

Emerging international standards for measurement and evaluation of public relations: A critical analysis

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After 30 years of modest progress in measurement and evaluation of public relations since Jim Grunig uttered his *cri de coeur* about lack of evaluation, a flurry of activity has occurred in the past few years. A new momentum started with the Barcelona Declaration of Measurement Principles in 2010. In 2011, a Coalition for Public Relations Research Standards was formed by three leading international PR and research organizations. In 2012, the group expanded to 11 professional associations which worked in collaboration with advertising and media organizations and companies representing employer perspectives to publish a number of definitions and standards for measurement and evaluation in 2012 and 2013. Concurrently, there have been renewed debates about measurement concepts such as Return on Investment (ROI). As the industry reaches the 20th anniversary of the International Public Relations Association 'Gold Paper on Evaluation' published in 1994, it appears that progress is at last being made. This paper welcomes and commends initiatives taken, but presents a critical analysis that reveals continuing gaps and problematic issues to address in the latest efforts to measure the value of PR and a substantial gap between theory and practice.

Keywords: Public relations, measurement, evaluation, measurement standards, ROI

The long and winding road to PR evaluation

2013 marked the 30th anniversary of what Watson and Noble (2007) described as Jim Grunig's *cri de coeur* (cry from the heart) about the lack of evaluation of PR, when Grunig famously lamented:

Lately, I have begun to feel more and more like the 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, however, and PR people continue not to do evaluation research (Grunig, 1983: 28).

2014 is the 20th anniversary of publication of the International Public Relations Association (IPRA) Gold Paper on Evaluation that was the first global rallying call by industry leaders for practitioners to conduct valid and rigorous measurement and evaluation of their activities. These were far from the first initiatives in PR measurement and evaluation, as Likely and Watson note in introducing their recent review of practice over the past 40 years. They point out that practices of PR measurement date back to the late 18th century and note the use of public opinion surveys and monitoring by Edward Bernays and Arthur Page in the early 20th century (2013: 144). Most importantly, as Watson (2012) reported, scholarly research and theorisation of PR measurement and evaluation began in the late 1960s and made substantial progress through the 1970s.

The long and chequered history of PR measurement and evaluation has been thoroughly summarised by Watson (2012) and Likely and Watson (2013), and discussed by many others, including Broom and Dozier (1990), Lindenmann (2003), Macnamara (2002, 2005),

Michaelson and Stacks (2011), Stacks and Michaelson (2010) and Watson and Noble (2007). So, the literature will not be reviewed here, except for noting the major theories of measurement and evaluation that were developed during this “flowering of research” (Likely and Watson 2013: 144) and in more recent scholarly research such as the Excellence study (L Grunig, J Grunig and Dozier, 2002) and models for measurement and evaluation developed by Cutlip, Center and Broom (1985), Macnamara (2005, 2012), Watson and Noble (2007), and others. As the focus of this article is recent developments in standards, these will be discussed first and then major theories and models of PR measurement and evaluation will be convoked as a framework for reviewing progress and drawing conclusions.

In the past few years since the Barcelona Declaration of Measurement Principles in 2010 (Institute for Public Relations, 2010), there has been a flurry of industry activity with 16 professional PR and communication organizations worldwide working together and with employers as well as academics to some extent to develop standards for measurement and evaluation. Several draft standards were published in 2012 and 2013. These developments and milestones indicate that it is a good time to review progress made and analyse the latest principles and proposals put forward for measuring and evaluating PR.

The Barcelona Declaration of Measurement Principles adopted at the second European Summit on Measurement by more than 200 delegates from 33 countries provides a useful and concise summary of what the industry has learned and agreed to as normative theory, principles and guidelines for measurement and evaluation. They also provide the framework and a roadmap for the “march to standards” (Marklein and Paine, 2012) that has occurred over the past few years. The seven principles adopted in Barcelona state:

- Goal setting and measurement are fundamental aspects of any public relations program;
- Measuring the effects on outcomes is preferred to measuring outputs;
- The effect on business results should be measured where possible;
- Media measurement requires quantity and quality;
- Advertising value equivalents (AVEs) are not the value of public relations;
- Social media can and should be measured;
- Transparency and replicability are paramount to sound measurement (Institute for Public Relations, 2010).

Why standards?

A number of factors have contributed to the growing momentum to establish international standards for measurement and evaluation of PR. Despite 40 years of research and widespread industry discussion (e.g., see Watson, 2008), practitioners remain concerned that they cannot convincingly demonstrate the value of PR for businesses and organizations. For instance, a 2012 study found that 75 per cent of European practitioners identified inability “to prove the impact of communication activities on organizational goals” as a “major barrier to further professionalization” (Zerfass et al., 2012: 36). Michaelson and Stacks (2011) found that more than two-thirds of practitioners believe that standards for measurement and evaluation are necessary.

Notwithstanding a rhetoric of research commitment – e.g., a Delphi study by Watson (2008) of practitioners, industry association leaders and academics found the top three topics of concern all connected with measurement and evaluation – research studies show a continuing use of rudimentary measures such as counting press clippings and even spurious metrics such as Advertising Value Equivalents (AVEs). As recently as 2009, AVEs were the third most used PR metric employed by 35 per cent of practitioners (Wright et al., 2009).

The industry’s struggle with measurement and evaluation continues with social media. A longitudinal study of social media use by PR and corporate communication practitioners from 2006 to 2012 by Wright and Hinson (2012) found that 54 per cent measured what external publics said about them in blogs or other social media (i.e. monitoring and content analysis), but only 26 per cent reported that they measure the impact of social media communication on the formation, change and reinforcement of attitudes, opinions and behaviour.

