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How FOCUS FACILITIES Are **REINVENTING THEMSELVES**

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How FOCUS FACILITIES Are **REINVENTING THEMSELVES**

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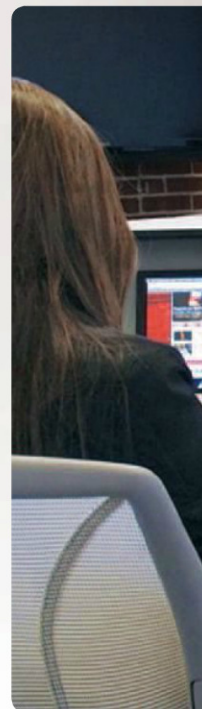
The focus group facility industry has seen a lot of changes over the years. At first, there was not even a facility industry at all; instead, focus groups were conducted in spare conference rooms in advertising agencies. Recruiting evolved from rounding up folks around the office to methods for proactively identifying and inviting people who met key criteria. Eventually, independent qualitative researchers began inviting people into their own homes for group discussions (i.e., the original living-room setup). Then, qualitative field companies moved into dedicated space in office buildings with research rooms with one-way mirrors and observation rooms for clients.

The industry both expanded and consolidated: expanded as more and more facilities opened up, but also consolidated as ownership and management moved

from a “mom-and-pop” approach to a true business/corporate model. Facilities came together in networks and alliances to provide efficiencies and economies of scale across multiple markets, offering clients the potential for a one-stop field-service shop.

Today, many industry observers feel that focus facilities need to reinvent themselves once again. And reinventing they are. Certainly, we all know that many facilities now offer the option to swap out the standard conference-table furniture arrangement, but focus facilities are also reinventing themselves in many other ways.

In fact, no specific model or template represents what this reinvention looks like. Some facilities are trying ideas that others are not, and inevitably some of these ideas will not make the final cut. Great and lasting ideas, however, are





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coming out of this experimentation, and some general trends with focus facilities today give us a hint of the future of the industry.

I recently spoke with a number of facility owners and managers about trends in the facility business. From these conversations, I have identified four major areas in which facilities are reinventing themselves today:

- The focus facility industry may be experiencing a contraction, with some facilities closing. Everyone I spoke with, though, feels that **the focus facility is here to stay**. None feels that focus facilities are going the way of the dinosaur — face-to-face research provides

unique benefits that will continue to be utilized, and facilities will be there to serve that need. Right now represents a shakeout that ultimately will leave the industry with stronger players that are better able to handle the increasingly complex and demanding needs of clients.

- Changes are being made to the **physical space** within focus facilities: room layout, furniture, client amenities, etc.
- In order to be more efficient and effective research partners for clients, facilities have been moving rapidly to **expand their service offerings**.
- Also, many changes “**behind the scenes**” will provide benefits for clients

and the industry, even if these changes are not obvious when you walk in the door.

Face-to-Face Qualitative Research Is Here to Stay

First off, it is true that clients and researchers are recognizing the valid benefits of technology to enhance marketing research. Today's world puts technology literally in the majority of people's hands, together with an explosion of emerging technological applications designed to monitor and interact with the public, creating a seeming research “perfect storm.”

At the same time, it is also true that these same clients and researchers understand that, for all the wow and wonder that the new technologies provide, face-to-face interviews and discussions also have their unique benefits for research. Now that mobile and online research are fairly well established, many clients and researchers have a base of experience from which to see more clearly some of the inherent flaws and limitations of purely technological approaches. As a result, **Charlene Randall** of L&E Research is seeing “a renewed appreciation of the value of traditional qualitative research.” And of course, certain types of research, whether qual or quant, can be done *only* in person.

Therefore, the need for face-to-face qualitative research is not going away, so focus facilities will not go away either. They do need to adapt, though, to changing business climates, societal trends, research methodologies and client needs. “The signs point to a new age in the facility business,” says **Jim Bryson** of 20/20 Research.

