PR Metrics: How to Measure Public Relations and Corporate Communication

Jim Macnamara PhD, FPRIA, FAMI, CPM, FAMEC

Background

Today, in both the public and private sectors, accountability and, therefore, measurability are key principles of management. Increasingly, measurement and evaluation need to be more than anecdotal and informal. Objective rigorous methods are required that deliver credible proof of results and Return on Investment (ROI) to management, shareholders and other key stakeholders.

The environment in which public relations and corporate communication operate today is increasingly frequented by management practices and techniques such as:

- Key Performance Indicators (KPIs) and Key Results Areas (KRAs);
- Benchmarking;
- Balanced Score Card; and
- Other systems of tracking key 'metrics' to evaluate activities.

Furthermore, communication campaigns today are increasingly planned and based on research. What do target audiences know already? What awareness exists? What are their perceptions? What media do they rely on or prefer for information?

Research *before* a communication campaign or activity to inform planning is termed **formative research**, while research to measure effectiveness is termed **evaluative research**. Evaluative research was originally thought to be conducted *after* a communication campaign or activity. However, Best Practice thinking outlined in this chapter indicates that measurement and evaluation should begin early and occur throughout communication projects and programs as a continuous process. Undertaken this way, formative and evaluative research inter-relate and merge. Formative research, in simple terms, involves measuring pre-campaign levels of awareness, attitudes, perceptions and audience needs. Hence the term 'measurement' should be understood to include research for both planning and evaluation and both types of research are discussed in this chapter.

PR and corporate communication has met the growing requirements for measurement with a patchy track record and this is widely viewed as a major area for focus in future. In 2002, the International Public Relations Association World Congress held in Cairo agreed that measurement of PR and corporate communication was the 'hottest' and most pressing issue for the practice worldwide. In 2003, a group of academics, researchers and senior practitioners in the US, organised by former Delahaye CEO, Katie Delahaye Paine, held the first PR Measurement Summit at the University of New Hampshire. I was fortunate to be invited to attend and speak at the 2nd PR Measurement Summit in 2004 and also a PR measurement 'Think Tank' in London in the same year.

Despite this increasing focus, measurement remains a key issue of contention among practitioners and their employers and clients and many practitioners continue not to do research despite its widely recognised importance. This chapter explores some of the issues underlying this apparent dichotomy and suggests solutions to some of the practical barriers as well as providing an outline of Best Practice methodologies and approaches.

Public relations research – the missing link

A review of academic and industry studies worldwide shows growing recognition of the need for research and evaluation, but slow uptake by practitioners. In 1983, Jim Grunig concluded: "Although considerable lip service is paid to the importance of program evaluation in public relations, the rhetorical line is much more enthusiastic than actual utilisation". He added:

> I have begun to feel more and more like a fundamentalist minister railing against sin; the difference being that I have railed for evaluation in public relations practice. Just as everyone is against sin, so most public relations people I talk to are for evaluation. People keep on sinning ... and PR people continue not to do evaluation research (Grunig, 1983).

A study by Lloyd Kirban in 1983 among Public Relations Society of America (PRSA) members in the Chicago chapter found that more than half the practitioners expressed a "fear of being measured" (as cited in Pavlik, 1987, p. 65).

In *Managing Public Relations*, Jim Grunig and Todd Hunt (1984), commented:

> The majority of practitioners ... still prefer to 'fly by the seat of their pants' and use intuition rather than intellectual procedures to solve public relations problems (p. 77).

A Syracuse University study conducted by public relations educator, Judy Van Slyke, compared public relations to Jerome Ravetz's 'model of an immature and ineffective science' and concluded that public relations fits the model (Pavlik, 1987, p. 77).

James Bissland found in a 1986 study of public relations that, while the amount of evaluation had increased, the quality of research has been slow to improve (as cited in Pavlik, 1987, p. 68).

In his book on PR research, *Public Relations – What Research Tell Us*, John Pavlik (1987) commented that "measuring the effectiveness of PR has proved almost as elusive as finding the Holy Grail" (p. 65).

A landmark 1988 study developed by Walter Lindenmann *(Ketchum Nationwide Survey on Public Relations Research, Measurement and Evaluation)* surveyed 945 practitioners in the US and concluded that "most public relations research was casual and informal, rather than scientific and precise" and that "most public relations research today is done by individuals trained in public relations rather than by individuals trained as researchers". However, the Ketchum study also found that 54 per cent of 253 respondents strongly agreed that PR research for evaluation and measurement would grow during the 1990s, and nine out of 10 practitioners surveyed felt that PR research needed to become more sophisticated (Lindenmann, 1990).

A study by Smythe, Dorward and Lambert in the UK in 1991 found 83 per cent of practitioners agreed with the statement "there is a growing emphasis on planning and measuring the effectiveness of communications activity" (as cited in *Public relations evaluation*, 1994, p. 5).

In a 1992 survey by the Counselors Academy of the Public Relations Society of America, 70 per cent of its 1,000-plus members identified "demand for measured accountability" as one of the leading industry challenges (ibid).

In 1993, Gael Walker from the University of Technology Sydney replicated the Lindenmann survey in Australia and found 90 per cent of practitioners expressed a belief that "research is now widely

accepted as a necessary and integral part of the planning, program development, and evaluation process" (Walker, 1997, p. 101).

The International Public Relations Association (IPRA) used a section of Lindenmann's survey in an international poll of public relations practitioners in 1994 and confirmed wide recognition of the importance of research for evaluation and measurement.

In the same year, a Delphi study undertaken by Gae Synott from Edith Cowan University in Western Australia found that, of an extensive list of issues identified as important to public relations, evaluation ranked as number one (Macnamara, 1996).

Research by Jon White and John Blamphin (1994) also found evaluation ranked number one among a list of public relations research priorities in a UK study of practitioners and academics.

Notwithstanding this worldwide philosophical consensus, Tom Watson, as part of post-graduate study in the UK in 1992, found that 75 per cent of PR practitioners spent less than five per cent of their budget on evaluation. He also found that while 76 per cent undertook some form of review, the two main methods used were monitoring (not evaluating) press clippings and "intuition and professional judgement" (as cited in *Public relations evaluation*, 1994, p. 5).

A survey of 311 members of the Public Relations Institute of Australia in Sydney and Melbourne and 50 public relations consultancies undertaken as part of an MA research thesis in 1992, found that only 13 per cent of in-house practitioners and only nine per cent of consultants regularly used objective evaluation research (Macnamara, 1993).

Gael Walker (1994) examined the planning and evaluation methods described in submissions to the Public Relations Institute of Australia Golden Target Awards from 1988 to 1992 and found 51 per cent of 124 PR programs and projects entered in the 1990 awards had no comment in the mandatory research section of the entry submission. "The majority of campaigns referred to research and evaluation in vague and sketchy terms," Walker reported (p. 145). Walker similarly found that 177 entries in 1991 and 1992 listed inquiry rates, attendance at functions and media coverage (clippings) as methods of evaluation but she added, the latter "… rarely included any analysis of the significance of the coverage, simply its extent" (p. 147).

David Dozier refers to simplistic counting of news placements and other communication activities as "pseudo-evaluation" (as cited in White, 1991, p. 18).

As well as examining attitudes towards evaluation, the 1994 IPRA study explored implementation and found a major gap between what PR practitioners thought and what they did. IPRA found 14 per cent of PR practitioners in Australia; 16 per cent in the US; and 18.6 per cent of its members internationally regularly undertook evaluation research (*Public relations evaluation,* 1994, p. 4).

Research Finding	USA	Australia	South Africa	IPRA Members
Evaluation recognised as necessary	**75.9%**	**90.0%**	**89.1%**	**89.8%**
Frequently undertake research aimed at evaluating	**16.0%**	**14.0%**	**25.4%**	**18.6%**

Table 6*. Percentage of PR practitioners frequently undertaking evaluation. (International Public Relations Association, 1994.)*

There is evidence that the usage of research in public relations has increased somewhat since 1994, but recent studies in the US and UK show that a majority of PR practitioners still implement programs and activities with totally inadequate research to objectively inform strategies and evaluate results.

A 2001 Public Relations Society of America Internet survey of 4,200 members found **press clippings** were the leading method of measurement cited, relied on by 82 per cent of PR practitioners. Perhaps most alarmingly, '**gut feel/intuition**' was cited by 50 per cent of practitioners as the second most frequently used method for planning and measuring results during the preceding two years. Media content analysis was used by around one-third, with many citing **Advertising Value Equivalents** as a key metric. Surveys and focus groups were used by less than 25 per cent of PRSA members, as shown in Figure 11 (Media relations reality check, 2001).

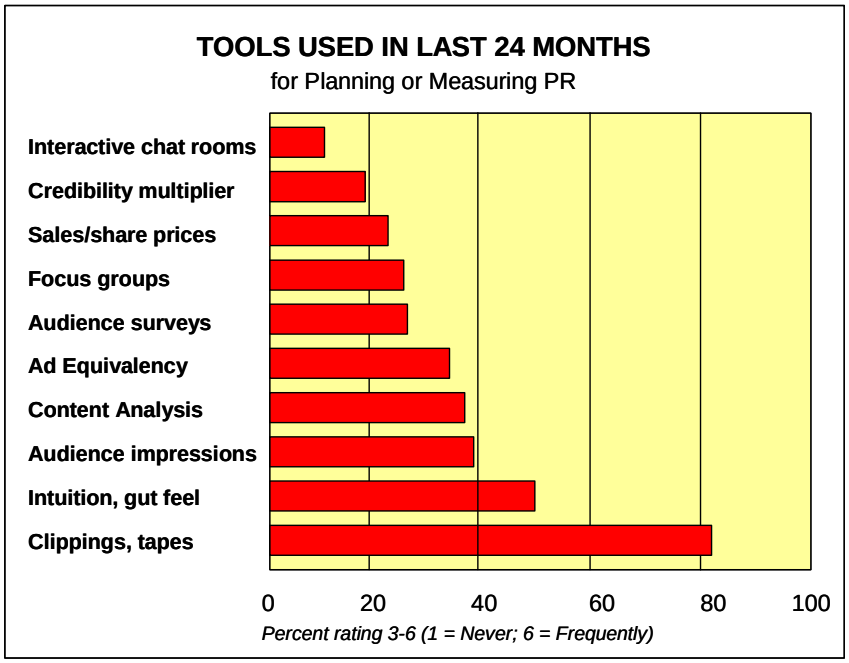

***Figure 11**. Tools/methods most use to measure PR. (Media Relations Reality Check Internet survey of Public Relations Society of America members, 2001).*

An online survey of 3,000 *PRNews* readers in the US sponsored by media tracking system PRTrak® in October 2003 found the percentage of practitioners using media analysis had increased to around 50 per cent on average (55 per cent for PR consultancies and 45 per cent for internal PR departments). However, it showed that more than 80 per cent of practitioners continue to rely primarily on press clippings and 40 per cent or more use Advertising Value Equivalents (AVEs), which will be discussed in some detail later in this chapter.

Research among clients and employers of PR shows that this lack of measurement is costing public relations and corporate communication in terms of budgets, status and acceptance. A survey of marketing directors in the UK in 2000 found only 28 per cent satisfied with the level of evaluation of their public relations, compared with two-third or more who said they were satisfied with evaluation of their advertising, sales promotion and direct marketing.

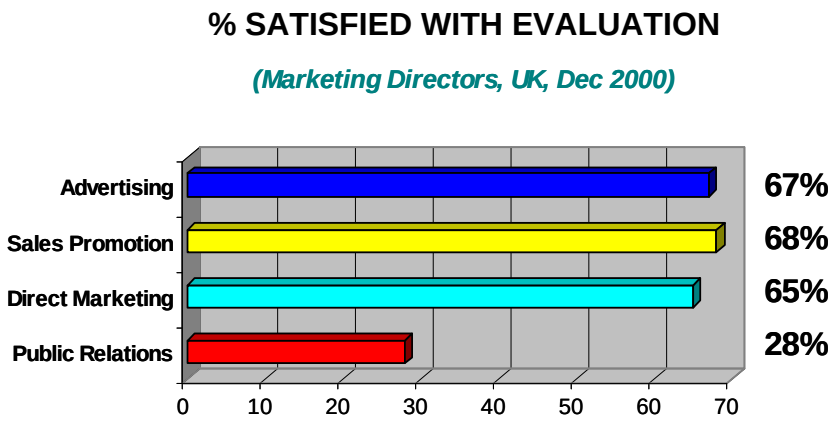

***Figure 12**. Satisfaction rate of marketing directors with evaluation of advertising, sales promotion, direct marketing and public relations (Test Research survey of UK Marketing Directors, 2000.)*

An extensive body of research, of which only a few key studies are summarised here, sends a clear message to PR and corporate communication practitioners. Planning and evaluation research is poorly used and practices need major reform to achieve professionalism and the levels of accountability required by modern management.

Why isn't PR researched and evaluated?

When asked why this low rate of objective research for measurement persists despite clear management demand for accountability, numerous threats to PR budgets, and a continuing search by PR for status and recognition, PR practitioners commonly give three reasons.

As shown in Figure 13, "lack of budget" is the main reason given, following closely by "lack of time" and, somewhat disturbingly, US practitioners also said measurement was "not wanted" in 2001. These views were reflected almost identically in a UK Institute of Public Relations and the PR Consultants Association survey, as shown in Figure 14.

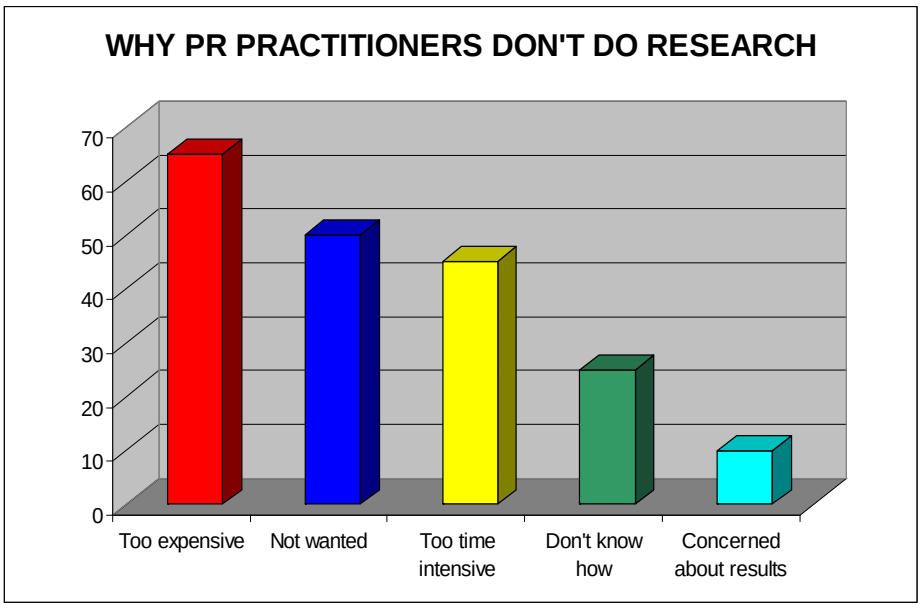

***Figure 13**. Main reasons US PR practitioners do not undertake measurement. (Media Relations Reality Check Internet survey of Public Relations Society of America members, 2001.)*

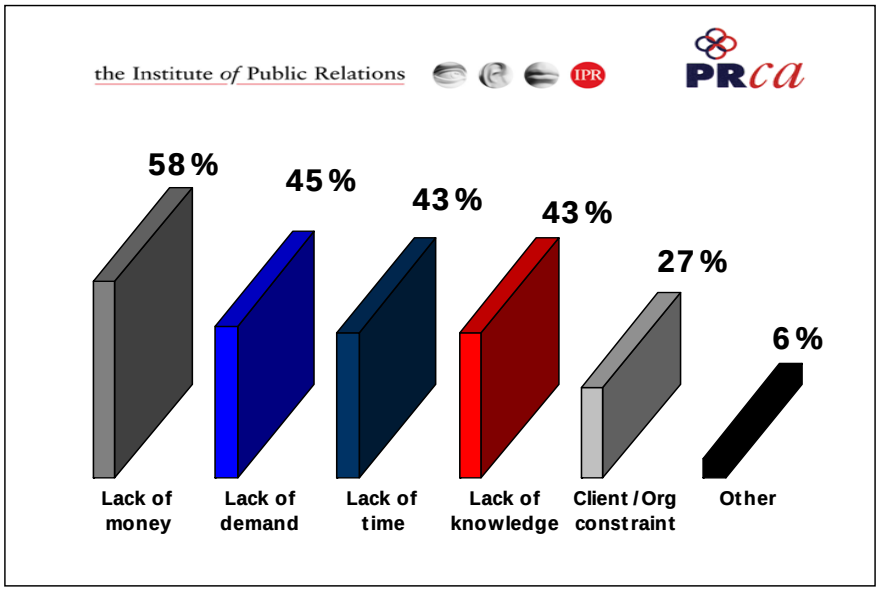

***Figure 14**. Main reasons UK PR practitioners do not undertake measurement. (Survey by the UK Institute of Public Relations and PR Consultants Association, 2001.)*

Given that two major surveys in two different countries found very similar results, one could arguably accept these reasons at face value. However, researchers have contested the findings and argued that they represent excuses more than valid reasons.

A more recent – and, in my view, a more honest – appraisal of PR's lack of objective measurement is shown in the results of a 2003 survey of 3,000 readers of *PRNews* in the US. As shown in Figure 15, this reported that cost remained the main reason measurement is not conducted. But it found "uncertain how to measure" and "lack of standards" were also key barriers to PR practitioners carrying out research to measure PR results and effectiveness. "Lack of interest" among clients and employers fell to fourth place in the reasons/excuses given.

