

PRODUCT TESTING

Focus Group Moderator's Guide

Plan, recruit, moderate and analyse focus groups: screener, discussion guide, moderator techniques and a reporting structure.

- ✓ Free to use
- ✓ No signup needed
- ✓ Print-optimized

Focus Group Moderator's Guide

Plan, recruit, moderate and analyse focus groups: screener, discussion guide, moderator techniques and a reporting structure.

Focus Group Moderator's Guide

Run Professional Focus Groups That Deliver Actionable Insights

Introduction

Focus groups remain one of the most powerful qualitative research methods. This guide provides everything you need to plan, moderate, and analyze focus groups like a professional researcher.

What You'll Learn:

- Complete moderator techniques
- Question frameworks for different objectives
- Participant management strategies
- Analysis and reporting templates

Part 1: Focus Group Fundamentals

When to Use Focus Groups

Objective	Focus Group Fit	Better Alternative
Explore new concepts	✓ Excellent	-
Understand "why" behind behavior	✓ Excellent	-
Generate new ideas	✓ Excellent	-
Test messaging/positioning	✓ Good	1:1 interviews for sensitive topics
Evaluate packaging/design	✓ Good	Eye-tracking for detailed analysis
Quantify preferences	× Poor	Survey research
Measure market size	× Poor	Quantitative research
Sensitive personal topics	× Poor	1:1 interviews

Ideal Focus Group Composition

Size:

- Minimum: 6 participants
- Optimal: 8-10 participants
- Maximum: 12 participants

Homogeneity Principle: Participants should share relevant characteristics to encourage open discussion:

- Similar product usage level
- Similar demographics (broadly)
- Similar decision-making role

Diversity Within Homogeneity:

- Mix of genders (unless gender-specific topic)
- Mix of specific experiences within the category
- Avoid friends/family in same group

How Many Groups Do You Need?

Research Scope	Minimum Groups	Recommended
Single segment, one market	2	3-4
Two segments, one market	4	6
Single segment, two markets	4	6
Complex segmentation	6+	8-12

Rule of Thumb: You need saturation—when new groups stop revealing new insights. The table is a planning starting point, not a benchmark; stop adding groups when they stop telling you something new.

Part 2: Recruitment & Screening

Screener Development

Essential Screener Components:

1. **Security Questions** (filter out professional respondents)
 - "In the past 6 months, have you participated in any market research?"
 - "Do you or does anyone in your household work in [industry/marketing/research]?"
2. **Category Qualification**
 - Usage frequency
 - Purchase recency
 - Brand awareness/usage
3. **Articulation Check**
 - Open-ended question to assess ability to express thoughts
 - "In your own words, describe what you look for when choosing [product category]"

4. Demographics

- Age, gender, location, income (as relevant)

5. Logistics

- Availability for scheduled times
- Transportation/technology access

Sample Screener Template

SCREENER: [Product Category] Focus Groups

INTRODUCTION:

"Hi, I'm calling from [Research Company] about an upcoming research study. This is not a sales call. We're looking for people to participate in a paid discussion about [general topic]. May I ask you a few questions?"

Q1. SECURITY – TERMINATE IF YES

Have you or anyone in your household worked in any of the following industries?

- ☐ Advertising/Marketing
- ☐ Market Research
- ☐ [Relevant competitive industry]
- ☐ None of the above ← CONTINUE

Q2. SECURITY – TERMINATE IF YES

Have you participated in a focus group or interview for market research in the past 6 months?

- ☐ Yes ← TERMINATE
- ☐ No ← CONTINUE

Q3. CATEGORY QUALIFICATION

How often do you [use/purchase] [product category]?

- ☐ Daily ← CONTINUE
- ☐ Weekly ← CONTINUE
- ☐ Monthly ← CONTINUE
- ☐ Less than monthly ← TERMINATE
- ☐ Never ← TERMINATE

Q4. BRAND USAGE (if relevant)

Which of the following brands have you [used/purchased] in the past 3 months?
[List brands – use for segmentation]

Q5. ARTICULATION CHECK

In a few sentences, please describe what's most important to you when choosing a [product category].

