Guidelines and Standards For Measuring & Evaluating PR Effectiveness

Public Relations Evaluation

PR evaluation is any and all research designed to determine the relative effectiveness of a public relations programme, strategy, or activity, by measuring the outputs and/or outcomes of that PR programme against a predetermined set of objectives.

Interest in public relations evaluation has surged in recent years, as public relations has grown in size and sophistication, and also because those who practice in the field have found increasingly that they are being asked to be accountable for what they do.

Those who supervise or manage an organisation's total communications activities are increasingly asking themselves, their staff members, their agencies and consulting firms, and their research suppliers questions such as these:

- Will those public relations efforts that we initiate actually have an effect -- that is, "move the needle" in the right direction -- and, if so, how can we support and document that from a research perspective?

- Will the communications activities we implement actually change what people know, what they think and feel, and how they actually act?

- What impact -- if any -- will various public relations, marketing communications, and advertising activities have in changing consumer and opinion-leader awareness, understanding, retention, attitude and behaviour levels?

Some Guiding Principles

In focusing on PR measurement and evaluation, there are some guiding principles or key factors to consider.

- Establish clear programme objectives and desired outcomes before you begin, to provide a basis for measurement of results. PR goals should tie directly to the overall goals of the business programme.

- Differentiate between measuring PR outputs, which are usually short-term (e.g. the amount of press coverage received or exposure of a particular message), and measuring PR outcomes, which are usually far-reaching and can have more impact (e.g. determining if the programme changed awareness and attitude levels, and possibly behaviour patterns).

- Measuring media content, while of great value, needs to be viewed as only a first step in the PR evaluation process. It can measure possible exposure to PR messages and actual press coverage; however, it cannot, by itself, measure whether target audiences actually saw the messages and responded to them in any way.

- There is no one, simple, all-encompassing tool or techniques that can be relied on to evaluate PR effectiveness. Usually, a combination of different measurement techniques is needed. Consideration should be given to any one or several of the following: media content analysis, cyberspace analysis, trade show and event measurement, polls and surveys, focus groups, experimental and quasi-experimental designs, and/or ethnographic studies that rely on observation, participation and/or role playing techniques.

- PR effectiveness can best be measured if an organisation's principal messages, key target audience groups, and desired channels of communication are clearly identified and understood in advance.

PR Evaluation Components

For any PR evaluation research to be credible, four major components of the process need to be taken into consideration

1. Setting Specific Measurable PR Goals and Objectives

To begin with, the communications practitioner ought to ask - What are the goals or objectives of the specific programme? What exactly did the programme hope to accomplish? Can these be stated in a quantitative or measurable terms? (example, to double the number of inquiries received from one year to the next, to increase media coverage by achieving greater 'share of voice', etc.)

It must be noted however that is often difficult to separate public relations activities from marketing communications (point-of-purchase promotional activities, coupon redemption programmes, special contests and give-away activities, etc.) and from advertising.

In setting PR goals and objectives, it is important to recognise that measuring PR effectiveness can be quite difficult unless the individual elements or components of the programme are clearly defined. Instead of trying to measure PR as a total entity, steps should be taken to measure the effectiveness of individual PR activities. These could be measuring the effectiveness of specific publicity efforts, a particular community relations programme, a special event or trade show activity, government affairs or lobbying effort, a speaker's programme, or an investor relations activity, and so on.

2. Measuring PR Outputs

Outputs are usually short-term, or immediate, results of a particular PR programme or activity. Outputs measure how well an organisation presents itself to others, the amount of attention or exposure that the organisation receives.

In media relations' effort, outputs can be the total number of stories, articles, or the total number of media impressions. Media Content Analysis is one of the principal methodologies used to measure media outputs.

For other facets of public relations, outputs can be white papers, speaking engagements, the number of times a spokesperson is quoted, specific messages communicated, or specific positioning on an important issue or any number of quantifiable items that are generated as a result of the effort. Outputs also might be assessment of a specific event, a direct mail campaign, the number of people who participated in a given activity, how a CEO handles himself or herself at a press conference, or the appearance and contents of a given brochure or booklet.

In any event, both the quantity and quality of outputs can be measured and evaluated. Media can be evaluated for their content; an event, as to whether the right people were there; a booklet or brochure for its visual appeal and substance; and so on.

3. Measuring PR Outcomes

This measures whether target audience groups actually received the messages, paid attention, understood the messages and retained those messages. Outcomes also measure whether the communications materials and messages that were disseminated have resulted in any opinion, attitude and/or behaviour changes on the part of those audiences to whom the messages were directed.

It is usually more difficult and, generally, more expensive, to measure PR outcomes than it is to measure PR outputs. This is because sophisticated data-gathering research tools and techniques such as quantitative surveys, qualitative depth attitude surveys, ethnographic studies (relying on observation, participation, and/or role-playing techniques), multi-variate studies that rely on advanced statistical applications are required.

4. Measuring Business and/or Organisational Outcomes

It is imperative that the communications practitioner takes steps to link their programme accomplishments to the ultimate goals and objectives of the organisation (such as increasing market penetration, market share, sales, and, ultimately, increasing an organisation's profitability.

For example, the subject of finding a correlation between PR and sales is frequently discussed. Consider response cards after specific articles in trade publications. These could be valuable lead-generation tools. With an effective lead generation system, those leads can frequently be tracked through to sales. However, it must be remembered that while PR may have generated the lead, the closure was influenced by variables such as the individual's need for that product, the quality of the product/service, distribution channel, price, etc. All of these variables need to be taken into consideration when seeking to measure the effectiveness of what occurred.