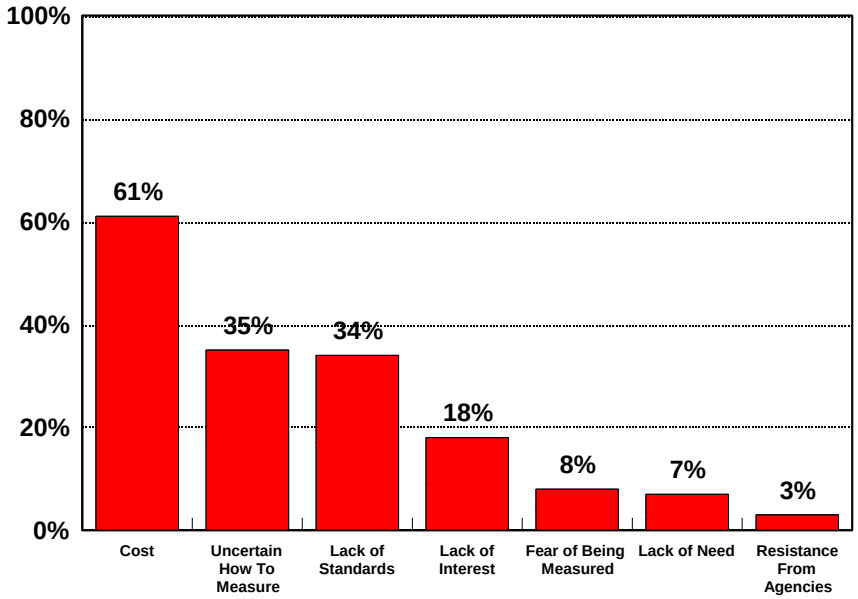

***Figure 15**. Main reasons US PR practitioners do not undertake measurement. (Survey of 3,000 'PRNews' readers sponsored and published by PRTrak, October 2003.)*

In papers, seminars and workshops, I have challenged the validity of the industry's reasons for not doing measurement with the exception of the honest one-third who said they are uncertain how to measure. Cost, lack of time, and lack of management demand are not valid reasons for not doing measurement, as this chapter will show. They are **excuses**. A range of measurement methodologies will be listed and explained in this chapter, including many that are low-cost and even no-cost, and also a number that are quick and easy. Furthermore, for those with lack of time, there are an increasing number of research firms offering specialised research services to the PR and corporate communication sector. If outsourcing is beyond a practitioner's budget, there are also low-cost software tools that automate many of tedious processes of crunching numbers and generating charts and graphs for measurement.

US specialist in PR research and measurement, Walter Lindenmann, also holds this view. On the Institute for Public Relations Web Site, Lindenmann (2005) says practitioners with limited budget can and should "... consider piggyback studies, secondary analysis, quick-tab polls, Internet surveys, or intercept interviews. Mail, fax and e-mail studies are good for some purposes. Or, do your own field research." More on these methods and others later.

Before looking at practical ways to measure PR and corporate communication, it is important to recognise that clearly there are barriers – otherwise everyone would be doing it. More than 20 years of working with practitioners suggests that there are **four key barriers** that need to be recognised and overcome.

1. ***Outputs versus outcomes***

The first is a fundamental issue of definition and understanding of the function of public relations and communication. As discussed in Chapter Two, communication is an *outcome* – not an *output* or series of outputs. Communication is achieved when an audience receives, understands, retains and acts on information in some way. News releases, newsletters, brochures and other information materials put out are a means to an end. My simple definition of communication is "what arrives and causes an effect, not what you send out".

Under the pressure of daily deadlines, many if not most PR and corporate communication practitioners focus predominantly on outputs – churning out media releases, newsletters, arranging events, posting information to Web sites, and so on – and many practitioners measure their achievements in terms of these outputs. Reports of PR and corporate communication departments and PR consultancies typically provide a long list of what they sent out, arranged, who they called, etc. The classic research question is: so what?

As shown in Grunig and Hunt's (1984) Four Models of Public Relations (see Chapter Two), Best Practice PR and corporate communication is about two-way asymmetric or symmetric communication to **persuade** audiences (eg. to change an attitude, buy a product or service, get fit, etc), or to build **relationships**. Noble and Watson (1999) note "The dominant paradigm of practice is the equation of public relations with persuasion" (p. 2). More recently, Grunig (2000) and Grunig and Hon (1999), as noted in Chapter 15, say that relationships are a longer-lasting beneficial outcome of effective public relations.

W. J. McGuire (1984) in *Handbook of Social Psychology* listed six stages of persuasion as (1) presentation; (2) attention; (3) comprehension; (4) acceptance; (5) retention; and (6) action, and in later publications went on to propose eight and even up to 13 stages of communication. PR measurement practices such as collecting press clippings and reporting what was sent out relate to (1) presentation of information, but they give no clue to whether it gained the attention of the

audience, or whether there is comprehension (ie. understanding), acceptance, retention or some resulting effect (attitudinal or behavioural).

Many PR and corporate communication practitioners still subscribe to an outdated 'injection' or 'transmissional' concept of communication based on Shannon and Weaver's (1949) model which suggested that messages could be transferred via a media into an audience and assumed that the audience would *decode* messages with the same meanings that were *encoded*. Fifty years of research has found that audiences interpret messages in different way, often resist messages, forget them, or hear them and ignore them.

Research into usage of new interactive communication technologies such as Web sites, 'chat rooms' and online forums reveals this preoccupation with putting out information is not abating despite increasing education of practitioners. A 2000 survey of 540 Australian PR practitioners found that, while 78.4 per cent believe new communication technologies make it easier to enter into dialogue with stakeholders and gain feedback, 76.4 per cent indicated that the important benefit of new communication technologies was that they "provided new ways to **disseminate** information" (Dougall & Fox, 2001, p. 18). There was no mention of using these channels to gain feedback from audiences or for measuring effects.

This obsession with outputs and lack of recognition of the need to achieve outcomes is a major barrier to PR and corporate communication implementing effective measurement and a major barrier to entering the boardroom or strategic management teams. Management primarily associates results with outcomes. CEOs, marketing directors, financial controllers and other C-suite executives are generally not interested in how much work you have done; they want to know the outcomes – particularly outcomes related to key corporate or organisational objectives. Which brings us to the next key barrier.

PR and corporate communication have to achieve and measure outcomes. Outputs, while important day to day productions and processes, are a means to an end. Management associates results with and perceives value in outcomes.

2. *SMART Objectives*

A second major factor affecting the ability of PR and corporate communication practitioners to measure outcomes, and a factor underlying the perceived value, or lack of value, of PR in organisations, is objectives.

PR and corporate communication objectives are very often not SMART objectives – that is, they are not specific, measurable, achievable, relevant and timely. Many PR and corporate communication programs have broad, vague and imprecise objectives which are unmeasurable even if a six-figure research budget is available. Plans too frequently have stated objectives such as:

- To increase awareness of a policy or program;
- To successfully launch a product or service;
- To improve employee morale;
- To improve the image of a company or organisation;
- To build brand awareness or reputation.

Such objectives are open to wide interpretation – ie. they are not specific. What is a successful launch? How much increase in awareness should you gain? You may generate a lot of

publicity for a launch and increase awareness by 10 per cent, but management may be disappointed. They may have judged the launch in terms of advance orders received and expected a 25 per cent increase in awareness.

Furthermore, these objectives are not specific to PR and corporate communication. They are over-arching top-level objectives that are likely to be shared by advertising, direct marketing, and possibly even HR and other departments. Even if they are achieved, you will not be able to specifically identify the contribution of PR and corporate communication. There is a saying: "Success has many fathers and mothers; failure is an orphan". If substantial top-line results are achieved, it is highly likely that the advertising agency will claim credit. So will direct marketers. And the sales team? That's human nature. And they may be right. You will be left facing the question "Well, what did PR contribute?"

A further failing of these objectives is the lack any baseline or benchmark. What level of awareness currently exists? What is known about employee morale currently? What is the image of the organisation currently? Unless you have a baseline measure – a benchmark – you have nothing to measure against and your contribution will be unmeasurable. This is not SMART planning.

Many leading PR and communication academics point to lack of clear objectives as one of the major stumbling blocks to measurement of PR and corporate communication. Grunig and Hunt (1984) refer to "the typical set of ill-defined, unreasonable, and unmeasurable communication effects that public relations people generally state as their objectives" (p. 122). Pavlik (1987) comments: "PR campaigns, unlike their advertising counterparts, have been plagued by vague, ambiguous objectives" (p. 20). As Wilcox, Ault and Agee (1998) say: "Before any public relations program can be properly evaluated, it is important to have a clearly established set of measurable objectives" (p. 193).

All well and good, but there is a dichotomy implicit in the preceding paragraphs – you have to work with and towards the over-arching objectives of the organisation but, at the same time, you have to show the specific contribution of PR and corporate communication activities.

An approach to break through this barrier is the concept of ***micro-measuring*** and ***macro-measuring*** (Macnamara, 2004). Macro-measuring refers to measuring over-arching organisational outcomes against desired objectives. Micro-measuring refers to the determination of the results of specific communication activities such as events, product launches, media publicity, analyst briefings, etc. While measurement at the macro level is ultimately the most important, micro-measuring to establish the effects, if any, from specific communication activities is important (a) to determine their success or otherwise and whether they should be continued, discontinued or changed and (b) to progressively track cumulative contributions to overall outcomes, as communication is usually a long-term multi-faceted task.

This dual process is summarised with examples in Figure 16. It gives a simple example of an organisation with two key over-arching (macro) objectives – (a) to build brand awareness and (b) to generate sales. These will be achieved as a result of multiple communication outputs including advertising, sales promotions, direct marketing, sales, customer service, and so on. PR and corporate communication must align with and show how it contributes to these macro level objectives.

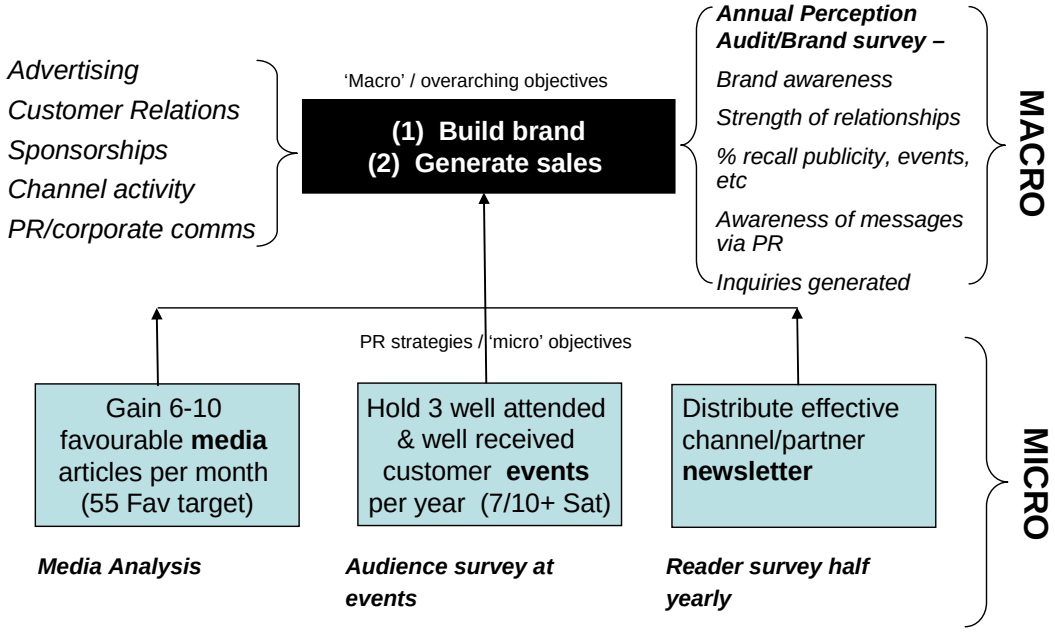

Figure 16*. Macro and micro measuring model (Macnamara, J., 2004).*

Figure 16 shows three specific and fairly typical PR activities – media publicity, events and a newsletter – and how these each can have specific measurable (micro) objectives and methods of measurement. Media analysis, audience surveys and reader surveys, and the measurements (metrics) they produce, will be discussed in detail later in this chapter.

Then, importantly, at the macro level, this approach proposes a second broader level of research such as an annual brand survey or perception audit which, in addition to identifying awareness and perceptions generally, should specifically evaluate recall of PR activities and awareness of messages distributed through PR channels. This can be assisted by tracking some key messages that PR is communicating and which are not contained in advertising, for instance. It is not uncommon for PR to have additional market education or detailed messages to communicate, whereas advertising focuses on one or two key messages. These provide an ideal way of testing awareness and recall generated by PR.

Also, sales tracking at the macro level should incorporate gathering information on the origin of sales inquiries and leads – eg. where did they hear about the product or service or what information prompted them to call. This can help identify inquiries and leads generated by PR and corporate communication.

Note that the PR objectives shown are highly specific. They contain **target numbers**, **percentages**, **ratings** and **timings** such as "gain 5-10 favourable articles per month"; "hold three well-attended events with a 7/10 audience satisfaction rating or higher", etc. The former includes a target favourability rating of 55 which will be explained later under "Media analysis". It is also significant and important that these objectives contain qualitative as well as quantitative metrics.

A further important point about objectives is that they must be agreed by management. Particularly where PR-specific sub-objectives or micro-measuring criteria are set as in Figure 16, PR and corporate communicators must secure management 'buy in' and agreement that achievement of objectives set will contribute to overall corporate and/or marketing objectives.

This is to ensure that specific PR objectives are **aligned** with overall organisational objectives. I often substitute 'aligned' instead of 'achievable' in the SMART acronym. Clearly, objectives must be achievable, but alignment of PR and corporate communication activity with organisational objectives is often sadly lacking. No amount of measurement will help if management cannot see that what you are doing contributes to the organisation's goals and objectives.

To ensure alignment of PR and corporate communication objectives and recognition of this alignment, it is highly recommended that you discuss objectives with management and ask the question: "If we achieve X and Y, do you agree that it will contribute to the organisation's key overall objectives?" If management cannot see that what you are doing or proposing links to their overall objectives, you should not proceed. Either education of management or realignment of your objectives is required.

Setting objectives may take some negotiation with management. But it is essential to get them right. Everything you do afterwards will relate back to objectives. This will become very obvious when we talk about management evaluation systems such as Key Performance Indicators (KPIs) and Return on Investment (ROI).

It is commonsense that you should not set objectives that are unachievable. To ensure objectives are achievable, communication practitioners need to have at least a rudimentary understanding of communication theory. Assumptions about what communication can achieve lead to misguided and overly optimistic claims in some plans which make evaluation risky and problematic. Pavlik (1987) makes the sobering comment that "... much of what PR efforts traditionally have been designed to achieve may be unrealistic" (p. 119).

A comprehensive review of communication theory is not within the scope of this chapter, but some of the key learnings are briefly noted. PR and corporate communication unfamiliar with these areas of research and knowledge will benefit from some further reading to expand their underlying understanding of communication. Public relations courses also could do well to include some basics of communication.

As Flay (1981) and a number of others point out, the Public Information Model of PR (Grunig and Hunt, 1984) which is still widely practised, assumes that changes in knowledge will automatically lead to changes in attitudes, which will automatically lead to changes in behaviour. This linear thinking is a reflection of early '**Domino' theories** and **'injection' and 'transmissional' models** of communication which have been shown to be flawed.

Cognitive dissonance theory, developed by social psychologist Leon Festinger in the late 1950s, was based on research showing that attitudes *can*, in theory, be changed if they are juxtaposed with a dissonant attitude but, importantly, he reported that receivers actively resist messages that are dissonant with their existing attitudes and tend to accept messages that are consonant with their thinking.

Joseph Klapper's **'law of minimal consequences'** further recast notions on the 'power of the Press' and communication effects by showing media messages reinforced existing views more often than they changed views (Klapper, 1960).

Also practitioners may find it useful to read research such as **Hedging and Wedging Theory** developed by Professors Keith Stamm and Jim Grunig (as cited in Grunig and Hunt, 1984, p.

329), which has major implications for public relations and corporate communication. According to Hedging and Wedging Theory, when a person with a firmly held (wedged) view is faced with a contrary view, he or she will, at best, hedge. Hedging is defined by Stamm and Grunig as a cognitive strategy in which a person holds two or more conflicting views at the same time. This research suggests that it may be improbable or impossible for attitudes to be changed diametrically from negative to positive – or vice versa. Attitudes can be moved from wedging to hedging, or hedging to wedging, but not wedging to wedging. Yet, PR programs frequently propose to do this. For example, a company with a poor environmental record is highly unlikely to create a good environmental image in a relatively short period such as 12 months or even a few years. Hedging and Wedging Theory suggests that, if the company can demonstrate change for the better (action) as well as good intentions, it may at best persuade audiences to reconsider and take a more balanced or open-minded position. Full support for the company will take much longer.

A significant contribution to understanding communication is Jim Grunig's **Situational Theory** of communication. In contrast to simplistic Domino Theory, Situational Theory holds that the relationship between knowledge (awareness), attitudes and behaviour is contingent on a number of situational factors. Grunig lists four key situational factors: (1) the level of problem recognition; (2) the level of constraint recognition (does the person see the issue or problem as within their control or ability to do something); (3) the presence of a referent criterion (a prior experience or prior knowledge); and (4) level of involvement (Grunig & Hunt, 1984, pp. 147-160; Pavlik, 1987, pp. 77-80).

Outcomes of communication may be cognitive (simply getting people to think about something), attitudinal (form an opinion), or behavioural. PR and corporate communication practitioners should note that results are less likely the further one moves out along the axis from cognition to behaviour. If overly optimistic objectives are set, particularly for behavioural change, evaluation will be a difficult and frequently disappointing experience.

PR and corporate communication programs need to have SMART objectives – objectives that are specific, measurable, achievable, relevant and timely – and which are also aligned with the over-arching objectives of the organisation.

An approach which allows specific objectives to measure the direct impact of PR and corporate communication as well its longer-term contribution to overall organisational objectives is micro measuring and macro measuring in two stages.

Specific objectives of PR and corporate communication must be agreed with management – management need to 'buy in' to PR objectives, recognising them as contributing to the overall objectives of the organisation.

3. ***Numeric versus rhetoric***

A third key barrier to measuring PR and corporate communication arises out of the occupational and professional composition of the industry. The vast majority of PR and corporate communication practitioners are trained in arts and humanities, coming from backgrounds in and/or completing courses in journalism, media studies, social sciences, design, film, and so on. There are some accountants, engineers, sales-marketing executives and the occasional scientist in PR, but these are comparatively rare – understandably so. Specifically, most PR practitioners are trained in and orientated primarily towards words, visual images and sound – what, in classic Greek terms, are *rhetoric*.

