



THE FUTURE OF FEEDBACK

CONSUMER INTEREST
IN NEW WAYS OF
DOING RESEARCH

maru/matchbox

"SIRI: READ ME THIS WHITEPAPER"

At its heart, market research is all about communication. We ask questions and collect answers.

But do the people we get answers from represent reality? Does the way we collect information reflect the way people communicate today? And what about tomorrow?

In the not so distant past, many cultures around the world used log drums to

communicate messages over multiple miles. In North America, indigenous people on the prairies used smoke signals, fires and signal mirrors.

But technology changed all that. Suddenly we had people tapping Morse code over telegraph lines. And then we had telephones, and then fax machines and then email and texts and IM. And who knows what's next...



FROM FACE TO FACE TO...

When George Gallup pioneered market research, all interviews were done face to face through door to door interviewing. Then we moved to telephone interviewing, because people didn't want interviewers knocking at their door, asking for a half hour of their time. Back then, they were willing to answer the phone. That, however, was when phones were plugged into the wall.

Then the internet happened, and researchers followed the world online. People then had to learn to design surveys for desktops, because that's how everyone was accessing the World Wide Web. Then they had to change to mobile-friendly survey design because a majority of web traffic is now [mobile](#).

But researchers have not raced to keep up with the changing ways we communicate. Research is, by its nature, a conservative industry. We tend to lag trends, rather

than lead them. Many companies had to be dragged, kicking and screaming, into moving from telephone to online.

There are still surveys that are done that are not mobile enabled, let alone mobile friendly. This is despite the fact that at least 30% of general population surveys are done on mobile phones or tablets. And that number can be considerably higher, depending on who you are targeting. Interested in millennials? If your survey is not mobile enabled, you are getting a skewed sample.

People do surveys the way they want, when they want. They will not switch devices for you. You need to meet them where they are and communicate with them the way they communicate. That means we need to not only keep up with the times; we must peer into the future so that we are ready when change rushes upon us.



FACING THE FUTURE

The faster you drive, the more important it is to look farther ahead—because everything comes at you so quickly. Changes in technology are coming fast and will only get faster.

As an industry, we need to work together to adapt and adopt. Because if the insights industry does not keep up with how people communicate, we all suffer.

Keeping our eye on the horizon, we've been researching interest in surveying using a host of different methods. In this paper, we summarize people's reactions to a variety of communication options: virtual assistants; video open ends; voice to text; app-based research and AI-driven interviewing. We're looking out for the future of feedback.



VIRTUAL ASSISTANTS

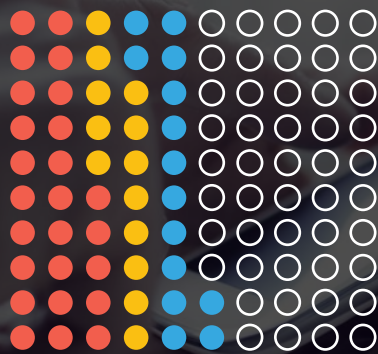
Virtual assistants are taking off in popularity. "Virtual digital assistants to overtake world population by 2021" declared one [forecast](#). They don't mean there will be a virtual assistant uprising; they mean "the native digital assistant installed base is set to exceed 7.5 billion active devices by 2021, which is more than the world population according to the U.S. Census Bureau on May 1, 2017."

We asked people about virtual assistants like Apple's Siri and Amazon's Alexa. We wanted to know who has one, whether they used it, and whether they would try

surveys using it. While a majority have a virtual assistant, not all of them have ever used it, but one in four were willing to try surveys.

To understand what the drivers and barriers to interest are, we asked people to pick words they felt described the idea of doing a survey using a virtual assistant. Those who were interested in trying it picked words like "efficient," "easy" and "cool," while those who were not interested tended to select words like "awkward," "confusing" and "creepy."

"Virtual digital assistants to overtake world population by 2021"



52% have virtual assistant

38% have used it

25% would try surveys on it

IT'S A MILLENNIAL THING

Millennials were, however, much more likely to have virtual assistants, to have used them, and to be open to doing surveys using a virtual assistant. People who have grown up with technology as part of their life are, not surprisingly, much more comfortable with emerging technologies.

