



# Digital consumers behaviour in the digital environment

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## Background: the brief

- Explain the transition and transformation: how *consumers* have evolved into *digital consumers* and how they now behaviour
- Not a wake up call or shock and awe piece (although pretty scary); more a case of spelling out the facts and realities, explaining emerging theories and paradigms and making evidence-based forecasts
- Generally we communicate to academics, policy makers, content providers, publishers and libraries. But not in Benelux countries; here we talk to marketing people. Interesting!
- Talk built on huge evidence base; result of ten years studying people in cyberspace. Never known so much about how people find and use things. Not on e-shopping specifically, but behaviour platform dependent and tend to behave same when we move seamlessly from one sector to another
- Really interesting thing, from your/our perspective, is many of you will never have heard this before
- Very timely as we are being visited by the 'Perfect Storm' – whipped up by fast information behaviour, smartphones, social media and the Google Generation.

# Background: mug' guide to the methodology

- Based on evidence-base of what people *do* in digital space; not what they *say* they did or *wished* they did. People have problems recalling what they did in digital space (partly because genuinely cannot remember and partly because would rather not tell you)
- Need methodology, a non-intrusive one, to study behaviour in anonymous, remote virtual space. CIBER obtain data from millions of digital footprints people leave when visiting a website/using a digital service, via mobile, personal computer, touch screen kiosk and digital television
- Making sense of these footprints for ten years: turn *activity* represented in logs into *usage*; then stitch together to form patterns of behaviour; then, sometimes, with the help of focus groups/interviews etc., turn that into consumption, satisfaction, outcomes and KPIs. Covered the media, education, publishing, health and cultural fields; says very much the same thing.
- No sampling! We know about the behaviour of millions of people and will describe key characteristics.
- Data point to fact that our behaviour has fundamentally changed as a result of our migration to the virtual space. Or, maybe, we just never knew how people behaved before and worked with 'imperfect' paradigm.
- The digital is rewiring people's brains so we are going to have to understand and live with it.



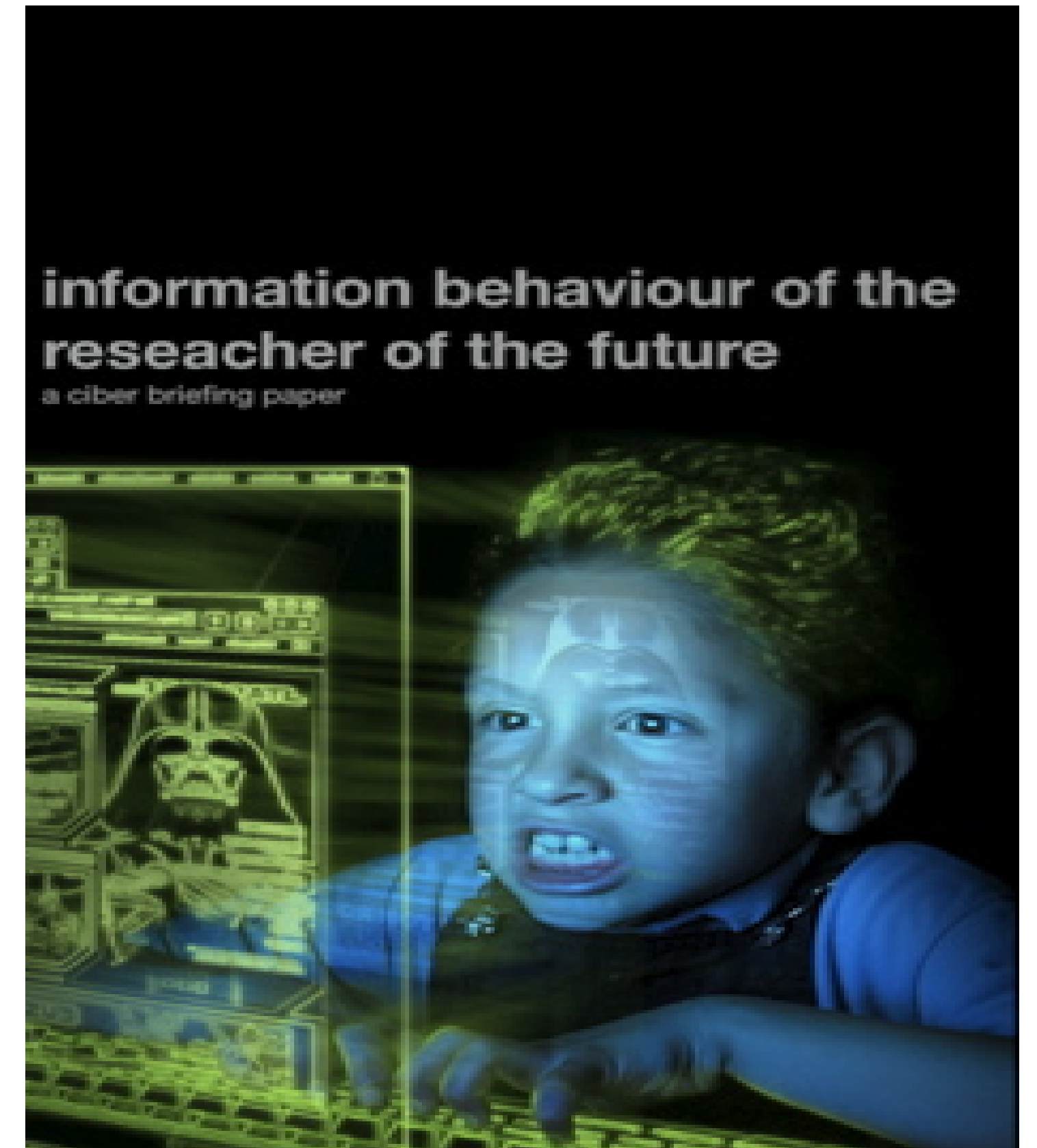
# Backgrounds: the transformations (1)

1. Digital transition creates unbelievable **access** to everything and brings search, evaluative and research skills to all aspects of life, including e-shopping *and* **blows up** existing disciplinary boundaries
2. Disintermediation (DIY) is a consequence, and results in massive and changing **choice**, courtesy of Google, the agent of 'anarchy'. All 'experts' now we are all attached to big fat information pipe
3. Transition further to go, with mobiles, reading devices and e-books, drawing in a wider group of people, once in slipstream of digital transition into mainstream (general public, arts & humanities)
4. Transition means, in theory anyway, that more and more human behaviour goes on **remotely** and **anonymously**
5. Consequences : parents, teachers, publishers, retailers etc. know less and less about the activities of more and more

