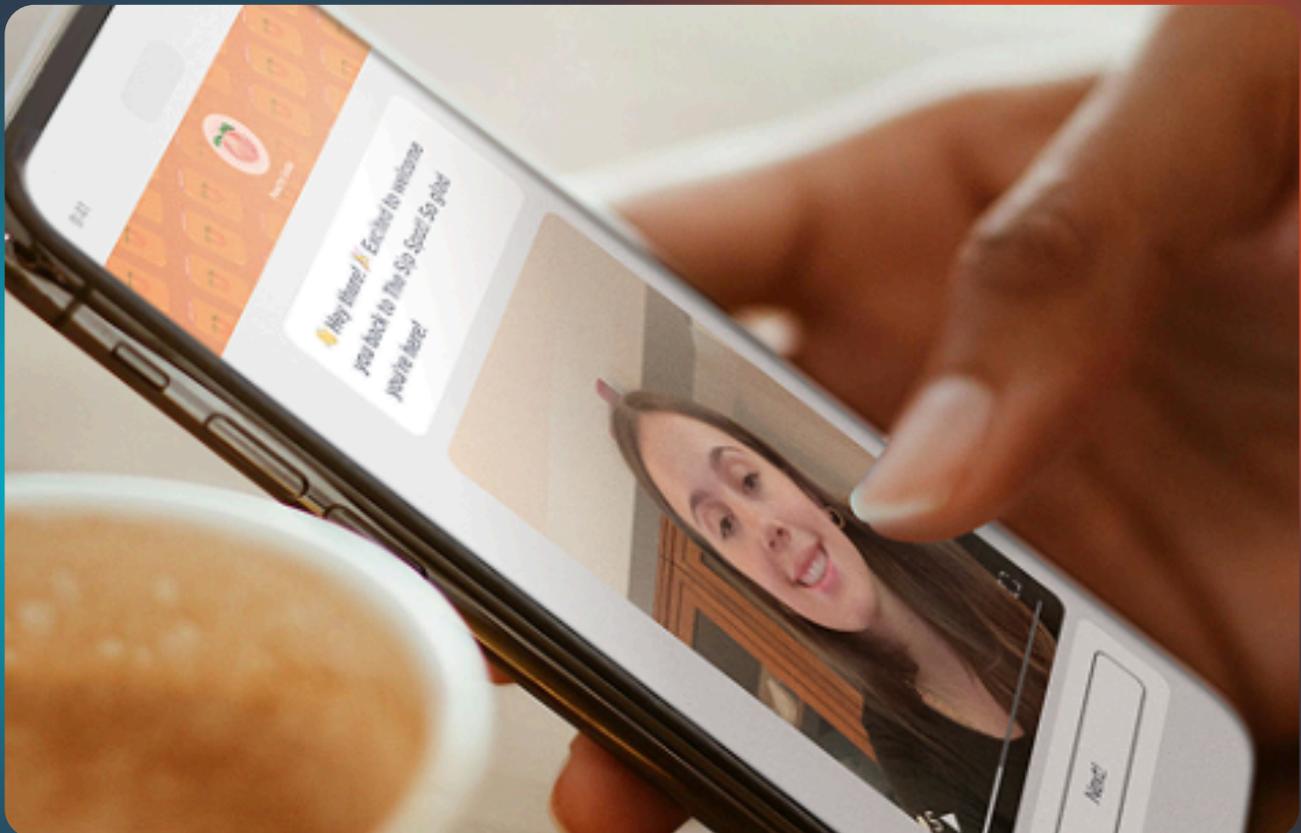


9 Conversational Research Principles

How conversational research unlocks engagement, richer AI inputs, and better outcomes



Introduction

To help companies get better insights, faster, we've developed nine foundational principles of conversational research design.

These principles have helped brands across industries and geographies create more meaningful, real-time connections with customers, even in times of uncertainty and transformation.

Today, the stakes are even higher. With artificial intelligence accelerating the speed of content creation, decision-making, and customer expectations, it is more important than ever for brands to listen actively and respond authentically. Conversational research is not just faster or more enjoyable for participants. It's an approach that aligns with how people communicate today: through messaging, video, and short-form content. When combined with AI-powered tools, conversational methods don't just scale, they deliver higher quality data that leads to more thoughtful, emotionally resonant insights. In fact, recent research-on-research shows that conversational formats such as video responses can generate up to 8x more depth and significantly outperform traditional surveys on key metrics like thoughtfulness, clarity, and relevance.

With new AI capabilities, researchers can unlock deeper emotional context and faster turnarounds without sacrificing data integrity. Our research has found that when people are engaged (e.g. when the experience is easy, enjoyable, and feels natural) they not only provide more meaningful feedback but are also more likely to participate again in the future.