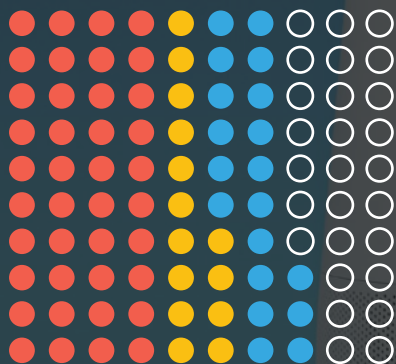
As we look at the reactions to all these possible communication technologies, the story is the same: millennials are much more likely to embrace them; those 55+ are much less likely to welcome them, and those 35-54 are

somewhere in the middle. It is such a predictable pattern that we typically don't report on it in subsequent sections. But we know that the pattern is there: younger people are ready to move on to new ways of communicating, which will change how we do research.

Our conclusion:

It is important to keep an eye on virtual assistants as a way of conducting surveys, especially since virtual assistants might soon outnumber humans.

“Younger people are ready to move on to new ways of communicating”



73% have virtual assistant

54% have used it

40% would try surveys on it

VOICE TO TEXT

Google reported that 20% of all searches are now done by [voice](#). They also found that people are using a more [natural](#) language in their search terms, than when they type in search terms. This has potentially important implications for how we do research. Is voice to text on a smartphone the new mobile interface?

To find out, we ran an experiment where we asked people with smartphones with voice to text capabilities if they would answer an open-ended question using the voice to text function. We wondered if people might prefer to do that and whether we might get richer or qualitatively different answers.

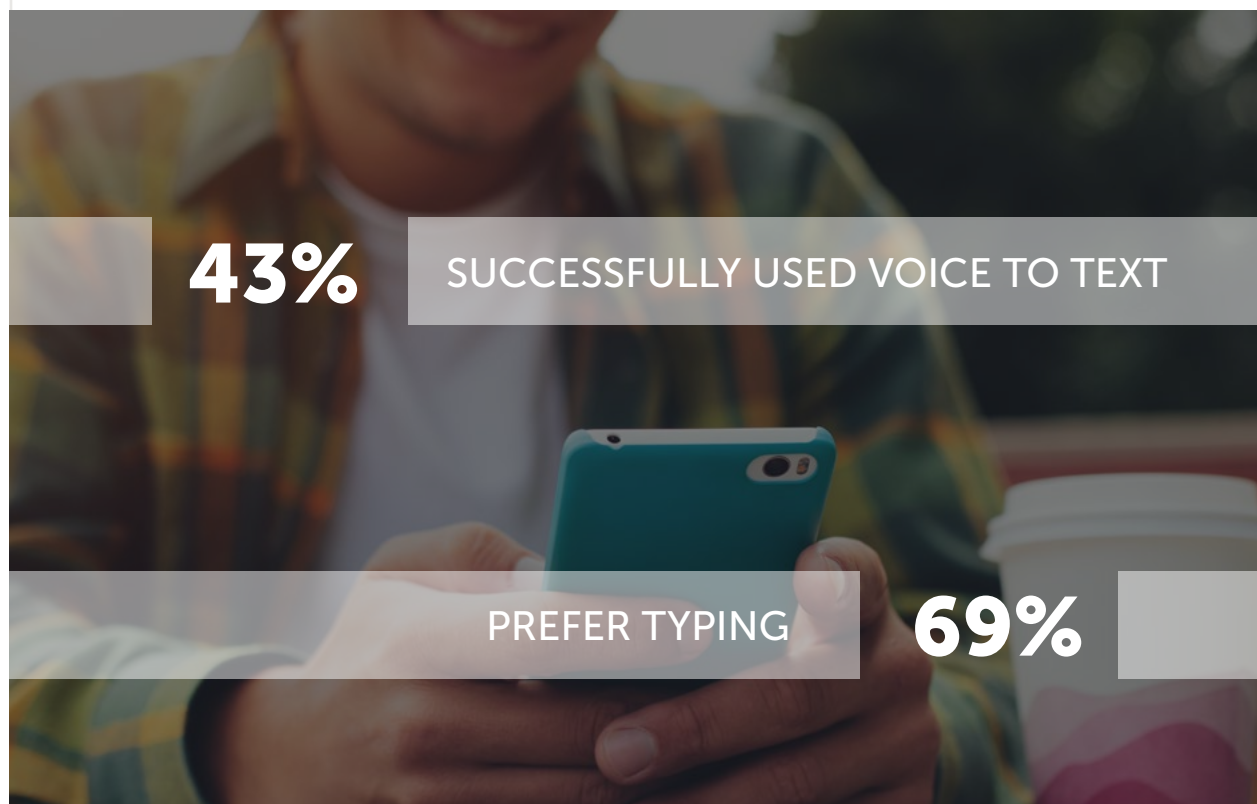
We found that most people did not successfully use the voice to text

