Research Doesn't Have To Put You In The Poorhouse

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Abstract

You don't have to spend a fortune or go broke when designing and carrying out public relations research and measurement projects. To save money, consider piggyback studies, secondary analysis, quick-tab polls, internet surveys, or intercept interviews. Mail, fax and e-mail studies are good for some purposes. Or, do your own field research.

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Research has become an accepted fact of life in the public relations field. The problem is, how can you do it without going broke. Believe it or not, it is possible to do a good deal of research without ending up in the poorhouse.

To begin, let's define our terms. In our view, to those who are public relations practitioners, research has to be regarded as the *basic* tool for fact and opinion gathering. It is a *systematic* effort aimed at discovering or confirming, through *objective* investigation, the facts or opinions pertaining to a *specified problem or problems.*

First, to save money, don't do research if you really don't need it, or, more important, aren't going to use the findings in some meaningful, constructive way. Too often, public relations professionals spend a small fortune on research and end up with a pretty report that gets placed on a bookshelf somewhere, never to be referred to again. Don't buy, commission or carry out research on your own, unless you can apply the results in a useful manner. Make your research action-oriented.

Second, don't ask a researcher to do your thinking for you. Conduct serious thinking of your own about what you ought to be doing and why. You're inviting economic trouble for yourself if you contact an outside research consultant with only broad gauge questions, such as, "Tell me what I should do?" Research consultants are in business like everyone else, to make money.

Think through some options of your own before seeking professional advice. Specifically, determine precisely what it is you want the research to do for you and how the results are to be used. This will determine if a descriptive survey is good enough, or of explanations of particular opinions, attitude and behavior patterns also are needed.

It is important that you call the shots on the research that is needed. If you remain in control, you're bound to be in a better position to keep costs in line.

Third, don't automatically jump into custom-tailored research; that is, commissioning a study designed and carried out exclusively for you and your organization. Custom research is almost always the most expensive. Sometimes you cannot avoid a custom-tailored study. Sometimes it is necessary to take an in-depth look at a special audience regarding your organization's particular image or major issues that may necessitate action. But keep in mind that these custom projects are the ones that carry price-tags in the $20,000 to $100,000 and more range.

Following are seven suggestions on how to carry out effective research with only a modest expenditure of funds:

1. **Secondary Analysis**

Secondary analysis is the process of re-examining already existing survey research data from a new and different perspective. It is a research technique which, in the words of noted sociologist Herbert Hyman, seeks to extract from previously conducted opinion studies "new knowledge on topics other than those which were the focus of the original surveys." Some people jokingly refer to secondary analysis as "surveying the surveys."

In understanding secondary analysis, two words take on key importance -- systematic and analytic. To be meaningful, secondary analysis needs to be both. Systematic refers to the step-by-step building of data by progressing from one reference source to another, the culling out of pertinent information from each source, and the use of each as a lead to new, more detailed references. This is not a haphazard operation, but one requiring someone experienced in the availability of data references and techniques of information retrieval.

The word analytic is, perhaps, even more important, since this is the area where the actual concept of secondary analysis is often misunderstood. While some secondary analysis research projects are designed specifically as overview studies to develop descriptive or qualitative industry data, the most useful probes are undertaken to analyze specific communication problems and issues. In those instances, the research must be designed to provide data which are both quantifiable and projectable.

With the growing wealth of data on the internet and in printed source books and periodicals, there are literally hundreds upon hundreds of places to which you can go to obtain relevant secondary data. A logical starting point is academic, trade and professional journals. The federal government also is a rich source of information: the Census Bureau and the Departments of Commerce, Defense, Education and Labor, to mention just a few.

