

Four Steps to Better Research

How-to Guide for More
Useful Behavioral Insights



You want to change what people do. So here's a first step:

Figure out why they're not doing your target behavior now. Most likely, it's because doing something else (a competing behavior) is easier, more fun and/or more popular. To understand why, you need to observe, experiment, analyze and ask questions – or, in other words, conduct formative research.

Marketing research is a profession, so just as no short document can make you a doctor, this guide won't transform you into a veteran researcher. This is more like first aid: It'll help you do better and be in better shape if you do bring in professionals. In short, it's better than nothing.

The steps below assume you already know what behavior you are going to target and what population you want to influence.

You should have already considered questions like:

- What change in behavior will help me accomplish my goal?
- Which group(s) of people could have the most impact if you changed their behavior?
- Which group(s) of people is/are the easiest to reach or influence?

Those decisions do not need to be final. In fact, you should continuously re-evaluate your initial answers to those questions and consider further narrowing your target population. The best practice is to ask those questions throughout this process.

Step 1: Determine What You Need to Know

Start your research planning by simply being descriptive.

Try to answer questions such as:

- What portion of people is doing your target behavior now?
- How are they doing it?
- When are they doing it? When are they not doing it?
- What are some people doing instead (competing behavior)?
How often do they do that?

You want to start by writing down **everything** you need to know. These are your “research questions.” It's not what you'll be asking people; it's just what you need to know.

The research questions above are a start. But you need more: **You also want to learn why people do what they do.**

Most of the descriptive stuff can be boiled down to “how many” and “who.” How many people are doing it? Who is doing it? This is called **quantitative** data. It requires a large representative sample of the target population so you can determine how common something is among different groups of people. It tells you “who” and “how many.”

Finding out why and how people do something is difficult to gather from a representative sample or from data gathered online or in rapid telephone interviews. You need time with research participants to explore what's behind their decisions. You won't be able to do that with a huge sample, so you spend longer periods of time with a smaller sample. This is called **qualitative** data. It informs how and why people do things.

One way to explore the “why” behind a target behavior is to consider what factors may or may not be making the behavior fun, easy and popular. Typically, these factors are related to one or more of 12 common behavioral determinants: rewards, risks, penalties, emotions, skills (including knowledge), efficacy, environment, control, investment, norms, self-standards and loss aversion. You will want to consider which of these are in play.

This can give you more research questions to explore, including:

- What are the **good things that happen (rewards)** when someone does the target behavior, and which of those do most people already know?
- What are the **bad things that always or sometimes happen (penalties and risks)** when someone does the behavior, and which of those do most people already know?
- How does doing or not doing the behavior **feel (emotions)**?
- Which, if any, **skills** are needed to do the behavior, and do most people have these skills?
- Do people have the **confidence (efficacy)** they need to do the behavior?
- What **environmental barriers, incentives and triggers** exist around the behavior?
- How much **control** do people typically have over the behavior, and how could they have more?
- What's the **price or investment** (in time, money, etc.) needed to do the behavior?
- What do **most people do (norms)** and how much does that encourage or discourage others?
- How do people **want to see themselves (self-standards)** and how does that relate to this behavior?
- Does doing this behavior make people feel like they are **giving something up (loss aversion)**?

Step 2: Decide What Research You Need to Do

Maybe you're lucky. Maybe somebody already has all this information. You only need to look it up. A lot can be learned from a savvy Internet search. But more likely, it will be a mix: Some of this you can gather now through other people's work (secondary research), but some of it you'll need to gather yourself (primary research). So, start by learning what's out there.

Look at your research questions from Step 1. For each “how-many” or “who” question, you'll need to use **quantitative** research methods, such as those listed below, or **quantitative** data gathered by others. For each “why” or “how” question, you'll need to use a **qualitative** method. For now, just note what method you might use to get at each of your research questions.

There are many ways to get answers to these questions, some more reliable than others.

Below is a look at some options.

