Britain Talks Climate

Advice for reaching target segments online

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Using a chatbot survey

To carry out message testing against the seven segments, or to target one or more of the segments, digitally, you'll need the golden questions and Excel calculator, plus a few more tools.

You can use a platform like Chatfuel, which is highly intuitive and doesn't require any knowledge of coding or web development, to turn the golden questions into a chatbot survey on Facebook Messenger. A chatbot is essentially automated messaging software that uses artificial intelligence to converse with people. In this case, it is able to ask a series of questions and store every output to a 'unique attribute field' and every respondent to a 'unique identifier', both automated via Chatfuel, which becomes important later on.

You must keep the questions in exactly the same order, and with the same wording, as above, but you may want to add a 'welcome' and 'thank you' message to the beginning and end. You may also like to add emojis throughout, to create a more informal and conversational tone.
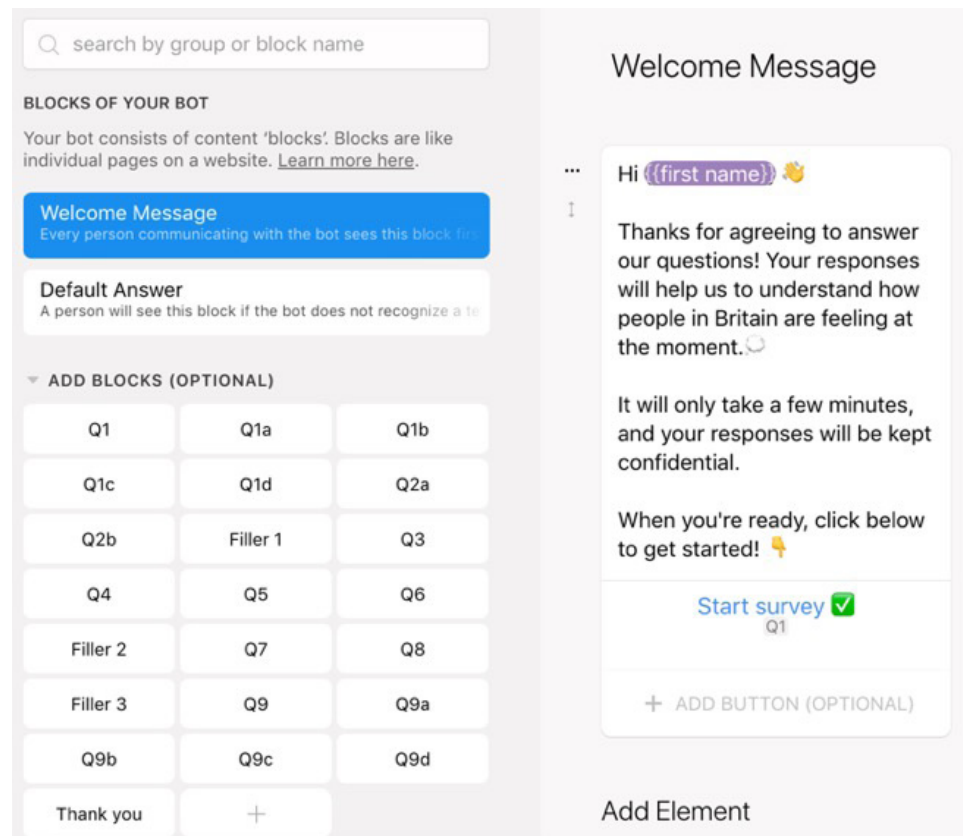

Figure 65. Set-up (left) and welcome message (right) for Chatfuel survey

You then deliver the chatbot survey through Facebook Messenger, which will present each question a little like this:

Figure 66. Questions shown on Facebook Messenger (left) and Facebook advertisements (right)

To drive a high enough number of responses, you may want to attract people to use the chatbot (and take the survey) using a range of Facebook ads with different imagery and messaging. This way you can see which ad is driving the most traffic at the lowest cost and turn all other variants off. You can also track which ads drive higher or lower responses from different segments.

Once you think a high enough number of people have taken the survey – you need a minimum of 100 per segment to be representative – you can download the responses, including the 'unique identifier' (Column B – identity), and run them through the bulk calculator as before. Individuals will be automatically assigned to a segment. You may need to continue running the ad if you're still short of responses in one or more segments.

Next, you can upload the list of unique identifiers for each segment in turn as a CSV file to 'Custom Audiences' on Facebook. Facebook will then match each identifier to their Facebook account, without giving out any personal information, so you can create 'lookalike' audiences for each segment, enabling you to reach thousands at a time.

Then select 'Facebook app user ID' from the list of identifiers.

By clicking on 'next', Facebook will then generate 'lookalike' audiences – this is a tool that finds users whose demographics and interests are similar to those of the provided sample, each containing upwards of 400,000 people. You can use this process to test various messages against the seven segments, or to target your campaign in different ways, depending on the audience.

Contact us

We hope you find this toolkit useful for the work that you and your colleagues do on climate change. Please let us know how you're using it, and what we can do to improve the resource, by contacting britaintalksclimate@climateoutreach.org.