We are excited to share these principles, along with examples from some of the world's most recognized brands, to help guide your own research evolution. Whether you're scaling quantitative surveys, integrating AI to make sense of unstructured feedback, or capturing in-the-moment insights via video, conversational research offers a more natural, robust, and responsive way to engage people. These principles are designed to support more human-centered, agile research, across formats, functions, and use cases.

4 reasons why you should read this e-book

Easy to apply and adopt

In a world of unpredictable consumer shifts, this e-book offers innovative methods that can be applied immediately, without requiring major changes to your strategy or roadmap.

Unlock future potential

The combination of mobile technology, AI-enhanced analysis, and conversational design delivers faster, richer insights. High-quality inputs from conversational research also strengthen AI models, making your insights more scalable, accurate, and future-ready.

Navigate a changing landscape

The insights industry has been slow to adapt to the ways people now share ideas and opinions, especially with brands. These principles will help you engage more effectively, design activities that feel relevant and natural, and build stronger data quality from the ground-up.

Cultivate deeper connections

While better business decisions remain the goal, how we gather insights also matters. Conversational research builds loyalty and trust, encouraging participants to open up and share more over time.

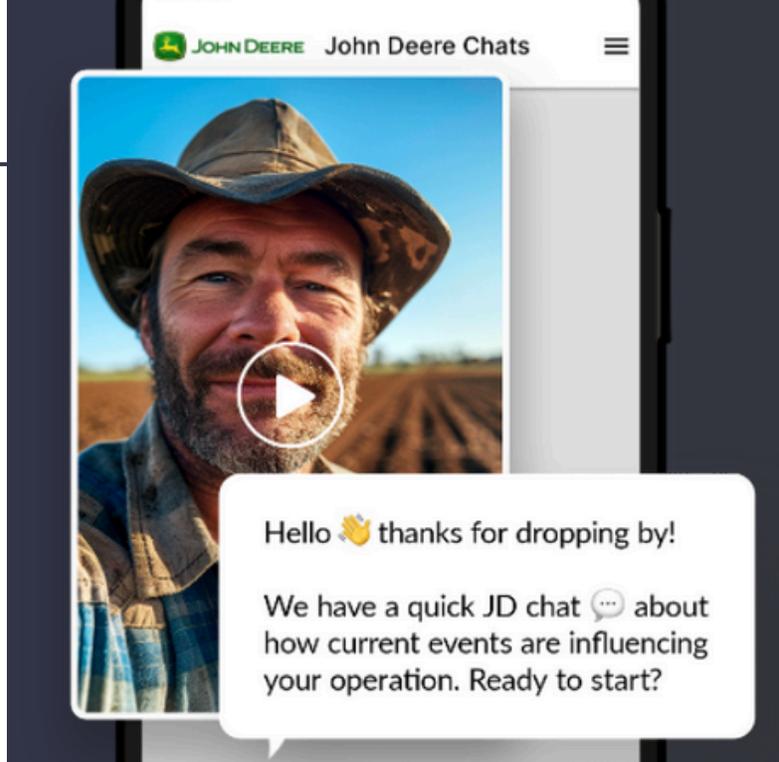
1. Get Real

Connect with real people, through the channels they actually use, for more authentic results.

Marketers have long emphasized the importance of reaching “unheard voices” and including “real people” in research. Yet many still rely on outdated methods (long, impersonal email surveys distributed through professional panel platforms), hoping for fresh insights from tired approaches. But authentic feedback comes from authentic interactions.

Conversational surveys, by contrast, feel more natural and intuitive, leading to significantly stronger results. On the Rival platform, this approach consistently delivers 87% completion rates and 65% recontact rates, far exceeding industry norms and helping brands build lasting, high-quality connections.

If you want to reach people who are often overlooked, whether that’s younger, mobile-first consumers or hard-to-reach working professionals, you need to meet them where they already are.



Real world application: John Deere reaches producers in the field with mobile-first research

To engage producers and dealers, many of whom spend their days in motion and away from desktops, John Deere needed a modern approach to research. Traditional email surveys weren’t cutting through.

By shifting to text message-based outreach and a conversational, mobile-first format, the brand dramatically improved participation and responsiveness. Producers now contribute rich feedback through video, photos, and open ends in real time. This approach helps John Deere better understand product performance, inform innovation, and stay connected with its customer base across global markets.