function to answer our question. We also discovered that most people who did successfully use voice to text would prefer to type their answer rather than use voice to text. This suggests that voice to text is something only a subset of people are currently interested in.

Disappointingly, we also found that there were no differences between voice and text in the number of words used in the answer, nor were the verbal answers qualitatively any richer.

Our conclusion:

Using voice to text on a smartphone is not yet mainstream, but the increasing use of virtual assistants might change that. This is a methodology we'll continue to monitor.



GIVING FEEDBACK BY VIDEO

We find video open-ended questions to be a great addition to many research exercises. There is nothing like being able to bring the voice of the customer into the boardroom. But we know that not everyone is:

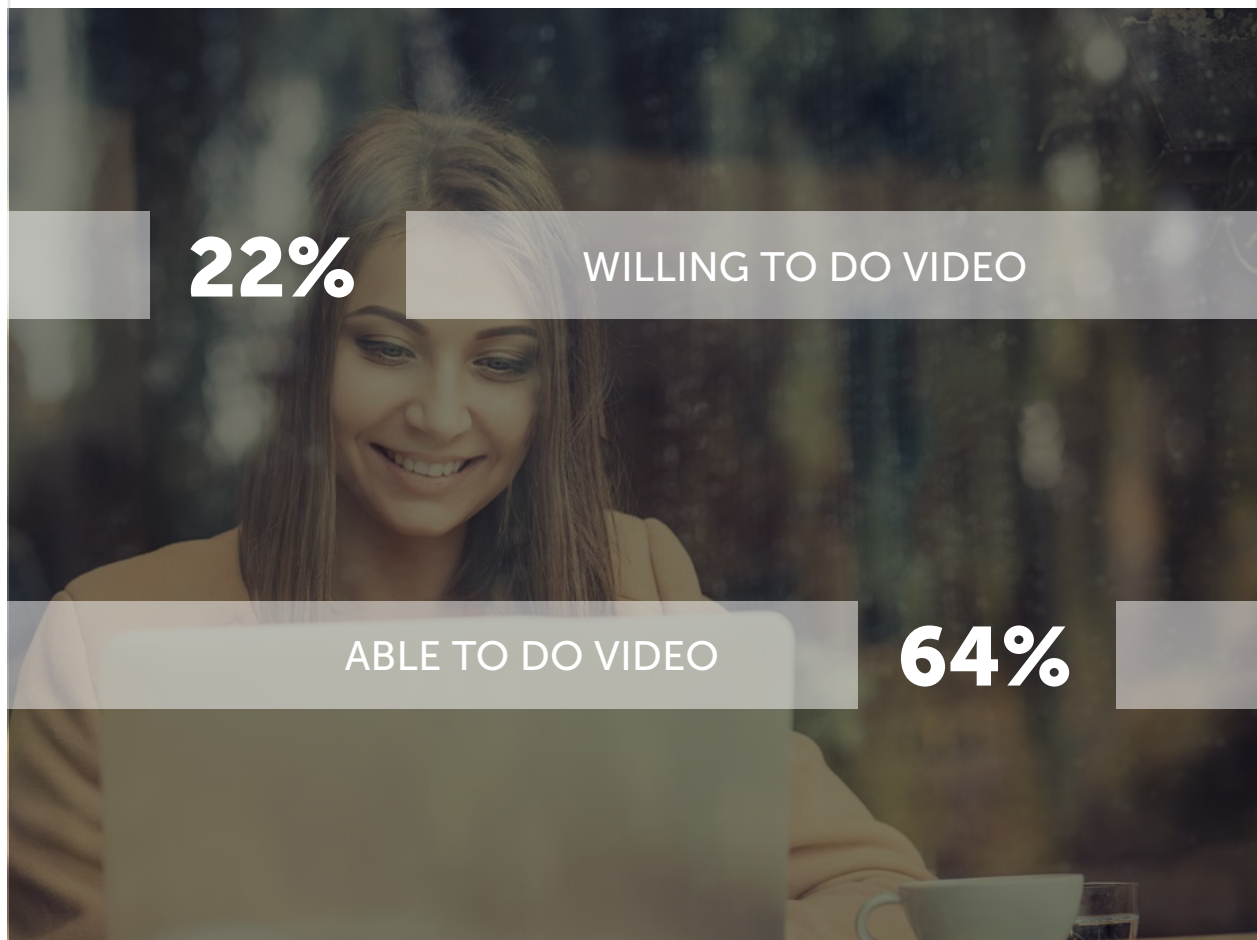
- a) equipped to do it;
- b) interested in being on camera;
- c) able to figure out how to click the right button to make it work.

