

Getting Connected...

- **Dial In (best connection):**
 - Dial: 866.775.0802; Participant Code: *3630#
 - Make sure your speakers are **off** or there will be an echo.
 - To merge your name with your phone number on the list:
 - Enter token number found in “Join Audio Conference” pop up box. The token ID can also be viewed within the webinar by clicking on the “i” icon at the top right-hand corner.
 - Click the drop down menu at the top right of the attendees pod and select "edit my information" then enter your name and phone number
- **Computer**
 - Make sure your computer microphone and speakers are **on**.

Community-Based Social Marketing

SSDN Education to Execution Workshop Series



Webinar #2: Conducting Barrier and Benefit Research

October 5, 2015

If you are using the phone to dial-in, be sure that your computer mic/speakers are on mute. **This webinar will be recorded.**



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

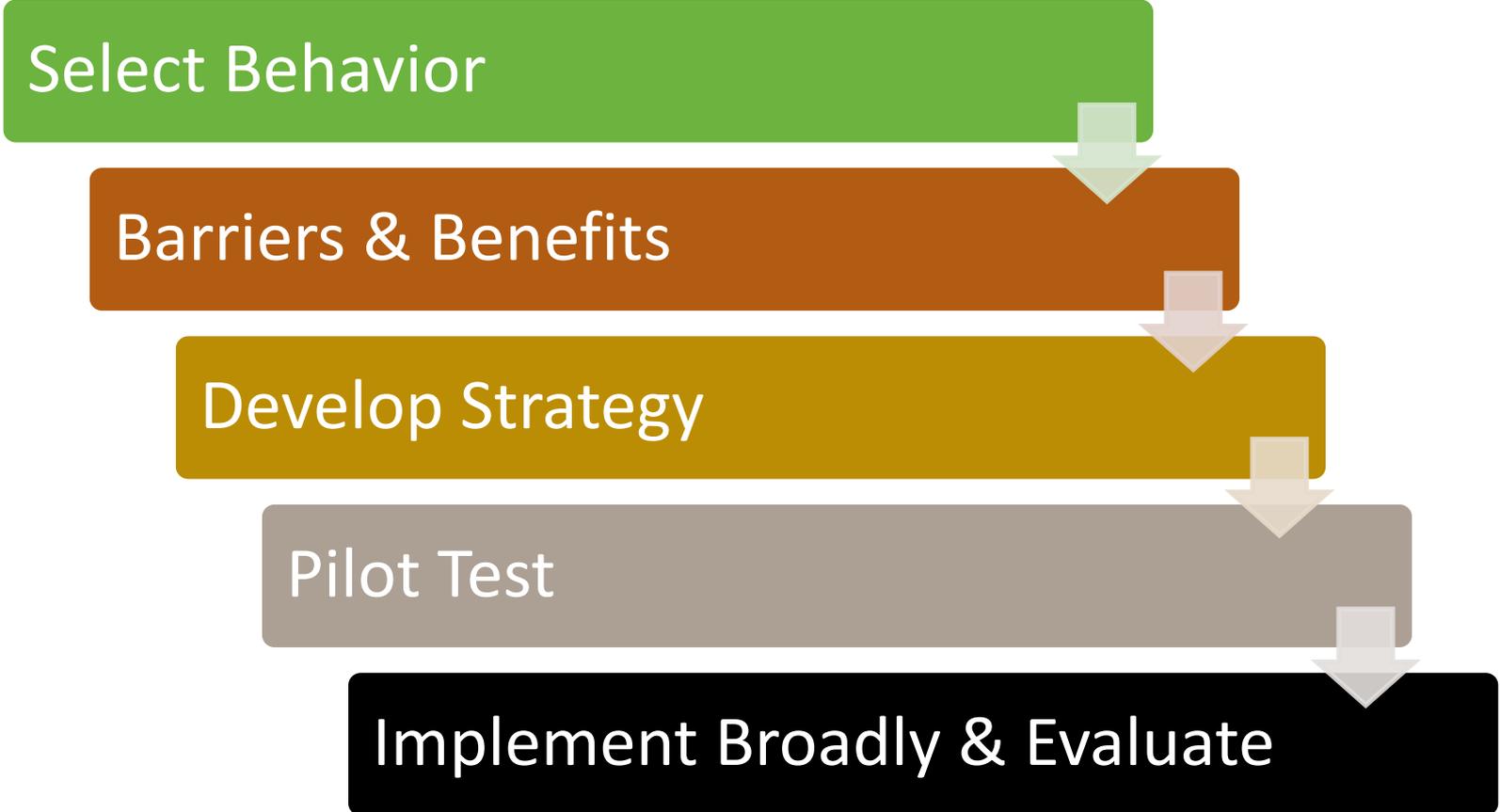
Process Overview

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. Each step is contained within a colored rectangular box, and the boxes are arranged in a descending staircase pattern from top-left to bottom-right. Downward-pointing arrows connect the bottom-right corner of one box to the top-left corner of the next box below it. The colors of the boxes are: green, brown, gold, grey, and black.

