

# Appendix C

## Guidelines and Standards for Measuring and Evaluating PR Effectiveness

### The Institute for Public Relations Research and Evaluation

#### GETTING SPECIFIC: STANDARDS FOR MEASURING PR OUTPUTS

There are many possible tools and techniques that PR practitioners can utilize to begin to measure PR *outputs*, but there are the four that are most frequently relied on to measure PR impact at the *output* level: Media Content Analysis, Cyberspace Analysis, Trade Show and Event Measurement, and Public Opinion Polls.

#### I. Media Content Analysis

This is the process of studying and tracking what has been written and broadcast, translating this qualitative material into quantitative form through some type of counting approach that involves coding and classifying of specific messages.

Some researchers and PR practitioners in the U.S. refer to this as “Media Measurement” and/or “Publicity Tracking” research. In the United Kingdom, the technique is often referred to as “Media Evaluation;” and in Germany as “Media Resonance.” Whatever the terminology used to describe this particular technique, more often than not its prime function is to determine whether the key messages, concepts, and themes that an organization might be interested in disseminating to others via the media do, indeed, receive some measure of exposure as a result of a particular public relations effort or activity.

The coding, classifying, and analysis that is done can be relatively limited or far-reaching, depending on the needs and interests of the

organization commissioning the research. More often than not, Media Content Analysis studies take into consideration variables such as these:

**Media Vehicle Variables**, such as date of publication or broadcast frequency of publication or broadcast of the media vehicle, media vehicle or type (i.e., whether the item appeared in a newspaper, magazine, a newsletter, on radio, or on television), and geographic reach (i.e., region, state, city, or ADI markets in which the item appeared).

**Placement or News Item Variables**, such as source of the story (i.e., a press release, a press conference, a special event, or whether the media initiated the item on their own), story form or type (a news story, feature article, editorial, column, or letter to the editor), degree of exposure (i.e., column inches or number of paragraphs if the item appeared in print, number of seconds or minutes of air time if the item was broadcast), and the story's author (i.e., the byline or name of the broadcaster).

**Audience or "Reach" Variables.** The focus here usually is on total number of placements, media impressions, and/or circulation or potential overall audience reached—that is, total readers of a newspaper or magazine, total viewers and listeners to a radio or television broadcast. The term "impressions" or "opportunity to see" usually refers to the total audited circulation of a publication. For example, if *The Wall Street Journal* has an audited circulation of 1.5 million, one article in that newspaper might be said to generate 1.5 million impressions or opportunities to see the story. Two articles would generate 3 million impressions, and so on. Often more important than impressions is the issue of whether a story reached an organization's target audience group by specific demographic segments. These data often can be obtained from the U.S. Census Bureau or from various commercial organizations, such as Standard Rate and Data Services. In addition to considering a publication's actual circulation figures, researchers often also take into consideration how many other individuals might possibly be exposed to a given media vehicle because that publication has been routed or passed on to others.

**Subject or Topic Variables**, such as who was mentioned and in what context, how prominently were key organizations and/or their competitors referred to or featured in the press coverage (i.e., were companies cited in the headline, in the body copy only, in both, etc.), who was quoted and how frequently, how much coverage or "share of voice" did an organization receive in comparison to its competitors, what issues and messages were covered and to what extent, how were different individuals and groups positioned—as leaders, as followers, or another way?

**Judgment or Subjective Variables.** The focus here usually is on the stance or tone of the item, as that item pertains to a given organization and/or its competitors. Usually, tone implies some assessment as to whether or not the item is positive, negative, or neutral; favorable, unfavorable, or balanced. It is extremely important to recognize that measuring

stance or tone is usually a highly subjective measure, open to a possibly different interpretation by others. Clearly defined criteria or ground rules for assessing positives and negatives—and from whose perspective—need to be established beforehand in order for stance or tone measures to have any credibility as part of Media Content Analysis.

“Advertising Equivalency” is often an issue that is raised in connection with Media Content Analysis studies. Basically, advertising equivalency is a means of converting editorial space into advertising costs, by measuring the amount of editorial coverage and then calculating what it would have cost to buy that space, if it had been advertising.

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 coverage (e.g., many newspapers and/or magazines do not sell advertising space on their front pages or their front covers; thus, if an article were to appear in that space, it would be impossible to calculate an appropriate advertising equivalency cost, since advertising could never ever appear there).

