

CHAPTER 8

Bringing Real World Context into the Focus Group Setting

Peter Coughlan and Aaron Sklar

8.1 INTRODUCTION

This chapter examines the ways that IDEO, a design consulting firm, has adapted the standard focus group methodology in order to better inform its own process. These adaptations introduce elements of the ‘real world’ into the focus group setting, and extend the focus group setting back into the real world. We provide examples from actual project work with our clients to illustrate how our adaptations have led to a more effective design research methodology.

Focus groups have long been an important tool in the market researcher’s toolkit. Most of what we have come to think of as the ‘standard’ focus group methodology has been developed through this market-focused application. As design practitioners, however, we have found the standard focus group methodology to fall short as a useful design tool, for two important reasons.

First, the standard focus group relies heavily on what people say they do or think they do, rather than what they actually do. In our experience, we have found verbal accounts of behaviour to be less accurate than observation of actual behaviour in real world settings. Humans are great confabulators – when put on the spot, we can usually come up with a verbal explanation of a particular behaviour or feeling (‘Oh, I do/feel X because of Y’). When we scratch below the surface explanation, we can often find some other variable at play, one that we are not able to articulate because we are not conscious of it.

Second, focus groups cut people off from the contexts where they live their lives. People use their environments and tools to prompt them as to the next step in a sequence of steps; places prompt memories of past experiences. Sequestered in a barren room with a handful of strangers, people are stripped of some important resources that would ordinarily help structure their behaviours. Without these resources, we must rely solely on their accounts of their behaviours.

8.2 SOME BACKGROUND ABOUT IDEO

IDEO is a design consulting firm that helps its clients to create new experiences through the creation of products, processes, environments and communications. Fundamental to our process is a deep understanding of how our clients’ customers or other stakeholders (such as employees, collaborators and users) behave in the real world. Most business people only know their stakeholders as members of particular market segments, with a specific demographic or psychographic profile; few spend time seeing these stakeholders as whole people, watching them experience life (or their company’s products or processes) in everyday settings.

At IDEO, designers and design researchers inform the design process by looking at real world behaviour – that is, by understanding and observing behaviour in the everyday conditions in which design solutions will be adopted and adapted by various users. At the onset of a project, research helps the design team to *discover* unique and innovative opportunities and concepts. Through observation of people in everyday contexts, engaged in everyday activities, we seek to reveal people’s unmet needs, or the ways in which existing designs fail to support their behaviours.

During design development, research is primarily employed to *test* prototypes of potential concepts by observing how users react to and employ the prototypes during tasks we ask them to perform. The findings from this prototype testing then inform subsequent refinement of concepts.

During the discovery phase of our work, market-research-style focus groups are not a mainstay of our design research process. However, during prototype testing, we have developed numerous variations on the focus group methodology to help inform our design process in ways consistent with our earlier methodologies.

The following pages describe our experiences with the use of focus groups, and provide suggestions about how to augment the more traditional focus group methods to better support the design process. Underlying all of our changes to standard focus group methodology is a desire to re-introduce *context* to the somewhat decontextualised setting of the traditional focus group – or, in other words, to augment the focus group setting with some of the trappings of the real world, and people’s real-world behaviour.

8.3 FIRST AND FOREMOST, USE FOCUS GROUPS FOR THE RIGHT REASONS

Perhaps the primary reason that focus groups have gained so much popularity as a research tool in product development is that they provide a means for members of a development team to get relatively quick input or feedback about a potential design direction. In a period of a couple hours, the team can get a qualitative understanding of multiple potential customers’ personalities, as well as their reactions to a series of design concepts or directions. In order to bring eight to ten individuals together for a discussion, however, we must often ask research participants to check their individuality at the door. In the space of two hours, there is little opportunity to explore some of the very things that designers find so interesting and inspiring – people’s passions, quirks, pet peeves, rituals, or the behaviours they have developed to cope with a poorly-designed product, service, or environment.