<p>Most reliable:</p>	<ul style="list-style-type: none"> - Actual use or behavioral data, where every instance is tracked (eg, admissions figures, some website analytics, databases of medical records, etc.) - Representative use or behavioral data, where the actual behavior of a representative sample is tracked - Bio, environmental or other indicators of behavior (when the behavior leaves evidence behind that can be tracked)
<p>Helpful, but not entirely reliable:</p>	<ul style="list-style-type: none"> - Running experiments online or with large populations, such as placing dummy search engine ads. (Lots of room for error around how you design the experiment and who can participate) - Observation: Watching what a representative sample of people do in a representative setting over a representative period of time. (Note all the times we used “representative: in that sentence: all are opportunities for error). This approach of observation and getting people to collect artifacts is part of what’s known as ethnographies. - A survey where people self-reported behaviors and attitudes. (Lots of room for error: People can lie, be mistaken, be misled by the question, exaggerate, etc., and you can fail to reach a truly representative sample) - Discussions and interviews. Talking or experimenting with a smaller group of people to explore how people think or test how they react. These include one-on-one in-depth interviews (IDIs), focus groups and using an online message board. - Working with a sample of the population to create a solution together. This is called co-creation.
<p>Better than guessing:</p>	<ul style="list-style-type: none"> - Asking a bunch of people who know a lot about the behavior or population involved, usually because they either study or work with the population. These are sometimes called “Key Informant Interviews.” (Sounds more impressive than asking smart people what they know, but it’s basically the same thing). - Learning about similar behaviors in similar places with similar people. Yes, we’re talking about searching the internet for others’ research into similar situations.
<p>Not a good idea:</p>	<ul style="list-style-type: none"> - Asking only friends and relatives what they think (unless of course, they are precisely the target of your intervention). - Relying solely on your own experiences and prejudices, or what your management or client believes.

First, look through your research questions and decide what you can answer from the data you already have or from your secondary research. Then, see if the remaining questions are truly important: Would the answers dramatically change how you approach the problem? If you still have big unanswered questions, you would benefit from primary research.

Below are some common qualitative and quantitative research methodologies you might use to answer your unanswered research questions.

Quantitative research questions:

How many? Who is doing / seeing / thinking what?

Common methods:

- Analyzing web data
- Analyzing use data
- Surveying a representative sample of the target population
- Running online experiments
- Observation

Qualitative research questions:

How? Why?

Common methods:

- One-on-one interviews (e.g., scheduled in-depth interviews or brief intercept interviews)
- In-person group discussions (focus groups, triads)
- Online bulletin boards
- Online communities
- Ethnography / observation
- Co-creation
- Key informant interviews

All of these efforts are probably best handled by professionals, not so much because pulling off the logistics is hard (anyone can pull together a focus group), but because asking the right questions and properly analyzing the answers is very difficult. At this point, if you have the funding, it makes the most sense to share your priority research questions (those you still have not answered or eliminated because they're not important) with a behavior change marketing or research firm and put together a plan to get the answers you need.

You should know the kind of research (qualitative, quantitative or both) you need from the chart above. You also should know something about the population you want to participate: This should be the people you need to change or, perhaps, people who know or influence them. As a general rule, the narrower the population you study, the more specific and powerful the insights you'll get. Try to avoid studying "the general public." We're all pretty different.

Also, whether you do your own research or contract professionals, you can't just ask the target population your research questions and expect valuable data. One example: If you ask smokers what would get them to stop smoking, most will say you need to make the health dangers clear. Yet, most smokers are already aware of the dangers. (Many think they are worse than they actually are). What's more, most smokers already want to quit. If smokers knew what could get them to quit, they'd have already done it. The simple fact is: People don't know what will get them to change. So don't ask them. You need to figure it out by exploring what's driving their current behavior. Which determinants are at work? How are they working? Then, you can explore what else the target population is seeking and how you can meet their needs with something new.

To do that, you'll need to think about more than what research method you use. You need to know what kind of questions to ask.

Step 3: Ask the Right Questions

People will not tell you why they do something or what might change them. Chances are they don't know. But they can tell you what they do know – their perceptions – and that can tell you a lot, especially when you compare what different types of people perceive and how all of that compares to reality.

Below is a look at some research questions you may need answered and some questions you can ask the target population to inform your answers. Note that the format and wording for the questions would vary greatly depending on the population and the behavior. This is a starting point – a frame for the kind of questions that need to be asked. Some can be fashioned into quantitative questions. Those listed here are in qualitative format. The six questions in bold are core questions we always ask in our formative research.

What are the good things that happen (rewards) when someone does the behavior, and which of those do most people already know?

→ Possible questions to ask the target population:

- What are the good things that happen when you _____? (Push to get a long list)
- Propose possible rewards not mentioned by the participant and see the reaction: Is this something that might happen to you? Why or why not? How likely is this? How valuable would this be to you?

What are the bad things that always or sometimes happen (penalties and risks) when someone does the behavior, and which of those do most people already know?

→ Possible questions to ask the target population:

- What are the bad things that happen when you _____? (Push to get a long list)
- What can make doing _____ risky?
- Which is safer: _____ or _____? Why?

If you want to discourage a behavior, ask about risks or penalties the participant did not mention and see the reaction.

