Demonstrating value:

How and to what extent public relations practitioners can better measure the impact of their work.

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Abstract

This research aimed to create an understanding of how public relations (PR) practitioners in North America currently measure and evaluate their work and what gaps or barriers prevent them from using more strategic methods, as well as how industry measurement and evaluation (M&E) thought leaders and experts recommend practitioners engage in meaningful M&E initiatives. Research methods included a survey of Canadian PR practitioners and interviews with North American and European C-suite communicators and communications experts and thought leaders. While survey results indicated some use of measurement and evaluation practices, there were significant inconsistencies and indications of lack of knowledge of how to use research to understand audiences, conduct environmental scanning, set SMART objectives and measure communications impact in a way that demonstrates alignment with the organization's goals. Using the learnings from this research, the researcher created a guide for public relations practitioners not currently measuring and evaluating their work to begin a measurement and evaluation program to support more strategic, effective work.

Key words: measurement, evaluation, two-way symmetrical communication, outcomes, impact, research, data

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Introduction

In theory, public relations (PR) practitioners contribute to organizational, societal and stakeholder change (Macnamara, 2018a): they can help increase sales and donations, support the improvement of public health through increased screening rates and uptake of vaccines, help an organization's reputation improve, to name just a few. Yet proving their work has had an impact requires specific knowledge, expertise, time and resources to measure and evaluate associated metrics before, during and after campaigns. While it may sound simple, measurement and evaluation (M&E) remains one of the top workplace issues for public relations practitioners globally (Cacciatore & Meng, 2022). Too often, PR practitioners focus on *vanity metrics* – how many people saw a post, how many articles the organization was quoted in – which provide no context about what audiences *did* with the messaging: did they take an action or have a mindset/behaviour change (Macnamara, 2023)? This presents an issue for countless reasons, including that it prevents practitioners from truly understanding the impact of their efforts and being able to nimbly pivot or modify their strategy if it is not working to achieve their objectives. A solid M&E program can help PR practitioners be more efficient, effective and enhance their value in the eyes of their organization's executive team, which can lead to practitioners' involvement in the dominant coalition and strategic decision making and therefore increased status and influence (Grunig, 2013). Critically, using data can also move PR practitioners away from relying on instinct or subjective experience and improve their business credibility (Bradbury, 2023; Paine, 2007).

This research aimed to create an understanding of how PR practitioners in North America currently measure and evaluate their efforts and what gaps or barriers prevent them from using more strategic methods, as well as how industry M&E thought leaders and experts recommend practitioners engage in meaningful M&E. As part of this research, the researcher created a guide (see Appendix A) to support organizational communications' functions in establishing M&E programs, with a specific focus on smaller organizations lacking budgets for outsourcing M&E to a third party or paying for sophisticated M&E tools.

Literature review

Excellent PR/excellence (effectiveness)

The excellence theory was born out of a 15-year study about best practices in communications management that was tested through survey research and qualitative interviews with PR leads, practitioners and CEOs (Grunig, 2013). The theory suggests that PR provides the most value to its organization and the broader society when it helps the organization solve problems and achieve goals for both the organization and its stakeholders, understood through dialogue with stakeholders that leads to high-quality relationships (Grunig, 2013). To be able to do this, Grunig (2013) wrote, "Public relations must be organized in a way that makes it possible to identify strategic publics as part of the strategic management process and to build quality long-term relationships with them through symmetrical communication programs" (p. 9). While the researchers admitted that calculating an exact return on investment for communications can be challenging, Grunig (2013) highlighted that strong, long-term relationships between the organization and its stakeholders "reduced the *costs* of litigation, regulation, legislation, and negative publicity caused by poor relationships; reduced the *risk* of making decisions that affect different stakeholders; or increased *revenue* by providing products and service needed by stakeholders" (p. 9).

The excellence study specifically called out six key areas that helped determine or lead to excellent public relations: PR is involved in strategic management; PR is integrated in a single department as opposed to sublimated to marketing or other management functions; internal communication is also symmetrical to help increase employee satisfaction; organizations with excellent PR functions value women as much as men and have programs to empower them; diversity, race and ethnicity are considered; and PR provides an ethical conscience in the organization (Grunig, 2013).

