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Chapter 8

Public Relations Research: The Key to Strategy

If you previously ascribed to the common misconception that public relations is a simple use of communication to persuade publics, Bowen (2003), pp. 199–214. you might be surprised at the important role that research plays in public relations management. Bowen (2009a), pp. 402–410. We can argue that as much as three quarters of the public relations process is based on research—research, action planning, and evaluation—which are three of the four steps in the strategic management process in the RACE acronym (which stands for research, action planning, communication, and evaluation).

8.1 Importance of Research in Public Relations Management

Public relations professionals often find themselves in the position of having to convince management to fund research, or to describe the importance of research as a crucial part of a departmental or project budget. Research is an essential part of public relations management. Here is a closer look at why scholars argued that conducting both formative and evaluative research is vital in modern public relations management:

1. Research makes communication *two-way* by collecting information from publics rather than one-way, which is a simple dissemination of information. Research allows us to engage in dialogue with publics, understanding their beliefs and values, and working to build understanding on their part of the internal workings and policies of the organization. Scholars find that two-way communication is generally more effective than one-way communication, especially in instances in which the organization is heavily regulated by government or confronts a turbulent environment in the form of changing industry trends or of activist groups. See, for example, Grunig (1984), pp. 6–29; Grunig (1992a; 2001); Grunig, Grunig, and Dozier (2002); Grunig and Repper (1992).
2. Research makes public relations activities *strategic* by ensuring that communication is specifically targeted to publics who want, need, or care about the information. Ehling and Dozier (1992). Without conducting research, public relations is based on experience or instinct, neither of which play large roles in strategic management. This type of research prevents us from wasting money on communications that are not reaching intended publics or not doing the job that we had designed them to do.
3. Research allows us to *show results*, to measure impact, and to refocus our efforts based on those numbers. Dozier and Ehling (1992). For example, if an initiative is not working with a certain public we can show that ineffectiveness statistically, and the communication can be redesigned or eliminated. Thus, we can direct funds toward more successful elements of the public relations initiative.

Without research, public relations would not be a true *management function*. It would not be strategic or a part of executive strategic planning, but would regress to the days of simple press agency, following hunches and instinct to create publicity. As a true management function, public relations uses research to identify issues and engage in problem solving, to prevent and manage crises, to make organizations

responsive and responsible to their publics, to create better organizational policy, and to build and maintain long-term relationships with publics. A thorough knowledge of research methods and extensive analyses of data also allow public relations practitioners a seat in the dominant coalition and a way to illustrate the value and worth of their activities. In this manner, research is the **strategic foundation** of modern public relations management. Stacks and Michaelson (in press).

8.2 Purpose and Forms of Research

The purpose of research is to allow us to develop strategy in public relations in order to (a) conduct our campaigns with specific purpose and targeted goals, (b) operate as a part of the overall strategic management function in an organization, and (c) measure the effectiveness of public relations efforts. By conducting research before we communicate, we revise our own thinking to include the views of publics. We can segment those publics, tailor communications for unique publics, send different messages to specifically targeted publics, and build relationships by communicating with publics who have an interest in our message. This type of planning research is called **formative research**¹ because it helps us form our public relations campaign. Stacks (2002). Formative research is conducted so that we can understand what publics know, believe, or value and what they need or desire to know before we began communicating. Thereby, public relations does not waste effort or money communicating with those that have no interest in our message.

Research also allows public relations professionals to show the impact made through their communication efforts after a public relations campaign. This type of research is called **evaluation research**². Using both forms of research in public relations allows us to communicate strategically and to demonstrate our effectiveness. For example, formative research can be used to determine the percentage of publics who are aware of the organization's policy on an issue of concern. Through the use of a survey, we might find that 17% of the target public is aware of the policy. Strategically, the organization would like more members of that public to be aware of the organization's policy, so the public relations department communicates through various channels sending targeted messages.