Web site addresses are constantly changing, but some of the best sources of already available data include sites such as these: the U.S. Census Bureau (www.census.gov) … *American Demographics* (www.marketingtools.com) … the Association for Education in Journalism and Mass Communication (www.aejmc.sc.edu) … the Institute for Public Relations (www.instituteforpr.com) … the Public Relations Society of America (www.prsa.org) … the National Opinion Research Center at the University of Chicago (www.norc.uchicago.edu) … the National Center for Health Statistics (www.cdc.gov/nchs/default.htm) … the Pew Research Center for the People & The Press (www.people-press.org) … the Roper Center for Public Opinion Research (www.ropercenter.uconn.edu) … the Survey Research Laboratory at the University of Illinois (www.srl.uic.edu) … and the site maintained by Survey Sampling, Inc. (www.worldopinion.com).

The U.S. Commerce Department's 1,000-page reference book -- *Statistical Abstract of the United States* -- is a must for obtaining secondary data, as are such periodicals as *Research Alert*, a bi-weekly newsletter that summarizes public opinion polls relating to business and commercial interests, available from E.P.M. Communications in New York City (www.epmcom.com) … *The Public Perspective,* a bi-monthly magazine that summarizes recent public opinion polls, available from the Roper Center for Public Opinion Research at the

University of Connecticut (www.ropercenter.uconn.edu) … *The Polling Report*, a twice-a-month newsletter that summarizes recent public opinion polls relating to politics and public policy issues, available from the Polling Report, Inc. in Washington, D.C. (www.pollingreport.com) … *Quirk's Marketing Research Review*, a monthly magazine available from Quirk Enterprises Inc. in Bloomington, MN (www.quirks.com) … and *Survey Research*, a quarterly newsletter that summarizes public opinion studies carried out by academicians and those in the non-profit sector, available from the Survey Research Laboratory at the University of Illinois (www.srl.uic.edu).

The beauty of secondary analysis is that it's quick and inexpensive since you're eliminating the field work. Conducting a search of literature and secondary analysis of already available research data can be useful alternatives to original expensive research. If nothing else, it will help you to avoid re-inventing the wheel.

2. <u>Piggyback or Omnibus Studies</u>

Another research approach that may warrant your attention, if you are interested in saving money, is what is often informally referred to as a "piggyback" study, but more formally known as an omnibus survey.

Omnibus surveys are "all-purpose" national consumer polls usually conducted on a regular schedule -- once or several times a week -- by major market research firms. Organizations are encouraged to buy -- or "piggyback" -- one or several proprietary questions and have them "added" to the basic questionnaire. Those who decide to "piggyback" questions of their own are usually charged on the number of questions asked.

Here's how it works: The market research firm that conducts the survey schedules a particular day of the week for the field work, draws a sample of potential respondents (usually a representative sample of the adult population of the United States), and then invites interested organizations to add one, two, three or possibly four or five questions of their own choosing to the survey instrument.

Most omnibus surveys utilize a questionnaire averaging between 20 and 25 minutes in length, with anywhere from three to seven organizations "piggybacking" proprietary questions of their own onto the survey instrument.

Omnibus services are usually priced on a per-question basis -- that is, you pay only for the specific questions you wish to have asked. In the U.S., most suppliers have rates that start at $725 for the first closed-ended question, and decrease to as little as $525 for the fifth question asked. Thus, you could easily ask three closed-ended questions for less than $3,000 in all. An open-ended or free response question is usually more expensive, often between $1,000 and $1,200 per question.

Many omnibus polls are conducted by telephone, with results available within a period of from three to four days from the start of the field work. In recent years, however, an increasing number of market research firms have been conducting omnibus polls on the internet, resulting in far quicker turnaround times of two days or less.

One of the benefits of participating in an omnibus is you pay only for the proprietary questions you ask; you do not pay for any of the demographic background questions that also are asked in the poll. Most research suppliers automatically ask respondents questions pertaining to their gender, their age, their income levels, where they reside, etc. There is no charge for those extra questions and, usually, the responses to the proprietary questions are cross-tabbed against these attribute questions.

Omnibus research services are ideally suited for research for publicity purposes or where an in-depth look at an issue is not required.

They also have been useful to public relations professionals as a means of testing which spokespersons are most or least credible, in determining how familiar or unfamiliar those in the general public are with selected issues, and for pre-testing ideas or themes that are planned for possible inclusion in a new PR program or campaign.

