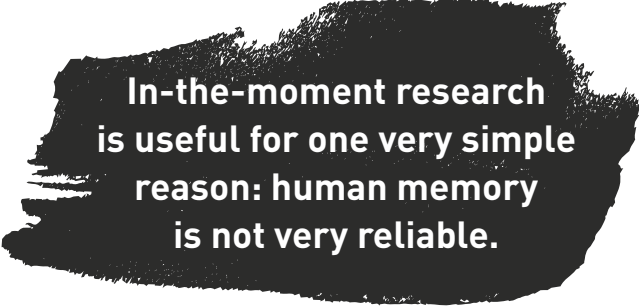# STOP RELYING ON RECALL

RIVAL

How to get in-the-moment feedback by engaging your customers in real-time

WRITTEN BY JENNIFER REID, SENIOR METHODOLOGIST, AND JULIA MORTON, DIRECTOR OF CUSTOMER SUCCESS, RIVAL TECHNOLOGIES

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Market research is most powerful when it reveals the authentic thoughts and feelings of consumers. If you can get people's unfiltered feedback, you're more likely to uncover insights that will improve your relationship with your customers and ultimately drive positive business outcomes.

In-the-moment research is an effective ways of capturing people's authentic opinions, attitudes and preferences. It's an approach that puts you right in the moment of the experience — and delivers more accurate insights in the process.

In-the-moment research is useful for one very simple reason: human memory is not very reliable.

RIVAL

THE PROBLEM WITH RECALL-BASED METHODS

One common criticism of survey research is that it relies heavily on recall. Because people have to remember their experiences, they are more likely to rationalize their responses or misremember details[1], and less likely to share authentic and honest feedback. Concern for this "recall bias" is not new in market research — it has been part of the discourse in our practice for decades.

Recent neuroscience advancements aim to uncover the automatic, fast and unconscious thoughts of respondents (which many in our industry refer to as "System 1 decision making"). 🧠 The goal is to reduce the need to ask consumers what they did, thought or felt, and in the process, capture their true feelings.

While these developments can certainly uncover interesting insights, they don't sufficiently replace having real conversations with customers. For many business questions, interfering can only take you so far. At some point, you have to ask customers directly to get a clear and accurate understanding of their attitudes and opinions.

By letting companies talk to a significant number of people and in a structured format, surveys are still an effective way of listening to customers. But to maximize the business value of surveys, researchers need to minimize recall bias as much as possible. The key is to re-imagine this classic market research tool and leverage new technologies and fresh thinking to reduce the need for recall.

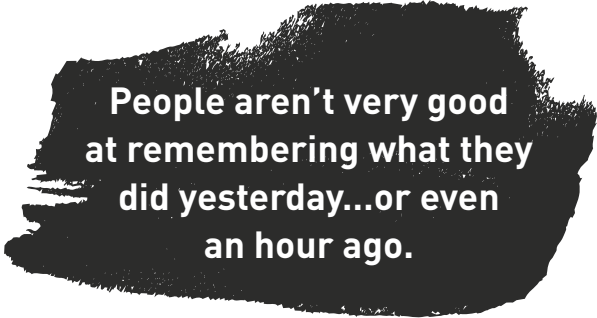1. https://www.ted.com/talks/elizabeth_loftus_the_fiction_of_memory

WHY ENGAGE WITH CUSTOMERS IN THE MOMENT?

In-the-moment research is useful for one very simple reason: human memory is not very reliable. Most people aren't very good at remembering what they did yesterday... or even an hour ago. The closer you can get to the moment of the experience, the more accurate and detailed your insights will be.

When you look back at an event, you can broadly remember whether you loved it 💖or hated it.💔 But what drives satisfaction are the details. These smaller elements of the experience are harder to capture in a post-event survey because people simply don't remember what happened.

Our experience working with clients from a wide variety of industries shows that in-the-moment research improves people's feelings toward the company. Since they are being asked for their feedback in real-time, participants feel like special insiders and ambassadors who get to share their input directly with the brand. They're still very willing to provide constructive feedback, but they also appreciate the opportunity to influence decision-making in the company.