In comparison, '**dominant coalition**' **theory** developed by professors of industrial administration, Johannes Pennings and Paul Goodman, at the University of Pittsburgh, shows that the orientation of the 'dominant coalition' in modern companies and organisations is predominantly *numeric*, with boardrooms and C-suite offices populated by accountants, engineers, technologists, sales and marketing heads, and lawyers (Grunig and Hunt, 1984, p. 120). While the latter do not deal specifically in numbers, their currency is proof. Studies of 'dominant coalitions', and half an hour in any boardroom, will show that the 'language of the dominant coalition' is, most notably (a) financial numbers (dollars, pounds, Euro, Yen, Yuan, Baht, Rupiah, Ringit, etc); (b) raw numbers in data such as spreadsheets; (c) percentages; (d) charts and graphs presenting numeric values; (d) tables; and so on. Text – words and even some visuals – do not rate highly.

PR and corporate communication often does not speak the 'language of the dominant coalition'. PR proposals and reports are primarily presented in words. Management thinks, breathes and dreams numbers. They tune into and understand financial figures, percentages, tables, charts and graphs. PR and corporate communication may as well be speaking Chinese in a roof full of English speakers, or vice versa, in terms of explaining what it does and how it contributes to the organisation.

The solution is not that PR practitioners have to become accountants or engineers or learn statistics. But an ability to use measurement methods which can generate numeric data and present results in numbers, charts, graphs and tables is important and a readily acquirable skill that can help PR an corporate communication talk the language of management.

PR and corporate communication practitioners need to learn to talk the language of management – numbers, percentages, charts and graphs – and express the outcomes of their work in those terms.

4. ***Post-program measurement – the trap of traditional concepts***

The fourth debilitating barrier to effective measurement of PR and corporate communication is the traditional notion of measurement as primarily or exclusively done at the end of activities. For several decades the PIE model was used in management – plan, implement, evaluate. It sounds logical enough at first. You cannot measure results until after something has been done, right? That is true in itself. But you cannot measure results unless you have measured what existed before as well. Also, for practical reasons, you may need to measure at several points along the way.

There are at least five major disadvantages of conducting measurement only at the end of projects or programs:

a. First, **if there is no benchmark measurement done before commencement, it is impossible to identify progress made**. Measurement of any process requires pre-activity measurement, followed by post-activity measurement, with gap analysis to identify change. For instance, how can you show you have increased employee understanding of company policies if you have not measured what they were before you implemented your communication?

b. Second, **there are fundamental strategic planning reasons for doing measurement before you begin**. Management guru, Peter Drucker warns: "It is more important to do the right thing than to do things right". He was not saying that it is not important to do things

right. Of course it is. But, if you are doing the wrong thing, no amount of effort and finesse in execution will achieve the desired result. Too many PR and corporate communication practitioners guess or rely on 'gut feel' in planning, as shown in Figure 11. If you are thinking of producing a newsletter, for instance, how do you know that a newsletter will be effective in achieving your objectives? How do you know whether to produce a print version, an electronic version, or both? Measurement includes measuring existing attitudes, awareness, needs and preferences of target audiences and stakeholders. While referred to as formative or strategic planning research, pre-activity research is measurement because you are measuring prior conditions and audience interests and needs. This is vital information to guide you in your efforts.

c. At a very practical level, if you leave measurement until after activities have been completed, in the real world it is highly probable that **you will be out of budget and out of time**. In conducting workshops on measurement, I always ask participants who has budget or time left at the end of any major activity. Everyone usually laughs. If you don't start measuring early, it likely that you will proceed to completion without any research at all.

d. Fourth, and very importantly, even if you do get to measure, **leaving measurement until the end runs the risk of career-limiting bad news**. What is the strategic value of finding out after you have published your newsletter for a year that it has not been read or well received by readers? Who wants to go to their boss's office and admit: "You know that newsletter we did. Well it didn't work." You have just thrown away a year's production budget. Conversely, measurement early in the project – even before you start – will identify whether a newsletter is what the audience would like, and tracking along the way will indicate whether it is working. Finding out early that something is not working allows you to adjust strategy and avoid bad news at the end. The traditional approach of doing measurement post-activity has been largely responsible for the fear of being measured that plagues much of the PR and corporate communication sector.

e. Fifth, it is likely that **management will not wait until activities are finished before wanting a report** including evidence of effectiveness. This is particularly relevant in activities that are long-term. Your project, or even substantial parts of your plan and budget, could be cancelled unless you can show evidence that it is effective – particularly in this age of tight fiscal policy and frequent budget cut-backs.

These are all compelling reasons to do measurement from the outset of planning, before activities are launched, and to progressively track them along the way. Most researchers recommend research should begin *before* undertaking communication activities. Marston provided the RACE formula for public relations which identified four stages of activity as *research, action, communication* and *evaluation*. Cutlip and Center provided a formula based on this which they expressed as *fact-finding, planning, communication* and *evaluation* (Grunig and Hunt, 1984, pp. 104-108).

Borrowing from systems theory, Richard Carter coined the term 'behavioural molecule' for a model that describes actions that continue endlessly in a chain reaction. In the context of a 'behavioural molecule', Grunig and Hunt (1984) describe the elements of public relations as *detect, construct, define, select, confirm, behave, detect* (pp. 104-108). Each of these suggested approaches features measurement of some kind at the beginning of the planning process, followed by interim measurement in some cases, and comparative research at the end.

Craig Aronoff and Otis Baskin (1983) state explicitly that "... evaluation is not the final stage of the public relations process. In actual practice, evaluation is frequently the beginning of a new effort. The research function overlaps the planning, action and evaluation functions. It is an interdependent process that, once set in motion, has no beginning or end" (p. 179).

Paul Noble argued in 1995 that evaluation should be a proactive, forward-looking activity. He says: "Naturally the collection of historical data is an essential prerequisite, but evaluation is not restricted to making conclusions on past activity. The emphasis on improving programme effectiveness strongly indicates that the information collected on previous activity is used as feedback to adapt the nature of future activities" (Noble, 1995, p. 2).

These researchers are also supported by Tom Watson, Walter Lindenmann and others who have contributed the following models or approaches to measurement which summarise Best Practice in this important area.

Best Practice models for PR research

A number of models have been developed to explain how and when to apply research and evaluation in PR and corporate communication. Five leading models have been identified and reviewed by Paul Noble and Tom Watson (1999 pp. 8-24):

1. The **PII Model** developed by Cutlip, Center and Broom (1985);
2. The Macro Model of PR Evaluation, renamed the **Pyramid Model of PR Research** (Macnamara, 1992; 1999; 2002);
3. The **PR Effectiveness Yardstick** developed by Dr Walter Lindenmann (1993);
4. The **Continuing Model of Evaluation** developed by Tom Watson (1997);
5. The **Unified Model of Evaluation** outlined by Paul Noble and Tom Watson (1999).

PII Model

Cutlip, Center and Broom's PII Model, outlined in their widely used text, *Effective Public Relations*, takes its name from three levels of research which they term "preparation, implementation and impact" (p. 296).

Specific research questions arise at each step in the PII Model, illustrated in Figure 17. Answering these questions with research contributes to increased understanding and adds information for assessing effectiveness. Noble and Watson (1999) explain: "The bottom rung (step) of preparation evaluation assesses the information and strategic planning; implementation evaluation considers tactics and effort; while impact evaluation gives feedback on the outcome" (p. 9).

A noteworthy and pioneering element of the PII Model was the separation of *outputs* from impact or *outcomes* and identification that these different stages need to be researched with different methods. Also, identification of the steps of communication – and, therefore, what should be measured at each stage or level – is useful in guiding practitioners.

However, the PII Model does not prescribe methodologies, but "assumes that programs and campaigns will be measured by social science methodologies that will be properly funded by clients/employers" (Noble & Watson, 1999, p. 9). Perhaps this is easier said than done.

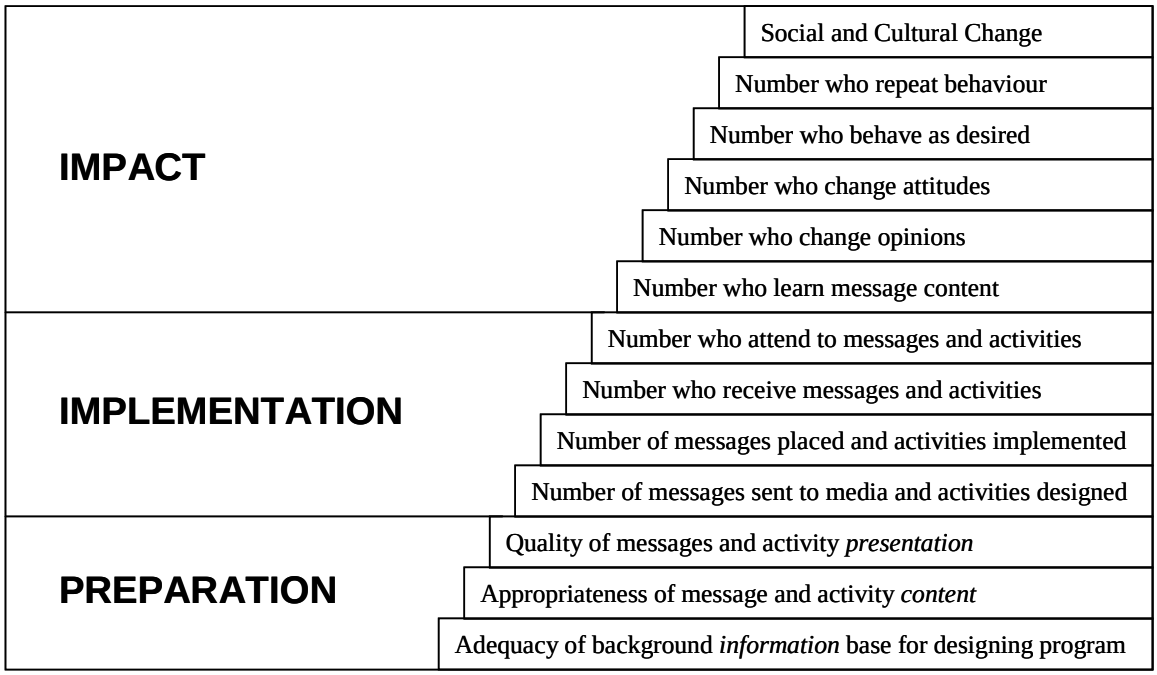

Figure 17. *PII model of evaluation (Cutlip, Center & Broom, 1993).*

Pyramid Model of PR Research

A paper titled 'Evaluation: The Achilles Heel of the public relations profession', an MA thesis extract published in *International Public Relations Review* (Macnamara, 1992) and the 1994 International Public Relations Association (IPRA) Gold Paper Number 11 built on the PII Model, advocating recognition of communication projects and programs in terms of *inputs*, *outputs* and *outcomes* and recommended that each stage should be evaluated.

The Pyramid Model of PR Research, a revised version of the Macro Model of PR Evaluation, is intended to be read from the bottom up, the base representing 'ground zero' of the strategic planning process, culminating in achievement of a desired outcome (attitudinal or behavioural). The pyramid metaphor is useful in conveying that, at the base when communication planning begins, practitioners have a large amount of information to assemble and a wide range of options in terms of media and activities. Selections and choices are made to direct certain messages at certain target audiences through certain media and, ultimately, achieve specific defined objectives (the peak of the program or project). The metaphor of a pyramid is also useful to symbolise what I have argued for more than a decade – that is, more research should be done at the beginning and in the early stages of communication than at the end.

In this model, shown in Figure 18, *inputs* are the strategic and physical components of communication programs or projects such as the choice of medium (eg. event, publication, Web, etc), content (such as text and images), and decisions on format (eg. print or electronic). *Outputs* are the physical materials and activities produced (ie. media publicity, events, publications, intranets, etc) and the processes to produce them (writing, design, etc). *Outcomes* are the impacts and effects of communication, both attitudinal and behavioural.

Within the pyramid, key steps in the communication process are shown, borrowing from Cutlip et al. (1985). However, the Pyramid Model of PR Research goes one step further than most other models discussed in this chapter and endeavours to be instructive and practical by providing a list of suggested measurement methodologies for each stage. The list of methodologies is not exhaustive, but Figure 18 shows a quite extensive list of methods and tools available to practitioners to measure at the various stages.

Of particular note in this model also is the large number of research and evaluation methodologies available to practitioners which are **no cost or low cost** including:

- Secondary data (ie. existing research) which can be accessed within the organisation (eg. market research, employee surveys, customer complaints data, etc) or externally from the Web, the media, research services such as Lexis-Nexis, academic journals etc;
- Advisory or consultative groups;
- Online 'chat rooms' and other informal feedback mechanisms;
- Unstructured and semi-structured interviews;
- Readability tests on copy (eg. Fog Index, Dale-Chall, Flesch Formula, etc);
- Pre-testing (eg. PDF files of proposed publications, mock-ups of Web pages, proposed programs for events, etc);
- Response mechanisms such as 1800 toll free numbers, competitions, or Web visits, downloads, etc from Web statistics.

The Pyramid Model of PR Research is theoretically sound but also practical in that it suggests the highest level and most rigorous measurement possible, but recognises that this will not always be feasible. By identifying a 'menu' of evaluation methodologies at the communication practitioner's disposal from basic to advanced, or what David Dozier (1984) calls a "cluster of technologies", some evaluation is possible in every program and project. With this approach, there is no excuse for having no research.

Feedback loops are not shown on the Pyramid Model of PR Research, something which Noble and Watson (1999) and Watson and Noble (2005) note, but it is implicit in this model that findings from each stage of research are constantly looped back into planning. Cutlip et al.'s stepped PII model and the Pyramid Model both suggest that you do not proceed to the next step unless you have incorporated formal and informal feedback gathered from the previous step. For instance, if early feedback or formal measurement (such as pre-testing) finds that a selected medium is inappropriate, no practitioner would reasonably proceed to distribution of information using that medium – at least one would hope not.

The Pyramid Model deliberately combines formative and evaluative research in the belief that the two types of research must be integrated and work as a continuum of information gathering and feedback in the communication process, not as separate discrete functions. This fits with the "scientific management of public relations" approach to research recommended by Glen Broom and David Dozier (1990, pp. 14-20).

'Pyramid Model' of PR Research

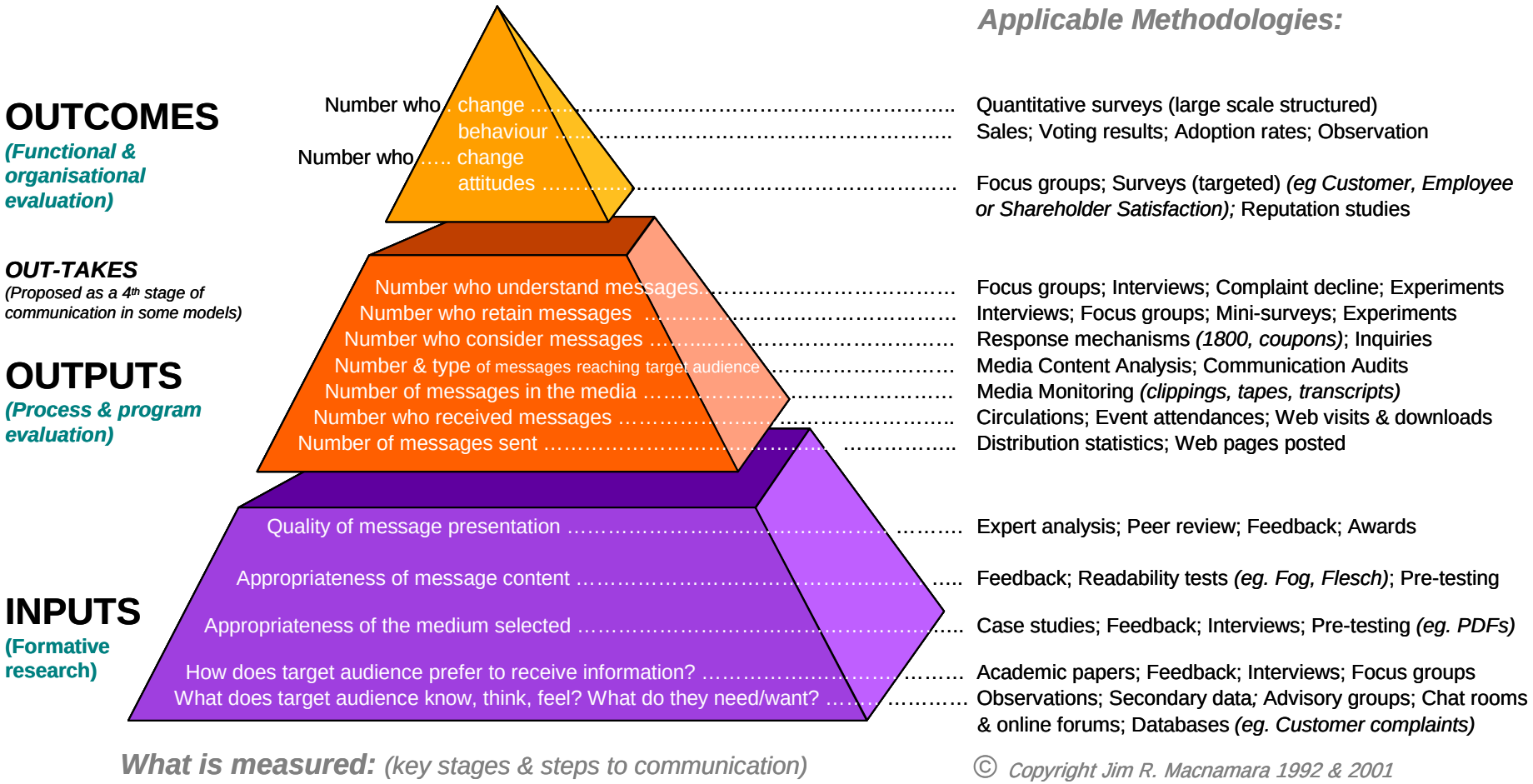

Figure 18. *Pyramid Model of PR research (Macnamara, 1992; Revised 1999 and 2002).*

The Pyramid Model of PR research applies both **closed and open system evaluation**. As outlined by Baskin and Aronoff (1988; 1992, p. 191), closed system evaluation focuses on the messages and events planned in a campaign and their effects on intended publics. Closed system evaluation relies on pre-testing messages and media and then comparing these to post-test results to see if activities achieved the planned effects. Open system evaluation recognises that factors outside the control of the communication program influence results and, as the name suggests, looks at wider considerations. This method considers communication in overall organisational effectiveness. A combination of closed and open system evaluation is desirable in most circumstances.

