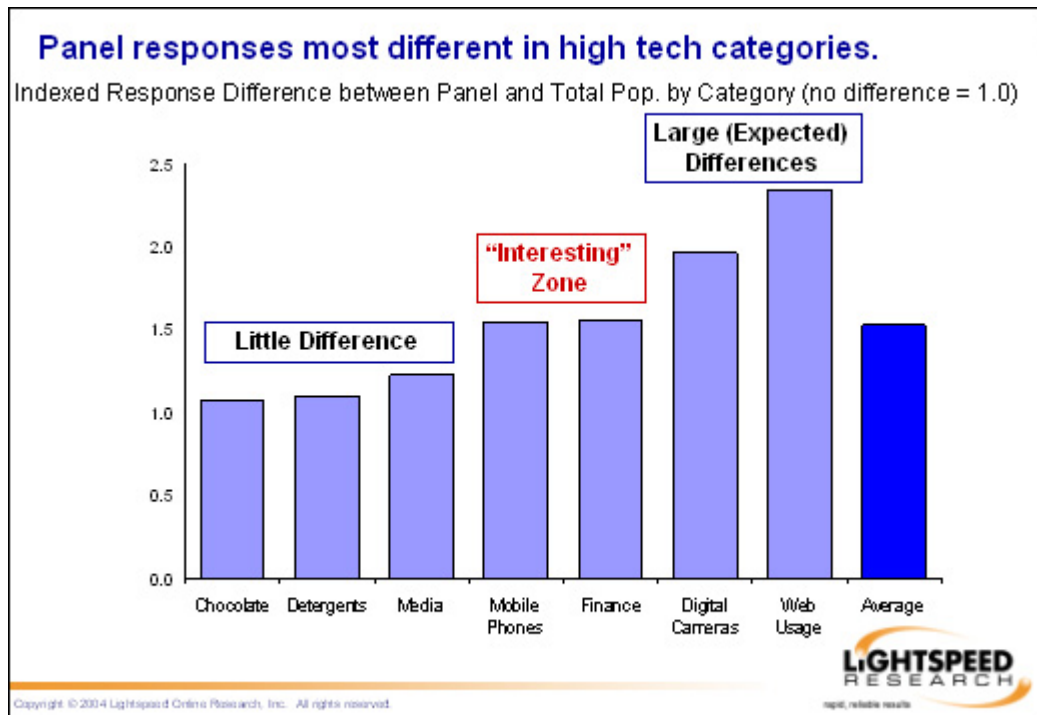
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Do differences vary by product category?

The answer is yes. Variations do occur where you might expect them, but not as much as you might think...

The key is to think about the category you are researching and be aware of the potential impact or skews that might arise.

The chart below gives an approximate summary of the relative variance we get between online panellists and the general population amongst certain key categories, taking into account both behavioural and attitudinal questions.



If we are talking about chocolate or detergents (or other basic consumer goods), there is no difference. But then, why should there be? Being online should not have a direct impact on the way we buy Mars bars or do our washing.

Interestingly, there are also few differences in the way online users consume media. We might think that Internet users would watch less TV or read fewer newspapers – we have not found that to be the case.

