

# **Using Survey Research to Evaluate Communications Campaigns**

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## **Introduction**

When should a non-profit communications effort use survey research to evaluate a communications campaign? The best advice is: Start before you begin. It sounds like something Yogi Berra might say, but it is the best way to summarize the key to successfully deciding whether or not to use a survey and ultimately in evaluating a communications campaign.

The goal for communications campaigns generally fall into three categories of attempted influence: a) awareness and perhaps salience of a topic, such as building public recognition of global warming and then increasing public concern; b) behavior, that is moving the public to drive less or to buy hybrid fuel cars; and c) policy change, such as getting Congress to pass legislation mandating higher fuel efficiency standards. Other key components of any communication plan are the audience and the overall budget for the campaign.

The use of survey research is perhaps the best example of the need to plan for communications evaluation because it is costly and highly sensitive to three elements of campaign design: your audience, your goal, and your campaign's communications budget.

This paper will outline the questions you need to ask in the design stages of a communications campaign to maximize your chances of using survey research only when you need it, as well as explain the different types of survey methodologies for evaluation and their advantages and disadvantages.

## **What evaluation surveys tell us and when to use them**

Surveys can reveal the impact of communications on an audience's thinking. This valuable tool can tell a communications team:

- If your audience has heard the message,
- If the message has affected your audience's thinking about your issue,
- If the message evoked a positive or negative response,
- Why reactions were either positive or negative, and
- What has motivated your audience to act on your issue.

Three conditions need to be met in order for a survey to produce meaningful results.

- Surveys are most useful when you have a targeted, identifiable audience whose attitudes can be measured.
- A survey is the right choice when you need to know more about how your media or other outreach affected an audience's awareness and feelings. While behavior can be measured in other ways, awareness and feelings cannot.
- Surveys are most useful when high levels of resources are spent communicating to a narrowly defined audience. Too often, non-profit efforts suffer from the opposite proportion – few resources with broadly defined goals and audiences.

Answering the following questions should help you determine whether survey research is an *effective* means to evaluate your efforts and whether it is *practical* for your particular situation.

- *Can you clearly define your audience for communication? Can you find the audience members?*

You must be able to *identify or define* the target audience in order for a representative sample of the members of the audience to be surveyed; and you need to be able to *find* that target audience in order to interview its members. A good example would be members of an organization whose names and contact information appear on a list, or parents of school-aged children in a town who can be found by calling in a fairly small geographic area.

- *Is your audience targeted enough for you to reach with available resources?*

If the desired recipients of your communications are “parents of toddlers across the country,” you will need a great deal of advertising to change enough minds to show up in a survey of parents.

On the other hand, if the target is a few thousand donors to your organization or high school seniors in your town or some other such delimited group, a survey can be an economical way to find out if you made them aware or changed their views.

- *Do you have a definite period in which your audience is receiving campaign communications?*

Survey evaluation is about measurement and in order to measure there needs to be a fixed time period for communication. Otherwise, you will not

be sure if you are actually measuring the impact of your media or some other occurrence which has affected attitudes.

- *Is there a more direct way to evaluate the audience and its response to your communication? Are there alternative measures that make more sense?*

Survey research is not always the most appropriate tool for evaluating communications campaigns. It is relatively costly, and often is not warranted if a communications effort is not spending substantial sums on communicating to a definable audience.

It is often true that the measure of success cannot be counted in percentage point change in a population, but rather in some other form of *countable* responses to communication. Direct mail fundraisers know, for example, that the way to find out if their appeals for donations are effective is to mail out a prototype to a small sample before undertaking a large mailing.

In many cases, evaluation can happen by other means:

- *Content analysis* can measure quantity and quality of media exposure.
- *Counting* the number of web site *hits*, telephone, mail, or email *contacts* can reliably measure real impact of your media.
- Totaling the number of *contributions*, *purchases* of a specific product, *signatures* on petitions, or other *actions* tied to the communications can measure the impact.

Dangers: Surveys can mistakenly label a communications campaign a failure, even though it succeeded in many ways. For example, it is important to resist the proposal to conduct a survey of the general public or some other large audience when your audience is more targeted or your communications have been too light to have changed minds or behaviors.

## **Methodologies**

The main types of survey research for media evaluation projects include benchmark polls, which can be followed up with pre and post-media surveys, and tracking polls.

Each of these methodologies allows an evaluator to go beyond telling a campaign how many stories on its topic appeared in local media, to find out how much those stories may have contributed to changes in attitudes.

