



SURVEY TECHNIQUES IN VIRTUAL ENVIRONMENTS:
INTERVIEW SOFAS AND VIRTUAL FACE-TO-FACE
INTERVIEWS

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INTRODUCTION: VIRTUAL WORLDS AND SECOND LIFE

What is a virtual world?

Over the last two years, virtual worlds have started to receive significant attention, with Second Life (SL) currently being the most prominent example of an online 3D virtual world. Online virtual worlds – computer-based three-dimensional simulated environments – provide users with the means to inhabit this world using their *avatars* (the 3D representation of a user), and let avatars interact with each other via chat, instant messaging and voice technologies.

While there are a number of other established and emerging online virtual worlds, none of them are at this time as technically open and flexible as Second Life. It is this openness that enables the kind of integrated survey solutions in virtual worlds which we will be describing in this paper. Although many principles and concepts will equally apply to other immersive virtual environments, this paper will concentrate on Second Life in particular.

Second Life: the hype and the reality

After a lot of media hype in late 2006 and early 2007, increased skepticism has been heard more recently about some of the more exalted claims around Second Life. A number of companies have jumped into this environment with unreal expectations, and are now choosing to scale back or even completely close their operations in Second Life. SL doesn't have the broad appeal of – say – television yet, and probably won't have for some time to come, but this doesn't mean that we as market researchers shouldn't start looking at the potential and the new opportunities this type of environment can present us with. After all, some of the negative comments you tend to hear about Second Life (*high barrier of entry / too complicated for people, too much sex, wouldn't trust it with my financial information, there's nothing to do there*) are very similar to some of the criticisms that were being leveled at the Web in the early 90s. And of course today, few people would doubt the importance of the Web to pretty much any business sector, including market research.

Although now the media hype around it has somewhat subsided, Second Life is continuing to grow steadily, with its population having topped 11 million at the end of 2007¹. In this paper, we're showing that despite its still relatively cutting-edge nature, Second Life can be both an interesting and effective environment for market research. We'll show examples of how we are able to interact with consumers to gather real, valid research findings even today, and describe the opportunities Second Life provides as a test bed for experimentation to achieve a greater understanding of the possibilities, opportunities and limitations of virtual world environments.

CONTENTS

After briefly looking at existing market research activities in Second Life, and seeing how certain market research techniques can translate to SL, we'll be discussing a concrete example of immersive survey technologies in the shape of the *interview Sofas* at the Second Life Interview Corner (SLIC), and how the data collected from these sofas has enabled us to define 10 distinct *Online Personas*.

We'll then present these 10 *Online Personas* in some detail, and consider what they mean for brands wondering whether they should invest in building a presence in Second Life today.

Finally, we'll be describing a couple of other examples of embedded, immersive survey technologies in the shape of automated so-called *bots*, before closing with a tentative look at what the future may hold for market research in relation to virtual environments.

OVERVIEW: MARKET RESEARCH AND SURVEY ACTIVITIES IN SECOND LIFE

Different approaches

Looking around Second Life, there are a number of different approaches to marketing and market research in this virtual environment. Some market research firms use Second Life to recruit panelists and build research panels for both qualitative and quantitative research. The quantitative side is usually conducted through web surveys, while focus groups for qualitative research can take place inside Second Life, often in specially designed areas. These agencies also provide forms of concept testing, making use of competitions inside Second Life to encourage panel members to create their own content. This could take the form of 3D content such as buildings and other objects, or creating so-called *machinima* – videos filmed inside Second Life – making use of the 3D animation capabilities of the virtual world.

Product and concept testing seems like a natural fit with Second Life. SL users are by definition always in interactive mode, sitting on furniture, trying on clothes, or even wandering up and down the aisles of a virtual store. It doesn't take a huge leap of the imagination to move this natural interactivity onto more formal co-creation, and picture a scenario where avatars help design and build product prototypes as part of the market research process. Philips Design's co-creation experience in Second Life² is one such example, helping the company understand people's values and motivations in virtual immersive environments. This understanding is then used in the company's service offerings in the areas of people engagement and brand immersion. Meanwhile, Coca-Cola hosted a premiere for their *Happiness Factory* advert inside SL³, and then extended the life of the campaign by running the *Virtual Thirst* competition⁴, inviting SL residents to design and prototype a virtual vending machine with limitless possibilities.

