CHAPTER 4

Research Techniques Simplified
Or
You Talk…We Listen

Conducting public opinion surveys and getting results that rival the professionals may be easier and less expensive than one would think. But it takes strategic planning. Effective strategic communication programs seek continuous feedback (public opinion) at the same time they are disseminating information – much like ongoing *push polling* (*The ABCs of Strategic Communication* – AuthorHouse).

The word *research* is derived from a French word meaning *travel through*. Whether primary (formal [you conduct]) or secondary (informal [previously conducted and available through such sources as the Internet]), *research* is the backbone of the strategic communication professions. It is universally accepted that research must be the very first step taken to assist in identifying target audiences, establishing baselines and benchmarks and tracking changes over time. (See *MAC Triad Plus* on page 61).

Succinctly, research is the *acquisition of information (AI*). AI leads to "Knowledge Creation." *Research* is conducted to determine as much as possible about the likely behavior of an audience – *behavior testing*.

The method or technique chosen is driven by the survey's objectives and goal(s). *Research* is the journey. The results are the destination. What is done with the results dictates the survey's success. Often, too many surveys acquire information that is rich with data, but analysis poor. To be credible, the information or results must be made actionable.

PR Play 4-1
We asked. We listened. We acted!

The major entrepreneurial/business skill is knowing how to take an idea to market. *Research* generates the data that:

- Determines the *need* for the idea or product.
- Assists in crafting key message points.
- Determines the best channels or vehicles by which to deliver the message(s).

PR Play 4-2
Benchmark

- A standard for comparing similar items such as research findings, the creative elements of a campaign, advertising results, etc.
- A point of reference – baseline. (A person or organization that others aspire to match or exceed.)
- A standard for comparing products to determine competitors' costs and quality with one's own.

Communication is a two-way process. To be effective, a program must reach all of its important publics. However, different audiences may need different strategic messages.

Research in and of itself is done on a regular, albeit, informal basis. It is not restricted to the strategic communication professions. For example, if a young man is interested in the marital status of a woman, he might ask someone who knows the woman. That is *research*. If we want to know a particular restaurant's hours, we either call on the phone or check the Internet. That, too, is *research*. This chapter will examine the more formal approaches.

First, some justification: In the often-used PR-PIE acronym (Chapter 2 – Synergy), sequentially, a *Purpose (P)* must be determined and agreed on before any of the other steps should ever be taken. Once that is accomplished, the *Research (R)* must be conducted and analyzed before *Planning (P)* can begin. It is during the *Planning* stage that goals and objectives are established, strategies devised and tactics explored. The *I* stands for *Implementation*. That is the dissemination of the message. The *E* is for *Evaluation*. Each stage is important. But for many, the data analysis or *E* stage may be the most important because this is when the future of a project, campaign or product launch may be decided. In fact, an organization's future might hinge on research evaluation.

A number of devices or techniques are used to gain feedback from your publics. The most scientific, and usually most accurate, is the opinion survey. A sound feedback system will alert management that a community will accept one idea, but vehemently reject another – unless more explanation is forthcoming.

Guarantees in strategic communication can be dangerous, but not when it comes to scientific polling. It *is* guaranteed that surveys help us learn new aspects about the audiences being served – data that will help the practitioner do a better job of educating audiences or publics. A well-executed and analyzed survey helps us discover new methods to improve communication. It also helps build a better understanding of an organization's mission. Many successful practitioners have stated they enjoy their jobs more than ever – because with understanding, through opinion polls, comes the support they deserve.

However, it is important to remember that survey results are only a snapshot of time – meaning that if the same questions were asked of the same audience a day or two later the results could differ depending on new information gathered by those being questioned.

PR Play 4-3

Benchmark Study

A measurement of audience attitudes before and after a (strategic) public relations campaign. A starting point (baseline) so that behavioral change can be accurately measured.

Eileen Weisman – The W Group – Houston, Texas

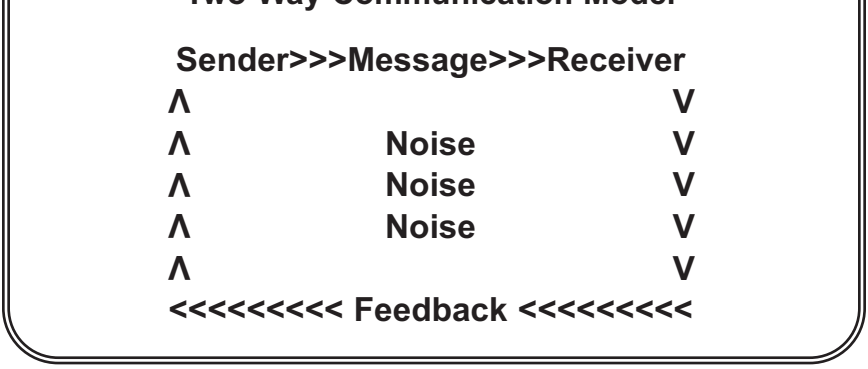
Carol Eaton, Ph.D., is a communication research specialist with the Jefferson County Schools in Golden, Colo. She advocates research to improve communication with her district's publics – and to validate the work being done by the communication office.

