plusfour

Industry Survey on behalf of Research Venues

Dec 2025

POP

Power of Presence

Background: The Power of Presence

plusfour

Power of Presence

During the Covid Pandemic of 2020/21, whilst in-person research was completely suspended, viewing facilities came together as an Action Group. During 2025, the group has evolved from coordination into collaboration (the '**Collective**'), working together to further strengthen their sector.

The Power of Presence (POP) is the brainchild of iView with a healthy dose of AI and has been embraced and promoted by the Collective.

The Collective do not reject technology - like most in the industry, they **regularly use AI** to accelerate workflows and efficiencies.

Their point is that they see AI as a partner, not a replacement. It enables speed – but POP is about people bringing the soul!

The Collective believe that participants, moderators and researchers, feel and connect … noticing and understanding the things that data alone cannot.

The Collective & Evidence

The members of the Collective (linked here), have many positive stories to tell of why in-person research still offers wonderful opportunities for human insights, but **want to be able to converse with evidence!**

Plus Four Market Research Ltd (Plus4), as owner of The Qualitative Lab (London - Wimbledon) agreed to run a pro-bono industry survey for the Collective, seeking to understand current perceptions of face-to-face (F2F), online and AI-driven approaches, and to identify practical and attitudinal motivators and barriers for F2F solutions.

Any elements of this report that are published, should credit both POP and Plus4.

Methodology

In the spirit of POP embracing both AI and human-centered approaches, a first draft of the survey was created by external facility personnel, using AI. The experienced research ream from Plus4 then stepped in to **finalise the survey design** and ensure neutral questioning.

The survey was then scripted and hosted by Plus4's in-house team The Analysis Solution

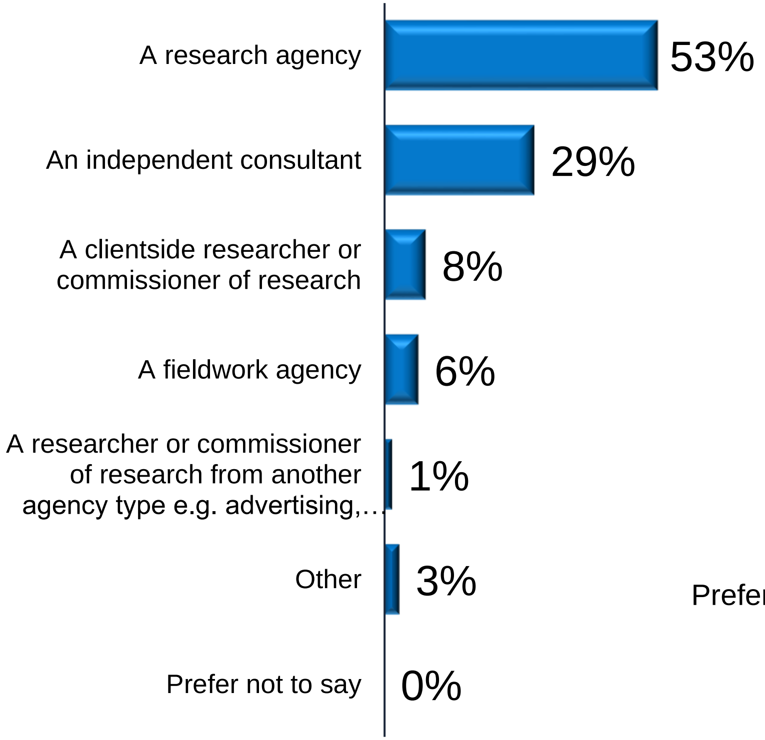
The Collaborative would like to thank the Association of Qualitative Research (AQR), the Insight Consultants Group (ICG) and the Market Research Society (MRS), who distributed the survey link to their members, and the Collective who also promoted the survey via LinkedIn.

This survey has been reported upon by Plus4 Director & Moderator Cara Allan, who has over 20 years' experience in both Qualitative and Quantitative research, and who embraces in-person research, whilst simultaneously being a fan of new technologies and AI.

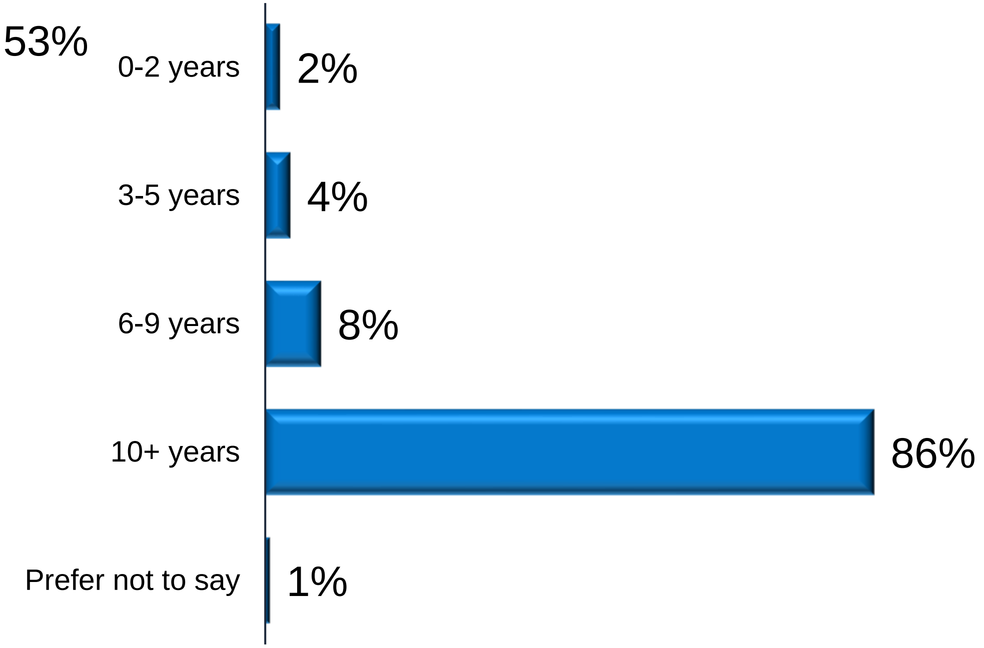
Though **Plus4 do not typically use AI for reporting**, to represent the POP ethos of valuing human input and simultaneously embracing AI, herein AI was used for charting (checked by humans), and for summarising verbatim feedback.

Resulting Profile

We received **139 responses**, 53% from research agencies and 29% from independent consultants, with just 8% clientside. The **vast majority (86%) have 10+ years' experience** in the market research industry. Almost all conduct Qualitative research; two-thirds conduct **both** Qual and Quant.



Are You:
sample size = 139
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025



Years Worked in Market Research:
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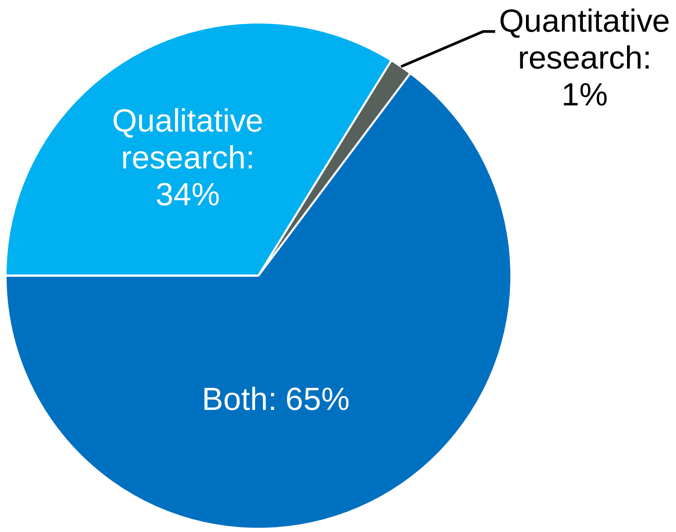
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025



Conduct Qualitative or Quantitative Research
sample size = 139
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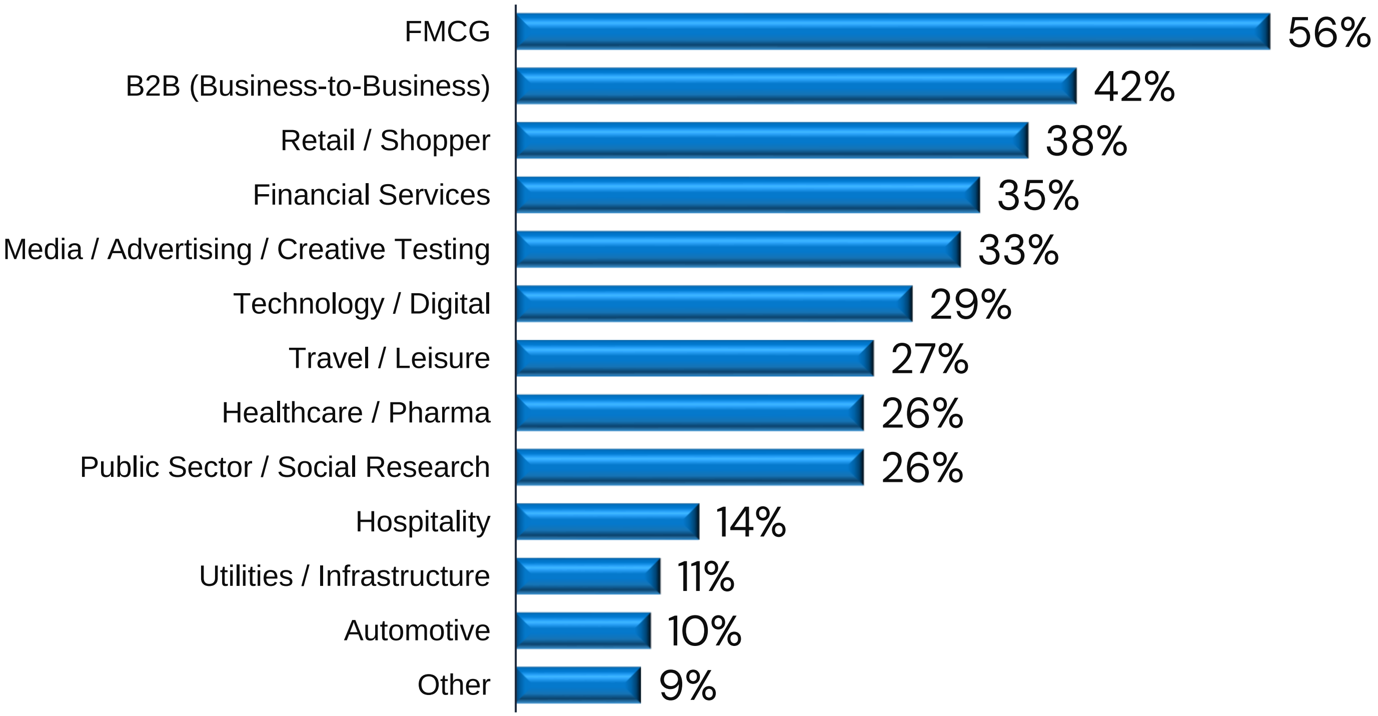
Main Research Sectors

We asked which industries represented 10% or more of the research undertaken in their business over the past 12 months …

We can see quite a **wide spread of industries are represented** by our survey participants.



Which industries have formed 10% or more of your research projects in the past 12 months? (Multi)
sample size = 139
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

We must see the results in the context of respondents who almost all already undertake Qual research, and who have engaged (albeit via industry association invites) with the POP industry survey *i.e. it could be argued they are perhaps already positively disposed towards in-person research?*

EXECUTIVE SUMMARY

POP

Power of Presence

The proportion of Qual being conducted in-person does not appear to be further reducing.

There remains a demand for research venues (more than a quarter using them frequently), albeit far lower than for online / digital Qual methods (three-quarters using them frequently).

Researchers are not simply using one or the other… frequent use of online / digital Qual methods is highest amongst those who are frequently using research venues.

The proportion (not volume) of **Quant** being conducted in-person is stable versus last year and expected to remain stable next year.

However, there is a net increase in the proportion (not volume) of **Qual** being conducted in-person versus the previous year and an expectation of a minor net increase in the year to come.

So, for Qual at least, has the shift to online / digital peaked? Are we in fact seeing a return to in-person, or will the increasing use of AI mean that we see another step change?

AI has made significant in-roads for design, transcription & analysis but has not replaced human moderators (yet).

Use of AI moderators is currently low… **for now, as an industry we are human-first as far as moderation is concerned.** Indeed, amongst the verbatim feedback we see for a few, a genuine fear that if studios disappear, young researchers will not learn in-person skills.

Conversely, we see **very strong adoption for AI transcription.**

We also see **significant take-up of AI at the analysis stage of a project**, especially for summaries or sentiment analysis (more so amongst those undertaking Quant as well as Qual).

When asked how else they use automation/AI, it was clear that it is being **used in very many ways across the front and back-end of a project,** covering idea-generation, desk research/context building, design of research materials, and analysis/reporting support, though some **concerns persist around confidentiality and accuracy.**

In-person/F2F is superior, and delivers better quality insights…

In-person/F2F research substantially outperforms digital/online collection methods when it comes to delivering better quality data and/or insights.

In-person/F2F research methods are clearly perceived as superior, indicating the greater use of online / digital methods is for reasons other than superiority i.e. it is ‘good enough’ or ‘sufficient’.

….but at what cost? Convenience and time matter even more than in the past.

Overwhelmingly, cost (including cost of extras) is the most dominant factor against conducting research in venues. Client preference also has a significant role. **Venues need to demonstrate value** - *verbatim suggesting this is especially the case where the client would not be in attendance.*

Speed/turn-around from kick-off to insights is also a barrier, with **venues needing to illustrate how they can compete on timescales** - *verbatim suggesting this includes, but is not limited to, recruitment.*

Verbatim did raise other **interesting areas for consideration** including a greater desire for daytime sessions (daytime recruitment easier for online sessions) and online involves lower costs than venues if there is a need to reschedule or repeat

The challenge is to demonstrate the clearly-perceived value to clients, so that 'good enough' research is not a good enough benchmark!