PR Effectiveness Yardstick

Respected US practitioner and researcher, Walter Lindenmann, has proposed an approach to research and evaluation based on three levels of sophistication and depth, rather than the chronological process of communication from planning through implementation to achievement of objectives. Lindenmann sees level one as evaluation of *outputs* such as measuring media placements or impressions (total audience reached). He terms level two 'Intermediate' and describes this level as measuring comprehension, retention, awareness and reception. Level three is described as 'Advanced' and focuses on measuring opinion change, attitude change or, at the highest level, behavioural change (see Figure 19).

Level One *output* evaluation is the low cost, basic level, but even this should be "more detailed than counting up media clippings or using 'gut reactions' which are informal judgements lacking any rigour in terms of methodology", Noble and Watson (1999, p. 13) explain.

Intermediate measurement criteria in Lindenmann's PR Effectiveness Yardstick introduce a possible fourth stage of communication – *outgrowths*, also referred to as *out-takes* by Michael Fairchild (as cited in Noble & Watson, 1999, p. 13.). This stage refers to what audiences receive or 'take out' of communication activities. Several academics and researchers support identification of this additional stage in communication after *inputs* and *outputs* because, before audiences change their opinion, attitudes or behaviour, they first have to receive, retain and understand messages. They point out that *outgrowths* or *out-takes* are cognitive and suggest a different term for behavioural impact.

However, Lindenmann omits *inputs* as a stage in communication. He splits inputs into his intermediate and advanced levels. Therefore, this model has the advantage of separating cognitive and behavioural impact objectives, but it is not as clear that research should begin before *outputs* are produced.

Like the Cutlip et al. PII Model, Lindemann's Effectiveness Yardstick does not specify research methodologies to use. However, in accompanying text he broadly outlines a mix of qualitative and quantitative data collection techniques such as media content analysis at level one; focus groups, interviews with opinion leaders and polling of target groups at level two and, at level three (advanced), he suggests before and after polling, observational methods, psychographic analysis and other social science techniques such as surveys (Noble & Watson, 1999, p. 13).

In presenting his model, Lindenmann (1993) supports the concept of a "cluster of technologies" (Dozier, 1984) or "menu" of methodologies (Macnamara, 1992) for PR research, saying:

> … it is important to recognise that there is no one simplistic method for measuring PR effectiveness. Depending upon which level of effectiveness is required, an array of different tools and techniques is needed to properly assess PR impact.

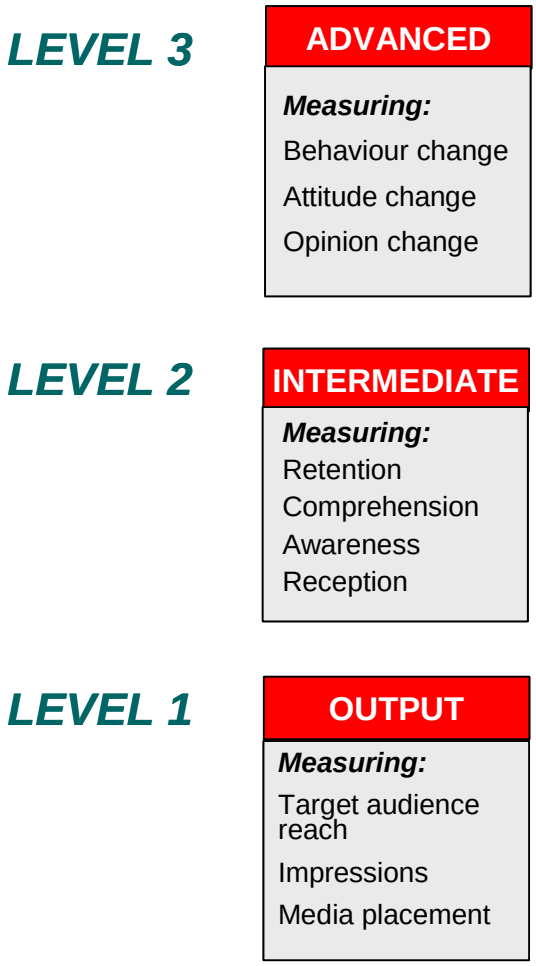

***Figure 19**. PR Effectiveness Yardstick (Lindenmann, 1993).*

Continuing Model of Evaluation

Watson (1997) draws on elements of other models but comments that the PII and earlier Macro Model of PR Evaluation models "are too complex … and lack a dynamic element of feedback" (pp. 293-294). This conclusion is more the result of graphic representation than intent. The PII 'Step' Model and the Pyramid Model of PR Research arrange research and evaluation activities in chronological order of activity from preparation/inputs to impact/outcomes for practical illustration but, in reality, input, output and outcome research is part of a dynamic and continuous process and these models should be read that way.

The lack of an obvious dynamic quality in other models led Watson to develop the Continuing Model of Evaluation (illustrated in Figure 20) of which the central element is a series of loops which reflect Van Leuven's effects-based planning approach and emphasise that research and evaluation are continuous (Noble & Watson, 1999, p. 16).

The elements of the Continuing Model of Evaluation, illustrated in Figure 20, are: (1) an initial stage of research leading to (2) setting of objectives and identification of desired effects; (3) selection and planning of strategy; (4) tactical choices; (5) effects of some kind; and (6) multiple levels of formal and informal analysis are conducted. Feedback from these multiple formal and informal analyses are looped back into each stage of the communication program, with strategy and tactics adjusted as required to finally achieve success. However, while this model graphically shows

the iterative loops of research results feeding back into planning, it is somewhat simplistic and provides no details on what comprises "multiple formal and informal analyses".

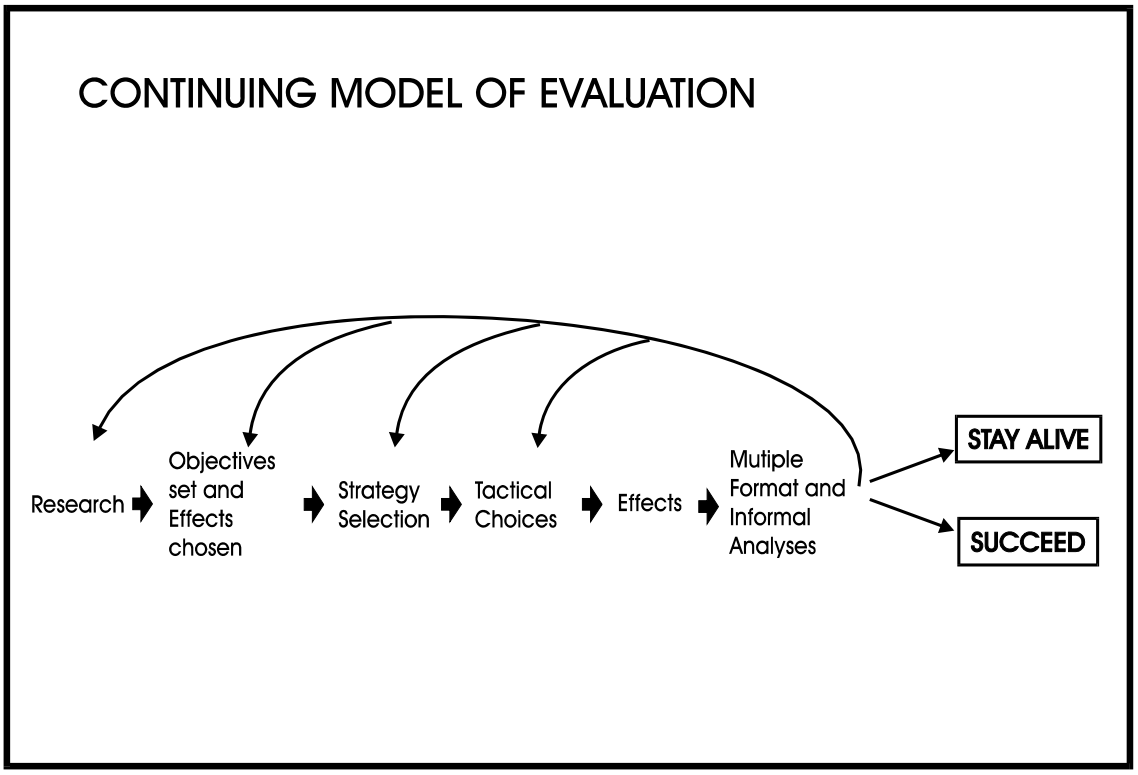

Figure 20*. Continuing Model of Evaluation (Watson, 1997; Noble & Watson, 1999).*

Unified Model of Evaluation

Drawing on all previously developed and published models, Paul Noble and Tom Watson went on to develop a more sophisticated model which they titled the Unified Model of Evaluation as shown in Figure 21. This attempted to combine the best of other models and produce a definitive approach. The Unified Evaluation Model identifies four stages in communication by adding Lindenmann's and Fairchild's concept of *out-takes* or *outgrowths* to the three-stage concept advanced by other models. Noble and Watson prefer to call the four stages or levels *Input*, *Output*, *Impact* and *Effect*.

This supports *inputs* and *outputs* thinking in other models, but separates outcomes into two types: cognitive which they call *impact*, and behavioural which they term *effect*.

Recognition of the need for different research methodologies to measure cognitive and behavioural outcomes is important, but it is not certain whether the substitution of terms clarifies or confuses. In many cases, cognitive change such as increased awareness or a change of attitude (which Noble and Watson call impact) can be seen as an *effect*. Media effects theory (see Gauntlett, 2002; Lull, 2000; Neuendorf, 2002; Newbold et al., 2002) certainly suggests changes to awareness and attitudes are effects. A case can be made for the terminology used in all models and distinctions may be splitting hairs rather than providing clarification for practitioners.

As with many of the other models, research methodologies are not spelled out in the Unified Model of Evaluation. Noble and Watson (1999) point out that "the research methodology required should be governed by the particular research problem in the particular circumstances that apply.

Consequently, any listing would simply be a collection of likely approaches rather than something of universal applicability" (p. 19).

All researchers would undoubtedly agree with Noble and Watson's statement that there are no universally applicable research methodologies. However, by not attempting to list methodologies applicable to various stages of communication, practitioners are left with theoretical frameworks and a lack of practical information on what they can do to implement the theory.

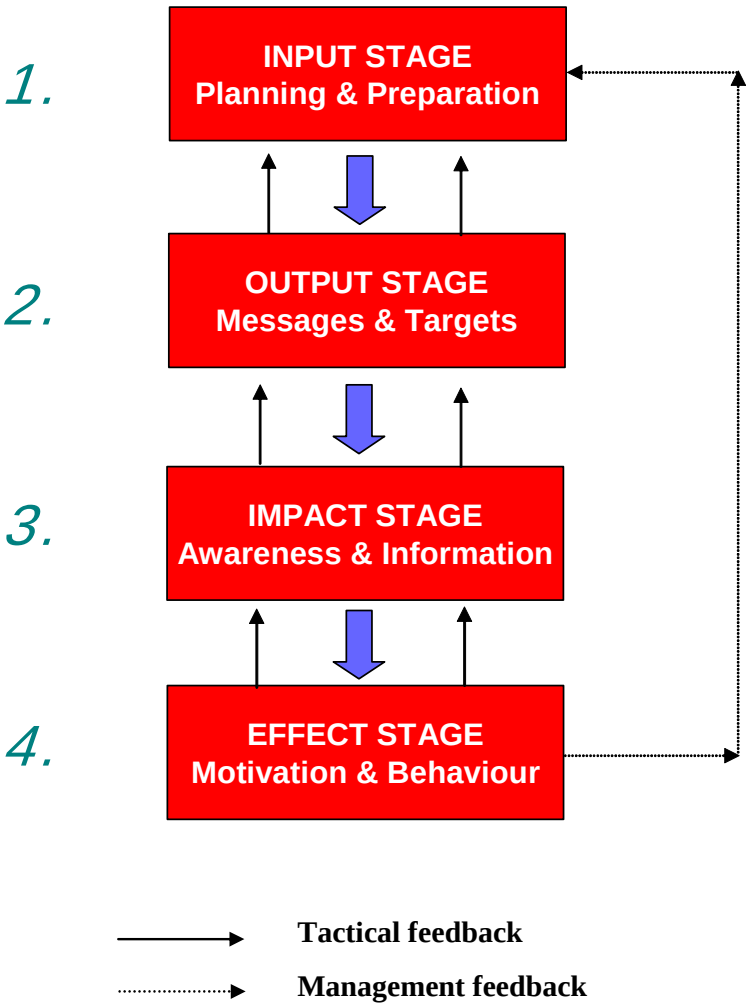

***Figure 21**. Unified Evaluation Model (Noble & Watson, 1999).*

Two other more recent models or approaches are worthy of comment.

IPR PRE Process

The UK Institute of Public Relations issued a second edition of its *Public Relations Research and Evaluation Toolkit* in 2001 presenting a five-step planning research and evaluation (PRE) Process. The PRE Process is presented in a 42-page manual that contains considerable practical advice on the steps and methodologies for planning research and evaluation (Fairchild, 2001, pp. 6-24)

The PRE Process is a five-step model as shown in Figure 22. This model lists the steps of undertaking a communication program as (1) setting objectives; (2) developing a strategy and plan; (3) conducting ongoing measurement; (4) evaluating results and (5) conducting an audit to review.

***Figure 22**. PRE Process in IPR Toolkit (Institute of Public Relations, UK, 2001).*

The PRE Model uses the term 'audit' for pre-activity research. Introduction of yet more terms is probably not warranted and, in this case, may be confusing because audits in the financial world are traditionally conducted post-activity. Also, the PR and corporate communication sector uses the term 'communication audit' which refers to something else again. However, this model is useful in identifying the difference stages of measurement and evaluation. The two terms, *measurement* and *evaluation*, are used interchangeably often, while others bundle them together to try to cover all bases. In simple terms, measurement is the process of gathering quantitative and/or qualitative information about an activity or condition. Evaluation is the analysis of that data and comparison with objectives, from which conclusions can be drawn on effectiveness and future strategy.

The IPR PRE model is helpful to practitioners in that it lists a wide range of relevant planning and research methodologies, a summary of which is presented in Table 7. This is probably its greatest contribution in terms of practical information – an area where many other models are light on.

The Measurement Tree

The Institute for Public Relations in the US has developed the 'Measurement Tree' as a way of simply explaining the importance of its goals and objectives (described as its roots), target audiences (branches), the environment (the atmosphere surrounding the tree), and outcomes that it achieves (described as blossoms). (See Figure 23)

A series of representations of the Measurement Tree then attempts to show the various types of measurement and which part of the tree they measure. (See Figure 24)

STEP	PURPOSE	PLANNING & RESEARCH
1. Audit	*Where are we now?*	• Analyse existing data • Audit of existing communication • Attitudes research, loyalty, etc • Media audit • Desk research • Gather inputs • Establish benchmarks
2. Setting objectives	*Where do we want to be?*	• Align PR with strategic objectives • Breakdown into specific measurable PR objectives • Pre-testing
3. Strategy & plan	*How do we want to get there?*	• Decide strategy • Decide tactics • Decide type and level of research to measure outputs *(media analysis, literature uptake, etc)*, out-takes *(focus groups, surveys, etc)* and outcomes *(share price, sales, audience attitude research, behavioural change)*
4. Ongoing measurement	*Are we getting there?*	• Media content analysis • Audience research • Polls • Focus groups • Interviews • Surveys • Inquiries, sales, etc
5. Results & evaluation	*How did we do?*	• Evaluate results • Capture experiences & lessons • Review strategy • Feed back into continuous PRE process

***Table 7**. List of steps and measurement methods in The IPR Toolkit, UK Institute of Public Relations, 2001.*

While this model pursues the commendable goal of trying to make measurement simple, the reaction of many groups in workshops and seminars is that it is simplistic and the illustration is a little "corny" and "primary school". Questions over the representation of the Measurement Tree should not detract from the importance of information produced by the Institute for Public Relations and available on its Web site and the excellent work of its Commission on PR Measurement and Evaluation. Some of the best and most comprehensive papers available on measurement of PR and corporate communication are freely downloadable from the Institute (see http://www.instituteforpr.com/measurement_and_evaluation.phtml).

Also, US measurement guru, Angela Sinickas (2005), through her company, Sinickas Communications, publishes a comprehensive manual on measurement titled *A Practical Manual for Maximizing the Effectiveness of Your Messages and Media* – the 3rd edition available in 2005 is some 388 pages. Information on the manual is available at http://www.sinicom.com/homepages/pubs.htm.

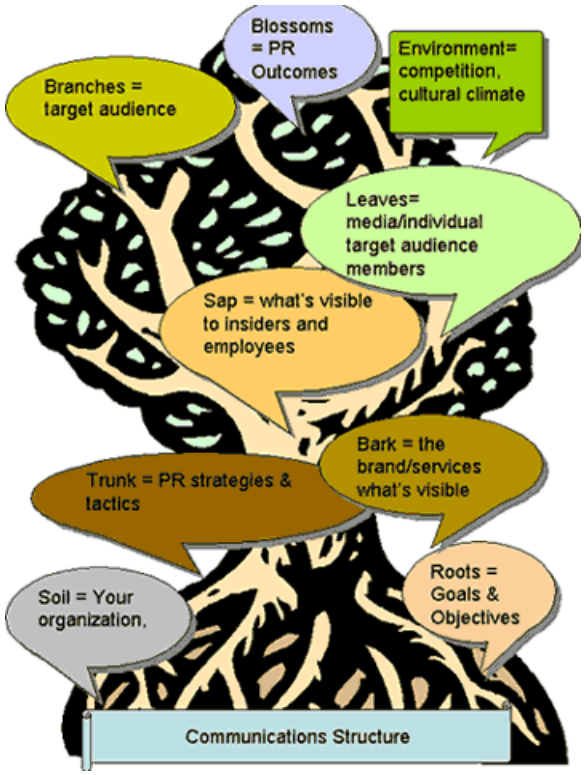

***Figure 23**. The Measurement Tree structure (Institute for Public Relations, Gainsville, Florida).*

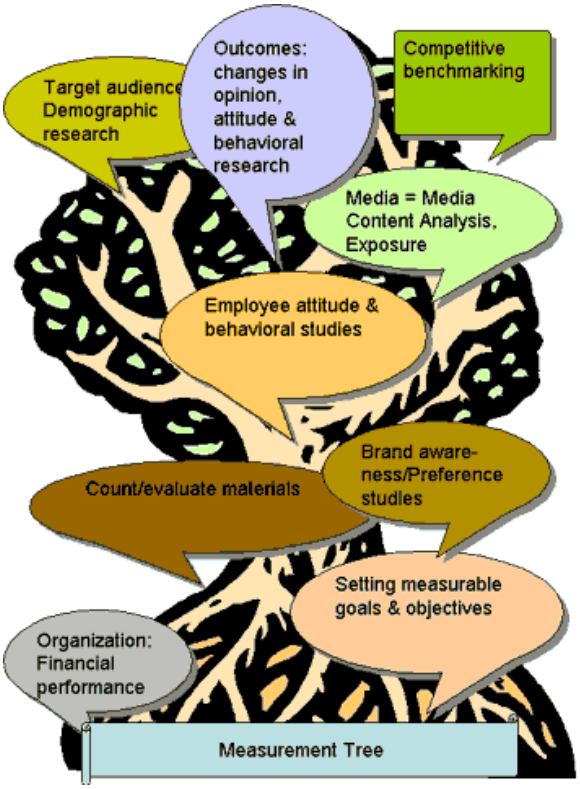

***Figure 24**. The Measurement Tree measurement steps and methods (Institute for Public Relations, Gainsville, Florida).*

The Pyramid Model of PR Research and the IPR PRE Process are the only models which comprehensively list measurement methodologies and, while these must be appropriately selected, this information is important to practitioners to apply research and evaluation. Both models give some guidance on the applicability of methodologies, particularly the PRE Process.

