UNDERSTANDING THE SOCIAL MARKETING MODEL:
Focus Groups & Interviews

SUMA Social Marketing
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WHO WE ARE

An Austin-based social marketing consultancy since 1995

Susan Poag
CEO

Melanie Susswein
VP Account Services & Business Development
WHAT IS SOCIAL MARKETING?

1) It’s not social media!
WHAT WE DO

Work on behalf of clients who want/need to promote health behavior change in the interest of societal good and individual well-being.
Adolescent Health  Asthma  African American Breastfeeding  Cancer  Community Preparedness  Diabetes  Domestic Violence Prevention & Education  Emergency Rooms  Early Childhood Intervention  Fruits & Vegetables  Flu Prevention  Fit Kids  Gen X Hispanics  HIV Care  Immunizations  Juice Kissing Doesn’t Cause AIDS  Legal Aid  Litter Prevention  health literacy  Medicaid  Nurses Obesity  Osteoporosis  Perinatal HIV  Questions about all this  Respiratory Health Suicide Prevention  Tobacco Cessation  Training & Technical Assistance  Undocumented Workers Vaccinations  WIC  Website Usability for People with Disabilities  Youth Risk Behavior Survey Zobey
OUR CLIENTELE

• State and Federal Governmental Agencies
• Local Health Departments
• Hospital Districts
• Universities
• Professional Associations
• Advertising Agencies
• NPOs

[Image of Texas Department of State Health Services]
[Image of March of Dimes]
[Image of Harris Health System]
WHAT IS SOCIAL MARKETING?
SOCIAL MARKETING IS:

• A distinct, logical process
• A methodological discipline
• Informed by research from beginning to end
• Based on consumer preferences
• Meeting consumers where they are: physically, intellectually, emotionally, spiritually
Social Marketing Process

**Formative Research**
- Identify Best Practices
- Needs Assessment
- Segment and Prioritize Preconception Target Audiences
- Qualitative Research (Focus Groups, Observation, In-Depth or Small Group Interviews)

**Draft Campaign Materials**

**Pre-Campaign Surveys**
- Awareness, Beliefs, Attitudes, Knowledge, Behavior Expectations
- Field-Test Creative or Educational Materials
- Recommend Campaign Strategy

**Implement Campaign**

**Post-Test**
- Evaluate Awareness, Effectiveness and Behavior Change
SOCIAL MARKETING 4 P’S + 3

4 P’s of Marketing
• Product
• Place
• Price
• Promotion

+ 3
• Programs
• Policies
• Partnerships
## TYPES OF RESEARCH

<table>
<thead>
<tr>
<th>Qualitative</th>
<th>Quantitative</th>
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</thead>
<tbody>
<tr>
<td>Like</td>
<td>23,406</td>
</tr>
<tr>
<td>Awkward</td>
<td>2m32s</td>
</tr>
<tr>
<td>Easy</td>
<td>76.8%</td>
</tr>
<tr>
<td>Slow</td>
<td>4.3</td>
</tr>
<tr>
<td>Squirrel</td>
<td>$45,849</td>
</tr>
<tr>
<td>Efficient</td>
<td>1,127</td>
</tr>
<tr>
<td>Ambiguous</td>
<td>3.76%</td>
</tr>
<tr>
<td>How</td>
<td>€12.75</td>
</tr>
<tr>
<td>Confusing</td>
<td></td>
</tr>
</tbody>
</table>

**How?**

**How much?**
HOW CAN QUALITATIVE RESEARCH HELP?

• Program assessment & improvement
• Understanding perceptions, barriers, and beliefs
• Strategic planning
WHAT IS A FOCUS GROUP?

- Facilitated small group discussion
- About 2 hours long
- About 6 – 10 participants
- Online & bulletin boards
WHEN YOU WANT TO:

- Hear how people talk to one another about a topic
- Learn about levels of awareness and knowledge
- Learn about needs, barriers and challenges
- Best communication distribution channels
- Field test creative materials
IN-DEPTH INTERVIEWS

• Group dynamic not important
• Target audience dispersed / easier access
• Understand individual decision processes
• Sensitive or highly personal topics
• Usability testing
• Field testing
METHODOLOGY

**Goal:** Identify strategies to educate on and disseminate folic acid to women of child bearing age to reduce neural tube birth defects.

**Audiences:** Women ages 18-25, healthcare providers, stakeholders, others who can carry message forward.

**Methodology:** Focus groups/IDIs + quantitative survey

**Recruitment:** Professional, grassroots, stakeholder organizations, peers

**Findings:** Women who are not planning to have a baby are not motivated to take folic acid to reduce birth defects. They are motivated because it makes your nails grow, skin glow, and hair shine.
THE RESEARCH PROCESS

• Identify research issue & target audience
• Identify methodology
• Create screener & start participant recruiting
• Write discussion guide
• Coordinate facility logistics
• Facilitate groups/IDIs
• Analyze data & write report
• Strategic implementation
EXERCISE ONE: WHAT IS YOUR RESEARCH NEED?