Takeaway

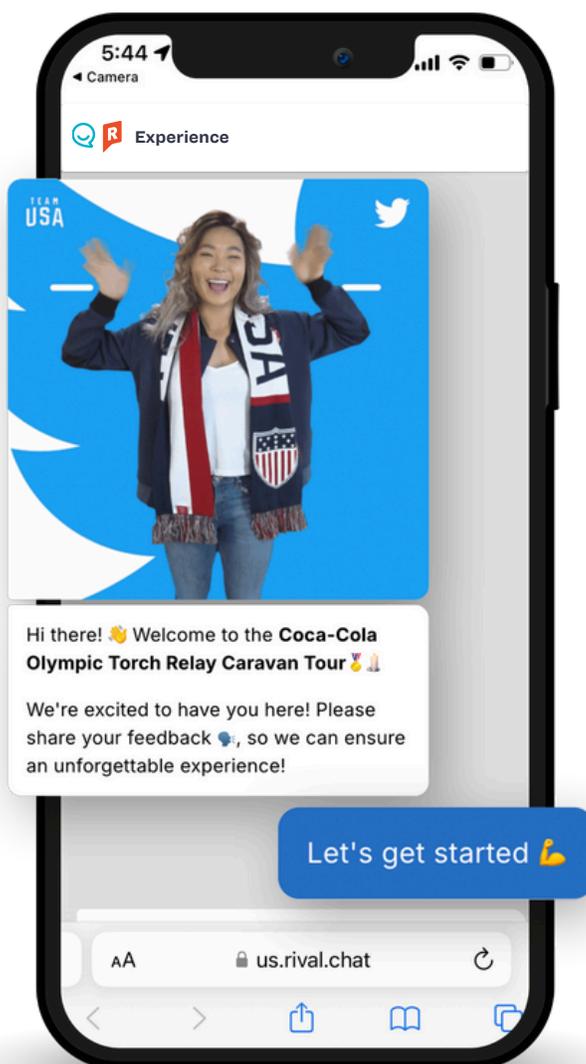
Every consumer has their own preferences, passions, and platforms. To unlock authentic insight and future-proof your research, connect with people in ways that feel natural and relevant to them. Part of this includes reaching them on the channels they already use, using the language and formats they trust.

2. Be Present

Engage with people in the moment you want to understand, not days or weeks later.

Most conventional research relies on memory. Long surveys sent after the fact feel more like tests than meaningful, timely conversations. Participants shift into “test-taking mode” instead of reacting naturally, and the results become over-engineered or incomplete. That’s the challenge with recall bias: even honest recollections are rarely complete or emotionally accurate.

To uncover the why behind behaviors, it’s essential to capture feedback while the experience is still fresh.





Real world application: Capturing in-the-moment feedback for Coca-Cola's experiential campaigns

Coca-Cola has long been a pioneer in experiential marketing, from music festivals and interactive pop-ups to immersive digital experiences. But measuring the impact of these activations in real time posed a challenge. Traditional post-event surveys and media metrics didn't offer the emotional nuance or immediacy Coke needed to optimize its campaigns.

Using the Rival platform and the Brand Experience Predictor (BXP) from Reach3 Insights, Coca-Cola captured in-the-moment feedback directly from consumers on-site, via mobile-first, conversational research. Participants shared first impressions, emotional reactions, and cultural relevance as the experience unfolded, then followed up later to explore lasting brand impact.

This approach gave Coke end-to-end insights across campaign stages, helped refine creative elements, and provided a clear read on ROI, all without disrupting the experience itself.

Takeaway

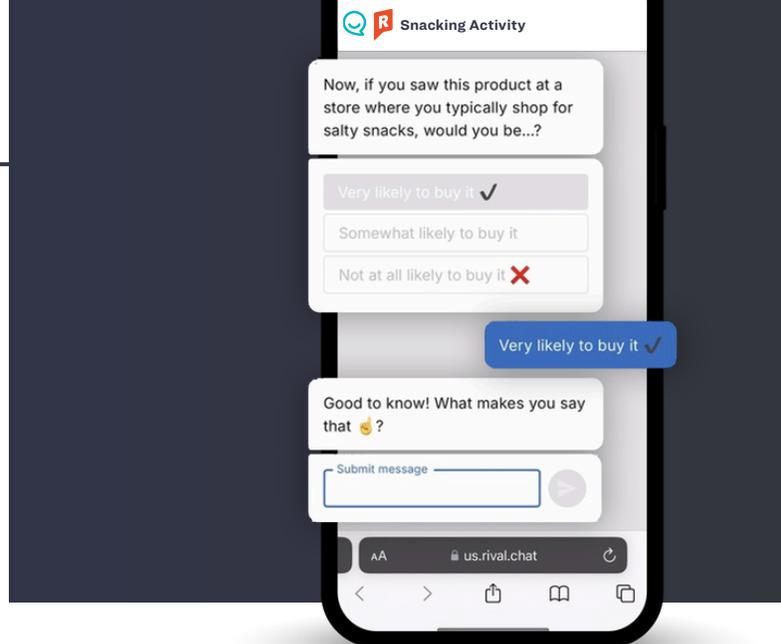
In-the-moment insights don't require in-person observation. Conversational research captures rich context, including photos, videos, and instant reactions, at scale and with less intrusion. The result: a deeper understanding of what people feel and do, exactly when it happens.