The feeling of being 'in the room' (inclusive of viewing) is described as **immersive, connected, energised and engaged**.

Most said they had made observations that had changed their interpretation of discussion i.e. the truth beyond the words, unguarded moments, and their experiences indicate richer interactions and creativity, as well as stronger moderation.

The handling of live stimulus (prototypes, tastings, creative materials etc.), is unsurprisingly the biggest motivator for conducting research in venues.

Other significant motivators include a greater level of observation/immersion including non-verbal communication, depth, engagement, connection/rapport, group dynamics and attention-levels (no at-home distractions, multi-tasking, not muted etc.).

Client preference also has a significant role, more so than moderator preference, though the opportunity to meet with the client and/or for the client team to be together is also a driver.

Other mostly logistical motivators explored were acknowledged as positives but were not as significant as those above, though verbatim did mention **increased professionalism as a driver.**

CURRENT SERVICE ADOPTION

POP

Power of Presence

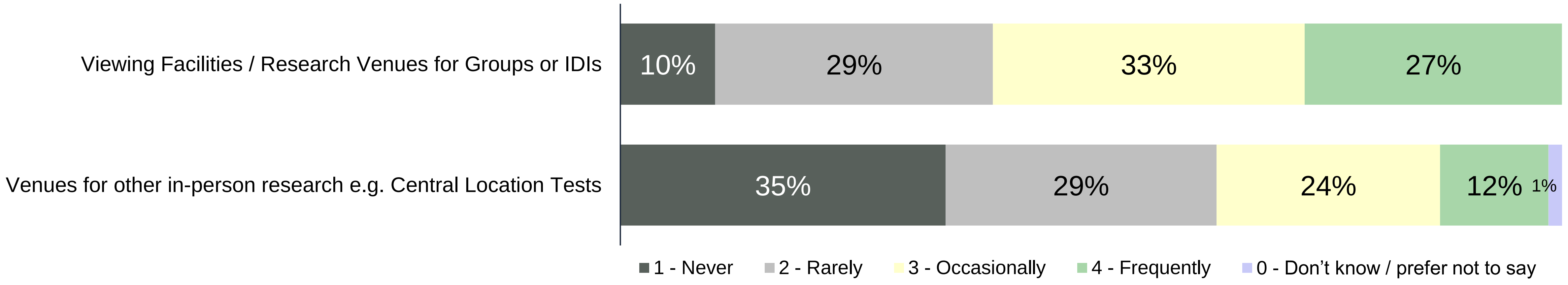
Venue usage past 2 Years

6 in 10 have been using viewing facilities / research venues **frequently (27%)** or occasionally (33%) over the past two years.

Just over a third have been using other venues for in-person research e.g. Central Location Tests/CLTs **frequently (12%)** or occasionally (24%) over the past two years.

Notably the use of venues is not significantly more or less frequent amongst those undertaking online groups/IDIs.

There remains a demand for venues for research albeit less than for online Qual (next slide).



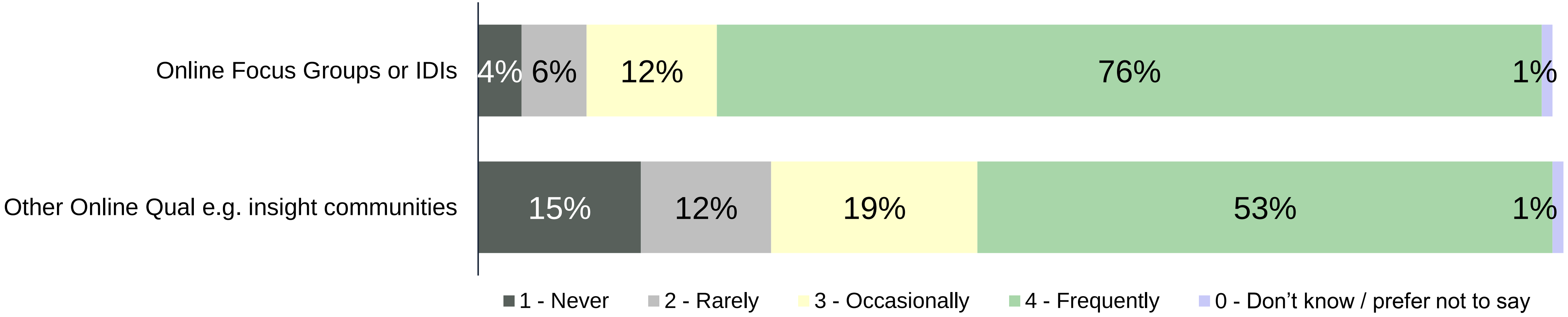
Used in Past 2 Years
sample size = 139
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

Online Qual usage past 2 Years

The majority have been undertaking online focus groups or in-depth interviews/IDIs **frequently (76%)** or occasionally (12%) over the past two years.

Clearly this is far higher than the numbers using research facilities. Notably, frequently conducting online groups/IDIs remains above 70% whether venue use is frequent or never.

More than 7 in 10 have been using other Online Qual methods e.g. insight communities **frequently (53%)** or occasionally (19%) over the past two years. And again, it is notable that frequently using Online Qual is highest amongst those who frequently use venues … perhaps suggesting that those doing more Qual, are doing more Qual of all types.

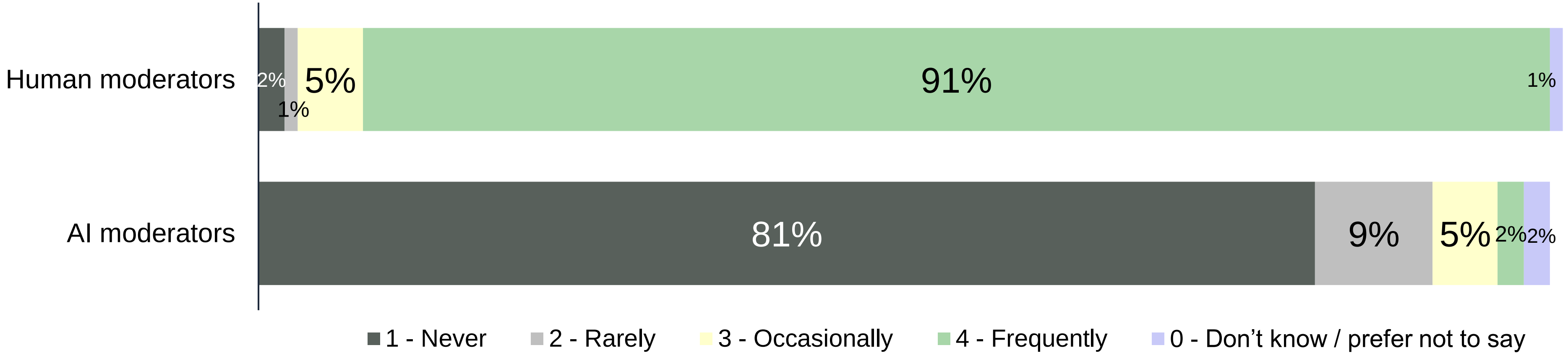


Used in Past 2 Years
sample size = 139
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

Human v AI Moderators

Most have been using Human Moderators over the past two years (**91% frequently**, 5% occasionally), whereas use of AI Moderators is very much still in its infancy (**2% frequently**, 5% occasionally).

Right now, this suggests some reluctance, or certainly a 'wait and see' approach given this is relatively new in our sector… certainly it is an area we might expect to see more growth in the coming years, but **<u>for now,</u> as an industry, we are human-first as far as moderation is concerned.**



Used in Past 2 Years
sample size = 139
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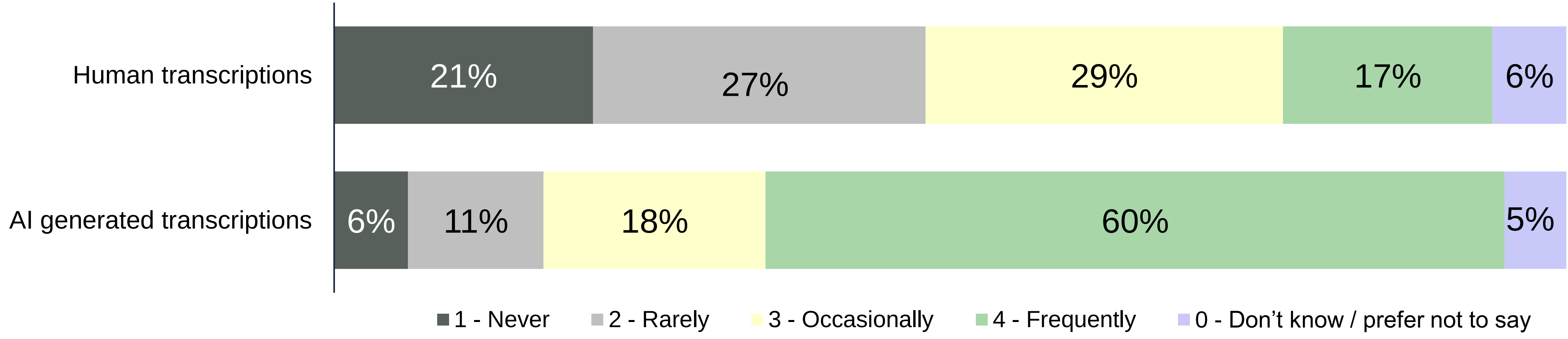
Human v AI Transcription

Almost half use human transcribers **frequently (17%)** or occasionally (29%) whereas more than three-quarters use AI transcription **frequently (60%*)** or occasionally (18%)… **this indicates a very strong adoption of AI in transcription.**

this indicates a very strong adoption of AI in transcription.

**though still 61% amongst frequent venue users, this rises to 70% amongst those frequently doing online groups/IDIs - we note that many online platforms incorporate AI transcription, from Teams/Zoom to research specialists*



Used in Past 2 Years
sample size = 139
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

AI in Analysis

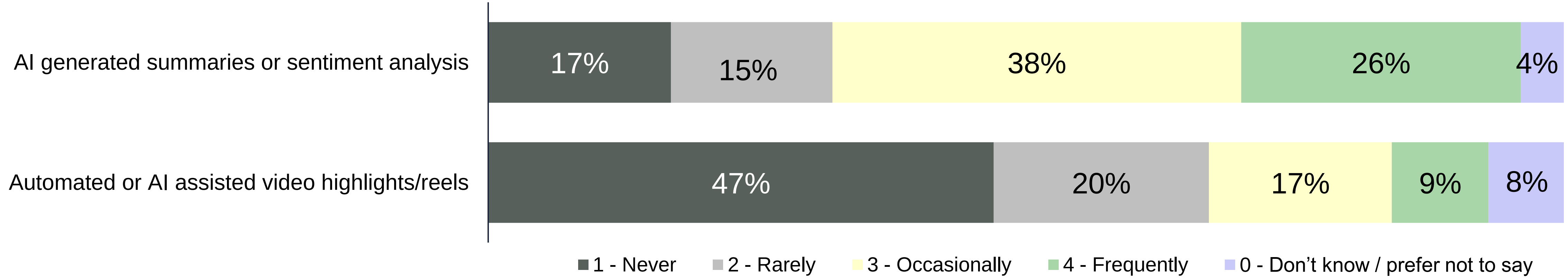
Almost two-thirds are using AI generated summaries or sentiment analysis **frequently (26%)** or occasionally (38%). 17%* say they have never done so.

**'Never' is highest amongst Qual-only respondents (34% 'never') and falls to 9% 'never' amongst those who do both Qual and Quant … suggesting it may be used more often for Quant than Qual OR that those who do Quant are more open to using it for Qual too*

Just over a quarter are using automated or AI-assisted video highlights/reels **frequently (9%*)** or occasionally (17%)

**'Frequently' is higher amongst frequent users of online groups/IDIs (11%), than frequent users of research venues (5%) … - we note that many online platforms facilitate AI analysis*

Whilst not as strong as for transcription, this indicates **significant take-up of AI at the analysis stage of a project.**