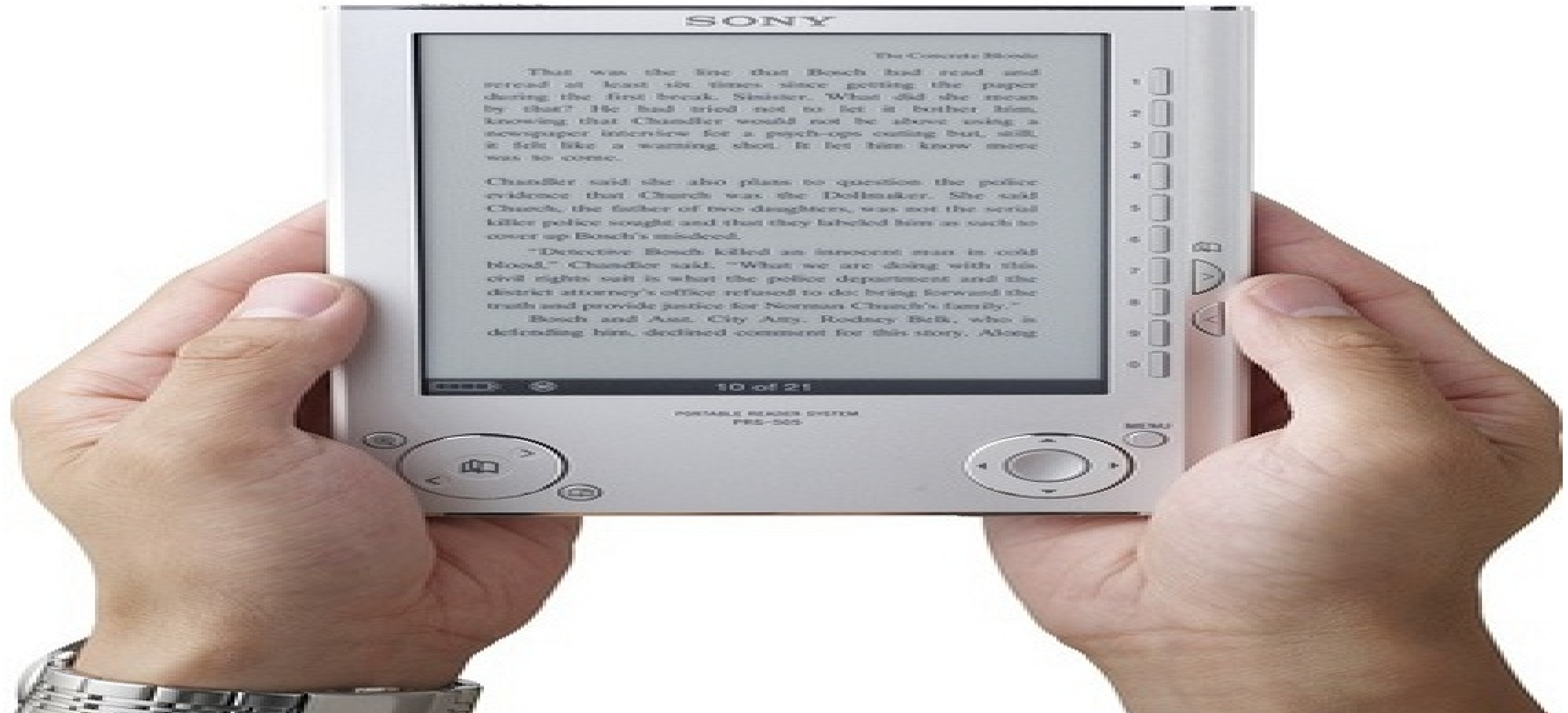


## Background: the transformations (2)

6. Leads to decoupling from audience and action and, possibly, professional and business melt down
7. Compounded by fact that the virtual has fundamentally changed the way we seek, use and communicate. Double whammy!
8. In the vacuum still working on basis of old, *uninformed*, paradigm; in parallel universes
9. Badly need to visualise, conceptualise and act on what is going on, especially in respect to the born digital, who know no other way
10. And not much time to do so, our e-commerce colleagues tell us, an internet year is just seven weeks!



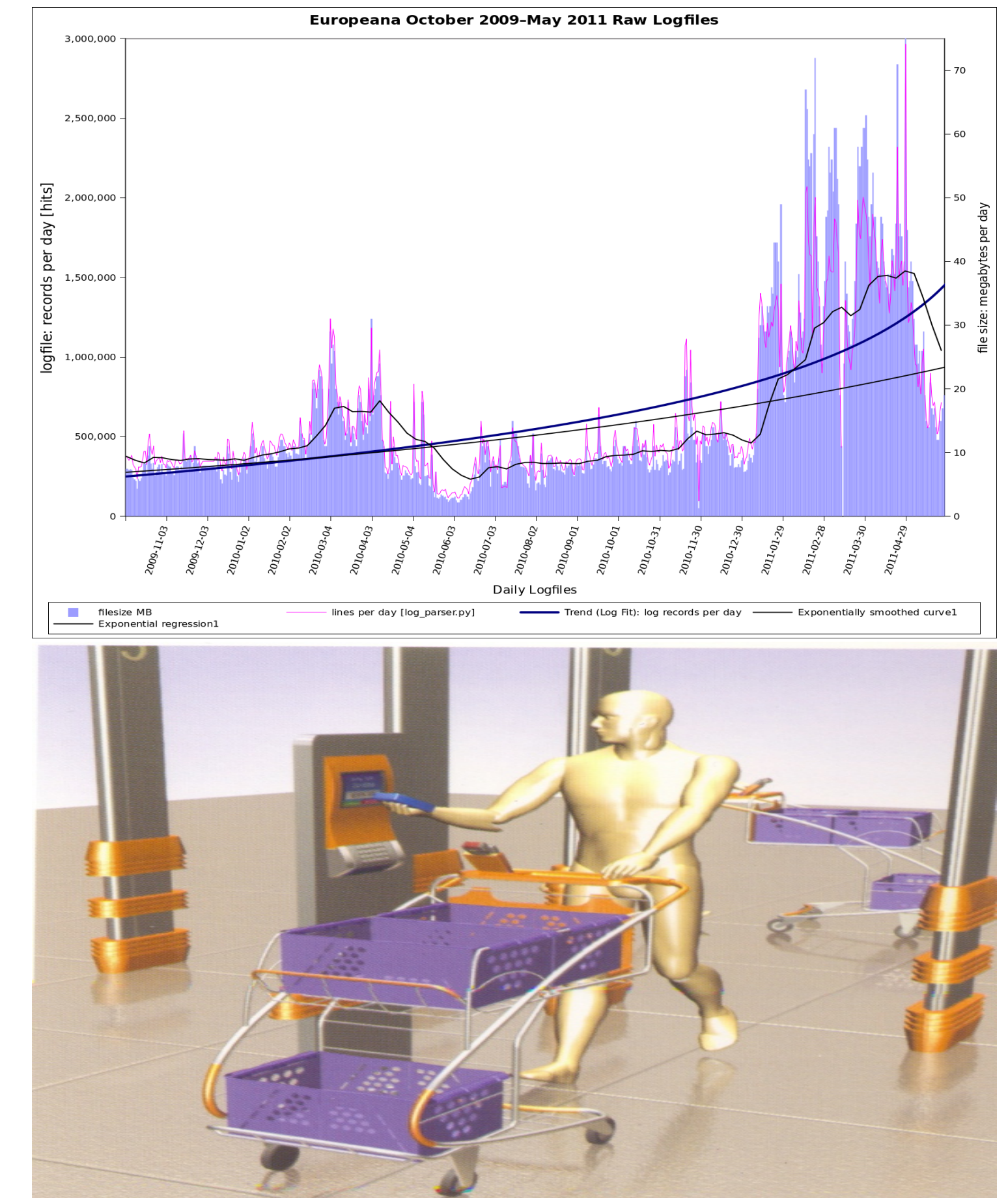
So how do people behave when they move into the virtual space?