Many virtual research techniques translate easily into Second Life. Virtual shopping malls and stores could provide a shopping experience that combines elements of virtual shopping and shelf layout testing with *real* in-world purchasing and product usage observation. Products being sold and tested in virtual stores could contain real-life products (there already are a number of Amazon-powered shops in Second Life) or products for use inside the virtual world, such as clothes for people's avatars. And unlike the real world, Second Life can provide marketers with the means to measure not only what people say they will do, but crucially also what they actually end up doing.

Similar to web analytics and traffic measurement, there are now a number of companies offering metrics solutions in Second Life. These products typically deploy sensors on a company's virtual land to record and analyze the number of visitors, as well as their movement on the land. Adding a survey component to a metrics solution can enrich that data, adding attitudinal and opinion data to traffic and behavioral data. This is similar to the way feedback gathered through surveys enriches usage metrics and click-stream data on the Web.

Survey software getting a Second Life

Second Life's open technical architecture makes it possible to develop *bridges* that enable web survey software to reach directly into the virtual world, and not rely on users having to open their web browser, thereby breaking the immersive nature of the Second Life experience.

These programs make use of the capability to add interactivity and animation to objects created inside Second Life, which includes the ability to connect to the *outside* Internet. In practice, this means that a scripted object that exists inside Second Life can interact both with objects and people/avatars in the virtual world, and at the same time communicate with external programs on the Internet at large.

Let's look at some concrete examples of this technology, and how it can help brands better understand their customers' profile and expectations.

SLIC: INTERVIEW SOFAS AT THE "SECOND LIFE INTERVIEW CORNER"

What is SLIC?

SLIC, the *Second Life Interview Corner*, jointly created by global market intelligence solutions provider GMI (Global Market Insight, Inc.) and marketing research firm DervalResearch, is one of the first examples of these types of interactive survey objects in action. SLIC features *interview sofas* for different hot topics in SL as well as in real life. When a respondent selects a topic and sits on the related sofa, the interview starts. The sofa asks open or multiple-choice questions via the SL chat function, and respondents' answers are recorded. SLIC is fully automated and integrated into the SL user interface.

By being available 24x7x365, SLIC offers a good geographic representativity of respondents at a competitive cost. Respondents can be recruited in real life as well as in Second Life via *word of virtual mouth* and groups. If desired, respondents can be automatically rewarded with Linden dollars (Second Life's in-world currency) or a gift at the end of the interview, according to their gender or preferences. This makes for an extremely cost-efficient process, taking advantage of existing Second Life infrastructure rather than having to involve manual processes or payment fulfilment by a third-party. Residents can then use these well-earned Linden dollars inside Second Life to purchase items and services, or exchange them for U.S. dollars at special Linden dollar exchange outlets.



Figure 1: The Second Life Interview Corner (SLIC)

SLIC reveals 10 *Online Personas*

"Web communities are a new mass media, targeted by affinity," highlights Prof. Diana Derval, President of DervalResearch⁵. "With 26 million Facebook⁶ visitors, 12 million Second Life⁷ residents and over 10 million LinkedIn⁸ users, web communities could represent an extraordinary opportunity for brands. If only they could get more insight on these Online Personas."

Using the survey sofas located at the *Second Life Interview Corner* for virtual face-to-face interviews, DervalResearch managed to identify and describe *Online Personas*. The top 10 *Online Personas* are revealed in this paper. Read more and discover the profile, behavior, motivations and expectations of Bob, 36, System Administrator into BMWs; Lynette, 32, *desperate housewife* drinking Coke; Ian, 27, Software Developer and his furry avatar; or Gary, 32, Business Man spending 1,000 Linden dollars a month in Second Life.

The benefits of *Personas*

Personas are fictional characters based on real-life data and research, conveniently shared by all departments (design, communications, sales) within a company. Leading brands use this framework for a consistent and targeted approach of their customers based on their profile and expectations. Philips Design, for instance, has built a *Personas* database, including users' education, insights and income⁹.

Through this online marketing research, the objective for DervalResearch is to help firms answer the critical question: "How can I use web communities to better reach my target customers?"

Second Life: the perfect moment

DervalResearch has demonstrated that consumers were at least twice as receptive to communications while they were waiting¹⁰. This is because consumers consider interactions in that specific context as entertaining. A TV commercial, for instance, will be remembered by 17% of consumers. The same ad will be remembered by 27% of consumers when they see it in the doctor's waiting room.

Marketers can also grab the opportunity offered by *wait marketing* online by getting feedback on new products and ideas, while their target customers are available, roaming in their web communities. In that context, answers are trustworthier as the respondent doesn't rush to share their views. SLIC was co-created by DervalResearch and GMI to enable brands to hold automated one-to-one chats with online users at that perfect moment.

