



THE UNIVERSAL ACCREDITATION BOARD ACCREDITATION STUDY COURSE

RESEARCH METHODS

Session **5**

Overview

This session of the Accreditation Study Course is designed to continue the study of research methods used in public relations planning and to touch on communications audits. It assumes candidates have completed Session Four, Research 1, or the full-day preliminary workshop.

► **Reading to be assigned BEFORE this session**

- Research
 - > How to determine facts/data about an organization or situation
 - > Informal and formal methods
 - > Primary and secondary research
 - > Use of research in planning
 - > Use of research in evaluation
- Segments 5.6 and 5.7, Detailed list of Knowledge, Skills and Abilities tested, Candidate's Preparation Guide for the Examination for Accreditation in Public Relations.

Special Note for Coach

If you have not been coaching recently, please review these preliminary materials: For You, the Coach; The Coaching Method; Managing the Class; About House Rules. Before the day of the class, make sure you are familiar with the content in the reading which candidates should have done, and with the exercises you are going to conduct in this session. Consider any adjustments you may need to make if this is a free-standing unit, or is part of a sequence of preparation classes.

► **Significance of Subject Matter**

- Research, planning and related functions in Section 5 of the KSAs are weighted at 30 percent of the multiple-choice Examination.

► **Handouts for this session**

- Content Analysis – Handout #15
 - Table for Determining Random Sample Size – Handout #16
 - Sample Size and Accuracy – Handout #17
 - Survey Research – Handout #18
 - Survey Research – Tips for Do-It-Yourselfers – Handout #19
-

Handouts continued

- Focus Group Research – Handout #20
- Scientific Method – Handout #21
- Calisthenics #5: Research Methods – Handout #22

Visual Aids needed for this session

- ▶ 384 (“magic number”) – Visual #9

New lecture material to be delivered during this session

- ▶ Methods and Uses of Research

I. Agenda for Session*Instructions: Coach reviews information**1 minute*

- ▶ Research and Research Methods

II. Review Research*Instructions: Coach reviews information**15 minutes*

- ▶ **Ask:** When you undertake research, what's the most important thing?
 - > Desired answer: the problem statement
 - > What should it include? Six W's and one H:
- ▶ **Probe for:**
 - > **What's** happening now?
 - > **What** the source of concern is
 - > **Where** it is of concern
 - > **When** it is a concern
 - > **Who** it involves or affects
 - > **How** it involves or affects them, and
 - > **Why** it concerns the organization and its publics.¹
- ▶ **Ask** candidates to make notes:
 - > Give me ONE characteristic of:
 - formal research
 - informal
 - primary
 - secondary
 - > Give me TWO examples of each type of research, reflecting the characteristic.
- ▶ **Call for** responses as usual.

III. Going Further: Research Methods*Instructions: Coach presents material**5-10 minutes*

NOTE TO COACH: From the previous work on research and sharing of candidates' experience, you should have an idea of the existing background in the class. Adjust the following material as appropriate, announcing it as a means to:

- broaden or reinforce their background
- highlight the elements they need to have at their fingertips

- **Presentation by Coach:** We will be looking at research methods primarily as users of research, not necessarily as designers and doers. This is especially true of formal scientific research. You very likely now find yourself – or you will find yourself – doing informal research and analysis of situations. You might design and carry out bits of “dipstick” survey research – checking on the level of awareness or understanding in an audience. If you undertake substantial scientific surveys, you probably will contract for the study, with an outside firm or possibly with in-house statisticians.

Focus group research is another story: You may be expected to do focus groups yourself; or you may contract for it. We will take up some of the principles and procedures you should know to do well and stay out of trouble, at least for the purposes of this Examination. In actual practice, don't hesitate to review your texts, find other texts, call on the PRSA reference library, and consult with persons who work with research on a regular basis. The primary research text on the bookshelf for study for accreditation is *Primer of Public Relations Research*, by Don W. Stacks. This will be a good addition to your personal library. Except where other sources are cited, the authority for much of the material in this session is Henry Milam, Ph.D., APR, who taught research and other aspects of public relations at Drake University in Des Moines, Iowa, and had a private practice in public relations research.