Engaging people in-the-moment can be an effective way of improving the respondent experience and boosting participation rates. People are more likely to respond if they are answering questions about an experience that is currently happening or that happened.

> **People aren't very good at remembering what they did yesterday...or even an hour ago.**

Recall-based research	In-the-moment research
✗ Respondents answer questions a few days, or even weeks after their experience	✓ Respondents answer questions while they are in the midst of the experience
✗ Relies on email or other slow, traditional methods	✓ Leverages "always on" channels like SMS and messaging apps and other platforms people use all the time
✗ Done via one long, clunky survey	✓ Done in a series of short and fun chats
✗ Response rate of 20%...at most!	✓ Typical response rates of 50% - 70% 😍
✗ Open-ended feedback is only in text format	✓ Opens opportunities to collect videos 📹 and photos 📸 to capture richer insights

recently. Real-time participation eases the effort of racking your brain because the details are still fresh in your mind — it's a more natural and easier way of providing feedback.

Another big benefit of in-the-moment research is speed. This type of research yields faster results, allowing research teams to be more agile and capture insights quicker.

The closer you can get to the moment of the experience, the more accurate and detailed your insights will be.

RIVAL

WHEN IS IT APPROPRIATE TO ENGAGE RESPONDENTS IN THE MOMENT? 🤔

In-the-moment research has broad applications, including:

- **Live events:** Get an accurate read on people's experience at sporting events, trade shows and other live events. Measure the ROI of sponsorships and experiential marketing efforts.

- **Broadcasts:** Ask for feedback before, during or just after a live TV show. Get real-time feedback on commercials currently in the market, or capture insights that will help improve programming.

- **Transactional:** Understand shopper path-to-purchase by sending people on mission-based activities and asking them to share their feedback while in store.

Imagine being able to present audience feedback about a new TV show at the same time as the Nielsen ratings. With in-the-moment research, this is easy to accomplish.

In sum, by eliminating the lag time between the activity you wish to explore and the sharing of feedback, in-the-moment research addresses the big challenges posed by recall-based approaches.

In-the-moment research has broad applications

HOW TO MAXIMIZE THE VALUE OF IN-THE-MOMENT RESEARCH

Many long-standing practices that work for recall-based methods aren't necessarily useful for in-the-moment research. Since getting real-time feedback leverages mobile devices, it's important to re-examine your approach to survey research when engaging with people this way.

Based on our decades of experience working with big brands on all types of research, we recommend the following tips for more effective in-the-moment research.
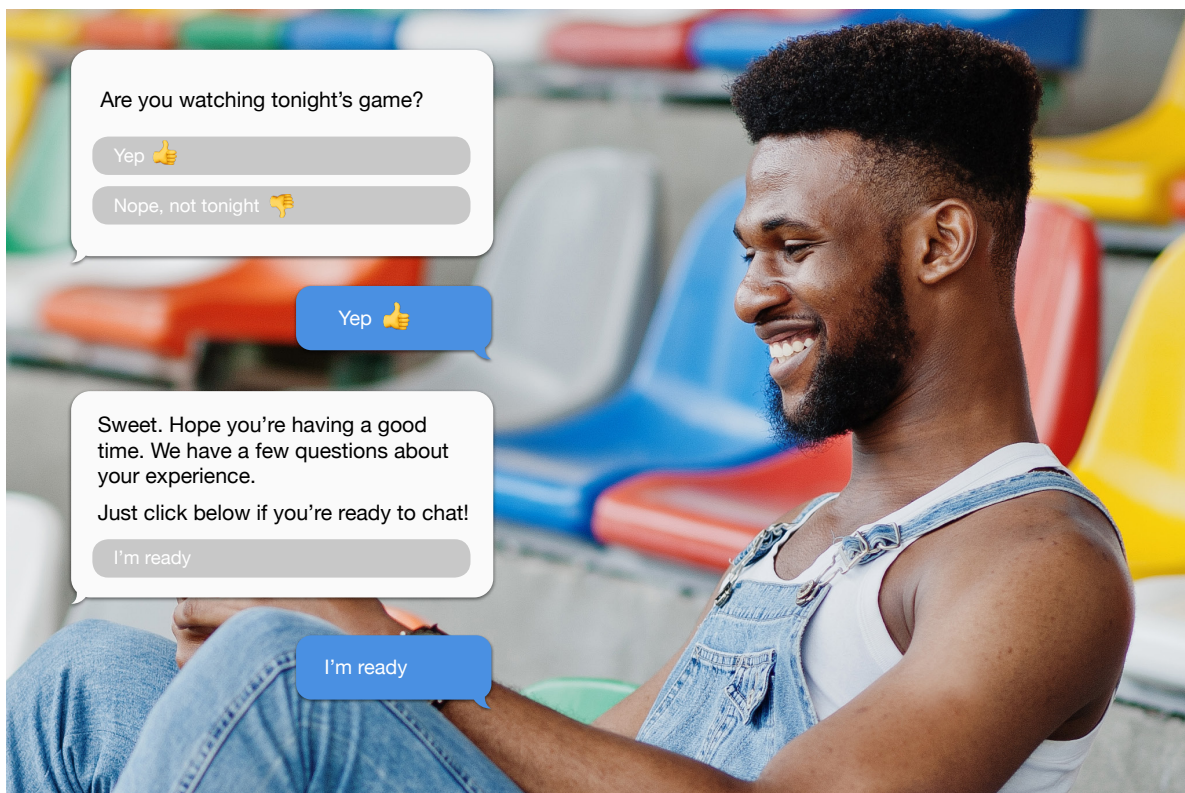
OPT PEOPLE IN