[RECORD VERBATIM – Screen for articulate responses]

Q6. DEMOGRAPHICS

[Age, gender, income, etc. as needed]

Q7. AVAILABILITY

We're conducting research sessions on [dates/times]. Are you available?

[Confirm logistics]

INVITATION:

"Based on your responses, we'd like to invite you to participate in a

90-minute discussion on [date] at [time]. You'll receive [\$X] for your participation..."

Recruitment Best Practices

Over-recruit to cover no-shows:

- Example: 8 participants needed → recruit 10
- Size the buffer from your own or your recruiter's no-show history for this audience

Confirmation Sequence:

Timing	Action
Booking	Send confirmation email with details
1 week before	Reminder email
2 days before	Phone/text confirmation, reconfirm details
Day before	Final reminder with directions
Day of	Morning-of reminder (for afternoon sessions)

Part 3: Discussion Guide Development

Guide Structure

Standard 90-Minute Flow:

Section	Duration	Purpose
Welcome & Ground Rules	5-10 min	Set expectations
Warm-up	10 min	Build rapport
Main Discussion	50-60 min	Core research questions
Stimulus Reaction	15-20 min	Concept/material review
Summary & Close	5-10 min	Final thoughts

Discussion Guide Template

FOCUS GROUP DISCUSSION GUIDE

Project: [Project Name]
Date: [Date]
Groups: [Group descriptions]
Duration: 90 minutes

SECTION 1: WELCOME & INTRODUCTION (10 minutes)

[Moderator enters, participants seated]

"Good [morning/evening], everyone! Thank you for joining us today. My name is [Name], and I'll be leading our discussion.

Before we begin, let me share a few ground rules:

- There are no right or wrong answers. We want YOUR honest opinions.
- Please speak one at a time so we can hear everyone.
- Feel free to disagree with others—different perspectives are valuable.
- We're recording this session [point to equipment] for research purposes only.
- Please turn off cell phones or set to silent.
- Refreshments are available—help yourself throughout.
- Restrooms are located [direction].
- We'll be here for about 90 minutes.

Any questions before we start?"

[Address any questions]

SECTION 2: WARM-UP (10 minutes)

"Let's go around the room and introduce ourselves. Please share:

- Your first name
- What you do for work
- [One category-relevant warm-up question]"

[Go around room, take notes on each participant]

Transition: "Great, thanks everyone. Now let's dive into our topic today..."

SECTION 3: GENERAL CATEGORY DISCUSSION (20 minutes)

TOPIC 3A: Category Usage & Behavior

"Let's talk about [product category] in general."

- When you think of [category], what comes to mind first?
- How does [category] fit into your daily/weekly routine?
- Walk me through a typical [usage occasion]. What happens?

PROBE: Who, what, when, where, why, how

TOPIC 3B: Decision Drivers

"Now I'd like to understand how you make choices in this category."

- What factors matter most when you're choosing [product]?
- How do you evaluate different options?
- What would make you switch from your current [product/brand]?

[MODERATOR: Listen for hierarchy of needs, trade-offs, deal-breakers]

TOPIC 3C: Pain Points & Unmet Needs

- What frustrates you about [category] today?
 - What's missing from current options?
 - If you could wave a magic wand, what would the perfect [product] do?
-

SECTION 4: BRAND/COMPETITIVE DISCUSSION (15 minutes)

"Now let's talk about specific [brands/products] you're aware of."

- What brands come to mind in this category?
[Write on flipchart as mentioned]
- For each brand mentioned:
 - What's your perception of [Brand]?
 - Who do you think [Brand] is designed for?
 - What's [Brand] best at? Worst at?
- Which brands have you tried? Currently use?

[MODERATOR: Look for positioning white space, competitive vulnerabilities]

SECTION 5: CONCEPT/STIMULUS EXPOSURE (20 minutes)

"Now I'd like to show you something and get your reactions."