After a predetermined amount of time, a survey practically identical to the first one is conducted. If public relations efforts were successful, the percentage of members of a public aware of the organization's policy should increase. That increase is directly attributable to the efforts of the public relations campaign. We could report, "Members of the community public aware of our new toxic waste disposal initiative increased from 17% to 33% in the last 2 months." Measures such as these are extremely common in public relations management. They may be referred to as *benchmarking* because they establish a benchmark and then measure the amount of change, similar to a before-and-after comparison. Stacks (2002); Broom and Dozier (1990). The use of statistically generalizable research methods allows such comparisons to be made with a reasonable degree of confidence across various publics, geographic regions, issues, psychographics, and demographic groups.

1. Planning research that is conducted so that what the publics know, believe, or value and what they need or desire to know can be understood before communication is begun.
2. Research that allows public relations professionals to show the impact made through their communication efforts after a public relations campaign.

In this section, we will provide a brief overview of the most common forms of research in public relations management and providing examples of their uses and applications and professional public relations. Building upon that basic understanding of research methods, we then return to the theme of the purpose of research and the importance of research in the public relations function.

Formal Research

Research in public relations can be formal or informal. **Formal research**³ normally takes place in order to generate numbers and statistics that we can use to both target communications and measure results. Formal research also is used to gain a deeper, qualitative understanding of the issue of concern, to ascertain the range of consumer responses, and to elicit in-depth opinion data. Formal research is planned research of a quantitative or qualitative nature, normally asking specific questions about topics of concern for the organization. Formal research is both *formative*, at the outset of a public relations initiative, and *evaluative*, to determine the degree of change attributable to public relations activities.

Informal Research

Informal research⁴ is collected on an ongoing basis by most public relations managers, from sources both inside and outside of their organizations. Informal research usually gathers information and opinions through conversations. It consists of asking questions, talking to members of publics or employees in the organization to find out their concerns, reading e-mails from customers or comment cards, and other informal methods, such as scanning the news and trade press. Informal research comes from the boundary spanning role of the public relations professional, meaning that he or she maintains contacts with publics external to the organization, and with internal publics. The public relations professional spends a great deal of time communicating informally with these contacts, in an open exchange of ideas and concerns. This is one way that public relations can keep abreast of changes in an industry, trends affecting the competitive marketplace, issues of discontent among the publics, the values and activities of activist groups, the innovations of competitors, and so on. Informal research methods are usually nonnumerical and are not generalizable to a larger population, but they yield a great deal of useful information. The data yielded from informal research can be used to examine or revise organizational policy, to craft messages in the phraseology of publics, to respond to trends in an industry, to include the values or priorities of publics in new initiatives, and numerous other derivations.

3. Research that typically takes place in order to generate numbers and statistics. Formal research is used to both target communications and measure results.

4. Research that typically gathers information and opinions through conversations and in an ongoing and open exchange of ideas and concerns.

8.3 Types of Research

Research in public relations management requires the use of specialized terminology. The term **primary research**⁵ is used to designate when we collect unique data in normally proprietary information, firsthand and specifically relevant to a certain client or campaign. Stacks (2002). Primary research, because it is unique to your organization and research questions, is often the most expensive type of data to collect. **Secondary research**⁶ refers to research that is normally a part of public domain but is applicable to our client, organization, or industry, and can be used to round out and support the conclusions drawn from our primary research. Stacks (2002); Stacks and Michaelson (in press). Secondary research is normally accessed through the Internet or available at libraries or from industry and trade associations. Reference books, encyclopedias, and trade press publications provide a wealth of free or inexpensive secondary research. Managers often use secondary research as an exploratory base from which to decide what type of primary research needs to be conducted.

Quantitative Research

When we speak of research in public relations, we are normally referring to primary research, such as public opinion studies based on surveys and polling. (The following lists quantitative research methods commonly employed in public relations.) Surveys are synonymous with public opinion polls, and are one example of quantitative research. **Quantitative research**⁷ is based on statistical generalization. It allows us to make numerical observations such as “85% of Infiniti owners say that they would purchase an Infiniti again.” Statistical observations allow us to know exactly where we need to improve relationships with certain publics, and we can then measure how much those relationships have ultimately improved (or degraded) at the end of a public relations initiative. For example, a strategic report in public relations management for the automobile maker Infiniti might include a statement such as “11% of new car buyers were familiar with the G35 all-wheel-drive option 3 months ago, and after our campaign 28% of new car buyers were familiar with this option, meaning that we created a 17% increase in awareness among the new car buyer public.” Other data gathered might report on purchasing intentions, important features of a new vehicle to that public, brand reputation variables, and so on. Quantitative research allows us to have a before and after snapshot to compare the numbers in each group, therefore allowing us to say how much change was evidenced as a result of public relations’ efforts.