# 1. Loads of activity and much of it robotic

- Staggering volumes of activity
- Access and disintermediation the main drivers:
  - a) new users drawn into information net (all scholars, journalists, librarians now). Everyone has access to big fat information pipe. Put it up there and it **will** be used!
  - b) existing users can search more freely & flexibly – 24/7 anywhere
- Huge growth put down to:
  - a) more digitization; b) preference for everything digital; c) India and China; d) wireless/broadband; e) mobile devices – platform of choice for accessing web content in two years time (more on this later)
- However, lots of ‘noise’ (didn’t mean/want to use), and robots/crawlers - account for 80-90% of all activity. Robots good for you; the new intermediaries? Drives human traffic.



## 2. Bouncing

- Most people view only 1-2 pages from thousands available; 3 is a lot
- Around 40% do not come back – they are promiscuous
- ‘One-shots’ abound (one visit, on page)
- Bounce because of:
  - search engine searching (provides lots of choices and noise) and links (constantly enjoined to go elsewhere)
  - massive and changing choice
  - so much rubbish out there
  - ‘acceptance of failure’ – result of pragmatism, lack of time & overload
  - poor retrieval skills (2.2 words per query and first page up on Google)
  - leave memories in cyberspace, which adds to ‘churn’ rate
  - direct result of end-user checking, in absence of intermediaries have become addicted cross comparison





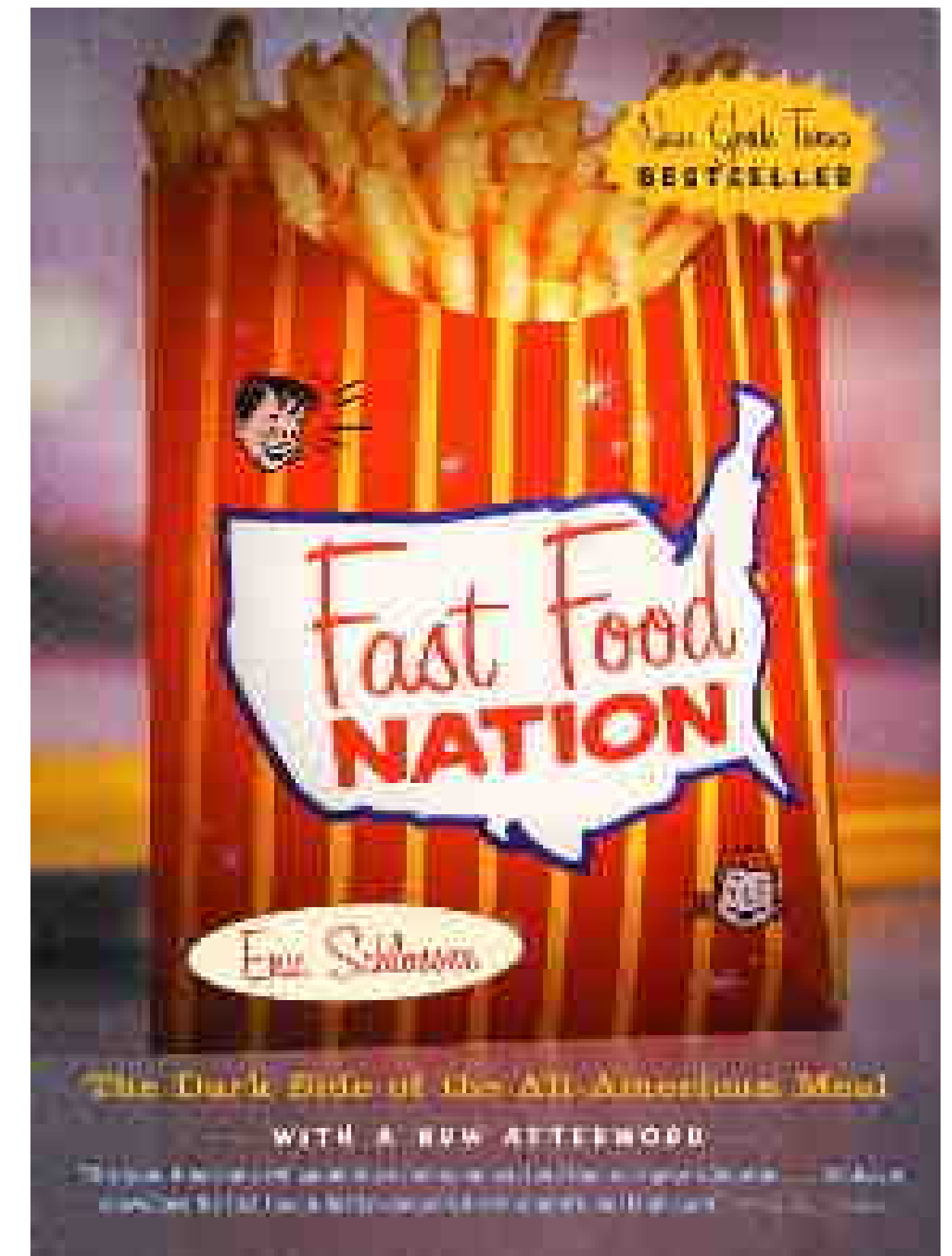
### 3. Horizontal has replaced the vertical

- In information seeking terms the horizontal has replaced the vertical: 'skittering' (move rapidly along a surface, usually with frequent light contacts or changes of direction) is the norm
- People 'power browse', drive-thru titles, headings, links & summaries at a fast rate and its pleasurable. Charge for abstracts and give away PDFs!
- Building of digital motorways through content means movement itself is pleasurable...there might be something interesting around the corner. Lots of things never connected before – enter serendipity and nostalgia
- And then there is multi-tasking – always more pleasurable to do several things at once rather than one thing
- We don't do 'deep' anymore (more on this later)



