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Community-Based Social Marketing

SSDN Education to Execution Workshop Series



Webinar #2: Conducting Barrier and Benefit Research

October 5, 2015

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Research • Social Marketing • Results

Agenda

Introductions (5 min)

- Announcements

Background (5 min)

- Process Overview

Behavior Selection Review (15 min)

- Lessons Learned

Barrier and Benefit Research (35 min)

- Research Methods
- Survey Design

Q&A (30 min)

- Feasibility
- Challenges/Concerns

Introductions

SSDN: Housekeeping & Announcements

Action Research: Questions from Webinar #1

Background

Webinar Series Overview

Process Overview

Webinar Series Overview

❑ **Selecting and Prioritizing Behaviors**

- ❑ *Training and Tools*

❑ **Conducting Barrier and Benefit Research**

- ❑ *Methods, Best Practices, Instruments, Resources*

❑ **Strategy and Message Design**

- ❑ *Social Science, Matching Tools, Branding/Messaging*

❑ **Pilot Testing and Evaluation**

- ❑ *Identifying Metrics, Design, Analysis, ROI*

❑ **Troubleshooting, Lessons Learned, Scaling Up**

- ❑ *Discussion*

Community-Based Social Marketing

Select Behavior



```
graph TD; A[Select Behavior] --> B[Barriers & Benefits]; B --> C[Develop Strategy]; C --> D[Pilot Test]; D --> E[Implement Broadly & Evaluate];
```

The diagram illustrates a five-step process for Community-Based Social Marketing. The steps are represented by colored rectangular boxes arranged in a descending staircase pattern from top-left to bottom-right. Each step is connected to the next by a downward-pointing arrow. The colors of the boxes are: green, brown, gold, grey, and black.

Barriers & Benefits

Develop Strategy

Pilot Test

Implement Broadly & Evaluate

McKenzie-Mohr, D. (1999, 2011). Fostering sustainable behavior. Canada: New Society Publishers. See also www.cbsm.com

Background

- ❑ Fostering Sustainable Behavior

- ❑ *Doug McKenzie-Mohr*

- ❑ Case Studies

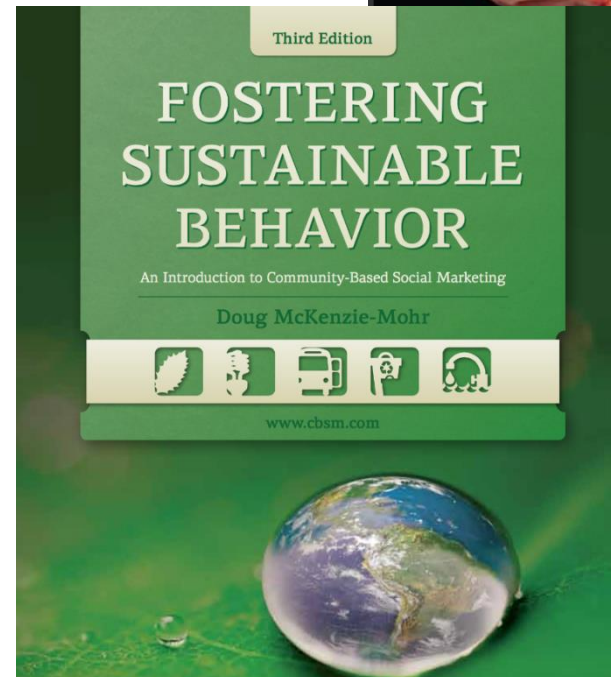
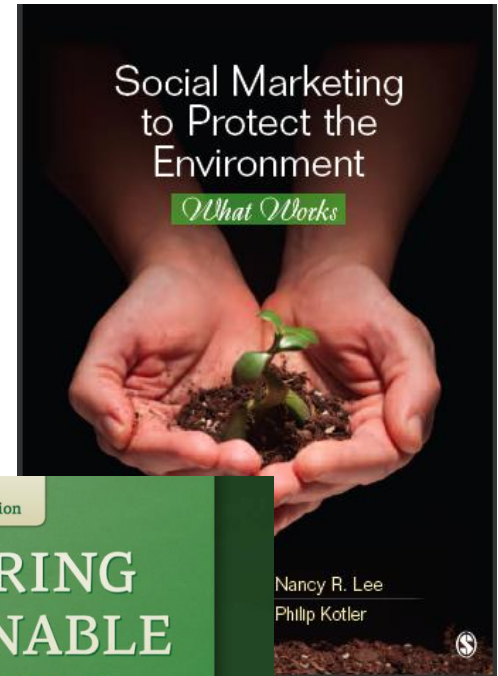
- ❑ *www.cbsm.com*

