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CREATE EFFECTIVE CHAT SURVEYS

How to rethink your online survey for messaging channels

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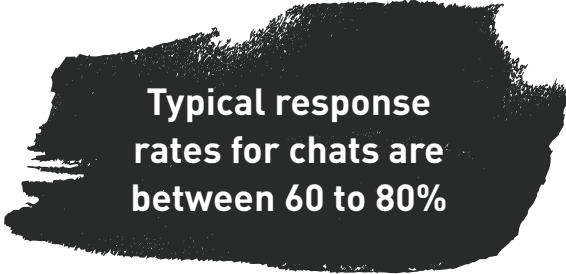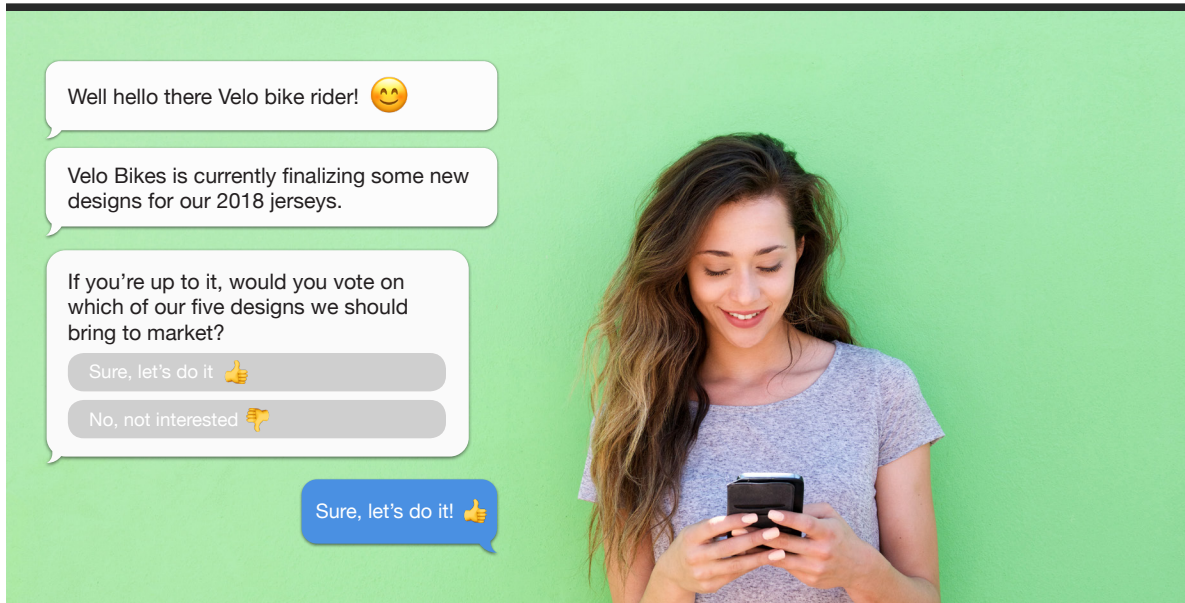
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Chats are set to disrupt the future of survey research.

The popularity of mobile messaging apps—along with the continuing decline of emails—is driving the increasing adoption of chats as a new way of engaging customers, fans and employees for feedback.

For many researchers, chats represent a new and significantly different way of surveying respondents 😎. The interface respondents see in a chat doesn't resemble that of a traditional online survey. Respondents also have very different expectations when they're in a messaging app than answering a traditional survey. Chats require a rethinking of how you design and write your questions and responses.

Typical response rates for chats are between 60 to 80%

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What are chats, and how are they different?

Chats are surveys hosted through messaging apps (like Facebook Messenger) or web browsers. Unlike traditional surveys, chats are conversational and are therefore more friendly, informal and shorter.

Through a mix of texts, buttons ⭕, images 📸, audio files 🎧 and video 📽, chats provide a more fun way for respondents to share their feedback. Chats rival traditional surveys by providing researchers and marketers a way to seamlessly reach respondents through apps they use frequently.

WHY MESSAGING APPS?