Barriers & Benefits

Develop Strategy

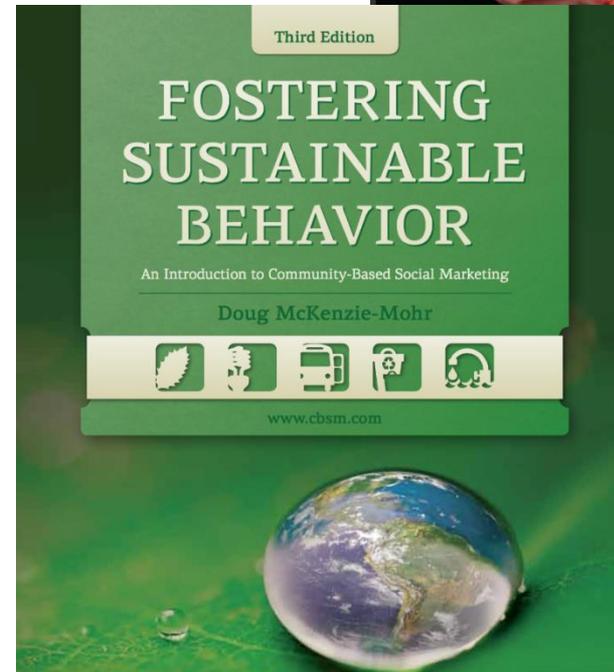
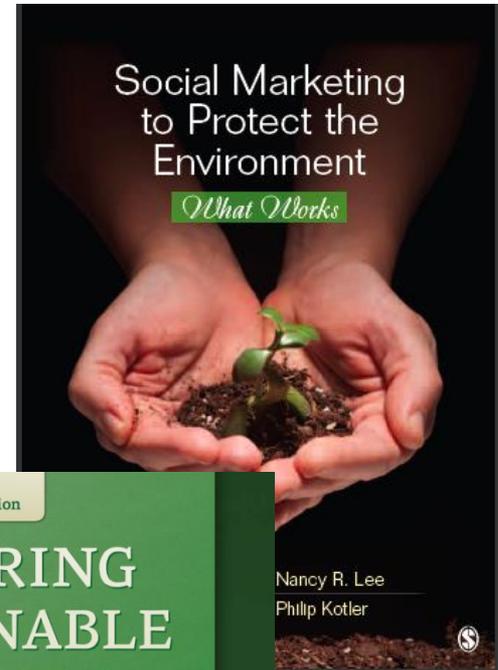
Pilot Test

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

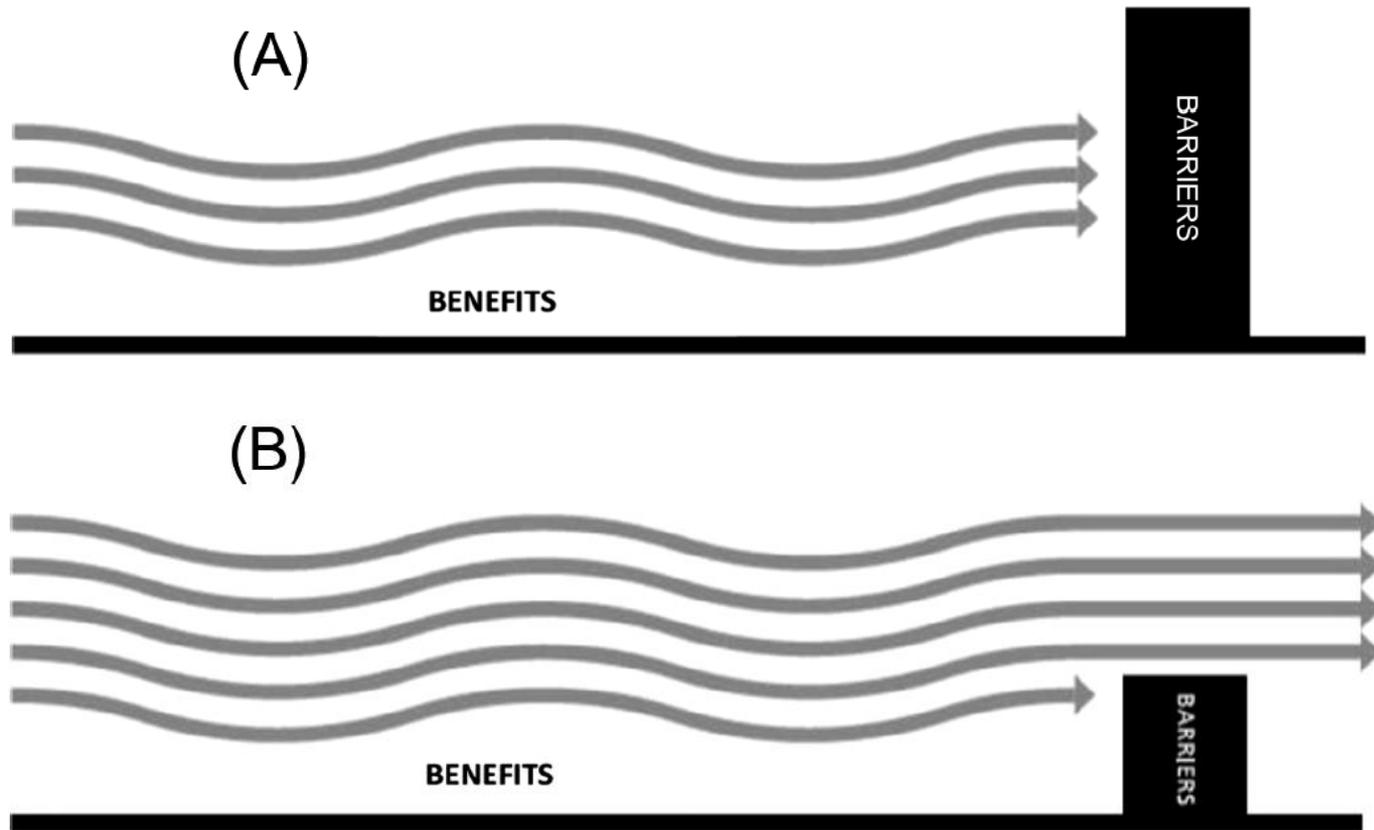
- ❑ NOT based on a hunch!
 - ❑ Find target population

