

# THE GROWTH OF ACADEMIC AND NOT-FOR-PROFIT SURVEY RESEARCH ORGANIZATIONS

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## INTRODUCTION

As is made clear in Jean Converse's superb history, *Survey Research in the United States: Roots and Emergence 1890-1960*, academic and not-for-profit survey organizations were not the originators of survey research, but rather developed in parallel as the field developed in the commercial and governmental areas. In this paper, we discuss the rapid growth in the numbers of such organizations, especially since 1960; describe the kinds of work they did; and speculate about the reasons for their growth and development.

The major source of quantitative data for this paper is *Survey Research*, the newsletter of academic and not-for-profit survey organizations that has been published by us at the University of Illinois for the past 25 years. The number of such organizations is based on counts from the annual listings of these organizations. The discussion of the activities of these organizations is based on a content analysis of the "Current Research" section of *Survey Research*, which in each issue describes the ongoing work of these organizations.

A word of caution about the data: The information in *Survey Research* is simply the collection of information submitted by the survey organizations. Although we believe that the numbers shown are relatively complete and representative, there are almost certainly some missing data. We have not shown data on numbers of survey organizations outside the United States. Although some non-U.S. survey organizations have been regular contributors to *Survey Research*, we suspect that many others exist that are not part of this network.

It is also evident that there are enormous differences in the sizes of these organizations, with the national organizations being far larger than the state and local organizations. The same is true for the size of the projects that are classified. Some of them are multimillion dollar projects, while others have budgets of only a few thousand dollars. We have no size data available from the analysis of *Survey Research*. This information may be available in the files of the individual organizations for some future historical analysis, but for this discussion, all projects are weighted equally. Thus, as with the data that survey organizations produce, the data here are subject to measurement errors. Nevertheless, we hope that you will find these results useful and interesting.

In addition to the quantitative data taken from back issues of *Survey Research*, we had conversations with key personnel at 11 organizations. We asked them questions about the age and size of their organizations, sources of and fluctuations in funding, topic areas for research, the growth of their organizations, and technological changes.

## QUANTITATIVE FINDINGS

### The Growth in the Number of Organizations

In 1950, as best we know, there were three academic survey organizations. These were the Bureau of Applied Social Research at Columbia University, the National Opinion Research Center at the University of Chicago, and the Survey Research Center at the University of Michigan. Each of these three is described in a chapter of Converse's book. By the start of the 1960s, Converse estimates that there were 8 academic survey organizations and by the beginning of the 1970s (when *Survey Research* began publication) there were 20.

Figure 1 shows a smoothed curve of the growth in the number of organizations from 1950 to date. It may be seen that there are currently more than 70 academic and not-for-profit organizations, and as of yet, the sharp logistic upward growth curve shows no indication of leveling out. The sharpest growth period has been since 1979.

### Characteristics of Reported Projects

#### *National Versus Local*

The projects reported in *Survey Research* have been coded by whether they were national/regional or state/local and by major subject areas. Figure 2 shows the percentages of projects that were coded as national/regional. It should be noted that a loose definition of national/regional projects was used. Any study conducted in two or more states or in localities in two or more states was classified as national/regional. Studies conducted in a single state or locality were classified as state/local.

While there is very substantial variation in the percentages from year to year, the data suggest that there has been a decline in the percentage of national/regional projects that is most noticeable in the past decade. For most of the 1970s and early 1980s, national/regional studies accounted for about 37% of all studies; in the past decade, the percentage of national/regional studies has typically been around 25%.

It should be noted that these percentages are not necessarily related to the type of survey organization doing the work. Large, national survey organizations do many projects in local areas, and conversely, state survey organizations are perfectly capable of doing national mail or telephone surveys.

### **Research Topics**

Based on the descriptions given in *Survey Research*, projects were classified into the following categories: health, economics, government, universities/education, and miscellaneous, including methodological studies. Figure 3 shows the percentages of projects in the various categories by decade. It is clear from Figure 3 that health-related topics have consistently comprised the highest percentage of topics studied (excluding the miscellaneous category), with an average of 27% of all studies related to health. The percentage of health-related studies has increased over time; in the period from 1970 through 1979, about 22% of all studies were health related, whereas in the years since then, about 29% of studies have been health related.