Dr. Eaton uses research to:
- Replace hunches
- Identify root causes
- Improve decision making

- Inform her publics about progress
- Acquire a list of questions that may be circulating throughout her community

PR Play 4-4

Two-Way Communication Model



More Reasons to Conduct Research

- Source credibility – Well executed and analyzed surveys generate data that, when properly used, show company representatives who conducted and reported the results as honest, objective, knowledgeable and experienced (expert) on their subject and not just representative of a special interest.
- Decrease top management isolation – Too often, chief executives sit in their ivory towers and lose touch with their publics.
- Assist in the audience persuasion process – Determining attitudes (inner feelings) and opinions or behavior (expression of those attitudes) so that new messages can be crafted if attitudinal changes are needed.
- Identify Key Communicators (opinion leaders/influencers/consumption pioneers/leaders of people).
- Pretest messages.
- Uncover trouble spots.
- Generate news coverage through the dissemination of survey results.

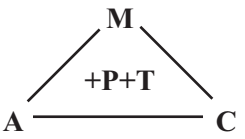
Reasons *Not* To Conduct Research

Jackson, Jackson & Wagner (Exeter, N.H.), the public relations firm founded by the late Patrick Jackson, says an organization is wasting its time doing research if:

- The organization won't listen, respond or change.
- The audience is over-saturated.
- There is an unstable environment.

However, the stubborn practitioner still might try to take the research data and attempt to "move" the company or organization.

PR Play 4-5
MAC Triad Plus



M=Message A=Audience C=Channel P=Purpose T=Timing

Because it has already been determined that a survey of some sort will be conducted, the *C* in the *MAC Triad* can be checked off. In this case, the *Channel* is the survey. The methodology (technique or research action) is still to be decided. That is where the *P* comes in. The strategic professional must ask, why? What is the *Purpose*? What do we want to learn from this exercise? The next step is targeting (identifying) the *Audience* or *Audiences*. It might be one or more of the many demographics. Timing is crucial to the execution of the plan. While all three coordinates of the *MAC Triad* must click, a successful outcome is dependent on the *timing*. Ask yourself, "What is the best time to engage the minds of my target audience to assure they see or hear the message?" Many practitioners refer to this as the aperture – or opening.

PR Play 4-6
Demographics

The vital statistics about the human population, its distribution and its characteristics (age, gender, income, education, etc.). Used for audience segmentation and fragmentation.

In many cases a survey's purpose will assist in crafting a future strategic message, the *M* in the *MAC Triad*, whether it is to persuade a public to adopt an idea or to purchase a product. However, it is not unusual to include a message in the introduction of the survey. For example, a local community trying to determine whether to enlarge a current library or build a new one could mention that choice in the survey's introduction. It helps communicate that the local government cares enough to ask its residents (used in push polling – see page 83).

PR Play 4-7
Psychographics

Psychological characteristics many times determined by standardized tests. Used for audience segmentation and fragmentation. Any attributes relating to personality, values, attitudes, interests or lifestyles. They are also called IAO variables (for Interests, Attitudes and Opinions). Combined with *demographics and geodemographics, psychographics* play a key role in strategic planning.

PR Play 4-8
Geodemographics

A contraction of geography and demographics. A method of combining geographic and demographic variables. The demographics of individuals or groups who reside in the same geographic area or region.

PR Play 4-9
Be Strong

"Asking questions is a sign of strength not weakness…so don't be afraid to ask questions."

Aladdin Factor

PR Play 4-10
How To Do It
The Basics of Conducting a Survey

1. Decide what you want to learn from the survey.
2. Ask why you want to learn this.
3. Ask yourself whether you could get this information without doing a survey.
4. Decide who your public or audience is going to be.
5. Determine the type of survey method (PR Play 4-11) you will use.
6. Establish confidence levels (PR Play 4-15) for your survey.
7. Determine the required resources – what, by when and who will perform the task.
8. Develop a timeline for your survey from start to finish – including pretesting.
9. Decide how the information will be analyzed and the results reported – keeping in mind that, if possible, a copy of the report or summary should be sent to those surveyed.
10. Report should be formatted to include:
    – title
    – table of contents
    – executive summary of findings
    – tabulation of data
    – comparative data
    – analysis of findings
    – recommendations
    – copy of questionnaire

Former Rowan University Communication Professor Donald R. Gallagher, strongly believed before the first question is put on paper and the first respondent is approached, a few preliminary questions must be asked:

1. **What is the purpose of the survey?** What is the problem? Is it the public's attitude toward some action your organization is taking? Its image? Its service or product? Don't try to cover too much in one survey. It might get too long and discourage many respondents.

2. **Is a public opinion poll the best way to get the needed information?** Be sure that some of the information you are seeking is not

already available from such other sources as the U.S. Census Bureau, county or local records.

3. **What are we going to do with the results?** Are you willing to implement the changes if the results are valid?

4. **What specific audiences will we question?** The entire universe (population) or a segment/fragment of the universe may be chosen depending on the purpose of the survey. Carefully examine the available demographics of the universe.

5. **How long should we take to conduct the survey?** If it takes too long, results will be outdated and of little value. A good guideline is to complete the interviewing within a period of 10 days or two weeks. Depending on the situation, the data may hold for just a few days or weeks and most certainly its life span will be no longer than 90 days.

6. **How much money do we have to conduct the survey?** With more money, you can survey a larger sample. This reduces the margin of error and gives you a broader view of the population surveyed.

7. **How will the data be analyzed, reported and applied?** Ask yourself whether you should use data processing such as *SPSS*® – originally, *Statistical Package for the Social Sciences* – a computer program used for statistical analysis and also the name of the company (SPSS Inc.) that sells it (among the most widely-used programs for statistical analysis in social science). A computer can be very helpful in tabulating the results. Hand tabulation will take a considerable amount of time. The results should be reported through a news conference, the Internet (website link), public meetings (internal and external), news releases and/or direct mail (see No. 12 below). As for applying the results, a "golden" rule to follow is: ***We asked. We listened. We acted!***

8. **Should an outside agency conduct the survey?** It might be wise to hire an outside agency if you don't have the time or the trained people available to direct such a survey. The results might seem more credible to the public if an outside agency conducts the survey.