In the market research industry, email has become the dominant way of distributing surveys and reaching customers. But this channel has become saturated. With 281 billion emails sent every day[1], people are suffering from email overload. 👎 Across all industries, less than 25% of emails coming from businesses are opened today.[2]

Outside of work, people are rarely on emails. And this situation is even worse among Gen Z and younger millennials. Many of these young consumers only use emails to register for accounts on social networks and apps, but don't open their inbox on a regular basis. 🙅‍♀️

On the other hand, messaging is widely used both as a way for people to talk to each other and to interact with brands.

1.3 BILLION

1.3 billion people use Facebook Messenger each month[3]

10 BILLION

10 billion messages are sent between people and businesses on Messenger each month[4]

150 MILLION

As of 2018, 150 million people (53.6% of internet users) in the U.S. use messaging apps[5]

51%

51% of people say messaging has replaced other forms of communication, according to a 2018 report from Facebook[6]

Chats are:

MOBILE-FIRST

They aren't simply online surveys resized for mobile devices. Chats are a complete reimagining of the survey experience optimized for mobile.

PERSISTENT AND TIMELY

Since chats are pushed through messaging apps rather than emails, people are more likely to respond. You can time deployment to get feedback while respondents are "in the moment." 👌

CONVERSATIONAL

Chats leverage the same channels that people use to talk to their friends and family every day. The experience feels more like a conversation rather than a run-of-the-mill survey.

A SOURCE OF RICHER INSIGHTS

Open-ended feedback can be requested as text, image, video, or audio—giving your insights more context and color.

In this guide, we'll share simple and proven tips that will help you get more out of this new and exciting way of talking to your respondents at scale. 😍

Chats are a complete reimagining of the survey experience optimized for mobile

Rule #1 :
Be Conversational

🤔

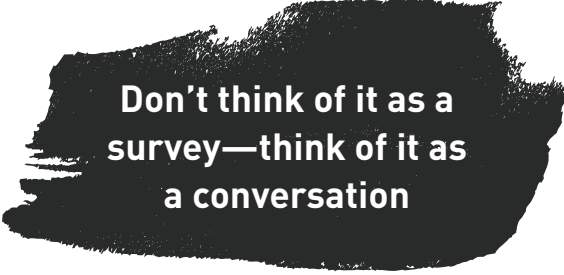## As researchers, we're sometimes guilty of getting stuck in our old ways.

We use the same phrasing in our questions ("on a scale of one to 10…"), responses (very satisfied, satisfied, etc.) and sometimes even in our invitations. 😐

Often the way an online survey is written doesn't sound anything like how people talk with each other. Creating effective chats requires reconsidering survey-design practices.

Rather than thinking of a chat as a survey, think of it as a conversation. This means everything about your chat—from the way you phrase your questions to the way you use images—needs to closely mirror how people interact with each other.

A chat should feel more like a natural dialogue with a person rather than a back-and-forth with a robot. It should sound more casual than formal. It should be something people are happy to complete.

👉 Adopt a conversational mindset and you'll be in a great position to create effective chats. 👈

Don't think of it as a survey—think of it as a conversation

TRANSPARENCY IN YOUR CHATS

While chats should mirror human conversations, they should not deceive your respondents. It's important to let people know they are interacting with a chatbot rather than a real human.

Do this upfront—perhaps in the invitation or the first messages in the chat. Some jurisdictions such as California are starting to put laws in place requiring chatbots to disclose that they are not human.[7]

Be honest about the purpose of your chats.😇 Tell people what the chat is all about, and why you're engaging with them.

Being transparent and setting the expectations early builds trust with your respondents, which will, in turn, help increase response rates and participation for your chats.

Rule #2:

Consider Both Brand Personality and Context

😎

Giving your chats a personality will make them more engaging and fun for people to complete.
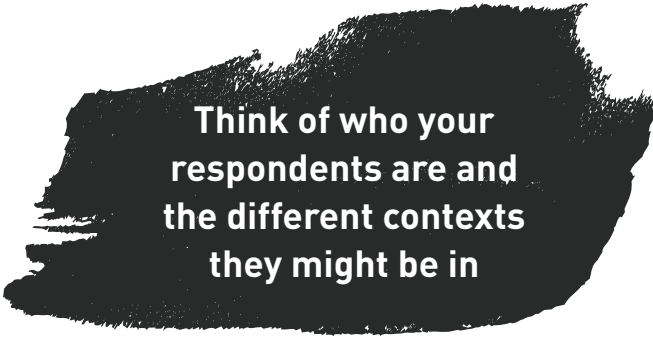
The words that you use, the casualness of your tone, and even the images you use all help shape the experience. It's a good idea to explicitly define your personality early so you can deliver a consistent chat experience.