- ❑ *“What Works”*

- ❑ USDN Turnkey Strategies

- ❑ *Cold Water Wash*

- ❑ *Computer Shutdown*



Behavior Selection

Process
Application

Summary of Behavior Selection Steps

#1: Define your Outcome



#2: Decide what Sector to Target



#3: Decide which Usage Categories to Target



#4: Create a List of Behaviors



#5: Gather IPPA Information



#6: Calculate Weights

Behavior Worksheets: Plastic Bags (N=2)

❑ Outcomes

- ❑ Plastic Bag Use
- ❑ Remove Plastic Bags from Residential Recycling Bins

❑ Metrics

- ❑ Amount of plastic bags in store receptacles
- ❑ Amount of plastic bags distributed at store check-out lanes
- ❑ Truck runs

❑ Audience(s)

- ❑ Residents

Behavior Worksheets: Plastic Bags (N=2)

❑ Behaviors

- ❑ ↓ individual behavior of placing bags into recycle bin
 - ❑ Could be further refined – where should they put them?
- ❑ **Ask for paper bags instead of plastic**
 - ❑ End state, non-divisible behavior
- ❑ **Retrain grocery store clerks to say “Paper or Plastic”**
 - ❑ This is a strategy – may address convenience barrier
- ❑ **Use personal/reusable bags during shopping**
 - ❑ End state, non-divisible behavior
- ❑ **Reuse plastic bags in the home**
 - ❑ End state?
- ❑ **Bring used plastic bags to a store with a receptacle**
 - ❑ End state, non-divisible behavior

Behavior Worksheets: Recycling (N=2)

❑ Outcomes

- ❑ Recycling

❑ Metrics

- ❑ Surveys of staff (pre-post)
- ❑ Visual observation of recycling bins in central areas
- ❑ Sample materials in garbage and recycling in city hall

❑ Audience(s)

- ❑ GRM employees
- ❑ City Hall staff

Behavior Worksheets: Plastic Bags (N=2)

❑ Behaviors

- ❑ **Properly place recyclables in recycle container**
 - ❑ Could be further refined – what materials?
- ❑ **Recycle more items**
 - ❑ Could be further refined – what items not already recycled?
- ❑ **Recycle correct items**
 - ❑ Could be further refined – what items incorrectly recycled?
- ❑ **Understand what should go in different bins**
 - ❑ Not end state
- ❑ **Know how to find the information on what can be recycled**
 - ❑ Not end state
- ❑ **Use desk side bins and/or centrally located bins**
 - ❑ This is a strategy – may address convenience barrier
- ❑ **Watch new county staff recycling program Prezi**
 - ❑ This is a strategy – may address knowledge barriers

Barrier and Benefit Research

Research Methods
Survey Design

Step 2: Identify Barriers and Benefits

- ❑ Why aren't people engaging in the desired behavior?
 - ❑ Internal: motivation, knowledge, convenience, attitudes, time
 - ❑ Structural: program changes, convenience, difficulty, access
- ❑ Multiple barriers can exist simultaneously
 - ❑ Prioritize
 - ❑ Multivariate statistics
- ❑ Barriers can vary by:
 - ❑ Behavior
 - ❑ Audience
 - ❑ Season

Step 2: Identify Barriers and Benefits

- ❑ NOT based on a hunch!