- You most need to know:
- > Likely options among various types of research
 - Content analysis
 - Surveys
 - Focus groups
 - Public relations audits and communications audits
 - > The procedures for good research and reliable results
 - > How to report research results

► **Content analysis**

Allow 15 minutes

- > Think back to the automobile episode you may have worked on in an earlier session, starting to consider publics or audiences.
- > Recapping the episode: You are working for an automaker in this country when *Consumer Reports*² rates your sports utility vehicle “Not acceptable” because of its “pronounced tendency to roll over in our emergency handling tests.”

- > It is probably fair to say that the *Consumer Reports* action got a lot of press and broadcast coverage.
 - If you were working for the automaker, you might well have wanted to do a content analysis of the coverage. What's a content analysis?
 - ◆ The objective, systematic, quantitative description of the content of documents, including print media and broadcast media coverage.
- > What are your options?
 - Simply to describe the contents of the messages.
 - ◆ Compare media, such as television with newspapers, or letters to the editor with Internet discussion.
 - Study trends or changes in content in a medium over time.
 - Analyze international differences in communication content.
- > Contents: In analyzing the contents, you may want to define categories such as
 - Direction – is the coverage pro, con or neutral?
 - ◆ Thrust – is it aimed toward the automaker, Consumers Union, regulatory authorities, auto owners . . . ?
 - ◆ Values – is there evidence of values, such as public safety, consumer protection, quality workmanship . . . ?
 - Themes – such as prejudice or stereotypes.
- > Method
 - In many instances, you will want to look at everything written about your company or product.
 - In this case, the stacks of clippings might be monumental. If you have broadcast tapes from more than the networks, screening them could be tedious and time-consuming.
- > Sampling is a reasonable approach.
 - How many to sample? Apply the criteria for survey sampling (coming later in this session) and consider the variability of the items in your universe.
- > Now you move into coding and verifying. Further details are given in the hand-out on content analysis.
 - A resource
 - ◆ The research text on the bookshelf for accreditation has a fine discussion of content analysis in Chapter 7. The text is *Primer of Public Relations Research* by Don Stacks. It goes beyond coding into mathematics which may not concern you, but the narrative on procedure is very informative.
 - ◆ If you are the auto person, you surely would outsource the content analysis, but you just as surely would personally supervise the selection of categories for analysis and satisfy yourself on procedure.

▶ **Surveys (sampling)***Allow 30 minutes*

NOTE TO COACH: Conduct this portion as open discussion, raising questions and taking brief answers from whomever is ready. Don't digress into planning; at this point we are after the numbers for sampling.

- > Staying with the automaker for the moment: Would you see a need for surveying one of your audiences, either immediately or in the future?
 - Take a few responses in general discussion; this is not an exercise.
 - Get a short list: dealers, your utility vehicle owners, all auto owners . . .
- > Let's just deal with numbers, not wisdom or choice of medium (telephone or mail).
- > Take dealers. There are about 25,000 auto dealers in the country.³ Say 3,000 or 4,000 handle this line. That's a guess.
 - Do you need to survey all of them? Will a sample be sufficient?
 - How large does the sample need to be? How many dealers do you need to contact? (Responses should give an indication of whether candidates have been studying or not.)
- > Answer to above question: It depends on how accurate you wish to be.
 - One consideration is the **margin of error**.
 - ◆ Do you need to be 100% sure of your answers, or is 90% good enough? Or 80%?
 - ◆ Most scientific surveys aim at a margin of error of plus or minus 5%.
 - That is, the answers you get may be five percentage points above or below the actual figure you would get if you surveyed everyone and everyone answered, or if you were to repeat the survey using a sampling method.
 - ◆ Most scientific surveys aim at a “reasonable” **confidence level** of 95%.
 - That is to say, if you did the same survey with the same audience 100 times, in 95 of them the results would be similar to what you got.
 - No one ever replicates a survey 100 times to prove this.
 - The science of statistics can calculate these things.
 - ◆ Notice that these are **two separate items**: margin of error and confidence level. Both relate to reliability.
- > **Hand out** the Table for Determining Random Sample Size from a Given Population. (*Give Class Handout #16*)
 - Allow a few minutes to read the notes.
- > Returning to the Automobile dealers: how many dealers do you need to contact, out of 3,000 or 4,000?
 - Note that there is little difference – 341 or 351. It's not proportional; it comes from formulas in statistics (which you do not need to know).
- > Suppose you wanted to survey all automobile owners for their opinion of the automaker now. There are some 80 million households with at least one car.⁴ How large does your sample need to be?