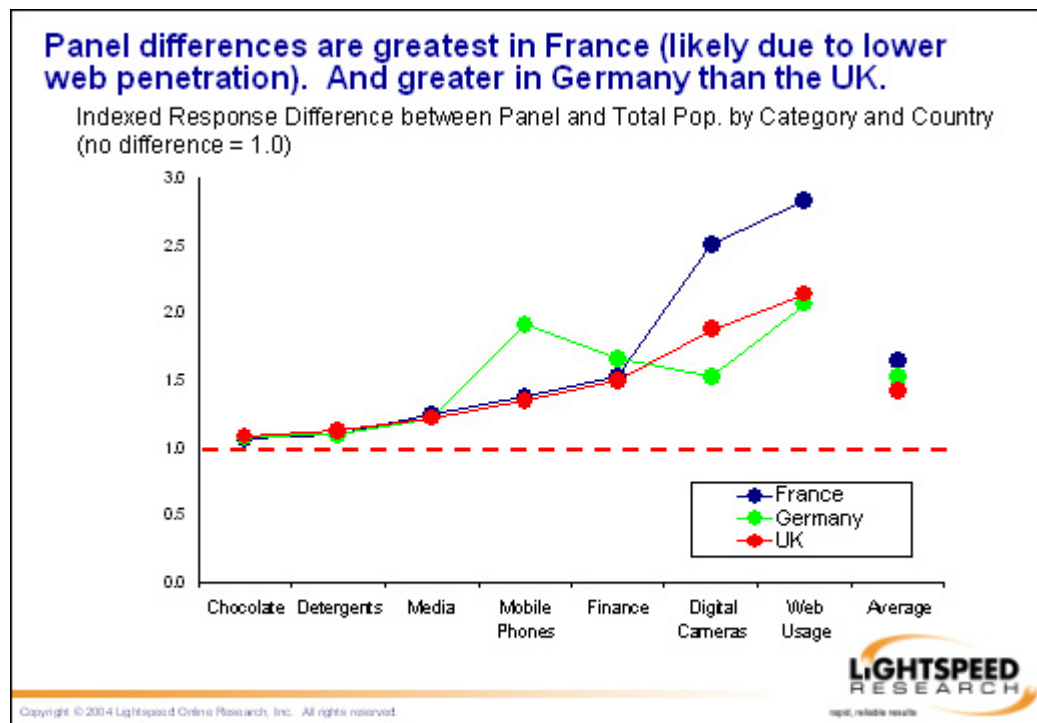
There are slight differences in mobile phone usage and finance. These are not major, however, driven by online users having a better awareness (rather than usage) of mobile Internet and a naturally higher usage of online banking – issues that we may need to consider, but which may not preclude us from conducting online research with these groups.

If we look at technology categories, such as the use of digital cameras and web usage, then online users cannot represent usage on a national basis. However, given the specific focus of these areas, we may only want to speak to subgroups of respondents who have access to this technology – here online research offers an extremely effective method of access.

Do differences vary by Internet penetration or country?

Yes, and differences are greatest where the Internet penetration is the lowest. However, if we look at the consumer goods categories, we see no significant differences. So, even in a lower penetration market such as France, an online approach may be perfectly viable.

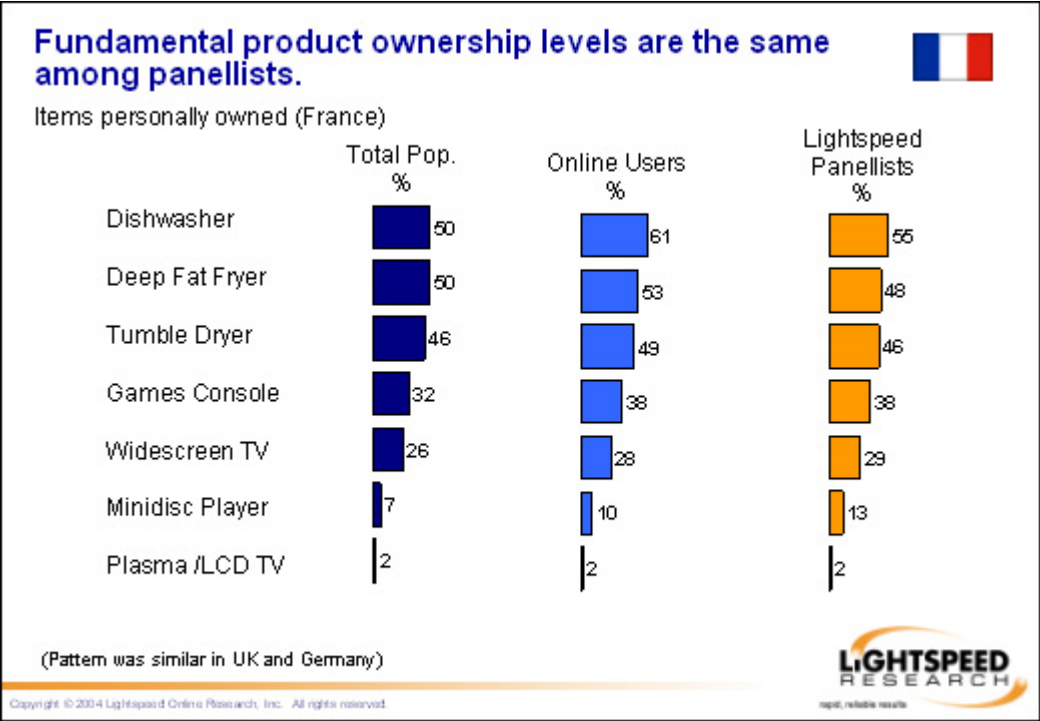
As mentioned above, the key is to consider the specific category to be covered.



