BEST PRACTICES FOR CONDUCTING SUCCESSFUL ONLINE FOCUS GROUPS

Abstract

The COVID-19 pandemic required researchers to halt in-person research and modify research methods for a virtual setting. This publication describes the process by which one research team consisting of faculty, staff, and students across a large research institution in the Pacific Northwest successfully pivoted in-person focus groups to an online setting using Zoom. We outline best practices for conducting online focus groups based on a literature review and our firsthand experience. Overall, we found online focus groups to be a cost-effective means for gathering qualitative data that reduced some barriers to participation.

Introduction

Focus groups are a valuable qualitative research method used to gather an array of opinions, perceptions, and experiences on particular topics from specific populations (Barbour and Schostak 2011; Esterberg 2002). Within Extension, focus groups have been used to explore program feasibility, barriers to participation, and health perceptions (Avent and Jayaratne 2017; Brown et al. 2020; Stotz et al. 2019). While focus groups have traditionally been conducted in person, advances in technology and internet accessibility have prompted researchers to explore online focus groups (OFG). The COVID-19 pandemic served as an additional catalyst to understand OFG feasibility.

Background

OFGs have several advantages over in-person focus groups both from a participant and researcher perspective. These include increasing accessibility by eliminating geographical or travel barriers, increasing participant diversity, and cost reduction (Jiang and Cohen 2020; Rivaz et al. 2019; Wirtz et al. 2019). OFGs provide additional benefits to research teams, including secure audiovisual recording, participant authentication, and transcription. Evidence indicates OFGs have been shown to increase rapport with participants in comparison to in-person focus groups (Archibald et al. 2019). However, OFGs also present technological challenges, including participant technological literacy, internet connectivity, and call quality and reliability (Jiang and Cohen 2020). Some of these challenges can be addressed through preparatory measures such as providing technical support during the OFG (Tenney 2016; Tuttas 2015).

A team of Washington State University (WSU) researchers from the Department of Human Development and Extension Youth and Family Unit planned to conduct focus groups between March and October 2020. However, due to the COVID-19 pandemic, our research team pivoted to OFGs using Zoom videoconferencing software. This article describes best practices for conducting OFGs. All included best practices are derived from a literature review and authors' firsthand experience.

Conducting Online Focus Groups Using Zoom

In this section, we will summarize factors to consider when conducting OFGs based on guiding literature and experiences of our research team.

Platform Selection

Zoom was selected as the OFG platform based on literature review findings suggesting increased researcher satisfaction, improved participant registration, accurate recording and data

collection capabilities, and existing access to a university license (Archibald et al. 2019; Dangerfield II et al. 2021; Dos Santos Marques et al. 2021; Matthews et al. 2018). Zoom privacy settings increased confidentiality, including renaming participants, restricting private messaging, and limiting participants from saving chat messages (see Appendix A). Participants were sent a "Zoom Guide" providing instructions for using basic Zoom features, as well as what to expect during the OFG (see Appendix B).

Participant Recruitment

Recruitment was conducted via email and an online interest survey. Since OFGs were conducted in Spanish and English, recruitment materials were available in both languages. Participants were incentivized with a $20 electronic gift card, which allowed for online delivery and tracking.

Focus Group Preparation

Prior to the OFG, participants reviewed a consent form through Qualtrics (Halliday et al. 2021). Participants signed digitally and could download a copy of the form for their records. The informed consent agreement was reviewed during the OFG to allow participants to ask questions of study personnel (Archibald et al. 2019).

An OFG protocol helped to maintain fidelity across facilitators in Spanish and English languages. The protocol included a study introduction, overview of the process, technology logistics (i.e., how to use Zoom), a group building activity, and discussion questions. All OFG materials were approved by the WSU Institutional Review Board. Three personnel were available, including a facilitator (i.e., to lead the OFG), co-facilitator (i.e., to monitor the chat and for timekeeping), and on-call technological support. In our experience, on-call support was not needed.

OFG Facilitation

Participants received a Zoom guide by email prior to the OFG. The Zoom guide provided an overview of how to use Zoom, including how to change their display name to protect individual privacy, as well as what to expect during the OFG. If participants joined Zoom without changing their display name, facilitators provided instructions on how to do so to protect individual privacy (Halliday et al. 2021). Next, facilitators displayed a PowerPoint slide deck reviewing the OFG timeline, technology logistics, Zoom etiquette, and a review of informed consent (Daniels et al. 2019).

The PowerPoint was ended as the discussion for the OFG questions began, allowing the facilitator and co-facilitator to see all participant videos. OFG questions were asked aloud by the facilitator and typed into the chat feature by the co-facilitator.

