

## What's next in online and social media research?

**Ray Poynter**

The Handbook of Online and Social Media Research (Poynter, 2010) was published in August 2010, which means that it is potentially just over a year out of date. Indeed, the truth is even worse, the final draft of the book was delivered to the Wiley, the book's publisher, at the end of February 2010, a year and half ago. In a field as dynamic as online and social media research things move quickly and the objective of this paper is to update the book, highlighting changes that have happened in the last 18 months and indicating what appear to be the key emergent trends.

### **MULTIPLE STRANDS AND ONE BIG TREND**

There are multiple strands of innovation, experimentation, and change happening within the field of online and social media research. For example, social media listening, the gamification of research, and behavioural economics, but behind all of these specific changes there looms one mega trend that promises to re-shape and re-engineer market research. This mega trend can perhaps be best described as Big Data, the integration and utilisation of the electronic wake of information created by citizens, customers, and organisations.

This paper first addresses the strands of change, highlighting those that are happening now and offering some thoughts about the immediate future. The paper will then turn to the subject of Big Data. Looking at what the term Big Data means, how it is challenging traditional assumptions of market research, and how it might link to the other strands covered in the paper.

### **THE STRANDS OF CHANGE**

Any list of factors and changes is bound to be partial and personal, but the list below, and the subsequent sub-sections, reflect some of the most important strands that have either happened in the last eighteen months, increased their salience, or are poised to become more important.

1. Social media listening
2. Text analytics
3. Netnography
4. MROCs
5. Community panels
6. The gamification of research
7. DIY research
8. Neuroscience and biometrics
9. Behavioural Economics
10. Mass and auto ethnography
11. Research Bots
12. Mobile research

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### Social Media Listening

Like many new technologies social media listening was subject to people overestimating its short term impact, but perhaps underestimating its longer term implications. Social media listening, sometimes simply referred to as social media research, is the large scale aggregation and analysis of naturally occurring conversations in social media. Its key claim to legitimacy is that it analyses naturally occurring conversations, rather than dialogues created by researchers. However, this is also its key weakness as it depends on relevant conversations happening.

The key elements of social media listening consist of: gathering the conversations (typically via bots/spiders/crawlers), pre-processing the data to identify genuine comment as opposed to paid for content and promotional content, text analysis (including sentiment analysis), trend analysis, and influence analysis.

Over the last couple of years there has been considerable growth in the number of organisations offering social media listening and the current situation could be described as consisting of four key issues:

1. Necessary but not sufficient
2. Hyperbole
3. Is it research?
4. Ethical challenges

#### Necessary but not sufficient

One way to summarise social media listening is to say that it answers questions you never asked, but it does not routinely answer questions you do ask. This has resulted in a situation where any sensible brand is monitoring what people are saying about it in social media and similarly most agencies are monitoring the buzz about their clients, to make sure that are not missing something useful. However, only a few research users have found that they can replace their traditional research with social media listening, most have found they need to add it to the mix.

#### Hyperbole

Many market researchers and buyers of research have found themselves shocked by some of the outrageous over claims made by a minority of the social media monitoring system vendors. Amongst the things being over claimed are: how much of the social web can actually be reached (for example most of Facebook can't be reached), the degree to which posts can be linked to geography, the accuracy of the sentiment analysis, the simplicity of the systems (some are sold as DIY, a topic covered later in this paper), and the affordability of social media listening (it turns out to be more expensive than expected).

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The item which has had the most coverage in the research trade press (e.g. Golden 2011) has been the accuracy of automated sentiment analysis. Sentiment analysis is the process of taking a collection of posts, for example about a brand or a campaign, and describing them as positive, negative, or neutral. Automated sentiment analysis (at least in some form) is essential to the future of social media listening. There is no point collecting large databases of conversations if they have to be coded manually, it will be too slow and too expensive. Some of the more outlandish claims put the level of accuracy of automated coding at 98%, whereas studies conducted by UK agency Freshminds have put the figure at closer to 30% in some situations (quoted by Golden 2011).