In a recent study we asked people if they would like to answer an open-ended

question using a webcam or their phone. We even offered them an additional incentive. We found that one in four were willing to do it and, that while most of the willing could make it work, a third of them could not.

Our conclusion:

Video interviews are great, but they should be used with the knowledge that the sample may not be completely representative.



APP-BASED SURVEYS

People spend enormous amounts of time on apps. Research suggests that of the [5 hours](#) a day people spend on mobile devices, 92% is spent on apps and just 8% is spent in a browser. Given this, it makes sense that companies have proposed that apps are the future of survey research.

But it's tough to be an app. Not only are there millions to compete with, the few that get downloaded are typically abandoned within days. Fully [95%](#) are deleted within a few months.

We looked at how asking people to download an app would affect people's willingness to participate in an insights community. We asked a sample of American investors if they were interested in joining an insight community that was focused on investing. One in five (21%) said yes.

When we asked if they would join one that involved having an app, the number willing to join shrank by a third. We then asked if they would do surveys through the app, and the number decreased dramatically, ending up being just one-quarter of the group originally willing to join the community.

When we further asked if they were willing to keep their app in a place on their phone that was "front and center"—and therefore something they would pay attention to—interest evaporated down to a paltry 3%. That is just one-seventh of the original number of people who said they would join the community. That makes recruitment expensive. But the real question is who has agreed to join? Are they the people we want?

Those who agreed to join, download and use the app were very different from the total population of people we wanted to join our community. They were more likely to be: younger; male; have kids at home; be employed full-time; and, Hispanic. This is a very serious problem when we want our community to be representative of our target population.

To learn more, read our whitepaper [Survey Apps and Market Research – do they work?](#)

Our conclusion:

An app is a community killer. Stay clear.



- **21%** are willing to join a community
- **14%** are willing to join a community that requires a mobile app
- **5.4%** are willing to join a community that requires an app and will use the app
- **2.5%** willing to join a community with an app will use the app and will keep it front and centre on their device

TEXT INVITES

If I want to know if my children will be home for dinner, I text them. If I want to reach out to my father-in-law, I email him. Why? Because that is how they communicate.