SLIC: THE POWER OF AUTOMATED FACE-TO-FACE INTERVIEWS

To identify, understand and document *Online Personas*, DervalResearch conducted interviews with predominantly open-text questions. Respondents felt free to speak their mind and shared often unexpected, but always valuable information. For instance, DervalResearch researchers were able to identify the *Online Persona* Martin, disabled, thanks to the open question: "What is your activity or profession in real life?"

Three *hot topics* were proposed for the interview: co-development, time use and customization.

Here is an example of questions on co-development:

1. *Do you think brands are taking the opinion of their customers into account when developing products? Can you give two examples in SL and in real life (RL)?*
2. *Which three products or brands are you particularly interested in in SL and in RL? Can you tell us why?*
3. *In which two fields of the product development process would you have the greatest input?*
 - a. *Initial concept/design*
 - b. *Prototype validation*
 - c. *Features testing*
 - d. *Packaging*
 - e. *Marketing*

Do you have a specific education/experience/interest in these fields?

4. *What would be the best way for you to share your ideas, for example a monthly meeting or an on-demand feedback form?*
5. *Are you willing to share your ideas*
 - a. *For free?*
 - b. *For a reward?**If b.) What kind of reward would you expect?*
6. *How long have you been in SL?*
7. *Do you visit SL*
 - a. *For fun?*
 - b. *For business?*
 - c. *For both fun and business?*
8. *What is your activity or profession in RL?*
9. *Any other point you would like to add on the topic or about yourself?*
10. *What did you think of this interview?*



Figure 2: The SLIC interview sofa

DervalResearch's team of researchers analyzed 171 interviews conducted in Second Life from August 2007 to January 2008, representing over 2,000 open answers. They made connections between the different answers in order to:

- Check consistency between all the answers of a same respondent
- Investigate behavioral and motivational patterns
- Identify segmentation criteria

DervalResearch was able to identify and document *Online Personas*. The Top 10 *Online Personas* are revealed in this paper.

10 ONLINE PERSONAS REVEALED

Shared knowledge on *Online Personas* is quite limited. Second Life disclosed for instance that their top 10 percent users spend on average 84 hours a week in the virtual world. We also know the average age of residents: LinkedIn is 39, MySpace is between 18 to 35, Second Life is 32 and Facebook is 21 to 22¹¹.

DervalResearch detected major patterns in the users of web communities, and was able to segment them into *Online Personas* based on their profile, behaviour, motivations, expectations and also the connection between their different answers. Here are the Top 10 *Online Personas* based on DervalResearch analysis:

1. Marc, student
2. Gary, e-business consultant
3. Chris, graphic designer
4. Bob, system administrator
5. Ian, software developer
6. Kim, waitress
7. Paul, professor and researcher
8. Shawn, social worker
9. Lynette, stay-at-home mum
10. Martin, disabled

1. Gary: "Cleaning the Environment"

Gary is a business man who likes to consider himself as an "avid consumer, an opinion leader."

Gary is very active in Second Life: "I like this game. I am diligent and hard working! And I like to make money!" He is buying "clothing to wear, money to spend and land to live on!"

Gary		"Cleaning the Environment"
Real Life	Job	Business Man (eBusiness Consultant)
	Gender	Man
	Age	32
	Drivers	Being an opinion leader
	Activities	Reading , playing video games, watching TV , riding, surfing the web , working
	Interests	Clothing, housing, economy, computers, cars, cable, Internet
	Favorite Brands	Sanyo, Second Life, Disney, Mercedes, Peugeot
Second Life	Connection	At night or during daytime, from home, for less than one month
	Drivers	Fun and business
	Budget	500 to 1,000 Linden\$ per month to customize environment
	Interests	Clothing, housing, transportation, furniture, land, vegetation
	Activities	20 hours a week : cleaning the environment, shopping (clothes , hair, shoes), events
	Favorite Brands	IBM, Biogen, Merck, BMV, Peugeot
	Suggestions	Integrated emailing to reduce waiting
	Mood	Excited

Source: Analysis performed by DervalResearch based on 171 chat interviews with Second Life visitors, recorded by GMI from August 2007 to January 2008.

Figure 3: Online Persona # 1 – Gary

2. Marc: "Meeting Friends"

Marc is a student at University. He likes brands such as Gant, Boss and Ralph Lauren for their good quality, and spends his time watching TV, reading and chatting.