## a. 4. Fast information

- As in life, the (information) snack/bite has replaced the three course meal
- Been conditioned by emailing, text messaging, tweeting and PowerPoint to like/produce/want fast information
- 'Fast bag pick-up' the gold standard
- Don't come in the front door
- Web designers & content providers thought we would dwell and knock on the front door. Do you remember site-stickiness?
- Avoid carefully-crafted discovery systems. Love Google

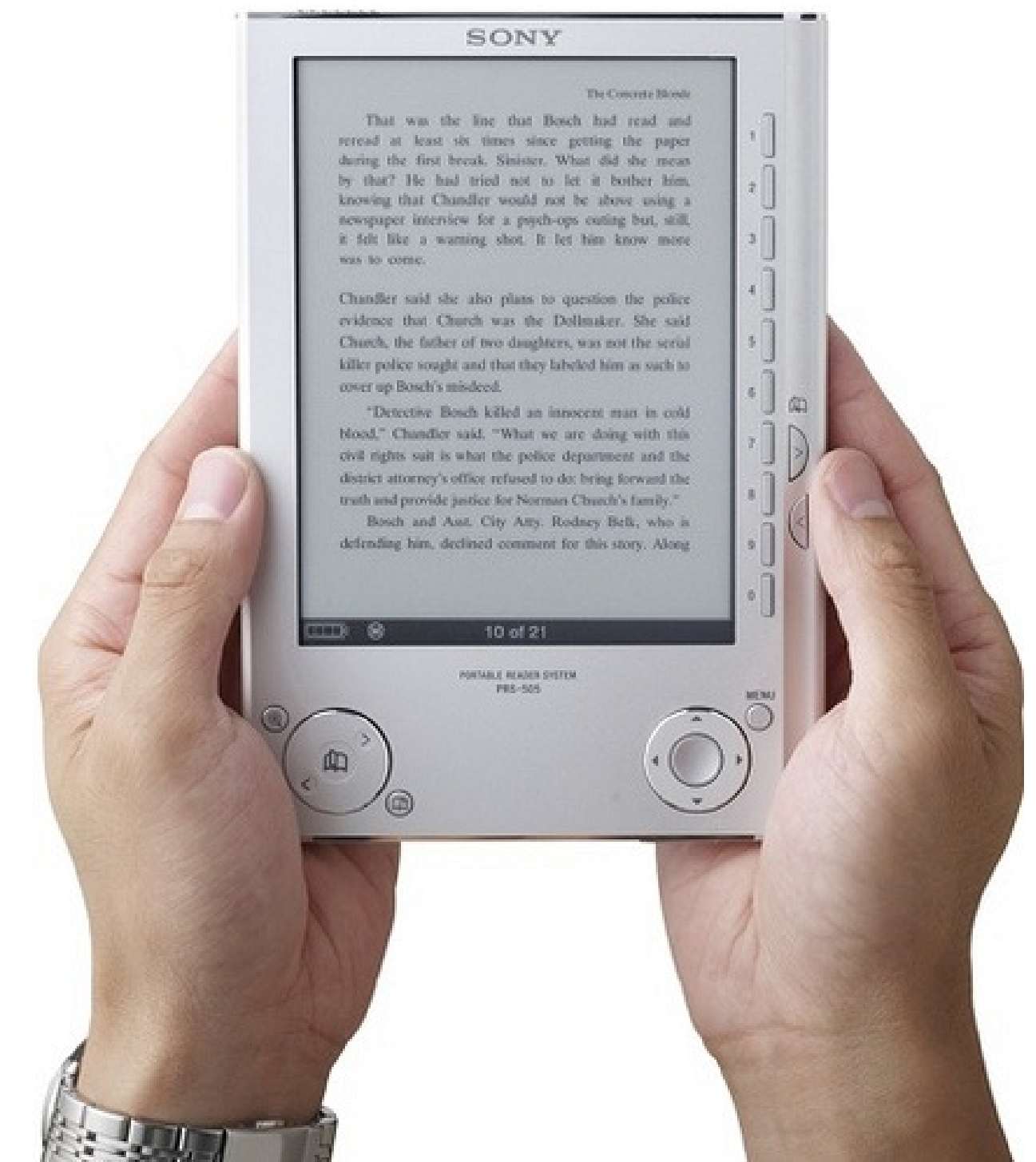


## 5. Viewing has replaced reading

No shock then nobody in this environment does much reading or certainly not what is traditionally thought to be reading (reading whole documents)

Logs tell us:

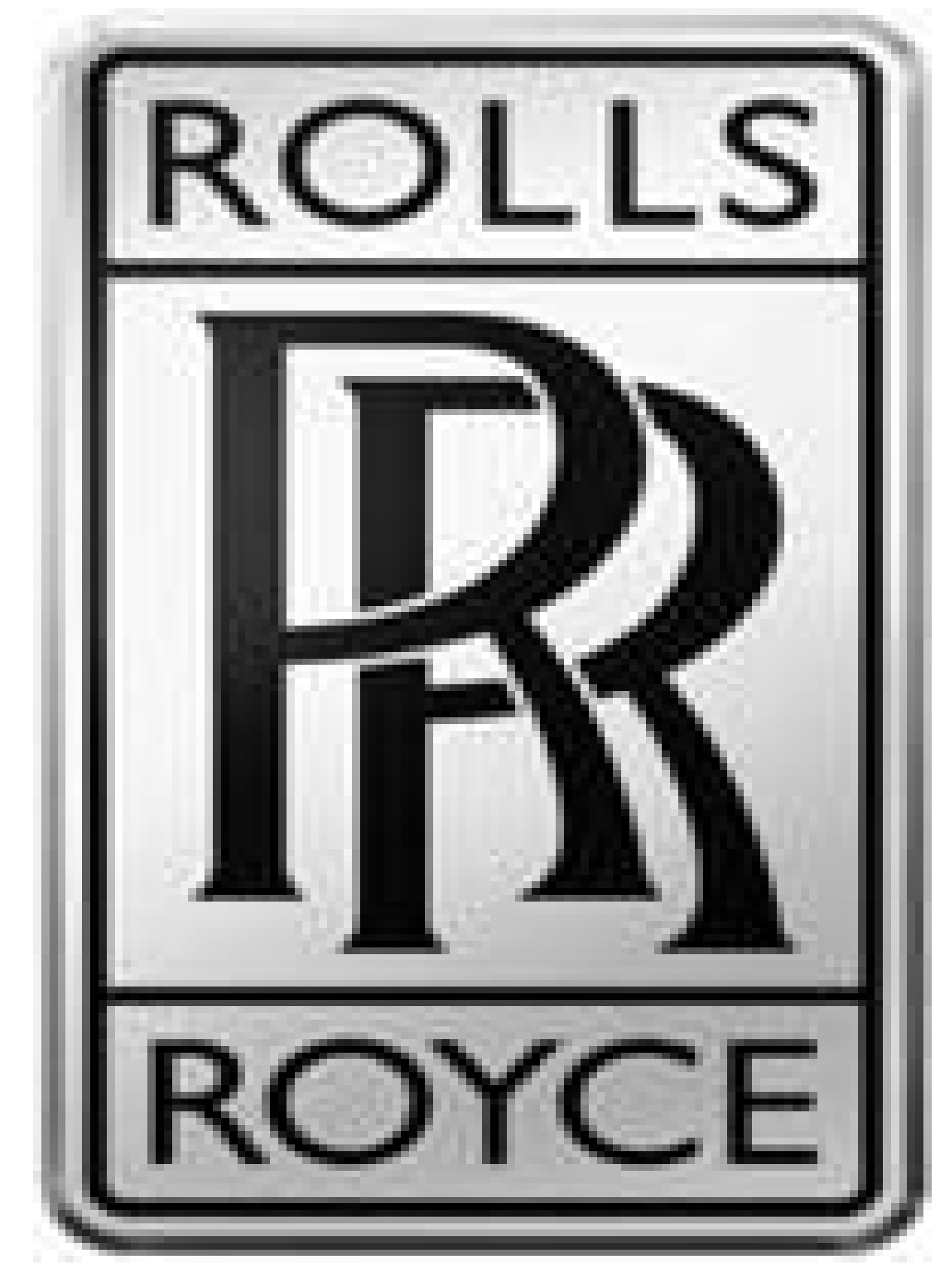
- People seem to go online to avoid reading;
- Typically, only a few minutes spent on a visit, and 15 minutes is a very long time;
- If it is an article then 3-4 minutes will be spent on it;
- Shorter articles have much bigger chance of being viewed;
- If article is long, the summary will be read or it will be downloaded - squirreled away for another day (when it will not be read!). Something we call 'digital osmosis'..