3. Engage

Get consumers out of “test-taking” mode.

Low engagement is a direct result of how most research is delivered: anonymous, time-consuming surveys emailed after the moment has passed. These activities don't feel enjoyable or relevant. They aren't personalized. And they rarely reflect the brand's tone or voice. As a result, response rates are low, and the confidence in the data follows suit.

If you want people to share honestly, the experience has to feel more like a conversation, and less like a chore or taking a test. In our research-on-research, 70% of 18–25 year-olds (and 70.5% of participants aged 45 and over) said chat-based research was more engaging than traditional approaches. No matter the demographic, people respond better when the experience is intuitive, mobile-first, and conversational.



Real world application: Kellanova blends quant and qual for richer, more relevant innovation feedback

When Kellanova (formerly Kellogg's) set out to test early-stage innovation territories for the Cheez-It brand, they needed a research approach that matched the boldness of the product, and the preferences of younger consumers. Traditional surveys wouldn't cut it. The team designed a conversational, mobile-first experience that felt less like a formal questionnaire and more like a brand interaction. Participants shared both quant input and media-rich qual, including photo and video uploads, leading to longer, more thoughtful open ends and deeper emotional insight. Smart AI-accelerated recontact capabilities also allowed the team to follow up in real time to explore emerging themes and optimize concepts midstream.

By combining rigor with relevance, Kellanova didn't have to choose between structured metrics and human context. The approach led to greater engagement, higher-quality responses, and ultimately a clear path forward for product development.

Takeaway

When the research feels like a conversation, participants respond differently: more honestly, more thoughtfully, and more authentically. Meet people on their preferred devices and use formats they already know. You'll get better engagement and better answers.

4. Respect People's Time

Embrace the need for speed.

The world is moving fast, but most research still isn't. Traditional methods rely on lengthy email surveys with slow turnaround times. In today's instant, mobile-first culture, brands that want to stay ahead need faster, more agile ways to connect with consumers. The volume alone is overwhelming: in 2025, it is estimated that over 376 billion emails will be sent and received every single day (source: Prosperity Media). It's no wonder that survey invitations often go ignored.

The good news? You don't have to sacrifice quality for speed. In fact, on the Rival platform, Reach3's mobile-first, conversational studies regularly achieve 87% completion rates. When the experience is simple, relevant, and timely, people are more likely to respond, and to respond meaningfully.

By leveraging conversational design and mobile messaging, you can engage people in the moment, get to the heart of what matters quickly, and deliver insights that drive real-time decisions. And on the back end, AI tools now help accelerate synthesis, ensuring you can act on what you learn as fast as you capture it.



Real world application: **Brunswick transforms customer feedback with agile, automated research**

Brunswick, the world's largest maker of recreational boats, has seen a wave of new customers in recent years, many of whom don't fit the brand's traditional buyer profile. The company needed to quickly understand the needs, experiences, and expectations of this new audience to turn first-time buyers into lifelong customers.

Partnering with Reach3, Brunswick launched a mobile-first community called Ripl on the Rival platform, designed to engage new boaters continuously across their ownership journey. Through text message and chat-based surveys, the team captured both quant and qual feedback in real time, making insight-driven decisions within hours, not weeks.

To scale the process, Brunswick integrated Rival with its CRM. When a new customer opts in, an API triggers automated enrollment, screening, and welcome chats, eliminating hours of manual effort and keeping the program running smoothly as the community grows.

Takeaway

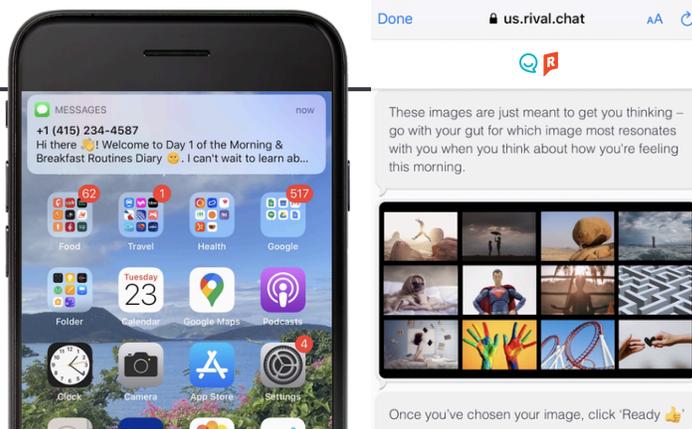
Move fast, keep it simple, and give participants control. Today's consumers expect short, convenient, and respectful research experiences. By adapting your approach to match their expectations, you'll earn better engagement and get the answers you need faster.