VISUAL #9: 384

- > You have now reached the magic number of 384. That's worth remembering.
 - **Reiterate:** A sample of 384 is sufficient for most populations, IF it is properly drawn to be a random sample, and IF you want to measure the population overall, not subgroups. You will find this figure on page 167 of the Stacks research text, and in many other sources.
- > HOWEVER, you might want to know whether the automobile dealers on the East Coast differ from those on the West Coast, or in the Midwest. Now how many do you need?
 - **Refer** to the notes on the handout. Don't try to be precise; it will be somewhere between 384 and 1800, depending on breakouts. Statisticians settle such questions when the need arises. You just need to know what breakouts to ask them for.
- > **Quick drill** from real life: A health system active in seven communities wanted to test name recognition; it commissioned 100 telephone surveys in each of the seven communities. Was this an adequate sample? Oversampling? Undersampling?
 - **Answer:** For name recognition throughout the area, compare 700 to 384. For data about name recognition in each community, the considerations change. Is this similar to the Congressional District breakout on your sample-size chart? Or are the communities widely separated geographically, and too dissimilar to be treated as part of a whole? At one extreme, you might need 384 interviews in each of the seven. It's time to consult the statistician and the accountant, and start balancing the cost of telephone interviews against the degree of accuracy needed.
- > **Take up** the matter of "random sample."
- > **Ask:** We have been discussing random samples. Does someone have a definition at his or her fingertips?
 - Take responses.
 - **Emphasize** the key point: The sample must be drawn so that everyone within the target population (or universe) has an equal chance to be selected.
 - ◆ Survey firms have computer-generated tables to do this
 - ◆ Textbooks have tables of random numbers, which you can use if you must be precise
 - ◆ You can work by hand, if needed, approximating a random sample
 - Use your own lists, such as employees or customers, or outside lists such as directories or voter lists.
 - Plan to use every tenth name, or every third name, or what is needed to get the correct number (plus some extra for good measure).
 - Determine the starting point by some random method (roll the dice, throw a dart, pick a number from a bowl, etc.).
 - Count through the list, selecting those you hit at the determined interval.
 - **Conclude** by re-emphasizing the random aspect.
 - ◆ If you want your survey to accurately represent income brackets, age groups, geographic regions or other subunits, you will need a random sample drawn from within each subunit. That's called a stratified random sample.

- > Frequently asked questions:
 - If you mail out a larger number and get 384 back, is that valid?
Answer: Not equally valid. The 384 have selected themselves. They were not chosen at random. The number is large enough to be useful, but the results cannot be projected to the entire population with the same degree of confidence. If you repeated the process, you might get an entirely different 384 back, with very different results.
 - How large a response should you get from a mail survey in order to rely on it?
Answer: Depends.
 - ◆ If you are dealing with numbers, consider whether the non-repliers could reverse the results. If your response was positive, but the non-repliers were all negative, how much difference would it make?
 - ◆ If you are dealing with qualitative matters such as preferences or “how to” questions, a less-than-perfect response may be indicative and sufficient.
 - ◆ Sometimes you can assume that persons most actively interested in your question responded.

► **Surveys (types)**

Allow 3-5 minutes

Historically, surveyers considered doing interviews in person, by mail or by telephone. The electronic age has added e-mail, facsimile and Web site surveys to the toolbox. These are all worth thinking about. So are the various forms of computer-assisted interviewing or touch-tone telephone response. You will need to weigh the advantages and disadvantages carefully, in light of your purpose and your universe.

- > *A few questions:*
 - Can you be sure the person who is addressed is the person who is responding?
 - How dependable is your list of e-mail or fax addresses, or telephone numbers?
 - Can you reach enough of your desired audience by this means?
 - Is confidentiality or anonymity important, for respondents?
 - Is password protection sufficient to avoid duplication on a Web survey?
 - Will your data be projectible to your target population? Does that matter?
 - Where a keyboard or touchtone pad is involved, how much must you allow for error in striking the wrong key and giving an unintended response?
- > This is a good place to allot some time with the textbooks and people who do surveying for a living. All the thinking time you put in before you construct or commission a survey will be well spent.