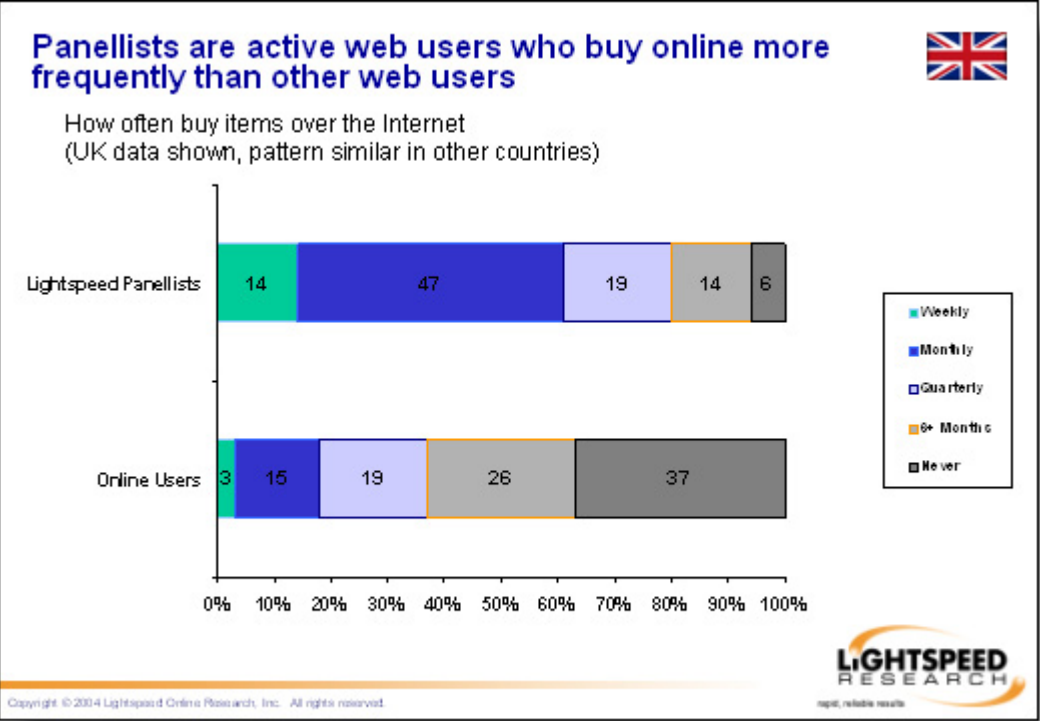
How Different are Online Panellists?

Are Lightspeed panellists representative of online users?

Yes, in most behavioural respects. For most categories their behaviour is no different to online users we might expect to meet through random sampling approaches.