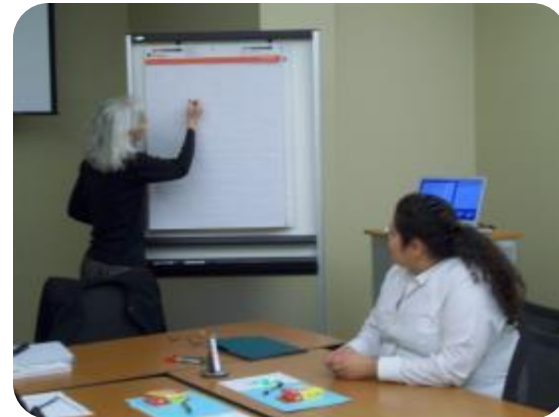
- ❑ Find target population

- ❑ Starting point

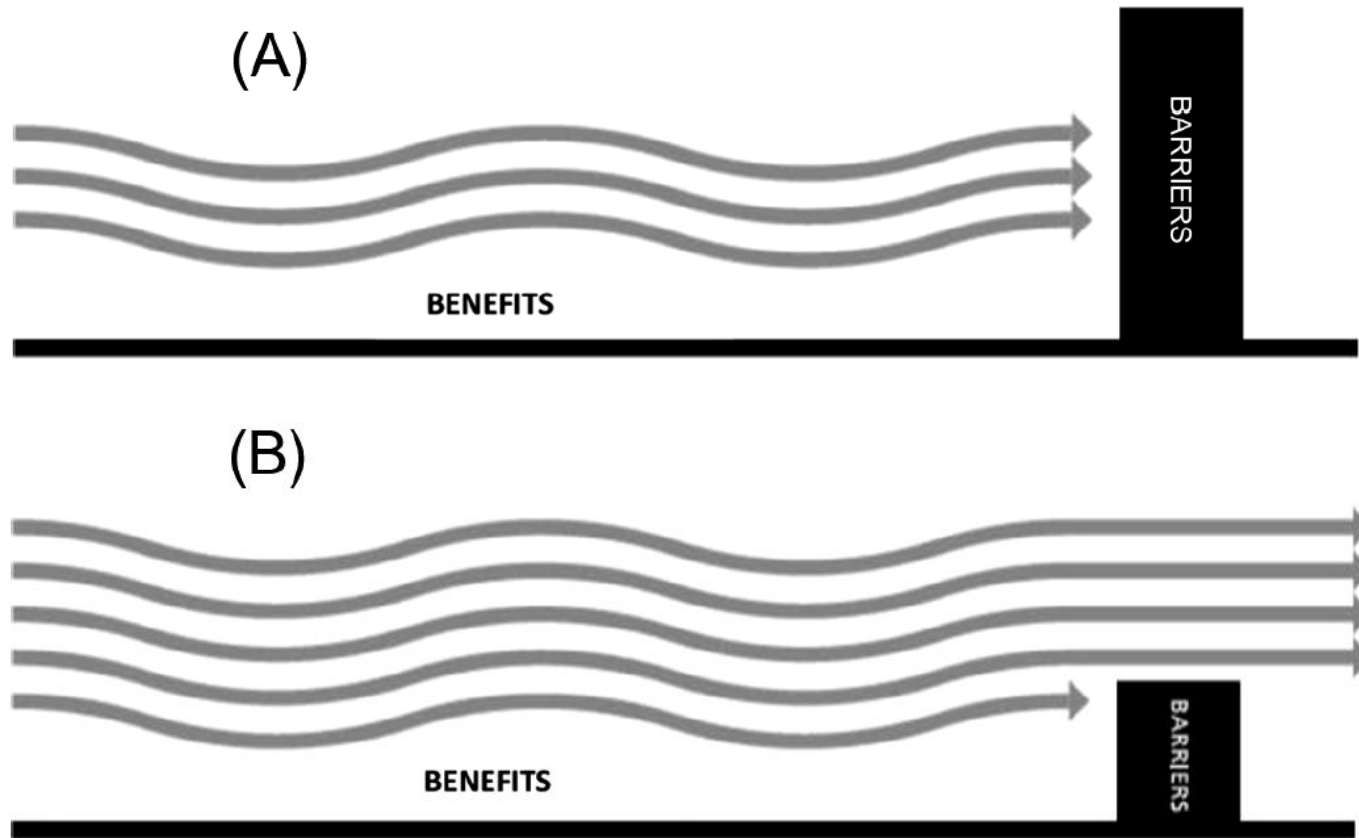
- ❑ Literature Reviews
 - ❑ Observations
 - ❑ Focus Groups

- ❑ Surveys

- ❑ In-person
 - ❑ Telephone
 - ❑ Mail
 - ❑ Web-based



Remove Barriers & Enhance Benefits



Graphic From: Schultz, P. W. (2013). Strategies for promoting proenvironmental behavior: Lots of tools but few instructions. *European Psychologist*.