- Research Question
  - Target Audience
  - Methodology
  - Sample Questions

Ask yourself:
- What do you want to know?
- What do you want to learn?
PLANNING: SWEAT THE DETAILS!

That went as planned, said no project ever.
PROJECT MANAGE WHOLE PROCESS

• Ideal timeline: 3+ months – strategy early & first!
  – Recruitment: 3-4 weeks
  – Guide writing: 2 weeks with edits
    • Additional 2 weeks for language translation
  – Conduct Focus groups/IDIs: 2+ weeks
  – Report writing: 2 weeks

• Document everything
  – Development of research plan & implementation
  – Obstacles & research constraints
RECRUITING PARTICIPANTS
PARTICIPANTS

• Your participants should be best qualified to answer your research questions
• How many focus groups? Interviews?
• Geographic representation
SCREENING PARTICIPANTS

- Audience segmentation
- Project-specific (parent, disease state, existing client, potential client, etc.)
- Education: literacy levels
- Roles, titles: power and hierarchy
- Language-dominance
RECRUITING PARTICIPANTS

• Professional recruiter
• Community-based
  • Nominated or referred
  • Social media, flyers in targeted spaces
  • Email listservs
  • Key partner/ stakeholder dissemination
HARD-TO-REACH AUDIENCES

Incentives are key

• Cash = typically $75 - $100
  – Gift cards, time off, raffle, coupons

• Peer-to-peer recruiting

• Incentivized peer-to-peer recruiting
  – Avoid relatives or close friends
MANAGE THE PROCESS

• Recruit 12 for 8-10 to show
• Track participants on spreadsheet
• Confirmation letter emails, texts, & calls
• Online: SignUpGenius
What is a screener:

- Detailed questions to ensure the target audience is represented in the room
- Extremely important
- Gender, SES, program participation, geographic location, ethnicity, etc.
SCREENER SAMPLE

- Question categories
  - Demographic
  - Psychographic
  - Open-Ended

<table>
<thead>
<tr>
<th>1. Age</th>
<th>Are you between the ages of 18-25?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes (CONTINUE)</td>
</tr>
<tr>
<td></td>
<td>No (TERMINATE)</td>
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</table>

<table>
<thead>
<tr>
<th>4. Psychographic</th>
<th>Which of the following best describes you?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>I have no children and pregnancy and childbirth are not in my immediate future (CONTINUE)</td>
</tr>
<tr>
<td></td>
<td>I am currently pregnant (TERMINATE)</td>
</tr>
<tr>
<td></td>
<td>I have a child/children and plan to have more in the future (TERMINATE)</td>
</tr>
<tr>
<td></td>
<td>Other (TERMINATE)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>9. Open Question</th>
<th>What is the biggest concern you have about health care for women in your age group?</th>
</tr>
</thead>
</table>

Sample questions from screener for focus group with young adult women.
# TRACK RECRUITMENT

## Waco Women ages 18-25 / 5:30 PM Thursday, [Date]

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone</th>
<th>Q1 Age 18-25?</th>
<th>Q2 Location</th>
<th>Q3 Full-time student at Baylor?</th>
<th>Q4 Psychographic</th>
<th>Q5 Dr. Visit (mix needed)</th>
<th>Q6 Ethnicity (mix outlined in screener)</th>
<th>Q7 Insurance (mix needed)</th>
<th>Q8 Education Level (mix needed)</th>
<th>Q9 Market Research/Health Care</th>
<th>Q10 Recent focus groups?</th>
<th>Q11 What is the biggest concern you have about health care for women in your age group?</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>Yes</td>
<td>Yes</td>
<td>Regular annual checkup</td>
<td>C</td>
<td>Private Insurance</td>
<td>H.S. Grad.</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Healthcare being too expensive</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Yes</td>
<td>Yes</td>
<td>Only when sick</td>
<td>C</td>
<td>Private Insurance</td>
<td>H.S. Grad.</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>More breast cancer</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Yes</td>
<td>Yes</td>
<td>Only when sick</td>
<td>C</td>
<td>Uninsured</td>
<td>Some H.S.</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>The fact that I can’t afford it</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Yes</td>
<td>Yes</td>
<td>Only when sick</td>
<td>C</td>
<td>Private Insurance</td>
<td>H.S. Grad.</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Cancer</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Yes</td>
<td>Yes</td>
<td>Only when sick</td>
<td>AA</td>
<td>Private Insurance</td>
<td>H.S. Grad.</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Not knowing if college age woman will still be covered</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Yes</td>
<td>Yes</td>
<td>Only when sick</td>
<td>AA</td>
<td>Private Insurance</td>
<td>Some C.</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Every plan I have looked at is too expensive (monthly &amp; co-pays)</td>
</tr>
</tbody>
</table>
EXERCISE TWO: WHO IS YOUR TARGET AUDIENCE?