Although these (seemingly mundane) behaviours and beliefs often provide the inspiration for innovation, they rarely surface in a traditional focus group setting. For this reason, IDEO believes that focus groups are better used in some parts of the design process than in others. In general, we counsel our clients to use focus groups not for *discovery*, but rather to *test* ideas that have been created after new concepts have been discovered through other means. Discovery is triggered by looking at how people interact with one another and with designed objects in real-life settings; in how they engage with existing products, services, environments, communications, and systems; and in how they cope with change on a day-to-day basis. This kind of information is difficult, if not impossible, to capture in a focus group setting, where research participants have no access to the very artefacts that trigger and support their day-to-day behaviours.

One client we worked with had conducted focus groups at the onset of a design development program in order to help them with the design of a new website that offered web-based software services. The moderator for these sessions asked some potential

software customers to describe ‘the perfect online software service’. Participants spent the better part of two hours talking vaguely about good service, general brand values, and what services they thought they might need. At the end of the two hours, the client’s general direction had been validated – confirming what they had already suspected before the start of the groups. Yet no specific direction had been identified as to how the service(s) could or should be designed or integrated into existing needs and behaviours. Nor was the client any closer to understanding how to create an interface for their users, or how to manifest their brand in that interface.

For answers to these questions, our design team sought out people whom we felt might need the services our client had to offer. We went into their offices and were given guided tours of their physical and virtual desktops; we visited our subjects’ favourite websites, and shadowed them as they worked. We looked for recurring patterns and problems in work processes – patterns and problems that a new service or set of services could seek to build upon or address. With a better understanding of the end-users’ daily lives, we were then able to create concepts informed by the types of software and services already being used, the environments where work was being done, and the work practices of the potential users of the new services being designed.

By conducting a small number of contextual observations, we collected fewer overall perspectives than we would have in a focus group setting. However, we came to know each person we observed in much greater depth than a focus group could provide us. Designers like to know minute details about their target users, so that they feel they are designing for a real person and not a profile of a target market group. In the case of the project described above, the design team learned how users organised and decorated their desktops, how they filed physical and electronic documents, how they navigated from program to program, etc. By understanding a user or group of users at this level of detail, the designers were able to generate insights that responded to a real set of users’ unarticulated needs and aspirations. These needs and aspirations provide a valuable source of innovation because, before our process of discovery, they had *not* been articulated before.

In the focus group setting, participants do not have the contextual prompts available to us in our day-to-day existence, and must therefore recall their behaviour from memory. In the course of our field research, we have frequently observed that people do not do what they *say* they do; nor do they do what they *think* they do. There are many reasons why people’s opinions do not match their behaviour: they may be on automatic pilot whilst performing a task, they may be telling you what they think you want to hear, or their memory may not be perfectly accurate.

Whatever the reason, it is clear that observation of actual behaviour is much more effective than recitation of recalled behaviours. So much can be learned from seeing body language and other behaviours that people are either unaware of or have forgotten were interesting. For example, whilst developing a treatment program for children with diabetes, we visited families who were already dealing with the condition. We watched a mother administer an injection to her young son and saw the routines they had developed together. The way that the mother held her son’s hand whilst his arm rested on her leg was so intricate that it could not possibly be described verbally – it had to be witnessed as behaviour. First-hand observation of the relationship between mother and son reminded the design team to consider the emotional and psychological implications of the health condition in addition to the physical implications. With these insights, we created an aesthetic solution in keeping with the emotional tone of the parent/child interactions we observed. Needless to say, we would probably not have observed this behaviour during a focus group!

8.4 ASSIGN HOMEWORK BEFORE THE SESSION

One way to compensate for the relative lack of context found in the typical focus group setting is to ask participants to bring some context with them. By asking participants to bring something of themselves, they reveal at least some of their preferences, possessions, or everyday behaviours. For example, in a focus group we facilitated for a toy manufacturer, we asked children and their parents to bring in their favourite toys, and we began the session by having everyone talk about why they had chosen to bring in that particular toy (see Figure 8.1). As participants showed their toys to others in the group, we were able to learn the role of toys in their lives and what they valued about toys (as reflected in their choice of toys to bring to the focus group meeting). Similarly, in a project about handheld devices, we asked participants to bring in an object that they thought was pleasant to hold in order to learn what values and variables would apply to their assessment of the handheld prototypes we would be showing them later in the evening. The objects that participants chose to bring in also taught us a lot about their aesthetic preferences as well.