👍

The first step to doing in-the-moment research effectively is to create a community of people ready to chat to you. Invite your attendees, customers or fans in advance and get them opted-in.

During trade shows or live sporting events, for instance, many things will be competing for people's attention, so in-person recruitment can be challenging. It's more effective to recruit people in advance.

A big advantage of getting people to opt-in is that it allows you to send reminders. For TV shows, for example, you can send a notification a few hours before the show airs to remind people that you'll be asking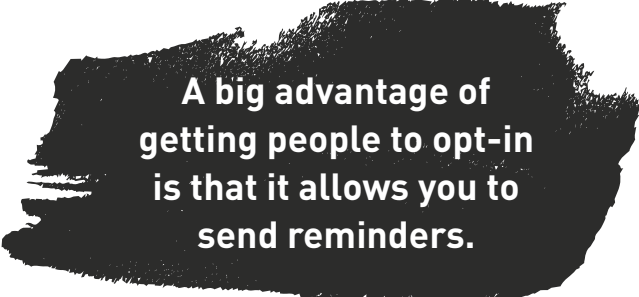 them questions about the broadcast soon. Most people appreciate this pre-warning and it's a best practice that helps boost response rates.

Time it right. For live events and conferences, it's not a great idea to start recruitment a month early. 🙅‍♀️ Depending on the nature of your research, you might need to do recruitment a few days or a week in advance. Same with TV shows: you don't want to recruit people months in advance as they may not know yet if they'll be watching.

Regardless of the timeframe, be upfront with respondents about when the research is taking place and what's expected from them.

> **A big advantage of getting people to opt-in is that it allows you to send reminders.**

BE MOBILE FIRST
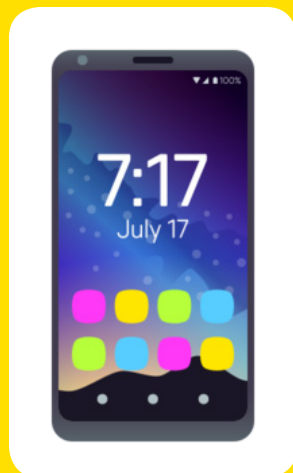
When it comes to in-the-moment research, it's not enough to be mobile-friendly — everything about the respondent experience needs to be mobile-first. Because mobile devices allow you to notify people in real time, they are able to share their feedback instantly.

Being mobile-first allows you to take advantage of the fact that people bring their phones everywhere. It's not uncommon for people to have their mobile device in their hands while watching a TV show, attending a sports game or lining up for grocery checkout.