Use your brand's guideline on voice and tone as a starting point. Your chats should feel like a natural extension of your brand experience. The tone and voice your company uses in your existing content should be reflected in your chat personality. 👐

That said, don't forget about context. Think of who your respondents are and the different contexts they might be in while answering your chats, and then adjust your chat personality accordingly.

For example, if you are broadcasting a chat during a live sporting event, your personality can be energetic and excited; however, if you are asking for feedback about people's most recent store visits, you might want a more neutral tone in case you have people who leave negative comments.

If you are sending a chat to engage Gen Z consumers, get a teenager to test it. The goal is to sound appropriate—not to sound like an older person trying too hard. 😉

Think of who your respondents are and the different contexts they might be in

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RULE #3:
START WITH
A BANG 🙌

Most surveys begin by asking for demographic information.

We ask for people's age, marital status and gender. Sometimes we even ask for people's income right off the bat.😳
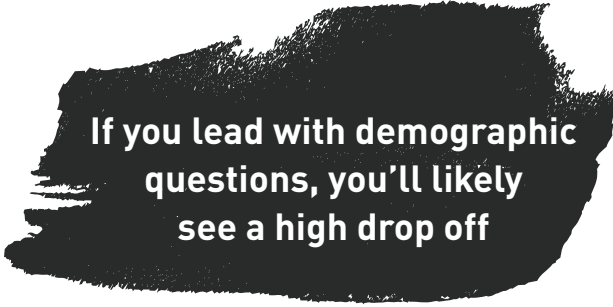
But this long-standing practice doesn't work in chats. In fact, if you lead with demographic questions, you'll likely see a high drop off.

Two issues emerge when you start with demographic questions:
1. It's not the most engaging way of starting your chats.
2. It turns off people. In particular, younger people, who may not be as familiar with the experience of traditional surveys, may find it odd you're asking for personal information.😒

A better option is to start with an engaging question—something that most people would be happy to answer. Think about how you'd naturally open a conversation with a friend or an acquaintance, and then emulate that approach in your chat. **One option, for instance, is to ask for people's opinions about a timely or hot topic.**

You might be wondering, "what if I really need to start with the demographics because of quotas?"🤔 If there isn't any way around it, then explain in your chat why you need this information. Don't assume people understand your intention or goals.

If you lead with demographic questions, you'll likely see a high drop off
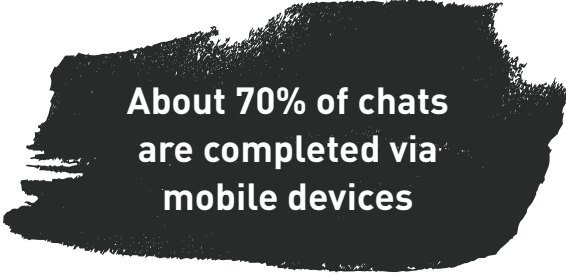
RULE #4:
SIMPLIFY AND SHORTEN

About 70% of chats are completed via mobile devices. Designing your chats for mobile-first respondents isn't optional—it's imperative.

Chat respondents, by virtue of being mobile, can be anywhere. They could be completing the chat while at a live event, on the train or during a break at work. Often, mobile respondents don't have a lot of time. 🏃,

After doing their first chat, about 80% of people agree to be recontacted. Because respondents are likely to subscribe, it doesn't make sense to put every question you can think of in a single chat. If you need more information, save some questions for future chats.

Being succinct also applies to your sentences and paragraphs. Don't intimidate people with a big wall of text. ✂️

Also, choose simpler words—they tend to be shorter. Plain and conversational language is easier for people to understand.

About 70% of chats are completed via mobile devices

THE CASE FOR SHORTER SURVEYS

The need to be succinct isn't just a rule for chats—it's a great rule of thumb for survey design in general.

According to Consumer Participation in Research, a study from Greenbook, 54% of respondents believe the ideal length for surveys should be less than 10 minutes.[8]

Ray Poynter, a respected thought leader in research, has said that long surveys anything that takes more than 20 minutes to complete—are dead.[9]

One in three respondents in a recent study by the Global Research Business Network said the majority of surveys they get are too long.[10]

BREAKING AWAY FROM STANDARD RESPONSES

With chats, you have the opportunity to completely rethink how you phrase standard response lists to make them more plain language. You can choose an approach that's a complete departure from standard practice, or choose a more subtle deviation.