In Second Life, he meets friends, but doesn't really have a budget to spend.

Marc		"Meeting Friends"
Real Life	Job	Student
	Gender	Man
	Age	21
	Drivers	Communities
	Activities	TV, reading , SL news, shopping, chatting, letting out the dog, masturbating, hanging out with friends, cooking, doing homework
	Interests	Clothes, healthcare
	Favorite Brands	iPod, Gant, Boss, Ralph Lauren, Coke, Pepsi, Nike, Starbucks, McDonalds
Second Life	Connection	In the afternoon and at night, from home, for 2 months
	Drivers	Friends
	Budget	None
	Interests	Clothes, jewelry, furnitures
	Activities	Events, meeting friends, clothing shops, malls, dance clubs , chess club, casino, sex
	Favorite Brands	Nike , Adidas, Toyota
	Suggestions	
	Mood	Cynical

Source: Analysis performed by DervalResearch based on 171 chat interviews with Second Life visitors, recorded by GMI from August 2007 to January 2008.

Figure 4: Online Persona # 2 – Marc

3. Chris: "A Good Look and a Nice House"

Chris, a graphic designer, spends one to four hours a week decorating his house and € 50 a month in clothing. He buys books and DVDs on Amazon as it is "easy to use and you find almost every book and film," clothing at H&M, music on iTunes, and shopping at the supermarket (Globus in Germany or Walmart in the U.S.)

Chris is very enthusiastic about Second Life: "I love this place and really love the fact I can express my creative side here!! What a fantastic invention this gaming is!!!"

He estimates brands such as Olympus are really listening to their customers: "I am a Real Life photographer too!" and is admiring: "Nyt'N'Day clothes are very well done." He builds his own hats, clothes and fun things, and spends two to five hours a week customizing his villa with pillows, poseballs, food and drinks and nice surroundings "because I want to give my friends a place where they can relax."

Chris		"Looking Good and Having a Nice House"
Real Life	Job	Graphic Designer
	Gender	Man
	Age	27
	Drivers	Aesthetic
	Activities	Cleaning , retouching pictures, playing solitaire, planting, decorating house, clothing, house furnishing, music, video games, bars
	Interests	Buying a house, design, fun things, technology, electronics, books, games, jobs, cameras, computers, mobile phones
	Favorite Brands	Amazon, Google, Villeroy & Bosch, Next, H&M, iTunes
Second Life	Connection	Night and day, from home, for 6 months
	Drivers	Looking good/nice
	Budget	Up to 500 Linden\$
	Interests	Hats, clothes , jewelry, hair , shoes, fun things, money chips, hippy pay (free Linden\$), villa, house furnishing, cameras, land
	Activities	Events, malls, clothing shops , house furnishing and surroundings, hats, clothes, fun things.
	Favorite Brands	Apfeland, Gurl, Nyt'N'Day, Olympus.
	Suggestions	Using voice
	Mood	Enthusiastic

Source: Analysis performed by DervalResearch based on 171 chat interviews with Second Life visitors, recorded by GMI from August 2007 to January 2008.

Figure 5: Online Persona # 3 – Chris

4. Bob: "Exploring and Dancing"

Bob is a system administrator, who loves cars and technology. He wears trendy clothes: "I'm changing my clothes often" and "different clothes for different occasions." Products such as K-Swiss footwear, SonyEricsson mobile and IBM-Lenovo laptop help him improve his "professional life."

In Second Life too, he can relate to brands with a “proven record for quality” such as Nike, Rayban and BMW: “I read about all the new prototypes, especially BMW.” In fact, he is very interested in new product development: “I like to beta-test all products. I have beta-tested products from Microsoft and have provided feedback”. He selects his clothes carefully “to be different without standing out in the crowd too much,” and enjoys dancing and playing poker.

Bob		"Exploring and Dancing"
Real Life	Job	Technician (System Administrator)
	Gender	Man
	Age	36
	Drivers	Being slightly different
	Activities	Music, movies, books, forums
	Interests	Cars, IT, trendy sportswear , clubbing, watches and sunglasses, finance
	Favorite Brands	Nike, Rayban, BMW, Chevrolet, Under Armour, K-Swiss, SonyEricsson, IBM-Lenovo, Microsoft, Unilever, GE, Taylor
Second Life	Connection	During day time, from home, for 2 months
	Drivers	Fun
	Budget	up to 100 Linden\$ per month
	Interests	Clothes , watches and sunglasses, Cars, IT
	Activities	Dance clubs , malls, clothing shops, poker games, events, sex
	Favorite Brands	Xcite, Linden Labs, Nike, Rayban, BMW, RealisticSkins
	Suggestions	News or financial market news feed, voice
	Mood	Open

Source: Analysis performed by DervalResearch based on 171 chat interviews with Second Life visitors, recorded by GMI from August 2007 to January 2008.