Some organizations artificially multiply the estimated value of a “possible” editorial placement in comparison to advertisement 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. Although some studies have, at times, shown that editorial coverage is sometimes more credible or believable than advertising coverage, other studies have shown the direct opposite, and there is, as yet, no clearly established consensus in the communications field regarding which is truly more effective: publicity or advertising. In reality, it depends on an endless number of factors.

Sometimes, when doing Media Content Analysis, organizations may apply weights to given messages that are being disseminated, simply because they regard some of their messages as more important than others, or give greater credence (or weight) to an article that not only appears in the form of text, but also is accompanied by a photo or a graphic treatment. Given that the future is visuals, organizations are more and more beginning to measure not only words, but also pictures.

It should be noted that whatever ground rules, criteria, and variables are built into a Media Content Analysis, whatever “counting” approaches are utilized to turn qualitative information into quantitative form, it is important that all of the elements and components involved be clearly defined and explained up front by whoever is doing the study. The particular system of media analysis that is applied and utilized by one researcher

should—if a second researcher were called in and given the same brief and the same basic criteria pertaining to the aims of the study—result in broadly similar research findings and conclusions.

## 2. Cyberspace Analysis

Increasingly, a key measure of an organization's image or reputation and of how that organization might be positioned is the chatter and discussion about that organization in cyberspace—specifically, in chat rooms, forums, and new groups on the World Wide Web. The same criteria used in analyzing print and broadcast articles can be applied when analyzing postings on the Internet.

What appears in print is frequently commented about and editorialized about on the Web. Therefore, one component of *PR output* measurement ought to be a review and analysis of Web postings.

In addition, a second *output* measure of cyberspace might be a review and analysis of Website traffic patterns. For example, some of the variables that ought to be considered when designing and carrying out Cyberspace Analysis might include deconstructing "hits" (i.e., examining the requests for a file of visitors to the Internet), a review of click-throughs and/or flash-click streams, an assessment of home page visits, domain tracking and analysis, an assessment of bytes transferred, a review of time spent per page, traffic times, browsers used, and the number of people filling out and returning feedback forms.

Best practices for this type of research are covered in "Getting Started On Interactive Media Measurement," available from the Advertising Research Foundation, 641 Lexington Avenue, New York, NY 10022, and "Hits Are Not Enough: How to *Really* Measure Web Site Success," prepared by *Interactive Marketing News* and available from Phillips Business Information, Inc., 1201 Seven Locks Road, Potomac, MD 20854.

## 3. Trade Shows and Event Measurement

Frequently, the intent of a public relations programs or activity is simply to achieve exposure for an organization, its products or services, through staging trade shows, holding special events and meetings, involvement in speakers' programs, and the like.

For shows and events, obviously one possible *output* measure is an assessment of total attendance, not just an actual count of those who showed up, but also an assessment of the types of individuals present, the number of interviews that were generated and conducted in connection with the event, and the number of promotional materials that were distributed. In addition, if the show is used as an opportunity for editorial visits, one can

measure the effectiveness of those visits by conducting a content analysis of the resulting articles.

#### 4. Public Opinion Polls

Although most surveys that are designed and carried out are commissioned to measure *PR outcomes* rather than *PR outputs*, public opinion polls are often carried out in an effort to determine whether or not key target audience groups have, indeed, been exposed to particular messages, themes, or concepts and to assess the overall effectiveness of a given presentation or promotional effort. For example, conducting a brief survey immediately following a speech or the holding of a special event to assess the short-term impact of that particular activity would constitute a form of *PR output* measurement.

### GETTING SPECIFIC: STANDARDS FOR MEASURING PR OUTCOMES

Just as there are many tools and techniques that PR practitioners can utilize to begin to measure *PR outputs*, there also are many that can be used to measure *PR outcomes*. Some of those most frequently relied on include surveys (of all types), focus groups, before-and-after polls, ethnographic studies (relying on observation, participation, and/or role playing techniques), and experimental and quasi-experimental research designs.

Best practices for both qualitative and quantitative research are covered in the Advertising Research Foundation's two documents: "Guidelines for the Public Use of Market and Opinion Research" and the *ARF Guidelines Handbook: A Compendium of Guidelines to Good Advertising, Marketing and Media Research Practice*. Both are available from the Advertising Research Foundation, 641 Lexington Avenue, New York, NY 10022.

Ultimately, one intent of public relations is to inform and persuade key target audience groups regarding topics and issues that are of importance to a given organization, with the hope that this will lead those publics to act in a certain way. Usually, this involves four different types of *outcome* measures: Awareness and Comprehension Measurements, Recall and Retention Measurements, Attitude and Preference Measurements, and Behavior Measurements.