Fewer Facilities?

While there always have been some facilities opening and others closing, the net effect at the moment seems to be a reduction in the total number of facilities. Even more concerning for the industry are rumors that many more closings are imminent, with owners keeping the doors open only while they wait out the expiration on their office-space lease. Will it happen? Well, my crystal ball is a little fuzzy on that one, but we must remember that every industry is subject to occasional fits of expansion or contrac-

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20/20 Research, Charlotte



tion, so seeing a few facilities close does not necessarily mean the start of a long-term trend.

Jay White of Baltimore Research points out, “The volatility of business over these past few years has forced the constant review and subsequent revision of [focus facility] business models. And that’s a good thing.” So, yes, some facilities have closed, and the result, Jay feels, is a Darwinian survival-of-the-fittest situation that advances the industry with “the stronger, more research-savvy facilities” not only surviving but also better positioned to invest in facility enhancements, technology and personnel to execute projects with greater accuracy, speed and efficiencies. My discussions with these facility owners and managers bear this out, as most are highly optimistic and are investing assertively in their facilities — with both financial and intellectual capital — to meet the demands of the future.

The Physical Facility

The most obvious place to see how facilities are reinventing themselves is the physical facility itself. Some facilities have created adaptable, flexible spaces that can be configured any number of ways, such as a living room that actually looks and feels like a living room rather than just a conference room with different furniture. It goes beyond that, though, to setups that feel like a sports bar, a courtroom, a home kitchen and other environments.

Some facilities are progressing down this path even further, with entire residential houses retooled into focus facilities that do not just *resemble* homes — they *are* homes. Bret Agre of Ingather Research says that his facility is “trying to bring realism back to the focus group



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experience.” Basically, his idea is that the “traditional” focus facility (i.e., in an office building, with a conference-room setup and large mirror in the wall) does not recreate the environment in which real conversations take place, such as what women would say about a product as they talk casually gathered in someone’s kitchen. For that, he feels, research is best conducted in a real kitchen in a real home. “It’s all about making respondents feel comfortable and less like they are being judged or are guinea pigs,” he says.

Eva Niewiadomski of Catalyst Ranch also attests to the growing demand to

explore alternative venues, noting that her facility is “a creative meeting and event space that kept getting requests to hold focus groups in our rooms.”

Physical space for clients has been changing as well. Some facilities are dedicating less space for clients to passively observe and more space for them to actively participate in the research process and engage with respondents. Other facilities are giving clients *more* space and amenities, such as separate lounges for observation, food and phone calls.

Facilities also are remodeling with expressions of unique style. Uniformity and generic neutral tones have been giv-

ing way to colors, patterns and textures, bestowing on each facility (and even each room within a facility) a unique look.

Service Offerings

Additionally, focus facilities are expanding their service offerings. The common wisdom seems to be that qualitative research in the future will include more and more assignments that incorporate multiple methodological approaches within each project and more coordination of technological tools, and clients will prefer the streamlining and potential cost efficiencies of working with one research partner adept at meeting all of their needs.

For this, focus facilities are well positioned to take the lead. Facilities are moving away from being just a collection of focus group suites with a recruiting room in the back and instead are becoming broader field operations for many kinds of research — and not just qualitative but also quantitative research that requires or benefits from in-person interviewing. Today’s evolving facilities can offer the best choice and ideal environment for clients who want a single partner for conducting emerging hybrid methodologies that might mix quant with qual, online with face-to-face, observational with dialogue.

So, facilities are investing in being able to offer services such as their own video-streaming solutions, proprietary online-research platforms, in-house turn-key usability testing, eye-tracking capabilities, biometrics, nationwide recruiting and even a mobile focus-group-in-a-suitcase unit to allow clients to conduct in-person research anywhere.