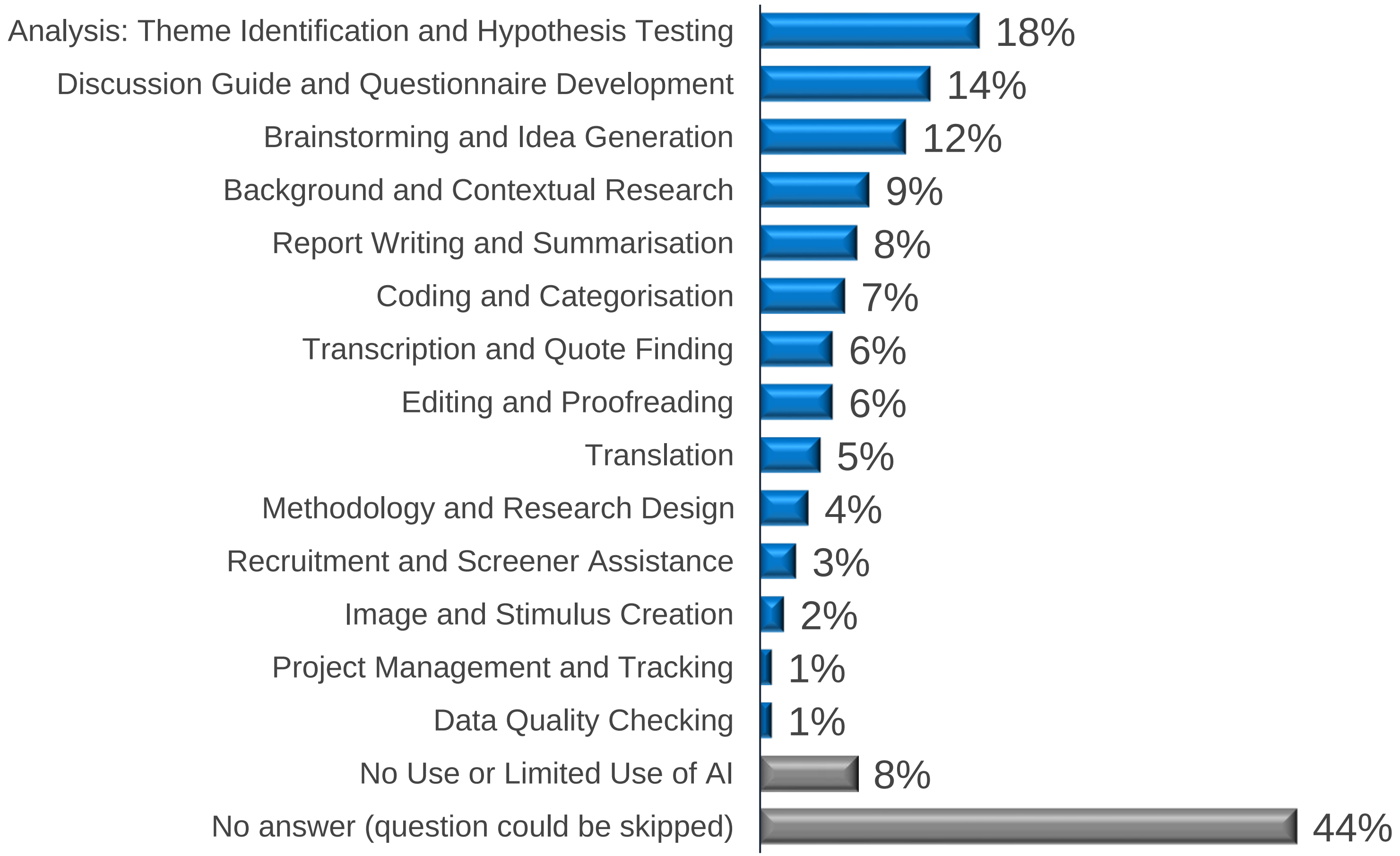
Used in Past 2 Years
sample size = 139
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

Users value AI / automation for supporting set-up …

(background and contextual research, brainstorming and idea generation, development of research materials)

…and for analysis time efficiencies.

(identification of themes, coding, transcription and quote finding, report writing and summarisation).



Other ways in which AI and/or automation supports research
sample size = 139
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

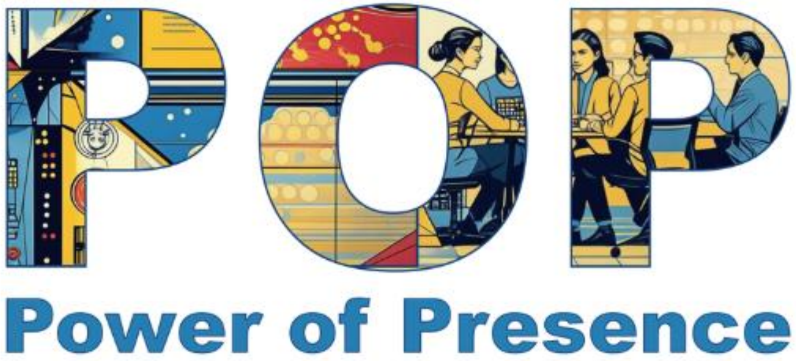
Following the Collective ethos, to use automation/AI where it is 'best fit' for the POP campaign, **we used research-specific software to automate thematic coding (see chart).**

We separately / additionally asked AI to summarise the human feedback.

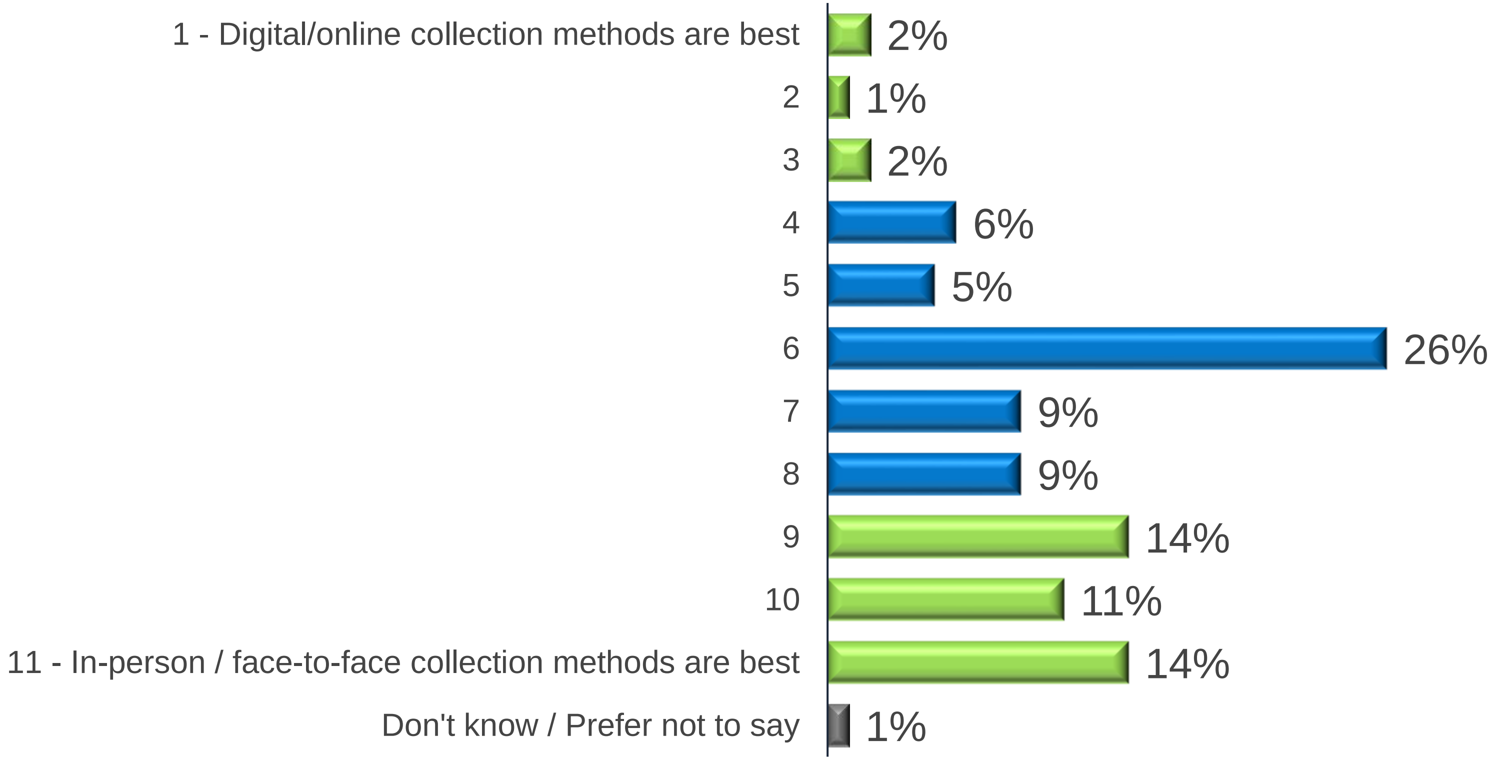
AI created the same core themes but summarised with specifics (retaining some of what can be lost in coding), and additionally identified a 'strong caution' against over-reliance on AI, noting human interpretation remains essential i.e. automation and AI are time-savers and thinking accelerators, but not a substitute for human judgement or insight. However, human/researcher review of the verbatim suggests that although concerns are certainly present, 'strong caution' feels like an over-statement – ironically, strength of feeling would be better explored Qualitatively.

Idea generation & thinking support	Discussion guides, surveys and screeners	Analysis support (with caveats)	Speed, efficient & automation	Desk research & context building	Writing, editing & comms.	Specialist/ emerging uses	Limited or no use
Brainstorming hypotheses, methodologies, discussion guide tasks and stimulus, tender concepts, proposal titles, awards submissions … acting as a thinking partner to stimulate thinking **– a thought starter or sparring partner not a decision-maker.**	Drafting and refining guides, questionnaires and screener, checking clarity and coverage (expanding codes, lists ad probes), checking alignment with research objectives … **used heavily in early-stage design and set-up.**	Thematic coding, summarisation, pattern spotting, quote finding, persona generation, preliminary sense-making, **supporting not replacing human interpretation.**	Transcription, translation (and/or back-translation for checking accuracy), tagging clips, summarising meetings, reports and previous research.	Rapid background research on markets, brands, trends and categories. Pulling reference materials, helping to understand unfamiliar topics quickly … **a starting point, rather than a final source.**	Rephrasing, proofreading, structuring reports, proposals and drafting client-facing comms.	Sentiment analysis, data-quality checks, automated **Quant** reporting (especially trackers), creating images/stimulus.	**Concerns persist** around confidentiality, accuracy and validation. **Quality varies** for deep qualitative analysis and translation.

BEST QUALITY DATA OR INSIGHTS?



In-person/F2F substantially outperforms digital/online collection methods for delivering quality data/ insights.



Perspective for Delivering Better Quality Data
sample size = 139
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

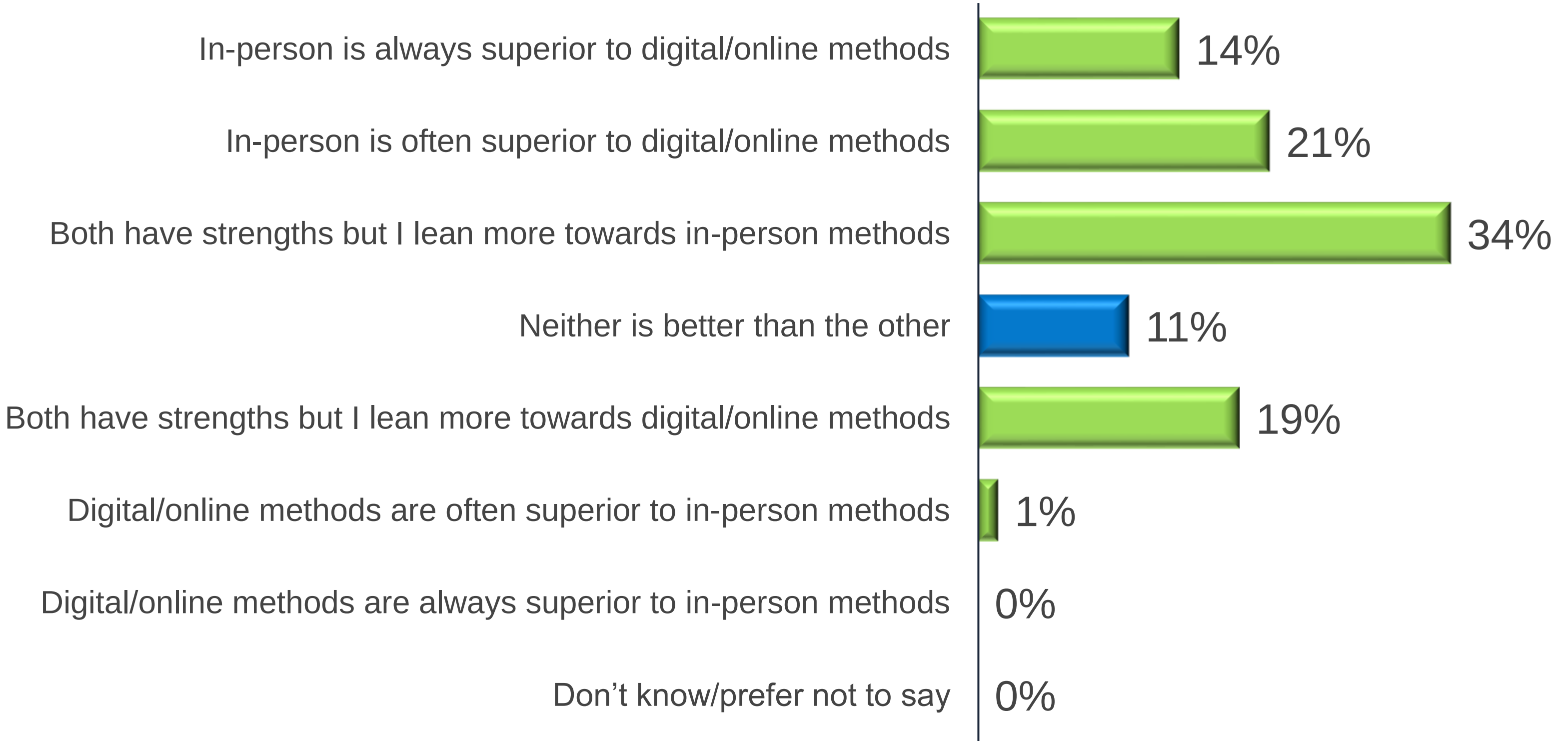
Almost 4 in 10 (38%) believe in-person/ face-to-face collection methods are better (last 3 on slider) than digital/ online when it comes to delivering better quality data and/or insights. *This rises to 47% amongst frequent venue users and is still at 33% amongst frequent online users.*

Only 5% say that digital/online is best (first 3 on slider). *This remains 5-6% whether frequent venue or frequent online users.*

This question is not restricted to Qual only.

This does never-the-less suggest that greater use of online is for reasons other than quality outputs e.g. cost, convenience etc.

In-person is clearly perceived as superior to digital/online methods.



Current Perspective on Research Methods
sample size = 139
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

All methods have an important role to play and can be applied or combined as appropriate, but never-the-less, it is notable that none chose not to answer the question i.e. they do have an opinion.