The key point common to all models is that public relations and corporate communication should be research-based and that research should be applied as part of the communication process, not as an add-on or ad hoc element done post-activity simply to appease management or for self-justification. PR and corporate communication practitioners should research *inputs* to planning and preparation (such as decisions on media, content suitability for audiences, etc) as well as establish a baseline or benchmark; *outputs* produced (such as publications, publicity and events); the awareness and attitudinal *impact* or *out-takes* of those communication outputs; and the ultimate *effects* or *outcomes* in terms of attitudinal or behavioural change.

The loop back arrows of the Continuing and Unified Models of evaluation are useful in emphasising that learnings from research at each stage should be fed back into planning and preparation – ie. they are an *input* for the next activity or stage. Other models should be read as implicitly including constant feedback from research into planning.

There are other models and approaches including the **Short Term Model of Evaluation** proposed by Tom Watson (1997) and Michael Fairchild's **Three Measures** (Fairchild, 1997). But these present partial research and evaluation solutions and complement rather than offer alternative thinking to the seven major models outlined.

Enough theory, let's get practical.

PR research methodologies

It is not possible to describe each of the large number of informal and formal research methodologies suggested in the Pyramid Model of Evaluation, the PRE Process and proposed by Jim Grunig and others in anything less than a book dealing specifically with measurement. However, some of the most common and important research methodologies applicable to measuring PR and corporate communication are briefly described.

Methods discussed start from basic and escalate to sophisticated formal research methodologies. Thus, they are not listed in order of importance, rather they are discussed in terms of the planning and implementation process from *inputs*, to *outputs* to *outcomes*. As a general rule, sophisticated formal research methods are required to identify outcomes, particularly to show not only a result but causation by PR and corporate communication. Formal research methods such as surveys can be used earlier in the input-output-outcome process – for example, a survey can be conducted before starting. But, often, basic informal methods are sufficient in the input/planning stage. Hence, these will be dealt with first. But remember the advice given in the section dealing with the Pyramid Model of PR Research – try to use the highest level measurement methods possible. But, in the interest of practicality, if you do not have budget or time, start small and work your way up.

Secondary data

Secondary data refers to information gained from sources other than primary research. If you are short on budget, you should seek out and relish secondary data because it is usually free. Somebody else paid for it. Tom Watson and Paul Noble (2005) in their book *A Best Practice Guide to Public*

Relations Planning, Research & Evaluation, say: "There is no point in reinventing the wheel and it may be that field research, also known as primary research, is not necessary. Desk research unearths information that already exists" (pp. 56-57).

Secondary data comes in many forms and can be internal and external to the organisation. Some examples of secondary data which may be available and which should be considered if relevant are:

- Market research (usually surveys, interviews of focus groups);
- Customer satisfaction research (usually surveys);
- Employee surveys that may have been undertaken by HR;
- Customer complaints database;
- Inquiries database;
- Industry or sector studies that may have been published or available;
- University or research institute data that may be publicly available (eg. Institute for Public Relations in the US);
- Commercial studies that may be available free or for small cost (eg. employee communication research released by Melcrum, a specialist internal communication firm);
- Online research such as Lexis-Nexis;
- Publicly released polls such as those of Gallup;
- Social indicators research available through subscription services or publicly released.

An example of how simple, freely available secondary data can be used for measurement is a PR department which discovered that 20 per cent of all complaints to the organisation cited lack of communication (other complaints related to product quality and other issues). This information was gained by doing basic desk analysis of a database in which the details of complaints were recorded. The PR department recognised an opportunity and introduced a series of update bulletins for customers who were the main group of complainants and established additional information on the organisation's Web site for customers. Revisiting the complaints database six months later found that the proportion of complaints about lack of communication had fallen to eight per cent. Not content to leave it there, the PR head went to the finance department and asked how much it cost the organisation on average to process and resolve a complaint. Finance people can work out such things and, after some calculations, it was found that it cost the organisation US$4,000 in staff time on average for each complaint. Many took weeks to resolve and a few ended up in court. In this large organisation the total volume of complaints was 600 - 700 per annum. A 12 per cent reduction equals around 65 less complaints a year which, at US$4,000 each, equals a total saving of US$260,000 per annum – not to mention the saving in lost brand image and reputation. The cost of producing the monthly bulletins and additional Web site information was US$32,000 – a net financial saving of US$228,000. Who says you can't produce numbers to show the value of PR? That's a Return on Investment (ROI) ratio of more than seven to one. And all that from analysing an internal database and crunching a few numbers in a spreadsheet.

The Web has revolutionised research. Now secondary data is available around the world to assist PR practitioners. In Chapter 11, research reporting that 62 per cent of journalists cannot find what they want on corporate Web sites was cited. This research went on to list journalists' pet hates and improvements that they would like to see made. Ideally, a PR practitioner building the media section of a corporate Web site should consider doing primary research among media he or she deals with to identify their needs, or at least get their feedback on information available. But, even if a practitioner has no time for research and little or no budget, this secondary data from Neilson Normal Group was available to download for US$250. Not as good as doing your own research, but a lot better than no research.

The key limitation of secondary data is that it may not be relevant to your situation. External secondary data will have been done for other companies or organisations which may have different circumstances to yours. In some cases, it may have been gained from another country with major cultural differences. But it is a starting point and often has at least partial relevance.

Case studies

Case studies are often not recognised as research. But, when used systematically, case studies comprise formal research and are very cost effective and useful for identifying Best Practice and for planning strategies that will work, as well as avoiding those which do not work. Two quick examples illustrate.

A major corporation undergoing a name change did not have the budget to commission primary research to identify target audience attitudes and needs. An enterprising young PR graduate decided to analyse how a number of other major companies had handled their name change. One or two had written up their experiences for PR awards and marketing magazines (another useful source of secondary data), but others had not. So the young practitioner decided to phone the PR/corporate communication heads of several companies and ask them if they would talk about their experiences and learnings. She emphasised that she did not want any confidential information and promised to limit her intrusion on their time to a one-hour interview. Some of her older male colleagues scoffed when the suggestion was first made. But they were eating their words within a day or so. Not only were the PR heads of several big companies happy to talk; she couldn't stop them. (Everyone likes to be asked about what they do.) From the interviews and documented information collected, six case studies of similar corporations which had undergone a name change were compared and common successful strategies identified. This was a Best Practice study. It also demonstrates that case studies can be collected proactively, not only passively from existing documentation.

The second example of case studies as a research tool came during a major crisis. Following a meat product contamination which led to the deaths of two people, sales of meat products fell to almost zero. The industry was in disarray and called for a crisis communication plan from several PR agencies. Three responded with the usual PowerPoint presentations and a list of recommendations based on their experience. The fourth spent 48 hours scouring the Web, searching through CompuServe's marketing forum and posting questions in online forums in the US, Canada and the UK. Online forums drew a lot of unwanted junk mail – including one marriage proposal, I am told. But, in just two days, the agency assembled case studies of more than 30 food contaminations and specifically identified the communication strategies that had been most successful and those that had not. The plan they recommended emulated the most successful strategies identified from their research. Of course they got the work and their efforts were very effective.

Case studies are particularly useful in crises as there is usually no time to conduct primary research. They are greatly under-used by PR practitioners. Remember somebody somewhere has already faced what you face, or something similar.

Case studies are readily and usually freely available on PR organisations' Web sites as well as numerous commercial Web sites, in books, awards compendiums and in university libraries.

Readability tests

While not particularly sophisticated or conclusive, another very simple and free *input* level measurement tool is the range of readability tests available. Readability tests, such as Gunning's Fog Index, the Flesch Reading Ease Formula, the Dale-Chall method, Cloze Procedure or Signalled Stopping Techniques (SST), mostly estimate the number of years of education that a reader needs in order to easily understand text. Thus, they are a simple and useful measurement to test whether text

in a corporate profile, brochure, newsletter, Web site or other document is going to be easily read and understood by the audience.

The above methods are explained in Cutlip, Center and Broom (1985, pp. 298-299); Grunig and Hunt (1984, pp.195-198); and Baskin and Aronoff (1993, p. 186). Try them – you might get a few surprises. One engineering institute run a readability test over its newsletter distributed to government officials and media and came up with a score of 18. In other words, readers needed to have completed high school and done six years at university (ie. a Masters Degree at a minimum) to read and understand the newsletter. This *input* level measurement should have been done before the newsletter ever went to print and the finding fed back into revising the newsletter copy.

Pre-testing

The advertising industry uses pre-testing extensively. But PR and corporate communication practitioners, for some reason, seem to largely ignore this very effective *input* level measurement. In the 'bad old days' of graphic design done by hand on boards and type-setting produced on expensive Linotype machines, it was difficult to pre-test many materials. Changes at final artwork stage involved expensive re-working and did not make you any friends. However, in the digital era, designs for posters, brochures, newsletters, corporate magazines, Web pages and copy can be pre-tested easily and cheaply.

One simple method is making PDFs (Portable Document Files) of drafts and mock-ups using Adobe Acrobat software. PDFs can be made of virtually any document including sophisticated graphics, photos, text and slides, and they do not require recipients to have the software in which the original was created. All they need is Adobe Acrobat Reader® which can be downloaded free from the Web if they do not already have it. PDFs can be e-mailed to a sample of your target audience to seek their feedback. HTML can also be used for the same purpose, although creation of files requires HTML programming experience and some network security systems block HTML files.

Rather than relying on intuition ('gut feel') or experience alone to plan communication activities, ideas, designs, text, Web pages and event programs can be pre-tested. Pre-testing is an excellent example of an evaluation methodology which can be carried out at the input/planning stage before implementation. Pre-testing can and often does expose problems in choice of media or content which can then be changed before the material goes into production and is distributed.

Response mechanisms

Response mechanisms such as toll-free numbers, coupons and competitions can be used to track audience receipt and consideration of communication once it has been distributed – ie. they are applicable early in the *output* stage.

A simple example of excellent use of a response mechanism was a young practitioner who ran a **competition** in a corporate newsletter. Each quarter she gave away a new mobile phone or a holiday to encourage response. Entry was via a coupon in the newsletter. But entry required more than the reader's name. Entrants had to answer a simple question each time such as "what was the new product launched last month in retail?" Attracted by the prize of a new mobile phone, the number of entrants grew each quarter and, by examining the number who answered questions correctly, the PR practitioner was able to show not only how many recipients read the newsletter, but how many understood the content and retained key messages. Remember McGuire's stages of communication. With one simple measurement tool costing a few hundred dollars per quarter, she could show that awareness, understanding and retention were increasing among a significant target audience.

Another simple example which shows the power of numbers generated by a response mechanism was a major telecommunications company that was conducting free seminars for small businesses as part of its corporate communication. The seminars were being held in a number of regional cities and towns and each was promoted with advertising in local newspapers and editorial publicity generated through a news release announcing the free seminars and giving registration details. By using two different **1800 toll-free numbers** for registrations – one in advertisements and one in editorial publicity – the PR department was able to easily track how many registrations were received as a result of PR and advertising respectively. While this strategy may not have worked in major national or metropolitan media, local and trade media were happy to run the toll-free phone number in editorial. The results tracked from more than 20 seminars were very interesting. They are shown in Table 8.

Media	Registrations Gained	Budget Spent	Cost per Attendee
Advertising	1,080	$140,000	$130.00
Editorial publicity	310	$12,000	$38.70
TOTAL	**1,390**	**$152,000**	

Table 8. *Analysis of registrations gained from advertising and PR with comparison of cost and Return on Investment.*

This is not a PR versus advertising story. Advertising was clearly necessary to gain attendance. It generated more than three times the number of attendees gained through publicity. However, $140,000 was spent on advertising compared with just $12,000 on publicity. PR costs were low because a single media release was created, with the venue and date changed for each seminar, and distribution was by e-mail with phone follow up. As a result, the cost per attendee shows the cost-effectiveness of PR – in this case editorial publicity. No CEO is going to dispense with advertising given these figures. But nor would they dispense with PR given the very high Return on Investment.

An exciting and more sophisticated method of response tracking is **Web statistics**. Every Web site has software running in the background that tracks a range of usage statistics on the site. This point is an important. No special software is required for gaining Web statistics. It already exists on your Web site. Your IT department uses Web statistics to monitor traffic, pages accessed and files downloaded to ensure adequate bandwidth is provided and that the site is operating efficiently from a technical perspective. But Web statistics can yield very useful data for PR and corporate communication also.

There are many types of Web stats software – more than 300, I am told. To prove the point that cost is not a barrier to measurement, the following example illustrated in Figure 25 was gained using Webalyzer, a freeware program[1]. In other words, if for some reason your organisation does not have a Web server log file analysis program, as these programs are officially called, this one can be downloaded free.

Figure 25 is a screen shot looking at statistics for the Web site of my former research consulting company, MASS Communication Group. The first thing you can see by the address bar at the top is that the viewer does not have to go into or know how to use Webalyzer. To look at most Web stats, you simply go to a Web page – albeit a password protected page, in this case

[1] Webalyzer information was available at http://www.mrunix.net/webalizer/ as at February 1, 2005.

http://www.masscom.com.au/stats/usage. Webalyzer runs in the background to generate the numbers and charts that you see on this screen.

Like all programs, it takes a little getting used to. But once you are familiar with what your Web statistics program presents, you will be able to access important data in minutes. Webalyzer is very simple. Looking at this sample period of October, 2000, Webalyzer is showing the number of hits, files, pages, visits, sites and Kilobytes downloaded for each day of the month, with a column chart for each. Much of this information can be ignored by PR practitioners. First, as I am sure you know, hits are largely irrelevant. Opening of each graphic element on a page is counted as a hit, so one visitor can represent dozens or even hundreds of hits. Also you and I are not interested in files or Kilobytes – that's for the IT people to ponder over. But here's where it starts to get interesting. At a glance, you can see the number of visits to the site overall and to specific pages called URLs (Unique Resource Locators). You can also see what files have been downloaded and how long visitors have been in various sections.

To show how Web statistics can provide very precise measurement of PR and corporate communication, we need to do one more thing. In your communication, rather than always referring audiences to your home page, you should create special URLs (page addresses) for major events, promotions or specific information distributed through PR. Names should not be long as Web users are put off by long names or forget them. For instance, in October 2000, my company had two events to launch a new media analysis software program – one in Hong Kong on October 13 and one in London on October 20. In Hong Kong, in all PR materials including brochures, demos at an exhibition stand and in a presentation on stage, we gave out the Web address www.masscom.com.au/hk. This did not require creation of a whole new Web page. Our IT manager simply had to register a new page address in the directory with a re-direction to the page containing information on the media analysis program. Web page redirections work just like phone redirections. In London we used the address www.masscom.com.au/uk.

Then, simply by looking at our Web statistics, we were able to identify how many visitors had come in via these specific URLs. Those who had could be conclusively claimed to have originated from PR, as the respective URLs were not used anywhere else. Had we simply given out our home page address, we would not have been able to differentiate between visitors to our Web site who came because of advertising or direct mail or referrals from search engines.

This is an excellent way to differentiate PR results from advertising. If advertising is referring audiences to a home page as it usually does, see if you can get one or several special URLs and use these in PR materials, at least for major events and campaigns. These steps are not difficult, although IT departments can be testy at times. The only two things you need to do to use Web statistics are:

1. Get the **password** to access your organisation's Web statistics – and there is no obvious reason why you should not have access; and
2. Persuade your IT department to create some additional **URLs (page addresses) for special PR activities** and use these.

There is also more you can do with Web statistics including viewing downloads, duration of visits to various pages, and many visitors to your site even leave their Web address which contains their name. But you get the idea.

The cost? Nothing. Just a little time. By now you should be able to see why I confidently say that cost is not a barrier to PR measurement.

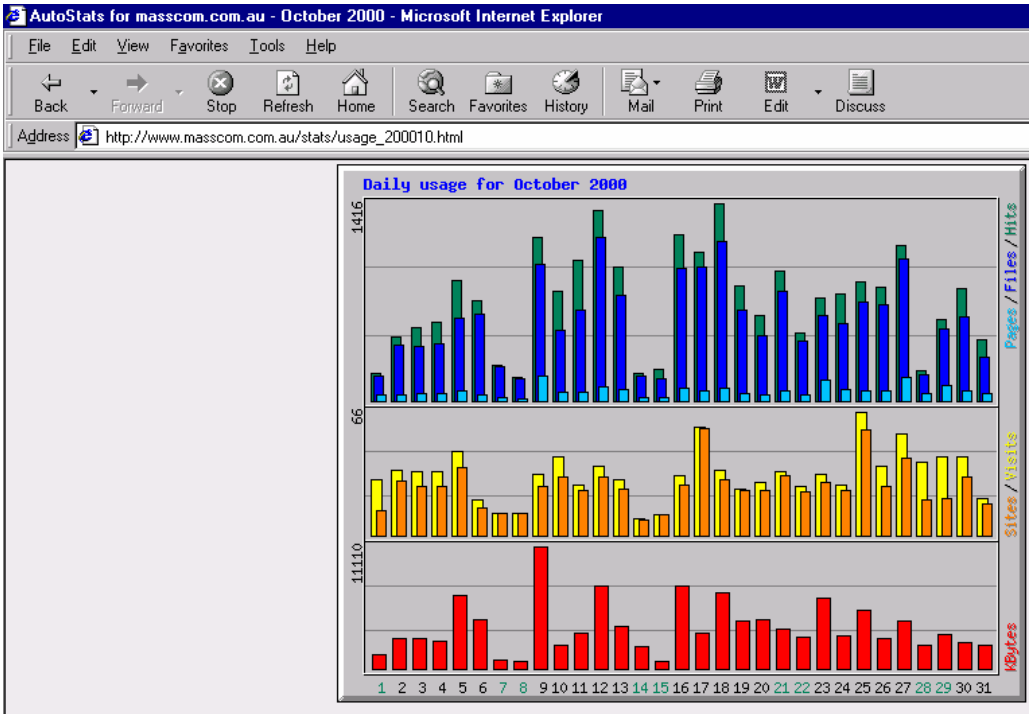

Figure 25*. Sample of Web statistics. (www.masscom.com.au Web site using Webalyzer).*

Response mechanisms such as Web statistics allow us to move along the six stages of communication model and show that our *outputs* (information, messages, etc) are not only being sent out, but that they are being received, acted upon and even understood (through feedback, inquiries and questions asked such a quizzes or competitions). Also, analysis of Web site visits and downloads can be used to track and demonstrate *out-takes* – eg. if samples or demos of products are downloaded and through feedback forms and online forums. Web stats can even show *outcomes* sometimes such as orders placed or bookings made on an e-commerce site.