At Rival, our approach to being mobile-first is to use chats — conversational surveys deployed via SMS, Facebook Messenger and other messaging apps. Unlike traditional surveys, chats do not rely on email for distribution; rather, follow-up activities are sent via mobile notifications. More importantly, chats mirror how people talk to each other on mobile messaging platforms. 👍Chats are shorter, more fun and more conversational 😊 than the typical online survey.

Chats take advantage of mobile notifications, so responses are more immediate. And because chats are mobile-first, the experience is more like a conversation with a friend or a family member than an impersonal survey from a faceless brand.

Chats mirror how people talk to each other on mobile messaging platforms

THE POWER OF MOBILE NOTIFICATIONS

Mobile research reveals a wealth of new opportunities to engage people in real time. This is partly due to the power of notifications.

Because they bring their phones everywhere and are constantly checking notifications, consumers tend to take action immediately.

95%
of texts are read within 3 minutes of being sent[2]

Push notification click rates are highest
during non-working hours, according to a 2018 study[3]

70%
of consumers feel that push notifications are useful[4]

Good morning!
It's Coachella Day 2! We hope you got a good night's sleep because it's going to be a MASSIVE day!
Is it a good time for us to chat?

Yes, let's do it!

Later please!

Yes, let's do it!

Sweet! Let's go

2. https://www.viber.com/blog/2017-11-06/text-message-response-times/
3. https://www.accengage.com/press-release-accengage-releases-the-push-notification-benchmark-2018/
4. https://blog.e-goi.com/infographic-push-notification/

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PLAN AHEAD BUT BE FLEXIBLE

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Expect the unexpected. While it's important to know what you want to ask in advance, you also need to be flexible and ready for surprises.

A recent Rival study involving the Academy Awards illustrates the importance of being agile. The 2019 broadcast of this annual show was unique in that it had no host and many of the categories included racially diverse nominees. We wanted to find out how viewers felt about these changes and learn about the audience's general attitudes toward the broadcast.

Once people had been recruited, we planned our Oscars night chat. While there were themes we wanted to explore — having no hosts; more ethnic and gender representation; reactions to winners and so on — we also knew from experience that surprises 😲 were likely to pop up during the broadcast.

And pop up they did: The show had more musical performances than usual (partly because it lacked a host) and featured a greater number of memorable acceptance speeches than usual. We adjusted our chat just before deployment to reflect these changes and received interesting feedback as a result. The insights we gained from this chat turned out to be relevent to marketers and we shared our takeaways through a pair of thought leadership articles.

As this example shows, while it's smart to have a solid plan, being agile and flexible can help you capture feedback that's timely, more relevant, and in turn, more useful.

CONSIDER YOUR TIMING

To maximize the value of mobile notifications for in-the-moment research, you need to be strategic with your timing.

Consider sending a pre-warning to remind people you'll be sending a chat soon. For instance, if you're doing research on an upcoming TV show, you could send a reminder a day before and confirm with respondents if they're still planning on watching.

The right timing of your chats depends on your audience, your goal and the event. Some general guidelines:

- For sporting events, send your chats during one of the later intermissions. We find this is when people get antsy and start checking their phones. Don't send a chat right after the home team has scored an important goal — people will be busy celebrating and won't be looking at their phones. Instead, send a chat during a natural lull or downtime in the action.

- For broadcasts, deploying your chats during commercial breaks works best.

- For transactions, time the notification so it's as close to the experience as possible. If, for instance, you're doing a study on consumer attitudes towards happy hour beverages, your first chat should ask people if they're planning to visit a bar or a pub on a certain day, like Friday. You can then send a follow-up chat on that specified day (only to those who indicated they are going) to ask them about their experience as it's happening.

KEEP IT SHORT AND EASY

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Long surveys are always a bad idea; however survey length is an even bigger deal for in-the-moment research.

Keeping your chats concise and focused will increase the chances of people completing them and providing richer, more accurate information. Another benefit: short chats will increase the likelihood that people will participate in the future. If they can see that you respect their time, they'll be more likely to answer your chats in the future.