More than a third believe in-person is (**14% always,** 21% often) superior to digital/online methods... and similar numbers (34%) believe that although both have their strengths, they'd lean towards in-person (more than two-thirds in total).

Very few believe digital/online methods are superior to in-person methods (**0% always**, 1% often) .... though a fifth (19%) believe that although both have their strengths, they'd lean towards digital/online.

<u>This question is not restricted to Qual only.</u>

This again suggests that **greater use of online is for reasons other than superiority i.e. a 'good enough' decision:** *"F2F is great, but online is sufficient"*

BUSINESS LEVELS

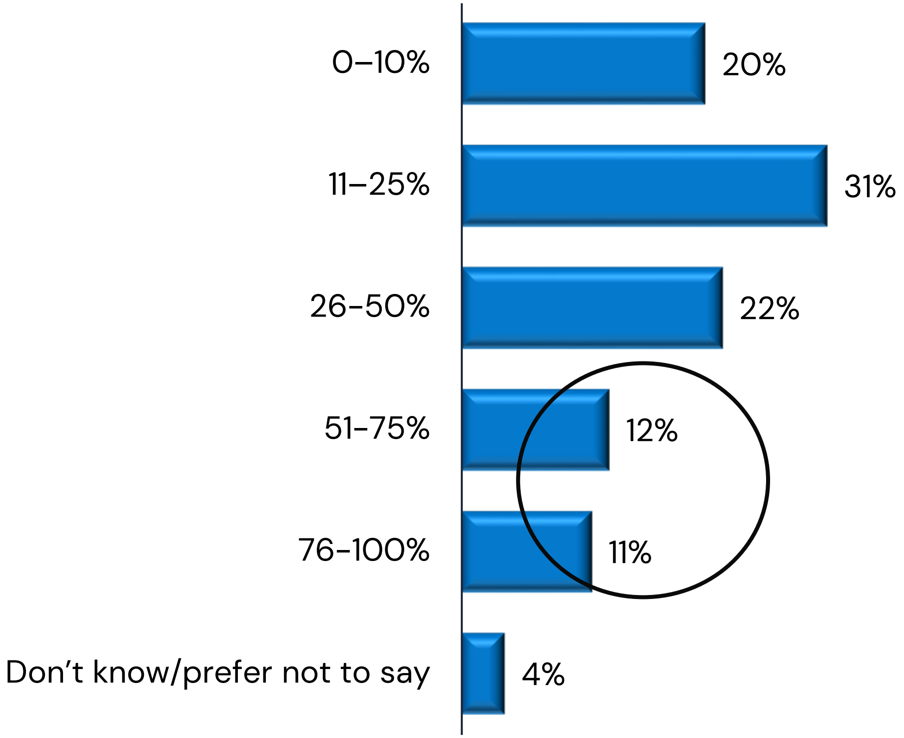
POP

Power of Presence

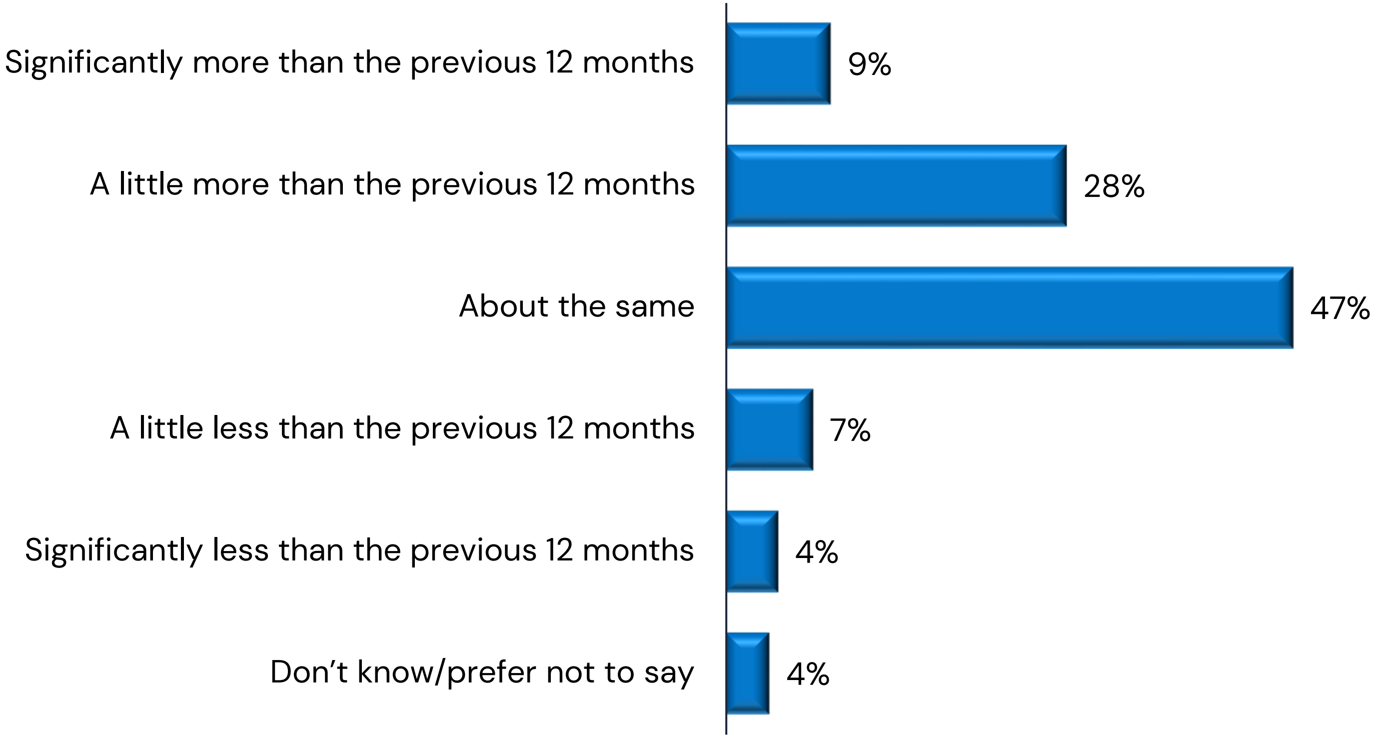
Just 23% say that more than half of their Qualitative research in the past 12 months was conducted in person.

Almost half say that this is about the same proportion (not volume) as the previous 12 months.

However, 37% identified an increase in **proportions** (not volume), and 11% a decrease … so a net increase in the proportion of their work being conducted in-person – *has the shift to online / digital Qual peaked, or will AI see another leap?*



Qualitative Research In-Person
sample size = 137 who undertake Qualitative research
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

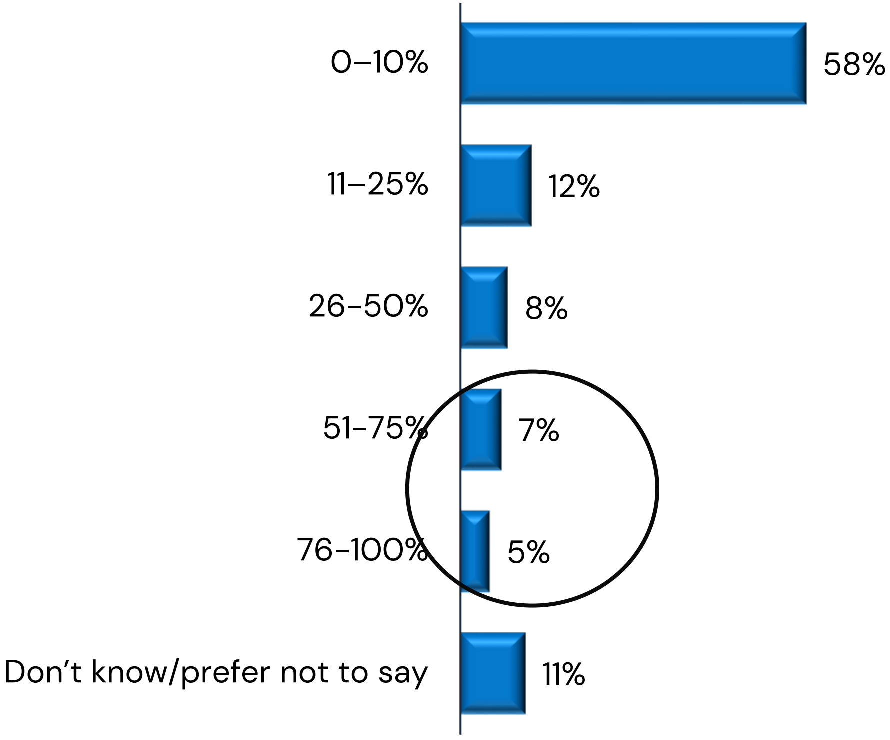


Qualitative Research In-Person
sample size = 137 who undertake Qualitative research
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

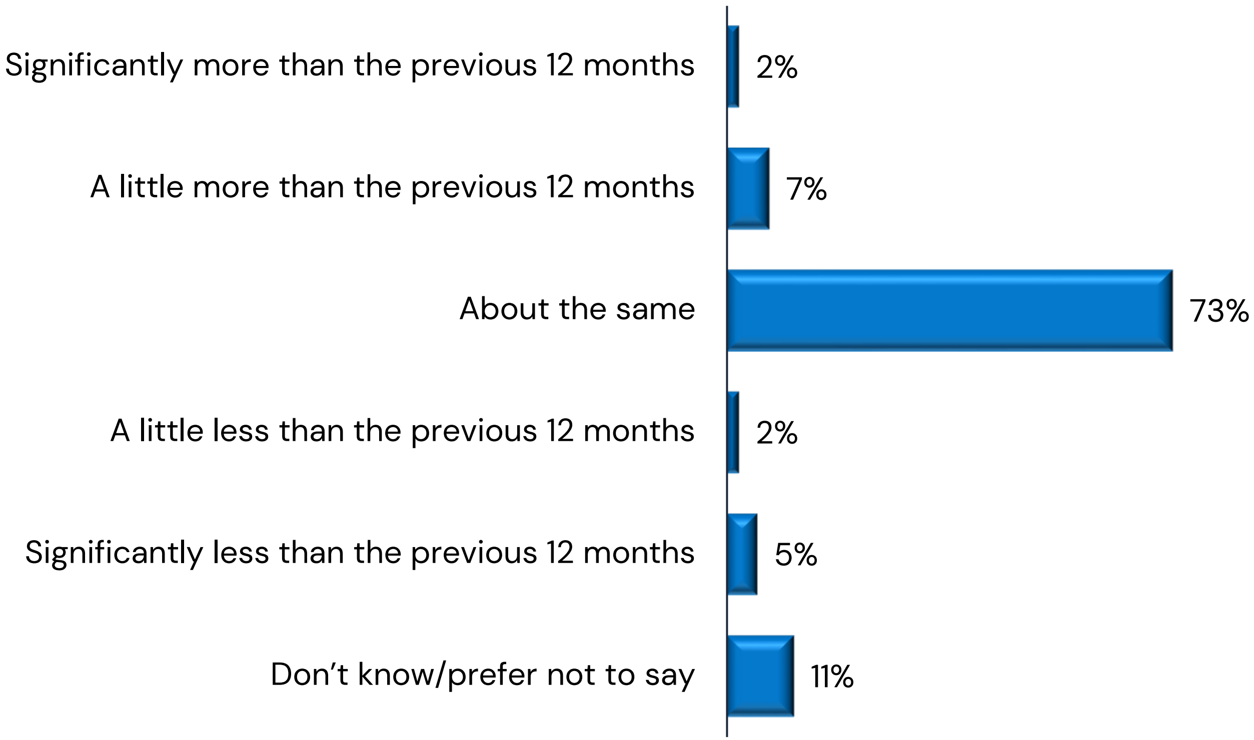
Just 12% say that more than half of their Quantitative research in the past 12 months was conducted in person.

For almost three-quarters (73%) this is about the **same proportion** (not volume) as the previous 12 months.

With 9% higher and 8% less… so the net position is the same … a greater proportion of Qual than Quant is still being conducted in-person.