Media analysis

Media monitoring is widely used in public relations to track editorial publicity – more than 80 per cent of PR practitioners list it as their main tracking and measurement tool. However, collecting press clippings and transcripts or tapes of radio and TV coverage is data collection, not research. As University of Technology Sydney Associate Professor and PR evaluation protagonist Gael Walker (1992) notes: "... collection of data is only the beginning of research".

As well as being rudimentary, press clippings are an entirely *quantitative* form of measurement. Simply collecting piles of clippings is what I refer to as 'measurement by kilogram'. Media articles retrieved in clippings may be negative, promote competitors, or be in media that do not reach your key target audiences. Hence, presenting these as evidence of results is misleading.

In an attempt to provide *qualitative* assessment of media coverage, PR practitioners have accepted that negative publicity is unlikely to achieve objectives, not to mention unwelcome, and begun to adopt various forms of analysis. Media analysis has become the most widely used research methodology in PR and corporate communication and, accordingly, will be examined in some detail. That is not to say it is used well, however, as we shall see.

Systems adopted range from do-it-yourself methods using a spreadsheet and applying subjective ratings of articles to outsourced professional analysis by specialist research firms.

The most basic form of media content analysis is **positive**/**negative**/**neutral** ratings. This rudimentary categorisation is done based on the belief that positive coverage supports achievement of objectives, while neutral coverage at least raises awareness. However, positive/negative/neutral ratings face a number of challenges to their validity and value. Firstly, they are usually applied arbitrarily without objective or consistent criteria. Secondly, they are subjective, often decided by junior media monitoring staff or communication practitioners themselves. Thirdly, they are simplistic and imprecise as some articles are slightly positive or negative overall while others are very positive or negative. Even more confusing, some articles are partly positive and partly negative – which pile do you put them in? Fourthly, and most importantly, they are an unreliable in gauging potential impact because positive articles may be poorly positioned and they may appear in media that do not reach target audiences. In simple terms, positivity is only one of several variables that determine the impact or effects of publicity. Target audience reach (ie. being in the right media), 'share of voice' compared with competitors or opponents, prominence and, most importantly of all, messages communicated are other vital variables to assess before the value of an article can be decided.

With the focus of management on 'bottom line' results, PR and corporate communication practitioners have sought ways to show a dollar value of their efforts. One approach to this has been the practice of calculating **Advertising Value Equivalents (AVEs)**, referred to as 'ad values' for short, which involves counting column centimetres or inches of press publicity and seconds of air time gained and multiplying the total by the advertising rate of the media in which the coverage appeared. It is not uncommon, using this method, to find PR campaigns valued at many hundreds of thousands or even millions of dollars.

There are fundamental practical and ethical flaws in using Advertising Value Equivalents to attempt to measure the value of media publicity as follows:

1. **Editorial publicity can be negative**. Clearly, it is spurious to compare negative publicity with the best creative advertising. Yet most AVE calculations do just this. Few proponents of this method go to the time-consuming trouble of deducting negative articles and negative paragraphs or sections within articles;

2. **Editorial publicity can be neutral**. Even this type of publicity cannot be validly compared with advertising because advertising is never neutral;

3. **Editorial articles often contain coverage of competitors** including favourable references to or comparisons with competitors. Advertising never favourably compares competitors and most advertising avoids giving competitors any mention at all;

4. **Editorial coverage can be poorly positioned** which affects its impact. Advertising is almost always positioned prominently, often with guaranteed prominent positioning through payment of loadings or volume bookings;

5. **Editorial coverage can be in non-target or irrelevant media** – ie. media that do not reach key target audiences and markets, or media that are low circulation and strategically less important. Advertising is placed strategically only in the most important media;

6. **Editorial coverage can be poorly presented** – eg. with ambiguous headlines, the client name buried in the story, and even errors. Advertising is prepared by creative professionals for maximum impact using eye-catching visuals and sophisticated design;

7. AVE calculations are usually based on **casual advertising rates** which are much higher than the rates negotiated for advertising campaigns. This further inflates the so-called value of publicity in many cases;

8. Perhaps most significant of all, even *if* editorial meets all the key characteristics of advertising – ie. if it is positive, only promotes the client organisation, is well positioned in strategically important media and well presented – **Advertising Value Equivalents only calculate the cost of buying equivalent media space and time for advertising; they make no effort to measure the impact or effect** of the content. No one in marketing or management would measure the value of advertising simply in terms of its cost – "it must be a good campaign because it cost $7 million!" Advertising is measured, at a minimum, in terms of reach, share of voice, recall of messages, and often in outcome terms such as inquiries, leads or sales. Thus, even when editorial is highly positive and well positioned, the use of AVEs as a measure of PR effectiveness is flawed (Macnamara, 2000).

Advertising Value Equivalents are **invalid** and **irrelevant** as a measure of editorial publicity because:

- Advertising and editorial publicity are **rarely if ever equivalent**; and
- AVEs **measure cost, not value** – and an unrelated cost at that (advertising which is different to editorial media content in terms of content, placement, presentation and reader response).

Some users of Advertising Value Equivalents go beyond comparison with advertising rates and apply **multipliers** of the 'ad value' from three times up to nine times or even more, based on an assumption that editorial is more credible because it is third party comment whereas advertising is self-promotion. There is no research basis whatsoever for such weightings and the leading PR research institute in the world describes use of AVE multipliers as "unethical" and "dishonest". (See expert views cited later in this section.)

This is not to argue that editorial is less valuable or less effective than advertising. To the contrary, editorial content can, in some circumstances, have far greater impact and effect than any amount of advertising. For instance, one or two paragraphs of editorial (1 column x 2 centimetres) in an influential column or news section, such as a favourable profit forecast or a positive mention of a restaurant, can boost a share price and/or increase revenue by thousands or even millions of dollars. Yet a 2 x scm advertisement, if such an advertisement was able to be purchased, would be very unlikely to have any such effects. Furthermore, the AVE of such editorial would be only a few hundred dollars – thus grossly under-estimating the value of PR.

In a wider context, AVEs are also deficient as a measure of PR because public relations involves much more than media publicity. Most PR campaigns involve other 'media' such as events, publications, the Web and specialist areas of communication such as community relations and employee communication which cannot be measured in terms of advertising value equivalent.

Proponents and defenders of AVEs as a measure of publicity present two main arguments which are both fundamentally flawed. The first common argument presented, particularly by PR consultancies, is that their clients want them and even pressure PR practitioners to provide AVEs. This is advanced naively under the premise that commercial pressures justify any behaviour.

It is true, unfortunately, that some companies ask for AVEs. Exasperated by a lack of measurement of PR effectiveness, some management, particularly marketing and sales executives familiar with

advertising, ask for advertising cost equivalents to gain some indication of what PR generated at least in a raw quantitative way.

In the first instance, client demand for AVEs is the fault of the PR industry stemming from its failure to come up with and adopt reliable valid ways of measuring its impact and effects. Research studies cited earlier in this chapter show that around 80 per cent of PR practitioners still rely on counting press clippings – irrespective of quality, target reach, etc – as their primary method of measuring results and reporting.

But furthermore, this argument raises serious professional and ethical issues about public relations. All professionals face client pressures – some reasonable, some not. Accountants are pressured by their clients to minimise their tax. Lawyers are asked by those they represent to do everything they can to win cases. Sometimes, these and other professionals are asked to do things that are not regarded as professional or ethical.

Professionals are expected to resist such pressures and act with the highest integrity. They are expected to provide professional advice, persuasive counsel and sometimes client education. When professionals such as accountants and lawyers breach codes of conduct or ethics, as some do at times, these professions have strict procedures for dealing with such behaviour. Always, professionals are expected to maintain standards of conduct and ethics irrespective of commercial pressures.

Public relations practitioners who provide AVEs as a form of measuring PR value are providing misleading information to their clients and employers. In the very least, this is unprofessional. Public relations practitioners who are aware of the invalidity and irrelevance of AVEs – and few could be unaware of at least serious questions about AVEs after years of debate – but still provide these to clients and employers, could be held to be knowingly and intentionally providing misleading information. Such behaviour, under most codes and guidelines, is patently unethical. Commercial pressures are no justification or excuse.

Some proponents of AVEs point to studies showing correlations between volume of editorial coverage and share price rises, sales increases, and even the popularity of political leaders, as evidence of validity. There are studies which show often high levels of correlation between media exposure and success in various fields. However, such claims confuse *correlation* and *causation* – two entirely different concepts, as any researcher knows. There are three key criteria that need to be met in order to show causation. Expressed simply, these are:

- The alleged **cause must precede the effect**. This sounds obvious, but frequently it is claimed or assumed that publicity caused a share price or market share to rise or fall when, in reality, much of the media coverage was reporting the share price movements and market trends (ie. post event) or reporting analysts' predictions which may have caused the effects;

- There **must be an established linkage** between the alleged cause and effect. For instance, in the case of media publicity, can it be established that the audience read, saw or heard the media content concerned?

- As far as possible, **other potential causes must be eliminated**. This can be very difficult to do as often opinion is affected by multiple influences.

Simple correlations do not prove anything. There could be a correlation between the volume of publicity and tidal movements or phases of the moon! That does not prove that one caused the other.

AVEs have been condemned by international public relations and advertising bodies, academics and professional research institutes. Wilcox, Ault and Agee (1992) sum it up simply, saying that using AVEs/ad values/ad equivalency to measure PR is "a bit like comparing apples and oranges" (p. 211).

The UK Institute of Public Relations (IPR) *Research & Evaluation Toolkit*, one of the most comprehensive guides on evaluation and measurement of public relations, states:

> Despite their widespread use, advertising value equivalents (AVEs) are flawed by the fact that advertising and PR use quite different methodologies. Valid comparison is therefore difficult, if not impossible. Opportunities to see (OTS) provide a more useful 'quick hit' quantitative measure (but only of output, not outcome). The public relations industry must get better at proving the worth of PR in its own right, and the value of more in-depth use of research, in order to wean both practitioners and clients away from AVEs (Fairchild, 2001, p. 37).

Guidelines for Measuring and Evaluating PR Effectiveness published by the US Institute for Public Relations (2003), says:

> Most reputable researchers contend that 'advertising equivalency' computations are of questionable validity. In many cases, it may not even be possible to assign an advertising equivalency score to a given amount of editorial ...

The Institute's *Guidelines for Measuring and Evaluating PR Effectiveness* specifically add in relation to multipliers of advertising rates applied to editorial:

> Some organizations artificially multiply the estimated value of a possible editorial placement in comparison to advertising by a factor of 2, 3, 5, 8 or whatever other inflated number they might wish to come up with, to take into account their own perception that editorial space is always of more value than is advertising space. Most reputable researchers view such arbitrary 'weighting' schemes aimed at enhancing the alleged value of editorial coverage as unethical, dishonest, and not at all supported by the research literature.

Citing extensive research into multipliers and their basis, Jim Grunig (2000) concludes:

> the weightings for 'third party' endorsement are totally made up. Research does not support the idea that there is such a thing as third-party endorsement.

US researchers, Hallahan and Cameron from the University of Missouri are two of the most active PR researchers studying third-party endorsement and source credibility. They conducted an extensive search of literature on source credibility and found very little research comparing the credibility of news and advertising. The studies they did find showed no consistent advantage of news over advertising (Cameron, 1994; Hallahan, 1996; Hallahan, 1999). The impact and effect of publicity, as any sensible person should know, depends on the tone (positive or negative), messages communicated, prominence of messages, audience reach and other factors.

The Public Relations Institute of Australia (PRIA) issued a Position Paper in 1999 on research and evaluation that states:

> The PRIA does not recognise Advertising Value Equivalents (AVEs) of editorial media coverage as a reliable or valid evaluation methodology. Editorial and advertising cannot be directly compared (Research and evaluation, 1999).

The advertising industry also has condemned the use of AVEs for measuring publicity. The Advertising Federation of Australia (2001) issued a policy on AVEs stating:

> The AFA does not support the practice of using Advertising Value Equivalents (AVEs) as a measurement of editorial publicity. Well targeted, creative and strategically focussed advertising is inherently different to the editorial gained from public relations activities. Both forms of communication have their distinct benefits and cannot be benchmarked against each other ...

The Australian Association of National Advertisers (2001) has circulated a policy statement to its members which said in part:

> AANA notes that professional PR organisations including the Institute of Public Relations in the UK and leading PR academics in the US and UK have condemned the practice as "of questionable validity" and "flawed" ... AANA concurs with these views and believes this matter should be brought to the attention of members in the interests of Best Practice and to inform our members of more reliable and credible methods for evaluating PR.

A detailed paper discussing why AVEs are not a valid or reliable measurement of media publicity by Jeffries-Fox (2003) is available on the Institute for Public Relations Web site (www.instituteforpr.com).

It is concerning that, despite extensive research illustrating the fundamental practical and ethical flaws in AVEs, and unanimous academic and professional condemnation of them, PR practitioners continue to use AVEs to allegedly measure the value of publicity. In 2005, a number of leading multi-national PR consultancies were actively promoting AVE figures to their clients and making claims for the value of their work based on AVEs. If public relations wants to lift is status and reputation and become a profession, as it so often says it does, practitioners need to abandon what I called "shonky" methods in an address to the 2004 PR Measurement Summit in the US. The Americans were amused by my Australianism, but "shonky" these methods are. For those uninitiated in Australian colloquialisms, 'shonky' means of dubious integrity or honesty, unreliable, dishonest, false, misleading and sly. Public relations professional bodies should show leadership in educating PR practitioners and, in conjunction with marketing organisations, promoting valid reliable methods of evaluating PR.

Philadelphia-based Surveillance Data, Inc., the owners of PRtrak™, a Windows media analysis program discussed later in this chapter, launched a new metric in early 2005 which they call the **Media Prominence Index** (MPI) and claim that the index shows close correlations with business outcomes. Developer of PRTrak™, Angela Jeffrey says: "We learned very quickly that 'share of discussion', which is the quality and quantity of a firm's non-paid media compared to that of its competitors', was the real link between media outputs and business outcomes like sales, customer preference, etc ..." (Jeffrey, 2005).

Other metrics studied by SDI were net positive story counts, audience impressions and media values (AVEs). The company's research found that media values (AVEs) were 12.4 per cent more accurate than impressions (ie. total audience 'hits') and 25.6 per cent more accurate than simple positive story counts (ie. volume) – not surprising, given the almost total unreliability of sheer volume of media coverage or total audience to indicate impact or effects. SDI acknowledges that 'ad values' have been "misused" and says it has searched for a new metric more closely correlated

with business outcomes. But SDI's Media Prominence Index which is calculated by an algorithm based on "a nine-point tonality scale, a nine-point prominence scale, and media value" (AVE), continues to fall into the trap of assuming correlation means causation and clinging to the notion of AVEs.

Media content analysis is a specialist application of content analysis, a well-established research methodology. A recognised authority on content analysis Kimberley Neuendorf (2002) describes content analysis as "the primary message-centred methodology" (p. 9) and cites studies by Riffe and Freitag (1997) and Yale & Gilly (1988) which reported that "in the field of mass communication research, content analysis has been the fastest-growing technique over the past 20 years or so" (Neuendorf, 2002, p. 1).

Media content analysis was introduced as a systematic method to study mass media by Harold Lasswell (1927), initially to study propaganda. It became increasingly popular as a research methodology during the 1920s and 1930s for investigating the rapidly expanding communication content of movies.

In the 1950s, media content analysis proliferated as a research methodology in mass communication studies and social sciences with the arrival of television. Media content analysis has been a primary research method for studying portrayals of violence, racism and women in television programming as well as in films.

As the name suggests, media content analysis analyses the content of mass media. In discussing media evaluation, Watson and Noble (2005) emphasise their frequently stated concern about this methodology. They say: "In spite of our repeated concerns expressed ... about the limitations of media evaluation ... we enthusiastically accept that media evaluation has an important role to play". Notwithstanding, they immediately go on in the next paragraph beginning with 'however':

> However, it is equally important to understand the limitations that media evaluation has in fulfilling this role. Media evaluation is concerned with the outputs – not the results – of a public relations campaign ..." (p. 120).

Apart from repeating their concerns about media evaluation twice in two paragraphs, this statement is not entirely correct. From detailed analysis of the content of media articles, media analysts can produce descriptive information on the leading issues being reported, leading sources being quoted, the main messages being communicated to audiences, and so on. In addition, media content analysis can do more. While pointing out that inferences cannot be made as to producers' intent or audiences' interpretation from content analysis alone, and arguing that an integrated approach is required involving use of content analysis with other research such as audience studies, Neuendorf (2002) says media content analysis is useful for "facilitating" inference and, further, that it has predictive capabilities for identifying likely effects on public opinion as well as other specialist uses. Neuendorf lists four main approaches to and roles of content analysis:

- Descriptive;
- Inferential;
- Psychometric; and
- Predictive (p. 53).

