Methodological proposal for the selection of public opinion measurement and market research technique

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Introduction

• In many countries, face-to-face surveys are currently the technique that many experts consider to be the most reliable for measuring public opinion

(Abundis et al., 2017; Meixueiro, 2012; Moreno, 2017)
Introduction

• However, conducting face-to-face surveys is meeting increasingly adverse conditions
Introduction

• **Telephone** and **online surveys** have been used as an **alternative** to circumvent these barriers

(Burton et al., 2020; Tompson, 2021)
Introduction

• There is currently no model or methodology for selecting the appropriate technique for measuring public opinion or carrying out market research in a specific project.
Central question

• How can we determine the appropriate technique for each research project?
General research question

• Which **elements** should be considered for choosing the appropriate technique for measuring public opinion?
General objective

• To develop a **methodological proposal** for choosing the appropriate measurement technique in public opinion studies and market research projects.
Literature review

- “The future of survey research as we know it faces two critical challenges”

(Kalton, 2019, p. 24)
THEORETICAL AND CONCEPTUAL FRAMEWORK
Public opinion: a multidisciplinary approach

• The concept of **public opinion** is relevant in **several disciplines**
  • Political science, history, social psychology, economics

• In this research, the concept of public opinion is approached from the disciplines of **communication** and **marketing**
Public opinion in communication

- Public opinion is formed by aggregating those of several people, that is, the **sum of points of view of the total population**

(McQuail, 2010)
Marketing and public opinion: a quest for finding the *insights* of stakeholders

- The strategic marketing approach in organizations focuses on data, knowledge and *insights* that allow them to make effective decisions
  - This focus on generating *insights* makes information gathering very important to the companies

(Capon, 2012)
The *spiral of silence* as a barrier in the formation and measurement of public opinion

- Public opinion is the one that can be expressed in public without fear from social repercussions

(Noelle-Neumann, 1974, 1995)
Public opinion measurement and market research techniques

**Traditional**
- Face-to-face surveys
- Telephone surveys
- Postal mail surveys

**Data mining tools**
- Text analytics
- Social media analytics
- Big Data analytics
- Causal analysis

**Sensors**
- Eye tracking
- Facial analysis
- Applied neuroscience
- Passive data measurement
- Biometric response

**Mobile connection**
- Online surveys
- Crowdsourcing
- Mobile qualitative
- Mobile ethnography

**Others**
- Behavioral economics models
- Research gamification
- Prediction markets
- Chatbots
- Virtual Environments/VR Buyer

Descriptive and analytic surveys

• In a **descriptive survey**, the aim is to obtain precision and representativeness in the results.

• In an **analytic survey**, the goal is to establish relationships between variables.

(Baker et al., 2013; Gill & Johnson, 2010)
METHODOLOGICAL FRAMEWORK
Qualitative research

• 18 in-depth interviews with experts in the field of public opinion measurement and market research
## Research questions

| Practice of public opinion measurement and market research today |
| Processes |
| Structure and frequency of use of measurement techniques |
| Circumstances |
| Results obtained |
| Strategies that the experts have in this activity |
RESEARCH FINDINGS
Research Findings

• Public opinion measuring is currently in the process of transformation
Research Findings

• There are *increasing difficulties* in measuring public opinion
Research Findings

- A key element is to establish the **purpose of the research**, which will condition each technique’s *fit for purpose*.
Selection of public opinion measurement and market research technique

A methodological proposal
Selection of the appropriate measurement technique

1. FIT FOR PURPOSE
   - Type of survey
     - Analytical survey
     - Descriptive survey

2. MEASUREMENT
   - Research topic
     - Public opinion
     - Marketing
   - Traditional methods
     - Face-to-face surveys
     - Telephone surveys
     - Online surveys
     - Postal mail surveys
   - Emerging methods
     - Data mining tools
     - Sensors
     - Mobile connection
     - Others

3. REPRESENTATIVENESS
   - Sampling
     - Sampling type
     - Sampling unit

4. AVAILABILITY
   - Resources
   - Time

5. EXTERNAL FACTORS
   - Security conditions
   - Population access
   - Sanitary conditions

6. OTHER BARRIERS
   - Spiral of silence
<table>
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<th>Resource Requirements</th>
<th>Time Requirement</th>
<th>Expected response rate</th>
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Discussion

• The selection of an appropriate technique for measuring public opinion or conducting market research can be determined by considering:
  a) The purpose of the study or survey type, to assess each technique’s fit for purpose
  b) The research topic and what will be measured per se
  c) Who or what do we want to represent
  d) The availability of resources and time
  e) The conditions of the environment
  f) The possible presence of the spiral of silence in the studied phenomenon
Discussion

- Face-to-face surveys continue to be the *gold standard* in the techniques used in Mexico and other countries
  - Although several factors have given rise to alternative measurement methods
Alternate methods can measure public opinion as a complement or substitute for face-to-face surveys, but each one presents its own challenges to achieve the representation and measurement levels that are expected of them.
Discussion

• New techniques to measure public opinion will continue to appear and may be evaluated according to the methodology proposed by this research
Discussion

- Using mixed methodologies is one of the ways in which the problem addressed by this research is solved.

- Extending this methodological proposal to allow for combining criteria and techniques is an interesting future line of research.
Final thoughts

• It is time to review and change the current paradigm that is based on the hegemony of surveys to define what public opinion is
  • If we define it with the tool that we measure it, we are reducing it to only what that tool reaches
Final thoughts

• And since it is a concept of collective construction, we must accept that the diversity that characterizes human beings cannot be reflected by a single measurement tool.
References


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