FORUM

Research 2.0
Engage or give up the ghost?¹

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For decades the research industry has spoken about the issue of response rates. Although it is not the most exciting of subjects, it is very important. Now with the advent of internet technologies we are in a world where the rules have changed. This article outlines our arguments for why the adoption of more engaging research tools will help the research industry address these new challenges.

There is no doubt that the transition to internet-based market research has been fraught with challenges. However, it is also the case that ‘the train has left the station’ and only now are questions being asked about the ultimate destination of internet research.

To put it into context, if one examines the evolution of market research, it is apparent that there have been significant improvements in many areas. But, in the age of the internet, despite having the most powerful and ubiquitous communication advances at its disposal, the market research industry has used the web merely to conduct the same research online as it would have done offline.

Given the amount of consumer-generated data already free-flowing (literally) on the web, and the growing number of consumers online, the market research industry’s development seems stunted in comparison. Other industries, such as online financial trading (not in existence 20 years ago), are engaging seriously, and successfully, with this resource. The global conversation is happening, as Locke et al. predicted in The Cluetrain Manifesto in 2000:

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¹ This paper extends arguments first outlined in an article in the May 2008 issue of Admap.
A powerful global conversation has begun. Through the Internet, people are discovering and inventing new ways to share relevant knowledge with blinding speed. As a direct result, markets are getting smarter – and getting smarter faster than most companies.

**Stuck in the 1990s?**

The consumer internet is evolving away from the introductory Web 1.0 stage to the phase of online activity and engagement known as Web 2.0.\(^2\) This new iteration of the internet is marked by a transition away from mere digital paper production to a platform that is visually stimulating, has intuitive interfaces and encourages (even depends on) increased user-generated content. But, despite this, and everything that is now readily available in terms of sophisticated web applications, tools, entertainment and media capability, the market research industry has failed to adequately engage consumers in a meaningful way online. It needs to realise how to gain and retain the attention of the exceedingly cynical, distracted, research-wary and yet highly vocal consumer. According to Massachusetts Institute of Technology Professor Eric Brynjolfsson (2008), ‘information has become a commodity and attention is the scarce resource’. The challenge is that, at any moment, respondents are just one click away from thousands of more interesting websites. Even the best online research efforts are at risk.

Some examples of enabling technologies include sites such as YouTube and Flickr, where the average visit lasts about 30 minutes\(^3\) – as long as the average TV programme. As a result, cyberspace is replete with voluntary data that consumers have linked from site to site. Clearly, consumers need technologies that are more immersive, engaging and facilitating to personal expression than what is on offer on today’s online research menu. The fact that established web retailers (e.g. Amazon, eBay, Dell) and technology start-ups (such as Facebook, MySpace and Wikipedia) are pursuing these technologies is a potential threat to our very existence. As an industry we cry out about low cooperation rates, but actually do little about it.

So far, so bad – it seems that the only significant exploitation of the web is to deliver research faster and cheaper.

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\(^2\) We will not even mention the challenges of Web 3.0 that lie just around the corner.  
\(^3\) www.netratings.com
If the internet’s power is harnessed properly there is little limit to what can be achieved. And the good news is, the relationship between effort and payback is not linear – even the smallest efforts to leverage the web have significant rewards for marketer and respondent alike.

So what is needed is not a revolution in market research, but simply the application of the intuitive technology that consumers already use. We need to ask the question, ‘What makes these “more interesting” websites so successful?’ Take, for example, Amazon.com, which has used the web to revolutionise an everyday experience. Amazon has taken the simple, anonymous act of buying a book and turned it into a powerful, insight-driven consumer interaction. Consumers are willing participants because they are captivated, entertained and engaged by a unique online experience. Not only can you browse titles but you can view covers, read reviews, search inside to view specific pages, and interact with readers of similar taste. Plain and simple, it is fun. And while other retailers are currently failing in this troubled economy, Amazon is wildly successful.

**Using visual techniques to tap into the subconscious**

By not taking full advantage of Web 2.0 capabilities such as intuitive technology, the market research industry is handicapping itself. It continually relies on research techniques that only scratch the surface of what consumers think and feel. What it needs is a fresh approach. The traditional quantitative research process goes something like this: brief with words; collect the data with words and numbers; analyse with words and numbers; debrief with words and numbers. Even the addition of a qualitative question such as, ‘Other than price, why did you buy this product?’ fails to elicit much more than a rationally literal response. As consumers ourselves, we know that brand decisions are mostly irrational, subconscious and non-verbal. So why, as researchers, do we habitually rely on consumer verbalisation methods that excessively use rational, left-brain processing?

Not only does this approach seem clumsy, but it is contrary to findings from many contemporary areas of psychology and neuroscience, which prove that the vast majority of decision making takes place in the subconscious. Author and Harvard Professor Gerald Zaltman (2003) has found that only 5–20% of thought and decision making is conscious, with 80% or more of all human communication being non-verbal. Further studies have found that only 7% of the meaning in any message is contained in verbal language, and that visual metaphors are especially
effective at surfacing hidden knowledge. In the field of psychotherapy, the use of metaphors has been proven to help patients make subconscious experiences progressively more conscious and communicable. Clearly, visuals and images have the ability to ‘activate the silent’ within a respondent.

To illustrate the point that we think of images before words, consider Figure 1. Did the image of the black triangle come first, or the language used to describe it? The brain processes visual information by first translating the stimulus into thoughts and then into words. (This process draws on ideas from neuro-linguistic programming.) Quite frankly, there is a world of insight to be gained from understanding that translation.