5. The collection of unique data, normally proprietary, that is firsthand and relevant to a specific client or campaign. It is often the most expensive type of data to collect.
6. The collection of data that is typically part of the public domain but is applicable to a client, organization, or industry. It can be used to round out and support the conclusions drawn from primary research.
7. Research that is based on statistical generalization. It allows numerical observations to be made in order for organizations to improve relationships with certain publics and then measure how much those relationships have improved or degraded.

Methods of Quantitative Data Collection

- Internet-based surveys
- Telephone surveys
- Mail surveys
- Content analysis (usually of media coverage)
- Comment cards and feedback forms
- Warranty cards (usually demographic information on buyers)
- Frequent shopper program tracking (purchasing data)

8. In quantitative research, the entire public that is sought to be understood or about which statements are made.
9. In quantitative research, a portion of a population that is sought for study.
10. A randomly drawn portion of a population from which the strongest statistical measure of generalizability can be drawn.
11. A randomly drawn portion of a population in which the participants have an equal chance of being selected.
12. Research sampling that does not allow for generalization but that meets the requirements of the problem or project.
13. A population sample drawn from those who are convenient to study.
14. A population sample in which the researcher asks a respondent participating in a survey to recommend another respondent for the survey.
15. Research sampling in which a specific group of people is sought out for research.

In quantitative research, the entire public you wish to understand or make statements about is called the **population**⁸. The population might be women over 40, Democrats, Republicans, purchasers of a competitor's product, or any other group that you would like to study. From that population, you would select a **sample**⁹ to actually contact with questions. **Probability samples**¹⁰ can be randomly drawn from a list of the population, which gives you the strongest statistical measures of generalizability. A **random sample**¹¹ means that participants are drawn randomly and have an equal chance of being selected. You know some variants in your population exists, but a random sample should account for all opinions in that population. The larger the sample size (number of respondents), the smaller the margin of error and the more confident the researcher can be that the sample is an accurate reflection of the entire population.

There are also other sampling methods, known as **nonprobability samples**¹², that do not allow for generalization but meet the requirement of the problem or project. A **convenience sample**¹³, for instance, is drawn from those who are convenient to study, such as having visitors to a shopping mall fill out a survey. Another approach is a **snowball sample**¹⁴ in which the researcher asks someone completing a survey to recommend the next potential respondent to complete the survey. A **purposive sample**¹⁵ is when you seek out a certain group of people. These methods allow no generalizability to the larger population, but they are often less expensive than random sample methods and still may generate the type of data that answers your research question.

Quantitative research has the major strength of allowing you to understand who your publics are, where they get their information, how many believe certain viewpoints, and which communications create the strongest resonance with their beliefs. Demographic variables are used to very specifically segment publics. Demographics are generally gender, education, race, profession, geographic

location, annual household income, political affiliation, religious affiliation, and size of family or household. Once these data are collected, it is easy to spot trends by cross-tabulating the data with opinion and attitude variables. Such cross-tabulations result in very specific publics who can be targeted with future messages in the channels and the language that they prefer. For example, in conducting public relations research for a health insurance company, cross-tabulating data with survey demographics might yield a public who are White males, are highly educated and professional, live in the southeastern United States, have an annual household income above \$125,000, usually vote conservatively and have some religious beliefs, have an average household size of 3.8 people, and strongly agree with the following message: “Health insurance should be an individual choice, not the responsibility of government.” In that example, you would have identified a voting public to whom you could reach out for support of individualized health insurance.

Segmenting publics in this manner is an everyday occurrence in public relations management. Through their segmentation, public relations managers have an idea of who will support their organization, who will oppose the organization, and what communications—messages and values—resonate with each public. After using research to identify these groups, public relations professionals can then build relationships with them in order to conduct informal research, better understand their positions, and help to represent the values and desires of those publics in organizational decision making and policy formation.