5. Go Deep

Capture 3D insights — behavior, emotion, and context — in a single research touchpoint.

Big data can tell you what happened, but not always *why* it happened. Transactional metrics and clickstream behavior are valuable, but they often lack emotional depth and human context. To understand what drives real-world decisions, researchers need to go beyond the surface and listen to people as whole humans, not just data points.

That’s where conversational research excels. When you engage people through their mobile devices using chat, photos, and video, you can capture the feelings and context behind their choices without breaking the flow of their lives. In fact, in our study, video responses were nearly 8x longer than traditional open ends and rated the highest in emotional insight, clarity, and specificity. Using our proprietary Thoughtfulness Score (which measures depth, relevance, and value), video responses scored 6.7 out of 10, compared to 3.7 for traditional open ends and 6.2 for AI-probed conversational text.



Real world application: Tyson Foods uses mobile ethnography to shape future innovation

As routines shifted during the pandemic, Tyson wanted to better understand how people were adapting their morning habits and which behaviors were likely to stick. While sales data showed change, it couldn’t explain the “why”.

We partnered with Tyson to run a modern, mobile-first consumption diary program. Participants used mobile chats, photos, and selfie videos to document their breakfast routines in real time, across both weekdays and weekends. They described what they were making, who was in the room, what the vibe was like, and what motivated their choices.

The result? A layered, nuanced picture of consumption occasions that helped Tyson understand what was happening, plus how it felt, and why it mattered. These insights are now informing innovation pipelines and brand positioning across multiple product lines.

Takeaway

AI tools like summarization and clustering now make it easier to analyze this type of unstructured input at scale, helping researchers uncover meaning across hundreds of real-life moments with greater speed and consistency. To predict what's next, you need to understand what's underneath. By combining emotional cues, real-world context, and behavioral data in one conversation, you unlock insights that are more complete, more human, and more powerful.

6. Continue The Dialogue

Re-engage to drive ongoing, iterative learning.

Great insights rarely come from a single interaction. Like any relationship, building understanding takes time, trust, and consistency. Modern consumers prefer bite-sized, ongoing conversations, not one-off surveys that feel transactional or forgettable.

The good news is, mobile messaging and conversational design make it easy to keep the dialogue going. In fact, clients using Rival's platform typically see recontact rates above 65%, a strong signal that participants are open to returning when the experience is convenient and well-timed. This ability to re-engage participants also gives researchers the flexibility to keep surveys short, knowing they can always return to dig deeper without starting from scratch.

By checking in at key moments, researchers can build stronger connections, uncover deeper insights, and adapt in real time as experiences evolve. New technologies like AI-driven probing also make it possible to go further in each interaction. Rival's Smart AI Probe, for instance, uses a proprietary Thoughtfulness Score to evaluate open-ended responses across voice, video, and text. When a response lacks clarity or depth, the tool triggers context-aware follow-up questions to encourage richer feedback. The result: more thoughtful, layered responses, without additional burden on the participant.

TimeOut



Real world application: Time Out transforms a flagship study into an always-on feedback loop

To reinvent its annual Global City Survey, Time Out turned to mobile-first, conversational research. Instead of running a single, static survey, the brand used short, chat-style engagements across 45 languages to gather real-time, in-the-moment input from 18,500 participants in nearly 60 countries.

That success sparked a shift toward ongoing feedback. With the launch of “Time Out Loud,” an always-on insight community, the team now taps into video, text, and image-based input throughout the year. Community members are active collaborators, sharing candid feedback on marketing campaigns, cultural trends, and new content directions. Over time, this consistent cadence of engagement has helped Time Out move from reactive insights to proactive strategy, keeping pace with cultural shifts and consumer sentiment.