There are an extensive number of research organizations in the U.S. and elsewhere in the world that offer consumer omnibus studies. Listings are available in directories, such as the *Greenbook*, published by the American Marketing Association/New York, Lakewood Business Park, Suite E-11, 4301 32nd Street West, Bradenton, FL 34205. Phone: 1-800-792-9202. Web address: www.greenbook.org.

3. Quick-Tab Polls

A third economical research approach is the quick-tab poll.

This method involves interviews with only a small number of respondents -- usually between 100 and 250 -- and involves asking only a limited number of simple, closed-ended questions, either via telephone, or the internet.

Such polls are ideal to measure consumer reaction in a hurry in a particular region or city.

For example: What if your organization suddenly and unexpectedly has been featured negatively on a local radio or television talk show? How should your organization respond? Should it reply to the criticism, ignore it, or what? Usually, you are not only in a time-bind, but also in a budget crunch. How do you deal with the problem?

A solution is to prepare a very short, closed-ended questionnaire of no more than six or eight questions to determine if anyone saw or heard the references to your organization on the air, if they can specifically recall what was said and what their reaction was to the broadcast.

You can carry out the field work yourself by selecting phone numbers at random from the residential section of your local telephone directory or engage the services of a research supplier to conduct a small number of interviews for you via telephone or the internet.

Because the number of questions being asked is limited, data analysis also has to be limited. Because the sample size is small, the statistical margin of error in such a poll has to be correspondingly high -- perhaps 8 to 10 percentage points in either direction at the 95 percent confidence level.

Yet, if the survey tells you that 70 percent of the people you poll did not watch the show and did not catch the negative comments about your organization, that's all you really need to know. So what if in the overall population the actual number of non-watchers was really between 60 and 80 percent; the important thing for you is that a large portion of the population did not see the show and you now have useful information for planning purposes.

4. Sponsor or Client-Fielded Research

Still another way to do research inexpensively is through sponsor or client-fielded research.

Hire someone who is specialized in survey research techniques and methodologies (perhaps a college marketing or social science professor or a freelancer) to design your study and perhaps to help prepare the questionnaire. Then, carry out your own field work, using members of your staff or volunteers. After the interviews have been completed, turn the completed interview forms back to the research specialist for data tabulation and analysis. The procedure can result in considerable cost savings, since you, the sponsor of the study, are fielding your own research.

This was the path taken several years ago by a non-profit community services organization with more than 50,000 members in one state. The organization was interested in surveying a sample of its members, but lacked the funds to retain a full-service polling firm to carry out the study.

Instead, the organization hired a freelancer with expertise in survey research. That individual 1) prepared a research and sample design, based on the organization's known membership distribution in that state … 2) prepared a primarily forced-choice 5-minute questionnaire for use in face-to-face interviews with members … and 3) wrote a detailed set of respondent screener requirements and interviewer instructions as a guide for "volunteers" to use when contacting members for possible interviews.

The organization then recruited "volunteer" interviewers from among its membership base to conduct the interviews at local meetings of the organization throughout the state. In all, a representative sample of 1,500 members -- based on pre-established quotas -- were surveyed. The questionnaire forms were turned over to the freelancer, who then tabulated and analyzed the results and prepared a short top-line report of the findings.

Total cost to the organization for set-up, questionnaire construction, interviewer training, data tabulation and analysis: less than $5,000.

5. Intercept Studies

Relying on a carefully selected probability sample is usually the best approach to follow when fielding a study. But, if you don't have to be that precise and would like to save money, intercept studies are a viable alternative.

As the name implies, with this type of research you intercept people you happen to come across in a particular setting, stop them, and ask a number of survey questions. Some people refer to this as a man-in-the-street poll. Rather than using pure randomness in the selection process, this technique often relies on quota sampling. You may know that in a given neighborhood or community, one-third of all residents represent a particular racial or ethnic group. So, when intercepting potential respondents passing by, make certain that a minimum of one-third are members of the sub-group you feel it is important to reach.

