

Focus groups for design research

New Hampshire Usability Professionals
Association



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Common types of design research

- Interviews
- Surveys
- Site visits
- Card sorts
- Usability testing

Involves observation and analysis of the user experience – one individual at a time. Often times you already know the questions you want to ask.



Why use groups?

Groups are -

- Spontaneous
- Conversational
- Synergistic
- Open

They give you the chance to learn more about your target audience's **thought & decision-making process**



A little background on focus groups

- They are a “group interview” with people who share common characteristics
- Invented in the 1930’s by sociologist Dr. Robert K. Merton
- Borrows from sociology, psychology, anthropology, and ethnography

OTHER ASPECTS

- Rely on a trained moderator
- Carefully planned
- Insights can be generalized to a larger audience



When should you use them?

Focus groups are best for gathering insights on **perceptions, opinions, beliefs, and attitudes (POBAs*)**

Example uses

- Float a concept
- Figure out the right questions & language for a survey
- Determine content items for a card sort
- Get content and feature ideas for a large portal
- Learn more about a target audience's needs, pain points, aspirations

Focus groups work best where you can get the best insight about your audience by listening to their conversation



Moderating is fun but not easy

Your role is to **get a group of strangers to talk deeply** among themselves about your issues.

It takes time to learn the skills

Nuts & Bolts of Running a Group



Moderation + Recruitment matter

THE MODERATOR MUST KNOW HOW TO

- Guide the **group process**,
- Ask the **right questions**, and
- Make sure to bring the **right participants** in the room



Each participant costs \$500

- When you add all costs associated with a focus group (room, honorariums, recruitment fee, moderator fee, food, etc) **a typical group costs \$6,500**
- So you have to be **on the money** with the people you select

ADVICE

- Find a professional recruiter you trust
- Formalize criteria into a screener
- Monitor the recruiting
- Rescreen yourself (if possible)



Spend time refining your screener – stay in close touch with the recruiter

4. What is your occupation? _____

5. Respondent must fit into one of the following categories [**PROBE IF NECESSARY, BUT DO NOT READ LIST**]:

OCCUPATIONAL CATEGORY		OPTIMAL DISTRIBUTION
Executive (travels often, but must stay connected with team)	<input type="checkbox"/>	2
Mobile Professional (e.g. salesperson who works frequently while on the road)	<input type="checkbox"/>	3
Collaborative worker	<input type="checkbox"/>	1
On-road technician (e.g., field service)	<input type="checkbox"/>	3
Executive assistant	<input type="checkbox"/>	1

6. When did you start using your iPhone?

Before July 2009 after July 2009
[] CONTINUE [] →**TERMINATE**

7. How often do you use your iPhone to do your work remotely?

> 3 times a week < 3 times a week
[] CONTINUE [] →**TERMINATE**

8. Do you use Web conferencing in your daily work to collaborate with colleagues?

Yes No
[] CONTINUE [] →**TERMINATE**

9. How would you describe Web conferencing?

([Wikipedia](#) definition: **Web conferencing** is used to conduct live [meetings](#), training, or [presentations](#) via the [Internet](#). In a web conference, each participant sits at his or her own [computer](#) and is connected to other participants via the internet. This can be either a

RECRUITING FOR A FOCUS GROUP IS SIMILAR TO RECRUITING FOR A USABILITY TEST

Except you have 6-12 people coming at once

The people in your group must **share the key characteristics** and be able to express themselves