9. **When is the best time to conduct a survey?** In real estate, it is location, location, location. When it comes to feeling the pulse of a community, timing is everything. A time of crisis is not the best time. Look at the calendar and see what events might influence/interfere with a survey.

10. **How many people must be questioned to determine the thoughts of the entire population?** It is not necessarily the size of the sample, but rather how scientifically it was chosen. In an absolute scientific survey, everyone in a population has the same opportunity to be questioned as everyone else. Frank Newport of The Gallup Organization supports that premise. He says, "The method in which the sample is chosen is far more important than the sample size."

11. **What is the best method of gathering the information on a survey?** The seven most commonly used methods are the mail questionnaire, the drop-off/pick-up questionnaire, the personal interview, the telephone interview, the omnibus or piggyback survey, the Internet (Web and email) survey and focus panels. The personal interview is the best; the telephone method is the most functional; and the mail questionnaire is the worst. The jury is still out on the effectiveness of the Internet survey.

12. **When should the decision on publicizing results of a survey be made?** The date for publicizing a survey's results should be announced at the same session in which an organization or company is announcing that it is going to conduct a survey. By taking such a pro-active stance, the media, thus the public, will have confidence that no matter what the results reveal – positive or negative – they will be released. This will help gain on-going media support. It strengthens the organization's credibility.

PR Play 4-11

Seven Survey Methods

Personal Interview
Telephone Interview
Drop-off/Pick-up Questionnaire
Mail Questionnaire
Piggyback (Omnibus) Survey
Web and email Surveys (Internet)
[can be "snowballed"]
Focus Panels

Advantages and Limitations of Seven Survey Methods

Personal Interview

Advantages

- High percentage of return.
- Information apt to be more correct than the other methods.
- Additional information can be obtained.
- Respondent misunderstanding can be clarified.

Limitations

- Cost of transportation.
- Trained personnel required.
- Great amount of time needed.
- Cost of returned questionnaire is great.

Telephone Interview

Advantages

- Less expensive than personal interview.
- Short periods of time needed to complete survey.
- No cost for transportation.
- Minimal training of personnel.

Limitations

- Unlisted phones.
- Easy for respondent to hang up.
- Caller I.D.

Drop-off/Pick-up Questionnaire

Advantages

- High returns in short period of time.
- Respondent misunderstanding can be clarified.
- Minimal training of personnel.

Limitations

- Transportation costs.
- Need many volunteers or workers.

Mailed Questionnaire

Advantages

- Mailing costs are cheaper than transportation costs.

- May reach groups protected from solicitors and investigators.
- Respondent may be more candid.

Limitations

- The number of returns is usually low.
- Anyone at residence may fill it out.
- An irate citizen may collect many questionnaires from neighbors and answer all of them.
- The responses will not represent the thinking of total population.

Piggyback (Omnibus) Survey

(An alternative survey method – an organization "buys" a question or questions on another organization's survey. It is a money-saving technique. However, it must be determined that the piggyback/omnibus survey targets the same audiences you want to reach or this would be considered a major disadvantage.)

Advantages

- Less expensive.
- Makes use of a professional pollster's expertise.
- Can focus on a few questions while obtaining demographic data from administrator of larger survey.

Limitations

- Organization can obtain only a small snapshot of public opinion with one or two questions.
- Subject matter must be relevant to the general public.
- Must use the timelines of polling organization.
- Little or no control over question placement (unless predetermined).
- Must target the same audiences you are trying to reach.

Web and Email Surveys

Advantages

- Can be announced on banner ads or other websites or online networks.
- Email invitations to target audiences.
- Telephone individuals with an invitation to participate.
- Send post cards to invite participation.
- Can be "snowballed" – forwarded to each recipient's contacts (Snowball surveys may be random, but not scientific. This will increase audience, but results may not be reliable.)

Limitations

- Little control of exact characteristics of the respondents since a website is accessible to almost anyone with a computer and Internet access.
- Respondents with limited computer experience may become frustrated and either answer incorrectly or seek help from someone who may influence their responses.
- Could be a so-called "self-selected" or *volunteer* survey – you ask to be surveyed or go on Internet and answer questions from a pop-up window (similar to "intercept" survey [see *The ABCs of Strategic Communication* – AuthorHouse]).
- Many times, the results of these surveys are non-scientific.

Focus (Panels) Groups

Advantages

- Good alternative to individual interviewing.
- Widely used in advertising, marketing and public relations to help identify attitudes and motivations of important publics.
- Used to form or pretest message themes and communication strategies before launching a full campaign.

Limitations

- Non-scientific (to conduct scientific focus panels is prohibitively expensive although it can be done).
- Informal rather than formal research technique.
- Develops qualitative (characteristic) information rather than hard data (quantitative).
- Results cannot be summarized by percentages or projected onto an entire population.

Types of Formal Sampling

Probability – Survey in which every member of the targeted audience has an equal chance (exactly the same odds) of being selected for questioning. (Also known as *Systematic* [*Scientific*] Sampling – a *Chance* Survey – more exact than *Random*.) Results reflect the opinions of the entire universe (total population) from which the sample is chosen because the sample is representative of the larger population being studied. The members of the sample are scientifically selected, that is, they are selected according to a system that gives everybody an equal chance

of being asked to participate. Done correctly a sample should demonstrate what is already known about the total universe – age, gender, education, ethnicity, etc. If those factors match, it is an excellent indication that the sample is representative of the population being surveyed.