Intercept studies can be useful for conducting research quickly, efficiently and economically when statistical precision is not crucial. For example, your organization may plan to run an advertising campaign in the local press during the coming weeks. Before you lock up the ads and send them off to the printer, you might like quick, informal general public reaction. Select a busy street corner in your neighborhood or community or a frequently visited park and send staff members into the field on a pre-determined day to obtain reactions to the ads of carefully selected passersby. Are they readable, are they believable, and how much drawing power and appeal do they have?

If you do a good job in picking the right location and the right time of day, you can be reasonably certain of getting a good sample. Keep in mind the obvious biases in such a research approach. Doing a lot of interviewing in the daytime may result in contacting lots of those who are unemployed or retired. Interviewing in the evening may miss commuters and result in over-sampling young people.

If you want to know what college students are thinking, certainly one feasible way to do it is through selected interviewing near a college campus. If you want to know the views of grocery shoppers, conduct interviews near food stores.

Lots of intercept interviews are done in indoor shopping centers or malls, in hotel lobbies, at airports, and at trade shows or conferences. However, keep in mind that malls and hotels are private property and that permission ought always to be sought before attempting to conduct field work in any of those locations. In some of the larger shopping centers in the United States, market research firms have been given exclusive contracts to conduct intercept interviews at that facility and the only way to carry out a project is to retain the services of those firms. Trade shows and conferences are also great locations for intercepts, but again, permission needs to be obtained before any interviewing on premises is attempted.

6. Internet Polls

It's unbelievably easy, fast and inexpensive these days to conduct survey research on the internet. And, you can even create and conduct the surveys yourself, without having to install special software.

But, are such studies valid? In some instances -- if you are polling a specific audience you know something about and can control the sample selection process -- then, they can be valid. But, in other instances, if you are polling the general population and anyone who wants to participate can, and there are no controls -- then, more often than not -- such polls may not be valid or reliable. The principal reason is that most on-line polls rely on self-selected samples and thus are not drawn at random.

A number of research suppliers are now offering low cost do-it-yourself surveys on-line. Most function in a similar fashion: If you are interested in conducting your own surveys, once you log-on to a given site, you are provided with a selection of survey templates you can use to build your own on-line questionnaires.

Once you have selected a template, you can customize it, including editing and changing question wording, often redesigning the background and the color schemes. Most of the services allow you to designate who you would like to poll. If it's your own employees or customers, you can give the on-line polling service their e-mail addresses. If you are targeting a specific audience segment, some services can provide you with lists, broken down by age, gender and geographic location.

Some of the services permit you to launch the survey on your own with a personal greeting. And, almost all of them -- once the completed questionnaire forms have been collected -- allow you to review, on-line, the top-line results displayed in colorful charts, graphs and tables. Using these services, you can poll anywhere from several dozen to several thousand individuals in a matter of a day or two.

Three organizations that offer quick, relatively inexpensive, do-it-yourself on-line polls are InsightExpress, an affiliate of NFO Worldwide, Inc. (www.insightexpress.com) … Zoomerang, a division of Market Tools (www.zoomerang.com) … and Informative, Inc., which offers a do-it-yourself service called SurveyBuilder (www.informative.com).

Costs vary. Some on-line polling services charge flat fees, ranging from several hundred dollars to $1,000. Others charge based on the number of respondents (e.g. $1 for each completed interview.)

7. Mail, Fax and E-Mail Surveys

Mail, fax and e-mail surveys, if properly done, can be highly reliable, cost-effective and statistically valid research tools.

One reason these self-administered questionnaire studies are so popular is that they are a form of opinion research any organization can carry out on its own. The main problem with mail, fax, and e-mail surveys is that often response rates are quite low, raising questions about the reliability and validity of the data collected.