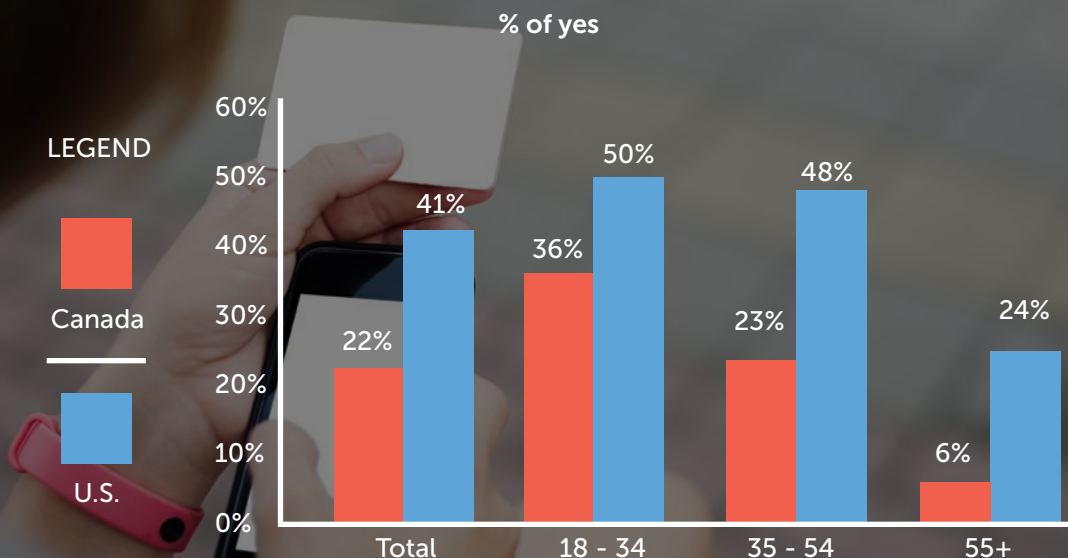
Right now, most community members are invited to complete surveys through emails, but has that become an antiquated way of communicating? To understand this, we ran a question on [Angus Reid Forum](#) (ARF) and [Springboard America](#) (SBA) omnibus surveys. It read: "We currently send you invitations to surveys by email. It is also possible to send an invitation to mobile phones by text message. Would you be willing to receive text message invitations to surveys, on your mobile phone?"

The question was asked of the 86% of ARF and 93% of SBA community members who have mobile phones. As the chart below shows, email is not dead yet, but text messaging is definitely important. Interest in receiving text message invites to surveys is notably higher in the U.S. and amongst millennials.

Our conclusion:

Text messaging is an important way to invite people to surveys. This necessitates changes to how people are recruited, and what they agree to when they join a community.

"Would you be willing to receive text message invitations to surveys, on your mobile phone?"



ARTIFICIAL INTELLIGENCE (AI)

The fact that AI-powered virtual assistants allow you to have interactive conversations raises the tantalizing possibility that chatbots could conduct basic qualitative research. That might be a game changer, so we asked people about it. We said to respondents “Artificial intelligence (AI) is becoming part of many aspects of society and business. We’re interested in your thoughts on its possible role in surveys like this.”

“Advances in artificial intelligence are making it possible for there to be a virtual interviewer who asks questions based on your answers. For example, it might ask you “what is your favorite fruit?” If you answer “bananas,” the virtual interviewer might follow up by asking “what is it about bananas that you like?” If you answer, “I like that bananas have lots of potassium,” the virtual interviewer might ask “What is it that you like about potassium?”

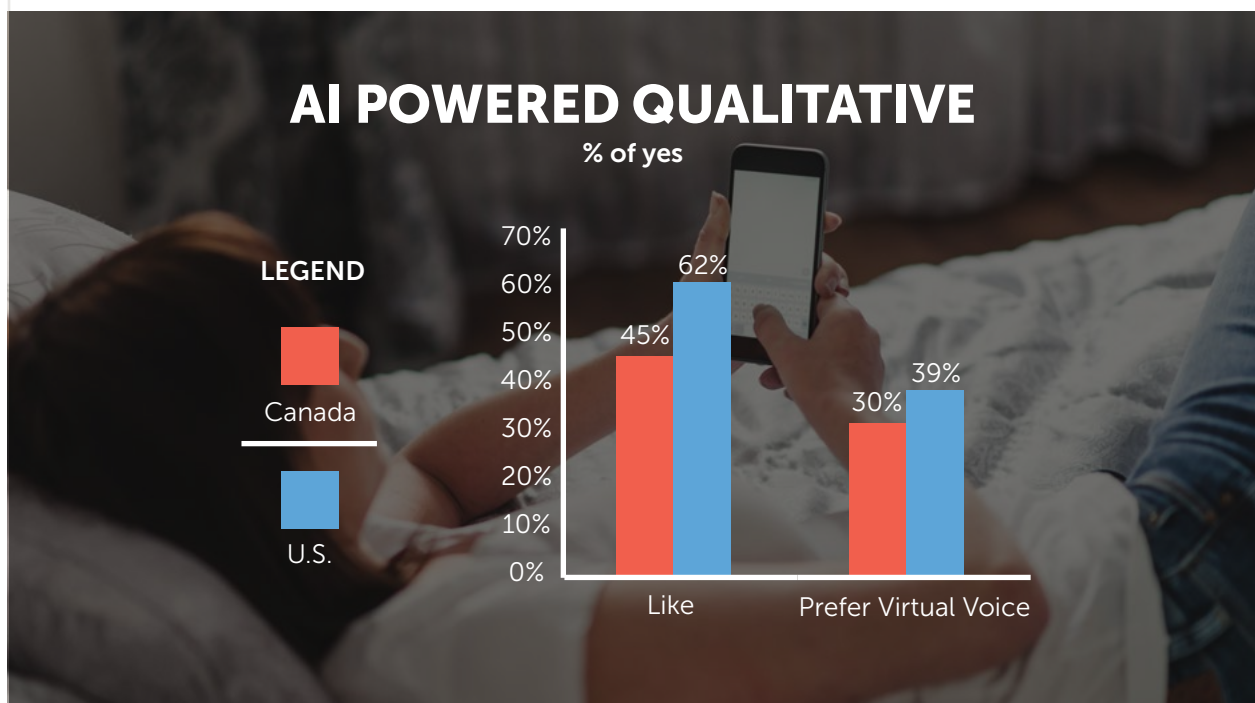
“If a virtual interviewer could be a part of a survey like this, would that be something you’d like or something you’d dislike?”