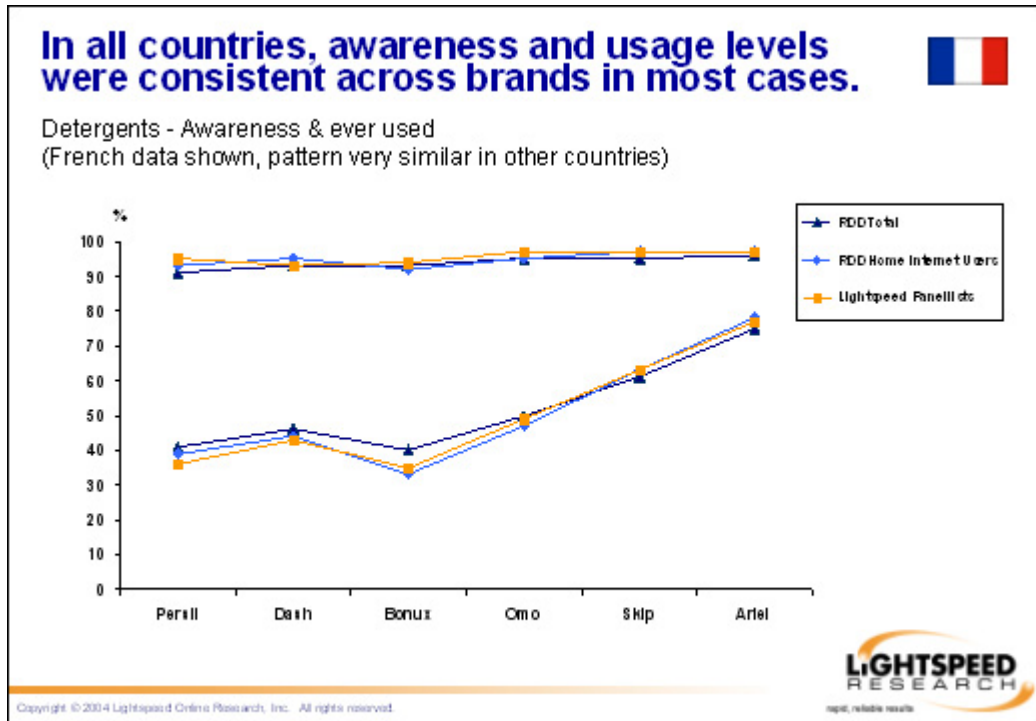


However, online panellists are more likely to be heavier and more active Internet users. This will have an effect on how they spend their time and money online. So, if we are looking at Internet usage and behaviour issues, we may need to consider additional sample controls (for example, on time online, or Internet purchasing) to provide a representative picture.



Do Lightspeed panellists answer questions differently?

Not noticeably. Lightspeed panellists tend to provide slightly richer and more educated responses, but basic satisfaction and attitudinal answers do not vary substantially.



What motivates a Lightspeed panellist?

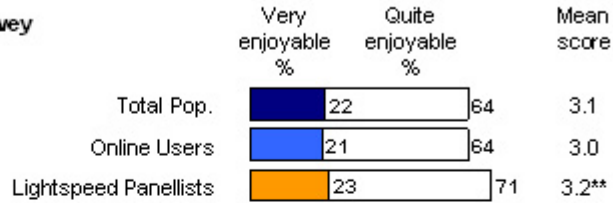
Lightspeed panellists like to be heard. There are two key factors driving this:

1. They are participators (including being active users of the web for information and other interactive services).
2. They have opinions (they are educated, are more likely to be decision makers) and are keen to share them.

Through high response rates and even enjoyment of the surveys, we can see a committed respondent base.

Even though this was a phone survey, panellists in all countries enjoyed the survey slightly more.

Question 53: Enjoyment of survey



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Are Lightspeed panellists more willing and helpful individuals?

Using an established psychographic framework (TGI’s Life Values analysis), we can see that Lightspeed panellists ARE generally a little more willing and helpful than the rest of the population in their basic approach to life.

But these differences are relatively minor – panellists’ Life Values are actually broadly similar to the rest of the population. If there are any interesting differences it is that panellists are not likely to be “materialists” but are more likely to leave their comfort zone to experience new things.

The Big Question: At the End of the Day, Do We Get the Same Answers?

Generally, yes – we can feel comfortable with this approach. We might get one or two brands shifting slightly, but rank orders on awareness and usage questions tend not to be affected, nor is media consumption.

Where there are no obvious reasons for difference, we see no difference. Where there are some reasons for difference, these may not be as drastic as we may have anticipated. We can feel confident that the differences observed as a result of using an online panel sample from Lightspeed Research will not result in different conclusions in our research study.

However, if you are thinking about an online approach, it is still important to check a couple of boxes before proceeding...

1. Ultimately, your research objectives will determine whether online is appropriate for the audience you want to reach. Use this study to consider whether Lightspeed Research can cover your category or research task effectively.
2. Do not forget the data collection issue – there may be some self-completion effects, which can easily have as much of an effect as the sampling issues observed here.

Of course, if you are in any doubt, you should contact your Lightspeed Research sales representative, who will be glad to advise. To contact a sales representative, please call +44 (0)20 7896-1900 in the UK, +1 (908) 630-0542 in the US, or +61 (0)2 9927-0020 in Australia or send an email to EU@lightspeedresearch.com. Alternatively, visit us at www.lightspeedresearch.com.