While psychometric refers to specialised medical and psychoanalytic uses of content analysis for interpreting the text of patient interviews or statements, the three other approaches are highly relevant to public relations. The first and most basic role, descriptive, provides an insight into the

specific messages and images presented in mass media. The inferential and predictive roles of content analysis, even though they are 'facilitating' rather than conclusive, allow exploration of likely effects of mass media representations on audiences and on societies. Reliable predictions are possible when sufficient data are amassed and trends identified – eg. a predominance of negative messaging reaching a specific audience over an extended period of time. In such a circumstance, while not conclusive, it is highly likely that this negative content will negatively affect audience attitudes and possibly even behaviour.

Media content analysis can be undertaken *quantitatively* and *qualitatively*. By far the most popular is quantitative content analysis which calculates:

- Volume of articles;
- Volume of mentions of key issues;
- Volume of coverage of competitors or sources which can be shown as 'share of voice';
- Volume of key messages (identified by key words);
- Impressions or 'opportunities to see' (OTS) which is an estimate of total audience reached calculated from circulation or ratings statistics; and
- Reach (specific target audience penetration).

It is important to reflect on what was said about the importance of qualitative analysis in Chapter Three – "The Media" and earlier in this chapter before getting too excited about the interesting numbers that quantitative media analysis can provide. Volume of coverage and even quantity of certain messages do not necessarily create meaning. Qualitative content analysis is much harder to do, but it delves into the likely interpretation of texts by audiences. Qualitative content analysis draws on semiotics and semiological methods as well as techniques from literature analysis and discourse analysis. Qualitative analysis is heavily influenced by post-structuralist thinking such as Roland Barthes pronouncement of the 'death of the author'. The 'ethnographic turn' in social research, discussed in Chapter Three, shifted attention from authors' intentions to readers – what they interpret from texts, which may or may not be what the authors intended.

To provide inferential and predictive capabilities, media content analysis has to be conducted rigorously and, in the case of quantitative content analysis, scientifically – ie. complying with requirements for statistical reliability, validity, etc. Neuendorf (2002), Lombard, Synder-Duch and Bracken (2003; 2004) and a number of other researchers warn that much content analysis is not undertaken using valid and reliable methodology. This is particularly the case with media content analysis used in public relations.

It is not possible or appropriate in this one chapter on measurement of PR and corporate communication to go into detail on media content analysis methodology, but key points of methodology which should be carefully considered include:

- **A priori design** which, in simple terms, means the list of issues, messages and sources to be researched must be identified before research begins and not added in as you go (eg. messages added later could have been present in articles from the outset which renders data inaccurate). Issues, messages and sources to be tracked are usually established in a Coding List and detailed coders' instructions are also provided to guide the coding process;

- A **valid sample** – analysis of a small unrepresentative sample of media may produce misleading analysis. This occurs frequently in PR where media analysis for so-called global studies analyses only English language media or those available online or through a service such as Factiva (called a 'convenience sample');

- Use of **multiple coders** – while there is no such thing as true objectivity (Grbich, 2004), subjectivity should be minimised and what post-structuralists call *intersubjectivity* maximised. One key way to do this in media analysis is through use of multiple coders on each project. This helps avoid what Tinsley and Weiss (1975, p. 359) refer to as "the idiosyncratic results of one rater's subjective judgement";

- **Intercoder reliability assessment** – this is rarely if ever done in commercial media content analysis, but is an important step. As well as using multiple coders, rigorous content analysis has coders 'blind' code a sub-sample of articles coded by another coder and results are compared. A range of variance/covariance indices are used for this. Coding should only proceed if high consistency is achieved. Otherwise, re-briefing and/or retraining should be undertaken.

In analysing media articles, content analysis experts typically look at a wide range of variables. The primary units of analysis are most typically **messages**. Both positive and negative messages should be tracked. If an organisation has a list of positive messages it is trying to communication, the easiest way to balance the analysis is to concurrently track the opposite of positive messages desired. In addition to messages, content analysis usually tracks **issues** (subjects or topics identified by key words or phrases) and sources. Furthermore, to try to identify the likely impact (effect) of media articles, in-depth content analysis takes into account:

- **Media type**, with weightings or additional points for high circulation, high rating or highly influential media;

- **Prominence**, recording impact factors such as page number or order in an electronic media bulletin and use of photos or visuals;

- **Positioning** such as headline mentions, first paragraph mentions, prominent mentions, or passing mentions;

- **Size** of articles or length of a radio or TV segments;

- **Share of voice** of various sources quoted (supportive and opposing);

- The **position/credibility** of key sources (eg. an official government authority or known expert is likely to be more credible than a little known unqualified source).

Some commercial suppliers of media content analysis claim that qualitative and quantitative content analysis can be fully automated using computer technology to scan texts and identify key words which can be categorised and rated in terms of their positivity or negativity or 'tone'. Neuendorf (2002) says that "the notion of the completely 'automatic' content analysis via computer is a chimera … The human contribution to content analysis is still paramount" (p. 40).

This is not to be Luddite and say that computers cannot be used in media content analysis. They are extensively used in most content analysis. In particular, computers databases are vital for storing large quantities of data and programs such as SPSS (Statistical Package for the Social Sciences) and Microsoft Excel are widely used for cross-tab analyses, pivot tables, chart generation, and so on.

But PR practitioners should be wary of companies claiming that they can fully automate media content analysis. Most likely they are talking about basic quantitative analysis. Or they are using short-cut methodologies relying on simple key word searches matched to dictionaries set up in their

system and simplistic binary ratings (eg. positive/negative). Even with artificial intelligence systems and new types of software that 'learns' as it operates, computers fail to comprehend nuance in language and struggle with colloquialisms and other figures of speech that communicate meaning to humans beyond the literal interpretation of words. Furthermore, beyond the need for the human element to try to identify how other humans would interpret and react to various texts, human analysts write conclusions and provide recommendations based on a briefing and understanding of your objectives and strategy. Computers cannot provide conclusions and strategic advice – not yet anyway.

Figure 26 provides a sample media analysis chart which reports the volume of media coverage gained by each of six leading car manufacturers, broken down by the proportion of favourable, unfavourable and neutral coverage, as well as an average 'favourability rating' reported in the red line and overall ratings. Different media analysis companies use different methodologies. In this chart produced by CARMA International, the favourability rating is an aggregate score derived from rating multiple variables as outlined on the previous page for each article expressed on a 0-100 scale where 50 denotes neutral. A 0-100 scale and charts of this nature are very familiar in the 'language of the dominant coalition'.

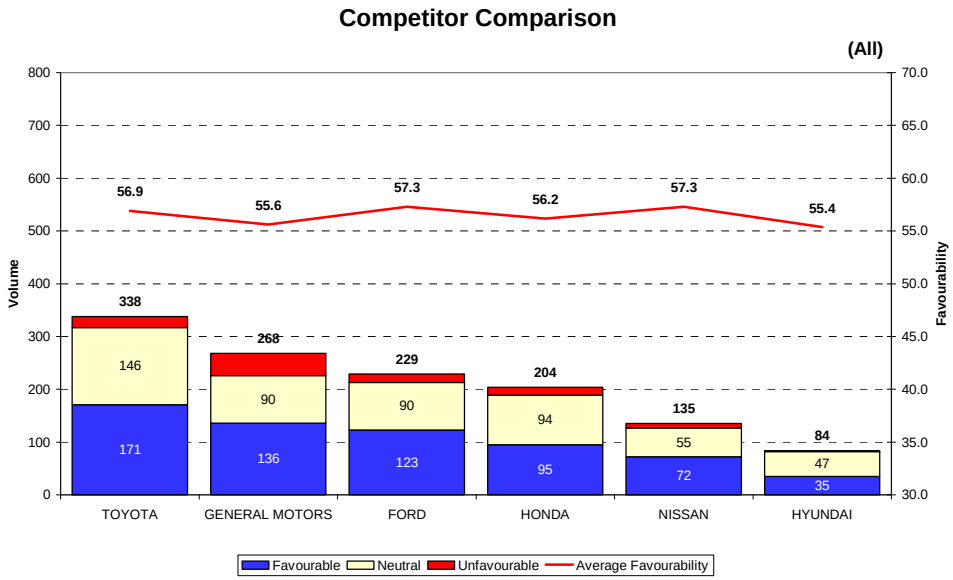

***Figure 26**. Sample chart from media content analysis showing volume and favourability of media coverage. (CARMA International, 2004).*

Figure 27 provides another sample media analysis chart showing leading messages – positive and negative. Qualitative information such as the most frequent messages reaching target audiences is more important than basic quantitative data on the volume of articles or number of mentions, or even impressions (total audience reached).

A number of research companies offer media content analysis services. In the UK, there are 15-20 media content analysis firms listed as members of the Association of Media Evaluation Companies (AMEC) including Echo Research, Millward Brown Precis and CARMA International, while in the US there are several large firms including CARMA International and Delahaye. Sweden's AB Observor Group, one of the world's largest media monitoring firms, acquired Delahaye from Medialink in late 2004 so, in addition to a number of local European media analysis firms, this group will no doubt offer media analysis across Europe as well as in other markets in future.

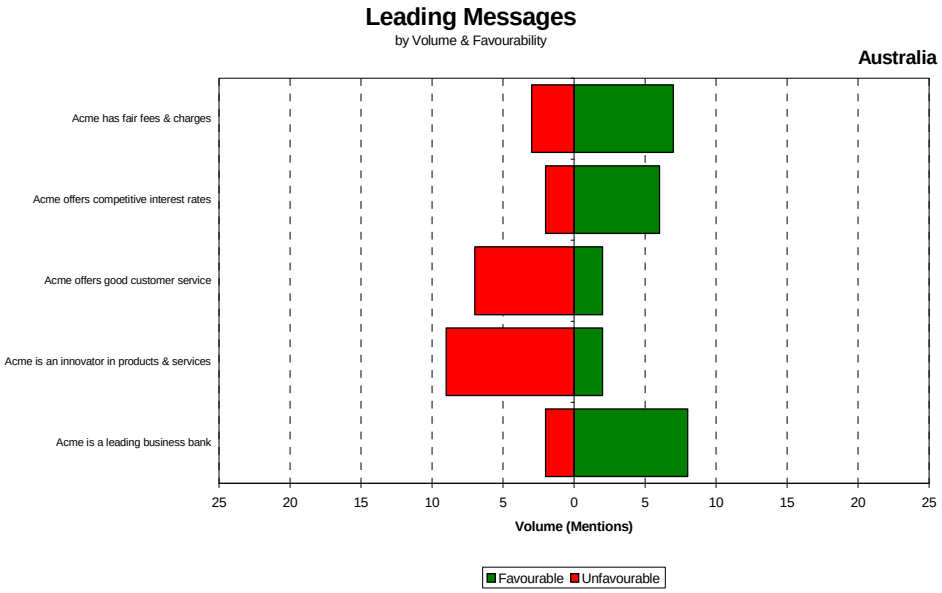

Figure 27*. Sample chart from media content analysis showing leading favourable and unfavourable messages. (CARMA International, 2005).*

In Asia Pacific, as at mid-2005, only CARMA International had a physical presence regionally, including multi-lingual analysis capabilities, although some other international firms claim local affiliates and there are a few local companies providing media analysis in Australia and Singapore.

Media analysis firms provide a fully outsourced service. Costs vary, usually dependent on the number of articles for analysis, but can be quite reasonable compared with other specialist research. For instance, a project to analyse 500 media articles and produce a written report with 10-12 charts, tables of key data, and analysts' conclusions and recommendations for one country can be obtained for between $4,000 and $5,000. To obtain a report across multiple countries involving thousands of articles can range from $10,000 to $25,000 or more.[2]

Only companies in a crisis tend to outsource media analysis monthly. The most common frequency of reporting is quarterly. So the above rates suggest annual budgets from as low as under $20,000 to $100,000 and more. Some PR practitioners may suck breath at even the lower of these figures, but bear in mind that just one market research survey is likely to cost anywhere from $40,000 to $80,000.

In addition, further supporting the point that measurement of PR can be undertaken with a low budget, there are also simple software programs available for do-it-yourself media content analysis. These will not provide the depth of analysis that specialist research firms do – this should be obvious – and they lose the advantage of independence. However, they can provide some level of analysis quickly for low cost. In the US, **PRTrak**™, originally developed in Houston, Texas before being purchased by Surveillance Data, Inc. (SDI). PRTrak™ and then on-sold to VMS, includes Advertising Value Equivalent calculations – a measure that SDI CEO Gary Ghetto still argues is valid – and it only includes media for North America. But the company is continuing to develop its do-it-yourself offering and in 2005 introduced a Media Prominence Index which attempts to provide a single metric reflect quantitative and qualitative characteristics of media publicity.

[2] US dollars quoted.

MASS Communication Group, purchased by Media Monitors in 2006, developed **MEDIAudit®** in 1999 and an updated Version 2.0 was released in 2002. A new Web version is to be released by Media Monitors in 2010. MEDIAudit® does not provide AVEs by management decision. Instead, after some basic simple data entry about each article, it auto-generates six charts showing coverage by media (volume of articles and percentage); article type breakdown (features, news, editorials, etc); positive and negative messages; 'share of voice' of competitors or sources tracked; target audience reach; and market breakdown for multi-country analyses.

A key feature of MEDIAudit® is that versions are available for the US and Canada, UK and Europe, Asia Pacific including all major Asian countries, and the Middle East and Africa. The program contains inbuilt media lists and circulation figures for each country and these are automatically selected from a dropdown menu and used in calculations of reports. Media lists are not 100 per cent complete in some countries such as China, but users can add media themselves.

Originally part of MASS COMaudit®, a CD suite of PR measurement tools, MEDIAudit®, has been rated by *The Measurement Standard* as follows:

> The most useful off-the-shelf measurement software available today, MASS COMaudit® is a powerful and comprehensive suite of research and evaluation tools. This software contains all you need to undertake effective evaluation of PR and communication including MASS MEDIAudit®, 10 PROforma survey questionnaires, and 'how to' tips and guidelines
> (Katherine Paine, *The Measurement Standard*, USA, 2002).

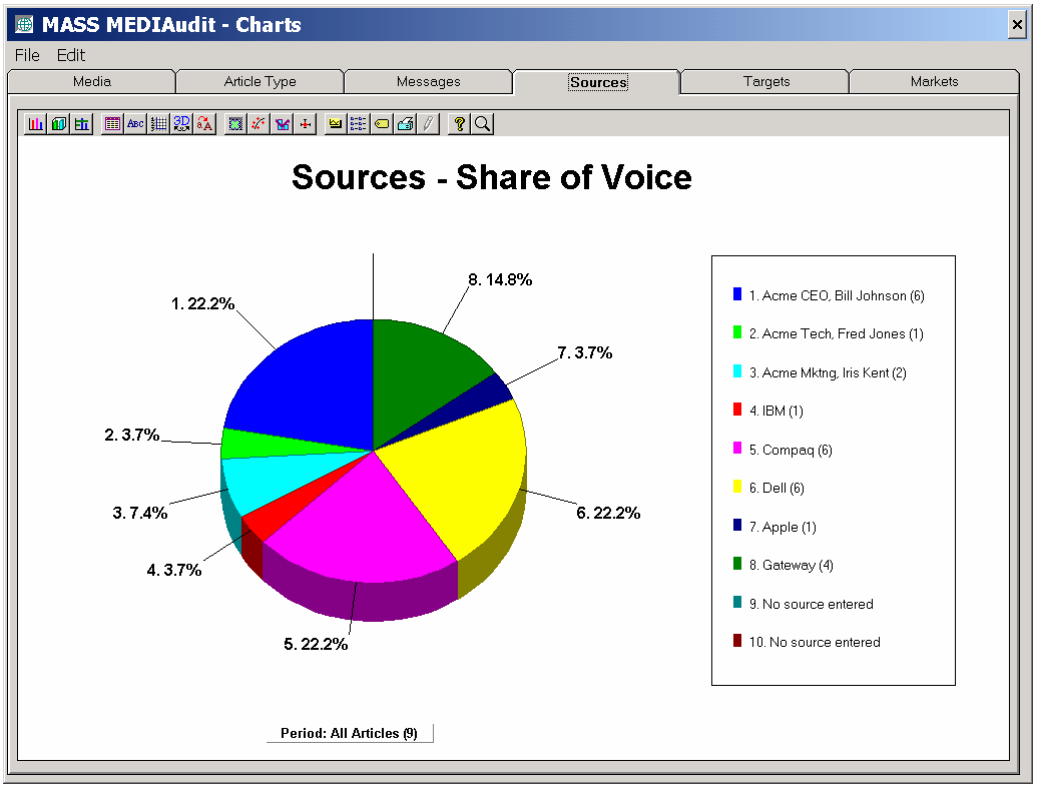

***Figure 28**. Sample chart from MASS MEDIAudit®, a Windows media analysis software program produced by MASS Communication Group (www.masscom.com.au).*

Media content analysis can be used not only for evaluating an organisation's own coverage. The media report on competitors, issues and trends, providing a vast database of information that media

content analysis can 'data mine'. John Naisbitt demonstrated in his popular book, *Megatrends*, that media content analysis can provide valuable insights into what is likely to be on the public agenda in the future (as cited in Cutlip, Center & Broom, 1985, p. 215).

Paul Noble (1995) argues that "media evaluation is not the answer to the evaluation of public relations programs as a whole, although one might be tempted to think otherwise given some of the hyperbole surrounding it". However, he acknowledges that "media evaluation does have a very positive role to play …" (p. 1). I agree with Paul. This handbook has focussed on many communication methods through the preceding chapters and the remainder of this chapter looks at other research methods. The MASS software also recognises the multi-faceted nature of PR and corporate communication by providing a suite of survey questionnaires and 'how to' advice which includes guidelines on conducting interviews, focus groups and surveys as well as a media analysis program.

Surveys

Surveys are one of the most commonly used research instruments, employed for market research, customer satisfaction studies and social research. Customised surveys can be used in PR and corporate communication to:

- Evaluate awareness levels among key groups;
- Gain insights into attitudes and perceptions held within key groups;
- Identify the interests, needs and preferences of target audiences.

Furthermore, at a *micro* level, surveys can be used to evaluate the effectiveness of PR activities including:

- Publications (reader surveys);
- Events (audience surveys);
- Presentations (audience surveys);
- Employee communication (internal surveys);
- Shareholder communication (shareholder surveys);
- Member communication in organisations (member surveys);
- Intranet, extranet or Web sites (online surveys);
- Community relations programs (local community surveys).

In all of the above, surveys can be done before and after and/or at certain intervals, providing a basis for both strategic planning and measurement of *out-takes* and *outcomes*.