Understanding the value of public relations is crucial to begin to identify areas where PR practitioners can measure the impact of their efforts – relationship strength, successfully identifying and mitigating potential issues and increasing revenue by helping the organization provide products and services stakeholders want are examples of PR using its position to support both the organization and its stakeholders.

Stakeholders/audiences/publics

Despite being used interchangeably, there are significant differences between the terms publics, audiences and stakeholders. Wakefield and Knighton (2019) explain that stakeholders are connected to organizations, audiences are connected to messages and publics are connected to issues.

Stakeholders

A stakeholder is "any group or individual who is affected by or can affect the achievement of an organization's objectives" (Freeman, 1984, p.1 as cited in Wakefield & Knighton, 2019, p. 2). Stakeholders are connected to an organization through different forms of linkages: enabling (they *enable* the organization to run through funding, governance, etc.), functional (they help the organization *function* through providing supplies, labour, consuming products or services, etc.), diffused (they do not frequently engage with the organization but may in an event like a crisis) and normative (they have similar interests, such as competitors) (Rawlins, 2006). The most common stakeholders for an organization include shareholders, employees, customers, suppliers and communities (Rawlins, 2006). It is suggested that those with functional and enabling linkages should be considered highest priority because of the organization's dependence on them (Rawlins, 2006).

Stakeholder typology suggests stakeholders can be grouped based on their levels of power (ability to influence others to make decisions they would not have otherwise made), legitimacy (having a "legal, moral, or presumed claim that can influence the organization's behavior, direction, process or outcome" (Rawlins, 2006, p. 5)) and urgency (having a time-sensitive claim or relationship that is important to the stakeholder) (Rawlins, 2006). The various combinations of these factors can create a prioritization strategy: definitive stakeholders have power, legitimacy and urgency, expectant stakeholders have two of the three and latent have none (Rawlins, 2006). Prioritizing based on these factors must be frequently done as stakeholders may shift which attributes the hold at any given time depending on the situation; as an example, Rawlins (2006) suggests that a dangerous stakeholder (power and urgency but no legitimacy) can become a definitive stakeholder if it gets legitimacy as has happened with nongovernmental organizations.

Audiences

Where stakeholders are connected to an organization, audiences are connected via their individual link to a message or event – for example, sitting in a movie theatre watching the same movie (Wakefield & Knighton, 2019). When organizations send out messages, they are typically sending them to audiences, looking for people to act on the messages as individuals (i.e., buy a product, change their behaviour, attend an event) rather than asking for a group to organize and work together on something (Wakefield & Knighton, 2019). However, those audiences can become (unanticipated) publics if they identify an issue and act together on (Wakefield & Knighton, 2019).

Publics

Publics are groups of individuals who organize to act, often because they are opposed to something (Wakefield & Knighton, 2019). They are connected to the issue, not necessarily an organization – but could be connected to an organization if, say, the organization had announced it was doing something and a group advocated against it (Wakefield & Knighton, 2019). For example, a recent public was formed in Minden, Ontario; the hospital announced it was closing its emergency department which led a group to organize to advocate against the closure, hosting town halls and gathering petition signatures (Davis, 2023). In this case, the hospital was interacting directly with this group, rather than just with individuals. Because publics often target organizations with their actions, they are frequently viewed by organizations as negative (Wakefield & Knighton, 2019).

Valentini et al. (2012) highlighted that organizations do not create or control publics; they can only cultivate relationships with publics; “publics form chaotically and create communities and tribes outside of the influence of organizations” (p. 876). For this reason, the authors suggest that organizations must realize they are part of a broader society to which they have a responsibility – they cannot be focused solely on their own self-interests. Valentini et al. (2012) highlighted organizations’ roles as helping find common interest between organizations and publics to contribute “to the restoration and maintenance of a sense of community" (p. 875). Grunig (2013) likewise suggested that "public relations can help to 'manage' reputation by cultivating relationships with publics and encouraging management to make socially responsible decisions" (p. 16). Grunig (1997) suggested that "Organizations need public relations because their behaviours create problems that create publics, which may evolve into activist groups that create issues and threaten the autonomy of organizations" (p. 9).