Here's an example:
Classic:
Very satisfied, Somewhat satisfied, Somewhat dissatisfied, Very dissatisfied

Subtle:
Very satisfied 😃, Satisfied 🙂, Not very satisfied 😐, Not at all satisfied

Different: Loved it 😂, Happy 😃, Room for improvement 😐, Unhappy 😧, Mad 😡

Simple: 👍 or 👎
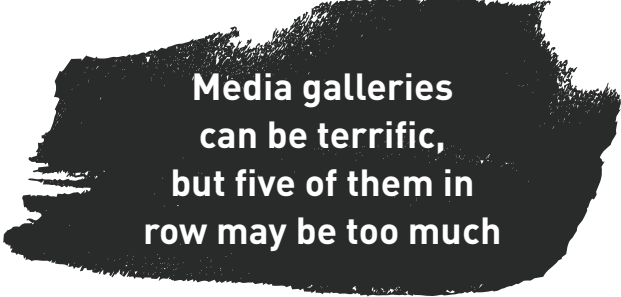
RULE #5:
CHOP OUT
REPETITIONS

Even if a chat is relatively short, it can feel lengthy if your questions are repetitive.

Say you'd like to ask, "have you ever heard of this brand?" and offer a simple "yes" or "no" as responses. This is fine if you're testing one or two brands, but if you ask this exact same question five or six times, it becomes repetitive very quickly. 😴

In real conversations, you'd naturally rephrase your questions to avoid sounding repetitive—you need to do the same in your chats. In the examples above, rather than asking the same question, you can tweak your subsequent questions: "How about X?" or "What about Y"? 🤔

Also, media galleries can be terrific, but five of them in a row may be too much. There's a big difference between a simple battery of yes or no questions, and a series of media galleries. If a respondent has to go through similar questions where images are not central to the exercise, consider using a simpler word-based question to reduce the weight of your chat.

If you still find your chats to be too repetitive, cut out some your questions. Response rates are really high, so you can always reach out in a follow-up chat.

Media galleries can be terrific, but five of them in row may be too much
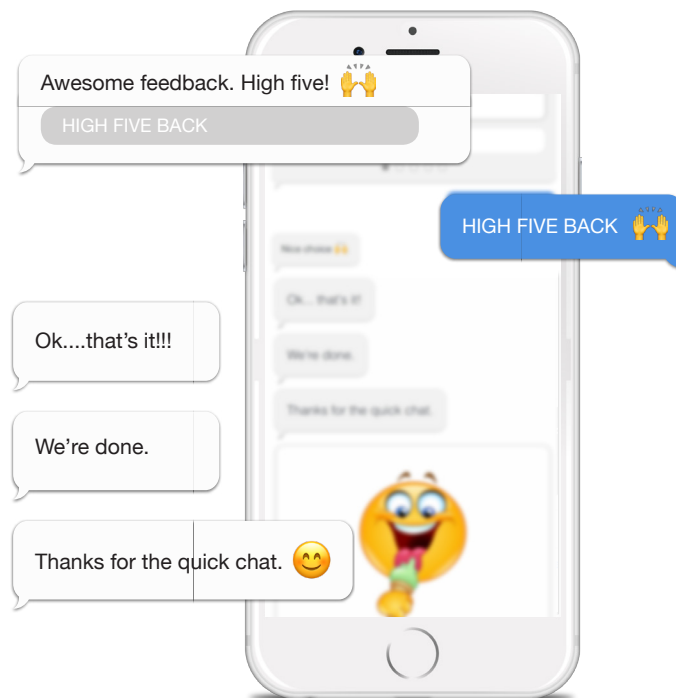
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RULE #6:
RESPOND AND ACKNOWLEDGE

Conversations, by definition, involve a back and forth. When you ask a friend a question and they answer, you acknowledge or react to that response before moving on.

But most surveys aren't designed to mimic this two-way dialogue. Most surveys simply ask questions without acknowledging people's responses.