To get the right people you need to ask the right questions



Monitor the recruiting progress

ERIN G	F	150-400	INSURANCE BROKER	COLLABORATIVE WORKER	IPHONE	BEFORE JULY 09	MORE THAN 3 TIMES A WEEK	YES	REAL TIME REMOTE
TATIANA A	F	150-400	CASE WORKER FOR A COMMUNITY ORG.	COLLABORATIVE WORKER	IPHONE	BEFORE JULY 09	MORE THAN 3 TIMES A WEEK	YES	SPEAKING VIA A DEVICE LIKE ONE PERSON
GIANCARLO N	M	25-74	OFFICE MGR FOR BIOTECH	EXECUTIVE ASST	IPHONE	BEFORE JULY 09	MORE THAN 3 TIMES A WEEK	YES	SPEAKS TO I
DEVON M.	M	250	IT HELP DESK/ HEALTHCARE		IPHONE			YES	
ERIC A.	M	65	SALES/ COMPUTER SOFTWARE		IPHONE			YES	
KEITH S.	M	500	DIRECTOR OF IT		IPHONE			YES	
DEMETRIA C.	F	51 IN HER DIVISION, COMPANY 1500	EXECUTIVE ASSISTANT		IPHONE			YES	

Your recruiter should send you daily updates –

They should send you a spreadsheet showing the key characteristics of the people they've chosen. A good recruiter will call you when they have questions. Make sure they really understand the type of person you need.

Make sure the recruiter accurately describes the nature of the group so the participant knows what to expect., without being too detailed



What makes a good moderator?

ABILITY TO

- **really listen** & enter another person's world
- quickly establish & maintain **rapport** with strangers
- connect dots in real time
- **remain neutral** & poker faced
- **guide** the **group process**
- internalize study objectives so you can **ask the right questions**



Managing group dynamics

- Divide attention **between what people are saying and how the group is doing**
- Starts with the introduction – ground rules and connection
- **Scope people out early** – notice behavior and communication patterns
- **Keep tabs on each person's emotional state**, draw out quiet ones, let them know you are interested in them
- Guard your words and actions
- **Rapport is your gold!!!**



Keep things moving

- Know the moderator guide inside & out
- Manage time so you cover the critical topics
- Be ready to **follow the group** as long as they are serving the objectives
- Interrupt and redirect as needed
- **Dig into your** moderator **bag of tricks** when energy sags



The Introduction (5 minutes)

Sets the tone for the group.

Goals: establish climate **of trust and open communication** so people feel **safe** to express themselves, and they understand **why they are there**

Components

- Preamble (greetings, purpose, general plan, disclosures)
- Ground rules (always!!)

You have **about 5 minutes** to set the tone before digging in



Ground Rules

ADJUST THE RULES TO YOUR AUDIENCE

- Please talk one at a time
- Talk in a voice as loud as mine so your voice will be recorded properly
- Avoid side conversations with your neighbors
- I need to hear from everyone: however, you do not have to answer every question
- Work for “equal air time” so everyone gets a chance to participate equally
- Allow for different points of view. There are no wrong answers
- Say what you believe, whether or not anyone else agrees with you
- Only one person at a time should be up or out of the room

Ground rules give everyone a sense of security because they **establish group norms**



Have everyone introduce themselves

- Point is to **get each person talking** and for them to learn a bit about each other so they are **more comfortable**
- Gives you a chance to **scope out people's behavior and communication** patterns
- Write down 2-3 things you want people to say, include something fun:
 - “tell us... your first name and your favorite type of doughnut”*
- **Never** ask a question that **creates tension or indicates social status** (e.g., where was your last vacation or what kind of car do you drive)



How to get them to talk



Start with general questions to warm up the group before asking more detailed questions

Use the “hour glass” approach



Rapport & Reconnaissance (10 min)

- Get the ball rolling by asking **general questions** everyone can answer
- General questions are **social icebreakers** + help people wrap minds around a topic
- Consider giving people **homework** to get them thinking about how the topic impacts them in their everyday life
- **End with a simple group exercise**, an intervention



Some tips for active listening

- Look at the person talking
- Think only of what they are saying
- Acknowledge them with a nod, smile or neutral remark
- Paraphrase for clarification
- Summarize the essence of their point
- Relate it to other themes in the group



In-Depth Investigation (60-75 min)

- Questions become **more detailed and focused on issues** related to the study topic
- Participants should **feel relaxed** and on the **same wave length** as the other people in the group
- Discussion moves to an **increasing level of detail and complexity**
- Moderator delivers **clear questions and activities**, keeps conversation flowing among group members, and keeps energy high



Closure

- Summarize group's conclusions
- Ask for **divergent and additional thoughts**
- **Check with study sponsor** for additional questions
- Thank participants & give them their honorariums



The art of asking great questions



Begin with the end in mind

- A well-crafted objective serves as the guiding light for the study

“POBA” area + target audience + key topic area or issues to be explored -> **use 30 words or less**

Example:

“To gain an understanding of special educator’s attitudes towards technology in their classroom and to learn the opportunities and barriers for our product.”