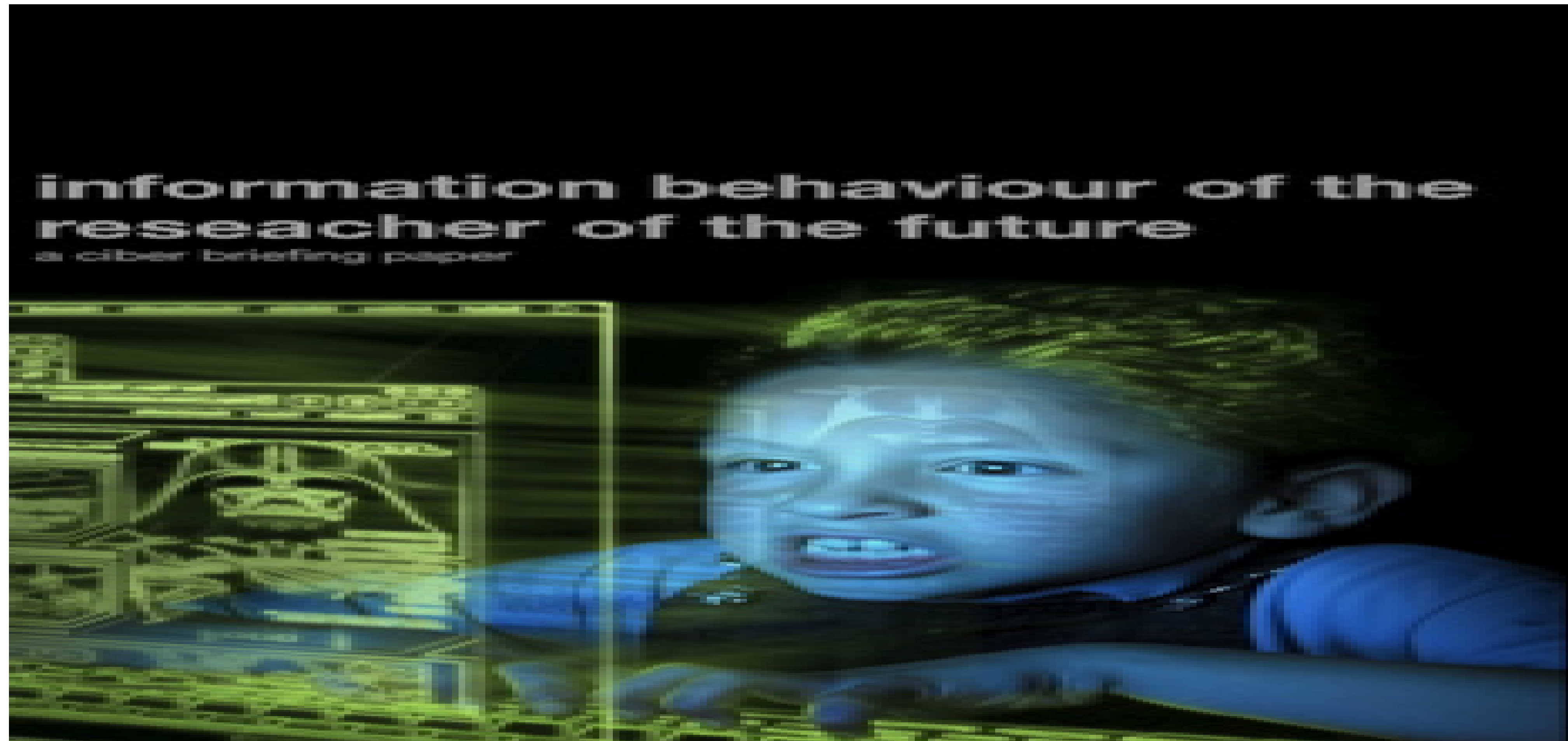


## 6 Assessing trust and authority not easy

- Huge choice, overload, so much churn, no intermediaries to help, and so many players means responsibility & authority almost impossible to establish in cyberspace. Don't even know whose information it is!
- So how to choose? Typically first ones up (usually Wikipedia), by cross-comparison (OK if you know field); or ask a friend via Facebook or twitter (OK assuming they know). Crowd sourcing beginning to beat peer review
- Historically trust signified by saying 'established' (since 1950, for instance); probably works the opposite way now (Wikipedia just 10 years old; Facebook barely 10, and twitter 5)
- Also what you think is a trusted brand is not necessarily what other people think. Younger they are less likely to recognise traditional brands. Tesco!