To assess participant satisfaction with the OFG, we conducted a brief post-focus group feedback survey. The survey captured prior experience with in-person and OFGs and satisfaction with the current experience. It was distributed to participants in a post-focus group follow-up email using an anonymous Qualtrics link.

Results

Four OFGs with approximately five participants per group were conducted virtually, each lasting approximately 90 minutes. The number of participants in the OFGs is consistent with current literature suggesting a maximum of six participants per OFG (Daniels et al. 2019; Flynn et al. 2018; Kite and Phongsavan 2017).

Post-focus Group Survey

Eight participants completed an anonymous post-focus group survey. Six participants had prior in-person focus group experience and three had OFG experience. All respondents "strongly agree" to feeling comfortable expressing their opinions in the OFG setting and would participate in an OFG again. Seven respondents "strongly disagree" that problems with technology limited their ability to express their opinions in the OFG, while one respondent who had never participated in a focus group before reported "neither agree nor disagree."

Table 1 outlines the benefits of OFGs from authors' experience. Table 2 outlines the OFG barriers and recommendations to address barriers. Table 3 lists best practices for OFGs as recommended from authors' experience.

Table 1. Benefits of online focus groups.

	Benefits
Participant engagement	• Participants can join the OFG from geographically distant locations, including rural and urban areas. • Additional transportation to and from the OFG is not needed.
Equity in participation	• Facilitators can clearly identify and track participant engagement on a single screen, which allows facilitators to equitably elicit feedback from all participants.
Chat feature	• Participants can share their thoughts using chat while others are speaking. • Participants can use chat to share opinions they may not feel comfortable sharing verbally. • Co-facilitator can type OFG questions into the chat, providing a visual reference to the question the facilitator asks out loud.
Cost effective	• Participants can be offered a higher incentive since the OFG eliminates in-person expenses such as space rental, transportation, lodging, and refreshments. • Transcript is generated by Zoom, which allows for additional cost savings for transcription services.

Table 2. Barriers and recommendations addressing barriers to online focus groups.

	Barrier	Recommendations
Decreased participant attendance	Participants with limited technological literacy or access may be unable to join the OFG.	• Distribute technology for participants to borrow for use during OFG. • Give participants the option to join an OFG facilitator on Zoom at least 30 minutes prior to the start of the OFG to ask questions if needed.
Zoom license restrictions	Participants without a Zoom account may be unable to join the OFG due to university Zoom license requirements.	• Provide instructions for setting up a Zoom account prior to the OFG. • Offer technical support 30 minutes before the start of the OFG. • Request ability to override license restrictions from university.
Participant confidentiality	Participants can be identified by their on-screen username.	• Ask participants to remove their last name from their Zoom username. • Set expectations around privacy at the beginning of the OFG. • Ask participants to avoid taking screenshots. • Disable participants' ability to save the chat file. • Disable participants' ability to chat with individual participants other than facilitators.
Participant attention	Participants may have a reduced attention span while using an online platform.	• Limit OFG duration to a maximum of 90 minutes. • Set expectations for minimizing other online distractions (e.g., email in the background). • Use an icebreaker to help participants engage and connect with the group, increasing attention span. • Share the focus group agenda in advance to help participants anticipate timing, actively engage, and plan for breaks.

Table 3. Online focus group best practices.

	Best practice recommendation
Platform selection	• Select an online platform convenient and accessible to research staff and participants with audiovisual recording and transcription features (e.g., Zoom).
Participant recruitment	• Schedule no more than six to eight participants in each OFG for maximum engagement. • Provide incentives (e.g., e-gift cards) to participants.
Preparation	• Establish a clear OFG protocol with specific timing laid out for each question to provide structure and fidelity for facilitators. • Designate roles and responsibilities for the facilitator, co-facilitator, and on-call technology personnel for an efficient and smooth OFG experience. • Share a "What to expect in the focus group" document with all participants prior to the OFG. • Use your platform of choice to implement added privacy and security features prior to the start of the OFG (Appendix A).
Implementation	• Share information about Zoom etiquette to allow participants to ask questions about varying functions of Zoom and ensure participants are on the same page prior to beginning the OFG. • Begin with brief introductions and an ice breaker (e.g., tell us something boring about yourself) to create a welcoming and safe environment.

Conclusion

The omnipresence of technology in today's world highlights the increasing importance of virtual research methods. Understanding best practices for using these methods for data collection is critical in obtaining reliable, representative data, sustaining current research amid unforeseen challenges, and maintaining relationships with funding agencies. Our research team found OFGs were a cost-effective means for gathering qualitative data that reduced participation barriers and allowed inclusion of a geographically diverse group of participants. The recommendations summarized here provide an outline for other Extension research teams to successfully conduct OFGs using Zoom.

