Conducting a Focus Group; How to Get Started

A Beginner’s Guide to Getting Feedback
Last Edited: 1.08.2015
Objective of this document:
Learn how to conduct a focus group that will yield meaningful results. Gain a skill that you will be able to use for conducting future research.

Who this manual is appropriate for:
This document is for people who have no prior experience with conducting focus groups but who would like to gain a basic understanding of best practices.

What you will learn:
- The Purpose of a focus group and why it is an important research tool
- How to prepare for a focus group
- The skills for conducting a focus group
- Effective communication that will help you gain valuable information from participants
- How to compile and analyze the results
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What Is a Focus Group?

Why Conduct Focus Groups?

Putting the Wheels in Motion

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Step 2: Question Development
Step 3: Create a Script
Step 4: Time and Place
Step 5: Recruitment
Step 6: A Few Days Before

Key Roles

Step 7: Day Before
Step 8: The Day Of
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Introduction

Welcome. This document is designed to give you a basic understanding of how to conduct a focus group. The material is laid out in a spacious format for easy scanning and uses a large font for easy reading. The landscape format is intended for images on the right as well as space for your notes. The step-by-step structure will allow you to set up a study as you follow the instructions.

What Is a Focus Group?

Focus groups are an inexpensive way to identify people’s preferences, motivations, thoughts, feelings and attitude towards a product or service. In a typical focus group, approximately 6 to 10 people spend 60 to 90 minutes voicing their opinions about your website or application. They differ from usability studies in that they show participants’ attitudes towards a particular item, whereas usability studies reveal how things are used.

Focus Groups = Attitude
Usability = Performance
## Why Conduct Focus Groups?

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Inexpensive and easy</td>
<td>- A few strong personalities may influence the entire group</td>
</tr>
<tr>
<td>- Great for getting firsthand perspectives</td>
<td>- Statistically, may not always represent an entire community</td>
</tr>
<tr>
<td>- Reveals information that otherwise may have gone undiscovered</td>
<td>- May be difficult to find participants (recruitment)</td>
</tr>
<tr>
<td>- People often build on each other’s thoughts, creating a rich understanding and new ideas</td>
<td></td>
</tr>
<tr>
<td>- Clarifies misunderstandings</td>
<td></td>
</tr>
<tr>
<td>- Appropriate for exploring unknown territory</td>
<td></td>
</tr>
</tbody>
</table>
*Is this what you expected to see?
Putting the Wheels in Motion

Step 1: Identify Goals / Objectives

Goals are important to the focus group process because they keep the project on track. Goals clarify the purpose of the study and provide a foundation for a good outcome. Once the goals are formulated, you should be able to develop questions that support the research. Answering one of the following simple questions will help you identify your goals and make your event a success.

- “Why are we gathering a group together?”
- “What are we trying to find out?”
- “What would we like to accomplish?”

Example Goals

“Find out how customers feel about our product.”
“Discover underlying motivations for using our website.”
Step 2: Question Development

Once your goals are clear, the natural progression is to develop questions that support your goal. The structure described below will help you create strong informative questions.

Question structure
1. Questions should be asked in an open-ended format that requires participants to answer with more than yes or no. Open-ended questions allow the participant to answer without ambiguity, and they have the potential to reveal undiscovered information.

Example

<table>
<thead>
<tr>
<th>Open-Ended Questions</th>
<th>Closed Ended Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>“What did you like best about the website?”</td>
<td>“Do you like the website?”</td>
</tr>
<tr>
<td>“What was the biggest problem with the website?”</td>
<td>“Do you hate the website?”</td>
</tr>
</tbody>
</table>

2. Questions should be short and clear.

Example

<table>
<thead>
<tr>
<th>Short and Clear Question</th>
<th>Long and Wordy Question Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>“How did the picture make you feel?”</td>
<td>“Given that you’ve taken time out of your day and the weather is nice today, how did the picture make you feel?”</td>
</tr>
</tbody>
</table>
3. Questions should sound conversational, informal, and use words that are familiar to the participants.