Standards for measuring PR outputs

These are the four most frequently relied tools and techniques to measure PR impact at the output level:

1. Media Content Analysis
2. Cyberspace Analysis
3. Trade Show and Event Measurement
4. Public Opinion Polls

1. Media Content Analysis

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

The prime function of this technique is to determine whether the key messages, concepts and themes disseminated by the organisation receive any media exposure. The coding, classifying and analysis can be done depending on the needs and interests of the organisation. Usually, media content analysis takes into consideration variables such as these:

Media Vehicle Variables: such as date of publication or broadcast, frequency of publication, media vehicle or type (that is, whether the item appeared in a newspaper, magazine, a newsletter, on radio, or on television) and geographic reach.

Placement or News Item Variables: such as source of the story (whether from a press release, press conference, a special event, or whether the media initiated the item on their own), story type (a news story, feature article, editorial, column, or letter to the editor), degree of exposure (that is, column cms. or air time), and the story's author.

Audience or Reach Variables: The focus is on total number of placements, media impressions and/or circulation – the overall audience reached. More important than impressions is the issue of whether a story reached an organisation's target audience group, by specific demographic segments.

Subject or Topic Variables:

- Who was mentioned and in what context
- How prominently were key organisations and/or their competitors referred (that is, 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 organisation 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 is on the tone of the item. Usually tone implies assessment as to whether the item is positive, negative or neutral; favourable, unfavourable or balanced. It is important to recognise that measuring stance or tone is a subjective measure, open to a possibly different interpretation by others. Clearly defined criteria or ground rules for assessing positives and negatives should be established.

Sometimes, when doing Media Content Analysis, organisations may apply weights to given messages or give greater weight to an article accompanied by a photo or a graphic treatment.

It should be noted that whatever ground rules, criteria and variables are built into a Media Content Analysis or whatever approaches are utilised to turn qualitative information into quantitative form, it is important that all of the elements and components involved be clearly defined and explained upfront.

2. Cyberspace Analysis

Increasingly, a key measure of an organisation's image or reputation is being measured in cyberspace -- chat rooms, forums and news groups on the World Wide Web. The same criteria used in analysing print and broadcast articles can be applied when analysing postings on the Internet.

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

A second output measure of cyberspace might be a review and analysis of Website traffic patterns. For example, some of the variables that can be considered include deconstructing ‘hits’ -- a review of click-throughs and/or flash-click streams, an assessment of home page visits, domain tracking and analysis, assessment of bytes transferred, review of time spent per page, traffic times, browsers used, and the number of people returning feed-back forms.

3. Trade Shows and Event Measurement

For shows and events, one obvious possible output measure is an assessment of total attendance, assessment of the types of individuals present, the number of interviews that were generated and conducted, 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

Public opinion polls are carried out in an effort to determine whether key target audience groups have been exposed to particular messages, or concepts and to assess the overall effectiveness of the 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 practitioners can utilise to measure PR outputs, there also are many that can be used to measure PR outcomes. Some of those most frequently used techniques include all types of surveys -- focus groups, before-and-after polls, ethnographic studies (relying on observation, participation, and/or role playing techniques), and experimental and quasi-experimental research designs. Usually there are four types of outcome measures:

1. Awareness and Comprehension Measurements
2. Recall and Retention Measurements
3. Attitude and Preference Measurements
4. Behaviour Measurements.

1. 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.

Measuring awareness and comprehension levels requires some primary research with representatives of key target audience groups. It is however important to obtain benchmark data against which to measure any possible changes in awareness and/or comprehension levels.

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 non-random samples, and is rarely 'projectable' to larger audiences. Quantitative Research (e.g. telephone, mail, mall, fax, and e-mail polls), on the other hand, may contain some open-ended questions, but relies more on closed-ended questions that are structured in format. This research generally relies on random samples and usually is 'projectable' to larger audiences.

2. Recall and Retention Measurements

Traditionally, advertising practitioners have paid far more attention to recall and retention measurement, than have those in the communications field.

After a series of (print or broadcast) advertisements, it is a common practice in advertising to conduct research to determine whether the target audience actually recalls those messages, unaided or aided. 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.

Recall and retention studies, although not practiced extensively by communications professionals, are an important form of outcome measurement, and should be seriously considered. Various data collection techniques can be used when conducting such studies, including telephone, face-to-face, mail, mall, e-mail, and fax polling.

3. Attitude and Preference Measurements

When it comes to measuring the overall impact or effectiveness of a particular public relations programme, assessing individuals' opinions, attitudes, and preferences becomes an important measure of possible outcomes.

It needs to be kept in mind that opinion research generally measures what people say about something; that is, their verbal, 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 predisposition), what they feel (their emotions), and how they are inclined to act (their motivational or drive tendencies).

Opinion research is easier to conduct as one can obtain information directly by asking few questions. Attitude research is however more expensive to conduct as the information desired has to be collected in an indirect manner. 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 should include some alternatives, either competitive or perceived competitive products or organisations. To determine the impact of a programme, preference outcomes usually necessitates audience exposure to specific outputs (such as an article, a white paper, a speech, etc.), with research then carried out to determine the overall likelihood of people preferring one product, service, or organisation to another.

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

4. Behaviour Measurements

The ultimate test of effectiveness -- the highest outcome measure possible -- is whether the behaviour of the target audience has changed.

However, measuring behaviour is hard because it is often difficult to prove cause-and-effect relationships. The more specific the desired outcome, more focused the PR programme, the easier it is to measure PR behaviour change. For example, if the intent of a programme is to raise more funds for an institution and if there has been increased funding, then one can surmise that the PR activity had a role to play in the behaviour change. Behaviour change requires some one to act differently than they have in the past.

The article has been excerpted from a paper that summarizes the ideas, thoughts and suggestions of The Institute for Public Relations Research & Education special task force seeking to set industry accepted minimum criteria for evaluating PR outputs and outcomes.

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