There is also a plethora of terms and metrics used, often in inconsistent and confusing ways in PR measurement literature and discourse, as will be shown in this analysis. Today, with social as well as traditional media, the range of metrics advanced as the solution to PR measurement and evaluation is ever growing, as shown in Table 1.

Basic output metrics	Outputs → Outtakes	Outtakes → Outcomes
Counts of press clippings	Unique visitors	Engagement
Audience	Views	Influence
Reach	Likes	Impact
Target audience reach	Followers	Awareness
Impressions	Fans	Attitudes
Opportunities to see (OTS)	Clickthroughs	Trust
Share of voice	Downloads	Loyalty
Cost per thousand (CPM)	Comments	Reputation
Hits	Tone	Relationships
Visits	Sentiment	Return on investment (ROI)

Table 1. Terms used in measurement and evaluation literature in relation to PR and social media communication.

The situation faced by practitioners is made more complex by the array of service providers offering measurement and evaluation solutions using widely varying methodology and sometimes employing ‘black box’ approaches based on proprietary algorithms hidden in computer code. In arguing “why we need social media standards”, Katie Paine estimated that there are more than 150 companies claiming to measure social media with most using different methods and often different terms for key metrics. She said the resulting “train wreck” is “confusing customers”, “wastes money”, “wastes time” and is “holding the industry back” (Paine, 2011: paras 4–11).

There is also some evidence that practitioners want standards and see them as a way to resolve the apparent impasse in implementing rigorous measurement and evaluation of public relations. For instance, in a 2013 Ragan/NASDAQ OMX Corporate Solutions survey, 66 per cent of PR professionals cited “lack of standards as the biggest problem with PR measurement” (Ragan/NASDAQ OMX, 2013).

Recent milestones in PR measurement

Continuing requests from clients and employers for more accountability and measurability in PR, demands from practitioners such as those expressed in the 2013 Ragan/NASDAQ OMX survey and advice from academics and research institutes urging a research-based approach

have coalesced in the past few years in a series of initiatives. Key recent milestones include the following.

- The Coalition for Public Relations Research Standards was established in 2011 by the Institute for Public Relations (IPR), the Council of PR Firms (CPRF) and the International Association for Measurement and Evaluation of Communication (AMEC) to collaboratively develop standards for measurement and evaluation of PR within the framework of the Barcelona Declaration of Measurement Principles. The Coalition identified six stages or areas for development of standards as follows:
 - Content sourcing and methods;
 - Reach and impressions (also called ‘opportunities to see’);
 - Engagement;
 - Influence and relevance;
 - Opinion and advocacy; and
 - Impact and value (Marklein and Paine, 2012; Paine, 2012).
- In 2012, the Coalition released ‘Proposed Interim Standards for Metrics in Traditional Media Analysis’ (Eisenmann et al., 2012) which included definitions of key media content analysis terms such as *items*, *impressions*, *mentions*, *tone* and *sentiment*.
- Also in 2012, the Social Media Measurement Standards Conclave was established, known as the #SMMStandards Conclave for short. The Conclave involved collaboration by 11 professional PR and communication organizations worldwide, as well as consultation with five media and advertising industry bodies and eight companies representing employer perspectives to extend the standards initiative to include social media and global cooperation. Membership of the Conclave comprised the three founding Coalition members (AMEC, CPRF and IPR) as well as the Global Alliance for Public Relations and Communications Management; the International Association of Business Communicators (IABC); the Public Relations Society of America (PRSA); the UK Chartered Institute of Public Relations (CIPR); the Society for New Communications Research (SNCR); the Federation Internationale des Bureaux d’Extraits de Presse (FIBEP); the Word of Mouth Marketing Association (WOMMA) and the Digital Analytics Association (DAA). In addition, the Coalition and the Conclave have worked in consultation with the Media Ratings Council (MRC); the Interactive Advertising Bureau (IAB); the American Association of Advertising Agencies (AAAA); the Association of National Advertisers (ANA) and the Web Analytics Association. This has been an important step in trying to achieve consistent terminology and compatibility of metrics across the corporate and marketing communications field which will reduce client and employer confusion. Corporations involved in the development of standards to have included Dell, Ford Motor Company, General Motors, McDonalds, Procter & Gamble, SAS, Southwest Airlines and Thomson Reuters.
- At the fourth European Summit on Measurement in Dublin in 2012, the Coalition for Public Relations Research Standards on behalf of its Conclave members released three documents as the first stage of social media measurement standards: ‘Valid Metrics for Social Media’ (Daniels, 2012a), the ‘Sources and Methods Transparency Table’ (SMMStandards, 2012a) and ‘Social Media Standard Definitions for Reach and Impressions’ (Digital Analytics Association, 2013; SMMStandards, 2012b).

- During 2013 the Coalition and Conclave continued to collaboratively produce standards for defining and measuring outtakes including opinion and advocacy (measured as *tone* or *sentiment*) and *engagement* and in 2014 they plan to develop standards for *influence*, *impact* and *value*.

Concurrently, debate about Return on Investment (ROI) as a metric for expressing PR outcomes has continued to rage in conferences, forums and in professional and academic papers (e.g., Daniels, 2012b; Lee and Yoon, 2010).

This analysis focuses on critically examining three of the six stages identified in the “march to standards” (Marklein and Paine, 2012) that have advanced to published papers: (1) definitions of *reach* and *impressions* or opportunities to see (OTS); (2) *tone* and *sentiment* in relation to opinion and advocacy expressed in media content or online; and (3) the conceptualization of *engagement*, as well as ROI because of the extent and currency of debate about this metric.