You can program chats to emulate the same experience people have when they're messaging with friends and family. Thank people with a fun GIF. 🙏 Say "please" with a meme-fied image. Use emojis with text to enhance your copy. 😍 All of these are great ways of giving your chats a personality and making the experience more fun for your respondents!
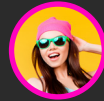
PEOPLE LOVE CHATS! 😍

In a 2018 study, we asked respondents to tell us what they think of chats as a way of answering surveys. The responses we got are overwhelmingly positive.

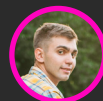**"The emojis made it so much more comfortable to text back and forth."**

"This was the coolest survey I ever did."

"I did like this way of participating in a survey makes you feel like someone is paying attention to you."

"This was a great way to take a survey! I felt like I was just talking to a friend."

"The overall experience was excellent. The fact that it felt more like a conversation than a never-ending multiple-choice test was great."

Rule #7 : Get Your Timing Right

⏰

People tend to answer an email survey when they get to it. Usually that means a day or two, if if they respond at all.

But this isn't true for chats. In the same way people are used to answering texts right away, respondents also tend to answer chats as soon as they get notifications. Capitalize on this behavior by sending your chats when people are already most likely to be looking at their phones.

Of course, most people will have their phones with them at all times, but many will ignore notifications while at work or school. 👷 To maximize response and completion rates, it's important to be strategic with your timing. ⏰

From our experience, the ideal deployment time is just after work: between 5:30 and 6:00 p.m. If you're deploying a chat going to multiple time zones, we recommend targeting 6 p.m ET or 3 p.m. PT. This rule of thumb also applies to reminders.

Of course, for chats targeting live events, your ideal time will depend on the schedule of that event. One of our customers, the Vancouver Canucks 🏒 , send their game-night chats during the second TV time out of the third period. This requires manually deploying the chats (since the exact time of this time out is impossible to predict), but it produces spectacular response rates.

In general, lunch time, breaks in between sessions, and end of day are all good options for chat deployment.
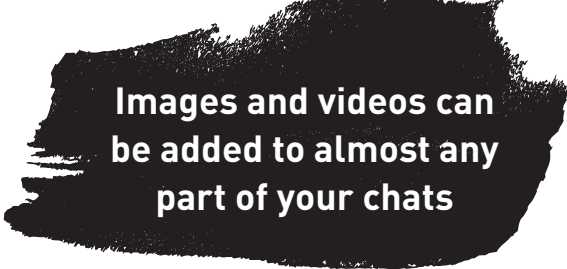
RULE #8:
BE SMART WITH YOUR VISUALS

One of the advantages of chats over traditional online surveys is the ability to use images, videos, and animated GIFs.

These are visual elements people use in their daily conversations with their friends and family. And when used correctly, these can make your chats more fun and engaging to complete.

Images 🖼️ and videos 📺 can be added to almost any part of your chats—your questions, responses and explanations. But don't over do it.

There aren't any hard and fast rules on the right number of images to use per chat, so use your judgment. If it feels like you're overdoing it, you probably are. If you're not sure, get a colleague to test your chats.

Also, consider speed. Having too many images will affect your chat's load time. Choose images with a smaller file size—around 20KB is ideal. We recommend avoiding animated GIFs in the first few questions. Of course, speed isn't an issue if your respondents are using broadband connection—but if you're engaging with people who have lower bandwidth, you need to be more judicious.