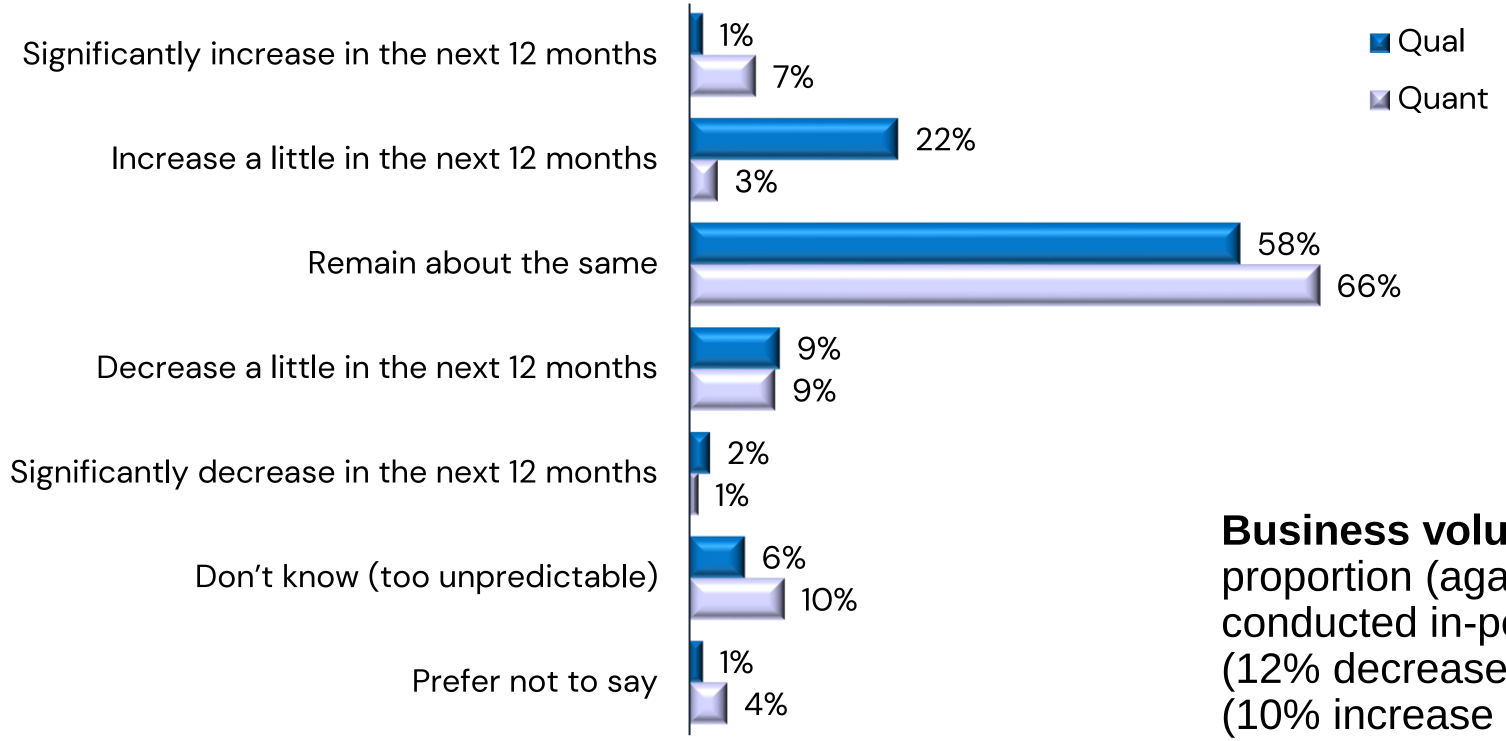


Quantitative Research In-Person
sample size = 92 who undertake Quantitative research
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025



Quantitative Research In-Person
sample size = 92 who undertake Quantitative research
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

Over half do not see the proportion of their in-person research changing in the next 12 months.



Qualitative / Quantitative Research In-Person
sample size = 137 / 92 who undertake Qual/Quant research
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

Business volumes aside, 23% anticipate that the proportion (again, not volume) of their Qualitative work that is conducted in-person will increase over the next 12 months (12% decrease), whilst for Quantitative work the net is zero (10% increase / 10% decrease).

This suggest **a minor shift towards in-person for Qual.**

BARRIERS AGAINST RESEARCH VENUES

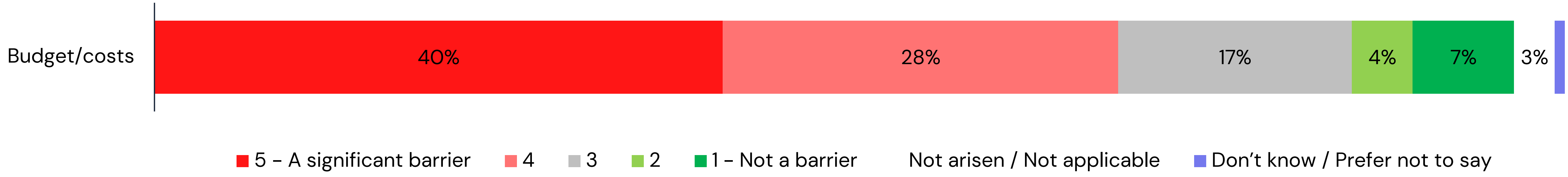
POP

Power of Presence

More than two-thirds say that cost is a barrier for conducting research in venues.

From a **prompted list**, budget/costs are seen as the primary barrier (68%*, 40% 'significant'). This highlights the financial constraints influencing the choice of research methodologies.

**'other' unprompted responses indicated this could be higher e.g. tighter profit margins, clients don't want to pay, high cost of add-ons (equipment, printing, refreshments, live-streaming), client using own space, can just use meeting rooms, if clients don't (want to) attend then the cost is harder to justify etc.*



PROMPTED Barriers to Conducting Research in Viewing Facility
sample size = 139
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

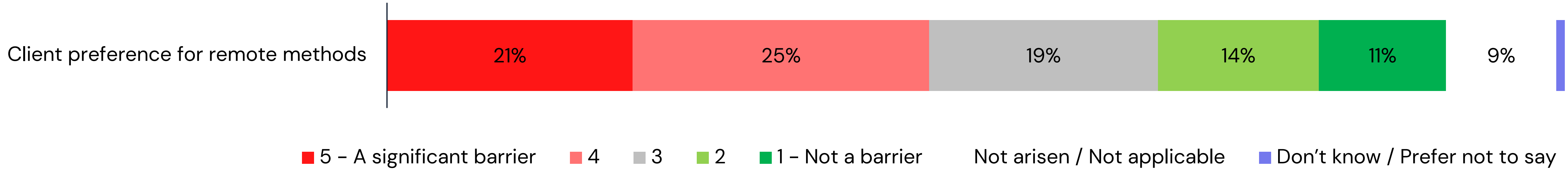
- Cost was more often a barrier for those who also conduct Quant research, and amongst those frequently conducting online groups and/or frequently using AI

Just under half say client preference for remote methods is a barrier for conducting research in venues.

From a **prompted list**, client preference for remote methods is a barrier for many (46%*, 21% ‘significant’). Research venues need to demonstrate why they are a good value option for clients.

Over a third say this is not a barrier and/or it has not arisen/is not applicable.

**‘other’ unprompted responses indicated this could be higher e.g. clients restricted from travel, clients don’t want to travel/attend, clients want to view real-time (inability to live-stream), client feels online is ‘sufficient’*



PROMPTED Barriers to Conducting Research in Viewing Facility
sample size = 139
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

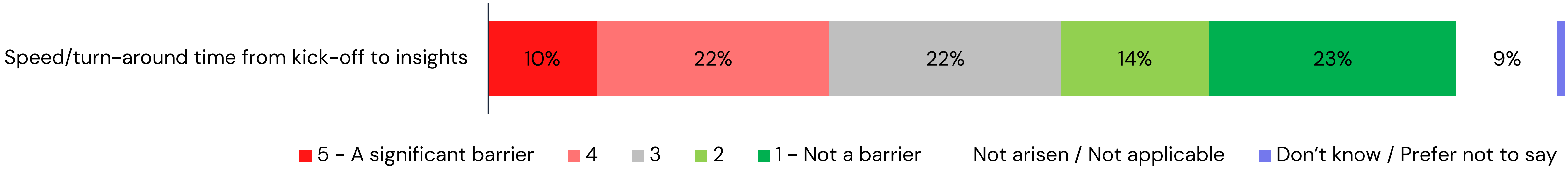
- ➢ Client preference for remote methods was more often a barrier amongst those using AI

A third say that speed/turn-around from kick-off to insights is a barrier for conducting research in venues.

From a **prompted list** speed/turn-around time is a barrier for 32% (10% ‘significant’). *Other unprompted responses indicate this includes - but is not limited to - recruitment time, suggesting panel recruitment is used more often for online/digital.*

Almost half say this is not a barrier and/or it has not arisen/is not applicable.

Research venues need to demonstrate how they can match online/digital methods for speed and/or highlight (as indicated by these survey results) that better-quality insights = value.



PROMPTED Barriers to Conducting Research in Viewing Facility
sample size = 139
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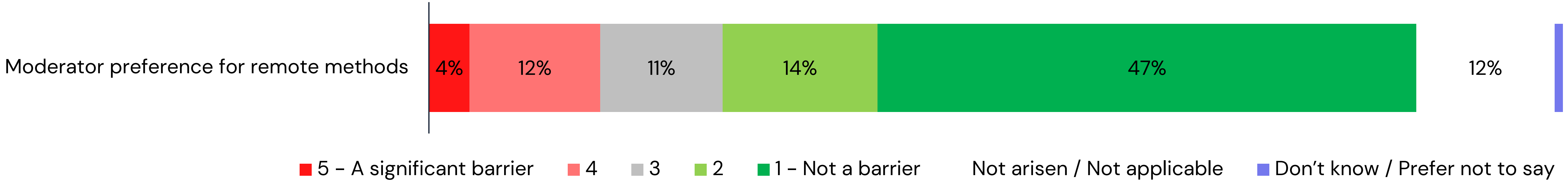
- Speed/turn-around was more often a barrier amongst those frequently conducting online groups and/or frequently using AI

Less than a fifth say moderator preference is a barrier for conducting research in venues.

From a **prompted list**, moderator preference for remote methods is a barrier for 16% (just 4% ‘significant’). Though not applicable for the majority (three-quarters say this is not a barrier and/or it has not arisen/is not applicable), research venues might consider how they can overcome moderator* barriers.

**‘other’ unprompted responses indicated this could be heavily influenced by work-life balance aspects e.g. travel time, recovery from travel etc.*



PROMPTED Barriers to Conducting Research in Viewing Facility
sample size = 139
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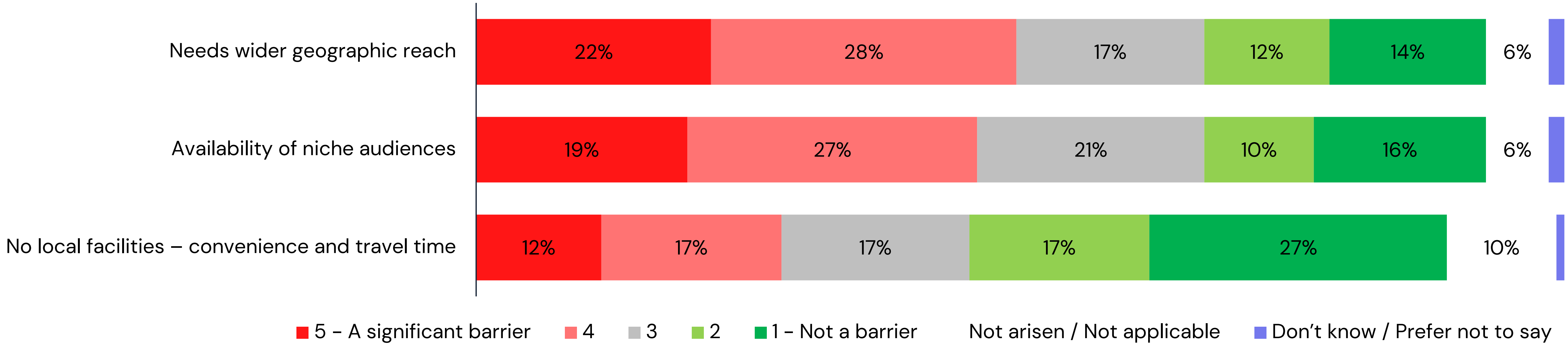
Venues will never be able to overcome certain barriers: online research has always been advantageous for mixed geography groups and niche audiences.

Certain elements have always understandably been a barrier for in-person research e.g. needing wider geographic reach, recruiting niche* audiences (needing nationwide access to do so), no local facilities.

**'other' unprompted responses indicated 'niche' includes B2B and sensitive topics*

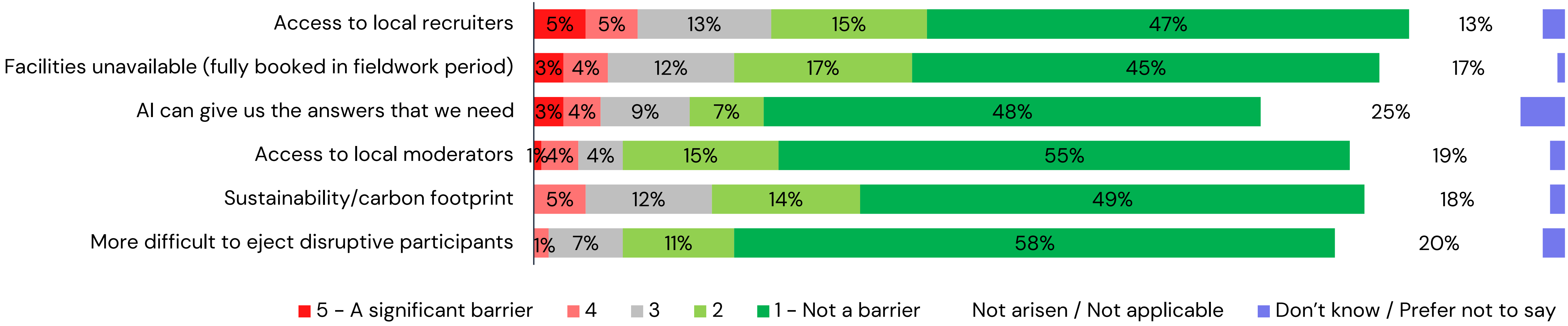


PROMPTED Barriers to Conducting Research in Viewing Facility
sample size = 139
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

Most other prompted barriers were not significant, but some unprompted barriers highlight other issues…

In general, they do not believe AI can provide all the answers, they can access local recruiters and moderators, facilities are available, they do not see participant behaviour as a deterrent, and sustainability is not a factor in choice.

Further **unprompted barriers** <u>not already covered by the prompted topics</u> included mostly low count mentions: greater push for sessions to take place during office hours, online easier for daytime sessions, greater no-show levels/respondent ‘laziness’, attendance from ‘groupies’, easier/lower cost if need to reschedule (either before due to recruitment difficulties, or after due to show levels), greater engagement and/or interaction with client online, lack of convenient parking (outside London), scruffy environments (worn/tired), and importantly, accessibility.