Reach and impressions

The first stage of developing standards for PR measurement and evaluation focussed on definitions of key terms, recognizing that standardization in the use of metrics such as reach and impressions (or OTS) is essential for transparency and replicability (one of the Barcelona Principles) and also because consistency with usage of the same metrics in advertising and other areas of marketing communication is desirable. Varying calculations of reach and impressions or OTS cause confusion and undermine confidence in PR measurement and evaluation.

The ‘Social Media Standard Definitions for Reach and Impressions’ prepared by the Digital Analytics Association (DAA), which collaborated in the #SMMStandards initiative to help define foundational measures, says that “*reach* represents the total number of unique people who had an opportunity to see an item” (Digital Analytics Association, 2013: 2; SMMStandards, 2012b: para. 15) [emphasis added]. However, the ‘Proposed Interim Standards for Metrics in Traditional Media Analysis’, drawing on Lindenmann’s ‘Guidelines and Standards for Measuring PR Effectiveness’ (1997/2003: 9–10), the *Dictionary of Public Relations Measurement and Research* (Stacks, 2006: 9) and *The Primer of Public Relations Research* (Stacks, 2011: 335), gives a similar definition for *impressions*, saying:

Impressions – the number of people having the opportunity for exposure to a media story; also known as ‘opportunity to see’ (OTS); usually refers to the total audited circulation of a publication or the verified audience-reach of a broadcast vehicle or viewers of an online news story (Eisenmann et al., 2012: 3).

Thus, these documents are suggesting that reach and impressions are the same thing – a claim that is contested by others. For instance, the Interactive Advertising Bureau (IAB) has published separate guidelines for calculating reach (IAB, 2009) and impressions (IAB, 2004a), with quite different criteria. In addition to providing a very strict definition of reach which it recommends is based on independent audited audience data, the IAB’s ‘Ad Impression Measurement Guidelines’ say “a valid ad impression” is “counted when an ad counter receives and responds to an HTTP request for a tracking asset from a client” (IAB, 2004b, p. 5). Despite the use of IT and marketing terms, it is clear in this definition that an impression is counted each time “a client” (a Web user) requests a “tracking asset” (content being tracked). Users can view content multiple times in a measurement period and each view is counted.

Facebook, one of the largest advertising sites in the world, has similarly published significantly differentiated definitions of reach and impressions, saying:

Impressions measure the number of times a post from your page is displayed, whether the post is clicked on or not. People may see multiple impressions of the same post. For example, a fan might see a page update in News Feed once, and then a second time if their friend shares it.

Reach measures the number of people who received impressions of a page post. The reach number might be less than the impressions number since one person can see multiple impressions (Facebook, 2013).

These widely used advertising definitions indicate that reach and impressions are not the same thing. In simple terms, reach is a measure of *people* in an audience; impressions is a measure of *exposures* that content might gain, including multiple exposures that one person might experience. The number of impressions is usually higher than reach, although this must be established statistically with reliable data, not calculated using arbitrary multipliers.

After describing reach as “the total number of unique people who had an opportunity to see an item”, the Digital Analytics Association says “impressions represent the number of times an item was displayed”, adding “impressions represent the gross number of items that could have been seen by all people, including repeats” (Digital Analytics Association, 2013: 2). Repeat exposures are referred to as *frequency* in the advertising industry, but this metric seems to be missing from many discussions of media measurement in PR – for example, the term does not appear in the ‘Proposed Interim Standards for Metrics in Traditional Media Analysis’ (Eisenmann et al., 2012), which is perhaps the reason for confusion.

These definitions drawn from industry literature show that, despite a move towards standards, there is lack of consistency and agreement within industry even on basic metrics. A review of the draft standards proposed for PR measurement and evaluation in relation to reach and impressions compared with literature in the advertising and digital marketing fields shows that there are two differing definitions of impressions being advanced, as follows:

1. The number of *people* who have the opportunity to be exposed to a media item based on audited circulation, broadcast ratings data or unique visitors to an internet page – what the Digital Analytics Association and most advertising agencies call ‘reach’ and others call ‘audience’ or ‘audience reach’. This view is cited in the ‘Proposed Interim Standards for Metrics in Traditional Media Analysis’ (Eisenmann et al., 2012), the *Dictionary of Public Relations Measurement and Research* (Stacks, 2006), as well as Stacks and Michaelson (2010) and Stacks (2011);
2. The number of possible *exposures* of a media item to a defined audience, as proposed by the Digital Analytics Association, the Interactive Advertising Bureau, Facebook and other advertising sites. By this definition, impressions, or ‘opportunities to see’ (OTS), is the total number of people potentially reached through a medium (reach) multiplied by the number of times that items were exposed to that audience (frequency). In formula terms $impressions = reach \times frequency$.

Based on analysis of advertising, online marketing and PR literature, it is argued here that the first definition above describes ‘reach’ and the second definition is the most common understanding of ‘impressions’. Opportunities to see (OTS), which is widely cited as synonymous with impressions (e.g., Paine, 2007: 52; Stacks and Bowen, 2013: 14), is therefore also most accurately described in the second definition. It is further argued that

understanding a difference between reach and impressions (or OTS) is important because, in the age of the internet and social media, users often view online pages more than once, unlike traditional media items that are usually read, viewed or heard one time. Also, PR and corporate communication practitioners often want to go beyond measuring likely exposure to media items (i.e. articles) to measure potential exposure to specific messages that may appear multiple times in an item – a legitimate practice because repetition of key messages is an important factor in likely audience awareness, retention and impact.