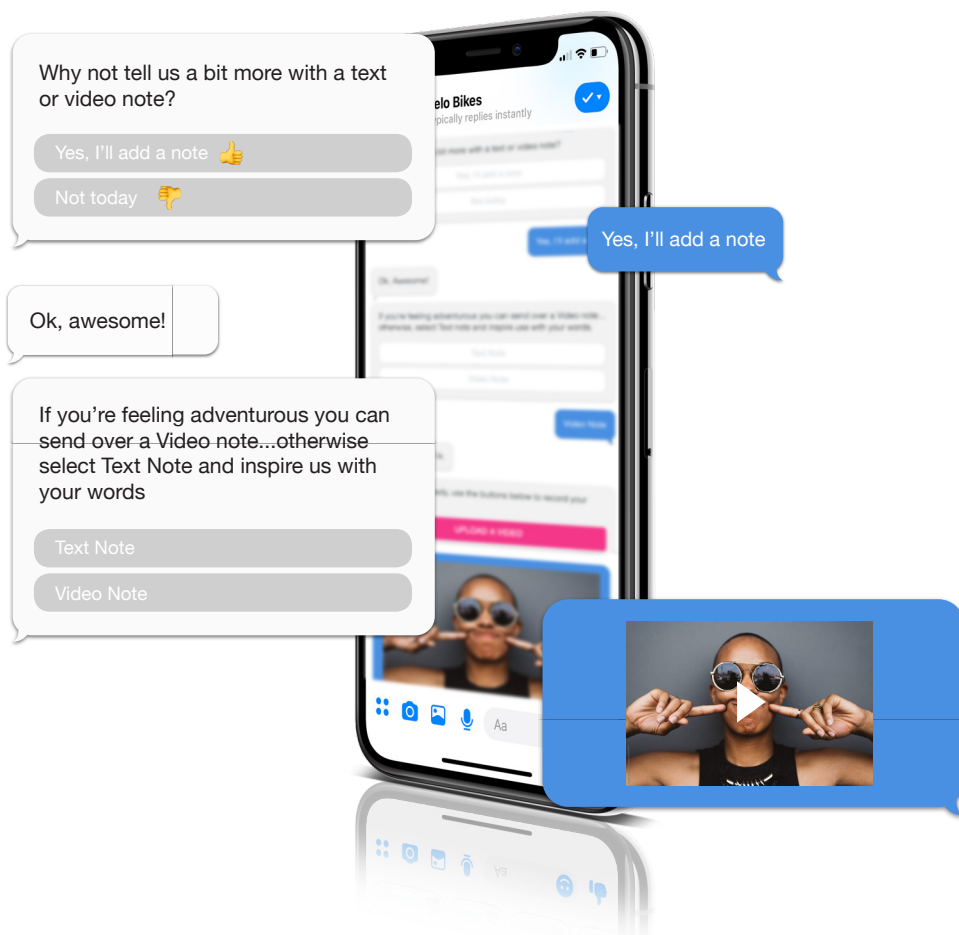**Images and videos can be added to almost any part of your chats**

COLLECTING RICH MEDIA

Chats open new, effective ways of gathering qualitative insights at scale.

Today people already share images and videos with each other through messaging apps. Capitalize on this behavior by giving your respondents an option to use visuals to share their thoughts and feedback.

Photos and short videos not only help humanize your respondents, they also provide rich color and context to your quantitative data.

RULE #9:
USE EMOJIS 😃

In addition to videos and images, the use of emojis can help make your chats more enjoyable to participate in.

The power of emojis lies in the fact that they transcend language barrier. A 😁 and a 😢 can be interpreted by almost any internet or mobile-phone user, regardless of what language they speak.

Emojis can help show empathy to chat respondents in a way that text alone can't. They can emphasize or bring to life your chat's personality 😘 more effectively than just words. When used the right way, emojis can break up a wall of text or add emphasis to important words.
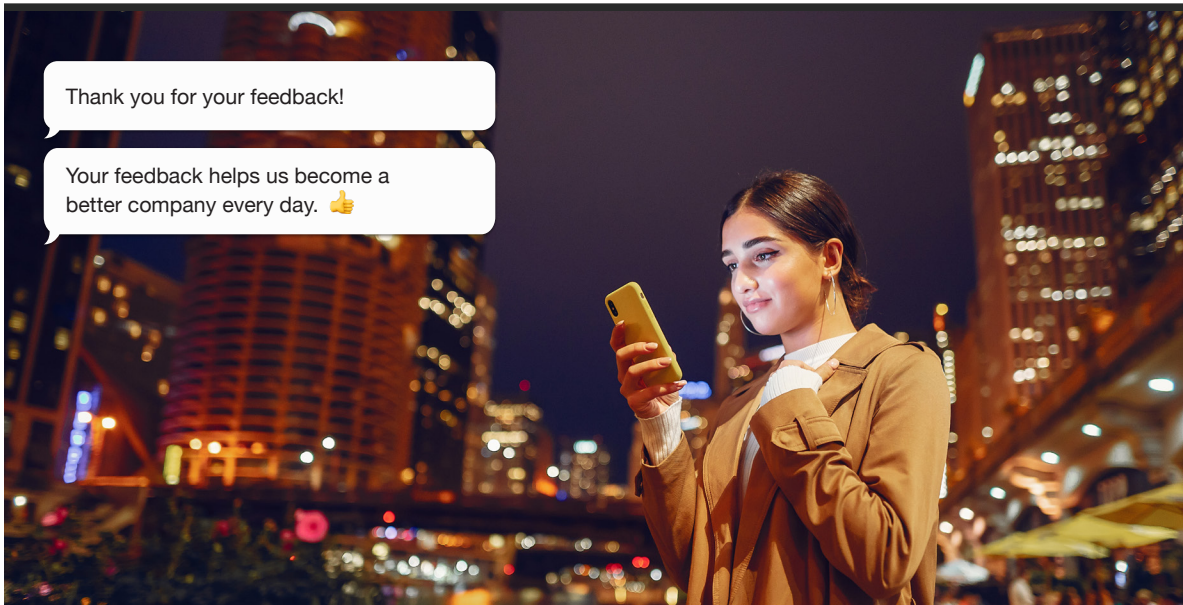
Emojis can also improve your chats' open rates: according to one study, push notifications that include an emoji see an 85% increase in open rates.[11] 😲