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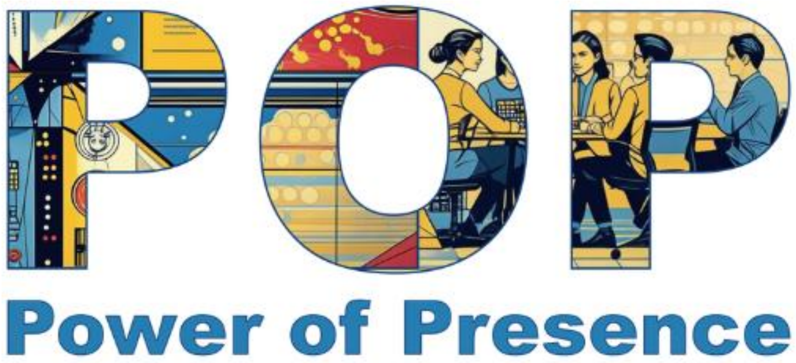
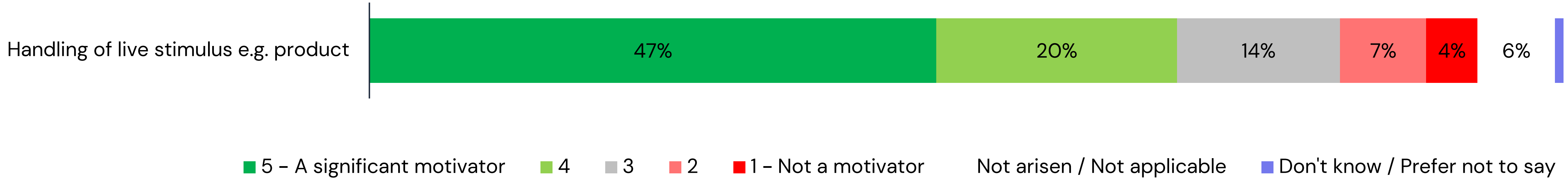
MOTIVATORS FOR RESEARCH VENUES



Two-thirds indicate that the handling of live stimulus is a motivator for using research venues.

From a **prompted list**, handling live stimulus is seen as the most significant motivator (67%*, 47% ‘significant’).

**‘other’ unprompted responses indicated this could be higher e.g. when there is a need to see/handle product of packaging, complex stimulus to explain/show etc.*

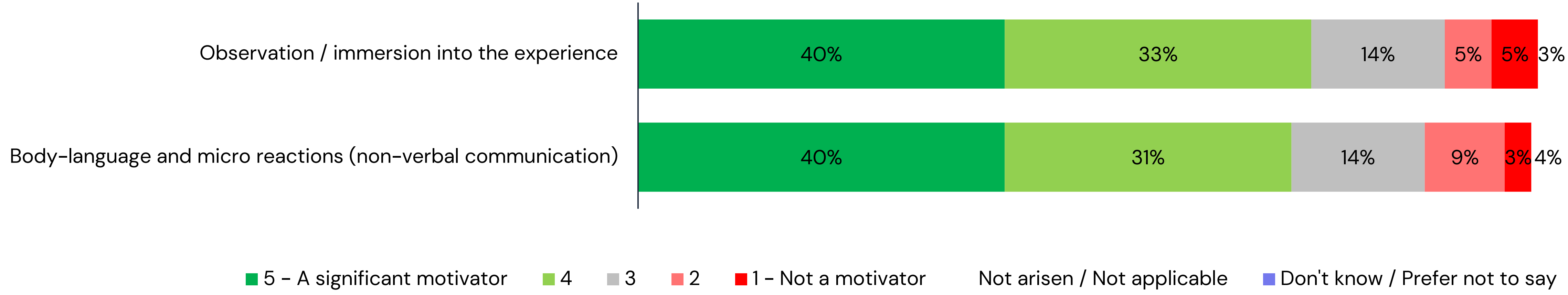


PROMPTED Barriers to Conducting Research in Viewing Facility
sample size = 139
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

- Unsurprisingly, greater amongst those frequently using research venues

Around* 7 in 10 are motivated (4 in 10 significantly so) by a greater level of observation/immersion incl. non-verbal communication at research venues.

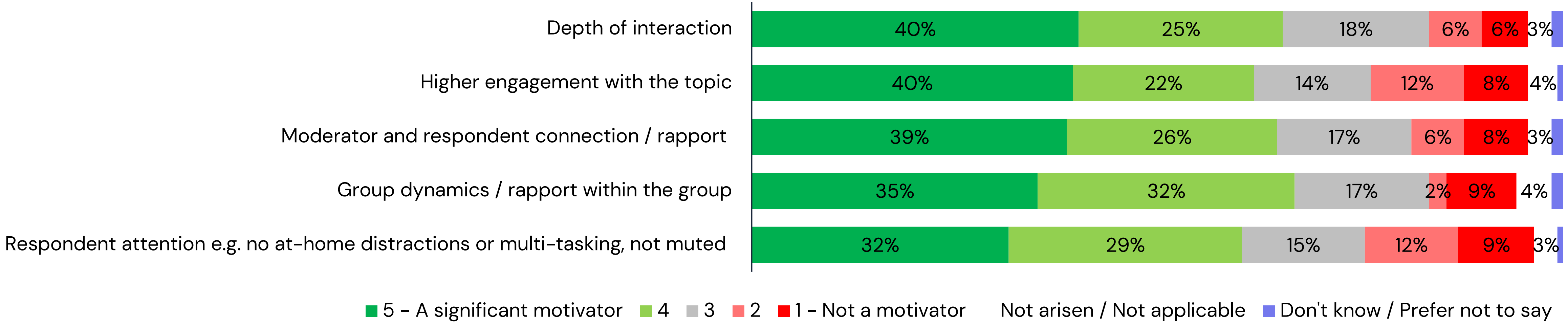
**'other' unprompted responses indicated these could be higher e.g. non-verbal cues, immersion without distractions (clients, moderators, respondents) etc.*



PROMPTED Motivators for Conducting Research in Venue
sample size = 139
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

Around* 6 in 10 are motivated (3-4 in 10 significantly so) by depth, engagement, connection and rapport, as well as attention-levels/ lack of distraction.

*‘other’ unprompted responses indicated these could be higher e.g. better discussion, better engagement, better interaction, depth of response, depth of insight, energy in the room, stilted on Zoom, empathy is easier in-person, keeping focus is better in-person for longer sessions, better for certain methods e.g. mapping, observation, idea generation, creative workshopping etc.

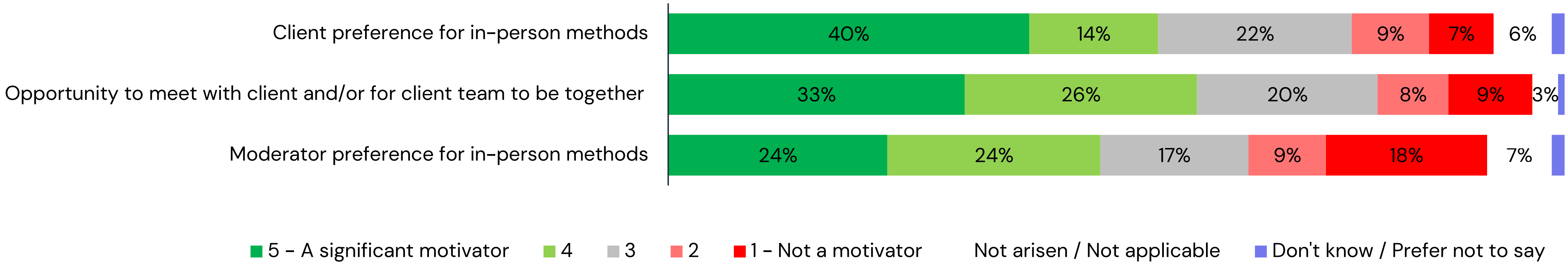


PROMPTED Motivators for Conducting Research in Venue
sample size = 139
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

- The depth of interaction, moderator/respondent connection and rapport, as well as group dynamics/rapport, are all greater motivators amongst those frequently using research venues

Between 5-6 in 10 are motivated (2-4 in 10 significantly so) by client and/or moderator preference for research venues, and the opportunity to bring the client team together.

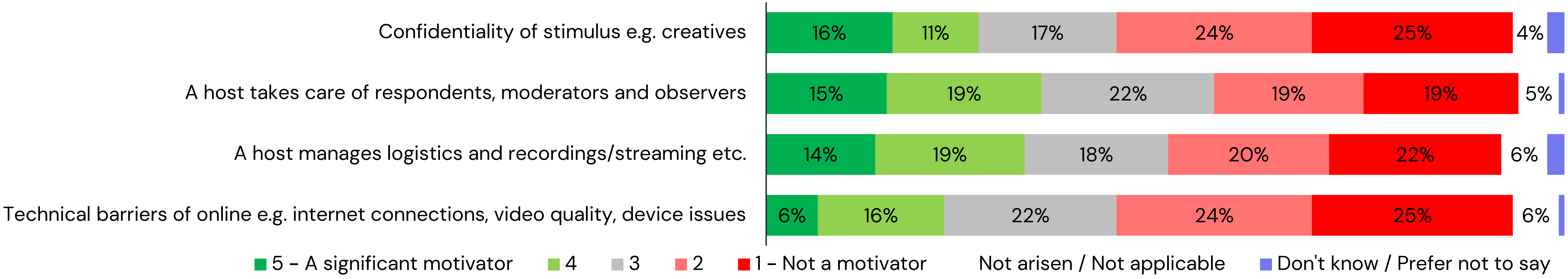
**'other' unprompted responses indicated these could be higher e.g. client viewing, moderator on-site/fully engaged between groups, great for initial kick-off/first night with client, small-talk with the client adds to the relationship, fast download with the client at the end of the groups, avoids constant client questions (as experienced online), getting away from the office/desk, job satisfaction, enjoyment/fun etc.*



PROMPTED Motivators for Conducting Research in Venue
sample size = 139
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

➢ Client preference for in-person methods is unsurprisingly a greater motivator amongst those frequently using research venues

Logistical aspects such as confidentiality, hosts (for managing people and equipment), and avoiding technical barriers, are not as strong motivators as other aspects, though still relevant.



PROMPTED Motivators for Conducting Research in Venue
sample size = 139
Plus Four Market Research Ltd / POP: Power of Presence Survey 2025

Further **unprompted motivators** <u>not already covered by the prompted topics</u> included easier facilitation of documents/signatures e.g. NDAs, space/flexibility to move around the room and increased professionalism.

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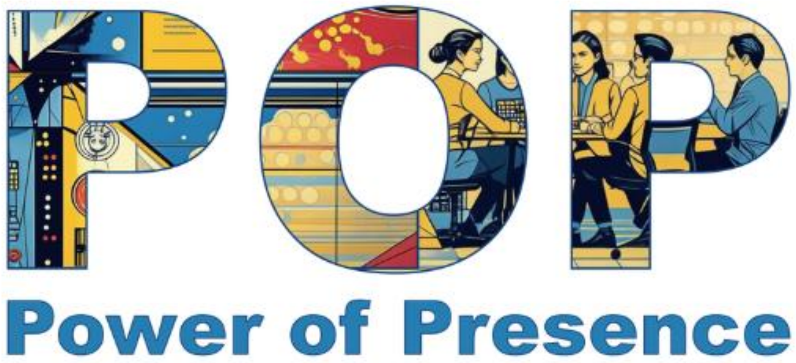
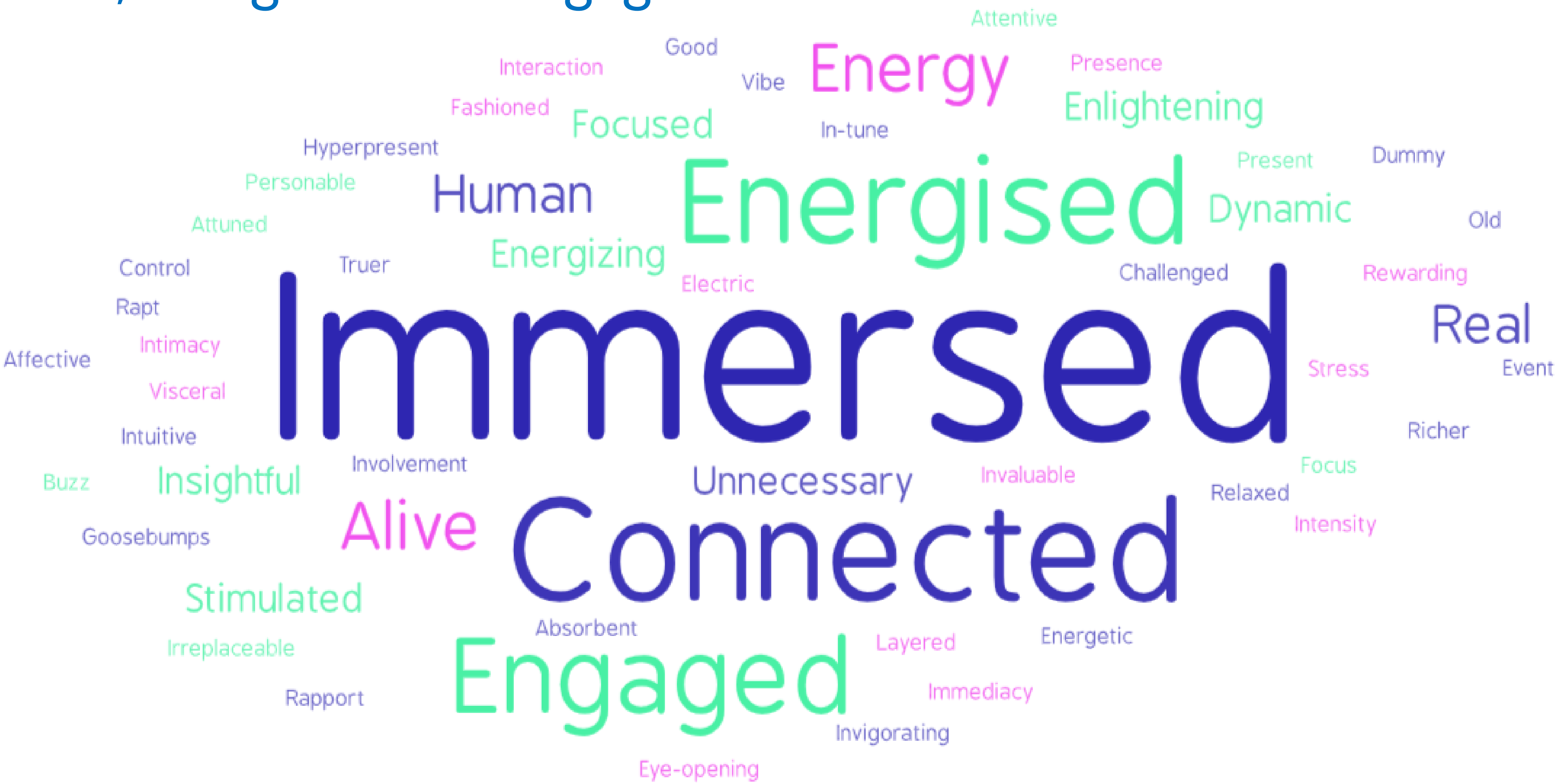
BEING IN THE ROOM…



When asked to describe the feeling of being 'in the room' (in-person) in one word, the most common mentions are: immersed, connected, energised and engaged.