Literature Review

❑ Features

- ❑ Technical reports
- ❑ Academic reports
- ❑ Program descriptions

❑ Useful Functions

- ❑ Range of barriers
- ❑ Already done

❑ Limitations

- ❑ Generalizability
- ❑ File drawer problem



Focus Groups

❑ Features

- ❑ 5-8 participants
- ❑ Group discussion

❑ Useful Functions

- ❑ In-depth exploration
- ❑ Message reactions
- ❑ Survey foundations

❑ Limitations

- ❑ Group dynamics
- ❑ Not representative



In-Depth Interview

❑ Features

- ❑ 1 participant
- ❑ In-person or by phone

❑ Useful Functions

- ❑ Select sample
- ❑ Complex topics
- ❑ Sensitive topics

❑ Limitations

- ❑ Time consuming
- ❑ Interviewer training



Mail Survey

❑ Features

- ❑ Standardized instrument
- ❑ Broad spectrum of items

❑ Useful Functions

- ❑ Targeted community issues
- ❑ Public opinion
- ❑ Visual material

❑ Limitations

- ❑ No follow up questions
- ❑ No control over who responds
- ❑ Low response rates



Telephone Survey

❑ Features

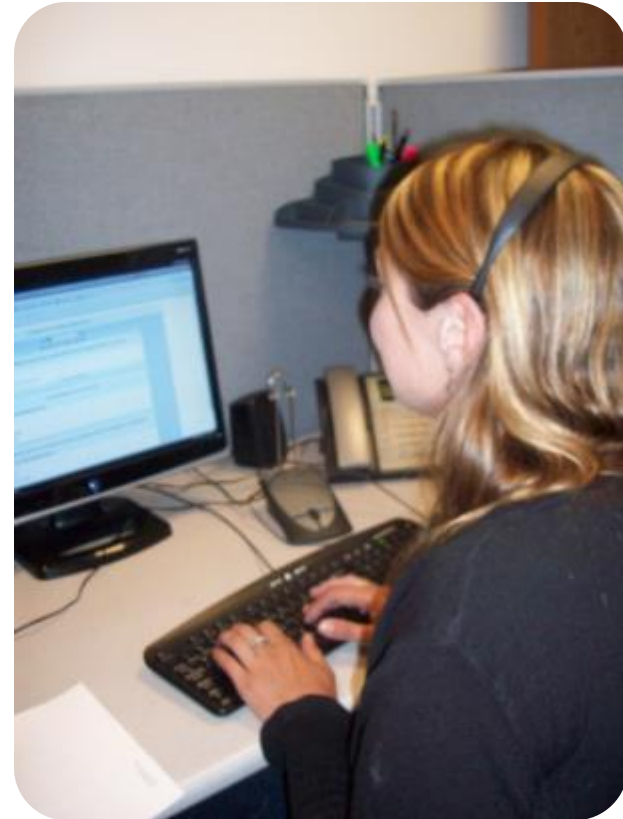
- ❑ Listed sample
- ❑ Random Digit Dial

❑ Useful Functions

- ❑ Polling/Awareness
- ❑ Complex surveys
- ❑ Multiple Languages
- ❑ Fast

❑ Limitations

- ❑ Cost
- ❑ Cell Phones/Landlines



Web Survey

❑ Features

- ❑ Thousands of responses quickly
- ❑ Panel or Email List

❑ Useful Functions

- ❑ Audio/Visual
- ❑ Sensitive topics
- ❑ Known audience
- ❑ Tech savvy audience

❑ Limitations

- ❑ Generalizability
- ❑ Low response rates



Intercept Interview

❑ Features

- ❑ On location
- ❑ Usually brief

❑ Useful Functions

- ❑ Focused sample
- ❑ Message testing
- ❑ Small budget
- ❑ Short on time

❑ Limitations

- ❑ Generalizability
- ❑ Interviewer bias



Behavioral Observations

❑ Features

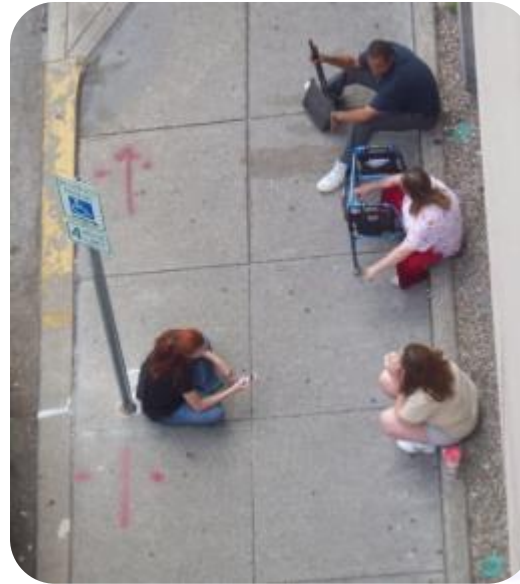
- ❑ Unobtrusive
- ❑ Naturally occurring
- ❑ Context data