Figure 6: Online Persona # 4 – Bob

5. Kim: “Discovering New Places and Making Friends”

Kim is a young employee, a waitress in a trendy bar or an employee in a supermarket. She enjoys spending her spare day time discovering new places and making friends in Second Life.

Kim		"Discovering New Places and Making Friends"
Real Life	Job	Employee , waitress in a trendy bar
	Gender	Woman
	Age	29
	Drivers	Learning
	Activities	Reading, SL forums , playing games on the Internet, blogging, chatting
	Interests	IT, books, movies, music
	Favorite Brands	Doesn't really know
Second Life	Connection	During daytime, from home, from 6 months to one year
	Drivers	Fun
	Budget	Up to 100 Linden\$ per month
	Interests	Music. Visiting places, Clothes
	Activities	Events, malls , music, camping, partying, photo sessions
	Favorite Brands	Unive Insurance (NL)
	Suggestions	
	Mood	Partying

Source: Analysis performed by DervalResearch based on 171 chat interviews with Second Life visitors, recorded by GMI from August 2007 to January 2008.

Figure 7: Online Persona # 5 – Kim

6. Ian: "Having Fun and Looking Good"

Ian is a happy software developer: "My life is comfortable, and I can do the things that I want to do."

In Second Life, he likes to change the appearance of his avatar. "By the way, today I'm furry!"

Ian		"Having Fun and Looking Good"
Real Life	Job	Software developer
	Gender	Man
	Age	27
	Drivers	Fun, Curiosity
	Activities	Swimming, reading , cinema, chatting
	Interests	laptops , mobile phones, wireless, IT, books, cinema, cars, sports
	Favorite Brands	Coke, Microsoft, Philips , Douwe Egberts, Facebook
Second Life	Connection	At night from home, for 8 months
	Drivers	Having fun, looking good
	Budget	up to 100 Linden\$
	Interests	Events , clothing scripts , news , hair, clothes, skins, make up and skin care products
	Activities	camping , "I like to pumper up and do makeovers"
	Favorite Brands	IBM , L'Oreal, Philips , Nike, Sony
	Suggestions	Store inventory elsewhere, inventory manipulator with windows explorer UI
Mood	Positive	

Source: Analysis performed by DervalResearch based on 171 chat interviews with Second Life visitors, recorded by GMI from August 2007 to January 2008.

Figure 8: Online Persona # 6 – Ian

7. Paul: "Just Looking, not Buying"

Paul is a professor who is spending most of his time decorating his house. He is interested in solar energy and environmental products. He admires brands such as Rolex and BMW for their technology, but admits "I don't spend much money on technology."

Paul has also strong opinions on Second Life: "I don't want to own money in Second Life. I'm not interested in spending real money in a virtual world." His objective there is to conduct some research.

Paul		" Just Looking, not Buying"
Real Life	Job	Professor , researcher and geek
	Gender	Man
	Age	42
	Drivers	Improving processes
	Activities	Decorating home, cinema, friends, email , facebook, reading
	Interests	Technology
	Favorite Brands	Aveda, Demeter, energy solar products, environmental friendly products to insulate house, BMW, Rolex
Second Life	Connection	During daytime and after dinner, from home and at work , for three months
	Drivers	Research
	Budget	None
	Interests	Clothes, jewelry
	Activities	Events
	Favorite Brands	Sony
	Suggestions	More nice places and less discos and shops
	Mood	Very critical

Source: Analysis performed by DervalResearch based on 171 chat interviews with Second Life visitors, recorded by GMI from August 2007 to January 2008.

Figure 9: Online Persona # 7 – Paul

8. Lynette: "Relaxing and Shopping"

Lynette is a stay-at-home mum willing to make her life more enjoyable. She appreciates Apple iPod as it "makes waiting time more enjoyable," Tide because it is "hypoallergenic for children" and Coke and Mr. Clean as she thinks these brands are "awesome."

In Second Life too, Lynette notices that "when Coke make a bad product, they remove it." She has even a premium account: "I am going to spend my time in this game, I would like it to be enjoyable." Very interested in beta-testing, she highlights: "I am a stay-at-home mother who does all of the house work ... constant hands-on testing. I am very critical and honest ... I tend to pick out the odd-ball stuff that most overlook."