## **A. Benchmark polls**

The benchmark survey serves two purposes: 1) informing a communications strategy by defining where an audience stands on a particular topic, and 2) setting a marker on awareness of opinions that can be measured later. The original piece of research often helps to define a campaign's message and targeting.

As an evaluating tool, the benchmark survey is distinguished by two characteristics:

1. *A questionnaire that includes questions on awareness and saliency of the issue you intend to communicate.* The questionnaire may also include questions on attitudes, on values that may underlie attitudes on the issue, message statements pro and con, demographic and lifestyle questions, and questions on policies and behavior.
2. *A sample that matches members of the potential audience and is large enough to analyze different segments of your audience.* Be careful to choose a sample in a benchmark that anticipates all possible areas for media placement. For example, sometimes a benchmark will survey 1000 people across the country and will collect data on television watching habits. If you create television ads that you only run on certain cable television programs, then your media evaluation survey should ideally only survey those who view those cable channels. If the benchmark only garnered 50 or so of those cable viewers, there would not be enough interviews to analyze.

Your benchmark poll can serve as your pre-media measure of public opinion, although if possible, it is better methodologically to conduct a separate pre-media poll immediately before starting your communications.

## **B. Pre and post surveys**

Pre and post polls are relatively short surveys that are taken just before your communications begins and just after it ends to measure recall of your communications. They can help determine whether your audience 1) remembers seeing or hearing anything about your communications and 2) the specific content your audience remembers – to distinguish between your efforts from information they may have gleaned from another source.

These surveys should be used cautiously if you want to measure how effective communications have been to change public opinion in one direction or another, or to change behavior. Television and other communications are powerful tools for persuasion when people are in positions where they must make a decision

about who to vote for in an election, or what to buy when food shopping or purchasing a new pickup truck. However, on social issues, when you are trying to build awareness and salience, even the best television spots will not by themselves change views that have been developed over many years about core values issues, such as abortion, death penalty, or foreign aid, because attitudes are deeply held already. At best, ads can begin to lay the foundation for changing the lens through which people see the issue. It would be a mistake to say the communications failed if attitudes had not shifted according to pre and post polls. However, it would be fair to judge the ads a success if the survey showed members of the target audience saw the ads and remembered something from them.

Elements of pre and post polls are almost the same as those for a benchmark poll:

1. *A questionnaire that includes questions on awareness and saliency of the issue you intend to communicate.*
2. *A sample that matches members of the potential audience and is large enough to analyze different segments of your audience.* The sample for interviewing should only include people who could be exposed to your communications.

A word about control groups: When campaigns want to measure whether they have made a difference in changing attitudes, we use a control group study to determine if attitude shifts in the places which ran the campaign media were the same in places that did not. If the results from the two samples were the same, then you cannot attribute the change to the media. The problem with control groups is choosing the group. If you are doing a media campaign in Toledo or New York, how do you replicate those lifestyle and demographics in another city. We say, do not try. Instead, use a national sample, excluding the places where your media is showing, as your control group.

### **C. Tracking surveys**

Tracking surveys are usually polls that take place during campaign activities and execute roughly equivalent numbers of interviews everyday for a certain number of days, sometimes a week, two weeks, or a month or longer. They can be employed on their own or in combination with pre and post surveys.

Tracking polls have the advantage of giving a campaign a realistic account of how communications are affecting people each day. A campaign can gauge the impact of discrete pieces of communications – which message or type of media breaks through. The typical example is tracking polls run by political campaigns, which track the impact of big TV buys night to night.

Elements of tracking polls:

1. *Samples for each day should be as equivalent and as representative of the population under study as possible.*
2. *Tracking questionnaires should be even shorter than pre and post surveys, focusing simply on recall of advertisements or other communications.* However, be sure not to shortchange demographics, which are essential for good analysis and for making sure the samples day to day are similar.
3. *You can look at results day by day if you have over 100 interviews each day, but a more reliable sample is to roll the last three days.* Usually this is 200 or more interviews, always dropping the oldest day and adding a new one, this gives you more reliable readings.

## **Conclusion**

Surveys are useful and powerful tools in evaluating communication campaigns, but only when they are used appropriately. Planning ahead is the key to success. Any evaluation plan should be part of the overall communications efforts. In this way, resources can be wisely allocated and the desired outcome of communications can be accurately measured.