❑ Useful Functions

- ❑ Actual behavior
- ❑ Infrastructure changes
- ❑ Avoid social desirability

❑ Limitations

- ❑ Time
- ❑ Private Behaviors



Selecting Research Modes

- ❑ Appropriate for Research Questions
 - ❑ What do you **need** to know?
 - ❑ Will the method tell you what you need to know?
- ❑ Appropriate for Audience
 - ❑ Education
 - ❑ Technical expertise
 - ❑ Access/Privacy/Time
- ❑ Constraints
 - ❑ Budget
 - ❑ Time
 - ❑ Training



When you are in a Crunch

- ❑ Conduct a literature review
 - ❑ Barriers and benefits experienced by others
- ❑ Conduct quick (2-question) intercept
 - ❑ Variety of locations
 - ❑ Where does your audience spend time?
 - ❑ Participants and non-participants
 - ❑ Two principal questions
 - ❑ What makes it difficult or challenging for you to do X?
 - ❑ What do you see as beneficial or rewarding about doing X?

Research Tools

Writing Questions
Additional Resources

Getting Started

- ❑ Clarify your Objective
 - ❑ Mission statement
 - ❑ May have primary and secondary objectives

- ❑ List Items to be Measured
 - ❑ List of items that “might” be included
 - ❑ Look outside
 - ❑ Focus on themes, not wording
 - ❑ Organize into groupings
 - ❑ Check against objective statement



Writing the Survey: Question Formats

❑ Open vs. Closed Ended

- ❑ Open-ended difficult to analyze and take more time

❑ Scales

- ❑ 6, 7, or 11-point instead of 3 or 4
- ❑ Do you want a midpoint?
- ❑ Spell out end points
 - ❑ 0=Never; 10=Always → equal distance
 - ❑ Labels are limiting
- ❑ Limit to a few types of scales



Not at All Important						Extremely Important					
0	1	2	3	4	5	6	7	8	9	10	
0	1	2	3	4	5	6	7	8	9	10	
0	1	2	3	4	5	6	7	8	9	10	
0	1	2	3	4	5	6	7	8	9	10	
0	1	2	3	4	5	6	7	8	9	10	

❑ Categorical

- ❑ When distance between ratings doesn't matter
- ❑ Gender, Home ownership, Education, etc.

Writing the Survey: Content

❑ Current Behavior

- ❑ Specific
- ❑ Time constrained (e.g., in the last year, have you...)

❑ Behavioral Intentions

- ❑ Future behavior
- ❑ In the next XX months, do you plan to....

Writing the Survey: Content

❑ Perceived Barriers

- ❑ **Scale:** How much is ___ a barrier that prevents you from ___?
- ❑ **Scale:** How much does ____ make it difficult for you to ____?
- ❑ **Open:** What makes it difficult for you to _____?

❑ Perceived Benefits

- ❑ **Scale:** How much is ___ a factor in your decision to ___?
- ❑ **Scale:** How important is ___ as a reason to ___?
- ❑ **Open:** What do you see as a benefit of doing _____?

Writing the Survey: Content

❑ Relevant Demographics

- ❑ Job title
- ❑ Education
- ❑ Home ownership
- ❑ Job tenure
- ❑ Training
- ❑ Age
- ❑ Etc....