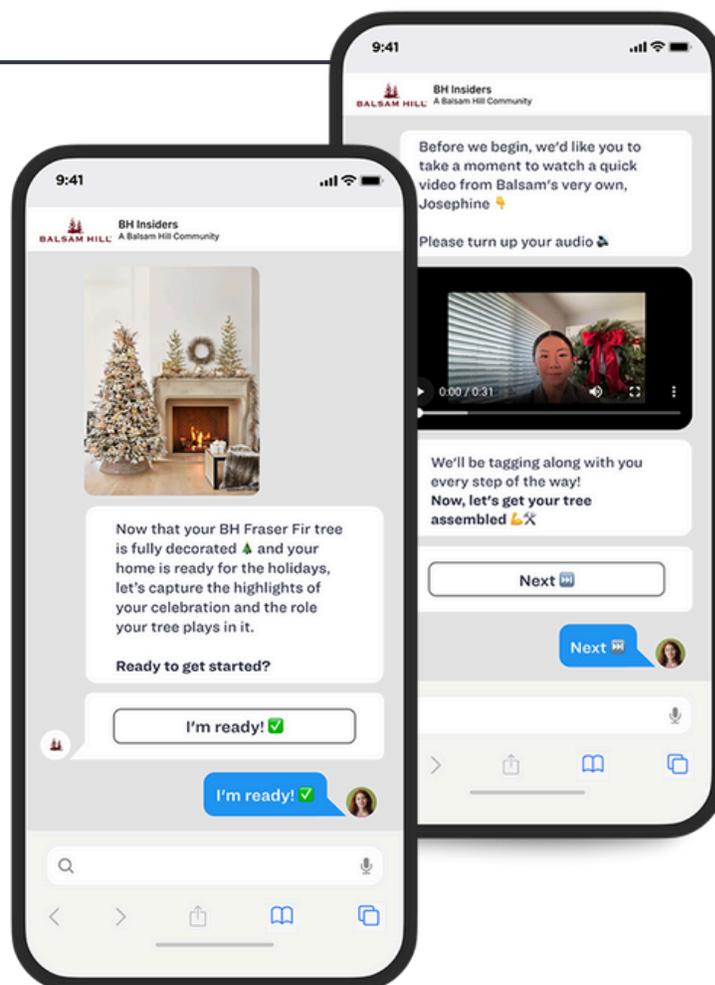
Takeaway

One long survey can’t compete with a smart sequence of short ones. And with thoughtful AI prompting built into those moments, researchers can surface richer insights without sacrificing the participant experience. Each touchpoint becomes a chance to listen, learn, and evolve.

7. Represent yourself well

Elevate your brand through the participant experience.

Companies spend millions building their brand and obsessing over customer experience except, all too often, in research. Surveys can feel disconnected, transactional, or even tedious. But every research interaction is a brand touchpoint. When done right, research can reinforce brand values, generate meaningful engagement, and even shift internal culture.



Real world application: Balsam Hill uses research to drive creative and strategic momentum

Known for creating the world's most realistic artificial Christmas trees, Balsam Hill built its first-ever insights program with Rival Technologies. The flagship initiative, called the "Tree Journey," followed the full post-purchase experience, from delivery and setup to celebration and storage. Using the Rival platform, the team captured quant, qual, and video feedback that proved so impactful, it was soon referenced in internal briefs and creative decisions.

One key moment came from a customer video: "It's not a product, it's an experience." That quote became the centerpiece of a major campaign. Another study revealed confusion around tree setup, particularly the need to "fluff" interior branches. That insight sparked updates to content, support materials, and merchandising. Since launch, Balsam Hill has executed dozens of studies through its custom community, achieving response rates over 15 times higher than their previous email surveys. Feedback now shapes seasonal catalogs, style guides, even customer service scripts.

Takeaway

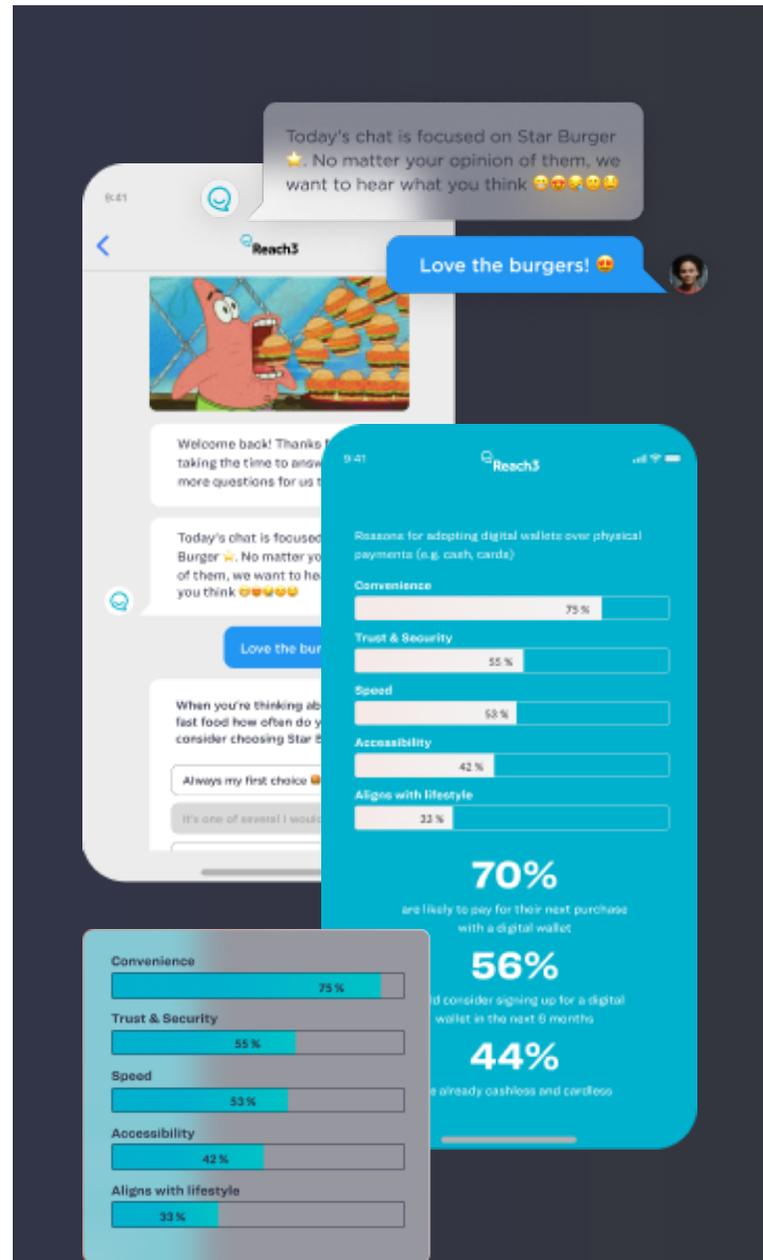
Research is not separate from your brand. When you reflect your voice, values, and design in the research experience, participants feel seen, heard, and connected, and that drives higher engagement and better insights.