However, in this instance, turning to scholarly literature will not resolve the inconsistency and lack of clarity. The recently released third edition of the *Dictionary of Public Relations Measurement and Research* defines impressions as both “the number of possible *exposures* of a media item to a defined set of stakeholders” and “the number of *people* who might have had the opportunity to be exposed to a story that has appeared in the media” and then adds that the term “usually refers to the total audited circulation of a publication or the *audience reach* of a broadcast vehicle” (Stacks and Bowen, 2013: 14) [italics added]. The second and third descriptions provided in this definition contradict the first in the case of an audience being exposed to a brand or message multiple times over a period and render the terms impressions and exposures redundant, as it treats exposures, people and audience reach as determined by audited circulation as the same thing. Elsewhere, the dictionary defines ‘reach’ as “the size of an audience exposed to a communication based on some audited system” in the case of traditional media (i.e., the same as the second and third descriptions of impressions). The dictionary’s further definition of the reach of social media as “the number of unique social media mentions divided by the total mentions” seems to confuse ‘unique visitors’ with ‘mentions’ and is erroneous as a measure of audience size (Stacks and Bowen, 2013: 26). These examples indicate that both academics and industry have a way to go in establishing clear, unambiguous guidelines for measurement and evaluation, even for basic metrics such as reach, audience, impressions.

Opinion and advocacy

Opinion and advocacy can be expressed and measured in public comments such as in speeches, in traditional media (newspapers, magazines, radio and television) and in online comments, such as in blogs, microblog posts on Twitter and Tumblr, Facebook Wall posts, videos on sites such as YouTube and Vimeo and in online forums and discussion groups.

The two most common metrics used to denote the degree to which media coverage and online comment expresses opinion or advocacy are *tone* and *sentiment*. These terms are used interchangeably in most standards literature (e.g., Eisenmann, 2012: 8), although there are important differences which appear to be ignored in current discussion of standards. Tone is related to voice and speaking – and media content is a form of speaking and voice. Sentiment is a human emotion, felt inside a person. Therefore, tone is the most appropriate term to apply to evaluation of content such as media articles and online comment. Sentiment is more appropriately a measure of audience or public feelings towards a brand, product or organization. The difference is more than semantics. It can be concluded that tone is a measure of output, while sentiment can be an outcome. The development of standards for measurement and evaluation of PR needs to better recognise such key differences.

Tone can be measured in a number of ways using various descriptive ratings or scales. The most common is a simple three-point rating of *positive*, *negative* or *neutral*. This form of rating suffers from subjectivity, as it is usually applied by practitioners themselves and there are rarely specific criteria developed and published for each of the categories. Also, as in most media content analysis, it is applied from the perspective of the client organisation and

is not a generalizable rating of media content tone. However, it is relatively quick and easy to apply and gives a broad qualitative assessment of media content.

Some members of the Coalition for Public Relations Research Standards argue for *balanced* as a fourth category, noting that neutral content may have neither positive nor negative elements (e.g., it may be a ‘passing mention’), while balanced can denote content that has an equal mix of positive and negative comments. As descriptions, positive, negative, neutral and balanced can work in a rating scheme, but if used as a scale they are problematic, as scales should be comprised of an uneven number of intervals – such as three, five, seven or nine point Likert scales or 0–100 scales – which provide a mid-point (median) and an even number of intervals above and below the median. Industry measurement systems frequently ignore such basic research procedures.

Tone is also measured in other ways, such as *favourability*. In some uses, favourability is simply a synonym for positivity, but in some media content analysis systems it is a multivariate score which takes into account a number of variables such as size/length of the item, placement (e.g., page number, section or order in contents), positioning on a page (lead item, small filler, etcetera) and audience reach, as well as messages contained in the item. Such sophisticated coding usually requires professional research skills and specialist software.

The ‘Proposed Interim Standards for Metrics in Traditional Media Analysis’ discusses three approaches to analysing content (Eisenmann et al., 2012: 8). The document identifies and defines *manifest* analysis which it says “looks at an item as a series of sentences or paragraphs” and assesses each in terms of its tone and then “adds up the total number of positive and negative mentions to obtain an overall score”. A second approach is *latent* analysis which the Coalition’s draft of standards for media analysis describes as “to look at the entire article or mention and judge the item as a whole analysis”. Furthermore, the proposed standards suggest a third approach which is “to avoid assessing tone based on the whole story and make the evaluation on the basis of pre-determined positive and negative messages present in the article”.

This section of the ‘Proposed Interim Standards for Metrics in Traditional Media Analysis’ is problematic and needs revision, as it is not in accordance with social science research literature. It oversimplifies latent content analysis and confusingly posits a third approach which is really the basis of manifest analysis. One of the most widely-used and authoritative texts on the subject, *The Content Analysis Guidebook* (Neuendorf, 2002) says manifest content analysis examines “elements that are physically present and countable”, identifying these as the presence or absence of key words and phrases which, in media content analysis, are often associated with ‘messages’, ‘topics’ (e.g., company, brand or product names) and ‘issues’. Thus, the “third approach” to content analysis described in the proposed standards is actually manifest content analysis more specifically explained.