#### I. Awareness and Comprehension Measurements

The usual starting point for any *PR outcome* measurement is to determine whether target audience groups actually *received* the messages directed at them, paid *attention* to them, and *understood* the messages.

Obviously, if one is introducing a new product or concept to the marketplace for the first time—one that has never been seen or discussed before—it is reasonable to assume that prior to public relations and/or related communication activities being launched, that familiarity and awareness levels would be at zero. However, many organizations have established some type of “presence” in the marketplace and, thus, it is important to obtain benchmark data against which to measure any possible changes in awareness and/or comprehension levels.

Measuring awareness and comprehension levels requires some type of primary research with representatives of key target audience groups.

It is important to keep in mind that **Qualitative Research** (e.g., focus groups, one-on-one depth interviews, convenience polling) is usually open-ended, free response, and unstructured in format; generally relies on nonrandom samples; and is rarely “projectable” to larger audiences.

**Quantitative Research** (e.g., telephone, mail, mall, fax, and e-mail polls), on the other hand, although it may contain some open-ended questions, is far more apt to involve the use of closed-ended, forced choice questions that are highly structured in format, generally relies on random samples, and usually is “projectable” to larger audiences.

To determine whether there have been any changes at all in audience awareness and comprehension levels usually requires some type of comparative studies—that is, either a *before* and *after* survey to measure possible change from one period of time to another, or some type of “test” and “control” group study, in which one segment of a target audience group is deliberately exposed to a given message or concept and a second segment is not, with research conducted with both groups to determine if one segment is now better informed regarding the issues than the other.

## 2. Recall and Retention Measurements

Traditionally, advertising practitioners have paid much more attention to recall and retention measurement than have those in the public relations field.

It is quite common in advertising, after a series of ads have appeared either in the print or the broadcast media, for research to be fielded to determine whether or not those individuals to whom the ad messages have been targeted actually recall those messages on both an unaided and aided basis. Similarly, several weeks after the ads have run, follow-up studies are often fielded to determine if those in the target audience group have retained any of the key themes, concepts, and messages that were contained in the original advertising copy.

Although recall and retention studies have not been done that frequently by public relations practitioners, they clearly are an important form of

*outcome* measurement that ought to be seriously considered by PR professionals. Various data collection techniques can be used when conducting such studies, including telephone, face-to-face, mail, mall, e-mail, and fax polling.

When conducting such studies, it is extremely important that those individuals fielding the project clearly differentiate between messages that are disseminated via PR techniques (e.g., through stories in the media, by word of mouth, at a special event, through a speech, etc.) from those that are disseminated via paid advertising or through marketing promotional efforts. For example, it is never enough to simply report that someone claims they read, heard, or saw a particular item; it is more important to determine whether that individual can determine if the item in question happened to be a news story that appeared in editorial form or was a paid message that someone placed through advertising. Very often, it is difficult for the “average” consumer to differentiate between the two.

### 3. Attitude and Preference Measurements

When it comes to seeking to measure the overall impact or effectiveness of a particular public relations program or activity, assessing individuals’ opinions, attitudes, and preferences become extremely important measures of possible *outcomes*.

It needs to be kept in mind that “opinion research” generally measures what people say about something; that is, their verbal expressions or spoken or written points of view. “Attitude research,” on the other hand, is far deeper and more complex. Usually, attitude research measures not only what people say about something, but also what they know and think (their mental or cognitive predispositions), what they feel (their emotions), and how they are inclined to act (their motivational or drive tendencies).

“Opinion research” is easier to do because one can usually obtain the information desired in a very direct fashion just by asking a few questions. “Attitude research,” however, is far harder and often more expensive to carry out because the information desired often has to be collected in an indirect fashion. For example, one can easily measure people’s *stated* positions on racial and/or ethnic prejudice by simply asking one or several direct questions. However, actually determining whether someone is *in actual fact* racially and/or ethnically prejudiced usually would necessitate asking a series of indirect questions aimed at obtaining a better understanding of people’s cognitions, feelings, and motivational or drive tendencies regarding that topic or issue.

Preference implies that an individual is or will be making a choice, which means that preference measurement, more often than not, ought to include some alternatives, either competitive or perceived competitive products

or organizations. To determine the impact of public relations preference *outcomes* usually necessitates some type of audience exposure to specific public relations *outputs* (e.g., an article, a white paper, a speech, or participation in an activity or event), with research then carried out to determine the overall likelihood of people preferring one product, service, or organization to another.