8. Tell Compelling Stories

Activate your insights through mobile-first, visual storytelling.

Insights alone aren't enough. Without a clear, compelling story to carry them forward, even the best research can stall before it makes an impact, especially if it is delivered in a way that feels flat or disconnected. That's why storytelling matters. It transforms findings into messages that resonate.

As Jeff Gothelf wrote in [Harvard Business Review](#), compelling stories follow five essential rules: they are audience-specific, contextualized, humanized, action-oriented, and humble. When applied to research, these rules help insight teams create deliverables that inform decisions and spark meaningful change.



Real world application: Kimberly-Clark turns shopper feedback into measurable results

During a period of disruption, Kimberly-Clark needed to better understand how grocery shopping behaviors were evolving, and help retail partners adapt quickly. Instead of a static report, they delivered an award-winning Reach3 curated, mobile-friendly deliverable featuring a blend of quantitative data and authentic shopper videos, edited and summarized to show the emotional context behind decisions.

By hearing from real consumers, internal teams and external partners alike were able to align on next steps more quickly. In one case, a major retail partner made changes to its mobile app experience based on shopper feedback, resulting in a 20% sales increase within six months.



Takeaway

Conversational techniques allow you to go beyond dashboards and PowerPoint. Video-based summaries and AI-enhanced highlight reels put real people at the center of your story. When insights are delivered in a way that's easy to absorb and emotionally resonant, they're far more likely to influence decisions.

9. Use AI to elevate, not replace, human insight

Use AI to analyze, synthesize, and scale what people are really saying.

Artificial intelligence is transforming how we collect, interpret, and act on consumer feedback. But in research, AI works best not as a replacement for human understanding, but as an amplifier of it. When paired with conversational design, AI-powered tools can make unstructured data more accessible by detecting patterns, extracting emotion, and synthesizing open-ended responses, all while preserving the nuance of the original input.

Our research-on-research shows just how powerful this combination can be. Conversational methods consistently yield richer data: open-ended responses were 2.5x longer than traditional formats, 5x longer when AI probing was used, and nearly 8x longer with video. These responses also scored significantly higher on depth, clarity, and emotional resonance—essential qualities for training and refining AI models. When inputs improve, AI outputs follow suit.