- Research Question
- Target Audience
- Methodology
- Sample Questions

Ask yourself:
- Who do you want to reach?

Exercise: Develop a screener for your priority audience
IMPROVE ATTENDANCE

- **Reduce barriers** to attending when possible by offering:
  - Evening or weekend groups for those who work during the day
  - A familiar public setting
  - Transportation or cab fare + parking $
  - Child care services
  - Early bird incentive
DISCUSSION GUIDE

• Use FUNNEL approach
• 3-5 topics
• 10-15+ open-ended questions
  – Ranking/handouts
FOCUS GROUP QUESTIONS

4-Question Sequence

1. **Main:** What is biggest issue with X?
2. **Follow-up:** How significant is the problem?
3. **Probing:** Can you give me an example?
4. **Prompt:** You mentioned X. What about Y?

- Dig beyond initial responses to expand and get details
- Capture on flipchart
ANATOMY OF A GUIDE

Group with women about women’s health
Ground rules, confidentiality, no right or wrong answers

- Icebreaker: Names, how long in city

1. Perceptions and experiences with women’s health
2. Program experience (projective technique visual and metaphors)
3. Barriers/challenges
4. Motivators
5. Field test: brochures, pamphlets, websites, etc.

- Exit Question: What would your advice to our client be regarding X?
PROJECTIVE TECHNIQUES

• Designed to uncover people’s deeper feelings on a topic
• Purposely asks key questions in an indirect way
• Word association
• Photo sort
Moderator: “Let’s go around the room and share the picture you chose that describes where you are right now in life.”

“... I chose this box of crayons... I’m in a point in my life where I have so many different choices I can do, choose, and I don’t know what to choose from. All the colors symbolize something different.”

“I chose this picture because if you see there is a red rose amongst all yellow, and I feel like I’m at a point in my life where all the others around me have a different focus. I feel different from them ...”
FOCUS GROUP QUESTIONS

• Open-ended
• Broad
• Specific
EXERCISE THREE: CREATING FOCUS GROUP QUESTIONS

- Research Question
- Target Audience
- Methodology
- Sample Questions

**Exercise:**
Work in your small group and develop 2 topics and 3 questions per topic.
FOCUS GROUP RESULTS

PowerMeA2Z.org:
Summer 2016-present

PowerMeA2Z.org:
2013-Summer 2016
FIELD TESTS + USABILITY STUDIES

Field test questions explore:

• Relevance
• Attractiveness
• Persuasiveness
• Comprehensibility
• Actionable
  – Limited: website look & feel, navigation ease
  – Usability: tablets, in-depth interviews
FIELD TEST QUESTIONS

Sample Questions:

• “Who do you think this advertisement is for?”
• “In what ways, if any, are the people in the ad like you? How are they different?”
• “What would you do after seeing this ad?”
THE POWER OF FIELD TESTING

Current PowerMeA2Z Life Plan

Early iteration of the PowerMeA2Z Life Plan
LIGHTS, CAMERA, ACTION!
RESEARCH LOCATION

- Comfortable room in a convenient location with ample parking or access to bus line
- Public agencies, churches, libraries have free rooms available
- Table and chairs to seat a circle of up to 12 people (+ registration & food tables)
SUPPLIES

- Flip chart, markers, table tents
- Sign-in sheet + consent form
- Incentives (cash, gift cards, etc.)
- Digital recorders, extra batteries
- Snacks & drinks for participants
Sign-in Sheet

[Insert Project Name]
[Insert Time Focus Group Will Begin - City]

Date: [Insert Date]

<table>
<thead>
<tr>
<th>Name (Handwritten)</th>
<th>Signature</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
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<tr>
<td>3.</td>
<td></td>
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<td>4.</td>
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<tr>
<td>5.</td>
<td></td>
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<td>6.</td>
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<td>7.</td>
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<tr>
<td>8.</td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td></td>
</tr>
</tbody>
</table>

Consent Form

CONSENT TO PARTICIPATE IN A FOCUS GROUP

We would like to get input about different subjects and to learn about the quality and clarity of some messages and services, which is why you were invited here today. Your input will help provide other people with more effective messages and materials on health and educational issues.

By signing this consent form, you agree to participate in a focus group with a researcher from SUMA Social Marketing. The focus group will last 2 hours, and you will be compensated for your time. The focus group will be audio and/or video recorded. However, your remarks will remain confidential. Your full name will never be associated with any information we provide or produce.