Usually, opinion, attitude, and preference measurement projects involve interviews not only with those in the public at large, but also with special target audience groups, such as those in the media, business leaders, academicians, security analysts, and portfolio managers, those in the health, medical, and scientific community, government officials, and representatives of civic, cultural, and service organizations. Opinion, attitude, and preference measurement research can be carried out in many different ways, through focus groups, through qualitative and quantitative surveys, and even through panels.

#### 4. Behavior Measurements

The ultimate test of effectiveness—the highest *outcome* measure possible—is whether the behavior of the target audience has changed, at least to some degree, as a result of the public relations program or activity.

For most media relations programs, if you have changed the behavior of the editor and/or reporter so that what he or she writes primarily reflects an organization's key messages, then that organization has achieved a measure of behavior change.

However, measuring behavior is hard because it is often difficult to prove cause-and-effect relationships. The more specific the desired *outcome* and the more focused the PR program or activity that relates to that hoped-for end result, the easier it is to measure PR behavior change. For example, if the intent of a public relations program or activity is to raise more funds for a nonprofit institution and if one can show after the campaign has been concluded that there has, indeed, been increased funding, then one can begin to surmise that the PR activity had a role to play in the behavior change. Or, to give another example: for measuring the effectiveness of a public affairs or government relations program targeted at legislators or regulators, the desired *outcome*—more often than not—would *not only* be to get legislators or regulators to change their views, but *more importantly* to have those legislators and regulators either pass or implement a new set of laws or regulations that reflect the aims of the campaign. Behavior change requires someone to act differently than they have in the past.

More often than not, measuring behavior change requires a broad array of data collection tools and techniques, among them before-and-after surveys, research utilizing ethnographic techniques (e.g., observation, participation, and role playing), the utilization of experimental and



quasi-experimental research designs, and studies that rely on multivariate analyses and sophisticated statistical applications and processes).

What is crucial to bear in mind in connection with PR *outcome* behavior measurement studies is that measuring *correlations*—that is, the associations or relationships that might exist between two variables—is relatively easy. Measuring *causation*—that is, seeking to prove that X was the reason that Y happened—is extremely difficult. Often, there are too many intervening variables that need to be taken into consideration.

Those doing PR *outcome* behavior-measurement studies need to keep in mind these three requirements that need to exist in order to support or document that some activity or event caused something to happen: 1) cause must *always* precede the effect in time; 2) there needs to be a relationship between the two variables under study; and 3) the observed relationship between the two variables cannot be explained away as being due to the influence of some third variable that possibly caused both of them.

The key to effective behavior measurement is a sound, well thought out, reliable, and valid research concept and design. Researchers doing such studies need to make sure that study or test conditions or responses are relevant to the situation to which the findings are supposed to related, and also clearly demonstrate that the analysis and conclusions that are reached are indeed supported and documented by the fieldwork and data collection that was carried out.

### QUESTIONS THAT NEED TO BE PUT TO THOSE ORGANIZATIONS THAT COMMISSION PR EVALUATION STUDIES

Here are some of the key questions that those who commission PR evaluations studies ought to ask themselves before they begin, and also the types of questions that those who actually carry out the assignment ought to ask their clients to answer before the project is launched:

- What are, or were, the specific goals and/or objectives of the public relations, public affairs, and/or marketing communications program, and can these be at all stated in a quantitative or measurable fashion (e.g., To double the number of inquiries received from one year to the next? To increase media coverage by achieving greater “share of voice” in one year than in a previous year? To have certain legislation passed? To enhance or improve brand, product, or corporate image or reputation)?
- Who are, or were, the principal individuals serving as spokespersons for the organization during the communications effort?
- What are, or were, the principal themes, concepts, and messages that the organization was interested in disseminating?