In terms of sentiment analysis there needs to be a clearer understanding of what is needed. Automated coding does not need to be 100% accurate; humans are only about 80% - 85% accurate (by which we really mean consistent with other humans). We can't define accuracies higher than human accuracy, but we can define consistencies higher than 85%. If we want to track whether the positive sentiment for a brand is increasing we need a measure that reflects the movement in the population, we do not need to fully (or accurately) understand each individual. As Canadian researcher Annie Pettit has said, if humans can be 85% accurate and machines can be 70% accurate, then we will often want to use the machines so as to be able to process very large numbers of cases (Pettit 2011).

### Is it research?

Most of the tools used by market researchers were created for market researchers, but this is not the case with many, perhaps most, social media monitoring tools. Social media tools are capable of identifying who has made a comment, allowing organisations to respond. For example, hotel chains using social media monitoring to evaluate customer satisfaction may also choose to follow up negative comments to see if they can resolve problems, or to follow up brand mentions and queries to see if they can stimulate interest and brand advocacy. These are sensible actions from the brand's point of view, however, they are not market research. Indeed they are not even necessarily SUGGING (selling under the guise of research) since the person contacted did not know they were being researched in the first place (which links to the next point on ethics).

One of the challenges for market research is that many of the organisations offering social media monitoring do not describe themselves as market researchers. Similarly, they tend not to belong to market research bodies and tend not to have signed up to market research codes of conduct. Within many of the companies buying social media listening there is no clear home for it. For example, should it be bought/owned by insight, by marketing, by finance, by NPD or by whom?

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### Ethical challenges

Traditional market research has rested on the twin pillars of informed consent and respondent anonymity. Both of these are challenged by the adoption of social media monitoring. When automated processes access hundreds of thousands of conversations in social media, are we sure that the 'subjects' have consented and if they did consent, were they informed? It is probably fair to assume that somebody who writes a blog or posts a comment on a news site is expecting their comment to be read and listened to. But, does everybody tweeting really think about who can read, mine, and scrape their comments. Do people posting comments on Starbuck's Facebook page really think about, and implicitly consent to, third-parties (not friends, not Starbuck's) harvesting and using those posts?

In most areas of conventional research anonymity is relatively easy to ensure, but anonymity is much harder to preserve with social media listening. Even quoting a literal post can allow a third-party (for example a client) to use a search engine, find the individual post, and then use tools such as PeekYou to find out an immense amount about the person making the post.

The most commonly quoted example of a case that highlights the potential ethical problems (and the bad publicity that can flow from breaches) is the Nielsen and PatientsLikeMe case. PatientsLikeMe is a closed community that people join to discuss health related problems. The people running the site noticed that somebody was 'scraping' information (i.e. logging in using software to replicate a person and using it to cut and paste large amounts of personal information). They investigated further and discovered that it was being done by Nielsen, who were scraping the site to sell information to a client. The story was broken by the Wall Street Journal (Angwin & Stecklow 2010) creating bad publicity for Nielsen. Nielsen quickly apologised and promised to never do this sort of thing again – but the mud seems to be sticking.

### Text Analytics

Text analytics is both a specific element of social media listening and a strand in its own right. As part of the growing disillusionment with surveys more and more researchers are turning their attention to open-ended comments from customers and service users. For example, many quant studies now seemed to be accompanied by some sort of word cloud, a simple form of text analysis but one that seems to appeal to many audiences.

The market for software that processes text and delivers meaning is much, much wider than just market research, and the problem is one that interests academics for their own reasons too, so it is likely that the improvements we have seen over the last couple of years will accelerate and start to open new possibilities. At the start of the 20<sup>th</sup> Century the psychometricians of the day debated whether to use open or closed questions. They settled on closed questions because they could

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more readily and consistently be processed. Researchers may be about to re-visit that issue. Perhaps the customer satisfaction survey of the near future will have just two questions, some sort of satisfaction or recommendation score and an open question asking "And why did you say that?"

### Netnography

A few people use the term netnography interchangeably with social media listening, but I find it more useful to use the somewhat narrower definition provided by Robert Kozinets in his book *Netnography* (Kozinets 2010). Kozinets defines netnography as a branch of ethnography, where the researcher immerses his or herself in the lives of the people being studied, albeit through the medium the web. Kozinets' view is that most projects should be based on a participant/observer model, not on simply passively collection information. Kozinets urges netnographers to engage in the communities they are researching, allowing the researcher to validate their assumptions through techniques such as member checking.

