

The Technological Evolution

Adapting Research Techniques

Bite Sized Thought Piece

2009



The media landscape we live in today has never been more diverse and complex. As new technologies are introduced, old technologies evolve and converge. Consumers have more choice than ever before and each chooses to engage in different ways.

It has therefore never been more important to understand what consumers are doing and how they are responding to the myriad options available to them.

With increasing choice comes increasing confusion and we, as researchers, really need to consider what we ask and how we ask it to ensure the information we are collecting, and that our clients are basing business decisions upon, is relevant and as accurate as possible.



What should be simple isn't always so

Television has come a long way since the first black and white sets and the introduction of colour. As the penetration of digital TV has exploded, reaching 77% (Ipsos MediaCT TechTracker, Jan 2009), and with any type of multichannel platform nearing saturation, close to 90%, you might expect consumers to have an understanding of what they own. At a very simplistic level this may be true – is it TV through a traditional aerial, a satellite dish or an underground cable? However, the service providers offering these viewing platforms are no longer limited to just television. The convergence of their services means consumers buy into a brand and are rewarded with a combination of services – TV, landline phone, mobile phone and/or broadband internet. Virgin Media have a cable heritage but in a bid to promote their complete 'package' they offer TV in areas without cable in the form of a Digital Terrestrial Television (DTT) box. This box is Virgin Media branded, so are consumers able to tell the difference between DTT and cable TV services provided by the same cable company?

In the early days of multichannel television, a separate piece of equipment, in the form of a set top box, was necessary. Integrated Digital Televisions (IDTVs) are now the norm. Does the consumer always know they have purchased a DTT IDTV when they upgrade and connect their satellite or cable box? These are only a couple of examples and there are, of course, many others.

Technological research

As providers of media industry currency data Ipsos MediaCT has to keep on top of these changes. The TechTracker, a face-to-face omnibus, has been running since 1997 and is measuring all aspects of 'convergence'. DART, the Digital Audience Research Tracker, evolved in line with the technologies and digital interactive services it aimed to measure and understand, creating ENGAGE, and more recently ConnectionsMCT. ConnectionsMCT is an individual online multi-country study that looks at technology preferences used to access gaming, music and video content.

Adapting research techniques

One of the greatest challenges relates to the BARB TV Establishment Survey, which underpins the Viewing Panel. This pre-selected face-to-face household study provides profiling targets and is a source of recruitment for the panel. It collects demographic data and provides an audit of the household's TV-related equipment.

Ipsos MediaCT has been involved in the Establishment Survey since 1991 and we continue to be instrumental in implementing change to ensure the questionnaire is relevant. The learnings gained are then shared across all surveys conducted and managed within the company.

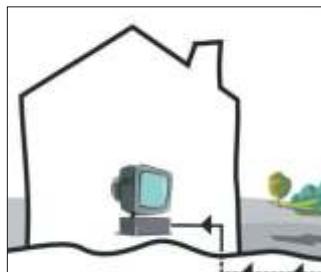
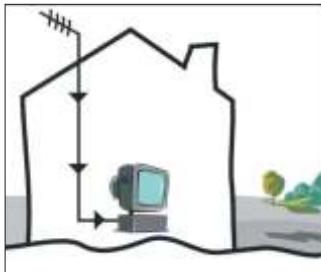
In 2000, the questionnaire became electronic with the introduction of CAPI (Computer Aided Personal Interviewing). This technique revolutionised the application of the questionnaire with its many TV set and household member iterations. An electronic script allows us to break down complex areas and ask questions in their simplest form to give a full picture of the household's set up. Conflicting responses can be identified and queried with respondents at source.



Traditionally the Establishment Survey has been completed by the Head of Household and/or the 'houseperson'. The first contact needs to be with one of these individuals, but today other household members may be better equipped to answer technology-related questions. There may be a 'wizkid' in the household who knows the answers. However, the 'wizkid' may not be at home at the time of the interview or they may not be a member of the household e.g. a son buys and sets up a new TV for his parents. In these instances we will offer a self-completion questionnaire to be completed and returned at a later stage by someone more knowledgeable. This will not replace the original CAPI interview but augment the data already collected, thus ensuring the results are as robust as possible.

In opinion-based research, interviewers are firmly instructed never to go off script. However, as the Establishment Survey is a factual survey, they need to probe and query if they feel they are being given inconsistent answers e.g. they can see equipment with a digital logo but the respondent claims not to have digital. Interviewers need to be technology savvy. In this respect relevant training is an integral part of the survey process via face-to-face briefings, hard copy literature and a web-based alert system.

There are other things we can do to help guide respondents. Hard copy show cards are no longer needed. Instead the computer screen is shared with the respondent so that images can be viewed electronically. TV channel logos can be incorporated alongside pictorial representations of platforms.





At Ipsos MediaCT we believe strongly that unless we go to great lengths to get these questions as accurate and understandable as possible, you risk obtaining data that may not be fit for purpose.

We can no longer assume a one size fits all either in terms of the technology people have at their disposal or their ability to answer questions about it.

For more information, please contact:

Mark Flood
Tel.: +44(0)20 8861 8000
Email: mark.flood@ipsos.com
www.ipsos-mori.com



Liz Landy
Tel.: +44(0)20 8861 8000
Email: liz.landy@ipsos.com
www.ipsos-mori.com