- Selection of sample is purely by *chance*.
- The size of the universe (total population) has no bearing on the size of the sample. *(go to page 76)*

PR Play 4-12
Conducting Focus (Panels) Groups

Focus groups are a powerful means to evaluate services or test new ideas – but to conduct them without a thorough knowledge is a daunting task and probably will not generate the desired responses and other information.

According to Dr. Carter McNamara of Authenticity Consulting, LLC – Minneapolis, focus groups are interviews conducted in small groups – six to 10 people at the same time in the same group. One can get a great deal of information during a focus group/panel session.

Preparing for the Session

1. Identify the major objective (purpose) of the panel.
2. Carefully develop up to six questions (see below).
3. Plan your session (see below).
4. Call or email potential members to invite them to the meeting. Send a follow-up invitation with a proposed agenda, session time and list of questions the group will discuss. Plan to provide a copy of the report from the session to each member and let them know you will do this.
5. About three days before the session, call and/or email each member to remind them to attend.

Developing Questions

1. Develop five to six questions – Session should last one to one and a half hours – so that five or six questions can be discussed.
2. As with other surveys, determine what problem or need will be addressed by the information gathered during the session. For example, examine if a new product or service will work, or further understand how a program is failing, etc.

cont.

PR Play 4-12 continued

3. Focus groups are basically multiple interviews. Therefore, many of the guidelines for conducting focus groups are similar to the guidelines for conducting interviews.

Planning the Session

1. Scheduling – Plan focus panel to run from one to two hours, but an hour and a half is ideal. Lunch sessions have proven successful although you must tell participants that meetings could and probably will run longer than the normal lunch hour.
2. Setting and Refreshments – Hold sessions in a conference room, or other setting with adequate air flow and lighting. Configure chairs so that all members can see each other. Provide name tags for members. When providing lunch, keep it to a simple, easy-to-eat meal – and remember health conscious participants.
3. Ground Rules – It is critical that all members participate as much as possible, keeping the session moving along all the while generating useful information. Because the session is often a one-time occurrence, it is useful to have a few short ground rules that sustain participation and keep the focus. Dr. McNamara suggests the following three ground rules:
   • keep focused
   • maintain momentum
   • get closure on questions
4. Agenda – Consider this one from Dr. McNamara:
   • welcome
   • review of agenda
   • review of goal of the meeting
   • review of ground rules
   • introductions
   • questions and answers
   • wrap up
5. Membership – Focus groups are usually conducted with six to 10 members who have some similar characteristics – similar interests, similar age group, etc. Select members who are likely to actively participate and be reflective. A challenge is attempting to select members who don't know each other.

cont.

PR Play 4-12 continued

6. Have one or more co-facilitators take notes. Also, record the session with either an audio or video recorder. Don't count on the note takers (unless they are "court" stenographers) or your memory.

Conducting the Session

1. The major goal of panel facilitation is collecting useful information to meet the goal or objectives of the meeting.
2. Introduce yourself and the co-facilitator(s).
3. Explain the process and how the responses are being recorded manually and electronically.
4. Try to adhere to the agenda – (see "agenda" above).
5. Carefully craft each question before that question is addressed by the group. Allow the group a few minutes for each member to carefully record their answers. Then, facilitate discussion around the answers to each question, one at a time. Don't allow participants to talk over each other.
6. After each question is answered, carefully summarize what you heard (the note taker may do this).
7. Ensure even participation. If one or two people are dominating the session, then call on others. Consider using a round-table approach, including going in one direction around the table, giving each person one minute to answer the question. If the domination persists, note it to the group and ask for ideas about how the participation can be increased.
8. Closing the session – Tell members that they will receive a copy of the report generated from their answers, thank them for coming and adjourn the meeting.

Immediately After Session

1. Verify if the tape recorder, if used, worked throughout the session (and be sure to check it before beginning the session).
2. Check handwritten notes and add comments if necessary – clarify any hard to read notes and be sure to number the pages.
3. Write down any observations made during the session. For example, where did the session occur and when, what was the nature of participation in the group? Were there any surprises during the session?

PR Play 4-13

Key Research-Related Definitions

(Glossary at end of chapter)

- **Primary Research** – New research. Research you do yourself.
- **Secondary Research** – Information or data available through another's research (U.S. Census Bureau; Gallup, a newspaper, etc.).
- **Formal, scientific or quantitative research** – Rigorous use of the principles of scientific investigation such as the rules of empirical observation, random sampling in surveys, comparison of results against statistical standards and provision for replication of results.
- **Informal or non-scientific research** – Investigation without use of scientific method (usually undertaken as exploratory and/or preliminary to more rigorous methods).
- **Empirical Research** – Any activity that uses direct or indirect observation or experiment to gather information. Empirical data can be analyzed quantitatively and qualitatively.
- **Formative Research** – Usually not scientific. Formative research such as focus groups and mall intercept interviews with consumers are used to help test messages and materials designed to motivate target audiences. Formative research is a critical step in crafting research questions and usually occurs before a program is designed and implemented.
- **Identity** – What you are – how you want to be perceived.
- **Image** – How people perceive you.
- **Attitude** – Predisposition to act (inner feeling).
- **Opinion** – Expression of attitude (behavioral change).
- **Public Opinion** – Accumulation of individual opinions on an important matter in public debate affecting the lives of people.
- **Propaganda** – One-sided argument. The use of ideas, information or opinion for the purpose of furthering or hindering a cause or promoting or denigrating an idea.
- **Manipulation** – To control by skilled use; to influence shrewdly or deviously. To get into the one's mind.
- **Convince** – Change an attitude – for a longer period.
- **Persuade** – Change the audience's behavior or getting someone to do something – even for a short time.
- **Feature** – What comes with the package – characteristics.
- **Benefit** – How the audience perceives the feature.
- **Active Audience** – Interested.
- **Passive Audience** – Non-interested.