Look, there are clear advantages on occasion for using F2F vs online, but I feel the rationale is flimsy and unproven, or not significant enough and it is reflected in some of the questions here ... I'd like to see more scientifically designed experimentation between the two methodologies. I believe both have a role, and it is often complementary, but I think there is a defensive mindset amongst quallies, and obviously amongst venue operators about proving a value for F2F and viewed-specifically that is potentially false.

We can understand this perspective. However, this **final 'in the room' section** of the survey, was included specifically to gather evidence as to if, how or why in-person research may offer an advantage over other approaches.

When asked, **73% told us they had observed something in-person at a venue, that had changed their interpretation of the discussion/interview** e.g. body language, group dynamic, off-script moment.

Stories of these moments are shown in Appendix A, but **we asked AI to sum-up the human feedback** and it pulled out key themes shown on the next slide.

You can see the truth beyond the words.	Energy in the room is a data source.	Richer group dynamics and creativity.	Deeper disclosure on sensitive topics.	Better stimulus testing and 'say-do' insight.	Stronger moderation and faster pivots.	Insight happens beyond the formal session.
Hesitation, discomfort, enthusiasm, social pressure, politeness or conformity show up immediately in body language, facial expressions, silence, posture and energy in the room. These signals are often the insight itself - and are largely invisible online.	Moderators and clients can literally feel when an idea lands or falls flat. Moments of excitement, confusion, boredom, resistance or revulsion are unmistakable in person, while even the best online groups tend to flatten emotional response. The absence of energy is often as telling as what's said.	People connect faster, build trust more naturally and think more creatively when sharing a physical space. Conversations flow more freely, respondents spark ideas off one another, and breakthrough moments emerge organically - including those powerful "mic-drop" moments where a shared truth is articulated with conviction.	In-person settings create safety and empathy that encourage honesty, especially around socially sensitive or emotional subjects. Moderators can respond sensitively to non-verbal cues and gently probe when something feels unresolved - unlocking insights that participants may not share, or recognise, online.	Handling products, tasting food, opening packaging, reacting physically to designs or creative work reveals instinctive reactions that words alone can't capture. Initial facial expressions, hesitation to touch, or spontaneous physical behaviours often determine success or failure - and these moments disappear in digital environments.	Being in the room better enables moderators to manage dynamics, control external distractions, bring quieter participants in, limit dominant voices and adapt in real time. Research/client teams can read the situation, refine stimulus, and pivot between sessions more quickly and confidently than in online set-ups.	Some of the most valuable moments happen before, after or between sessions: side conversations, comments as people leave the room, informal chats over breaks, or participants continuing to discuss ideas once the "recording" stops. These unguarded moments don't exist online.

We asked **what would help make in-person Qualitative research more appealing,** including to end clients…

We used research-specific software to automate thematic coding, but it lost all of the nuance behind the feedback (see Appendix B for original verbatim). **We asked AI to sum-up the human feedback** and it pulled out the key themes shown below and told us that in-person is more powerful, more truthful and more impactful **BUT** too expensive (making it hard to justify), and the benefits are weakly articulated to clients.

In-person qual is not seen as inferior – it is seen as better.	Cost is the dominant factor – overwhelmingly so!	‘Good enough’ outputs from online, mean that clearer proof of value needed	Convenience, time and logistics matter more than before.	There is a desire – even an anxiety – not to lose in-person Qual.
			Less tolerance for travel and out of hours sessions.	Fear that studios will disappear and concern that young researchers will not learn in-person skills and even more than that, a fear that Qual will be squeezed out by AI and at-scale alternatives. There is a strong emotional defence for in-person research.

… there are also a minority of ‘in-person Qual is dead’ comments too.

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APPENDIX A
'IN THE ROOM' STORIES

POP

Power of Presence

Interesting conversations during 'breaks' eg lunch at a full-day workshop. These more informal chats can often spark more lively debate when we come back together for the rest of the session.

Sometimes what the participants say is very different from what their body language is saying - for example they might be saying they like a certain concepts because they're going along with the group. I'm not sure I'd pick up the hesitation in their body language online

Testing some new mocked up designs of mobile phones, there is often one model absolutely no-one wants to pick up in any group. In some way they are simply plug-ugly in some way and no-one would want to be seen dead with them let alone pick them up no matter how good the performance or features were. That has happened for several different clients in different markets and with different designs. Either I or the local moderator followed up in each case to establish the reasons but it was fascinating to see the initial physical reaction - in one case absolute revulsion! Thank goodness they tested them...

We were testing a new product and the ability to taste the products in face to face groups was vital as we identified through tasting and interaction with the products how the communications and brand positioning needed to be optimised.

Yes when the group was saying one thing but the energy in the room was saying something else. I checked this using one of our unique movement based methods and this completely turned around an overall finding

There are lots of examples of this, a sense of energy in the room when a particular topic is raised - how people are excited or sit back more hesitant to speak can give a really good idea about how interested or engaged they are in a topic. When I run political focus groups, it's really noticeable how people can either switch off or really get engaged by something - you can definitely feel the vibe in the room.

Facial and bodily expressions in response to stimulus of different kinds that would be missed online plus lots of conversation that takes place after the 'official' end of the session where participants chat amongst themselves for a bit or even with the client at the end

Greater, richer insight because sessions can go on longer, participants more engaged, clients more engaged

Did a session about political views and discussed some important areas and was interesting to observe tolerance through body language that might have missed online

Just the general ability for the moderator to explain things to the participants / clarify issues / keep everyone on brief. It works much better in person.

Can't think of a specific example... but you get much more of a sense of when something doesn't connect (e.g. an ad, brand idea) from feeling the energy (or lack of energy!) in the room - and so does the client.

Exploring deeper shared truths, and respondents opening up, doesn't happen online anywhere near as effectively.

A study for a fast food chain: we realised that there was a sensual/erotic dimension to the brand that was ….surprising…

Moderated a group where we had done extensive online diaries and something emerged in the groups that at no point was present in the diaries.
If we're conducting in-person research with stimulus and the stimulus doesn't land with the participants, then it's much easier to amend with our stakeholder in the backroom ahead of the next group/IDI. It allows us to pivot quicker and more efficiently!
I was interviewing a black woman in her home and when we mentioned safety she froze for a moment and then gave a neutral answer. I was sensitively able to prompt further and she shared some really emotive experiences of marginalisation and her worries for her son. No chance that would have come out online.
Sub group creativity is far better in face to face environments. It is extremely difficult to get to know someone in a short time in an online environment. In a face to face environment people work together much more quickly and creatively.
Mainly from being able to handle products / packaging, when people notice things they would only pick up on in real life. Also just some of the conversations that go on in breakout groups or when moving between them that wouldn't happen in an online setting.
Participants getting teary-eyed when I read them a narrative script for an ad.
People admitting things in person that they wouldn't admit online e.g. issues around domestic violence in Kenya, women admitting that they drink whisky Or just general body language (e.g. the "yes I like it" but with arms folded moment)
Conversations with moderator after interview ends and leaving the building. Overhearing participants continue talking about the idea together now not on record.
Often just as you get up to leave the room the participant will say something important they didn't mention in the room. These details are missed online
Being able to read the room and work out that the one negative respondent has something else going on, it's not a response to the stimulus. I get a really clear intuition about a group and 'feeling' about the direction of the data, that is hard to get online. I've done taste testing online and in person and in person you can pick up so much more of the unspoken
Non verbal communication is vital to indicate the conviction with which respondents assess stimulus materials and whether they are expressing honest or just polite opinions on topics with social values such as healthy eating or buying organic foods.
In a group scenario you can more easily see in-person if a respondent is becoming disengaged and withdrawing from the discussion, and also can more easily minimise one person monopolising the conversation. But we mostly conduct IDIs so this is not a current issue.
Participant energy in response to new ideas is everything. And you don't get a clear read of this online.
A group of Gen Z people bonding with each other as they talked about music. It was a finding in itself.
Mainly the say / do gap when interacting with product prototypes / initial facial expressions when presented with stim.

For creative tests the nuance in facial expression and body language is so important - very difficult to pick this up on Zoom!
This has happened many times. The conversation has built up to a certain point with respondents getting more and more immersed in the subject. Then at some point, one person articulates what everyone else is thinking and does so with complete conviction and authenticity. The whole debrief is sometimes in that quote. It rarely happens like that online as there isn't the same build-up of intensity.
it's usually the discussion/interaction between respondents themselves, which is not possible online.
A conversation with people who were supposed to be rejectors of a retailer but turned up and seemed oddly positive - but being in person gave me the 'mic drop' moment that showed that people's FEELINGS about the retailer were completely at odds with their actual usage of it. Not sure I'd have had that moment in an online group - and it was a really powerful moment for the client.
Quiet respondents are easier to coax to speak up when in-person. If online they are more likely to say don't know and not willing to talk up.
Participants all examining some creative in more engaged way e.g. putting their reading glasses on, shifting in their seats, leaning forward.
It's the nuance of detail that is hard to articulate, but where you can see someone's facial expression which clearly tells you they disagree with what someone else has said or the free flowing nature of the conversation that allows you to go deeper into the issue than you might ever get to online. You can see how much ore enjoyable it is for participants in person versus online and how they have genuinely enjoyed spending time in the room with the other participants
Very sceptical respondent's realisation that people-stories at heritage attractions are more about the (very well-researched) "gossip" rather than boring old school history lessons full of dates and people they neither knew nor cared about. Delighted clients were almost clawing the glass of observation window to get into the studio - the participants "got" what the clients were trying to achieve.
I think the group dynamic element is always somewhat different when you're with people in a room versus online.

It's a more general point: in an online group participants say they might like a new product or idea but you can never be quite sure of the energy as even the most dynamic and chatty online groups have a slight flatness to them whereas you can always sense how a new product or idea is going through the energy and how it ebbs and flows in a face-to-face group

Multiple times, seeing and feeling the nature of the silence / lack of reaction to ideas that aren't grabbing people. The body language and looks participants give each other is key.

Respondents sitting forward due to stim being revealed.

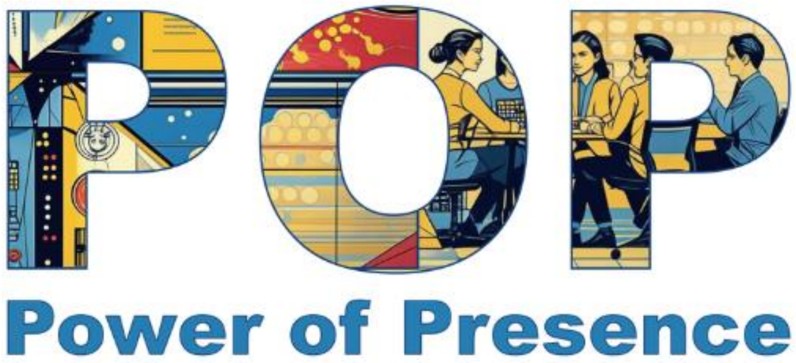
It was talking to mums about what their children eat - we knew they were quite relaxed / permissive about this, but all were claiming to be very strict, totally focused on health regardless of taste etc. There was a news story at the time that was very critical of parents being too lax with their children, and the ways they looked at each other nervously and shifted about in their seats made me think of this. We went off-guide and spent 10 minutes talking about this news story and they shared how they felt judged - after that, the floodgates opened on how they really felt about how their children eat. Their motivations were all about wanting their children to be happy, and not demonising food - but they had felt that saying this would make the others in the group think they were bad parents. Not only did we get to much more valuable findings, but their relief was palpable. Being there in person made this a better experience for all of us.

I once moderated a focus group about weather information with a deliberately selected group of people who had all screened as 'uninterested in weather information'. I showed a video all about how amazing the weather service is - with CGI of the quantum computing involved and dramatic scenes of tornados and hurricanes. After the video I asked 'what stood out?' - and it was just... crickets, tumbleweed. No one appeared to have absorbed even one single piece of information from the video. My whole findings report was based on the body language of disinterest: confused looks, blank perplexity, nudges, winks, slouches, sighs, yawns etc. None of which would have been visible had this been conducted online.

Observing how respondents opened physical packs - with teeth was not expected!

APPENDIX B
ADVICE FOR THE COLLECTIVE

(besides cost and location!)