# Game changers 1: the Google Generation



# The Google Generation

- Where we came in, worries about what young were up to, carrying that into adulthood. So what do they do:
  - Have greatest appetite for fast information and skittering
  - Quickest searchers, spend least amount of time on a visit – fraction of the time spent by adults.
  - But least confident about their answers. Lack of confidence explained by their behaviour – first one up, view fewer pages and domains and do fewer searches. First past the post approach endemic.
  - Queries much closer textually to questions posed, making them, not just fast food generation, but also ‘cut and paste’ generation. As for multitasking, at which they are supposed to excel, they do it a lot, but not very well.
  - Young fast forwarded from a world where the focus was on knowing one big thing well to a world where you know many things, but not very well.



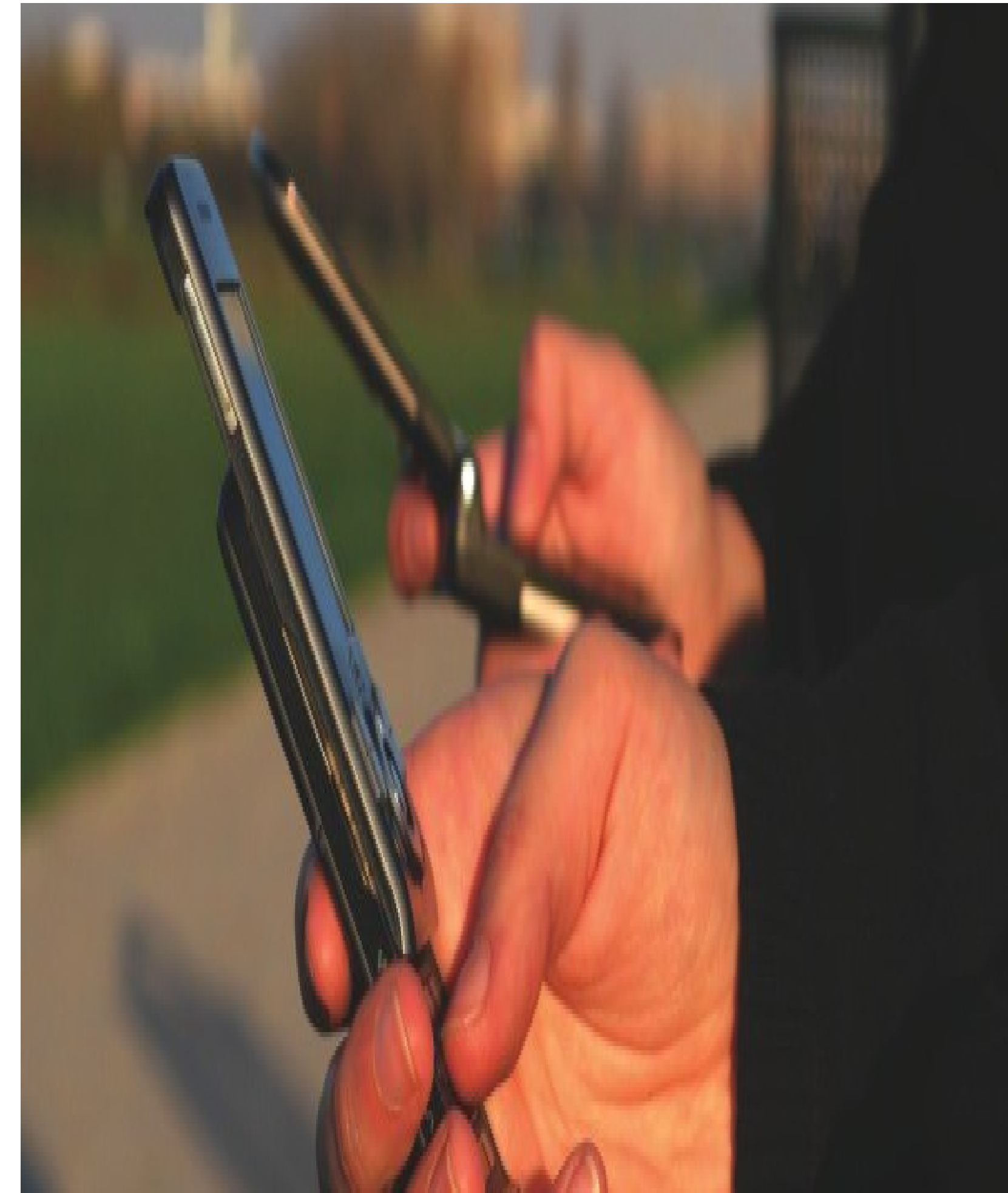


## Game changers 2: mobile devices!



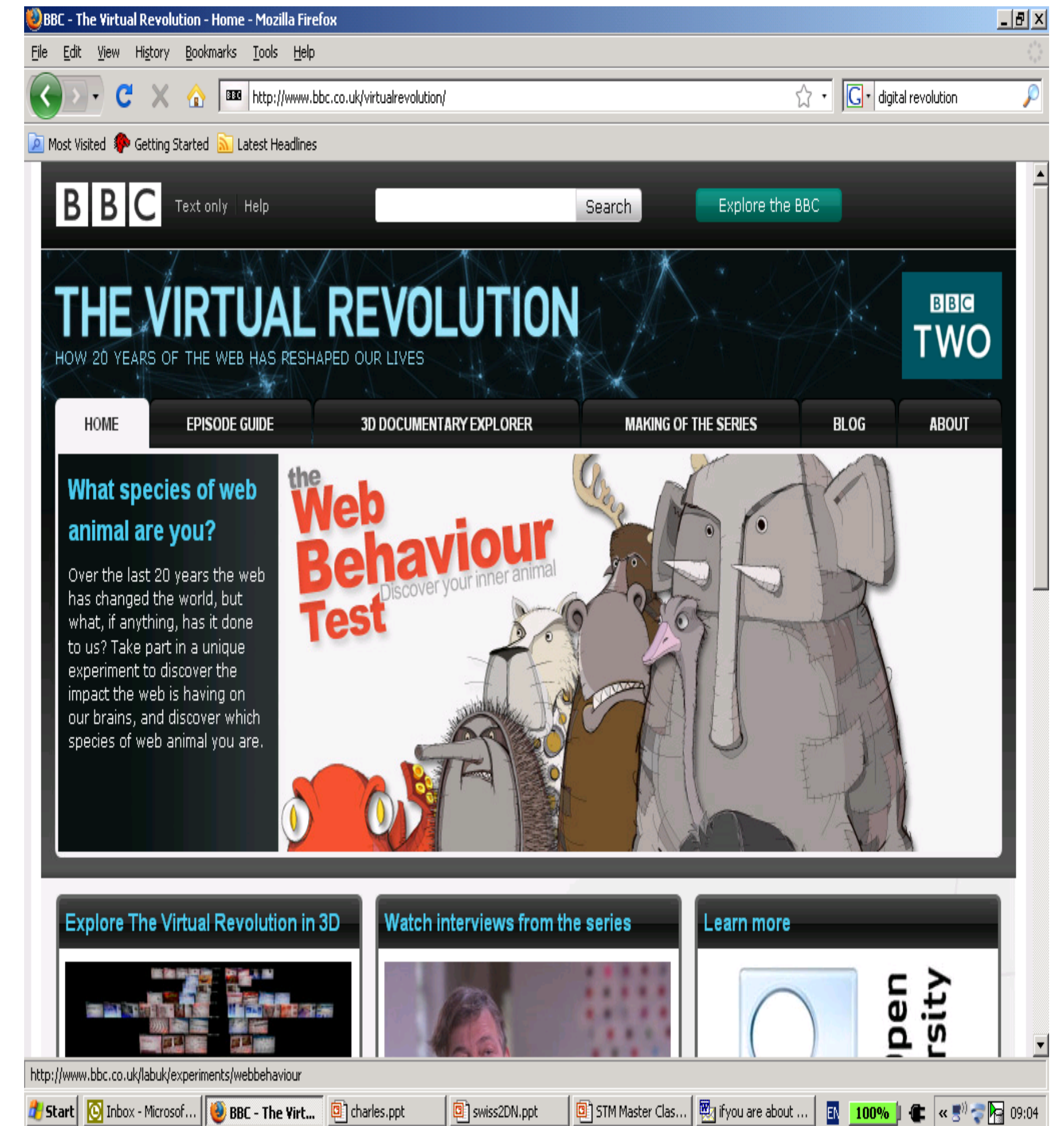
# Smartphone (and tablet) will kick it all up to another gear