In recent years, graduate students who undertake electronic surveys frequently use a software package which immediately calculates the input and permits respondents to see the cumulative result to date. This can be an incentive. For professional use, depending on the nature of your survey, there could be a hazard of premature disclosure of trends and results. Again, thinking time is a good idea.

So is process. The standard instructions for improving response rate apply to electronic methods. Response rate improves with advance notice, emphasis on importance and benefit, and follow-up. Applying the tried-and-true process to new technology will give you results in which you can have more confidence.

► **Surveys (construction)**

Allow 5 minutes

- > Generally speaking, writing survey questions and structuring a survey for the order of questions is a job for experts.
 - You should work closely with your survey firm to develop questions that ask what you want to know. This is a critical step: If the questions are not carefully worded, the results will not be of any benefit to you.
 - It usually is important to sound out management and colleagues regarding elements they hope to see in a survey, and settle any questions ahead of time. It is also a good idea to conduct a focus group consisting of people who are from your target population to get a better understanding of how the questions should be worded. This is an example of using “triangulation” in developing your research. (If this term is not familiar to you, you are due for a little textbook time.)
 - ◆ This cuts down on second-guessing after the results are in.
 - Time spent in working out topics and refining questions for specific meaning, before the survey is administered, is well spent. Very well spent.
 - Standard rule: Do not seek information unless you really have a use for it.
 - ◆ There is always a strong temptation to ask about things you just “want to know.”
 - ◆ Length of the survey has a direct effect on the response.
 - People will terminate, by mail or by phone, if it is too long.
 - ALWAYS make sure that a survey is pretested with the target audience. If you have several segments, test with each segment. This cannot be emphasized enough! Even if you had focus groups as background, you need to see how well the questions are understood with a “cold” audience.
 - ALWAYS arrange for the experts to translate results for you and your management.
 - ◆ Your experts should be able to single out the significant responses for your situation.
 - ◆ They should spot “socially acceptable” answers which diverge from the truth.
 - People will misstate such things as frequency of voting.
 - People sometimes overstate income and other status items.
- > Tips for do-it-yourselfers and further details about survey construction are given in the handout on Survey Research.

► Surveys – Reporting results*Allow 10 minutes*

- > In the commercial world, you frequently see results of surveys showing only the percentage of positive or negative response, or “four of five doctors say . . .”
 - You never know whether there was a total of five doctors, or 500, or 5000.
 - This borders on being misleading, and is insufficient for responsible reporting.
- > Ethical reporting of survey results calls for a version of full disclosure.
- > You may present your conclusions and findings in your own words and comparisons.
- > The pertinent information to establish reliability of the survey should come early.
 - “The scientific survey is applicable to the city of . . .”
 - “Persons interviewed were a scientific sample of all hourly employees . . .”
 - ◆ “Of 1000 surveys mailed out, 675 were returned and tabulated, a response rate of more than two-thirds or 67%. This is considered a very high response for this kind of survey. . .”
- > Follow this up with more detailed facts:
 - Dates when interviews were conducted (usually the period between two dates).
 - Number of interviews and type: telephone, mail, on-line or in-person.
 - Type of sample (random, stratified random, selected from a target group).
 - Margin of error and confidence level.
 - ◆ If the survey was a mailout, the number mailed out and the number and percentage returned.
 - ◆ If you are reporting results of specific questions, repeat the question or questions verbatim as presented in the survey.
 - ◆ In a newspaper or magazine, this portion is often treated as an endnote, in smaller type.
 - Notice how news media handle this information for major national polls.
- > It is not uncommon for management or department heads to object to publishing the response rate if it was small. They may want to draw positive inferences from the result and ignore the numbers.
 - **Ask class:** Have you ever encountered this attitude? How did you handle it?
 - **Additional suggestions:**
 - ◆ You can argue that this will affect the credibility of the company.
 - Competitors and savvy analysts will notice the omission.
 - ◆ The figures may be discredited, leaving the company in a bad position.
 - ◆ Ethically, you (the public relations person) are bound to give the facts.
 - ◆ Find comparisons to put the response rate into perspective.