Interest in and the utilisation of netnography is growing, particularly as a precursor to large quantitative studies. However, it is likely that netnography is going to remain a niche approach as it requires large amounts of time from skilled researchers. The answers netnography provides tend to be neither cheap nor quick, but they are sometimes the right/best answers.

### MROCs

The term MROC, market research online community, was coined by Forrester in 2008. Although the term MROC is somewhat inelegant, the term has stuck. Over the last eighteen months MROCs have become mainstream, with many clients using them for both ongoing and short-term projects (although there are people who dispute whether a short-term community can really be a 'community').

One illustration of the mainstreaming of MROC research was the purchase of MROC pioneer Communispace by Omnicom in early 2011. Another illustration is the prevalence of MROC related papers at conferences. Four years ago the papers about MROCs were mostly concept papers, looking at the potential of the idea, by late 2010 the balance had shifted to being almost entirely cases studies and multi-project reviews.

The general consensus in the market research industry is that MROCs are essentially a qualitative technique. Short term communities tend to be used as a replacement methodology for other qualitative methodologies. Longer term MROCs tend to be seen as a more general research resource, seeking to co-create solutions for the brand. This qualitative positioning is made more relevant by the growth of the community panel model (see next topic), which provide a predominantly quantitative solution.

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MROCs are currently undergoing a period of both consolidation (as a growing range of clients become comfortable with using them) and change, as new software and options become available. One of the challenges that still remains, for most research organisations, is to work out how to make MROCs scalable as an offering. MROCs tend to be researcher intensive, resulting in them consuming resources and making them harder to sustain financially.

### Community Panels

Community panels are the quantitative yang to the MROCs qualitative yin (MROCS typically have 50 to 500 members, community panels typically have 5000 to 50,000 members). Communities are a development of the traditional in-house panel, but enhanced with a level of engagement at both the survey and the overall communication level. Although community panels can offer some specific benefits (such as speed, consistency, and longitudinal analysis) the main driver in their adoption has been their ability to drive down the cost of research.

Community panels have been facilitated by a focus on engagement, a growing acceptance of re-using respondents (as in the case of the access panels), and the provision of integrated software from the likes of Vision Critical, Vovici, and GlobalPark.

For organisations conducting a reasonably large amount of market research, community panels hold out the carrot of reducing market research budgets in absolute terms, as well as making research faster and (in terms of longitudinal analysis, engagement, and targeting) better. For many research providers the shift to community panels is an uncomfortable process as it often means that clients insist they place their fieldwork with the client's community panel, which means they have to be much more transparent about how much of their price is fieldwork and how much is executive time.

Community panels are likely to become a major player in quantitative research (although they can also be used for qualitative research, including the creation of short-term MROCS). Likely enhancements are the linking of other data to the community database, for example social media and transactional data.

### The Gamification of Research

The gamification of research refers to several mini-strands that can be grouped under the same label. Amongst these strands are:

1. Gaming approaches to make conventional surveys more engaging, for example the initiatives being suggested by Jon Puleston from GMI.

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2. As a motivational device, for example the increasingly common process of incentivising the 'post of the week' within online communities.
3. Employing a gaming mechanism, without presenting research as a game, for example the sorts of predictive markets used by John Kearon and Brainjuicer.
4. Data generated as a side-effect of some gaming activity, for example the sorts of information generated via Foursquare.
5. Games used directly as market research devices, for example those being developed by Betty Adamou at Research Through Gaming in the UK.

Gaming approaches are likely to have some impact on market research, but in most cases this will be via niches. For example, where a brand wants to specifically target 18-21 year old users of a product, or where respondents are being expected to take part in a long-term task that has the risk of being boring. However, in most cases gaming will be an extra cost and design factor, which is likely to mean it is only used when it needs to be used, since it would otherwise reflect higher costs and greater delays.

### DIY Research

Survey Monkey has become, at least according to its own press releases, the largest global, survey platform, in terms of numbers of surveys. Survey Monkey is an example of a trend towards DIY solutions. A growing number of organisations are dealing with some of their research needs themselves. In many cases this is a case of research that would never have been considered before DIY tools were available, but in some cases it can reflect the shift of research away from agencies and to internal staff (some of whom are trained, some of whom are not).