We also asked: “If there was a virtual interviewer, would you prefer that it asks you questions out loud, with a virtual voice, or ask you the questions as text?”

Overall, the idea of questioning by a chatbot is pretty popular. But here—like with texting—we found a significant difference between Canadians and Americans. In the U.S. they were notably more open to chatbots, and more interested in being interviewed by a virtual voice.

Our conclusion:

Many people—especially millennials—are open to AI-powered qualitative. This seems very likely to be part of the future of feedback.



THE FUTURE WILL BE FRAGMENTED

There is significant consumer interest in new ways of doing research. When we look at the younger generations, in particular, we can see that change in how we collect data is inevitable, and likely coming sooner than we might think, or want.

There will be an ongoing fragmentation of the way people respond to surveys. Today we deal with differences between how questions render on desktops, tablets and mobile. Tomorrow we

will have to be ready to adapt to the demands of many different interfaces.

Imagine what that will mean for your study design when 20% of people are answering your survey through a virtual assistant, 40% are on a smartphone, 15% are on a tablet and the rest are on a device that hasn't even been invented yet. We will have to design our studies in such a way that they can be answered on any and all of these devices.

“Tomorrow we will have to be ready to adapt to the demands of many different interfaces”

DEVICE AGNOSTIC DESIGN

Device agnostic design will mean we need to rethink the way we ask questions. Giant grids won't work anymore. The questions we ask will have to work both on screen and when read aloud. People will have to be able to remember response categories, so that they can call out their answer. That will put an end to long lists, and wordy multipoint scales.

While we can't see all the changes that will be required, we can at least know that

change is coming—and that being ready to adapt to voice responses is likely to happen soon.

When we design with a multitude of devices in mind, it will be essential to ask questions in such a way as to get consistent answers across devices. That will require careful testing and a willingness to discard old ways of working.

BUT I DON'T REALLY WANT TO CHANGE

That sounds hard, right? What if we just stick with what we are doing? After all, we can't change the tracker, can we?

As people start communicating using other methods, we will either need to adapt and absorb those devices into our repertoire, or we will end up with unrepresentative samples. That will lead to inaccurate data and, ultimately, bad decisions.

We have no choice but to move forward. We need to keep a keen eye on what is coming and act accordingly.

That's why we're monitoring this and testing new communication methods as they start to gain traction.

Let's move forward together.



TO LEARN MORE, CONTACT:
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About Maru/Matchbox

[Maru/Matchbox](#), has been pushing the boundaries of the customer market insights space for over a decade. We combine deep sector expertise with cloud-based customer insights communities, and take a results-focused, consultative approach to helping clients better understand what motivates their customers and influences their markets, so they can act decisively and win.