In our *digimodern* society connected via the internet and social media, publics can be more far-reaching and complex than in previous years – they are no longer limited by qualities like geography, religion, class, culture, etc. (Valentini et al., 2012). Climate change is an example of an issue that has created global publics committed to addressing the issue (Valentini et al., 2012). Connected to this, organizations should consider their *unanticipated publics*: those groups who form once a message is received and they are triggered by it, positively or negatively, in some way. The term *unanticipated publics* is meant to replace one that is frequently used by PR practitioners – *general public* – to describe when a message is sent out broadly and unintended recipients may see or act on it. Wakefield & Knighton (2019) suggest that the term general public is meaningless because, for a general public to exist for a given message:

> everyone in a given society would need to (1) have an equal opportunity of receiving and acting upon the message, and (2) care about the message enough to feel a need to respond or act on it. If such a public indeed existed, there would be no need for targeting any specific group. (p. 4)

Wakefield & Knighton (2019) suggest that organizations who make predictions about how unanticipated publics will respond to their messages "will have a better chance of being proactive in their relationship building with their audiences and stakeholders *and* with the various publics that are affected by or can affect the organizations' behaviors and direction" (p. 4).

The situational theory of publics. PR practitioners can use the situational theory of publics to help strategically segment publics, understanding publics' relationship to an issue and likelihood to act on it (Grunig, 1997). The theory looks at three independent variables – problem recognition, level of involvement and constraint recognition – that influence how likely an individual or public is to engage in finding information about an issue either actively or passively (Kim & Grunig, 2011). At the top end, "a person who perceives a problem, a connection to it, and few obstacles to doing something about it is likely to seek and attend to information about the problem" (Kim & Grunig, 2011, p. 121). By understanding which publics are active (compared to latent or non-aware), PR practitioners can use their resources more efficiently to target those specific groups, instead of doing a campaign to the *mass public* (Kim & Grunig, 2011). It is also important to note that there are four types of publics associated with this theory based on the level of engagement in issues: all-issue, apathetic, single-issue and hot-issue publics (Grunig, 1997).

The situational theory of problem solving. An evolution of the situational theory of publics, the situational theory of problem solving added the idea that publics participate in communicative action in problem solving (CAPS) which includes active behaviours such as sharing information about an issue with others, bringing the number of independent variables to four: perception, cognition, motivation and communicative behaviours (Kim & Grunig, 2011). Notably for PR practitioners, these variables can be measured: as Kim & Grunig (2011) highlight, traditional campaigns often seek to "increase knowledge, favorable attitude, and desired behaviors of… target publics" (p. 132). But this is difficult to do, for example, in a health campaign that is one-way and based in persuasion. Measuring individuals' awareness of the issue, perceived constraints and willingness to share information about it may provide richer data about the campaign's impact (Kim & Grunig, 2011). Kim & Grunig (2011) suggest that the situational theory of problem solving can also help set better objectives – for example in campaigns about health risks "to increase the sense of seriousness and connection to the health risks (increasing problem recognition) and lift the barriers for members of publics to do something about the problem (decreasing constraint recognition)" (p. 132). They go on to suggest that "the effectiveness of organizational policy and communication programs can be tracked by the changes in levels of problem and involvement recognition and constraint recognition" (p. 135).

The impact of PR should be positive for both organizations and the people it interacts with – stakeholders, audiences and publics – and understanding the difference between the three helps practitioners better determine both who they are trying to reach with their efforts and how they can identify, segment and prioritize those groups. This is critical as PR practitioners set their objectives, evaluate the extent they achieved them and gather feedback to support better future efforts.

In this study, the researcher used the theoretical assumption that many PR practitioners use the terms stakeholders, audiences and publics interchangeably. For this reason, the researcher chose to only use the term *audiences* in data collection to avoid confusion.