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Appendix A

Recommended Zoom Settings

After setting up the Zoom meeting, we recommend the following general meeting settings as seen in Table 1A.

Table 1A. Recommended general Zoom settings.

General Zoom settings	Reason
Require registration	• Track expected participants. • Helps to limit the number of participants to the recommended number for each OFG.
Require meeting passcode or use the waiting room feature	• Allows only registered or invited participants to join.
Allow for both telephone and computer audio	• Increases accessibility options for participants.
Enable participants to join before the meeting host	• Allows participants to make sure they can log in and join the meeting prior to the start of the OFG.
Enable waiting room	• Allows facilitator(s) time to set up for the OFG prior to participants joining.
Set up alternative host(s)	• Should the meeting host lose internet connectivity, this will allow others to facilitate the rest of the OFG.
Prevent participants from saving the chat	• Increases privacy for participants.
Allow participants to rename themselves	• Increases privacy for participants by allowing them to only use first names.
Allow nonverbal feedback	• Allows participants to express themselves with emojis in response to content shared.

After selecting the appropriate general settings and saving your edits, you should see additional tabs for registration, email, and branding. Settings we recommend for registration can be found in Table 2A below.

Table 2A. Recommended Zoom registration settings.

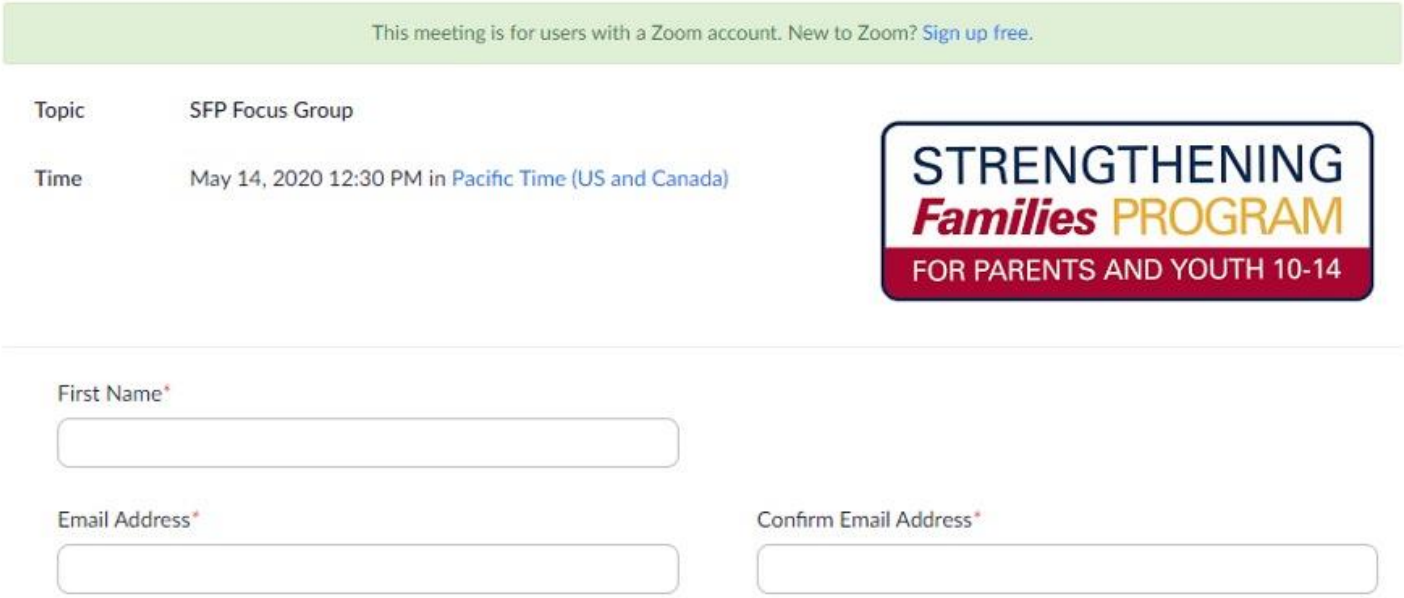
Zoom registration settings	Reason
Automatically approve registration	• Eliminates administrative burden.
Send an email to the host	• Allows host to keep track of registered participants.
Close registration after meeting date	• Eliminates accidental additional registrations for an expired meeting.
Allow attendees to join from multiple devices	• Increases accessibility for participants.
Enable waiting room	• Allows facilitator(s) time to set up for the OFG prior to participants joining.
Set up alternative host(s)	• Should the meeting host lose internet connectivity, this will allow others to facilitate the rest of the OFG.