She regularly checks SL forums, such as Second Seeker and Slexchange.

Lynette		"Relaxing and shopping"
Real Life	Job	Stay at home mum (and cinema assistant)
	Gender	Woman
	Age	32
	Drivers	Making her life easier
	Activities	Clean the house, visit SL forums
	Interests	Health, entertainment, music
	Favorite Brands	Apple iPod, Tide, Coke and Mr. Clean
Second Life	Connection	During daytime from home, for more than one year
	Drivers	Fun
	Budget	Premium account, 1,000 linden\$
	Interests	Malls
	Activities	Shopping, camping, teleporting
	Favorite Brands	Coke machines, stylists
	Suggestions	Less crashes
	Mood	Relaxed

Source: Analysis performed by DervalResearch based on 171 chat interviews with Second Life visitors, recorded by GMI from August 2007 to January 2008.

Figure 10: Online Persona # 8 – Lynette

9. Shawn: "Shopping and Finding the Perfect Look"

"I just love to improve myself," shares Shawn, social worker. In real life, he loves "the clothing from Only" because "it's affordable", thinks that "Coca-Cola is the only good coke there is" and that "Niveau has good products that are affordable too."

In Second Life, Shawn acknowledges: "I spend all my money on my looks. I try to find the best skins, clothing and shoes there are in SL, and I buy them."

Shawn		"Shopping and Finding the Perfect Look"
Real Life	Job	Social Worker
	Gender	Man
	Age	26
	Drivers	Improving himself
	Activities	Reading books, reading internet forums , writing sports, television, games
	Interests	Clothes
	Favorite Brands	Only, Niveau, coca cola
Second Life	Connection	At night, from home, for 6 months to one year
	Drivers	Finding the best look
	Budget	More than 1,000 Linden\$
	Interests	Realistic clothes, hair, shoes.
	Activities	Clothing shops, events , malls, dance clubs
	Favorite Brands	Last call, Topaz, Serina (clothing, shoes, hair)
	Suggestions	More music
	Mood	Curious

Source: Analysis performed by DervalResearch based on 171 chat interviews with Second Life visitors, recorded by GMI from August 2007 to January 2008.

Figure 11: Online Persona # 9 – Shawn

10. Martin: "Walking and Talking"

Martin is disabled and has a main hobby: "I clean and organize my apartment". He loves clothes, jewelry and cars: "they help alter my appearance." He is positive: "I am living life to the fullest, I eat the product I buy and I meet new friends and spend time with them.

In Second Life, it is much easier for Martin to walk and talk.

Martin		"Walking and Talking"
Real Life	Job	Disabled
	Gender	Man
	Age	33
	Drivers	Improving his appearance
	Activities	Internet, television, flickr, myspace, cleaning, arranging apartment, meeting new friends, eating
	Interests	Clothes, jewelry, cars, medication, new food product, cable tv, brand cigars
	Favorite Brands	Coke , Gatorade, Tag heuer, Kellogg's, Delta
Second Life	Connection	Day and night, from home, for less than one month
	Drivers	Making new friends
	Budget	budget of 1000\$+ per month
	Interests	Clothing , Wings
	Activities	Clothing shops , events
	Favorite Brands	Bape training shoes, Collage Rule, Kani Shirt
	Suggestions	Music while waiting
	Mood	Full of humor

Source: Analysis performed by DervalResearch based on 171 chat interviews with Second Life visitors, recorded by GMI from August 2007 to January 2008.

Figure 12: Online Persona # 10 – Martin

WHICH BRANDS HAVE TO BE IN SECOND LIFE NOW AND WHY?

Major players such as IBM, Coca-Cola and Philips are already active in web communities and particularly in Second Life – where you also find 100% virtual brands (for example Gurl, Serina). Some brands are currently mainly experimenting in virtual worlds, while others hope to increase their awareness or sales.

Based on SLIC results, DervalResearch can bring answers to the critical questions: "For which brands is it really beneficial to be in Second Life?"

New product development and commercialization

The Top 10 *Online Personas*, as described by DervalResearch, are willing to take an active part into new product development and commercialization, and this often only for a small reward.