[DISTRIBUTE STIMULUS – concepts, packaging, ads, etc.]

"Please take a moment to review this. Don't share your thoughts yet—I want your individual first impressions."

[Allow 2–3 minutes for review]

Initial Reactions (go around room):

- What was your first thought when you saw this?
- What stands out to you?

Group Discussion:

- What do you like about this?
- What concerns you or what don't you like?
- Who do you think this is designed for?
- How does this compare to what's available today?
- Would you be interested in this? Why/why not?
- What would make this more appealing?

[IF TESTING MULTIPLE CONCEPTS: Repeat for each, then compare]

Comparison:

- Looking at all [X] concepts, which appeals to you most? Why?

- Which would you be most likely to [buy/use/try]?

SECTION 6: WRAP-UP (10 minutes)

"We're coming to the end of our discussion. A few final questions:"

- What's the most important thing [Company/Brand] should know?
- Is there anything we didn't discuss that you wanted to share?
- Any advice for [Company] as they develop this [product/concept]?

"Thank you so much for your time and insights today. Your feedback is incredibly valuable. [Explain incentive distribution process]"

[END RECORDING]

DEBRIEF NOTES (Complete immediately after session)

Key Themes:

Surprising Findings:

Quotes to Remember:

Participant Dynamics:

Comparison to Previous Groups:

Hypotheses to Explore:

Part 4: Moderator Techniques

The 7 Essential Moderator Skills

1. Active Listening

- Maintain eye contact
- Nod and use verbal affirmations ("I see," "Interesting")
- Reflect back what you hear
- Don't plan next question while participant is speaking

2. Probing

Probe Type	When to Use	Example
Clarification	Vague responses	"Can you explain what you mean by 'better'?"
Elaboration	Surface-level answers	"Tell me more about that."
Reasoning	To understand "why"	"What makes you say that?"
Example	Abstract concepts	"Can you give me an example?"
Comparison	Relative judgments	"How does that compare to...?"
Feeling	Emotional responses	"How did that make you feel?"

3. Redirecting

- "That's interesting. [Name], what do you think?"
- "Let's hear from someone who hasn't spoken yet."
- "I want to come back to something [Name] said earlier..."

4. Managing Dominators

- Avoid eye contact with dominator
- Use name and redirect: "[Dominator], thanks. [Quiet person], your thoughts?"
- Use round-robin technique: "Let's go around the room."
- Private note during break if needed

5. Drawing Out Quiet Participants

- Direct questions by name
- "We haven't heard from this side of the table..."
- Use written exercises before discussion
- Ask easier, factual questions first to build confidence

6. Keeping on Track

- "That's an interesting point. For today, I want to focus on..."
- Check watch/time regularly
- Summarize and transition: "So we've talked about X, now let's move to Y."

7. Remaining Neutral

- Never agree or disagree with participants
- Use neutral probes: "Interesting" not "Good point!"
- Don't show surprise or disappointment
- If asked your opinion: "I'm here to learn from you."