Other major changes in the area of DIY research include: initiatives from mainstream panel companies such as Toluna, social media listening services offered directly to end users, community panels sold as 'self-serve' to end clients, and CRM / 'Voice of the Consumer' systems which increasingly prompt non-researchers to offer research related activities, such as surveys.

The likely impact of DIY research is still hard to judge, but several possibilities present themselves:

1. DIY research could continue to grow, clients might realise the need to improve the quality of what they do, leading to a shift of personnel from agencies to clients.
2. DIY research could continue to grow, but clients could be content to do without the skills required of 'real' market researchers, leading to simpler studies or more errors.
3. The demand for DIY could plateau and then dip as clients realise they are taking on more work than most of them can handle and as problems start to occur.

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### Neuroscience and Biometrics

After a couple of false starts, neuroscience and various associated techniques, such as monitoring faces, speed of response, and traditional biometrics seem to be finding a niche, particularly in the evaluation of advertising and campaigns.

Most of the neuroscience and biometrics approaches are neither online nor social as they require at the very least the detailed monitoring of the respondents, and in the case of full-blown neuroscience the insertion of the respondent into an fMRI scanner. However, one exception relates to the techniques being developed on priming respondents and evaluating implied associations through the speed of responses,

Two significant pieces of news in the area of neuroscience and market research are probably: a) the ARF neurostandards project and b) the purchase of NeuroFocus by Nielsen (which illustrates that neuroscience is coming in from the fringe).

### Behavioural Economics

Daniel Ariely's *Predictably Irrational* (2008) heralded the arrival of Behavioural Economics in the non-specialist world. The ascent of behavioural economics was the death knell for many traditional aspects of classical economics and the model of the rational consumer, i.e. a consumer who sought objectively to match benefits against price and who is sometimes termed an 'econ'.

As Mark Earls reports in his book *Herd* (2007), researchers are discovering that people are unreliable witnesses to their own motivations. This view is very significant for market researchers as it goes to the core of many types of traditional market research, where respondents have been asked to explain, via surveys and focus group discussions, why they did things and to answer questions about their attitudes and motivations.

The rise of interest in behavioural economics has shifted the attention from questioning to observational techniques (from focus groups to ethnography, and from surveys to social media monitoring). It is too early to be clear about how the rise of behavioural economics will fully impact market research, but it is likely to promote the gamification of research, neuroscience related techniques, choice modelling, and mass ethnography (see next topic).

### Mass and Auto Ethnography

Mass and auto ethnography refer to attempts to make anthropology and ethnography more scalable by enlisting citizens/customers/users to capture aspects their own lives and the lives of people around them. Another term for this sort of research is WE-research, a term coined by John Kearon

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and Mark Earls in their paper to the ESOMAR Congress 2009). The concept of mass and auto ethnography has a long history, for example the Mass Observation project that ran in the UK from 1930s to the 1960s.

Two aspects of mass and auto ethnography that are quickly establishing themselves in the toolkits of market researchers are the sort of smartphone enabled research made possible by platforms such as those from Revelation in the US and EverydayLives from Belgium, and the use of community members to explore their own lives and to use the community as a vehicle for reporting.

The smartphone auto ethnography platforms allow the researcher to access the humdrum ordinary lives of the consumer, something the ethnographers often refer to as the quotidian. These elements can be indispensable to understanding how a service or product fits into a customer's life. These details are often too insignificant to the consumer to be recalled or accessed via surveys or focus groups.

Communities have found that tasking their members to use their webcams, flip cameras, and smartphones to capture stories is a great way to enrich the information generated by their communities.

Whilst the mass and auto ethnography approaches are clearly going to grow, their transition into mainstream is likely to be impeded by the difficulties in processing the feedback from these approaches which tends to be predominantly images and video – which are time consuming to process.

### Research Bots

Research bots are one of the newer and truly original innovations in market research to have emerged from social media. At present research bots are limited in their role, but that is likely to change as tools become available and as our ability to imagine new possibilities increases.

One example of a bot is the sort of tool that is used to crawl across the internet to find and gather the conversations that social media monitoring is looking for. These bots are essentially very similar to the sorts of bots that Google uses to map and explore the web.