So what is "short"? 🤔

In general, we recommend chats to be around five minutes. Think about your own habits when texting or using messaging platforms: It's unlikely that you spend more than a few minutes at a time in these apps. You might come back to your conversations numerous times a day, but you do so in short bursts. If you emulate this behavior in your chat surveys, you'll see better response rates.

Remember that you can always engage people again, since they're already subscribed to future chats. Really, there isn't a good reason to ask every single question you can think of in a single chat.

Shorter chats keep people's attention, helping improve your completion rates as well as the quality of your insights.

The right timing of your chats depends on your audience, your goal and the event

CASE STUDY

**HOW THE VANCOUVER CANUCKS GATHER AND USE
REAL-TIME INSIGHTS**

The challenge:

The Vancouver Canucks wanted to better understand the fan experience and the factors that convert people into season ticket holders. The NHL team was interested in getting real-time, in-stadium feedback during games rather than relying on fans' recollection of their experience a few days after. While the company had an email database of season ticket-holders, it lacked an online panel that could be tapped to engage a wider range of fans in a scalable and agile way.

The solution:

Working with Rival Technologies, the Canucks used chat surveys during the 2017-2018 season to recruit more than 5,000 fans through Facebook, Twitter and Instagram in just a matter of weeks. Insights from this community help the organization better understand all the different elements of the fan experience and improve game-night

entertainment. Response rates are typically in the 50% - 70% range, and the company gets hundreds of responses within minutes of sending a chat. For the 2018-2019 season, the Canucks used chats to measure the impact of different theme nights. Data from these chats revealed fan's awareness of these special events as well as what they liked and disliked about them. Chats also help uncover the drivers that lead to ticket purchase.

By broadcasting chats during intermissions, the Canucks get real-time feedback on in-stadium campaigns running on that same night. This valuable insight not only helps measure sponsor recall, it also provides both the Canucks and its sponsors with actionable feedback on creating campaigns that enhance the fan experience and boost awareness for partners.

> **"Before using Rival's technology, we didn't have an easy way of engaging a significant number of our fans in a timely manner. Now we have a community that can give us rich feedback quickly and easily. Our fans love the chats they get from Rival. They are fun, short and very timely. Most importantly, the chats capture and reflect the Canucks brand personality in an authentic and effective way. The output from the chats provides us with actionable insights to improve fan experience at Rogers Arena."**
>
> -Brad Pennefather, VP, Membership and Business Intelligence

BE SMART WITH YOUR VISUALS 📸

Animated GIFs, emojis 😁 and multimedia galleries are great tools for making your chats and surveys more fun and interesting to complete. But don't go overboard.
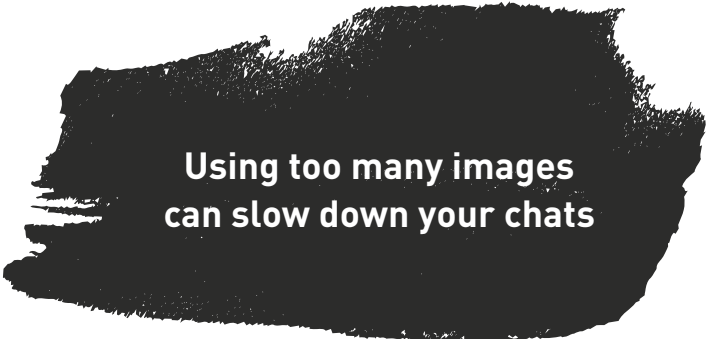
Using too many images can slow down your chats and frustrate respondents. During live events in particular, people's network connections might be slower than usual because they're in a large crowd.

If you're going to use images, be mindful of file sizes. There's no need to use super high-res videos and images, as mobile devices are more forgiving of files with lower resolution.

Being smart with your visuals also applies to the type of qualitative feedback you're seeking.

While we are big fans of letting people submit videos for open-ended questions, this approach may not be appropriate at live sporting events, for instance, where there's too much noise or where people might have a hard time submitting a larger file.

Consider where people will be doing your chats, and tweak your approach accordingly.