Neuendorf describes the latent meanings of content as “consisting of unobserved concepts that cannot be measured directly” (2002: 23). In an ‘Introduction to Content Analysis’ in his book *Qualitative Research Methods for the Social Sciences*, Berg says latent analysis involves “an interpretive reading of the symbolism underlying the physical data” (2007: 242). While the description in the proposed standards for traditional media analysis which refers to “looking at the entire article or mention” and making “a whole analysis” is partly correct, it suggests that latent content analysis is a short-cut to calculate a score for an item when, in reality, latent content analysis requires careful and time-consuming analysis based on a knowledge of semiotics, narrative analysis and discourse analysis. Latent content analysis is

not simply assessing the tone or sentiment of an article as a whole and it rarely if ever produces a score or rating. Rather, latent analysis reveals conceptual frameworks and ideologies, such as sexism, racism, neoliberal capitalist values and so on that may be unsaid but underpinning and implied in what is said.

As well as illustrating the industry's focus on media measurement, discussion of tone and sentiment and forms of content analysis in the standards debate reveals a lack of social science and interpretive research rigor that characterises much discussion of measurement and evaluation in the PR industry.

Engagement

Engagement has become a widely used buzzword in marketing, advertising, political communication, public consultation and PR and is another important concept for which an agreed definition and standards for measurement are required in order to achieve consistency and methodological reliability. Interestingly, even though engagement ideally occurs offline as well as online, the movement to establish standards for PR measurement and evaluation has focussed predominantly on engagement through social media. This further illustrates a focus on media coverage that continues to dominate discussion of PR measurement and evaluation.

In a summary of proposed social media standards in relation to engagement and conversation, editor of *The Measurement Standard* Bill Paarlberg (2013) stated that “engagement is defined as some action beyond exposure and implies an interaction between two or more parties” (para. 3). While usefully emphasizing interaction, this definition is very broad and requires further clarification in order to inform practice. The International Association for Measurement and Evaluation of Communication (AMEC) in its online glossary of measurement terms is more specific, saying engage means to “occupy or attract someone’s interest or attention; involve someone in a conversation or discussion” (AMEC, 2012: para. 21).

This contrasts and conflicts to some extent with Paarlberg’s report on standards for measuring engagement that says “engagement counts such actions as likes, comments, shares, votes, +1s, links, retweets, video views, content embeds, etc” (2013: para. 7). Simply ‘liking’ something on Facebook, posting links to a site and viewing videos hardly comprise conversation or discussion and do not meet the definitions of engagement in psychology, education or political science literature in which engagement is extensively discussed. While it is becoming common practice in advertising, marketing and increasingly in PR is to conceptualise engagement in terms of low-level interactivity such as clickthroughs, Web page visits, views, ‘likes’ on Facebook, ‘follows’ on Twitter, retweets, ‘shares’ and downloads (e.g., Marklein and Paine, 2012), these are what some psychologists refer to as ‘fragments of behaviour’. They are somewhat useful indicators of small steps towards engagement, but they are quantitatively minor in terms of impact and qualitatively ambiguous. For instance, visits, views, ‘follows’ and even downloads, ‘shares’ and ‘retweets’ can result in audiences disliking what they find. Equally, ‘follows’ and ‘downloads’ are single actions that can quickly dissolve into disinterest and disengagement.

Engagement is a deep psychological concept, involving commitment and some level of passion and investment of discretionary effort (Erickson, 2008). More specifically, organizational psychologists identify three key components of engagement, saying it involves:

1. A psychological bond based on *affective commitment* (i.e., emotional attachment such as a sense of belonging, feeling valued, etc.), as well as cognitive processing of information received and experiences;
2. *Positive affectivity*, a deeper level of positive emotional engagement which involves pride, passion and ‘absorption’, enthusiasm, energy and even excitement; and
3. Empowerment of those we are trying to engage, which psychologists and political scientists say is most effectively achieved through *participation* (Macey and Schneider, 2008; Meyer and Smith, 2000: 320; Rhoades, Eisenberger and Armeli, 2001).

PR practitioners need to resist the superficial hype and ‘buzz’ that are prevalent in the advertising and online marketing fields and develop and measure meaningful forms of engagement with publics and stakeholders that involve cognition, emotional connection and participation in conversations as well as even deeper levels of interactivity such as collaboration. This is an area in which a body of research literature and theory are available in PR scholarship as well as in neighbouring disciplines such as psychology and democratic political theory, but this is little applied.

Return on Investment (ROI)

An approach to evaluation that is used in various ways in PR practice and which has been extensively discussed as an ultimate metric to identify and express the value of PR to an organization is the concept of Return on Investment (ROI). As a number of authors have noted, ROI was developed in financial accounting. The appeals of ROI are that it is an outcome measure that allegedly indicates a financial ‘bottom line’ result and it is a popular term in the language of senior management.

But those characteristics are also reasons why ROI is problematic as a measure of public relations. An international analysis by Watson and Zerfass (2011, 2012) identified several problems and limitations in trying to calculate the ROI of PR. First, ROI is quite specifically defined and understood in business and finance. Watson (2013) describes ROI as “a ratio of monetary value created, divided by the costs incurred and multiplied by 100” (para. 5) – although, strictly speaking, this formula yields a percentage return rate, not a ratio (e.g., \$100,000 profit ÷ \$50,000 costs x 100 = 200%). Also, it is not clear in this definition whether “monetary value created” is gross or net financial return. Drawing on Flamholtz (1985), Meng and Berger give a more specific ratio formula for calculating ROI as “ROI = net profits (or savings) ÷ by investment” (2012: 333). In the latest edition of *Dictionary of Public Relations Measurement and Research*, Stacks and Bowen define ROI as “net financial return (gross financial return minus the financial investment) divided by the financial investment x 100” (2013: 27) and support Watson’s view that ROI is usually expressed as a percentage. However, each of these definitions produces different formulae and can produce different ROI results, as shown in Table 2.