It should be noted that our coding scheme includes as health topics studies of individuals' general physical or mental health; specific illnesses; use of medical care, including dental care; studies of drug or alcohol use or smoking; as well as studies of hospitals and medical care providers.

The second most popular topic of study, which we labeled "economics," includes studies of consumer incomes and behavior, all studies related to low-income persons and households, as well as studies of business and workplace behavior. About 19% of all studies were economics related, with no real trend over time. About 10% of all studies asked respondents to evaluate existing government services or were government funded to aid in the planning of new services. Since 1990, this percentage has decreased.

Not surprisingly, since most of these organizations have university affiliations, many of the projects reported were about university issues, mainly involving students and staff, but sometimes determining the attitudes of the general public toward specific universities or higher education in general. In addition, many studies concern other levels of education. There has been a large drop in the percentage of such studies in recent years. In the period from 1970 through 1979, 19% of all studies were coded as university/education, but this percentage has dropped to 10% in the period since 1990. This drop could be caused by two trends: (a) the increase in funding for health studies and (b) the conduct of university-related studies early in the lives of

new organizations before outside funding for other projects is available to a larger extent.

The percentage of methodological studies (included in the miscellaneous category in Figure 3) remained constant at between 5% and 6% over the entire period. The percentage of miscellaneous projects remained constant at about 30% of all studies until the 1990s, when the diverse projects increased to about 35%. During the entire period, interest in certain topics rose and fell. For example, the number of crime-related studies was highest in the late 1970s and early 1980s and has since declined. On the other hand, the number of studies related to environmental issues has shown no trend over the last 20 years. One topic that has generally been avoided by academic and not-for-profit survey organizations has been political polling, either for the media or candidates. This topic has been left to the commercial sector.

### **Why Did It Happen?**

In this part of the paper, we speculate about the reasons for the results that we have presented above. You are free to disagree with these speculations and to suggest other factors that might also have been important. We shall concentrate on three factors that we believe have played significant roles: (a) the increased demand for survey data that followed from increased governmental activities at both the national and state levels, as well as the need to evaluate these programs; (b) the growth of funding for higher education and research; and (c) new technological developments, especially in telephone sampling.

#### ***Increased Demand for Survey Data***

The United States goes through cycles during which public demand for government services rises and falls. Currently, we are in a period in which demand for government services, especially at the national level, is on a downward trend, as was also generally the case in the period between the end of World War II and 1960. The Kennedy-Johnson era, however, brought about a significant increase in government programs, especially through the war on poverty, as well as increased funding of health research, and with this came a need for survey data for planning and evaluation. Some of this demand for increased survey data was met by the increase in the number of academic and not-for-profit organizations. The remainder was met by a growth in the number of commercial organizations—the so-called beltway bandits—as well as an increase in the size of existing not-for-profit and commercial organizations.

Following the increased demand at the national level came an increased demand at the state and local levels for survey data. Often this local demand was to satisfy

information needs imposed at the federal level, but it was also a recognition that local decision making required detailed data that was not available in national samples.

One may well speculate about whether the rapid growth in the number of organizations will level off or possibly reverse in the near future, but that is a topic for discussion at next year's conference.

### ***Growth of Higher Education***

The entire period since the end of World War II, with the exception of the past few years, has been a major growth period for American higher education. There has been a substantial increase in the number of colleges and universities, the number of students they serve, and the resources that are available to them. These resources include not only state but also federal funding for research. Thus, it was not surprising to see a flourishing in the number of new programs, among which was the establishment of survey research facilities.

As with the adoption of other innovations that survey researchers have studied, the establishment of survey research facilities follows the same diffusion process. The success of such organizations at universities that were early adopters has persuaded other universities to adopt. At some point, the growth must level off as saturation is reached. We are unsure when that point will be reached.

### ***New Technology***

It is obvious that the costs of establishing a survey organization have dropped sharply in the past 50 years. One of the major reasons has been the increased use of telephone surveys from central locations for both national and local surveys. This has very greatly reduced the cost of hiring, training, and supervising staffs of interviewers at many distinct locations. Along with the use of telephone methods, there has been a reduction in the significant costs of sampling. In face-to-face household interviews, field counting and listing residences is a major and costly effort. The astounding growth in the power of personal computers and the reduction in their cost has made it possible for even small organizations to use CATI and data analysis packages such as SPSS and SAS.