There are many ways to creatively use emojis in your chats:
- Include one or two emojis in your push notifications to grab the attention of respondents.

- Add emojis such as 🙏 in your transitional messages in your chats to thank people for their responses

- Put smileys 😁 😁 😁 😁 😁 as additional character elements to single-answer or multiple-answer responses

- Use emojis to replace or add to traditional rating or likert scales

Ensuring the experience is optimized for mobile and feels natural and conversational will help you deliver a great experience. 👍

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Bottom line: Think respondent-first

Chats are a powerful new way of reaching your customers, fans and employees for their feedback. With a majority of people using mobile messaging apps, chats open new opportunities to gather insight in a more fun, seamless and enjoyable way.

But to maximize the potential of this new innovation, you need to step back and prioritize the experience of your respondents. People's expectations from chats are very different from other online survey channels. Ensuring the experience is optimized for mobile and feels natural and conversational will help you deliver a great experience.

JENNIFER REID

Senior Methodologist,
Rival Technologies

Jennifer Reid is the Senior Methodologist at Rival Technologies. A pioneer in online research methodologies, Jennifer started her career at Angus Reid Group in 1998, where she was instrumental in building Canada's first online research panel.

In 2003, Jennifer joined Vision Critical. As the company's Executive Vice President of Corporate Strategy, she helped develop the methodology for Vision Critical's proprietary community offering—an innovation that went on to disrupt the research industry in the next decade.

At Rival, Jennifer is once again helping shape the future of insights by leading the charge in the development of chats and other conversational research technologies.

A proud mother of three, Jennifer has a degree in economics from the University of British Columbia. She sits on the board of the Angus Reid Forum and St. Mark College, an affiliate of UBC.

Julia Morton

Customer Success,
Rival Technologies

Julia Morton leads the customer success practice at Rival Technologies. In this role, she helps insight leaders from Fortune 500 brands adopt and maximize the value of emerging conversational research technologies. From recruitment for mobile agile communities to ongoing research projects, Julia plays a key role in delivering the best possible experience to Rival customers.

In her eight years in the industry, Julia has seen firsthand the decline of traditional survey methods—a massive problem that impacts the respondent experience and the quality of insight and data companies get from customer feedback. Julia recognizes the power of research to help companies make better business decisions and to give customers a seat at the table, and she is excited to help Rival bring a much-needed disruption to the industry.

Prior to joining Rival, Julia held senior roles at Maru/Matchbox and Vision Critical. Julia also has a Journalism degree from Carleton University and began her career in the media industry.

1. https://www.statista.com/statistics/456500/daily-number-of-e-mails-worldwide/

2. https://www.smartinsights.com/email-marketing/email-communications-strategy/statistics-sources-for-email-marketing/

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7. https://qz.com/1409350/a-new-law-means-californias-bots-have-to-disclose-theyre-not-human/

8. https://greenbookblog.org/2017/04/25/why-most-respondents-dont-like-participating-in-research-and-what-we-can-do-about-it/

9. https://www.visioncritical.com/the-long-survey-is-dead/

10. https://grbnnews.com/trust-report-card-for-the-mr-industry-we-must-try-harder/

11. https://blog.pushengage.com/12-proven-advantages-of-using-emojis-in-push-notifications/

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