- ❑ 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

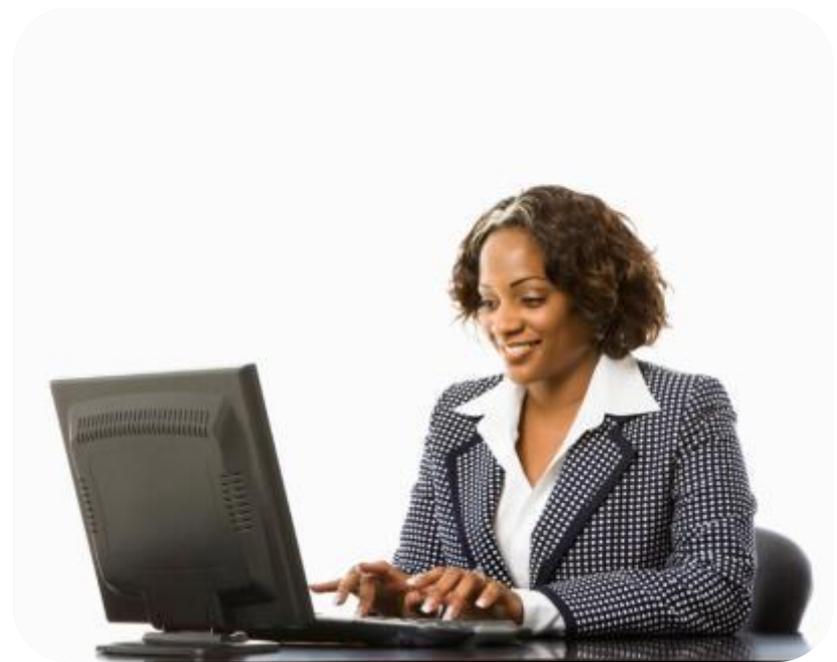
- ❑ Technical reports
- ❑ Academic reports
- ❑ Program descriptions