**Example**

<table>
<thead>
<tr>
<th>Friendly question</th>
<th>Formal Questions Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>“What did you think of the page layout?”</td>
<td>“Was the left navigation pane up to your satisfaction?”</td>
</tr>
</tbody>
</table>

4. Each question should ask only one thing.

**Example**

<table>
<thead>
<tr>
<th>One Topic Question</th>
<th>Multiple topic Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>“What was your favorite thing about this video?”</td>
<td>“What was your favorite thing about this video and would you watch it again?”</td>
</tr>
</tbody>
</table>

5. Questions should be neutral and not lead the participants towards a particular question.

**Example**

<table>
<thead>
<tr>
<th>Neutral Question</th>
<th>Leading Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Which website do you prefer?”</td>
<td>“Don’t you think this a better website?”</td>
</tr>
</tbody>
</table>
Step 3: Create a Script

At this point, you may be asking, “why do I need a script? I created questions!” Scripts provide a framework that your questions fit into. They also keep the event on track and provide consistency if you’re conducting more than one group. The following is an outline that you can use to develop your script:

<table>
<thead>
<tr>
<th>Intro (Setting the stage)</th>
<th>Body</th>
<th>Closing</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Introduce yourself</td>
<td>- Ask questions (See question development)</td>
<td>- Let people know once again how helpful they’ve been</td>
</tr>
<tr>
<td>- Purpose of the day</td>
<td>- Have participants sign consent form</td>
<td>- Make them aware of how they can reach you if they have any questions or additional thoughts</td>
</tr>
<tr>
<td>- How the day will be run</td>
<td>- Have participants sign consent form</td>
<td>- Make them aware of how they can reach you if they have any questions or additional thoughts</td>
</tr>
</tbody>
</table>

Example: Focus Group Script (docx):

www.digitalgov.gov/files/2014/01/FocusGroupDiscussionGuide-generic.docx
1. Business Goals
2. Your audience
3. Top Tasks
Create a script
Practice and revise
Bring to class
Step 4: Time and Place

The date and location can make or break a focus group, so make sure to plan ahead to secure the optimum experience. Having the right environment lets participants know they are important to the task at hand.

<table>
<thead>
<tr>
<th>Time</th>
<th>Place</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Convenient for everyone</td>
<td>- Easy to access</td>
</tr>
<tr>
<td>- Late in the afternoon</td>
<td>- Neutral and distraction free</td>
</tr>
<tr>
<td>- Monday and Tuesday are the best days</td>
<td>- Ample space for seating</td>
</tr>
</tbody>
</table>

1 Morgan, 1998
2 Morgan, 1998
Step 5: Recruitment

Your focus group is only as good as your participants. Define your target audience. Who is relevant to what you want to find out? The general rule is to recruit 8 to 10 people and assume that 20% will not show.

The initial contact with potential participants can come in many forms: phone call, survey, email blast, word of mouth and flyers. Once the initial contact is made, you will need to screen them.

**Screener**

A screener is a script designed to recruit potential candidates by filtering those who don’t fit in the specified demographic. The goal of the screener is to be a systematic script that informs the participant of key facts while determining their eligibility. Screening can take place by phone or digital survey. The following is a guide to help you develop a script that ensures you’ll ask the right questions and set the tone for your event.

**Example: Screener Script:**

### Components of a Screener

<table>
<thead>
<tr>
<th>Intro (Setting the stage)</th>
<th>Body (Main questions)</th>
<th>Closing</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Introduce yourself</td>
<td>- Demographics</td>
<td>- Participants contact information</td>
</tr>
<tr>
<td>- Purpose of the day</td>
<td>- Conflict of Interest</td>
<td>- Special Needs</td>
</tr>
<tr>
<td>- Event Specifics</td>
<td>- Too Knowledgeable</td>
<td>- Show appreciation</td>
</tr>
<tr>
<td>- Benefit of Participating</td>
<td>- Behavioral</td>
<td>- Your contact Information</td>
</tr>
<tr>
<td>- Verify Interest</td>
<td></td>
<td>- Setting Expectations and Summarization of the facts</td>
</tr>
</tbody>
</table>

See Screener Template in Appendix

### Demographic Questions

Start with demographic questions to eliminate the obvious bad fits. There is no point in wasting your time or the participant's time completing the rest of the screen. For example, if you're conducting a focus group that requires participants who use email a lot, your first question should be: “which of the following describes how many emails do you send out a week?”