► Focus group research*Allow 15-20 minutes*

NOTE TO COACH: Lead off this portion by asking how many in your class have

- participated in focus groups
- conducted them
- used them in the course of their work

Modify your presentation of this section accordingly. Make sure to emphasize that focus group research is

- valuable for understanding
- qualitative only
- not scientific
- not projectible to the entire population

Many people who use focus groups are under false impressions about their reliability.

- > This observation technique has become quite popular for marketing and public relations research.
- > The groups are focused discussions led by a moderator and involving six to 12 participants.
- > This is qualitative research only.
 - It is a snapshot of a small portion of an audience. Very small
 - It cannot be relied upon as representative of the entire audience or population.
 - It is excellent for obtaining the color and flavor you can't get in formal surveys.
 - It provides depth to what people within the target population think or feel about issues and topics.
- > Focus groups are valuable and often sufficient in themselves:
 - To test marketing assumptions regarding the emotional responses people are likely to make to a given product or concept.
 - To pre-test creative ideas or to seek creative ideas with which to express product, service or idea benefits.
- > Uses in connection with formal surveys:
 - Before designing the survey, focus groups can expand our understanding of what is to be surveyed and help to identify the language to be used in asking the survey questions.
 - When the survey results are in, focus groups can explore, in depth, problems and/or opportunities that may be observed in the analysis of surveys. They may give insight in why people answered questions the way they did, or amplify the meaning of comments.
- > Devices to make focus groups better indicators:
 - Replicate in the same setting.
 - ◆ Usually at least two focus groups are conducted, and results compared.
 - Replicate in different settings.
 - ◆ For national or international undertakings, conduct groups in various locations.
 - ◆ The same approach applies to statewide efforts, or large urban areas.

- Some facilitators use a short paper survey in the focus groups, at beginning or end, to provide data which can be compared with observations or with data from other regions.
- Structure the interview and use the same sequence in all groups. This is very important to do; otherwise you cannot compare how the different focus groups responded to the questions during the interview.
- > A common question: Who should conduct the groups? In-house or outside moderator?
 - Categorically, outside moderators are recommended for groups within an organization.
 - ◆ Participants from within an organization are likely to talk more freely with someone from outside the organization, especially if they have criticisms.
 - ◆ If participants' individual responses are to be held confidential, they are more likely to believe an outside facilitator can maintain confidentiality.
 - ◆ In-house moderators are more likely to be tempted to respond defensively to criticism, or explain the company's position rather than listening to the group.
 - Companies frequently send their own staff into new markets to explore attitudes about new products or services by conducting focus groups.
 - ◆ They may be better able to see how comments in the groups relate to company concerns and interests.
 - ◆ On such assignments, company staff may observe groups conducted by local facilitators who are better acquainted with local customs, culture and language.
 - Size of focus groups: Most authorities cite a range for the number of participants. They vary. The range generally will be somewhere between six and twelve persons. Many like 8-11. Fewer than six, the discussion is not good enough. More than 12, you have a round table.
- > More detailed comments are available on the Focus Group Research handout and in the research text.
 - **Announce a resource:** A very good resource booklet and an equally useful paper are available for download, free, on the Web site of the Commission on PR Measurement and Evaluation: www.instituteforpr.com.
On the home page, click on Commission on Measurement and Evaluation
Look for:
“Public Relations Research For Planning and Evaluation”
“Research Doesn’t Have To Put You In The Poorhouse”
 - These resources are written by Walter Lindenmann, who until recent years was the research expert for Ketchum Public Relations, a major international firm.

► **A quick look at audits**

Allow 5 minutes

- > A public relations audit “involves a comprehensive study of the public relations position of an organization: how it stands in the opinion of its various publics.” The language is from the Carl Byoir firm, one of the pioneers of public relations auditing.⁵
 - Baskin, Aronoff and Lattimore⁶ identify four general categories of audits in this function:
 - ◆ Identifying relevant publics such as stockholders and employees; also social action groups which affect the organization
 - ◆ Determining the organization’s standing with its publics, possibly through content analysis or other research
 - ◆ Determining issues of concern to the various publics
 - ◆ Assessing the power of the publics, considering their size, funding, economic effect, regulatory authority or other impact
 - The process can be described in four steps:
 - 1) Finding out what “we” think – interviews with key management to determine company strengths and weaknesses, publics, issues and topics to be explored
 - 2) Finding out what “they” think – research with the key publics to determine how closely their views match those of company management
 - 3) Evaluating the disparity – analyzing the differences between what “we” and “they” think
 - 4) Recommending – a comprehensive plan to correct the disparities and resolve problems which came to the surface
 - > **A communications audit** generally attempts to monitor and evaluate the channels, messages and communication climate of an organization. It may be internal; it may include external systems.⁸ Its tools may include:
 - Communication climate surveys, to see how open and adequate the publics perceive communication channels to be
 - Analysis of interactions in a network, to spot disparities between theory and practice
 - Readership surveys
 - Content analysis
 - Readability studies
 - > Obviously, audits will use the research tools we have been discussing, and other methods you may find appropriate in addition. If you contemplate doing a communications or a public relations audit, a good place to start is with a query to the PRSA Professional Practice Center.
- Now here are the handouts that have been mentioned during this session.
Give class handouts #15 and #17 through #21