(from page 69)

- The results can be projected (reflection of opinions of universe or targeted audience) with a predetermined margin of error (the number of times, or likelihood, out of 100 that the results of the survey would fall within the same intervals. Plus or minus 3 means that three percentage points could be added or subtracted from the results. Example: Company A conducts a survey and determines that 68 percent of its customers are "Very Satisfied" overall. Generally speaking, if a similar survey were taken 100 times, 95 times out of 100 the results would show that anywhere from 65 percent to 71 percent of the customers are "Very Satisfied").

Types of Probability Samples:

- **Simple** – Sample resembles a lottery. Respondents are chosen from a "hat" or "box."
- **Stratified** – Sample is "tailored" to look like the target audience. If the survey's purpose is to determine the opinions of women 18 to 35, then only a scientific sampling of women 18 to 35 is drawn. It is also known as ***probability proportional to size*** because it puts the characteristics in the sample in the same proportion as they actually exist.
- **Systematic** – Sample uses lists and then draws every "nth" number on the list to put into the sample. **Formula**: Divide the sample size you want into the total number of names/numbers on the list. Between that number and the number one, choose a starting number by chance. That's your first respondent. Go every "nth" number from there (or allow a computer program or table of numbers to select respondents).
- **Area (cluster)** – Sample uses one of the other three methods to choose geographic sections of a community or subdivisions to get to a residential address on a street.

Non-probability – Each person in a universe (total population) is *not* given an equal chance of being included in the sample.

- Selection of sample is subjective and may not necessarily be by chance.
- Results cannot be projected to the universe (total population) with any known certainty.

Types of Non-probability Samples:

- **Purpose (Judgmental)** – Respondents are deliberately chosen by knowing the type of people they are or where they are located. (Example: Used in political polling of subjectively chosen polling places.)

- **Quota** – Selection of a group to be polled that matches the characteristics of the entire audience. (Example: Interviewers select respondents according to certain demographics such as age, gender, ethnic group, education, income, etc. If census data shows a universe [audience being surveyed] has 57 percent women and 43 percent men, a quota sample would choose participants based on that data.)
- **Intercept** – Also known as *chunk*. Many times take place in shopping malls where interviewers stop passersby and ask for their cooperation.
- **Snowball sampling** – Also known as *chain sampling, chain-referral sampling, referral sampling* is a non-probability sampling technique where existing study subjects recruit future subjects from among their acquaintances usually by email or blast emails. Thus the sample group appears to grow like a rolling snowball. As the sample builds, enough data is gathered to be useful for research. As sample members are not selected scientifically, snowball samples are subject to biases. For example, people who have many friends are more likely to be recruited into the sample.

  It is widely believed that it is impossible to make unbiased estimates from snowball samples, but a variation of *snowball sampling* called *respondent-driven sampling* has been shown to allow researchers to make limited unbiased estimates from snowball samples under certain conditions. *Snowball sampling* and *respondent-driven sampling* also allow researchers to make estimates about the social network connecting the hidden population.
- **Volunteer** – Also known as *self-selected, convenience* or *casual survey*. Respondents volunteer themselves. The Internet, newspapers, radio and television stations, and magazines that encourage or allow listeners, viewers or readers to respond fall into this sampling technique.

Types of Informal Sampling

- **Newspaper and magazine articles** – Generally speaking, these could be news or feature stories. They could also be reports about other scientific research, which would make it secondary research for the reader. Readers must be aware of agenda setting (see *The ABCs of Strategic Communication* – AuthorHouse).
- **Television and radio programs** – This would be similar to reading stories in newspapers and magazines.
- **Discussions with acquaintances** – An excellent method for gathering non-scientific data and general information on a topic.

PR Play 4-14
More Steps to Follow

1. List your needs (financial and personnel).
2. Get financial commitment to conduct the survey from start to finish.
3. Select the public that will be sampled and the actual names of people – if possible.
4. Design an easy-to-use format (research action) for the survey and compose the questions (research questions).
5. Refine your questions and adjust the format.
6. Train your interviewers (if you are conducting the survey in-house).
7. Adhere to guidelines to be certain that all steps of the survey project are completed on time.
8. Conduct the survey and prepare the responses for tabulation (Use *SPSS*® if possible).
9. Analyze the results.
10. Report your findings (with recommendations if requested).

- **Surfing the Internet** – A quick, easy and comfortable way to gather data whether scientific or not.
- **Observing public meetings** – Excellent method for feeling the non-scientific pulse of a universe.

There May Be Pitfalls

Conducting an opinion survey from start to finish sounds easier than it is. To achieve the kinds of results that you want takes many hours of hard work. And, no doubt, your superiors will want you to continue performing your other duties as well. You will have to be willing to work closely with other staff members of your company or organization and with staff members or outside vendors chosen to conduct the interviews. At times, you will probably ask yourself why you got involved in this kind of project in the first place.

But be assured, the feedback you have gathered from your audience or audiences should improve your total program – whether it be just public relations, marketing or total *integrated marketing communication*. The satisfaction of knowing this is what makes the advantages outweigh the pitfalls.