Thus, establishing a new survey organization is a much smaller risk than ever before. A much higher percentage of costs in operating such a facility can be classified as variable costs, which depend on the actual projects conducted.

One factor in any successful survey organization that is not readily available through technology is the professional staff who need entrepreneurial and

managerial skills as well as technical skills. Such people are always in demand, and there continue to be serious questions about whether we are training enough people to carry on the growth of the field. This also may be a useful discussion topic for next year's conference.

Academic and not-for-profit survey organizations have had rapid growth and continue to comprise a vigorous segment of the survey research field. The reasons for this growth may be found in the increased demand and in the developing technology that has simplified the establishment of new organizations.

### **ANECDOTAL INFORMATION**

#### **Age, Size, and Sources of Funding**

In our conversations with key personnel at 11 survey organizations, we obtained anecdotal information about growth and fiscal issues. Among the 11 organizations whose staff members we spoke with, older organizations tend to be larger than newer ones. Of the five organizations in our sample that were founded in 1974 or earlier, two had 60 or more professional staff members, two had 10 through 59, and only one had 9 or fewer staff members. Of the six organizations that were founded after 1974, none had 60 or more staff, only one had 10 through 59, and five had 9 or fewer professional staff members.

More of the older organizations rely primarily on government-funded projects. Of the five older organizations, two had 85% or more of their projects funded through federal sources, two had over half their budgets coming from state-funded projects, and one had most of its budget coming from state-funded projects, many of which were sponsored by state agencies using federal money. Newer organizations also rely on state and federal money but are more likely to have a greater share of their budgets coming from private sources and foundations.

Four of the organizations we contacted operate solely on soft money, and all of them rely substantially on soft money. Three of the five older organizations had financial difficulties in the early 1980s, when government funding for social science research was cut. In spite of the cuts at the federal level during that time, four of our respondents reported that currently, federal funding is up, and only two noted that it was down for their organization.

#### ***Implications of the Trend Toward Soft Money***

Three issues arose in the context of conversations about the trend towards soft-money funding: fluctuation in funding, handling of indirect costs, and the changing relationships between academic survey organizations and their home institutions as institutional support dwindles

in favor of client support. The latter two issues are closely related and will be discussed together.

A total of five respondents mentioned fluctuations in funding, and three of these reported that the early 1980s was a lean time for their organization. One respondent noted that her organization faces a feast-or-famine situation, in which work for one client creates interest on the part of other clients; a glut of work ensues, and then work slacks off. Three other respondents noted instability in levels of funding from year to year.

Three of the organizations we contacted discussed the impact of their universities allowing them to retain a significant amount of indirect costs. Organizations that can recover some or most of their indirect costs from their home universities are insulated somewhat from fluctuations in funding. Recovery of indirect costs also allows researchers to pursue topics they otherwise could not, as one of our respondents noted. In terms of the benefits soft money operations lend to their home institutions, overhead that universities retain from projects can make successful survey organizations attractive to their home universities. One of our respondents noted that his organization is well liked by the university because of the amount of money it brings in. He noted problems with the relationship that has formed between his organization and the university, however: The university does not have a reward structure in place for researchers who attract grant and contract monies. Another respondent noted a related difficulty her organization has in hiring new staff: Its university affiliation limits the salaries it can offer prospective staff members. Only three organizations specifically mentioned direct university support for salaries, and four respondents noted that the direct support they receive from their universities is minimal, in two cases consisting only of space and utilities.

### **Organizational Growth**

If growth in staff is a sign of fiscal health, then most of the organizations we contacted have managed well over time: 8 of the 11 organizations reported overall growth in staff from the time they were founded. Seven of these have seen growth in the size of their staff while operating on soft money and/or in the period of recovery from funding cuts in the 1980s.

### **Technological Change**

Along with questions on growth and fiscal matters, we inquired about technological changes. Eight respondents said that computerization was the most significant change. Although the most frequently cited change was the switch to CATI, respondents also mentioned the significance of laptops for field work, computerized accounting systems for cost control, and computer

networking for dissemination of data. In addition to the eight who noted changes brought about by computerization, two noted that their (newer) organizations started out as CATI operations. Only one of the organizations does not use CATI, since it is too expensive for the small-scale projects it works with. Even though, as we noted earlier, the cost of personal computers has gone down and made it possible for even small organizations to use CATI and data analysis packages, costs are still high enough to present problems for some organizations. In addition to the organization just mentioned, three others raised the issue of the cost of computerization, pointing out that upgrades are frequent and expensive.