Two-way symmetrical communication

How PR practitioners communicate with an organization's stakeholders, audiences and publics has long been a topic of interest, concern and criticism in PR practice and academia (Grunig, 2001). The ideal method is two-way symmetrical communication where practitioners "use research and dialogue to bring about symbiotic changes in the ideas, attitudes, and behaviors of both their organizations and publics" (Grunig, 2001, p. 12). This is different than a press agentry/publicity model where practitioners solely broadcast information, public information model where in-house *journalist*-style practitioners write and then share information and two-way asymmetrical model where practitioners conduct research that informs their actions to have the best chance of persuading stakeholders, audiences and publics (Grunig, 2001). The mixed-motive model of PR, a combination of two-way symmetrical and two-way asymmetrical, is often mentioned as better than the two-way symmetrical model however, Grunig (2001) outlines that its description, where "organizations try to satisfy their own interests while simultaneously trying to help publics satisfy their interests" (p. 12) is what was originally intended by his two-way symmetrical model. He says that "persuasion is still a relevant concept in the symmetrical model. The difference is that the public relations professional sometimes must persuade management and at other times must persuade a public" (p. 13).

Cultivating high-quality relationships between an organization and its stakeholders, audiences and publics has been highlighted as a defining feature of PR that separates it from other functions like marketing and advertising (Smith, 2012). For these relationships to be successful however, dialogue must occur, and that has been poorly understood and practiced by many PR practitioners because true dialogue requires the relinquishing of control over the outcome (Theunissen & Wan Noordin, 2012). Theunissen and Wan Noordin (2012) argue that if practitioners engage with a group where they are anticipating what they would like the result to be, they are not participating in authentic dialogue. In fact, Theunissen and Wan Noordin (2012) suggest that “when the motives for engaging in dialogue are about persuading its stakeholders, risk to and vulnerability of the stakeholders increases, raising ethical concerns” (p. 7). Research has found that symmetrical communication and dialogue have been used by some organizations to gather information to identify how to make small concessions that allow them to “maintain social order and to preserve their own hegemony” (Grunig, 2013, p. 18). Coorientation, referred to as the parent of the symmetrical model, suggests that communication should be used to adjust ideas and behaviours to others “rather than to try to control how others think and behave” (Grunig, 2013, p. 6). This is risky though – critics have suggested that PR supports business goals:

> to make profit by increasing revenues through publicity, to improve operation efficiency through employee communication, to get as much freedom as possible through influencing public opinion so they can operate their business without (governmental) constraints, to increase competitiveness through managing issues (and we could add crisis management as part of this), and to promote corporate values and acceptance of these values. (Theunissen & Wan Noordin, 2012, p. 7)

Theunissen and Wan Noordin (2012) argue that dialogue is not required for any of these, but publicity and persuasion are. When true dialogue requires a willingness to cede an organization’s carefully crafted image to show up authentically, the possibility that the result will be unpredictable and may in fact lead to further disagreement, it is not surprising that PR practitioners are hesitant to engage in dialogue when the risks are so high.

Further to this, the idea of dialogue requires both talking and listening and yet, a wide-reaching study found that listening is not employed by many or even most PR practitioners (Macnamara, 2016). Rather, it found a higher likelihood of organizational *speaking* or what the author described as *SOS*: sending out stuff (Macnamara, 2016). This goes against the basic principles of two-way symmetrical communication which “sets the stage for mutual influence. You cannot be influenced by a group if you never hear it" (Coombs & Holladay, 2007, p. 46, cited in Macnamara, 2016, p. 163). Organizational listening and dialogue/engagement are not just a nice to have, they can "result in increased employee retention and productivity, increased customer loyalty, improved customer service, reduced industrial disputation, and reduced crises and conflicts affecting organizations" (Macnamara, 2016, p. 164). Macnamara made the reason this is important tangible, saying that PR's job is to inform and persuade people – which will happen more effectively if practitioners understand who their stakeholders, audiences and publics trust and where they get information (Sydney Lectures, 2022). He highlighted the importance of this during the COVID pandemic – knowledge gathered through organizational listening helped craft strategies such as the United Kingdom's government engaging with local physicians to get them to deliver the message about the importance of getting vaccinated (Sydney Lectures, 2022). Macnamara (2016) said *effective ethical listening* requires a culture opening to listening, listening policies, open/interactive systems to get feedback, monitoring/technology tools to support listening, staff to do the listening, skills to listen effectively and a process for learnings to flow back through the organization to impact policy and decision making.