❑ 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

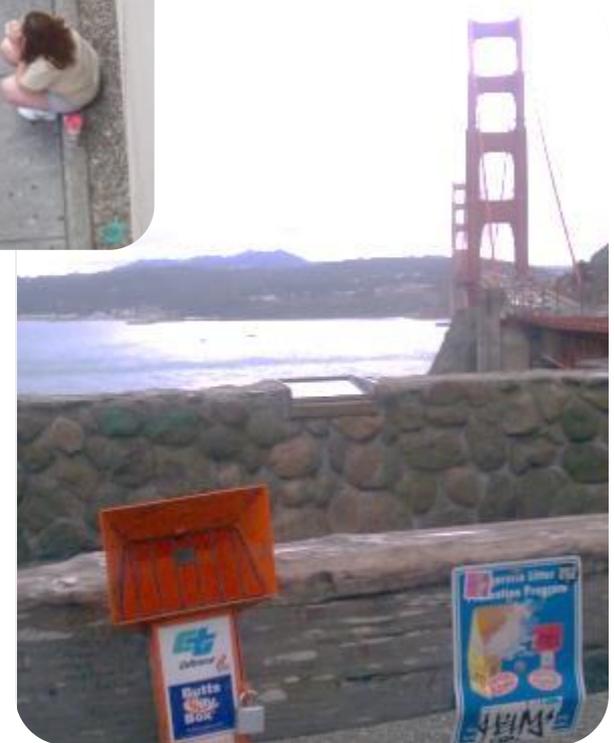
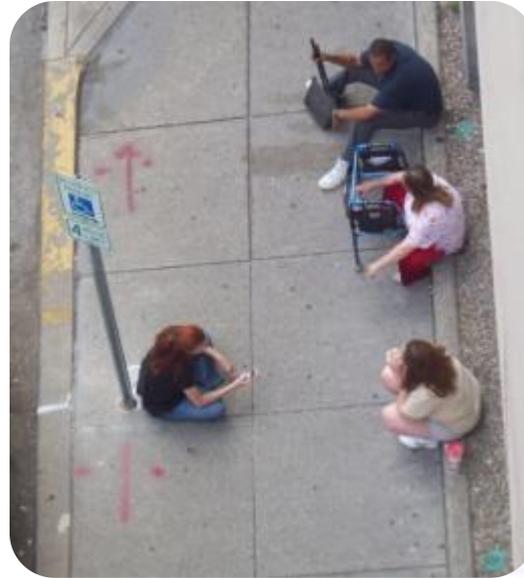
- ❑ Unobtrusive
- ❑ Naturally occurring
- ❑ Context data

❑ 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

❑ 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 _____?

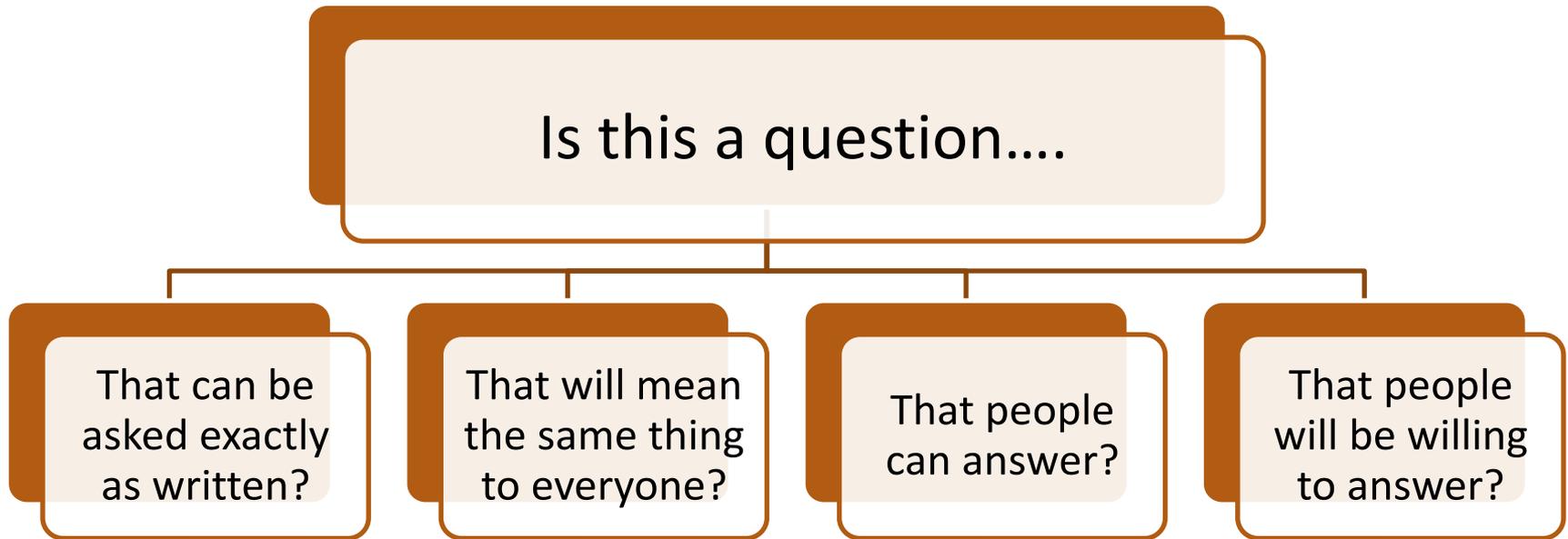
Writing the Survey: Content

- ❑ 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>

Action Research

California: 3630 Ocean Ranch Blvd. | Oceanside, CA 92056

New York: 13 East 37th St., Suite 7F | New York, NY 10016

phone: 760.722.4000 | **email:** info@action3630.com

www.action3630.com