These findings are especially relevant to the area of market research as consumers make specific emotional decisions and behaviour choices before (or whenever) they put a single thought into words. Qualitative research has addressed this issue to a degree, but not in a scalable, comparable and globally organised way. Consider the researcher’s challenge, for example, when struggling to understand why a particular brand becomes an impulse purchase at checkout, or what motivates the buyer to purchase a particular brand when standing in the aisle (besides a coupon). For this to happen, the product needs to be a top-of-mind brand. But what makes a brand top of mind? What moves the consumer to make that impulse purchase? If we rely on traditional verbal techniques, the consumer’s answers will be predictable at best and not really actionable. That’s because the manoeuvring that leads to the impulse purchase is occurring at the subconscious level, and traditional word-driven techniques will rarely tap into those emotions. At best, you might get the consumer’s conscious interpreting of his or her own subconscious. Clearly, something else is needed.

![Figure 1](image_url)
Research 2.0: capitalising on Web 2.0 advancements and applying them to the market research experience

If we consider the aforementioned challenges facing the market research industry, we might wonder how best to face them. This is why we use the expression Research 2.0, since our ‘models/tools’ of acceptable research need to be re-examined in the light of today’s Web 2.0 reality. In order to do this, we should focus on the online habits and desires of consumers. With this fresh perspective, we will not only be able to use the internet to obtain better and more digestible information but we may also find potential for re-engineering traditional research techniques.

As an example of this, BuzzBack Market Research has developed the award-winning eCollage tool. Based on a common research technique, BuzzBack’s eCollage transforms traditional collage making into a modern, game-like exercise in self-expression, where consumers use intuitive online functionality and a familiar drag-and-drop feature to reveal their innermost beliefs, characteristics and attitudes. The creativity is still there, but unlike traditional collages, the visually rich and interactive eCollage records image selection, swapping, sequence, placement and more. The underpinning technology captures all the data, as placement of each image on the online canvas is a measurable transaction. These data can then be overlaid with consumers’ other survey data, including follow-up questions about their eCollage.

We have found that image-based stimulation online yields unique and profound open-end responses that get to the core of what makes consumers tick. With all this rich data captured electronically, we can still deploy the heavy-lifting/heavy-duty analytics against the conscious and subconscious responses to unlock deeper insights. Further, by leveraging the reach of the internet, this technique quickly gets at consumer emotion on a quantitative level, and because we can ensure consistency in image use, we have added a bit of ‘science’ to the exploration of emotions. Best of all, because the method is quantitative, we have empirical evidence that it works, as described in the following example.

In an engagement with Lean Cuisine, we wanted to understand how consumers perceive a competitor brand: Healthy Choice. We compared the reactions to a word-based request, ‘Describe how you feel about Healthy Choice frozen dinners and entrées’ versus an eCollage + text request, ‘Create a collage that shows how you feel about Healthy Choice frozen

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4 This expression was coined by Martin Osley at a Centaur Consumer Insight Conference in 2006.

5 BuzzBack was winner of the 2007 MRS/ASC Award for ‘Technology Effectiveness’.
dinner and entrees.’ The text-based word count averaged 18 words, while the eCollage-based word count averaged 40 words. As noted above, in word count there was also a much richer emotional response to the visual stimulation of eCollage. Consumers’ emotional response was expressed by a uniquely story-telling language, packed with metaphors, which provided Lean Cuisine with the keys to unlocking the optimal way of talking to its consumers in their own language.

The information gleaned from this engagement also consisted of short ‘word’ descriptions. In the visual-based approach the common elements of these descriptions were health/wellness, convenience and choice. With the text-based approach the common elements dealt with product features such as taste, nutritional content and ingredients. Quite literally, we found that the eCollage experience elicited much more of an ‘out-of-the-box’ feeling about the product compared to the ‘on-the-box’ feedback we received from the non-collage approach. See Figure 2 for more information.

Subsequent studies have continued to yield similarly enlightening results. One example is a study conducted among psychiatrists and patients with depression. This study aimed to illuminate any differences in perception between the two groups. Using the exact same image set, psychiatrists and patients were asked to create a collage that demonstrated why patients decided to take medication to deal with depression. Figure 3 displays top image choices within the two groups. The eCollage image choices

![Figure 2](image_url)

**Figure 2** Use of eCollage dramatically shifts coded open-end responses about feelings of Healthy Choice away from functional to emotional
clearly depict a gap in perception: patients focused on the problem while psychiatrists focused on the solution.

A parallel cell, identical in all aspects except that it lacked the eCollage component, was also fielded among patients. In this cell, the collage was replaced with a traditional open-ended question: ‘Why did you decide to take medication for your depression and/or anxiety?’ Among the more interesting findings from this cell was how the collage technique affected the nature of the words the patients used. A comparison of the coded open-ends between the cells shows a considerably different mind-set as a result of the respondent experience (see Figure 4).

What the above engagements reveal is that combining Web 2.0 functionality with re-engineered research methods provides rich and different types of information that cannot be elicited through standard techniques. Importantly, we can demonstrate empirically that these methods work. By providing an engaging and interactive experience for respondents, we have found a direct and clear benefit for the marketing professional.
The future

There is now no doubt that the web can bring much more than just speed and cost-effectiveness to the research process. To achieve this, we need to look beyond our current practices, and start building tools and models that reflect the new reality of Research 2.0. If we learn from the places to which consumers, by the million, are voluntarily flocking and contributing, without prompt or financial incentive, we can then selectively and proactively choose what’s coming next. As William Gibson (1999) said, ‘The future is already here – it’s just unevenly distributed.’

References

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About the authors

Martin Oxley is Managing Director of BuzzBack Market Research. Martin has worked in research for 20 years and during this time has worked for two of the biggest global firms: Ipsos and TNS in managing director positions. He has been ‘banging on’ – as a former colleague called it – about online since the early days and is now pleased to see that the real promise of the internet is being fulfilled. He has worked with many brands in a wide variety of sectors and is a regular speaker at research events.

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