Typical of business and finance industry views, *Investopedia* (2013) notes that ROI is calculated in different ways in different sectors of business such as marketing and finance, but says that a financial analyst is most likely to evaluate a product “by dividing the net income of an investment by the total value of all resources that have been employed to make and sell the product” (para. 5). This indicates non-financial versions of ROI and short-cut derivatives are unlikely to have credibility with financially-orientated C-suite executives.

Source	Description	Formula	ROI
Watson (2013: para. 5)	“A ratio of monetary value created, divided by the costs incurred and multiplied by 100”	<i>If monetary value is gross:</i> $\$150,000 \div \$50,000 \times 100 = 300$	Percentage ROI = 300%
		<i>If monetary value is net:</i> $\$100,000 \div \$50,000 \times 100 = 200$	ROI = 200%
Meng & Berger (2012: 333)	“ROI = net profits (or savings) ÷ by investment”	$\$100,000 \div \$50,000 = 2$	Ratio ROI = 2:1
Stacks & Bowen (2013: 27)	“Net financial return (gross financial return minus the financial investment) divided by the financial investment x 100”	$\$150,000 - \$50,000 \div \$50,000 \times 100 = 200$	Percentage ROI: 200%

Table 2. Proposed ROI formulae and calculations based on an example in which costs incurred / financial investment = \$50,000; gross financial return = \$150,000; and therefore net financial return / net profits = \$100,000.

This concern prompted Watson and Zerfass to recommend that practitioners “refrain from using the term in order to keep their vocabulary compatible with the ... management world”. Author of *The Business of Influence*, Philip Sheldrake, has gone further stating:

I dislike any attempt to hijack the term ROI. Accountants know what ROI means and they can only view any softening or redirection or substitution of its meaning by marketers trying to validate their investment plans as smoke and mirrors (2011: 117).

Beyond the risk of presenting “smoke and mirrors” in calculations of alleged PR ROI (Watson and Zerfass, 2012), a second problem with ROI is that many PR activities do not seek or have a financial return (e.g., government and non-profit PR). Also, there is a valid argument that some of the outcomes of PR are long-term, such as building relationships, and do not have a short-term effect on the financial ‘bottom line’. As Watson and Zerfass concluded, in many cases “the complexity of communication processes and their role in business interactions means it is not possible to calculate Return on Investment in financial terms” (2011: 11).

To try to accommodate the varying outcomes of PR and recognise results other than financial returns, a range of what Watson and Zerfass (2012) call “quasi-ROI” measures have been put forward. For instance, four variations have been proposed for evaluating media publicity by Likely, Rockland and Weiner (2006), as follows:

- *Return on impressions* (ROI), which assumes that a certain number of media impressions will lead to awareness and then a proportion will change their attitudes and behaviour as a result – a ‘domino’ effect argument that Likely, Rockland and Weiner themselves admit is problematic;
- *Return on media impact* (ROMI), which compares media coverage and sales data over a period to try to determine cause and effect;
- *Return on target influence* (ROTI), which uses surveys before and after exposure to media coverage to evaluate changes in awareness or intention to buy; and
- *Return on earned media* (ROEM), which is essentially AVEs by another name.

In their recent book on PR measurement, Stacks and Michaelson (2010) propose Return on Expectations (ROE) as a more broad-based derivative of ROI for PR to cover non-financial as well as financial returns and differentiate PR measurement from the accounting formula of ROI. However, despite some merit in various arguments, these proposals further ‘muddy the waters’ with a proliferation of terms, rather than provide clear methods for identifying and describing the value of PR. ROE also raises the question of whose expectations are to be met (senior management, the PR practitioner or stakeholders) and continues to leave unanswered the question of how are these quantified?

Yet more derivatives of ROI for PR measurement have been proposed by Meng and Berger (2012), drawing on the marketing communication concepts of Return on Brand Investment (ROBI), also referred to as “return on brand communication” (Schultz, 2002), and Return on Customer Investment (ROCI) discussed by Schultz and Schultz (2004). Meng and Berger acknowledge that practitioners and scholars in the marketing communication and integrated marketing fields “believe that using a single metric to assess marketing communication performance is problematic” and, instead, they call for “the development of appropriate techniques for not only measuring short-term return on customer investment (ROCI) but also long-term value of customer relationships” (2012: 334). Nevertheless, they go on to discuss *Return on Communication Investment*, another form of ROCI, as a metric for financial and non-financial returns from investment in PR (Meng and Berger, 2012: 334).

In a recent book, *Social Media ROI: Managing and Measuring Social Media Efforts in Your Organization*, Olivier Blanchard (2011) has added yet another variation to the rubric of ROI. However, Blanchard simply applies traditional “loose” PR interpretations of ROI to social media and relies on basic metrics, as discussed in relation to engagement.

A related ROI concept, *Social Return on Investment* (SROI), or *Social ROI*, has been surprisingly little mentioned in PR literature and the measurement and evaluation standards debate, even though it has been widely discussed in government and the non-profit sector. Social ROI is not the same thing as social media ROI, as discussed by Blanchard (2011), Powell, Groves and Dimos (2011) and practitioners such as Brian Solis (2010). Social ROI uses cost-benefit analysis and social accounting to calculate the value of a range of activities conducted by organizations that do not have direct financial returns. The creator of one of the leading tools used for calculating SROI provides this definition:

Social Return on Investment (SROI) is an approach to understanding and managing the value of the social, economic and environmental outcomes created by an activity or an organization ... based on a set of principles (Social E-valuator, 2013).