There is a flip side, though, to all of this expansion of services, observes Jay Shelton of IndyFocus. As facilities broaden their offerings, they also begin to compete with each other, not just in the same market as expected but also across markets. So, even if the number of facilities declines, the competition among facility companies could go up.

Facilities also are expanding their services for clients. Many are developing a client portal that will allow clients to see a dashboard summary and easy access to all aspects of their project.

Several people I spoke with referenced that they are becoming hyper-focused on

Catalyst Ranch



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client service in general. It is no longer enough anymore to just greet arriving clients with a warm smile at the door; now facilities are remembering each client's unique preferences (i.e., this one always likes two water bottles on the table, that one does not eat meat) and ensuring they can provide a customized experience to make each client at ease.

Behind the Scenes

Some of the ways focus facilities are reinventing themselves may not be as obvious at first glance, but many of these changes represent the "backbone" to support the other changes already noted. The biggest of these behind-the-scenes changes is technology.

Just a few years ago, the "tech geek" at a focus facility was the person who knew how to un-jam the VCR, but today focus facilities have IT directors, and some larger facility companies have entire IT departments. **Barbara Gassaway** of Observation Baltimore notes, "Clients expect that you will have expertise in all technology areas, even when it's the client's equipment."

For many of the broader service options that facilities can now provide, technology is fundamental, so there is a constant need at the facility for expertise in internet connectivity, website development, database conversion, social-media platforms, integrated systems, client setup, etc. Some facilities have developed proprietary facility-management software designed to improve their operational efficiency specifically by uniting all the facility's data and programs into a single system and interface.

Also, many facilities are reflecting greater concern for the environment. Some have moved to paperless or reduced-paper systems. All are recycling, and many will use only recycled goods when possible. Most facilities have reviewed everything, from light bulbs to the packaging of the client snacks, to see where they can reduce waste, keep costs down for clients and help the environment.

A truly major behind-the-scenes change that is taking place with many facilities and recruiters is the use of social media as part of the recruiting effort. Most of the people I spoke with said that they are using social media in

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How Focus Facilities Are Reinventing Themselves CONTINUED

recruiting to some extent, but many were quick to add that they do so only with the client's permission. In general,

however, it seems that these facility owners and managers see a future in which the use of social media for recruit-

ing is inevitable: there is no other way to service clients' attempts at laser-targeting low-incidence populations with longer and longer screeners that include complex algorithms and super-specific criteria, all in shorter timeframes than ever before and, of course, for the lowest cost.

Used properly and with care, though, social media can be a good thing for recruiting, perhaps even its salvation. **Stephen Turner** of Fieldwork Inc. points out that the use of social media in recruiting not only gives a greater reach but also gives the recruiting effort what amounts to a wider time window. "Used to be, we recruited largely from 6 to 9 p.m.," he points out. "Today, we can recruit day and night."

The New Focus Facility

Focus facilities are reinventing themselves in many ways, on many different levels. Facility companies are broadening their position in the research supplier marketplace, migrating their service offerings away from a compartmentalized mentality ("This one is a focus facility company, and this one is an online provider...") to being a more broad-based qualitative and in-person field partner. Facility owners are not just sitting still, watching their traditional business erode; they have specific game plans for positioning their companies for the future.

And many of these owners are enthusiastic at the prospects. **Debby Schlesinger** of Schlesinger Associates observes, "We need to try new tools, use social media wisely and keep our minds open to exciting ideas that will keep the industry relevant."

In a way, it seems that everything old is new again. Years ago, focus groups were held in someone's home, and one of the hot new trends today is a focus facility in a home. Industry observers ask if focus facilities are reinventing themselves, but have they not always done that? Haven't facilities always been adapting and reinventing themselves? So, you could say that focus facilities do not need to reinvent themselves at all, that they just need to keep doing what they have always done — adapt to an ever-changing environment and be ready to take care of clients' needs. ■

Fieldwork Inc., Chicago – Downtown



Fieldwork Inc., Chicago – O'Hare