You want people to hear & respond to each other's opinions

SET A CLIMATE FOR OPEN COMMUNICATION

- Your questions need to be **clear, simple, jargon-free** and support the study objective
- Ask “quick questions” that lead to “long answers”
- Participants should do 80% of the talking



Question Types

- ***Introductory*** – designed to get people thinking about a topic
- ***Follow up*** – most common, sheds more light on a comment
- ***Open-ended*** – encourages broad thinking
- ***Close-ended*** - puts people back on track, summarizes consensus, draws shy people out



Probes

A very special type of question – allows you to explore new terrain

SOME EXAMPLES OF PROBES

- “How so”?
- “What motivated you to do this?”
- “Please follow that thought further”
- “What factors played into your decision?”
- “What else should I be asking?”

Stay within participant’s comfort zone!



Interventions

LITTLE ACTIVITIES THAT BREAK THINGS UP

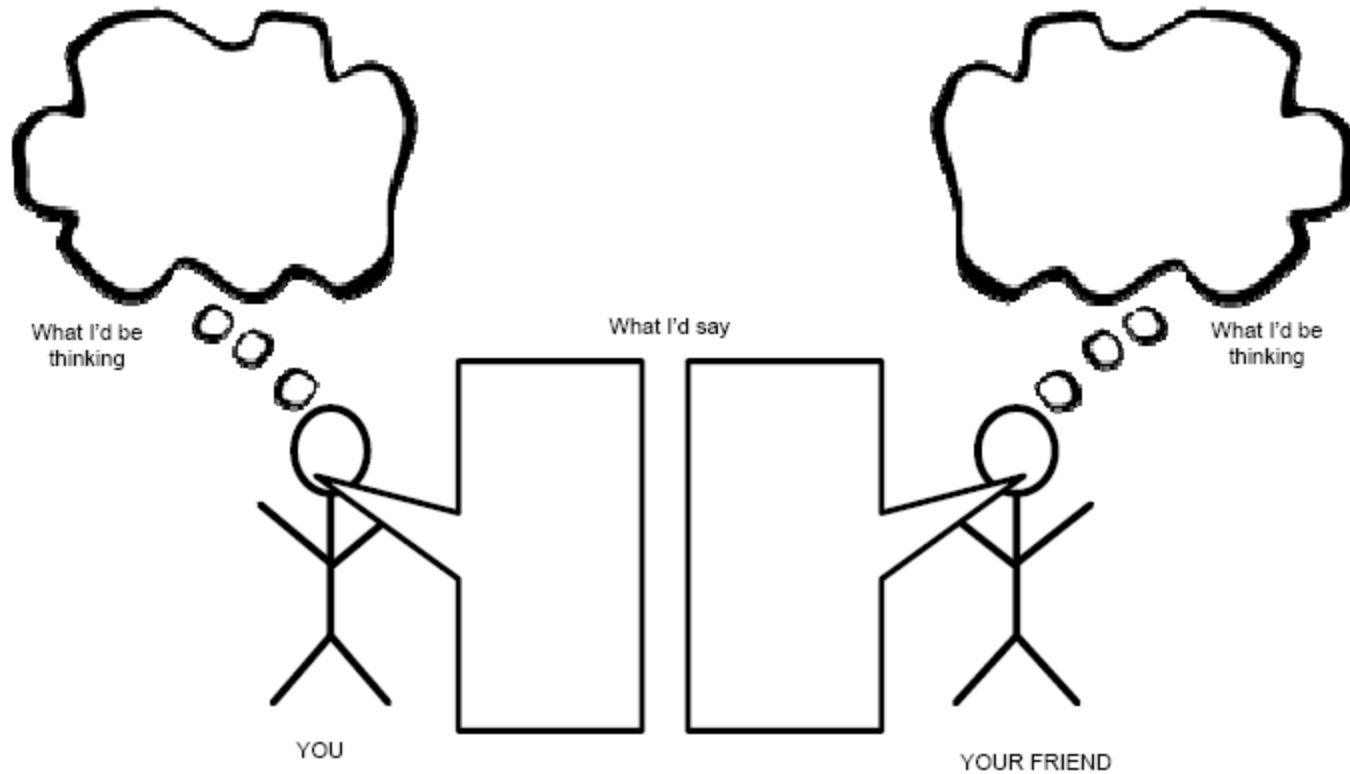
Examples of an intervention:

- Can be as simple as taking a poll or writing comments on an easel ...or as complex as doing a collage
- Typical interventions -> showing product concepts, ad copy, card or picture sorts



Interventions get below the surface

Your friend just told you they have been diagnosed with diabetes



New remote methods



Online focus groups remove logistical hassles



But you miss their physical presence & body language



Online bulletin boards provide depth

Best choice when

- You need a lot of information on a topic
- Anonymity delivers richer insights

The screenshot shows a web browser window with the address bar displaying a URL from 2020research.com. The page content includes a moderator's message and two user replies.

Jennifer Tyson (Moderator)

Welcome! We're going to spend the next few days talking about your personal cell phone usage. I'd like to start off our discussion by having you introduce yourself. Go ahead and **REPLY** to this question below and tell me a little about yourself!

Jim Smith (Online) September 5, 2009, 3:30 PM

Hi... my name is Jim Smith and I'm 33 years old. I've had a cell phone for about 12 years. Sprint has been my carrier for the entire time I've had a phone.

I live with my wife and kids in Philadelphia, PA. Go EAGLES! 😊

NEW! Mark Jones September 6, 2009, 12:46 PM

You can type your answer in here! You can use any of the formatting options above, just like in other applications!

You can have 15-20 participants contributing over several days



Resources

TRAINING

- RIVA MARKET RESEARCH, Bethesda MD <http://www.rivainc.com/>
- BURKE INSTITUTE, Cincinnati OH <http://www.burke.com/>
- LIVINGSTON GROUP, Windham NH
<http://www.projectivetechniques.com/>

ORGANIZATION

QRCA (Qualitative Research Consultants Organization) www.QRCA.org

BOOKS

“Beyond Listening”, Goebert & Rosenthal, Wiley, 2002

“Hidden Art of Interviewing People”, McPhee & Terry, Wiley, 2007

“The Mirrored Window”, Langer, PMP, 2001

“Moderating to the Max” Bystedt, etal, PMP Books, 2003

“Qualitative Market Research”, Mariampolski, Sage, 2001



About us

Kay Corry Aubrey, Usability Researcher

Kay Corry Aubrey is the owner of Usability Resources, which specializes in user-centered research and design. Kay has over 20 years of experience in applying qualitative research methods and usability testing to technology-oriented products and collaborative software. She has led user research and usability and design efforts for dozens clients including AT&T, Affinova, Constant Contact, Monster Worldwide, the Massachusetts Medical Society, the Mayo Clinic, and iRobot.

Kay has taught at Northeastern University and Bentley University's Center for Human Factors and Information Design. She is the managing editor of the *QRCA VIEWS* magazine, a market research journal that is read by over 5,000 qualitative research consultants and buyers. Kay has an MSW from Boston University's School of Social Work, an MS in information systems from Northeastern University's Graduate School of Engineering, and a BA from McGill University. She is a RIVA-certified Master Moderator who enjoys doing research with both groups and individuals.

For further information on Kay's background, please visit www.UsabilityResources.net or contact her at Kay@UsabilityResources.net.

QUESTIONS???

Thank you!!!