This broader concept of measuring and evaluating PR (i.e., beyond the organisation’s objectives) offers an innovative sociocultural approach. However, the ‘proxy’ financial values applied to impacts which do not typically have market values and the use of various formulae and ‘black box’ algorithms provided in software programs and calculation guides have drawn criticism for being arbitrary and subjective (SROI Network, 2012; Nicholls, Mackenzie and Somers, 2007; Scholten et al., 2006). Also, it needs to be recognised that SROI is mainly used by social enterprises – that is, organizations that operate primarily to “serve the community’s interest (social, societal, environmental objectives) rather than profit maximization” (European Commission, 2013).

The proliferation and use of “quasi-ROI” terms, such as PR ROI, ROI (as in Return on Impressions), ROMI, ROTI, ROEM, ROE, social media ROI, use of marketing communication derivatives such as ROBI and ROCI, or appropriation of the concept of

SROI, are unlikely to facilitate either understanding or standards, given the variations in methods used and unanswered questions about their validity. A progress report on standards for measurement and evaluation presented at the fourth European Summit on Measurement in Dublin in 2012 recommended that “ROI should be strictly limited to measurable financial impact” when this occurs (Marklein and Paine, 2012), a recommendation supported by Watson and Zerfass (2012) and Likely and Watson, 2013).

Cracks and gaps in standards and how to mend them

This analysis shows that Michaelson and Stacks’ finding that “public relations practitioners have consistently failed to achieve consensus on what the basic evaluative measures are or how to conduct the underlying research for evaluating and measuring public relations performance” (2011: 1) remains true 20 years after the IPRA Gold Paper called for international standards and despite more than three years of intensive discussions since the Barcelona Principles were adopted. As Michaelson and Stacks note, standards are essential as they allow “comparative evaluations” (2011: 4). That is to say, single measures and evaluations and multiple evaluations using different measures and methods are of little utility, as they cannot demonstrate change or value. But standard procedures allow before and after comparisons, comparison of returns against costs, and comparisons with other approaches, competitors or campaigns. Thus, they allow practitioners to identify progress, cost effectiveness and achievement of objectives.

Two key questions arise from this analysis: (1) why, after so much research and debate, are PR practitioners still not measuring and evaluating the outcomes of their activities in valid reliable ways and (2) what can be done to address cracks and gaps in standards that are starkly evident?

While this one article cannot provide a comprehensive response to such important questions, some findings do emerge from this critical analysis. In relation to the first question, it can be seen that the alleged international “march to standards” has been dominated by industry organisations and practitioners, with only occasional inputs from academics with specialist expertise in quantitative and qualitative research methodology as well as specific PR measurement and evaluation methods. This reflects a generalised gap between theory and practice in PR, which has been discussed by a number of authors (e.g., Cheng and de Gregario, 2008; Okay and Okay, 2008). This disconnect has resulted in practitioners continuing to flounder in demonstrating the value of public relations to their employers and clients, when some solutions have been available since the late 1970s and academic PR research on evaluation proliferated during the 1980s and 1990s, as noted by Likely and Watson (2013).

For example, a number of models of PR research and evaluation have been developed, starting with Cutlip, Center and Broom’s (1985) Preparation, Implement, Impact (PII) model, followed by the PR Effectiveness Yardstick (Lindenmann, 1993), the Continuing Model of Evaluation (Watson, 1997), the Unified Evaluation Model (Noble and Watson, 1999; Watson and Noble, 2007) and the Pyramid Model of PR Research (Macnamara, 2002, 2005, 2012), which was based on the earlier Macro Model of Evaluation (Macnamara, 1992, 1999), as well as others. All of these models identify key stages of measurement and evaluation, such as inputs, outputs, outtakes and outcomes, and some identify specific research methods, tools and techniques for calculating and demonstrating returns and value (e.g., the Pyramid Model of PR Research). However, these are little discussed beyond scholarly literature.

Even more specifically in terms of theoretical contributions, in interviews with CEOs conducted as part of the Excellence study, Grunig et al. (2002) used a *compensating variation* approach to find that most CEOs readily agreed that PR contributed value to their organisation and most could estimate that value in numerical terms – albeit not in financial terms typical of ROI. CEOs interviewed estimated the average return on investment in PR at 186% and up to 225% under conditions of PR excellence as identified in the Excellence study. Even the least excellent PR departments were estimated to produce 140% return on investment by their CEOs. Compared with other organisation departments, CEOs rated PR at 160 where 100 was the average for all departments (2002: 109). The Excellence study researchers have acknowledged that these are not “hard” precise measures, but argue that they provide “strong statistical evidence of the value of public relations” (J Grunig, L Grunig and Dozier, 2006: 32).

A number of other related theoretical concepts are also available, such as Benefit Cost Ratio (BCR) and Cost Effectiveness Analysis (CEA) developed by Fraser Likely (2012; see also Likely and Watson, 2013). While similar to ROI in some respects, BCR uses the economic concept of *compensating variation* that was discussed in the first Excellence study book by William Ehling (1992) and in Grunig et al. (2002: 116–21). While sounding complex, compensating variation is based on a simple idea: ask stakeholders how much they would be willing to pay for a non-monetary benefit. In the case of PR, practitioners can ask senior managers how much they believe a good reputation or positive relationships with key publics are worth to the organisation. The Excellence study authors concluded that “compensating variation provided the best method known to date to estimate the value of relationships cultivated by public relations” (Grunig et al., 2006: 31).