- Hottest platform: huge growth, big, wide audience and 'cool'
- Ask a young person about the library and they will point to their phone
- Offers different user experience from PC. Redefines the consumer 'personal computer' experience; access-device rather than a computational machine.
- Not surprisingly has a big impact on information use and seeking behaviour:
  - Mobile use more "personal" and less "professional". It happens in the evening and at weekends; occurs in the home or 'anywhere but the office'.
  - Information 'lite'. Compared to PC/laptop visits typically shorter, less interactive, less content consumed and less likely to lead to satisfaction and return. More one-shots.
  - Big differences between devices, with iPad delivering similar behaviour to the PC and the Blackberry the most extreme 'lite' behaviour



# Which takes us nicely to web profiling!

- Bet you don't know I am a dog!
  - This made us think if:
    - a) the reins (!) have come off as a result of disintermediation and migration to the virtual space, and we are behaving so differently; and
    - b) we are moving most of our social and work activities to the web
- then we should replace personality profiling with web profiling
- So undertook a huge experiment with the BBC
  - Actually generated interest among UK advertisers and marketers, in regard to selecting their staff....





# Web profiling

- Characterised behaviour by tracking what people did online in respect to a number of questions and relating it to demographic background, working memory, multi-tasking ability, use of social media etc. On the basis of performance people assigned a web animal which fitted their behavioural style. Eight animals types used. Take two:
- WEB FOX. *Foxes are good at finding information quickly. They are highly social, maintaining complex relationships with the other members of their social group, often using social networks, or other sites whose content is created by its users, as sources of information. Web Foxes are multi-taskers, able to do several things at the same time. found that Web Foxes tend to be younger (16-24), less experienced web users.*
- WEB HEDGEHOG. *Hedgehogs are careful internet users, taking their time to find the right information. They prefer to go it alone, rarely relying on social networks and are specialised web users, best suited to concentrating on one thing at a time. Web hedgehogs tend to be the less-experienced web users.*