IV. Follow-Up Assignment: Mental Calisthenics

Here is a mental exercise to help you get your brain in shape for the APR Examination. If you have been doing calisthenics in earlier sessions this one follows, but you can begin here. Do make time for this. It is an essential workout for your mental muscles.

Give class handout #22 Calisthenics #5, Research Methods

Elapsed Time 1:45-2:00

References

- ¹ This list is from *Using Research in Public Relations*, Broom and Dozier, page 29, copyright 1990 by Prentice-Hall, Inc., Englewood Cliffs, New Jersey. The specifics fit the discussion in *Primer of Public Relations Research*, Stacks, page 25-26, copyright 2002, The Guilford Press, New York NY.
- ² *Consumer Reports*, October 1996. Vol. 61, No. 10. Consumers Union, 101 Truman Ave., Yonkers NY 10703-1057.
- ³ Statistical Abstract of the United States.
- ⁴ Statistical Abstract of the United States.
- ⁵ Otto Lerbinger, "Corporate Use of Research in Public Relations," *Public Relations Review* 3 (Winter 1977): 11, quoted in *Public Relations, The Profession and the Practice*, Otis Baskin, Craig Aronoff and Dan Lattimore, page 123, copyright 1997 The Times Mirror Higher Education Group Inc.
- ⁶ *Public Relations, The Profession and the Practice*, Otis Baskin, Craig Aronoff and Dan Lattimore, page 123, copyright 1997 The Times Mirror Higher Education Group Inc. page 123 ff.
- ⁷ Joyce F. Jones, "The Public Relations Audit: Its Purpose and Uses," R&F Papers, no. 3 (New York: Ruder Finn Rotman, Inc., 1975). Reprinted in *Public Relations Journal* 31 (July 1975) 6-8. Quoted in *Public Relations, The Profession and the Practice*, Otis Baskin, Craig Aronoff and Dan Lattimore, page 123, copyright 1997 The Times Mirror Higher Education Group Inc. Slightly adapted here.
- ⁸ *Public Relations, The Profession and the Practice*, Otis Baskin, Craig Aronoff and Dan Lattimore, page 123, copyright 1997 The Times Mirror Higher Education Group Inc. page 124.

Session 5 Links

Handouts

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|--|---|
| #15 Content Analysis | http://www.prsa.org/_Advance/apr/coachpdf/coachHO15.pdf |
| #16 Table for Determining Random Sample Size | http://www.prsa.org/_Advance/apr/coachpdf/coachHO16.pdf |
| #17 Sample Size and Accuracy | http://www.prsa.org/_Advance/apr/coachpdf/coachHO17.pdf |
| #18 Survey Research | http://www.prsa.org/_Advance/apr/coachpdf/coachHO18.pdf |
| #19 Survey Research:
Tips for Do-It-Yourselfers | http://www.prsa.org/_Advance/aprcoachpdf//coachHO19.pdf |
| #20 Focus Group Research | http://www.prsa.org/_Advance/apr/coachpdf/coachHO20.pdf |
| #21 Scientific Method | http://www.prsa.org/_Advance/apr/coachpdf/coachHO21.pdf |
| #22 Calisthenics #5:Research Methods | http://www.prsa.org/_Advance/apr/coachpdf/coachHO22.pdf |

Visual Aids

- | | |
|--------------------------|---|
| #9 384 (“magic number ”) | http://www.prsa.org/_Advance/aprcoachpdf//coachVis9.pdf |
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