How does doing or not doing the behavior feel (emotions)? Does doing this behavior make people feel like they are giving something up? (Loss aversion)

→ Possible questions to ask the target population:

- How does it feel when you _____? (Probe for emotions and loss aversion)
- How does it feel when you don't _____? How does it feel when you _____ instead of _____? (Probe for emotions and loss aversion)
- What do you like about doing _____?
- Use metaphor elicitation: Have participants relate the behavior to pictures, analyze what metaphors are being conveyed, then explore explanations with the participants. (Warning: This is complicated to do properly).

Which, if any, skills are needed to do the behavior, and do most people have these skills? Do people have the confidence (efficacy) they need to do the behavior? What environmental barriers, incentives and triggers exist around the behavior? How much control do people typically have over the behavior, and how could they have more? What's the price or investment (in time, money, etc.) needed to do the behavior?

→ Possible questions to ask the target population:

- Compared to most people, how well do you _____?
- What would make doing _____ difficult? (Probe for issues around skills, efficacy, control, cost and environment)
- What would make doing _____ easier? (Probe for issues around skills, efficacy, control, cost and environment)
- What are some of the reasons you _____?
- Why do you _____ when you do?

What do most people do (norms) and how much does that encourage or discourage others?

→ Possible questions to ask the target population:

- What portion of people [your age / around here / etc - something to get at peers] do _____?
- Who wants you to _____ more often?
- Who would rather you spend less time doing _____? (Or alternatively: Who would rather you do something else? Or: Who needs you to spend that time doing something else?)

How do people want to see themselves (self-standards) and how does that relate to this behavior?

→ Possible questions to ask the target population:

- Describe the kind of person who always/ never does _____.
- How is this person different than you?

You also want to explore what people are seeking. This is more open ended. The participants may not connect one of their goals with the behavior, so you can't only ask about what they want from the behavior. You might need to make that connection for them later as part of an intervention. To get at what they are seeking – their “need-states” – start with what open-ended research has been done on the population (there is lots of work that's been done to examine what certain populations are seeking). You can also ask about their goals in whatever role is most closely aligned with the behavior (as a parent, for example).

Finally, always make sure you ask the questions necessary to classify every research participant as either a doer (someone who is doing the target behavior) or a non-doer (someone who isn't). That means you always have to determine if they are doing the target behavior. Always! Sometimes, you may have a three-level situation. For example, doers can sometimes be split into habitual and occasional. In any case, this is critical information needed for any analysis.

Step 4: Analyze Your Findings

The most important analysis you can do in a need states change campaign is comparing Doers to Non-Doers. It is the differences between those who do the behavior and those who don't that will often hold the key to what makes some people act and others not.

Just compare how Doers answer each of the questions described above to the Non-Doers. When you find a significant difference, see if the data you gathered can explain why. Maybe that's one thing that makes Doers doers and Non-doers non-doers.

That's just analysis to consider. You are also looking for other telltale signals that a specific determinant is important so you can decide what type of intervention might be helpful.

Below is a chart showing some example findings and how that finding might impact what you do.

Finding	Implication
Research participants dramatically overestimate or underestimate the proportion of their peers who do the behavior.	You might influence their behavior simply by revealing the actual norm (what most people like them do), either by publicizing the data or making the behavior more visible.
Low awareness of a reward, risk or penalty.	You can change that simply by publicizing that reward, risk or penalty, providing it is considered significant enough to justify behavior change.
Bad feelings or a lack of control associated with the behavior.	You could re-engineer the behavior (i.e., change how they do it or what they do) or its environment to stir more positive emotions or offer more control.
People don't know how to do the behavior or believe it is difficult.	You could provide training or work on other interventions that make the behavior easier to do. You could also allow people to “sample” the behavior to build efficacy.

People see the cost of the behavior (in time or money) as something that makes it difficult to do.	You could lower the cost, spread the cost over time or offer a discount for first use, to demonstrate the value of the behavior is worth the cost.
People think the behavior is mainly done by people very different from themselves.	You could use promotional tactics to frame the behavior as something people like the target population are doing.

These are simply examples. Obviously, there are endless possibilities once you starting exploring the forces behind behavior – that is, once you start considering what is determining the behavior so you can influence it. The key parts of this process to remember are:

- Name your target actors and target action
- Use data to describe as precisely as possible what's happening now
- Explore the perceptions of your target population in a way that helps you understand what common behavioral determinants may be at work. Remember: It's unlikely they will be able to predict what will change them.
- Compare those who do the behavior (Doers) with those who don't (Non-Doers) to see why some people act and others don't. That may offer a clue for how you can get more people to act.

And don't make this the last thing you read about research. This is simply a guide – a way to apply the Fun Easy Popular behavior change framework to gathering insights about your target audience.



For more resources, go to MarketingForChange.com/insights-center/resources



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