A second type of research bot is the sort that underpins Brainjuicer's digividuals. These bots are created personas in social media, which once created take on a life of their own (so to speak) and develop friends and interests. The research bots helps develop a picture of what that archetype might do and the sorts of friends they might have.

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### Mobile Research

Mobile research has been the next big thing for the last 15 years, but it may finally be breaking into the mainstream, albeit still as a minority player.

A few people still think mobile is going to be the 'next big thing', pointing to the macro picture, e.g. 6.9 billion on the planet, 5.3 billion phones, and the percentage of people who mostly access the internet via the mobile. However, most people seem to realise that 30 minute customer satisfaction and brand tracking surveys are not going to transfer to mobile, which will leave mobile as a niche player if and until clients change their requirements.

However, the niches are growing and becoming ever more interesting, including the following:

1. A small but growing number of respondents are already using their mobiles to do conventional studies, something researchers should be monitoring and where possible facilitating.
2. Some projects will justify the cost and hassle of being hybrid, offering the respondent the chance to complete them in a number of ways, including via mobile (perhaps in chunks) or via CATI or IRV (interactive voice response).
3. Using mobiles to access the moment, utilising short, targeted surveys, triggered by some event or proximity to a specific location.
4. Smartphone enabled community activities.
5. Smartphone enabled mass and auto ethnography.

### BIG DATA

All of the strands above are interesting and will change market research as we know it today. These changes will make some businesses and break others. However, all twelve of these changes are probably tiny by comparison to the arrival of Big Data. The latest information from the ESOMAR Global Market Research report 2010 shows that about 50% of the revenue that is currently nominally called market research comes from activities that do not relate to asking respondents questions (i.e. they do not relate to surveys, focus groups and the like). This 50% relates to store audits, people meters, processing loyalty card data, web analytics and other data related services. This 50% is the thin edge of the wedge for the Big Data transformation that is about to wash over marketing, market research, Business Information, CRM, Governments, and citizens.

The term Big Data refers to the integration and utilisation of the burgeoning plethora of data being generated by companies, governments, social media and people themselves. Two views of big data are beginning to emerge from market research perspective, although there is a considerable amount of overlap between these two views. The first is a brand-centric view, where all of the data

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held by a brand, e.g. the CRM data, loyalty card data, market research data, and data sourced from social media are integrated and utilised. The second view is a third-party data warehouse model. In this second model, companies, for example a panel company, might access a wide range of information about people and utilise that for multiple brands and clients. One example of this second view is Kantar's Xaxis database which has the profiles of over 600 million people to help target ads.

In both the brand-centric and warehouse model of Big Data, explicit questions (for example surveys and focus groups) will play a smaller and smaller role, as the databases are able to provide more information about what people do, based on observation as opposed to recall. The threat to market research is that people will feel that having enough data will remove the need for market research altogether. The opportunity is that market researchers can focus on putting the "Why?" into the picture, and thereby make the "What?" that Big Data can offer more valuable.

The move from traditional market research to Big Data is likely to be a bumpy and not altogether pleasant one for many market researchers. It is likely to require a fundamental change in codes of conduct, moving away from market researcher's creating codes to models based on informed consent. It will also require market researchers to understand the power of Big Data and to become comfortable with the tools and techniques of Big Data.

## TRYING TO FUTURE PROOF YOUR OPTIONS

Research is changing. Most of the old skills are still going to be necessary, but they won't be enough. Five steps that today's researchers can take to help future proof their options are:

1. Embrace Social Media, both personally, but also in the sense of social media monitoring.
2. Utilise the niches where mobile makes sense.
3. Start to utilise verbatims via text analytics procedures, not just word clouds, but really getting to grips with gaining insight from text.
4. Move out of the ivory tower of research at a distance and become immersed in other people's lives, improve observation skills, and learn the basis of assessing the trustworthiness of findings not based on large scale, representative quant surveys.
5. But, most importantly, start to be comfortable with Big Data. Investigate ways of using Big Data to input to your research, look at how market research can add the why to Big Data's what.

The final thought is based on an observation from the futurist Ray Kurzweil, things are not just changing, the rate of change is accelerating. The process of adding new approaches to the research toolkit needs to be a core skill, not just something we do from time-to-time.

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