What's a good response rate? Many PR pros seem pleased when they receive back 10%-to-15% of the questionnaires they have distributed via mail, fax or e-mail, but that's not a good return. To obtain a valid reading of public opinion in a mail, fax or e-mail poll, response rates ought to be in the 40%-to-60% range. A common sense rule of thumb: If you hear back from less than half of those you have contacted, you need to find out something about those you have not heard from -- Who are they? Are their views different from those who have responded? -- before you can put much credence in your data.

How do you achieve a good response rate? First thing is to put yourself in the shoes of the individuals you are contacting. Ask yourself: if you were one of those individuals, how likely would you be to fill out and return the questionnaire form? How interesting and relevant are the questions you are asking? How difficult are you making it for those potential respondents to answer your questions? Is the questionnaire form easy to follow? Are you asking too many open-ended, free response questions that require potential respondents to write lengthy replies to questions, or have you given the individuals lots of easy, short, multiple-choice questions to answer?

When conducting a mail survey, have you included a postage-paid, self-addressed return envelope so the potential respondents can easily mail the form back to you? When conducting a fax or e-mail poll, have you given potential respondents appropriate return fax numbers or e-mail addresses? Have you offered an incentive or a special reason for responding to your survey, such as a gift, money, or perhaps a copy of the survey findings? Keep in mind, most potential mail, fax and e-mail survey respondents when they are asked to participate in a poll often ask themselves questions like these: What's in it for me? How do I benefit by filling out the form and returning it?

Knowing something about your respondents is crucial to a high response rate. Researchers have found that the more committed, loyal and homogeneous the target audience, the higher the response rate to a mail, fax or e-mail survey. The less committed and loyal, and the more heterogeneous, the lower the response rate. Since employees, shareholders, college alumni, customers, and members of a professional society or association usually have some commitment to a given organization, these are the types of audience groups that can appropriately and effectively be surveyed by mail, fax and e-mail. However, surveying the general public using those methodologies more often than not results in a poor response rate.

When conducting surveys by mail, response rates are usually poor if there is only one mailing to potential respondents. Three waves of mailing are much more effective.

As part of the *first mailing,* include a short cover letter explaining the purpose of the research … the questionnaire … and a postage-paid, self-addressed return envelope. Consider including a separate postage-paid, self-addressed return postcard that asks respondents to identify themselves. By having respondents mail the identity card and the questionnaire back separately, you have a record of respondent participation, while protecting the confidentiality of their responses.

Most researchers recommend that a *second mailing* take place precisely one week after the initial mailing. This should be in the form of a reminder postcard that thanks those who have already returned their questionnaires for doing so, and urges those who have not to do so as soon as possible. The reminder postcard is vitally important in achieving a high response rate.

A *third mailing* is sometimes not needed, but often can make the difference between a high and low response rate. Generally, it should be sent out two weeks after the reminder postcard. It should contain a second cover letter … a duplicate copy of the questionnaire form (on different colored paper) … and a second, postage-paid, self-addressed return envelope. This third mailing should only go to those who have not, at that point in time, returned their questionnaire forms. The three-wave mailing approach often results in response rates of 50% or higher.

Follow-up reminders are also a good idea if you would like to obtain high response rates to fax and e-mail surveys.

Often, to achieve a high return, researchers insert a dollar bill as part of the mailing, as a "reward" for participating. Sometimes, a better approach is to stage a mini lottery. Inform potential respondents that those who fill out and return their questionnaire forms will have a chance to win one big prize, which will be awarded to one of the participants.

Offering $1 each to 1,000 potential respondents will cost you $1,000, but might not result in as high a response rate as might be offering $1,000 to one of the survey participants. The cost to you is the same; the reward to the potential winner is perceived as far more attractive than simply giving a token one dollar bill.

Don A. Dillman, author of the popular text, *Mail and Internet Surveys: The Tailored Design Method* (New York: John Wiley & Sons, 2000), suggests these three conditions for a high mail, fax and e-mail response rate: "Minimize the costs for responding … maximize the rewards for doing so … and establish trust that those rewards will be delivered."