There are no physical or psychological risks associated with this study. Any benefits you might receive cannot be affected by your participation in this discussion. You do not have to answer any question that makes you feel uncomfortable, and you may stop participating at any time. There is no penalty or punishment for choosing not to participate.

If you have any questions about this study or the focus group please feel free to ask the researcher directly before or after the group. If questions or concerns arise after leaving the focus group, please contact SUMA Principal, Susan Beag, at (512) 573-7383. We appreciate your willingness to share your opinions with us to improve our work with your community.

I ______________ understand the purpose and use of this focus group. I agree to participate.

________________________________________  ______________________________________
Signature of Participant                        Date
STAFF ROLES

• Moderator

• Assistant/note-taker
  – Makes notes off of focus group guide
  – Ideally not in same room as group but good client disguise

• Observers: Video feed option
  – Active observation & engagement
A GOOD MODERATOR

- Neutral party if possible
- Has adequate knowledge of the topic
- Keeps the discussion on track
- Can appropriately manage challenging group dynamics
FACILITATOR TIPS

• Set the stage with introductions, protocols
• Keep track of questions – be prepared to go off-script and probe where necessary
• Frequently repeat key phrases – also important for transcripts
• Ask people to raise their hands and count aloud when necessary
FOCUS GROUP STARTS AT 6PM

4:45 – Arrive & set up room
5:15 – Set out food
5:30 – People start arriving
5:30-6:00 – Small talk, eating
6:00 – Start the discussion
7:50 – Final comments or questions
8:00 – Wrap up and pay incentives
8:05 – DEBRIEF and clean up
THE USUAL SUSPECTS

- **Self-Appointed Experts:** “Thank you. What do other people think?”
- **The Dominator:** “Let’s have some other comments.”
- **The Rambler:** Stop eye contact; jump in at inhale
- **The Shy One:** Make eye contact; call on them; smile at them
ANALYSIS & REPORTING

- Debrief is critical
  - Best practice with observers, staff:
    - What were your top take-aways?
    - Most surprised by?
- Review notes
- Listen/transcribe audio files
ANALYSIS & REPORTING

- Identify key findings from debrief, notes
  - Look for trends, surprises – differences across groups

- Transcriptions segmented by group in binders

- Code data into categories
  - Repeated reading/listening
  - Coded thematically (audience, topic) + emergent data categories
  - Highlight quotes or write them down

- IDI’s – data entry
REPORT SECTIONS

• Executive summary with key findings
• Background & methodology
• Findings with analysis, quotes
• Conclusions and recommendations
VISUALS: TELL THE STORY

1. Formative Research
- 10 focus groups with Arizona women (18-25 years old)
- 5 focus groups with health-care providers
- 40 one-on-one stakeholder interviews

2. Campaign Development
Design, development, and distribution of PowerPacks (each containing a 100-day supply of vitamins, a health magazine, and campaign collateral) and interconception pamphlets

3. Website
Development of PowerMeAZ.org, where women complete an engaging five-question quiz about preconception health behaviors before ordering their PowerPacks

4. Health-Care Organization Partnerships
Building sustainability by educating the next generation of health-care providers, including those at:
- The Arizona Pharmacy Association
- The Arizona Nurses Association
- WIC
- Nursing schools
- Pharmacy schools

5. Community Grassroots Partnerships
Creation of partnerships with a wide range of grassroots organizations and individuals with direct access to women in the PowerMeAZ target audience, including:
- Promotoras
- Community health centers
- Local health departments
- Universities
- Employers
- Community-based organizations
- Native American resource centers
- Health-care providers

6. Health-Care Provider Education
Development and implementation of the following strategies:
- Workshops for health-care professionals featuring a nationally renowned speaker
- Outreach to 430+ OB/GYNs
- Training of members of the Association of Women’s Health, Obstetric and Neonatal Nurses (AWHONN)

7. Media
Creation and launching of a comprehensive media campaign with bilingual broadcast and digital media components (web, print, television, radio) to promote the PowerMeAZ website as a source of health information and PowerPack registration. SNA implemented social media advertising strategies on Facebook throughout 2016.

8. Evaluation and Enhancement
- Annual evaluation of 500 participants
- Research with doctors and interconception women
- Training partners (e.g., WIC, Health Start)
- Follow-up focus groups with participants
POWERPOINT DECK REPORTS

• 10-15 slides -- storyboard it out

Case Study: Arizona

• Distribute state supply of multivitamins with folic acid

• Educate young women on the importance of preconception health behaviors
MOVING FORWARD

• Share report and facilitate meeting with staff and/or stakeholders
  – Discuss key findings/recommendations
  – Collect additional insights from staff, stakeholders
  – Brainstorm how to fold into strategic planning and implementation
QUESTIONS?