---

Which of the following describes how many emails do you send out a week:

<table>
<thead>
<tr>
<th>Choice</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Never</td>
<td>Terminate</td>
</tr>
<tr>
<td>Up to 10</td>
<td>Terminate</td>
</tr>
<tr>
<td>11 to 20</td>
<td>Terminate</td>
</tr>
<tr>
<td>21 or more</td>
<td>Continue</td>
</tr>
</tbody>
</table>

**Conflict of Interest**

Next, you want to eliminate people who have a conflict of interest with your objective, your client or the product. If you are testing a mobile app that helps people quit smoking, make sure that participant doesn’t work for a cigarette manufacturer.

**Too Knowledgeable**

You’ll also want to eliminate people who have too much knowledge on the subject. Using the quit smoking app example again, if your participant is a knowledge expert about cigarette addiction, they are not a good fit.
Behavioral Questions
At this point, you'll want to focus on behavior. Although demographics are important, it is more important that you have the participants that fit the needs of your study. If you are trying to understand the pain points of purchasing a mobile phone, you'll want to include a question about when the participant last purchased a cell phone (make sure it is open-ended!).

Contact Information Questions
If you have determined that this would be a good fit then continue by getting contact information.

Special Needs
Ask participant if they have any special needs or requirements.

Asking for Permission to Record
This question is not necessary if you are not recording the event. However, if you are going to record the event, it is imperative that you tell participants during the screener.
Compensation
If you are offering compensation, the rates may vary depending on the audience. For example, if they are professional pay accordingly. If you are not giving compensation, you need to make that clear, too.

Setting Expectations and Summarizing the Facts
Give the participant the opportunity to ask questions. Then, reiterate your expectations. Restate the date, time and location of event, as well as what they’ve agreed to.

Writing a Screening Question
How you write the screening questions is very important: you never want to give away what you are looking for. For example, if you are conducting a focus group and looking for people who recently started using your site, ask the question in a way that includes multiple elimination answers. This makes it harder for a participant to deduct the “right” answer.
### Right

**How long have you been actively using XZY.com?**

<table>
<thead>
<tr>
<th>Option</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 3 months</td>
<td>Continue</td>
</tr>
<tr>
<td>Less than 6 months</td>
<td>Continue</td>
</tr>
<tr>
<td>1 year</td>
<td>Terminate</td>
</tr>
<tr>
<td>2 years</td>
<td>Terminate</td>
</tr>
</tbody>
</table>

### Wrong

**Have you recently started using our site?**

<table>
<thead>
<tr>
<th>Option</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 3 months</td>
<td>Continue</td>
</tr>
<tr>
<td>More than 6 months</td>
<td>Continue</td>
</tr>
<tr>
<td>1 year</td>
<td>Terminate</td>
</tr>
<tr>
<td>2 years</td>
<td>Terminate</td>
</tr>
</tbody>
</table>
Step 6: A Few Days Before

**Remind Participants**
A few days before the event, send a reminder email. Make sure to include times, addresses, directions and a phone number where people can reach you. Make sure to mention that you appreciate their time.

**Roles**
In addition to the checklist, make sure you review roles / tasks and are comfortable with how things are going to unfold.
## Key Roles

<table>
<thead>
<tr>
<th>Position</th>
<th>Role</th>
<th>Skills Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead / Facilitator</td>
<td>Guides the event and keeps the discussion on point.</td>
<td>- Keeps event on track. &lt;br&gt; - Stays neutral &lt;br&gt; - Listens carefully in order to ask follow-up questions</td>
</tr>
<tr>
<td>Recorder / Note taker</td>
<td>Using a computer or paper, documents participant comments (in a discreet location)</td>
<td>- Listens closely and quietly takes notes &lt;br&gt; - Observes and documents everything, including non-verbals (ex: participants’ posture)</td>
</tr>
<tr>
<td>Greeter</td>
<td>Optional: Welcomes participants. Positioned at the entrance of the room or entrance of the building.</td>
<td>- Must be friendly &lt;br&gt; - Able to attend to people’s needs</td>
</tr>
</tbody>
</table>
**Guidelines for Lead / Facilitator**

Being the facilitator is a very important role. After all the hard work of organizing the event, you are guiding the final outcome. Keep the following in mind.