Figure 29 presents a chart reporting the findings of three key questions from an internal survey done by a company undergoing a major restructuring. The PR/corporate communication team was asked to persuasively communicate the restructuring to employees to gain their understanding of it (awareness), support and 'buy in'. A survey was conducted in 2000 one week after announcement of the restructuring and then repeated 12 months later. It showed a quite substantial increase in awareness and also in stated support. The third question (right columns) is probably the most significant finding. Charged by management to gain 'buy in' and engagement by employees, a question was asked: "Do you prefer the new structure to the old structure". At the time of announcing the new structure, only five per cent of employees preferred it. One year later, after extensive internal communication, almost 70 per cent said they preferred the new structure.

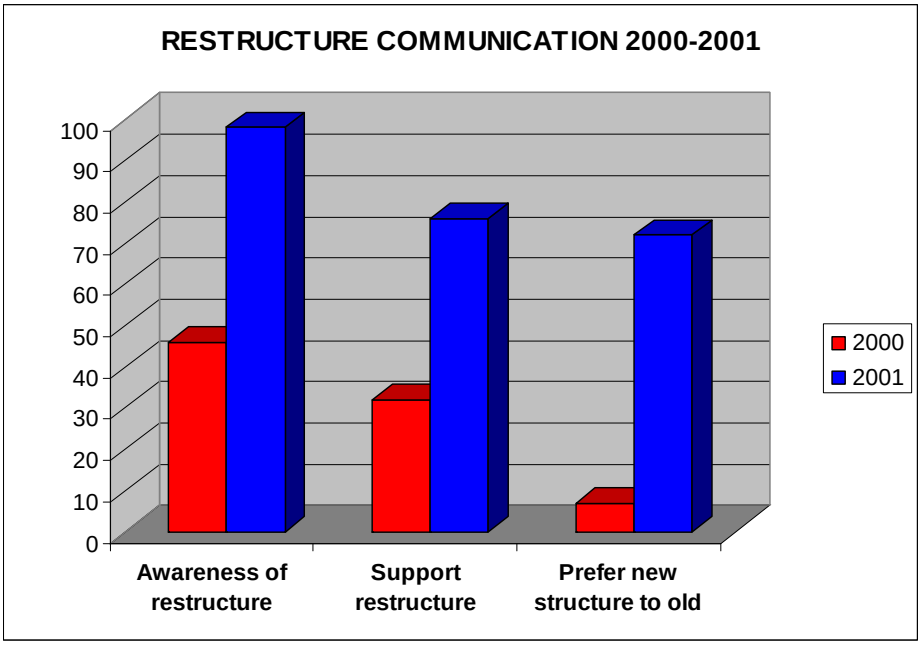

***Figure 29**. Survey results comparing before and after communication campaign to promote company restructuring internally.*

With the proliferation of e-mail and growing use of the Web, **e-surveys** are revolutionising research and lowering costs by eliminating printing of questionnaires, reply-paid postage costs and partly automating data entry. Distributed by either e-mail or on Web sites, e-surveys utilise interactive questionnaires into which respondents directly enter their responses. In sophisticated examples, data is automatically collated in servers when respondents click 'Submit'.

As well as costing much less than equivalent 'dead tree' surveys, e-surveys generally gain faster responses, and time taken in data entry and collation in dramatically reduced with automated systems. However, advanced programming skills are needed to design e-surveys. Therefore, outside professional help will normally be required.

Nevertheless, surveys can be self-administered if budget is not available to engage a professional research firm or consultant. Many areas of measurement do not require high statistical reliability. For instance, if you are trying to measure the effectiveness of an event, a simple feedback form with a few questions can find out what attendees took out of the event, how they rated it and whether they would come again (a good gauge of whether it was worthwhile). For simple surveys of employees, readers of publications, attendees of events, and so on, it is a good idea to drop the term 'survey' in place of the more user friendly **feedback form**. It can still be a structured questionnaire and even be designed with boxes to tick, but a simple self-administered survey/feedback form can be used widely to measure audience impact and effects.

In implementing surveys, the two key issues in planning are:

1. **Sample**; and

2. **Questionnaire** construction and design.

The best advice in relation to sampling is avoid it if possible. If you are dealing with a small or moderately sized group, survey *all* of the population[3]. This is called a *census*. Sampling can be complex and many methods require detailed statistical calculations. If you do have to sample, the main methods are:

- **Random** – relatively simple as it selects every nth person in a population, but may not yield a sample that is representative of a group and sub-groups in it (eg. it may result in 70 per cent men and only 30 per cent women);

- **Representative** or **quota** – a more sophisticated method where particular groups can be segregated and samples drawn from each to ensure the total survey base represents the population;

- **Purposive** – a technique for use where there is a defined purpose or objective. For instance, if the survey is to identify customers' satisfaction and attitudes, it may be decided to focus on large high-value customers. In this instance, customers with purchases over a defined value may be purposively selected.

It is important that survey questionnaires are well constructed using question techniques that are reliable and also which yield the most useful data. This handbook cannot hope to cover the many issues for consideration in writing questions. It is strongly recommended that professional research expertise is employed or at least advice is sought in this process.

Home-made surveys prepared and conducted by executives or staff without research expertise can result in unreliable data. For instance, too many surveys use four-point scales which are largely invalid (eg. Excellent, Good, Poor, Very Poor). By not providing a middle position, this scale forces respondents who want to say 'average' to mark either higher or lower than they feel, thus distorting the result one way or the other, or both.

Likert scales, named after the person who first developed them, most commonly use a five-point scale such as 1-5 for Excellent; Good; Average; Poor; Very Poor. Variations can include: Always; Most of the time; Occasionally; Not often; Never. Seven-scales are preferred by some researchers as they provide a more precise rating. However, they are slightly more difficult and slower for respondents to answer, a factor which must be considered in all survey questionnaire construction. Also, here is another very practical tip. Five-point scales can be converted easily to 10 scales or even up to 100 scales in reporting data. For instance, if you want to calculate an average rating overall for employee satisfaction with internal communication, a five-point Likert scale could ask each employee to rate from Excellent to Very Poor. Then answers could be scored as:

- Excellent 5 points
- Good 4 points
- Average 3 points
- Poor 2 points
- Very poor 1 point.

By adding up the points for all responses and dividing by the number of respondents, an average score can be calculated. And it can be easily turned into a score out of 10 by multiplying by two. The result could be an average score of 6.9 on a 10 scale, providing a benchmark for later

[3] 'Population' in research is a term used for the total number of people within a target group – not the population generally.

comparison. Converting a seven-scale to a more understandable 10 scale or 100 scale is much more difficult.

Other frequently used types of research questions include **multiple choice**, **rankings**, **semantic differentials** and **yes/no** choices. The latter are not used often as they provide little information, although there are occasions where they are important. Before leaving you with a recommendation to read up on surveys if you plan on doing them yourself, it is worth mentioning the importance of rankings.

Let's take a practical example to illustrate. A common requirement in many PR and corporate communication questions is to identify the communication activities or media that are most effective and most required by an audience and those that are not working. One way to do this in a survey is to list the main communication activities or media used and ask respondents to indicate which ones they prefer or find most useful. But, simply asking them to indicate (eg. by ticking a box) may result in many respondents ticking many or even all boxes. You are then none the wiser about what you should focus on. A better approach is to ask respondents to rank the communication activities or media in order of usefulness or preference from their point of view. For instance, a question could say:

Q. In the list of communication activities and materials, please rank the ones most useful to you. (Write 1 in the box for the most useful down to 10 for the least useful)

CEO briefings	☐
Staff intranet	☐
Company's Web site	☐
Printed newsletter	☐
Weekly bulletins	☐
Face to face meetings with your managers or supervisors	☐
'New Era' video	☐
Annual staff conference	☐
Local office events	☐
Other (Please specify)	☐

This discussion has only scratched the surface in relation to surveys, but it shows the important information that they can provide. Importantly, if sufficiently large and valid samples are used, surveys provide quantitative as well as some qualitative information. In other words, they give you percentages and numbers to quantify your results.

Interviews

Interviews are a valuable method of research for both planning and evaluating and can be used with a wide range of stakeholder groups. Clearly, the main limitation of interviews is the demand on time – for both the interviewer and interviewee. Each interview may take anywhere from 15 minutes to one hour. Thus, interviews are mostly used for *qualitative* research with small sample sizes, not quantitative, as the volume of interviews required for statistically valid samples would entail many weeks of interviewing.

Interviews are particularly relevant to high-level stakeholders where it would not be appropriate to send them a survey questionnaire – for instance, politicians, senior officials in government, large shareholders, business partners, and sometimes journalists.

A benefit of interviews is that they can obtain more in-depth information than a survey questionnaire in most cases. Interviewee responses can be followed up, clarified, amplification sought, and interviewees have more opportunity to open up and speak freely, especially in open-end questions or informal discussion.

Analysis of interviews can be time consuming if there is a substantial amount of open-end discussion. Therefore, most interviews involve a combination of closed-end and open-end questions. It is recommended that you use a questionnaire similar to a survey questionnaire for closed-end questions. This not only helps keep you on track but it ensures that the same questions are asked of each interviewee and provides some structure to facilitate analysis of data.

Like most other research methods, interviews can be conducted before and after communication campaigns or projects to identify changes.

Focus Groups

Focus groups are similar to interviews, but with a small group of respondents instead of a single interviewee. Like interviews, focus groups provide qualitative information drawn from small representative groups of people.

Usually focus groups are conducted with 10-15 participants. Larger numbers result in 'group think' and some participants not getting to express their views in the allotted time, while fewer than 10 participants can lead to self-consciousness.

There is no fixed number of focus groups that should be conducted. This decision is usually based on segmentation – ie. ensuring that groups from different segments of the target population are researched. For instance, if a company doing internal focus groups with employees has blue collar workers in factories, white collar workers in head office, and two regional offices, it is desirable to conduct four focus groups to gain views from each segment.

Focus groups are facilitated by a **moderator**, preferably an independent person. Moderators have an important role in focus groups to ensure that some individuals do not dominate and to draw out the 'shrinking violets', as well as keep the discussion flowing smoothly. Moderators are usually trained in psychology or other areas of the social sciences.

A benefit of conducting research with small groups is that the method often prompts discussion between participants, rather than relying only on the interviewer's questions. A comment by one participant may prompt others to recall something or provide their point of view – either agreeing or disagreeing. This discussion component is useful for testing the validity of views and, while focus groups do not provide quantitative data, for establishing whether views are broadly representative or isolated opinion. For instance, after hearing a participant's view, a moderator can ask the group whether others feel that way as well.

A simple description of the difference between quantitative and qualitative data is:

> *Qualitative* information tells you WHAT people think and WHY;
> *Quantitative* information tells you HOW MANY think that way.

Many communicators ask how you know which one to use first, or when do you use each one? The above shorthand explanation gives the answer. If you already know what people think and why, you probably do not need more qualitative research. If you are aware of what people think, but do not know for sure how many think that way (ie. is it a majority view or just a vocal minority?), you

should proceed immediately to quantitative research. However, if you do not know what people think or why, it is difficult or impossible to write a survey questionnaire. In this instance, you should do qualitative research first to gain an understanding of the 'what' and 'why'.

Sometimes, quantitative research throws up findings that you do not understand – eg. 70 per cent of employees rate a company's communication as poor. In this case, qualitative research may follow quantitative to gain further in-depth understanding of why they feel this way.

There are many other types of research and research methodologies. But these are some of the main methods relevant to PR and corporate communication. Further information can be obtained on each from books specifically dealing with research such as market research or social research (eg. Neuman, 1997, *Social research methods: qualitative and quantitative approaches*).

The ethics of research and evaluation

It may seem out of context for ethics to be discussed in relation to research and evaluation. But there are major ethical issues at both a philosophical and methodological level in research and evaluation.

At a philosophical level, PR and corporate communication practitioners make recommendations to their employers and clients every day proposing expenditure of hundreds of thousands or sometimes millions of dollars, and suggesting changes to the strategic direction of companies and organisations. As has been shown, this is done with little or no research basis in many cases. Furthermore, when recommendations are accepted, programs are often implemented with scant tracking and measurement to determine whether they are effective.

Is that responsible? Is that moral? Is that ethical?

To glibly commit shareholders' or taxpayers' funds to programs and campaigns based only on intuition and personal experience, without an objectively researched basis to recommendations and rigorous evaluation of the effectiveness of expenditure and activities, has to be viewed as highly questionable from an ethical standpoint.

At a methodological level, when research is conducted, it needs to be undertaken with rigour and integrity. Presenting misleading or erroneous data intentionally is unethical by most standards. However, doing so through ignorance and failure to consult readily available literature or seek advice is also ethically questionable.

A research culture needs to be developed in PR and corporate communication, applying informal and formal research tools systematically and rigorously as part of professional communication practice, and 'smoke and mirrors' methods such as Advertising Value Equivalents using 'credibility multipliers' should be avoided.

Pressure from clients and employers is cited in defence of invalid and simplistic evaluation methodologies. "My client wants it" or "my boss likes to see dollar values" are common justifications for AVEs and other such evaluation shortcuts. However, it is not acceptable for accountants to falsify tax returns because their clients exert pressure to reduce their taxation, or for lawyers to arrange for witnesses to lie in court because their clients pressure them to prove their innocence? Such behaviour from professionals is widely viewed as unacceptable and public relations needs to set and meet no less standards if it is to become and be recognised as a profession and gain credibility and respect.

The benefits of using planning research and evaluation

If implemented in a 'from the ground up' continuous way, planning research and evaluation offer major benefits to PR and corporate communication practitioners in their pursuit of professionalism and acceptance as part of senior management, as well as at a practical level in gaining adequate budgets and support.

Australian marketing writer, Neil Shoebridge (1989) said in a column in *Business Review Weekly*: "For public relations to be widely accepted as a serious marketing tool, it needs to develop new ways to prove its worth and make its actions accountable ... pointing to a pile of press clippings is not enough."

The importance of research in gaining access to senior management and having influence in organisational decision-making is iterated in the following quote by James A. Koten, then Vice-President for Corporate Communications at Illinois Bell:

> To be influential, you have to be at the decision table and be part of corporate governance. You can be there if the things you are doing are supported by facts. That is where the public relations person has generally been weak and why, in most organisations, public relations functions at a lower level. The idea is to be where the decisions are made in order to impact the future of the company. To do so, you have to be like the lawyer or financial officer, the personnel officer or operations person. You have to have hard data (Dozier, 1986, p. 2).

Dozier (1986) concludes:

> The power-control perspective suggests that public relations program research is a tool – a weapon perhaps – in the political struggle to demonstrate the impact of public relations programs and to contribute to decision-making ... Success in this … means greater financial and personnel resources for the public relations unit and greater power over decisions of the dominant coalition (p. 2).

A 1985 survey of Public Relations Society of America (PRSA) and International Association of Business Communicators (IABC) members in the US and Canada showed that scanning research is positively associated with participation in management decision-making and membership of the dominant coalition" (Dozier, 1990, p. 19).

Key Performance Indicators (KPIs), Benchmarking and Balanced Score Cards

As well as providing practitioners with valuable data for planning, measurement provides vital metrics for implementing Key Performance Indicators (KPIs) or Key Results Areas (KRAs), benchmarking, and other modern management reporting techniques such as Balanced Score Cards.

Many companies and organisations, and even government agencies, are introducing these measurement systems organisation-wide. Often, PR and corporate communication is unable to comply. Many communicators try to avoid KPIs and other such measurement systems, arguing they are not possible or not relevant to PR. Rubbish! Not only can they be used, but there are major advantages for PR and corporate communication in working within systems that apply to other departments and business units. If your organisation has introduced one of these systems, embrace it. By producing data in a system that everyone in the organisation is using, you will bring PR into the mainstream and show tangible results in a form that they understand. You will be talking the language of the dominant coalition. But, of course, rigorous and regular measurement is mandatory to produce the metrics for KPIs or Balanced Score Cards.

KPIs or Balanced Score Card systems of reporting and measurement do not involve new or additional forms of measurement. They are simply ways of collecting measurement data and presenting it in an organisation-wide format. The research methodologies outlined in this chapter – response mechanisms, media content analysis, surveys, interviews, etc – are those which practitioners can use to generate data (metrics) for KPIs or Balanced Score Cards.

Two key points on measurement are very important in terms of practicality and specifically relevant to KPIs, KRAs and scorecards.

- Even though we have looked at measurement at every stage of PR and communication, **you do not have to measure everything**; and
- While it is important to have a 'menu of methodologies' or 'cluster of technologies' as outlined in this chapter , **you do not have to use each measurement method and tool available**.

By their very nature, KPIs focus on KEY performance INDICATORS. Think of the dashboard of a car. There are usually just four or five dials or gauges. These report information that is agreed among engineers and drivers to provide the most important and relevant indicators. There are thousands of functions that could be measured in an average car – the temperature of the rear wheel bearings, the vibrations of the drive shaft, the air pressure in the boot (trunk for Americans). And no doubt there is technology that could measure all these things. But we usually stick to four or five key measurements displayed on our car's dashboard to be realistic and practical.

My reference to cars is not simply an indulgence in one of my personal interests. The concept of **dashboards** is, in fact, coming into popular usage in PR and corporate communication measurement. Some organisations and some research firms are specifically presenting measurement information in a cluster of charts or numbers on a screen as a corporate dashboard.

You should select key criteria to measure and choose methodologies that produce indicators that will be reliable and understood by management. Most companies and organisations adopt three to five KPIs. But, as in the case of setting objectives, you should not select these in isolation. What you measure – your KPIs – must be agreed by management. It has to include indicators that they understand and recognise as important.

KPIs selected should also include at least some outcome indicators – not simply input or output indicators. But, because outcomes may some time to achieve, it is practical to include a mix of output measures and outcomes measures in KPIs or on a Balanced Score Card.

Balanced Score Card systems use a similar approach. Like our scorecards from school, certain subjects or areas are tracked and a summary presented. A lot of money is being made by consultants specialising in Balanced Score Cards, but they are essentially measurement with the one important additional concept of seeking balanced performance across an organisation. Balanced scorecards suggest that a company has to not only perform well financially, but it has to exhibit good environmental performance, good community relations, good employee relations, etc to perform well long term. This measurement concept originated from **Triple Bottom Line** thinking as advanced by Charles Fombrun and others.

Used the way it has been outlined in this chapter, measurement is one of the keys to the boardroom door for PR and corporate communication.

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