### *Exceptions to the Rule*

Conversations evoked important exceptions to the overall trends revealed in our quantitative data. Where overall, the percentage of government and university/educational studies has declined since the late 1970s, three of the organizations we contacted do a significant percentage of their work on governmental and educational topics. One of these organizations has made evaluation work for the state government its staple, taking advantage of its affiliation with a state university to become the state's preferred provider of evaluation work. For another, public instruction issues have boomed with their state's new emphasis on educational testing; they have doubled their staff in response to this boom. A third does most of its work in public policy by virtue of its academic mission.

### **CONCLUSIONS**

While the demand for survey data may continue to increase in the near future and while the cost of new technology may decrease, it is probable that growth in institutions of higher education has peaked. Although new units may appear, it is doubtful that funding will ever be as secure. Most importantly, governmental funding for survey research, particularly federal funding, may be entering a bleak period similar to the early Reagan years of 1981 through 1983. By next year at this time, it is possible that conditions will be quite different and much will have changed.

Figure 1. Growth in Number of Survey Organizations

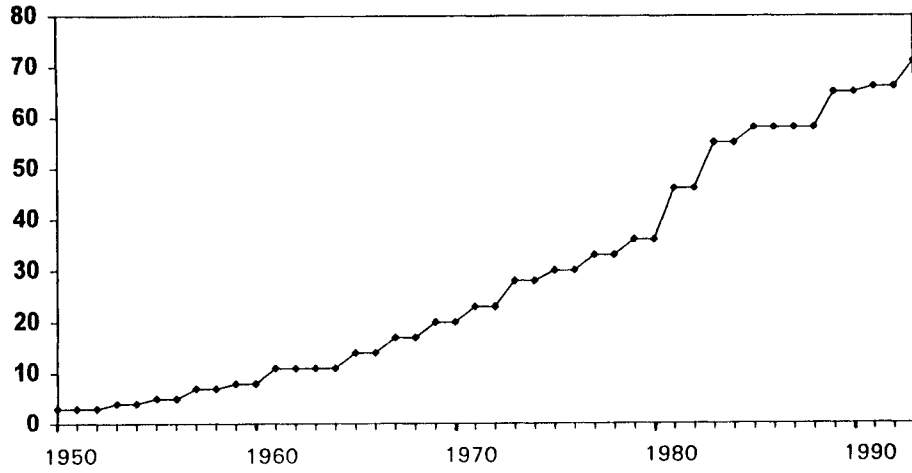


Figure 2. Percentage of Projects Reported as National/Regional

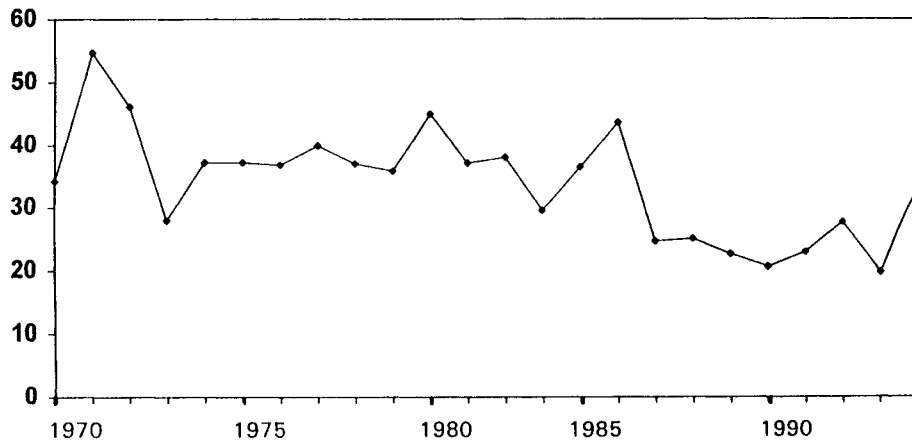


Figure 3. Percentage of Topics Reported by Topic Area by Decade