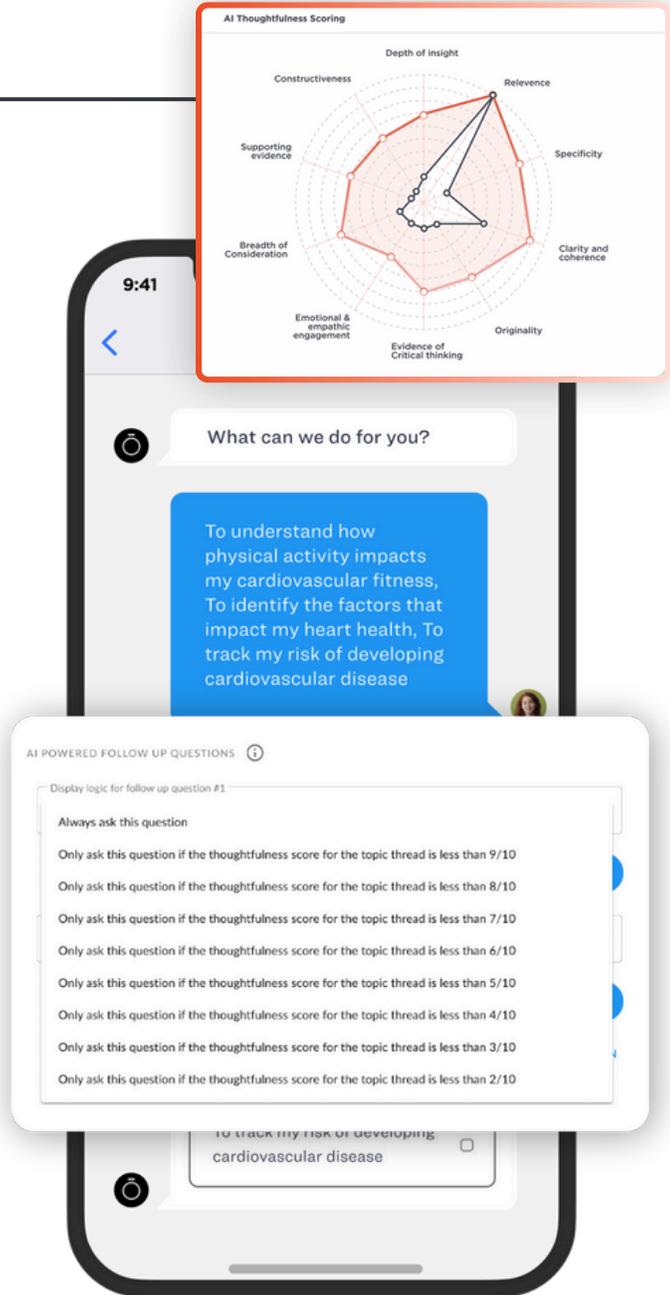
The opportunity is not about automation for its own sake. It is about making the work more thoughtful. AI can increase research capacity, speed up synthesis, and surface insights that may otherwise go unnoticed. But only when it's grounded in a methodology that prioritizes authentic engagement and high-quality, conversational inputs.



Real world application: ŌURA increases capacity and insight quality with AI-powered conversational research

ŌURA, the health technology pioneer behind the smart ring used by over 2.5 million people, launched a mobile-first community to capture candid, in-the-moment feedback from its members. Through Oura’s Inner Circle, the team rapidly scaled up its research output while maintaining quality and empathy.

Using Rival’s AI Summarizer, the team synthesized thousands of open-ends to identify emerging themes, even across sensitive or nuanced topics. When testing Rival’s Smart AI Probe tool, which prompts participants to expand on their responses, ŌURA saw a 293% improvement in response quality based on a custom thoughtfulness score. Notably, 99% of participants said the AI-generated questions were easy to understand, with 94% calling them relevant and appropriate.



Takeaway

AI should enhance your work, not override it. When built into a thoughtful research process, AI tools can help you go faster, dig deeper, and deliver more meaningful insight while keeping the participant experience natural, human, and real.

Conclusion

Consumers want to have real conversations with brands that are honest, timely, and grounded in the channels they already use. It's not enough to simply adapt old methods to new platforms. Today's expectations call for a deeper reimagining of how we engage, listen, and act.

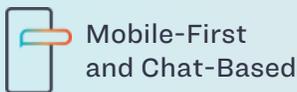
The principles in this paper reflect a people-first approach to research. They encourage us to connect through familiar, mobile-first formats; to capture context in the moment; and to maintain empathy at every step. With the right tools, especially with innovations surrounding AI-powered capabilities, researchers can now scale that approach without losing the nuance that makes qualitative insights meaningful.

Agentic AI represents the next leap forward. These intelligent systems can coordinate tasks like probing, summarizing, and reporting, offering new levels of speed, consistency, and clarity. But even as AI helps researchers do more, faster, the role of human judgment remains essential. The most impactful insights emerge when technology augments rather than replacing researcher thinking.

The shift to more conversational, AI-enhanced research will be an evolution, not a flip of a switch. But change is already underway. We've seen it at work in real-life (with outstanding results) for companies in sectors ranging from financial services and healthcare all the way to consumer goods and media companies. When researchers embrace these principles, they can future-proof their roles, deliver deeper value to the business, and ensure that the voice of the customer is heard with more clarity and impact than ever before.

Conversational Research Trailblazers

Deeper, Authentic Connections.
Real-time Insights. Transformative Results.



Mobile-First and Chat-Based



Quant, Qual, and Unlimited Videos



AI-Enhanced Tooling



Next-Gen Communities