Furthermore, while the PR industry struggles onwards in its 40-year quest for a viable and credible approach to measurement of its value, the International Integrated Reporting Council (IIRC) has been established and developed an International Integrated Reporting Framework that has been endorsed by a substantial number of the world’s leading corporations including PepsiCo, Unilever, HSBC, Deutsche Bank, Hyundai Engineering and Construction and National Australia Bank (NAB). Integrated reporting (IR) identifies a number of types of capital which affect an organization’s ability to create value over time, including manufactured, intellectual, human, natural, and *social and relationship* capital, as well as financial capital (IIRC, 2013: 4) [emphasis added]. The IIRC says “the ability of an organization to create value for itself ... happens through a wide range of activities, interactions and relationships” (IIRC, 2013: 10), which makes Integrated Reporting highly relevant to PR and corporate communication.

While theories and concepts such as cost benefit analysis as expressed in compensating variation and BCR and Cost Effectiveness Analysis (CEA) have limitations, they offer frameworks and approaches that have not been widely applied by practitioners – in fact, it is rare to find them in practice judging by industry literature which seldom mentions them. Some other methods, such as *market mix modelling* advocated by Weiner (2006), *communication controlling* or *communication performance management* (Zerfass, 2010), *logic models* to connect PR processes to organisational outcomes (Macnamara, 2013), and Integrated Reporting (IIRC, 2013) are similarly not embraced by PR practitioners, who Likely and Watson (2013: 156) argue continue to look for a ‘silver bullet’ – a single, simple solution that requires little work or cost.

Conclusions

Beyond the common excuse of lack of budget for measurement and evaluation, at least four answers to the first question posed above emerge from this analysis. The industry is going round in circles and failing to advance towards credible and reliable measurement and evaluation because (1) practitioners have not adopted and deployed tested theories and models of measurement and evaluation that have been developed; and (2) there has been a lack of engagement by practitioners with PR and social science academic researchers including during the latest attempts to develop standards, which has resulted in insular debates and simplistic solutions. These factors have been exacerbated by (3) a preoccupation with finding a mythical magic formula or silver bullet; and (4) commercial pressures from suppliers which have a vested interest in promoting particular proprietary solutions. It follows that answers to the second question in relation to closing these cracks and gaps and finding a way forward involve reversing these four problematic trends, or at least balancing interests and perspectives.

It would be unfair and unproductive, however, to assume that practitioners and suppliers are the ones who need to change and that academics simply need to be invited into discussions and listened to for the problems to be resolved. This analysis has shown that there are inconsistent and conflicting views among scholars and some significant anomalies in academic literature which warrant attention, even at the level of basic message and channel metrics. While agreeing with Likely and Watson that the measurement and evaluation of “products/channels/messages and of programs/campaigns have seen a considerable quantity of research from academicians and practitioners”, this analysis challenges their claim that “the problems have been solved at both levels” (2013: 156). Definitional inconsistency in relation to reach, audience, impressions, tone, sentiment and manifest and latent content analysis identified in this review show that there is still work to be done even at the basic channel, message and program levels of measuring PR. Several of the standards adopted, as well as some scholarly guides including the *Dictionary of Public Relations Measurement and Research*, need review and reconsideration in places.

This analysis also cautions against academic complacency implicit in reviews that suggest that the answers have been there all along in the Excellence study and other theories and models – all practitioners need to do is adopt them. As Likely and Watson (2013) acknowledge, there is still much work to be done by both academics and practitioners at the *functional*, *organisational* and *societal* levels of PR measurement and evaluation (Grunig et al., 2002: 91–2). In this regard, one area of academic research that could bring new insights to measurement and evaluation is the emerging body of work on sociocultural PR (Edwards and Hodges 2011). This specifically focusses on the societal dimensions and implications of PR, which are largely ignored in functionalist organization-centric PR literature. Critical PR scholars have to date not engaged in any significant way in the discussion of standards for measurement and evaluation and their contribution would offer an additional useful perspective and advance critical theory towards *praxis*, which Marx (1845) drawing on Hegel identified as a necessary element of critical work. In fact, measurement and evaluation should be central to critical PR scholarship which is interested in who is impacted by PR and how. It could be argued that if PR has no impact, there is no basis for critical scholarship.

Within traditional measurement and evaluation scholarship, a greater focus on in-depth qualitative research is a desirable future direction, as work to date has focussed primarily on quantitative metrics. The PR industry has identified a wide range of metrics, as shown in Table 1, most of which can be calculated and tabulated but add up ultimately to no more than floating signifiers¹ (e.g., ‘reach’, ‘clicks’ or Facebook ‘likes’). Identifying cognitive,

emotional and cultural factors that are causally linked to outcomes, such as changes in attitudes and behaviour, which usually occur over time and as a result of multiple influences, requires advanced qualitative methods such as longitudinal interview-based studies, ethnography and even ethnomethodology.

Furthermore, the fact that practitioners still do not consistently or rigorously implement measurement and evaluation after 40 or more years of scholarly research and debate, suggests that scholars need to examine their research in terms of *impact* and reflectively and reflexively consider what more can be done to connect theory to practice. While some scholars actively engage in industry discussion through conferences and professional journals, perhaps it is time for scholars to focus less on PR having a seat at the boardroom table and aligning to management, which is widely advocated in PR literature, as Bowen (2009) has noted, and focus more on taking a seat at the industry table, including seeking participation of a panel of academics in initiatives such as the Coalition for Public Relations Research Standards and reaching out to organizations such as the International Integrated Reporting Council.

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¹ 'Floating' signifier is a term used in semiotics to denote signifiers (arbitrary signs such as words or numbers) without referents – that is, ones that do not point to any actual object or agreed upon meaning.