- Who were the principal target audience groups to whom these messages were directed?
- Which channels of communication were used and/or deemed most important to use in disseminating the messages (e.g., the media, word-of-mouth, direct mail, special events)?
- What specific public relations strategies and tactics were used to carry out the program? What were the specific components or elements of the campaign?
- What is, or was, the timeline for the overall public relations program or project?
- What is, or were, the desired or hoped-for outputs and/or out-comes of the public relations effort? If those particular hoped-for outputs and/or outcomes could, for some reason, not be met, what alternative outputs and/or outcomes would the organization be willing to accept?
- How does what is, or has happened, in connection with the organization's public relations effort related to what is, or has happened, in connection with related activities or programs in other areas of the company, such as advertising, marketing, and internal communications?
- Who are the organization's principal competitors? Who are their spokespersons? What are the key themes, concepts, and messages that they are seeking to disseminate? Who are their key target audience groups? What channels of communications are they most frequently utilizing?
- Which media vehicles are, or were, most important to reach for the particular public relations and/or marketing communications activities that were undertaken?
- What were the specific public relations materials and resources utilized as part of the effort? Would it be possible to obtain and review copies of any relevant press releases, brochures, speeches, and promotional materials that were produced and distributed as part of the program?
- What information is already available to the organization that can be utilized by those carrying out the evaluative research assignment to avoid reinventing the wheel and to build on what is already known?
- If part of the project involves an assessment of media coverage, who will be responsible for collecting the clips or copies of broadcast material that will have been generated? What are the ground rules and/or parameters for clip and/or broadcast material assessment?
- What major issues or topics pertaining to the public relations undertaking are, or have been, of greatest importance to the organization commissioning the evaluation research project?
- What is the timeline for the PR evaluation research effort? What are the budgetary parameters and/or limitations for the assignment? Do priorities have to be set?
- Who will be the ultimate recipients of the research findings?

- How will whatever information that is collected be used by the organization that is commissioning the research?

### **QUESTIONS THAT NEED TO BE PUT TO THOSE RESEARCH SUPPLIERS, AGENCIES, AND CONSULTING FIRMS THAT ACTUALLY CONDUCT PR EVALUATION STUDIES**

Here are some of the key questions that ought to be put to those who actually are asked to carry out a PR evaluation research project before the assignment is launched:

- What is, or will be, the actual research design or plan for the PR evaluation project? Is there, or will there be, a full description in non-technical language of what is to be measured, how the data are to be collected, tabulated, analyzed, and reported?
- Will the research design be consistent with the stated purpose of the PR evaluation study that is to be conducted? Is there, or will there be, a precise statement of the universe or population to be studied? Does, or will, the sampling source or frame fairly represent the total universe or population under study?
- Who will actually be supervising and/or carrying out the PR evaluation project? What is, or are, their backgrounds and experience levels? Have they ever done research like this before? Can they give references?
- Who will actually be doing the field work? If the assignment includes media content analysis, who actually will be reading the clips or viewing and/or listening to the broadcast video/audio tapes? If the assignments involve focus groups, who will be moderating the sessions? If the study involves conducting interviews, who will be doing those and how will they be trained, briefed, and monitored?
- What quality control mechanisms have been built into the study to assure that all “readers,” “moderators,” and “interviewers” adhere to the research design and study parameters.
- Who will be preparing any of the data collection instruments, including tally sheets or forms for media content analysis studies, topic guides for focus group projects, and/or questionnaires for telephone, face-to-face, or mail survey research projects? What role will the organization commissioning the PR evaluation assignment be asked, or be permitted, to ply in the final review and approval of these data collection instruments?
- Will there be a written set of instructions and guidelines for the “readers,” the “moderators,” and the “interviewers”?
- Will the coding rules and procedures be available for review?
- If the data are weighted, will the range of the weights be reported? Will the basis for the weights be described and evaluated? Will the effect of the weights on the reliability of the final estimates be reported?

- Will the sample that is eventually drawn be large enough to provide stable findings? Will sampling error limits be shown, if they can be computed? Will the sample's reliability be discussed in language that can clearly be understood without a technical knowledge of statistics?
- How projectable will the research findings be to the total universe or population under study? Will it be clear which respondents or which media vehicles are under-represented, or not represented at all, as part of the research undertaking?
- How will the data processing be handled? Who will be responsible for preparing a tab plan for the project? Which analytical and demographic variables will be included as part of the analysis and interpretation?
- How will the research finding and implications be reported? If there are findings based on the data that were collected, but the implications and/or recommendations stemming from the study go far beyond the actual data that were collected, will there be some effort made to separate the conclusions and observations that are specifically based on the data from those that are not?
- Will there be a statement on the limitations of the research and possible misinterpretations of the findings?
- How will the project be budgeted? Can budget parameters be laid out prior to the actual launch of the assignment? What contingencies can be built into the budget to prevent any unexpected surprises or changes once the project is in the field or is approaching the completion stage?