- Start off the session by welcoming participants.
- As facilitator, it is important to balance being friendly and being professional. You want to build rapport, but you also don’t want to treat participants like friends.
- Your job is to actively listen, which includes noticing posture and gestures. Conversely, let the participants know you are listening by saying phrases like “thank you,” “that is helpful” and “If I’m hearing you correctly, you’re saying… (repeat what they said)”
- Stay neutral.
- Silence is more than okay: it is actually a positive thing because participants tend to feel compelled to fill the silence. It also gives them a chance to think about what they want to say.
- Manage time. It is more important to keep things moving than to get too involved in an in-depth conversation about one question. Be polite and look for moments when you can segway into the next question.
- Keep things positive.
- RESPECT everyone’s ideas.
- Stick to the script.
- Be aware of fatigue and don’t overload the participants.
Recorder / Note Taker

You may be thinking “notes are just notes,” but that is not entirely true. As note taker, it is your job to observe and document everything without interjecting your presence.

When taking notes for an exercise like a focus group, you should document three things:

- Descriptions: A narration of the activities and observations as they occur. Include inferred observations - deductions from what you hear. However, make sure that you are neutral in your interpretation. For example:
  
  Initial feelings immediately after the video was played:
  multiple participants thought the video was offensive. It was clear that they felt strongly that it sent the wrong message.

- Quotes: Documenting quotes can be powerful when summarizing your findings and can drive your points home.
  
  “Watching this video made me angry!”
  “I loved this video, I wish I could watch it again.”

- Posture: A lot can be told by observing unspoken communication. Make sure to document it.
  
  Participants fists were clenched by the time the video finished playing.
Step 7: Day Before

All your hard work is about to pay off. Get your checklist out and make sure you are prepared for the big day. See Appendix for Checklist

Step 8: The Day Of

Be at the venue early. Your participants are taking time out of their day so don’t disrespect them by making them wait. Organize all your supplies and make sure everything is in working order. If possible, have someone waiting at security to escort them, especially if the conference room is difficult to find (you don’t want to frustrate them). Offer snacks and refreshments if possible.
Step 9: Debrief / Report the Facts

Make sure staff debriefs directly after the focus group ends to take advantage of first impressions. As a group, document what you learned and review the notes or recordings taken by the notetaker. Try to identify patterns and themes based on the data presented.

Synthesize the information into a report. It should have a summary where you clearly state what you learned. Point out concerns of the participants, making sure to capture their emotions, including pain points as well as wins. Sandwich negative feedback within positive, if possible. Include quotes to strengthen your findings.

The power of focus groups comes from the lessons learned that wouldn’t have otherwise been identified. Share your document to gain buy-in from decision makers and collaborators.
Learn More?

Want to learn more? Check out the following resources:

http://www.usability.gov/how-to-and-tools/methods/focus-groups.html

Test Your Knowledge

Find out if you’re a focus group superhero by taking a fun quiz in the appendix.

Contact Us

Let us know how we can improve this document. If you facilitate a focus group, tell us your story at: govux@gsa.gov
References

http://uxmyths.com/post/1319999199/myth-26-usability-testing-focus-groups
http://www.humanfactors.com/newsletters/mind_the_gap.asp
http://uxmyths.com/post/1319999199/myth-26-usability-testing-focus-groups
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http://www.focusgrouptips.com/
http://www.uk.sagepub.com/gray3e/study/chapter18/Book%20chapters/Planning_and_designing_focus_groups.pdf
http://www.userfocus.co.uk/articles/screeners.html
Appendix

