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In-Home User Research: Building Rapport Before & After Stepping Through the Door

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By [John Dirks](#)

In the past two years, Blink has conducted field research in over 500 homes in the U.S and internationally. While participants in these studies are often recruited through professional market research agencies with which they have a pre-existing trust relationship, we still find that many people feel nervous about letting researchers into their homes. In-home studies are far less common than focus groups, in-depth interviews, or usability testing at a facility, and the idea of a research team coming for a home visit can raise a lot of questions.

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Reduce the fear factor

To reduce worries about personal safety, we do all we can up front to familiarize participants with the researchers and in-home research process:

- We send an email in advance with names and photos of the visiting researcher(s) along with a link to our website. We describe who else may be accompanying us (sometimes this is necessarily vague like “a representative from the company who is sponsoring this research,” but even that is better than nothing.) The email also sets expectations about what will take place during the research session.
- We work in pairs. Both for the safety of our research staff and participants’ piece of mind, we conduct in-home studies with at least two people on the research team. Sometimes this is a researcher and a client observer, sometimes two researchers, and sometimes a researcher with an assistant. There is always plenty for two people to do, especially if you are recording the sessions. In unusual cases, we go into homes with three or more people from the research side, but we always set expectations accordingly.
- Balance gender if you can. Whenever possible our research teams consist of one male and one female.
- Some researchers make their own confirmation calls the day before the in-home visit. This helps make a transition between the recruiting agency and the research team.

Build on existing trust relationships

Many of the best recruiting agencies in the US and abroad have built relationships with the potential field study participants in their databases. Participants have likely taken part in previous studies at the agency’s own facility (sometimes too many studies, but that’s another topic), or they have been referred by someone they trust. Ways to build on these relationships include:

- We often introduce ourselves at the door by saying “I’m here for the <insert market research company name here> study,” as we find that participants identify most closely with the company that recruited them. We later explain the more complex company relationships and roles such as study sponsor, research company, and recruiting company.
- We sometimes employ a local field assistant from the recruiting agency. Many recruiting firms will provide a field assistant on an hourly basis, and not only can this person help with equipment and local knowledge, they can also serve as a bridge between the recruiting firm and the researcher. If you employ an assistant, don’t forget to budget time for training.

Be a good guest

Once at the home, act professional, quickly set guidelines, and be as transparent as possible.

- Present your business card at the door when you arrive.
- Offer to take off shoes in the entryway (do yourself a favor and buy slip-ons). Thank participants in advance and start a friendly conversation as everyone gets settled.
- Brief participants about everyone’s role, why you are conducting the research in homes as opposed to a testing facility, and set up ground rules such as how long you will be there, what you are using any photos and video for, and whether participants should keep the experience confidential.
- Don’t overstay your welcome. Manage time well; if you arrive late, avoid tacking on extra time at the end of the agreed-upon appointment unless the participant volunteers this.
- Practice and become efficient setting up and packing equipment in the home. Use a

checklist to make sure that you do not forget anything in the office, car, or hotel room and that you are ready to go soon after you walk in the door. Pack up as quickly as possible at the end of the session, again using a checklist to avoid forgetting anything. On one gear-intensive project, one of our researchers discreetly carried folded grocery bags in his field testing case in the event that participants needed to rush off before he had time to pack equipment away neatly.

Respect boundaries during the research session

Use good manners and coach any observers in advance about appropriate behaviors in participants' homes.

- Don't assume you have free rein in the home. Ask permission if you want to see something located in a different room or need to use the bathroom.
- Avoid getting too personal. It's never appropriate to mention the need for a computer upgrade or children's braces.
- Don't break things! Be prepared to open the wallet if what you are doing has the appearance of having caused damage in any way. Ten years ago my client and I spent four extra hours in a home with two enormous dogs rebuilding a participant's personal computer and home network that had failed while we were there, even though we knew our home network testing was completely non-destructive.

Treat every home visit as the unique experience that it is

Sure, the 27th in-home experience may not be as insightful as the first or second, but look and listen for something new every time and you might be pleasantly surprised.

- Recognize that it's OK to go off script sometimes. Interesting things happen in uncontrolled environments that can add enormous value to a user research project.
- Social dynamics and contextual details in participants' homes can be just as important to observe as specific interactions with a product or service. These things can't be replicated in lab or other controlled testing environments.
- Maintain the attitude that there is something new to learn from every person you meet and interact with; this will help keep your observations fresh and the work interesting. Regardless of a study's location, people become more engaged and forthcoming when the researcher is attentive and interested in what they are doing and saying.

While we may not be able to make all participants fully at ease prior to in-home research sessions, we have learned that taking some of these specific steps before and during home visits can help break down initial barriers, raise comfort levels, and ultimately lead to better research insights.