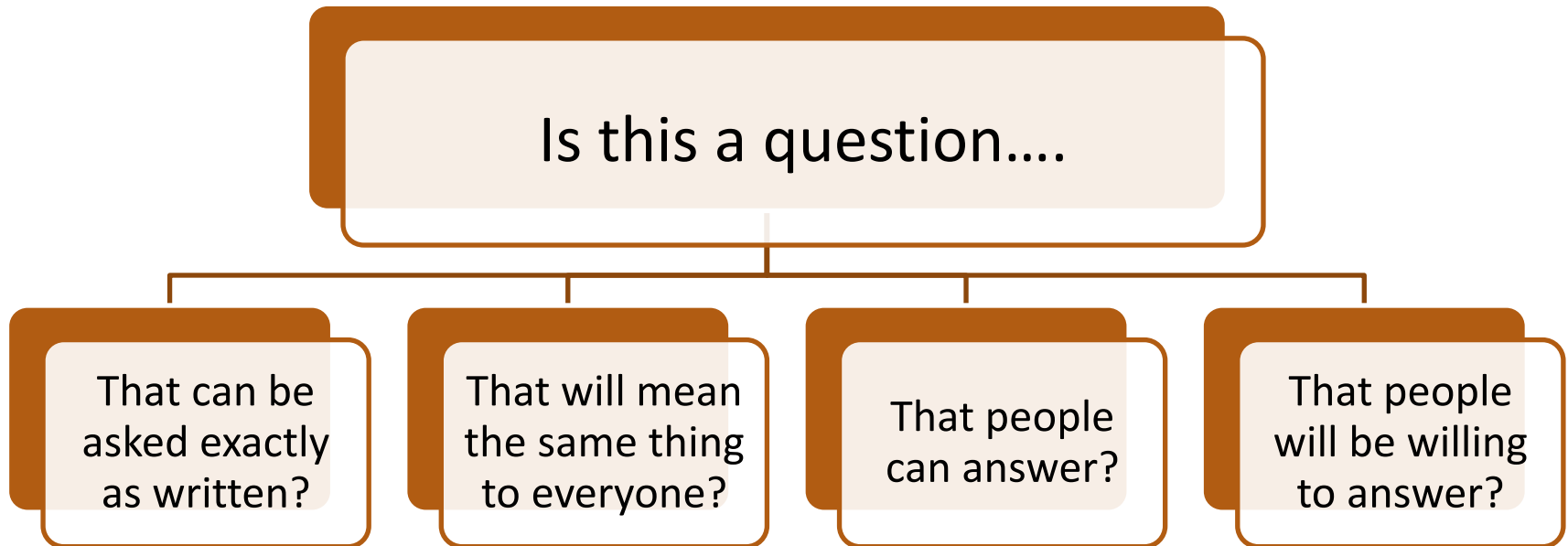
❑ Limit to Relevant Data

- ❑ Usually placed at end of survey

Writing the Survey: Wording

- ❑ Avoid abbreviations
 - ❑ Unless common (e.g., USA, Local University, etc.)
- ❑ Avoid slang and colloquialisms
 - ❑ Change over time
 - ❑ For example, “Internet search” instead of “Google it”
- ❑ Avoid jargon and technical expressions
 - ❑ Exception for special audiences
 - ❑ Consider audience understanding of topic

Writing the Survey: Wording



Pilot Test the Survey

❑ Expert Review

- ❑ Technical review
- ❑ Fit to mission
- ❑ Wording
- ❑ Data relevance

❑ Audience Review

- ❑ Cognitive interview
- ❑ Timing (10-12 minutes)



Conduct the Survey

❑ Timing

- ❑ Schedule around busy times
- ❑ 10-12 minutes
- ❑ Collect all data quickly to avoid real-world interference
 - ❑ Natural disasters, economic changes, political changes, etc.

❑ Enhance Participation

- ❑ Pre-notification letters
- ❑ Gatekeepers
- ❑ Training
- ❑ Confidence → Expect a Yes



Conduct the Survey

❑ Establish Credibility

- ❑ Who are you?
- ❑ How and why was the individual selected?
- ❑ What will be asked?
- ❑ How long will it take?
- ❑ Why is the input important?
- ❑ How will data be used?
- ❑ Anonymity vs. Confidentiality

Survey Resources

- **Dillman, D.A.**, Smyth, J.D., and Christian, L.M. (2014) Internet, Phone, Mail, and Mixed-Mode Surveys: The Tailored Design Method. Hoboken, NJ: John Wiley and Sons.
- **The Survey Kit.** Sage Publications. Edited by Arlene Fink.
- **AAPOR.** American Association for Public Opinion Research.

Q & A

Feasibility
Challenges/Concerns

Post-Webinar Survey

<http://survey.takeactionresearch.com/cgi-bin/rws5.pl?FORM=SSDNpostwebinar>

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