If a key outcome of PR practitioners' work is to build and strengthen relationships with key stakeholders, audiences and publics, it is critical they understand and effectively use recommended methods of doing so including dialogue and organizational listening.

Environmental scanning and benchmarking

Information gathering is a critical part of PR; practitioners must understand what is happening outside of their organization to identify potential issues and opportunities, who they need to be talking to (stakeholders/audiences/publics) and what their needs are, what their competitors are doing and more to guide their efforts. This work can and should happen through both environmental scanning and benchmarking.

Environmental scanning

The excellence theory includes environmental scanning as a practice of the top PR functions: "The most excellent departments participated fully in strategic management by scanning the social, political, and institutional environment of the organization to bring an outside perspective to strategic decision-making" (Grunig, 2013, p. 12). Dozier (1986) found that there was a correlation between practitioners conducting environmental scanning and having a strategic (manager) role because "managers…are expected to solve problems between the organization and publics. Such problem solving requires an understanding of 'what's going on out there'" (p. 17). While there is no one accepted way to conduct environmental scanning, Dozier (1986) suggested there are buckets different methods can fit into: scientific (i.e., formal studies and surveys, etc.) and informal (i.e., phone calls, in-depth interviews with members of the organization's publics, identifying trends in media, holding work-group meetings with staff, etc.). Research has shown that personal contacts such as customers, journalists, supervisors and employees can be better sources of environmental information than impersonal contacts such as media and public opinion polls (Grunig, 2013). Grunig (2013) pointed to work highlighting that an ideal environmental scanning process should include:

> monitoring strategic decisions of management to identify consequences on publics, monitoring web sites and other sources of information from activists, using the situational theory to segment publics, developing a database to analyze information, and monitoring media and other sources to track the process of issues management. (p. 12)

The field of strategic management includes environmental scanning as a prerequisite to creating a strategy; before moving ahead with a plan, it is necessary to understand the space one will be operating in, including "economics, drivers of profitability, and… key success factors to understand what it takes to win in an industry" (Crossan et al., 2016, p. 62). For this reason, there are numerous models to understand current environment including the SWOT analysis, PESTLE, Porter's Five Forces, blue ocean strategy and so on. These types of models could be used by PR practitioners to identify issues, threats and opportunities.

Benchmarking

If environmental scanning is focused externally away from PR looking at the organization and broader society in which it operates, benchmarking is more internally focused on the PR practice and how it compares to its competitors and leaders in the profession. It is meant to be an ongoing approach to understand how the PR function compares to others to help improve its own performance (Fleisher & Burton, 1995). Benchmarking can lead to better communications, a more scientific rather than intuitive approach to efforts, actionable insights on areas to improve efficiency and effectiveness and an increased ability for the PR function to adapt or change, better plan and evaluate resource allocation and improve decision making (Fleisher & Burton, 1995). Fleisher and Burton (1995) quoted a communicator who said:

> benchmarking can't ensure that I'll always make good decisions, but it can ensure that my decisions will be made on systematically derived evidence… [which] gives me a much better chance of convincing my boss of the appropriateness of our strategies. (p. 5)

When looking at ways to create impact, environmental scanning and benchmarking can help practitioners better understand the environment they are operating in and lessons learned from their competitors, peers and leaders in PR to improve their own efficiency and efficacy.

Measurement and evaluation (M&E)

PR M&E helps determine the effectiveness and/or value of efforts; short-term, identifying whether and how PR strategies, tactics, etc. supported the success or failure of PR objectives; and long-term identifying a PR program's success or failure at supporting the strengthening of relationships between the organization and its key publics and achieving organizational goals (Lindenmann, 2003).