PR Play 4-15

Sample Size for Two Levels of Confidence with Varying Degrees of Tolerance

Tolerance of Error In Percentages (+ or -)	95 Times in 100	99 Times in 100
0.5	38,400	66,000
0.7	19,592	33,673
1.0	9,600	16,500
1.5	4,267	7,333
2.0	2,400	4,125
2.5	1,536	2,640
3.0	1,005	1,833
3.5	784	1,347
4.0	600	1,031
4.5	474	815
5.0	384	660
6.0	267	458
7.0	196	337
8.0	150	288
9.0	119	204
10.0	96	165
15.0	45	74

Resources – Publications

- *A Hands-On Guide to School Program Evaluation,* Edward A. Brainard
- *Data Analysis for Comprehensive Schoolwide Improvement,* Victoria L. Bernhardt

- *How to Conduct Surveys: A Step-by-Step Guide,* Arlene Fink & Jacqueline Kosecoff
- *PACE: Polling Attitudes of Community on Education Manual,* Phi Delta Kappa International
- *School Climate: Measuring, Improving and Sustaining Healthy Environments Learning*, H.J. Freiberg (Ed.)

Resources – Websites

- Annenberg Institute for School Reform (www.annenberginstitute.org)
- Center for the Study of Testing, Evaluation and Education Policy (www.bc.edu/research/csteep)
- Gallup Organization (www.gallup.com)
- Harris Interactive (www.harrisinteractive.com)
- Monitoring the Future (www.monitoringthefuture.org)
- National Center for Educational Statistics (www.nces.ed.gov)
- Phi Delta Kappa (www.pdkintl.org)
- U.S. Department of Health and Human Services (www.os.dhhs.gov)
- Cracked Egg (Persuasion) Model (Chapter 2)

Research Terms Every Practitioner Should Know

active audience – Interested, already sold, but seeking more information.

anecdotal – Based on personal observation, case study reports or random investigations rather than systematic/chance scientific evaluation. Results are considered *anecdotal evidence.*

attitude – Predisposition to act (inner feeling).

banner – A question or demographic factor used as the basis for cross-tabulation.

before and after survey – Survey is taken of the target audience before communication is put into effect and repeated after the audience has been exposed to the communication. *Before* establishes the baseline.

benchmark survey – Same as before and after survey (above).

benefit – How the audience perceives the feature.

casual survey – Also known as *self-selected survey*. Respondents volunteer themselves. The Internet, newspapers, radio and television stations, and magazines that encourage or allow listeners, viewers or readers to respond fall into this sampling technique.

chance survey – A sample where each member of the population has an equal chance of being chosen. Also referred to as a scientific random sample; or simple random sample.

classification or demographic question – Survey question designed to generate data about the respondent such as age, education, income and gender.

closed-end or forced-choice question – Survey question in which only predetermined options are accepted as responses from respondents.

cluster sample – A form of probability (scientific or chance) sample where respondents are drawn from a random sample of mutually exclusive groups (usually geographic areas) within a total population – also called an area sample. Identifying these groups in advance could save costs.

communication audit – A complete analysis of an organization's communication – internal and external – designed to reveal how an organization wants to be perceived by designated publics, what it is doing to foster that perception and how it is, in fact, perceived.

confidence level-95 in 100 – In an infinite number of similarly designed and executed surveys, the percentage results would fall within a given margin of error in 95 percent of these surveys.

content analysis – Study of publications, print and electronic media reports, speeches and letters to measure, codify, analyze and/or evaluate the coverage of an organization, its people and its activities. In a strict sense, content analysis uses a rigorous, statistical methodology. In many cases it is less formally structured.

convince – Change an attitude for a longer period.

cross-tabulation – Statistical analysis of subset of data created from within the data. For example, how did all the men in the sample respond to the question?

database retrieval systems – Information compiled from print, broadcast and other sources stored in computer memories and made available on-line for random access and retrieval and subsequent print-outs.

demographics – The vital statistics about the human population, its distribution and its characteristics (age, gender, income, education, etc.). Used for audience segmentation and fragmentation.

depth interviews – One-on-one interviews with key respondents that are generally conducted using a prepared discussion guide rather than a questionnaire.

dichotomous question (simple) – Survey question that provides two contradictory response options. Choices can include yes or no, approve or disapprove, like and dislike.

empirical research – Any activity that uses direct or indirect observation or experiment to gather information. Empirical data can be analyzed quantitatively and qualitatively.

external factors – Elements of the problem situation that are found outside the organization (often addressed in the limitations section of a project).

feature – Prominent or distinctive characteristics of a product's use, construction or design. Also referred to as attributes.

focus group interviews – A qualitative public relations/marketing research technique where an independent trained moderator or facilitator interviews (leads discussion of) a small group of consumers (six to 10) from the target audience in an informal setting to get a reaction to an issue, new product, brand name, advertising or other communication efforts. Also referred to as a *Customer Panel*.

formal, scientific or quantitative research methods – Rigorous use of the principles of scientific investigation such as the rules of empirical observation, random sampling in surveys, comparison of results against statistical standards and provision for replication of results. Research that provides objective and systematic data gathered from scientifically representative samples (employs the scientific method).

formative research – Usually not scientific. Formative research such as focus groups and mall intercept interviews with consumers are used to help test messages and materials designed to motivate target audiences. Formative research is a critical step in crafting research questions and usually occurs before a program is designed and implemented.

geodemographics – A contraction of geography and demographics. A method of combining geographic and demographic variables. The demographics of individuals or groups who reside in the same geographic area or region.

identity – How an organization or firm wants to be perceived – what you are.

image – Much like reputation – how the public perceives an organization or firm. It is the opinion or concept of something that is held by the public and/or interpreted by the mass media.

impact evaluation – Determining to what extent a campaign informed, persuaded, influenced or changed public opinion and/or behavior in the desired direction.