Appendix B

Zoom Guidelines for Strengthening Families Program for Parents and Youth 10-14 (SFP 10-14) Focus Group Participants

How to Register for the SFP 10-14 Focus Group Meeting:

1. Click on the SFP 10-14 Focus Group Meeting registration link you received in the confirmation email from [INSERT INDIVIDUAL AND EMAIL].
2. Enter your first name or preferred name ONLY on the registration page. This is how your name will appear in the meeting, so please enter your first name only to help protect your privacy.
3. Enter your preferred email address. This is the email address where you will receive the link to your $20 Amazon gift card 24 hours after the conclusion of the focus group.



How to Join the SFP 10-14 Focus Group Meeting on Zoom:

On the day of your scheduled focus group, please join the SFP 10-14 Focus Group Meeting 10–15 minutes before it is scheduled to begin.

Option 1: Join via Meeting URL

1. Open the email or calendar invite that contains a link to the prescheduled meeting, and click the URL to join the Zoom meeting.

Option 2: Join through Desktop Client Using the Meeting ID

1. Open the Zoom desktop app.
2. Click on the Home button.
3. Click Join and type in the provided Meeting ID and your name.

What to Expect during the Focus Group:

Prior to the Focus Group: Removing Your Personal Identification (Name) from Zoom

- **Option 1: while on the Zoom call**
  - Click the three dots at the top right of your video screen.
  - Click Rename from the dropdown menu.
  - Edit your Display Name to a preferred name, which at a minimum does *not* include your last name.
  - Click Rename to save your new display name.
  - Your new display name will appear in the lower lefthand corner of your video screen.
- **Option 2: via Zoom web portal**
  - Sign into Zoom (https://zoom.us/signin#/login).
  - Click Profile at the top of the lefthand menu.
  - Click Edit at the top right, located next to your name.
  - Edit your Display Name to a preferred name, which at a minimum does *not* include your last name.
  - Scroll to the bottom of the screen and select the blue Save button.
  - Log into your Zoom meeting and you should see your new display name.
- **Option 3: on the Zoom app on your cell phone**
  - Log into the Zoom app on your cell phone.
  - Select Settings in the bottom-right corner.
  - Select the button with your name and email at the top of the screen.
  - Select Display Name to edit.
  - Edit your Display Name to a preferred name, which at a minimum does *not* include your last name.
  - Select Save at the top right.

Part I: Waiting Room (5 minutes)

- When you join the meeting, you will first enter the Waiting Room.
- Please use this time to make sure that your display name is your first name only or preferred name. Please also ensure that your video feed does not include any personal objects that could identify you. This is to maintain your privacy.
- You will be admitted into the meeting at the scheduled start time.

Part II: Introduction and Informed Consent (15 minutes)

- The focus group will consist of six to ten participants and two research personnel. The research personnel will include the facilitator and one support staff.
- The facilitator will wait for a minimum of four participants to arrive to the focus group before beginning. If less than four participants arrive to the meeting, the focus group will be rescheduled.
- The facilitator will review the purpose of the research and will ask for your consent to begin the focus group. They will also ask for your consent to record the focus group. If you do not wish to provide consent, you will be able to leave the focus group at this time.
- Participants who arrive more than 15 minutes late to the focus group will not be able to join. These participants will be contacted via email to reschedule for a future group.

Part III: Focus Group Discussion (60–90 minutes)

- The facilitator will begin by having all attendees introduce themselves by first name only.
- The facilitator will then ask questions regarding your experience with Strengthening Families Program 10–14 and your opinions on how to adapt the program content to address new substances.
- Please raise your hand prior to speaking so that we can see who would like to contribute to the conversation without having multiple people talk at once.

- You may respond to questions verbally or you may type your responses to questions in the chat box. Anything you type in the chat box will be visible to all participants.
- When you are not speaking, please keep your microphone on "mute" to prevent background noise.
- Please minimize distractions, such as the use of phone and checking email during the focus group.
- If you decide that you do not want to participate after the focus group begins, that is okay. Please let the facilitators know before you leave the meeting. To leave the focus group, you will press the red Leave button on the lower right-hand side of the screen.
- Please do not share what other participants say with people outside of the focus group. Please do not copy, paste, or take screenshots of the comments in the chat feature or the focus group.

Part IV: Wrap-up (5 minutes)

- At the conclusion of the focus group, the facilitator will ask you to complete a short survey on your experience as a member of this focus group.
- After the focus group ends, you will receive an email to the address you used to register for the focus group that contains instructions for how to collect your $20 gift card. The electronic gift card will be sent to the email address you used to register for the focus group. Only those individuals who participate in the entire focus group are eligible to receive the gift card. If you do not want to receive your gift card, please email [INSERT INDIVIDUAL AND EMAIL].

If you have any questions, please contact [INSERT INDIVIDUAL AND EMAIL].

Thank you for your interest in this research study. We look forward to meeting you soon!

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