Quicker turnaround times from recruitment to field to reporting.
An increased use of tech and AI at venues
Clients need to be reminded how great it is to see things live
Participant flexibility
Just one visit to a well-moderated group would change minds.
Demonstrating the value of in-person research to clients - why it's important to find the budget for it!
It's already very appealing - but clients need persuading that the extra cost investment is worth it.
Slowing down the pace- If we had more time to enjoy e.g. the travel and the ethnographic elements, rather than whizzing up and down on early and late trains, and not getting chance to take the time back after the extra hours of travel
Deals with local hotels or Airbnb's
Reminding us of the joy of someone else looking after logistics for you so you can focus on moderating (welcoming participants,
Clearer benefits what in person brings, worth paying more for
Give me data showing that it gives a genuine uplift, then maybe I have something hard to convince the client to stump up the extra
Emphasising the value of the connection, the power of the unsaid and the value of being able to build on respondent comments in
Availability of more venues / more competitive pricing to encourage more in person sessions
Facilities that don't feel so sterile - an environment that feels more like someone's front room, homely, cosy, puts people at ease
I think I will always default to being in person now and just making sure clients have the budget to not opt for the cheaper, online option as it's a false economy as they don't get as much from it
Better pricing of venues & options to livestream included in costs
If there was a significant difference in the quality of feedback. But, for most projects, if the online groups are skilfully conducted,
Cost is too obvious an answer in this current climate, however, what would be helpful is if facilities could offer a 'one total price, no surprises' option for a project. I've no idea how this would work but clients are always telling us how tight their budgets are so there can be a reticence to pass on any extra costs to them and we end up absorbing them instead.
Nothing. In person qual is dead
Faster & more cost effective recruitment. Higher quality filming & more camera angles for video clips in reporting / video edits.
We need stronger arguments about in person being better than online (at least in some circumstances), to offset the assumption
.... being able to ensure a wide pool of participants
It already is appealing! But it's not always the right/ affordable/ timely method to use now online can be good enough

Good flexible spaces with excellent quality recordings and streaming bundled in the price and good catering. The rooms also need to be large enough to display concepts or products, and to be able to have participants move around easily. There should also always be a choice of casual or business set up and comfortable seating. No hard plastic chairs that make your backside go to sleep. Plenty of space for observers too with lots of power points, good low level lighting, good sound systems and floor to ceiling mirrors - sometimes it is important to see the whole of the participant. Food should also be served at sensible times. For participants ideally a separate waiting area away from the main entrance so that they don't see the client arrive saying loudly "I am
Being confident to recruit day time sessions
Venues have regressed, we need more comfy settings again at affordable prices with affordable streaming - it's so obvious this is where facilities make a massive % of their money now how can it cost £500/night?!?
Realise the value, understand better the difference between in person and online, understand why should they spend more
Speed
...there are too many customs and rules around F2F esp. FGs where clients are only allowed to observe and maybe ask a couple of questions at the end of the session when respondents are on their way out of the door! A radical review and redesign of FGs is long overdue to involve ALL stakeholders and drive full engagement in the process - rules ...just break them and get creative!
Workshop options that are not available (or not to the same extent) online
Clients returning to the real world, real person mentality and not "cheap enough is fast, and fast and cheap are good enough" use of tools they maybe don't fully understand.
Knowing that everyone who has signed up to come will honour their commitment and attend as promised. It is frustrating when participants drop out of online focus groups, but when they drop out of ones where a room has been booked, other participants have travelled, moderators (sometimes clients) have travelled, refreshments have been arranged etc, it is more problematic. More
Client pull
Knowing it will genuinely make a difference to the quality of the outputs and outcomes. But we tend to be led by what our research agency partners recommend to fit the brief
Acceptance that online interviews aren't 'good enough' for certain types of research
More flexibility re timings especially for IDIs or mini-groups
Understanding by clients that truthful insights only come from face to face interviewing; online respondents pretend, lie or don't
Good hosts / tech support are worth their weight in gold, and make a big difference between a facility vs a generic venue like a community centre or hotel conference room
More clients wanting to do real research!

Availability of in person activity video tools and AI creation of commercially ready snips.

... it's about focusing those in-person sessions on creative spaces and exploring physical/tangible/confidential products. Potentially a service that provides 'drop in' or 'pop-up' in-person qual at short notice for those quick/agile research needs

Human-centric, IRL, experience that are richer than online. Ability to probe and obtain nuanced responses

As a recruiter I can only do what my clients ask of me so I have no control over this. I just hope that my clients see the value in bringing back more F2F. Also, it would certainly help with the issue of fake respondents from overseas.

Portable set ups so you can come to us or meet us in different locations e.g. not just city centres

Maybe some different formats for viewing experiences and respondent set up too.

Suitable location - near to tube stations. Suitable time-slots. Good financial incentive

I need to find a way to convince my clients that they will get more from in-person and aren't just making my life easier to moderate - I wish we did everything face to face! Many of my clients have never actually been to a viewing facility.... so can Aura / MRS / AQR run more training / evenings at studios / can the industry work to help fill studios during the day when they need meeting rooms? We cant let them die and I feel that with biz rates / higher rents that Central London is on borrowed time

A greater the pool of participants - clients not seeing the same participants or feeling they are. I have change the venue and times of current groups to help manage this.

It's horses for courses... but online often allows for more flexibility and easy to repeat. But many projects just need the human

Really emphasising the value/ deeper insights that can be achieved in-person and how this can be done in an affordable/ flexible

More push for it- so much better for engagement and new people in the industry

To clients: if they stopped to think about the fact that they are trying to sell their products to other human beings

For them (clients) to see it more often and have that eureka moment themselves when watching in-situ rather then via their computer screen. to hear clients eulogise about the difference between a Zoom group and a real F2F group

More sunlight!

I think the issue isn't with in-person vs, remote. It's clients' views of the importance of doing qual research to understand what's going on, why that's happening and how they can do something about it. At the moment, marketing is obsessed with data and AI - and qual is being squeezed out of the picture. So I feel we have to keep talking about connection and depth in the most human and

Already sold on given at least 20% of panel data is bad

The flexibility of streaming the sessions as a constant package.

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APPENDIX C
KEY QUESTIONS

POP

Power of Presence

For each of the following, please tell us how often you and/or your organisation have used them in the past 2 years:

1. Have used frequently
2. Have used occasionally
3. Have rarely used
4. Have never used
5. Don’t know/prefer not to say

- Viewing Facilities / Research Venues for Groups or IDIs
- Venues for other in-person research e.g. Central Location Tests
- Online Focus Groups or IDIs
- Other Online Qual e.g. insight communities
- Human moderators
- AI moderators
- Human transcriptions
- AI generated transcriptions
- AI generated summaries or sentiment analysis
- Automated or AI assisted video highlights/reels

Besides those already mentioned, in what other ways is automation and/or AI supporting your research? *Please give us much detail as possible.*

____ **WRITE IN/ALLOW SKIP**

Which of the following best fits your current perspective for delivering better quality data and/or insights ...?

RANDOMISE. SLIDING SCALE FOR EACH, mid-point marked as 'a balance offers the best outcome'

+ don't know/prefer not to say option

Digital/online	______________________________	In-person
In-person	______________________________	AI/automation
AI/automation	______________________________	Digital/online

Whilst it is recognised that all methods have an important role to play and can be applied or combined as appropriate for the objective, which of the following best fits your current perspective ...? SINGLE ANSWER

1. In-person is **always** superior to digital/online methods
2. In-person is **often** superior to digital/online methods
3. Both have strengths but I lean more towards in-person methods
4. Neither is better than the other
5. Both have strengths but I lean more towards digital/online methods
6. Digital/online methods are **often** superior to in-person methods
7. Digital/online methods are **always** superior to in-person methods
8. Don't know/prefer not to say

Now we would like to learn a little more about what proportion of your research is in-person/face-to-face.

Approximately what percentage of your *qualitative* research in the past 12 months has been conducted in-person/face-to-face (not digital/online/telephone etc.)?

- 0–10%
- 11–25%
- 26-50%
- 51-75%
- 76-100%
- Don't know/prefer not to say

Ignoring any business volume changes, is the percentage of your *qualitative* research that takes place in-person/face-to-face (not digital/online/telephone etc.):

1. Significantly more than the previous 12 months
2. A little more than the previous 12 months
3. About the same
4. A little less than the previous 12 months
5. Significantly less than the previous 12 months
6. Don't know/prefer not to say

Ignoring any potential business volumes changes, do you feel the percentage of your *qualitative* research that takes place in-person/face-to-face (not digital/online/telephone etc.) will:

1. Significantly increase in the next 12 months
2. Increase a little in the next 12 months
3. Remain about the same
4. Decrease a little in the next 12 months
5. Significantly decrease in the next 12 months
6. Don't know (too unpredictable)
7. Prefer not to say

REPEATED FOR QUANT.

How much of a barrier are each of the following for you or your organisation when choosing whether to conduct your research <u>in a viewing facility / research venue</u>? RANDOMISE.

(Rating scale 1–5 + not arisen/not applicable + don't know/prefer not to say)

1 = **Not a barrier**

5 = **A significant barrier**

- Budget/costs
- Client preference for remote methods
- Moderator preference for remote methods
- AI can give us the answers that we need
- Access to local moderators
- Access to local recruiters
- Availability of niche audiences
- Needs wider geographic reach
- More difficult to eject disruptive participants
- Facilities unavailable (fully booked in fieldwork period)
- No local facilities – convenience and travel time
- Speed/turn-around time from kick-off to insights
- Sustainability/carbon footprint

B8 What other <u>significant</u> BARRIERS (if any) have you experienced that influence your decision NOT to conduct research in a viewing facility / research venue? *Please focus on barriers that are unique to in-person approaches.*

____ **WRITE IN/ALLOW SKIP**

How much of a motivator are each of the following for you or your organisation when choosing to conduct your research <u>in a viewing facility / research venue</u>? **RANDOMISE.**

(Rating scale 1–5 + not arisen/not applicable + don't know/prefer not to say)

1 = **Not a motivator** (including if the issue has not arisen to date or is not applicable)

5 = **A significant motivator**

- Client preference for in-person methods
- Opportunity to meet with client and/or for client team to be together
- Observation / immersion into the experience
- A host manages logistics and recordings/streaming etc.
- A host takes care of respondents, moderators and observers
- Moderator preference for in-person methods
- Moderator and respondent connection / rapport
- Group dynamics / rapport within the group
- Depth of interaction
- Higher engagement with the topic
- Body-language and micro reactions (non-verbal communication)
- Handling of live stimulus e.g. product
- Confidentiality of stimulus e.g. creatives
- Technical barriers of online e.g. internet connections, video quality, device issues
- Respondent attention versus online e.g. no at-home distractions or multi-tasking, not muted

What other <u>significant</u> MOTIVATORS (if any) have you experienced that influence your decision to conduct research in a viewing facility / research venue? *Please focus on motivators that are unique to in-person approaches.*

____ **WRITE IN/ALLOW SKIP**

Now we would like to understand if you have any specific examples where in-person research has offered an advantage:

Have you ever been present at a venue for in-person Focus Groups or IDIs:

- Yes
- No **SKIP TO C5**
- Prefer not to say **SKIP TO C5**

Have you ever observed something in-person that changed your interpretation of the discussion/interview e.g. body language, group dynamic, off-script moment?

- Yes
- No
- Don't know/prefer not to say

If yes, **If you are happy to share an anonymous example that may be included in our final report or broader industry communications (e.g. articles/posts, presentations), please describe what happened and why it mattered.**

No identifiable client, brand, or project information, please! ________________________________ **WRITE IN/ALLOW SKIP**

What *one* word would you use to describe the feeling of being "in the room" during focus groups?

____ **WRITE IN/ALLOW SKIP**

Finally, what would help make in-person qualitative research more appealing to you and/or your team and/or your clients right now ____ **WRITE IN/ALLOW SKIP**

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APPENDIX D
ABOUT PLUS4

POP

Power of Presence

About Plus4 (UK, EU and Worldwide)

plusfour

We are an independent Research Agency with the expertise to create bespoke research to meet project needs:

- Projects Completed 23,000+
- Experience 50+ Years
- Industry agnostic
- 10 Core team Field team 750+
- Qualitative & Quantitative
- Consumer & B2B
- UK, Europe & Worldwide
- Own research viewing facility

For reasons of transparency, we provide some of our own thoughts/our ethos on the topics herein.

We have our own facility The Qualitative Lab (London -Wimbledon) available for external hire. Our human moderators believe they can do the best job, have more attentive respondents, and deliver the best insights - and therefore the best value - through in-person sessions (in-facility, in-home, in-situ e.g. shop-alongs etc.). However, like many, we **more-often** use online focus groups/IDIs, in our case, due to the location of the target audiences e.g. regional representation, areas without facilities etc. Both approaches allow us to use AI transcripts, though typically we would only do so for IDIs, not groups, where we believe human transcription or relistening is superior.

We regularly use other online qual approaches when it is a ‘best fit’ for the objectives e.g. multi-day tasks, iterative studies, diaries, video ethnography etc., so **we are not wedded to in-person.** Many of these options include AI summarisation which can be a useful sense-check of our own hypotheses/human analysis.

We also undertake Quantitative research, our in-house team The Analysis Solution designs, scripts, hosts (and undertakes data processing for) online and CAPI surveys. They also provide both human and AI/automated coding and both human and AI/automated charting, as well as dashboards. Our nationwide fieldforce for recruitment and in-person interviewing (on-street, exit surveys, CLTs etc.) is managed by our in-house team The Field Division – both teams work directly for end clients **and other research agencies**, not solely for Plus4.

Our in-house researchers and moderators are hands-on throughout and, like others, we occasionally use AI front-end to generate or build-on ideas at the design stage, but we are human-first for reporting. Only with client permission do we use experimental AI approaches, at this point in time, always alongside established Qual/Quant approaches. For more information, contact us.

Contact us

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plusfour

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the qualitative lab the international connection

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Reflections

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The Glasgow View

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