Personas	Interaction	Reward	1. Initial Concept-Design	2. Prototype Validation	3. Beta-testing	4. Packaging	5. Channels	Feedback on SLIC
Gary	in a meeting	for money or 200 Linden\$	• •	•				Interesting, fast and easy
Marc	by chat/forms	for money or Linden\$	• •					Nice and brief
Chris	via feedback form	for money	• •	•		•		Very entertaining, great, interesting and easy to answer,
Bob		for Linden\$		• • •	• • •			Surprising, easy and fast
Kim	via feedback form	for Linden\$			•	•	•	Useless but fun
Ian	via on-demand feedback form	for free or a reward, depending on mood	•		•			Cool and fun
Paul	via focus group	for free	• • •					Interesting experience that could be improved
Lynette	via online feedback form	for Linden\$			• • •			Easy to answer, likes the idea
Shawn	via online feedback form	for money	•					Interesting
Martin	by email	for Linden\$	•		•			Easy and awesome

Source: Analysis performed by DervalResearch based on 171 chat interviews with Second Life visitors, recorded by GMI from August 2007 to January 2008.

Figure 13: Top 10 Online Personas and their favorite co-development activities

So Second Life is the place to be for firms busy with:

- Designing a new product
- Validating a prototype
- Beta-testing a product

Brands such as Apple for instance would benefit from working with Lynette on beta-testing, and BMW would benefit from working with Bob on prototype validation.

Innovative and fast-moving brands

When identifying the Top 10 *Online Personas*, DervalResearch also found some major common points between all these users of web communities.

The Top 10 *Online Personas* are:

- Sensitive to technology
- Curious

- Fond of clothes and design
- Interested in home decoration
- Patient
- Into social networks
- Willing to create
- Attracted by new products

If we translate those interests into industries, it gives a very clear idea of the brands that would benefit from a strong presence in web communities:

1. Technology / Electronics
2. Fast-moving consumer goods
3. Fashion / Luxury
4. Cars
5. Home decoration

Personas	Real Life Budget	Second Life Budget	1. Technology Electronics	2. Fast Moving Consumer Goods	3. Fashion Luxury	4. Cars	5. Home Decoration
Marc	•	•	Apple iPod	Coca-Cola, Pepsi Cola, Starbucks, McDonald's	Boss, Ralph Lauren, Nike, Adidas	Toyota	
Gary	• • •	• • •	IBM, Sanyo			Mercedes, Peugeot, BMW	
Chris	• • •	• •	Amazon, Google, Apple iTunes, Olympus		H&M		Villeroy Bosch, Next
Bob	• • •	• •	Sony-Ericsson, IBM, Lenovo, Microsoft	Unilever	Nike, Under Armour, K-Swiss	BMW, Chevrolet	
Kim	• •	• •					
Ian	• •	• •	Facebook, Microsoft, IBM, Philips, Sony	Coca-Cola, Senseo	L'Oréal, Nike		
Lynette	• •	• • •	Apple iPod	Coca-Cola, Mr. Clean, Tide			
Paul	•	•			Aveda, Rolex	BMW	
Shawn	• •	• • •		Coca-Cola	Only, Nivea		
Martin	• • •	• • •		Coca-Cola, Gatorade	Tag Heuer		
Most Cited Brands			Apple, IBM, Sony, Microsoft	Coca-Cola	Nike	BMW	

Source: Analysis performed by DervalResearch based on 171 chat interviews with Second Life visitors, recorded by GMI from August 2007 to January 2008.

Figure 14: Top 10 Online Personas and their favorite industries and brands

For brands, it's good to know that purchasing patterns for a same *Persona* may differ between real life and Second Life. Chris and Bob for instance will happily spend money for clothing in real life, but spend more time dancing, and making their own clothes respectively, in Second Life.

Online Personas' favourite (top of the mind) brands are Coca-Cola, IBM, Apple, BMW, Sony, Microsoft and Nike.

Online Personas next steps

With more than 170 one-to-one interviews conducted in five months, SLIC helped DervalResearch identify major patterns in the behavior of the members of web communities, and document in a very detailed way 10 *Online Personas*, their preferences and opinion on brands.

The next step for DervalResearch will consist in applying its *Online Persona* research framework to other major web communities, and detect more business opportunities for brands.