1. Screener Template
2. Focus Group Checklist
3. Quiz: Test Your Knowledge
# Focus Group Screener

<table>
<thead>
<tr>
<th>Introductions</th>
<th>Introduce yourself: “Hello, my name is __.”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Explain who you’re working for</td>
<td>“I’m conducting this research on behalf of__.”</td>
</tr>
<tr>
<td>Purpose of the day (Don’t be too specific, you don’t want to create biases)</td>
<td>“I’m looking for people to participate in a focus group. We’re looking for participants who can give us their opinion regarding__.”</td>
</tr>
<tr>
<td>Event specifics</td>
<td>“Location:__.”</td>
</tr>
<tr>
<td></td>
<td>“Special considerations:__”</td>
</tr>
<tr>
<td></td>
<td>“Date and time:__.”</td>
</tr>
<tr>
<td>How the participants involvement will benefit</td>
<td>“Your participation will help improve__.”</td>
</tr>
<tr>
<td>Give the participant a chance to let you know if they’re interested</td>
<td>“Would you consider doing this?”</td>
</tr>
<tr>
<td>Setup of the Demographic questions</td>
<td>“Do you have a moment for a few questions”</td>
</tr>
<tr>
<td>Demographic questions</td>
<td></td>
</tr>
<tr>
<td>Too knowledgeable questions</td>
<td></td>
</tr>
<tr>
<td>----------------------------</td>
<td>---</td>
</tr>
<tr>
<td>Behavioral questions</td>
<td></td>
</tr>
</tbody>
</table>
| Contact information questions | “May I have your contact information?”  
Name:  
Address:  
City, State, Zip:  
Phone number:  
Cell phone number:  
Email address:  |
| Special Needs Question | “Do you have any considerations I should be aware of?”  |
| Asking for Permission to Record | “On the day of the session, we will ask you to sign a release form that would allow us to record the session. It would only be used for internal purposes. Are you comfortable with that? Will you consent to be videotaped?”  |
| Compensation | “In gratitude of your time we would like to pay you___.”  |
| Appreciation | “Thank you for your time, we really appreciate it.”  |
| Set Expectations and Summarization of the Facts | “Those are all the questions I have for you. You fit the profile I’m looking for, if you are still interested in participating? Just to summarize, this focus group will take place at [Location]. On [Date and Time]. It’s ok to record you. Compensation is [Amount]. You’ll receive a confirmation will all the pertinent information and a reminder.”  |
Focus Group Checklist

- Lead/Facilitator
- Recorder/Note Taker
- Greeter (Optional)
- Questions
- Agenda
- Script
- Participants
- Printouts, videos, and other content
- Consent forms
- Pens
- Name tags / table tents
- PC laptops to present  (Macs must have video and HDMI dongle attachment)
- Recommended: coffee, donuts / bagels, water, napkins, plates
- Tape and Paper for signage
Test Your Knowledge

1. Which of the following is **not** an open ended statement?
   A. What did you like best about the website?
   B. Why is XYZ the favorite aspect of your experience?
   C. Do you like the site?

2. Which of the following is an advantage of a focus group?
   A. Statistically, may not always represent an entire community
   B. Great for getting firsthand perspective
   C. It might be difficult to find participants

3. True or false: Focus groups are a inexpensive way to unveil how things are used.
   A. True
   B. False

4. Which of the following should **not** be included in an introduction of a focus group:
   A. Purpose of the day
   B. How the day will be run
   C. A weather report
   D. Make sure they know that their contribution is invaluable
5. What is the good answer when a participant says “I like this?”
   A. “Oh, that’s interesting.”
   B. “So do I!”
   C. “Really, who would pick that?”

6. What is the role of Recorder/notetaker?

   
   
   

7. What purpose does a “Screener” serve?
   A. It's a tool that allows the participant to strain and wash grapes.
   B. Serves as a filter which excludes ill suited participants.
   C. A survey given after the focus group to reveal how people really felt about the focus group.

8. When conducting a focus group, it's important for the facilitator to:
   A. Be overly friendly.
   B. Be neutral.
   C. Talk over the participants and let them finish their thoughts.

9. True or False, Debriefing should take place a long time after the focus group.
   C. True
   D. False
Answers

1. B
2. B
3. A True
4. C
5. A
6. Observe and document everything without interjecting your presence.
7. B
8. B
9. B. False
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Page 20, “Male Faces Icon Set” 464837999/Mastaka/iStock/Thinkstock
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