**Using too many images can slow down your chats**

OFFER THE RIGHT INCENTIVES

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Most people will participate in research because they find the experience intrinsically rewarding. However, the right incentives can help sweeten the deal. Small but thoughtful prizes can help improve recruitment and boost response and subscription rates.

Relevance is key to choosing the right incentives. For live sporting events, fans will appreciate the occasional jersey giveaway. For conferences, offering unique swag items works well.

If you're providing incentives, mention them as early as possible. Many Rival clients include information about prizes in their recruitment chat to encourage people to subscribe.
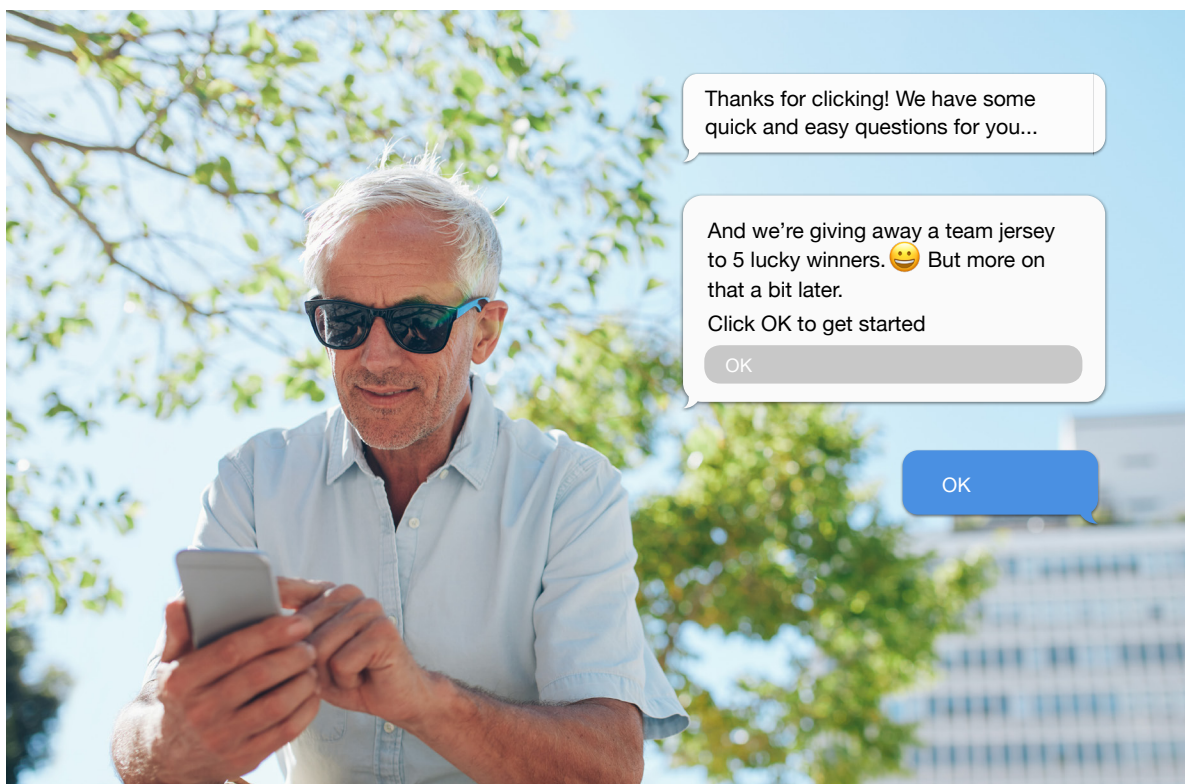
Conclusion

By relying less on recall you have the opportunity to deliver the best experience to respondents and gather richer insights faster than ever before. In-the-moment research is an important tool that can help you gather a significant amount of feedback in the shortest amount of time possible. It is an approach that can help your team become more agile. However, for this approach to really work for you, it's important to examine widely accepted practices and re-imagine them for mobile-first consumers.

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

Director of 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 nearly a decade 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.

RETHINK YOUR RESEARCH

Book a demo with us to learn how chat, voice and video technology can help you capture rich, real-time insights

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CONTACT US AT RIVALTECH.COM/DEMO