OTHER IMMERSIVE SURVEY TECHNOLOGIES: *BOTS*

Away from SLIC and the interview sofas, GMI has been working on integrating not only its survey software, but also its panel management software with Second Life. Some of the most interesting examples in a technical sense is the development of automated users (known as *bots*) to engage and interact with avatars inside the virtual world.

eLab City: face-to-face survey *bots*

On the academic research side, the University of California Riverside's Sloan Center for Internet Retailing is currently building eLab City in Second Life¹². Modelled as a live-work-play community, eLab City will provide a working laboratory and subject pool for academic research. Tom Novak, Professor of Marketing and Co-founder of the Sloan Center for Internet Retailing, hopes to study a wide range of issues, amongst them peer/social influence, decision-making, virtual consumption, group behaviour, merchandising, branding, research methodology and social capital.

eLab City's online academic panel of Second Life residents is being developed by integrating GMI's panel management software into Second Life. For conducting surveys, GMI has created wholly automated bots (Second Life users controlled by software rather than humans) that are able to approach and engage passing Second Life avatars in face-to-face interviews. In addition to the survey data itself, these bots can also collect meta-data – for example reactions to the way they look, or to the manner in which they approach people. As Novak puts it, "True physical attractiveness and social skills don't impact first impressions online, but what about virtual attractiveness and social skills? This is one aspect of research we will be studying."



Figure 15: Second Life survey bot

Half man / half bot

When Linden Lab, the company behind Second Life, released the source code to the Second Life viewer (the piece of software that connects a user to Second Life) as open-source early in 2007, it became possible for developers to create customized versions of the viewer, for example by adding specific functionality or new features.

GMI created an experimental modified version of the Second Life client which in effect acts as a market research interviewer terminal, turning the person who connects through it into a semi-human, clipboard-carrying market research interviewer who can walk around Second Life, chat with other residents, and – if they are willing to take part in a survey – switch to an automatic data collection mode¹³. Once this data collection mode is activated, the automated software kicks in, asking the questions as defined in the survey, and recording the responses given by the avatars in their chat. The respondent's answers are fed back to the survey collection software through the modified Second Life interviewer. Once a survey is completed, the interviewer can switch back to normal mode and continue on his way. It's a virtual intercept survey, so to speak, but obviously more efficient than its real-life counterpart due to the fact that all data is collected in real time, eliminating the need to enter data at a later stage. And again, incentives can be built into the process automatically, adding to the overall efficiency of such a virtual interviewer solution.

TO BOLDLY GO ...

While the practical uses of these examples may still be in their infancy right now, they illustrate that in virtual worlds, and Second Life in particular, a lot more is possible than just conducting simple web surveys. Thinking back about 10 years, the vast majority of web surveys simply replicated telephone surveys in a web browser, not making full use of the multimedia capabilities available to them through the use of the new medium. As the virtual worlds are themselves getting increasingly sophisticated, with the right combination of technical prowess and imaginative thinking, marketers and market researchers will be able to provide survey experiences in virtual worlds unlike any we've seen before.

In any environment, whether real or virtual, the survey experience is key. As companies and marketers are starting to experiment in Second Life, there is a growing feeling that many are simply doing it for PR's sake, without any real relevance to Second Life residents. The more engaging and rewarding the survey experience is, the more likely it will be seen as an integral and useful part of the virtual world, rather than a disjointed bolt-on from the outside. Despite what is sometimes claimed, Second Life users aren't hostile to brands and marketing involvement per se: a GMI poll¹⁴ that surveyed more than 9,000 residents in the U.S. in 2007 showed that Second Life is a burgeoning market for real-life brands and product promotion. Fifty-six percent of users questioned believe Second Life is a good promotional vehicle. Only 16 percent say they would not be more likely to buy or use a brand that is represented in the virtual world. Around the same time, a survey by Market Truths showed that 49% of SL residents think the presence of real life brands is positive, and about a third have a neutral attitude¹⁵. However, precisely because virtual worlds are such an engaging medium, users do expect marketers to engage them in return, offering creativity and inspiration, not just replication of traditional *one-way* advertising or marketing campaigns.

Second Life is increasingly seen as the first incarnation of a coming 3D Internet or *metaverse*, and it's not that far-fetched any more to imagine a time in the near future when our avatars will wander a Web of connected, virtual spaces instead of today's flat, relatively impersonal 2D web environment. Linden Lab is today actively working with IBM and other companies on making this vision a reality¹⁶. Gartner suggest that 80% of Internet users will be active participants of virtual worlds by the end of 2011¹⁷, and Forrester write in a recent report that "virtual worlds are on the brink of becoming valuable work tools," and that "within five years, the 3D Internet will be as important for business as the Web is today"¹⁸. No matter what time lines and predictions are made, marketers and market researchers can be at the forefront of this new frontier by taking advantage of available technology right now. And as our experience with SLIC shows, this isn't just pie in the sky – there are ways to use Second Life right now to create real actionable insight.

FOOTNOTES

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