Qualitative Research

The second major kind of research method normally used in the public relations industry is qualitative research. **Qualitative research**¹⁶ *generates in-depth, “quality” information that allows us to truly understand public opinion*, but it is not statistically generalizable. (The following lists qualitative research methods commonly employed in public relations.) Qualitative research is enormously valuable because it allows us to truly learn the experience, values, and viewpoints of our publics. It also provides ample quotes to use as evidence or illustration in our strategy documents, and sometimes even results in slogans or fodder for use in public relations’ messages.

16. Research that allows the researcher to generate in-depth, quality information in order to understand public opinion. This type of research is not generalizable but it often provides quotes that can be used in strategy documents.

Qualitative research is particularly adept at answering questions from public relations practitioners that began “How?” or “Why?” Yin (1994). This form of research allows the researcher to ask the participants to explain their rationale for decision making, belief systems, values, thought processes, and so on. It allows researchers to explore complicated topics to understand the meaning behind them and the meanings that participants ascribe to certain concepts. For example, a researcher might ask a participant, “What does the concept of liberty mean to

you?” and get a detailed explanation. However, we would expect that explanation to vary among participants, and different concepts might be associated with liberty when asking an American versus a citizen of Iran or China. Such complex understandings are extremely helpful in integrating the values and ideas of publics into organizational strategy, as well as in crafting messages that resonate with those specific publics of different nationalities.

Methods of Qualitative Data Collection

- In-depth interviews
- Focus groups
- Case studies
- Participant observation
- Monitoring toll-free (1-800 #) call transcripts
- Monitoring complaints by e-mail and letter

Public relations managers often use qualitative research to support quantitative findings. Qualitative research can be designed to understand the views of specific publics and to have them elaborate on beliefs or values that stood out in quantitative analyses. For example, if quantitative research showed a strong agreement with the particular statement, that statement could be read to focus group participants and ask them to agree or disagree with this statement and explain their rationale and thought process behind that choice. In this manner, qualitative researchers can understand complex reasoning and dilemmas in much greater detail than only through results yielded by a survey. Miles and Huberman (1994).

Another reason to use qualitative research is that it can provide data that researchers did not know they needed. For instance, a focus group may take an unexpected turn and the discussion may yield statements that the researcher had not thought to include on a survey questionnaire. Sometimes unknown information or unfamiliar perspectives arise through qualitative studies that are ultimately extremely valuable to public relations' understanding of the issues impacting publics.

Qualitative research also allows for participants to speak for themselves rather than to use the terminology provided by researchers. This benefit can often yield a greater understanding that results in far more effective messages than when public relations practitioners attempt to construct views of publics based on quantitative

research alone. Using the representative language of members of a certain public often allows public relations to build a more respectful relationship with that public. For instance, animal rights activists often use the term “companion animal” instead of the term “pet”—that information could be extremely important to organizations such as Purina or to the American Veterinary Medical Association.

Mixed Methods/Triangulation

Clearly, both quantitative and qualitative research have complementary and unique strengths. These two research methodologies should be used in conjunction whenever possible in public relations management so that both publics and issues can be fully understood. Using both of these research methods together is called **mixed method research**¹⁷, and scholars generally agree that mixing methods yields the most reliable research results. Tashakkori and Teddlie (1998). It is best to combine as many methods as is feasible to understand important issues. Combining multiple focus groups from various cities with interviews of important leaders and a quantitative survey of publics is an example of mixed method research because it includes both quantitative and qualitative methodology. Using two or more methods of study is sometimes called **triangulation**¹⁸, meaning using multiple research methods to triangulate upon the underlying truth of how publics view an issue. See Stacks (2002); Hickson (2003).

17. A research method that combines quantitative and qualitative research. This method is considered to yield the most reliable research results.
18. In public relations, the use of two or more methods of study in order to ascertain how publics view an issue.

8.4 Chapter Summary

In this chapter, we examined the vital role of research in public relations management, both in making the function strategic and in adding to its credibility as a management function. Because research comprises such a large part of the public relations process—three of the four steps in the strategic management process—we discussed the purposes and forms of commonly used research in public relations. The roles of formal and informal research were discussed, as well as the major approaches to research: quantitative (numerically based) and qualitative (in-depth based) as well as the types of types of data collection commonly used in public relations in the mixing of methods.