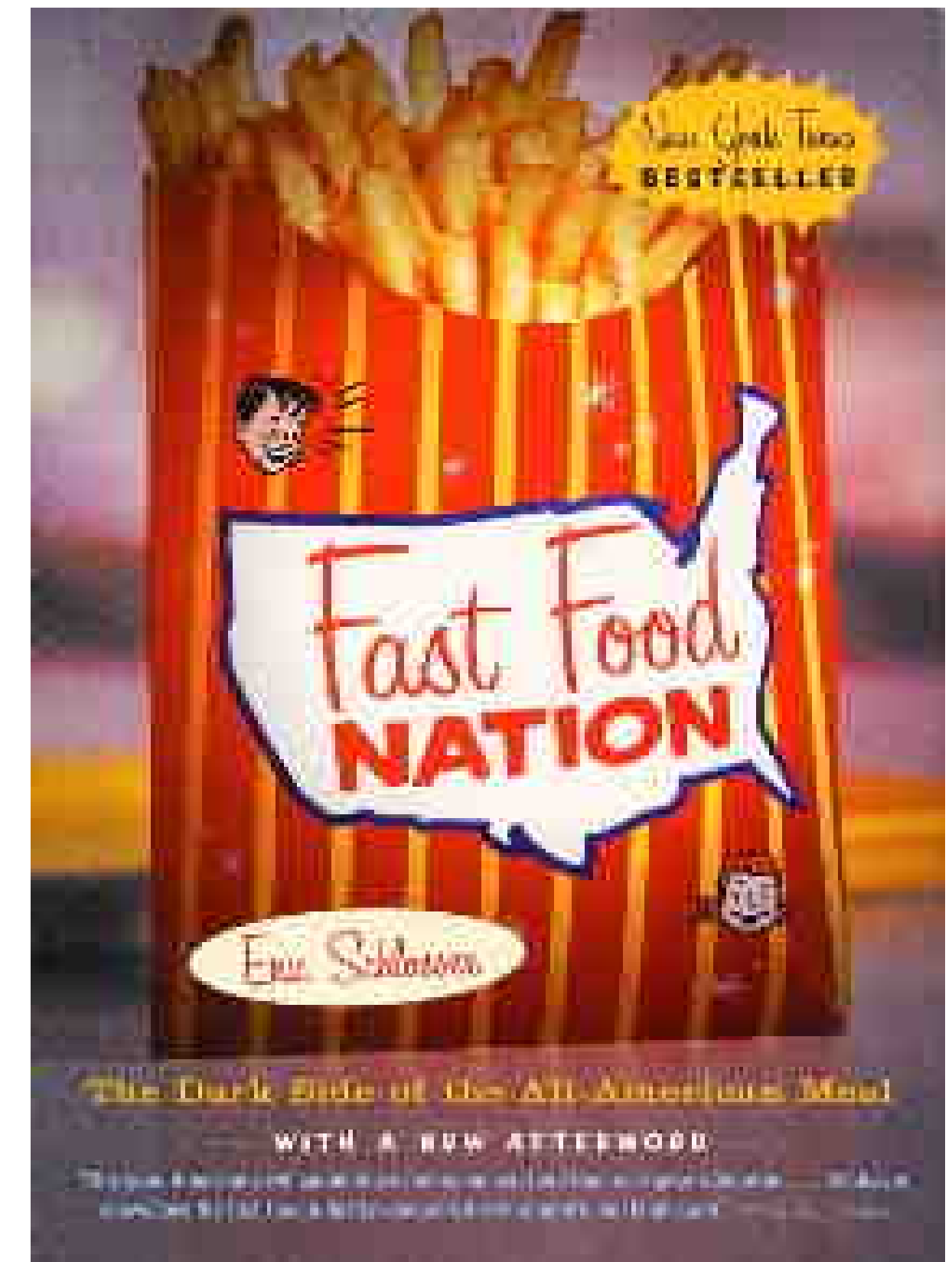
# Big issues and reflections

- Neurologists say digital behaviour changes pattern of connections in brain – introducing new ones/dispensing with old ones; because of plasticity, young brains rewire quickly
- Brain gets endorphin rush for finding information. So skittering could impact negatively on established skills as it chips away at capacity to concentrate & contemplate. Leads to speculation that digital makes us stupid!
- Propensity to rush, rely on point-and-click, first-up-on-Google answers, along with unwillingness to wrestle with uncertainties and an inability to evaluate information, could keep us stuck on surface of 'information age'; not fully benefiting from information society and 'always on' information
- Writing been on wall for years about lack of reading but lulled into complacency by sheer amount of 'activity' taking place in cyberspace
- Witnessing death of reading? No, just marginalisation of deep reading, and emergence of power browsing or reading 'lite'.



# Big issues and reflections

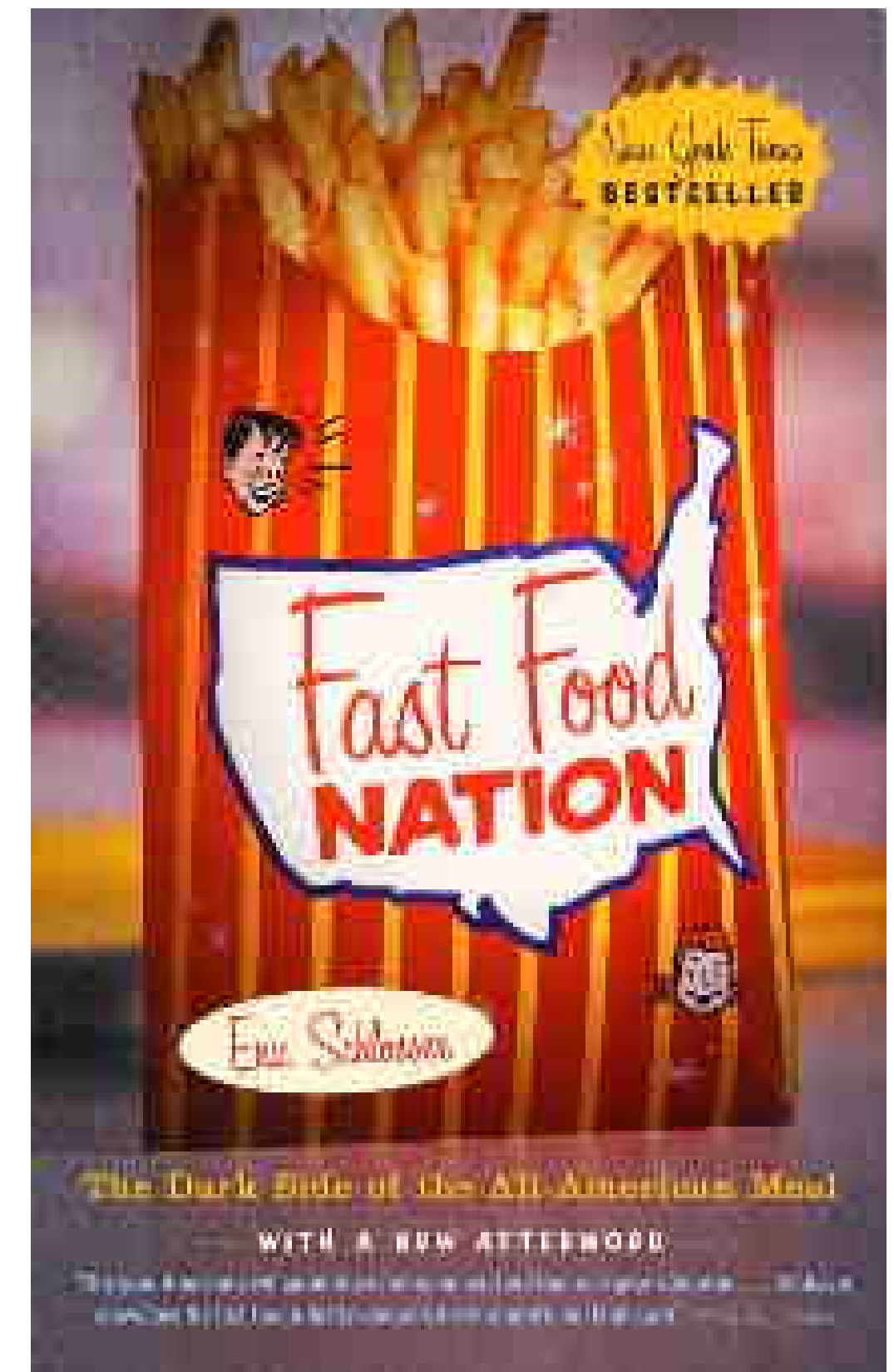
- Maybe McLuhan's universe of linear exposition, quiet contemplation, disciplined reading and study is an ideal which we all bought into and developed services around. But...
- Maybe always wanted to skitter and power browse and did so when we could (out of view). Difference now is that opportunities for skittering are legion and this creates more skittering and pace is not letting-up (twitter!)
- Big question : Will Google Generation turn out to be fundamentally different from older generations in attitudes, expectations and behaviour when become doctors, politicians, lawyers and **shoppers**? Will they even 'think' differently?
- And, the million dollar question, have we dumbled down? The Victoria test!





# Checklist for retailers and marketers

- If retail is detail then digital footprints are detail in abundance
- Done much work in scholarly publishing, first sector to move into cyberspace, pre-dating e-shopping by 5 years, so maybe you can profit from this. Here goes:
  - ✓ Smart phones/tablets reshaping websites; tail wags the dog!;
  - ✓ Organisations live in a parallel universe; dump the baggage and move over;
  - ✓ Websites (businesses) are 'quiet', one-way;
  - ✓ Speed and access trumps content; fast is very good. A consumer KPI;
  - ✓ Do airport, fast-bag pick-up test (cross comparison sites function on these lines);
  - ✓ Monitor, monitor and monitor, new things are coming online all the time, **and** create a user feedback loop (the living, organic website);
  - ✓ We use bespoke methods but Google Analytics can give you a considerable leg up;
  - ✓ Outcomes/satisfaction easier to determine where people pay but maybe more people would pay more if other aspects of service subjected to



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