Handling Difficult Situations

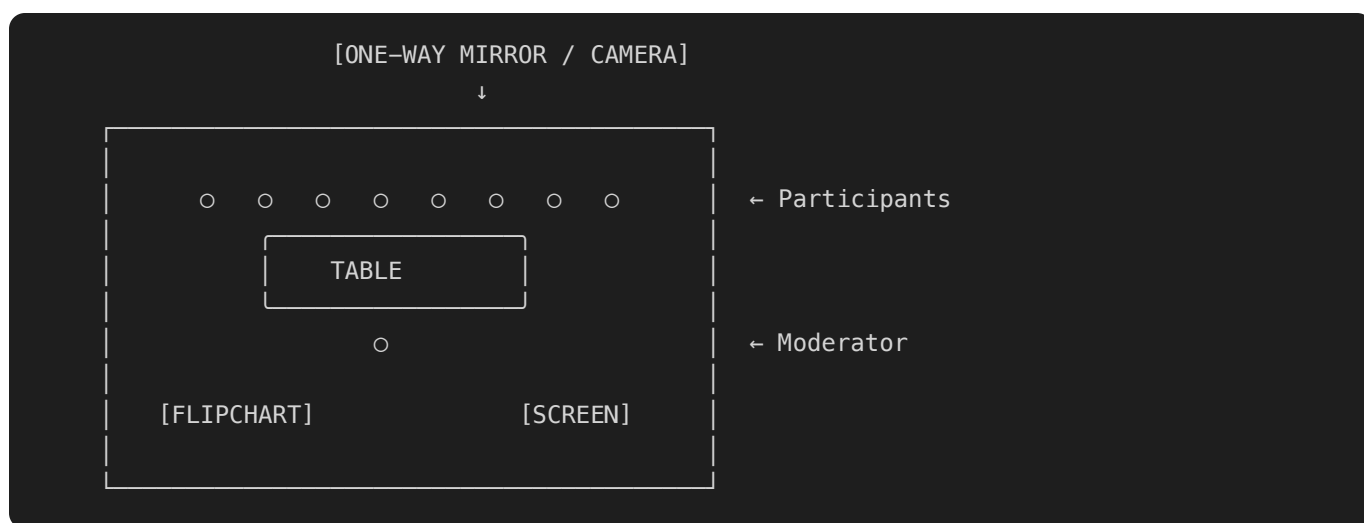
Situation	Response
Participant goes off-topic	"That's interesting. Let's note that and come back to our focus on..."

Situation	Response
Two participants arguing	"You both raise good points. Let's hear what others think."
Participant gets upset	"I appreciate you sharing that. Let's take a moment..."
Technical difficulties	Stay calm, have backup plan, fill time with discussion
Group consensus too quickly	"Devil's advocate—what might be a concern with that?"
No one wants to speak first	Use round-robin or start with a written exercise

Part 5: Facilities & Logistics

Room Setup

Ideal Configuration:



Checklist: Facility Requirements

Room:

- ☐ Adequate size for group (minimum 200 sq ft)
- ☐ Climate control
- ☐ Comfortable seating
- ☐ Good lighting
- ☐ Sound insulation
- ☐ Client observation capability (mirror or video feed)

Equipment:

- ☐ Recording equipment (audio/video)
- ☐ Backup recording device
- ☐ Flipchart and markers
- ☐ Screen/TV for stimulus display
- ☐ Laptop with presentation software
- ☐ Timer/clock visible to moderator

- ☐ Name tents and markers
- ☐ Notepads and pens for participants

Supplies:

- ☐ Refreshments (coffee, water, light snacks)
- ☐ Printed materials (screeners, discussion guide, stimuli)
- ☐ Incentive envelopes (prepared with cash/checks/gift cards)
- ☐ Receipt forms for incentive tracking
- ☐ Consent forms
- ☐ Name tags/badges

Day-of Timeline

Time	Activity
-60 min	Arrive, set up room, test equipment
-45 min	Brief observers, review guide
-30 min	Participant arrival begins
-15 min	Greet participants, offer refreshments
-5 min	Complete consent forms, seat participants
0 min	Session begins
+90 min	Session ends, distribute incentives
+105 min	Immediate debrief with observers

Part 6: Analysis & Reporting

Real-Time Analysis

During Each Group:

- Note key quotes verbatim
- Track themes on a matrix
- Note non-verbal cues
- Identify outliers vs. consensus

Between Groups:

- Quick debrief with team
- Emerging hypothesis check
- Adjust guide if needed (sparingly)

Post-Research Analysis Framework

Step 1: Organize Data

- Transcribe sessions (or use notes)
- Code responses by theme
- Create participant profiles

Step 2: Theme Identification

Theme	Group 1	Group 2	Group 3	Group 4	Frequency
[Theme A]	✓✓	✓✓✓	✓	✓✓	8 mentions
[Theme B]	✓	✓✓	✓✓	✓✓	7 mentions
[Theme C]	✓✓✓	✓		✓	5 mentions

Step 3: Quote Selection For each key finding, collect 2-3 supporting quotes:

- Representative quotes (typical view)
- Insightful quotes (unique perspective)
- Extreme quotes (with context)

Step 4: Insight Development

Observation → Insight → Implication

Observation	Insight	Implication
Participants struggled to explain X	X is not a conscious decision factor	Don't use X as a messaging pillar
All groups mentioned Y concern	Y is a major barrier to trial	Address Y directly in communications
Mixed reactions to concept A	Concept appeals to specific segment	Consider segment-specific versions

Reporting Template

FOCUS GROUP RESEARCH REPORT

EXECUTIVE SUMMARY

Research Objective:
[What we set out to learn]

Methodology:

- [X] focus groups conducted
- [N] participants total
- Fielded [dates]
- Markets: [locations]
- Segments: [segment descriptions]

Key Findings:

1. [Finding 1 with 1-sentence evidence]

2. [Finding 2 with 1-sentence evidence]
3. [Finding 3 with 1-sentence evidence]

Recommendation:

[Clear recommendation based on findings]

DETAILED FINDINGS

FINDING 1: [Title]

What we heard:

[Summary of the finding]

Supporting evidence:

- "[Quote 1]" – [Participant profile]
- "[Quote 2]" – [Participant profile]

Segment differences (if any):

[How this varied by segment]

Implication:

[What this means for the business]

[Repeat for each major finding]

STIMULUS/CONCEPT EVALUATION

Concept A: [Name]

Overall reaction: [Positive/Mixed/Negative]

Strengths:

- [Strength 1]
- [Strength 2]

Concerns:

- [Concern 1]
- [Concern 2]

Optimization suggestions:

- [Suggestion 1]
- [Suggestion 2]

Purchase/interest intent: [High/Medium/Low]

[Repeat for each concept]

RECOMMENDATIONS

Based on this research, we recommend:

1. [Recommendation 1]

Rationale: [Why, citing findings]

2. [Recommendation 2]

Rationale: [Why, citing findings]

3. [Recommendation 3]

Rationale: [Why, citing findings]

Next Steps:

- [Recommended follow-up research]
- [Recommended actions]

APPENDIX

- A. Discussion Guide
- B. Participant Profiles
- C. Full Concept Boards
- D. Additional Quotes

Part 7: Virtual Focus Group Adaptations

Platform Selection

Platform	Best For	Limitations
Zoom	General discussions, screen sharing	Participant tech comfort varies
FocusVision	Professional research, client viewing	Cost
Recollective	Async + live discussions	Learning curve
Teams/Meet	Internal/B2B research	Less research-specific features

Virtual Moderation Adjustments

Technology Prep:

- Send tech check email 48 hours before
- Have backup phone number for every participant
- Use waiting room feature
- Disable participant screen sharing (until needed)
- Record to cloud and locally

Engagement Techniques:

- More frequent round-robins (can't read body language as easily)
- Use chat for quick polls
- Use annotation tools for stimulus
- Shorter sessions (60-75 min max)
- More structured turn-taking

Virtual Ground Rules to Add:

- "Please stay on camera throughout"
 - "Use a quiet location with stable internet"
 - "Close other applications"
 - "Use headphones if possible"
-

Test the Product at Home with Portifer

Portifer does not run focus groups or live interviews. It complements them: after the groups, put the product in people's homes and collect feedback from real use.

- Testers from your own lists, HubSpot or the UserLabs tester community
- Shipping through your own carrier accounts or a fulfilment partner
- Surveys plus photo and video feedback, with video transcription
- Automatic summaries and sentiment scoring of responses

See how it works → portifer.com

Great insights come from great conversations.

Version 1.0 | December 2024

TAKE THE NEXT STEP

Run your next product test in Portifer

Testers, shipping, surveys and photo and video feedback in one campaign.

Run your next product test in Portifer

Testers, shipping, surveys and photo and video feedback in one campaign.

[Visit portifer.com](https://portifer.com)

portifer.com/en?utm_source=lead_magnet&utm_medium=pdf&utm_campaign=focus-group-moderator-guide