informal methods – Exploratory research that is not gathered from scientifically representative samples. Includes personal contact, informants, community forums, advisory committees, field reports, and phone and mail analysis.

informal or non-scientific research – Investigation without use of the scientific method (usually undertaken as exploratory and/or preliminary to more rigorous methods).

intercept interview(s) – Random, but unscientific, consumer research method – often used at shopping malls and other areas (stadiums, college campuses, resorts) where large numbers of people congregate – where interviewers randomly stop passersby to ask questions and gather data. This method yields rich data on preferences, attitudes and needs – useful for screening a large number of concepts or issues quickly and at reasonable cost. *Intercept interviews* offer a quick, inexpensive method to pretest advertising campaign themes, headlines and value propositions.

intercept survey – Also known as *chunk survey*. Many times intercept surveys take place in shopping malls where interviewers stop passersby and ask for their cooperation.

internal factors – Perceptions and actions of key actors in the organization, structure and process of organizational units somehow related to the problem, and history of the organization's involvement.

judgmental or purposive sample – A sample based on the investigator's best judgment to determine what would be representative. Should be used only when the consequences of possible errors from bias would not be serious and when other sampling is impractical.

leading question – A question that is worded so as to lead a respondent to answer in a particular way. For example, "You don't like this competitive product, do you?"

Likert Scale – Response set that uses five options, generally verbs, responding to questions: *strongly agree/agree/neutral/disagree/strongly disagree* – measuring both quality and strength of responses.

mail survey – Research conducted by mailing questionnaires to the sample and tabulating the responses that are completed and mailed back.

manipulation – To control by skilled use. Getting into one's mind with persuasive, strategic messages. Sometimes considered shrewd or devious – but when messages are open, honest, through and valid, they are ethical.

margin of error – The range, plus or minus, within which results can be expected to vary with repeated random samplings, under exactly similar conditions. There is an inverse correlation between sample size and margin of error.

multiple choice question – Survey question that offers three or more alternatives. Often a three-point or five-point rating scale.

nth number of systematic sampling – A method of drawing a sample by dividing the sample size into the universe to obtain an interval to be used to select respondents. For example, if the universe were 1,000 and the sample size were 100 the interval would be 10. Consequently, every nth name from a directory could be the 9th, 19th, 29th, etc. A random method must be employed to select the starting point in the universe from which each nth name is to be drawn.

omnibus survey – Also called a piggyback survey or subscription study. A type of public relations or marketing research survey usually administered for one main organization, but may contain a question or questions from other firms or organizations for a fee. Some information, such as demographics and psychographics, may be shared. Organizations buy into other surveys either to save money or because they do not need a survey on their own. Omnibus surveys, like other polling, are commonly organized by a major professional marketing research company, where different cross sections of the community are interviewed by probability (scientific) sampling at regular intervals about attitudes and opinions toward issues, buying habits, product and brand preferences, etc. They are called Omnibus surveys because any marketer can join in for a fee to add questions.

open-ended question – Survey question that does not ask the respondent to select from given alternatives but instead allow answer in the respondent's own words. Answers are called verbatim.

opinion – Expression of attitude (behavioral change).

passive audience – Uninterested. Will usually rely on surrogates (stand-ins) to gather information.

personal interview – Face-to-face questioning of the respondent by the researcher. Once the most common surveying method.

persuade – Changing the audience's behavior or getting someone to do something – even for a short time.

population – The individuals whose opinions are sought in a survey. The population can be as broad as every adult in the United States or as focused as liberal Democrats who live in the Fifth Ward of Chicago and voted in the last election. The sample is drawn to reflect the population. Sometimes called the *universe*.

pretesting – A preliminary survey of a small sample to determine if the questionnaire is properly drawn.

primary research – New (original) research study. Research you do yourself.

problem statement – A brief summary of the problem written in present tense describing the situation and the general goal(s) of the program.

propaganda – One-sided argument. The use of ideas, information or opinion for the purpose of furthering or hindering a cause or promoting or denigrating an idea.

proportional sampling – A sampling method used to ensure that a survey contains representatives of each subset in the population being studied, according to the proportion of their representation in the universe. For example, if a certain population contains 53 percent women, a proportional sample would contain 53 percent women.

protocol – Sometimes referred to as research design. The controlling plan for a marketing research study where the methods and procedures for collecting and analyzing the information to be collected are specified. The plan of action follows a strict format to assure that objectives are met.

psychographics – Psychological characteristics many times determined by standardized tests. Used for audience segmentation and fragmentation. Any attributes relating to personality, values, attitudes, interests or lifestyles. They are also called IAO variables (for Interests, Attitudes and Opinions). Combined with *demographics* and *geodemographics*, *psychographics* play a key role in strategic planning.

public opinion – Accumulation of individual opinion on an important matter in public debate affecting the lives of people.

public relations audit – A research tool used specifically to describe, measure and assess an organization's public relations activities. Used to provide guidelines for future public relations programming. Can include public opinion surveys, content analysis, program evaluation and recommendations for the future.

push (survey) polling – Opinion surveys designed to provide information at the same time data is being gathered – communicates a message while asking a question. Information or leading questions could be manipulative and influence responses.

questionnaire – The introduction, explanation and questions posed – in person, on the phone or through the mail – by the researcher to the respondent.

random sample – A sample taken from any given population in which each person maintains an equal chance of being selected. This differs a bit from a scientific random sample in that a random sample may be taken from a predetermined audience such as students in a particular classroom or residents of a particular neighborhood. To be purely scientific, every member of the universe must have the exact same "chance" of being chosen as everyone else.