Figure 8.1 Asking parents to bring in their most and least favourite toy triggered memories and stimulated discussions amongst participants, and gave the design team specific and tangible insights into customers' value judgments about playthings for their children

In addition to asking participants to bring objects with them to a focus group session, we have found that asking them to perform an activity in advance can be an effective technique to prepare for a focus group. For an office re-design project, we asked participants to take pictures of key locations, objects, and interactions in their workplace. These images served as reminders or prompts of what was important to participants once they were away from the workplace setting, and helped focus group attendees to understand and respond to others' observations and insights as well.

Another useful preparatory activity is to encourage participants to keep a journal. In a project on mini-van interiors, we asked participants to keep a 'driving log' for a three-day period before the focus group meeting. They were asked to make note of the trips they went on, who rode in the car with them, their destination, how well the vehicle served their needs (for carrying passengers and people), and their emotional state during each trip. They then brought these journals to the focus group session, where the notes and records served to remind them of their experiences.

In each of these examples, a relatively open-ended (but carefully considered) homework assignment gave our participants the opportunity to study themselves, to reflect on their everyday behaviours, and to formulate a point of view about a design issue by focusing on it as they went about their everyday lives. Once in the focus group setting, participants could use their homework to jog their memories or to more effectively show others what they were referring to. As a side benefit, the quality of participants' homework assignments usually reveals who is most interested in, or even passionate about, the design topic; and, thus, who might have the most insightful contributions to make to the research. If more participants have shown up than you need (which is often the case since vendors routinely over-recruit to make sure they reach their participant quota), you can use the homework to evaluate the quality of insight from potential focus group participants.

8.5 DO NOT JUST ASK PARTICIPANTS TO TALK – GIVE THEM SOMETHING TO EXPERIENCE

Focus group moderators are really good at getting people to talk. In fact, the moderators with the best reputations in the industry are likened to talk show hosts because of their ability to fill a two-hour focus group session with non-stop conversation. We have found that whilst most people expect participants to talk during focus groups, specifically *non-verbal* activities can help participants 'articulate' an opinion about a design issue much more clearly than any amount of talking. This sometimes creates conflict with clients, who believe they are paying to hear people talk, and therefore object to any time participants spend *not* talking during a focus group session! For example, if you ask people to describe the right shape for the grip on a toothbrush, they will tell you it should be 'thick' or 'thin' or 'tapered' or 'straight.' Provide them with a range of prototypes of different grip sizes and shapes, blindfold them, and ask them to select the one that feels best to them, and they will give you much more refined and useful feedback.

Offering participants something tangible to experience during a focus group session leads to a deeper understanding of concepts and more spontaneous and therefore 'honest' reactions. Sketches and other visual stimuli are clearly a step in the right direction, but we have found physical prototypes to be the most powerful stimuli. It is easier to understand a product, environment, process, or message that can be held, walked through, or otherwise experienced through bodily interaction. It is also more satisfying for the participants (after all, they get to 'try' something) and more reliable for the researcher (who witnesses a physical response to something tangible, rather than a verbal interpretation of a concept described in words or pictures). In general, the more engaging the prototype, the more useful the information participants will be able to provide.

In situations where concepts have not been developed enough to create tangible prototypes, researchers can offer other tools to help the participant to communicate through non-verbal means. One such method we have used in the past involves the creation of collages. With this method, participants organise a collection of visual images and words (typically provided for them by the researcher) into some visual form that

conveys their interpretation of a given design concept or situation. This technique is useful when participants are being asked to express their understanding or point of view of an abstract question. For example, in an effort to better understand the role of music in people's lives, we asked participants to create a collage around that topic. By discussing which images they selected and how images were arranged in the collages, we were able to solicit very rich and concrete conversations about an abstract topic. After participating in such an activity, participants often thank us for helping them to articulate their point of view about an issue they had never before verbalised.

8.6 LET PARTICIPANTS TAKE THINGS 'HOME' WITH THEM

Just as it is constructive to ask participants to bring some of the real world with them to the focus group setting, it can be beneficial to have them bring a design concept introduced in a focus group back into the real world – for example, their home, workplace or vehicle. In this way, participants can see for themselves how the concept fits into their everyday environment, with an eye towards collecting insights about how the design could be improved for their unique needs.



Figure 8.2 When research participants took prototypes of a keyboard support into their work environments, we learned that what they *said* they desired differed from what the environment would support. With this insight, we were able to quickly alter our design focus

In one past project, our client had discovered that their customers wanted a keyboard support mechanism that they could install and move themselves, without the help of a facilities person. We developed prototypes of such a self-installable and adjustable concept, and sent them out with users to be tested in their actual work environments (see Figure 8.2). Once users began using the product, we quickly realised that being able to move the keyboard support once it had been installed was a feature that

users *thought* would be beneficial, whilst in reality most people had only one location to put their keyboard support. With this feedback, we quickly abandoned our efforts to create a feature that was quite expensive and in the end not very useful for customers.

One of our clients conducted focus groups around a new type of packaging for a milk-shake product. During the focus group, they asked participants to prepare the milk shakes (at the conference table, using plastic spoons provided by the moderator). When the moderator asked who in the family might like the new product, and when and how often they might consume the product, participants told the moderator what they thought would happen in their homes. Had they been instructed to take home samples of the product with a diary to record how they prepared the product, how and when they served it, and who ate which flavours, they would have learnt not what people said they *might* do, but what they *actually* did. In this way, they might have learnt that the containers did not fit well in the average freezer (suggesting the need for a different-size container); or that people preferred to drink from a glass rather than the paper cup that was provided (suggesting the potential for lower-cost packaging material). Such insights can only be gained by examining a concept in use in an everyday, real-world setting. Unfortunately, owing to the confidential nature of the project, we were unable to do such in-home evaluation at that stage in the design process.

When you cannot send a concept home with a participant (usually for reasons of confidentiality), a substitute activity involves asking participants to remember a concept after they have left the focus group room, and to test the memory of that concept within the context of their everyday lives. In one design project for an automotive manufacturer, we asked participants to make a brief audio note (we provided them with small handheld tape recorders) when they recalled the concept we had introduced them to during the focus group. Needless to say, the concept – a full-scale automobile – was too big to bring home! In a subsequent meeting, participants shared notes they had recorded – other vehicles on the road that reminded them of the concept they had seen; or cargo they were hauling around that weekend that would or would not have fitted into the concept vehicle. In addition, they recorded emotions that were triggered from memories of the concept vehicle, as well as the events that triggered these emotions. Although participants could not live with the actual prototype, they were able to introduce it into their lives and teach us a lot about how the concept fitted into those lives. This information helped the design team to refine the concept based on real-world feedback.

8.7 CONCLUSION

The context-enhancing methods recommended in this chapter are all geared towards transforming traditional focus groups into an activity that generates reliable, meaningful data for design. These methods create several challenges for the focus group moderator, because they require someone who can get participants to focus on actual, rather than desired or remembered, behaviour. This involves training the moderator to prompt for specific past instances of a behaviour, rather than a generic description of a behaviour. Other challenges to creating context-rich focus groups include the added cost and time needed to create and administer pre- or post-focus group homework tasks. The creation of ‘props’ (prototypes, everyday products, or visuals) to enrich the focus group experience also requires time and expense. In spite of the cost of these additional efforts, however, we have found them to be worth the expense because they provide the design team with a richer and more convincing view of the people for whom they are designing.