random-probability (scientific or chance) sample – A sample selected in such a manner that each element of the universe has an equal or known chance of being in the chosen sample.

readability tests – Tests designed to measure the grade level of reading skills a particular piece of writing demands from its audience.

readership (listenership or viewership) studies – Research conducted periodically to determine patterns of readership of print media and television.

reasonable certainty – Many times, referred to as *Reasonable Certainty* of "no harm." Something that appears clearly established or assured based on research and other investigation. Public relations counselors often rely on *Reasonable Certainty* before making recommendations.

reception analysis – Research that focuses on the way individuals draw conclusions or make meanings from strategic media messages. Reception analysis has some similarity with uses and gratifications research, but is much more likely to use an ethnographic approach involving in-depth interviews, participant observation, etc.

reference group – A group of people that a researcher uses as a guide for behavior in a certain situation. Also a group of people or an organization that an individual respects, identifies with or aspires to join. A group with which a person identifies in some way and whose opinions and experiences influence that person's behavior. For example, a basketball fan might buy a brand of athletic shoe worn by a favorite player.

reliability – The degree of accuracy with which data in a marketing research study has been collected. A reliable marketing research study should produce the same or similar results time after time.

representativeness – The degree to which a sample of an audience in a marketing research study represents the characteristics of the population as a whole.

research – A scientific systematic investigation to gather information about attitudes (predisposition to act or inner feelings) that form opinions (expression of the attitude) and establish facts. It is a search for knowledge. Research is conducted to improve the efficacy and/or effectancy of public relations and advertising. Seminal research is research never done before. Planned, carefully organized, sophisticated fact finding and listening to the opinions of others.

research design – Sometimes referred to as protocol. The controlling plan for a marketing research study where the methods and procedures for collecting and analyzing the information to be collected are specified.

research objectives – The purpose of a marketing research study. Many times, "purpose" becomes the first step in the Public Relations Process – even before research (research, planning, implementation, evaluation – known as PR-PIE when purpose is included).

researcher – The practitioner responsible for designing and carrying out the research project.

response bias – The inclination of respondents in a marketing research survey to give the answer they believe the interviewer wants to hear. Well-trained survey takers can recognize response bias and note it on the responses.

sample error – The degree to which the opinions of the sample may differ from the opinion of the entire population.

scientific random sample – A sample where each member of the population has an equal chance of being chosen. Also referred to as *Chance Survey* or *Simple Random Sample*. See *Random Sample*.

screening question – Questions designed to establish if the respondents have characteristics appropriate for the survey.

secondary research – The collection of marketing research data using previously published sources. Information or data available through another's research (U.S. Census Bureau; Gallup, a newspaper, etc.)

seminal research – Research never done before.

simple random (probability) sample – A method of selecting a subgroup from a population in which each member of the population has an equal chance of being selected. For example, drawing names from a hat.

situation analysis – The process of gathering and evaluating information on internal and external environments to assess a firm's current strengths, weaknesses, opportunities and threats (SWOT), and to guide its goals and objectives. It sets the table for public relations planners by detailing necessary information gathered through scientific and non-scientific research – identifying target audiences and determining the strategic direction the organization should take. Some public relations practitioners define situation analysis as a one-paragraph statement of the situation and refinement of problem definition based on research. A second paragraph identifies potential difficulties and related problems to be considered.

snowball sampling – A non-probability – nonscientific – method (especially on the Web) that relies on referrals from initial subjects to generate additional responses.

SPSS® – Statistical Package for the Social Sciences – released in its first version in the 1960s – is among the most widely used programs for statistical analysis in social science. It is also used by market researchers, health researchers, survey companies, government, education researchers and others.

stratified sampling – A form of probability sample where respondents are chosen from a random sample of homogeneous (similar) sub-groups (according to a common characteristic) where the total population has been divided. Creating a sample by sorting respondents into groups that have a common characteristic – demographics and psychographics – distinguishing them from other groups. Characteristics could include age, income, use of a product, business size or type of business.

structured research – Surveys that use a questionnaire as the basic tool.

survey research – A method of systematically probing public opinion and soliciting feedback.

systematic sample – In research, a sample drawn strictly according to a pre-determined formula – for example, every eighth, or 14th, or 24th, etc. name is chosen. This is a random approach. Computer software is now available to select scientific (chance) and other random samples.

tabulation – Organization of research data in tabular form (display of several items or records in rows and columns) showing responses to all questions – with correlations and cross references.

telephone survey – Research conducted by calling respondents by telephone and administering a survey instrument.

tracking (study) poll – A type of research study that (ideally) follows the same group of subjects – or a universe with similar demographics and psychographics – over an extended period (regular intervals) of time.

universe – In marketing research, the total group that a researcher wishes to study and measure. Also, all people who are prospects for a specific product or service. See *population*.

validity – In marketing research, obtaining the right and truthful information for the purposes of the study – the soundness and effectiveness of the survey instrument. Is the instrument measuring what it is supposed to measure? Is the sample being measured representative of the entire universe it is supposed to be reflecting?

EXERCISES

PR Challenge 4-1

Your CEO asks you to describe the difference between a random survey and a random scientific or chance survey. In 100 words or less, what would you say? Keep in mind cost, reliability and desired result.

PR Challenge 4-2

What are the advantages and disadvantages of employing intercept surveys?

PR Challenge 4-3

Are there any advantages to using omnibus surveys? How would you "sell" that concept to your CEO?

PR Challenge 4-4

Under what circumstances would you recommend *"snowball polling"* and why?

PR Challenge 4-5

If you want your focus panel to be a scientific study, how would you choose the participants?