> PR *measurement* is a way of giving a result a precise dimension, generally by comparison to some standard or baseline and usually is done in a quantifiable or numerical manner… [and] PR *evaluation* determines the *value* or importance of a PR program or effort, usually through appraisal or comparison with a predetermined set of organization goals and objectives. (Lindenmann, 2003, p. 2)

Finding an effective way to measure and evaluate communications efforts has been said to be the *holy grail* in the field and has led many practitioners to attempt to identify a *silver bullet* or one singular measure that proves the field's value (Buhmann et al., 2019; Likely & Watson, 2013). The Excellence Study found that PR can add value on five levels: individual messages or publications; programs or campaigns; functions or departments; organizational or enterprise; and societal levels (Likely & Watson, 2013). The study also found that most research and work has been done on evaluating the first two levels, despite their lack of ability to show PR's true value to an organization including the strength of relationships the organization has with its stakeholders and publics and the impact the organization's work has on society (Likely & Watson, 2013). Grunig (2008) wrote that "Effective organizations are able to achieve their goals because they choose goals that are valued by their strategic constituencies both inside and outside the organization and also because they successfully manage programs to achieve those goals" (p. 96) and that ineffective organizations have difficulty achieving goals because their publics do not support those goals. He continued:

> Public relations makes an organization more effective, therefore, when it identifies the most strategic publics as part of strategic management processes and conducts communication programs to develop effective long-term relationships with those publics. As a result, we should be able to determine the value of public relations by measuring the quality of relationships with strategic publics. (Grunig, 2008, p. 97)

Proving its value is not a nice-to-have for a PR function; it can impact its ability to provide strategic support in the organization. The Excellence Study found that excellent PR should have a seat in the dominant coalition and support strategic decision making, yet "public relations could not have a role in strategic management unless its practitioners had a way to measure its effectiveness" (Grunig, 2013, p. 7). To assist as a strategic function, PR needs to evaluate whether objectives were met and how they were (or were not) met to allow for future improvements (Buhmann & Likely, 2018). As Buhmann highlighted, "strategic communication needs to be evaluated not just in terms of the intended effect of a message, product or campaign but also in terms of its broader strategic and operational contributions for the whole organization" (p. 13). This helps enhance PR's value to executives; Macnamara suggested that communications is often seen as a cost centre, spending the organization's money, until the point at which the function can demonstrate outcomes and impact when it becomes a value-adding centre (European Committee of the Regions, 2016).

Where PR fits in to an organization can also impact what it measures; research has found that when PR reports directly to the C-suite, it is more likely to be strategic, measuring factors such as crisis avoidance, reputation, employee attitudes and stakeholder opinions. When PR reports to marketing, it is more likely to focus on evaluating its contribution to sales and media coverage (International Association of Business Communicators, 2007).

Current state

A recent global survey found that measurement was the third most important issue facing communications leaders after increasing volume flow and the digital revolution (Cacciatore & Meng, 2022). There are countless reasons why M&E are not done regularly by practitioners including lack of budget, time, data, knowledge (including academic preparation), tools, industry standards and support or understanding from senior executives (Arenstein, 2021; Buhmann et al., 2018). Grunig suggested another one as fear that evaluation would show practitioners' efforts are not working, (International Association of Business Communicators, 2007). Some also have negative associations with being evaluated. When this became an issue during work he was doing for the World Health Organization, Macnamara changed the framing: instead of referring to an M&E program, he changed it to MEL – measurement, evaluation and learning to emphasize it was not about criticizing but rather improving communications efforts (Amecorg, 2023).

Macnamara (2007) suggested that most practitioners do not use research to measure because they do not see it as relevant: "When one focuses on and sees one's job as producing outputs such as publicity, publications and events, measurement of effects that those outputs might or might not cause is an inconsequential downstream issue – it's someone else's concern" (pp. 6-7). Macnamara raised the idea of *functional stupidity* – "illogical outcomes at a function level – not individual activity" (Macnamara, 2018b, para. 7) suggesting that some practitioners overpromise to win pitches or impress management:

> In such situations, rigorous evaluation is not in the interest of practitioners in PR and communication management. It is actually in their interest to avoid rigorous evaluation or to use

> simplistic methods that show activities and outputs rather than outcomes or impact. (Macnamara, 2018b, para. 8)

Macnamara (2007) suggested that PR practitioners have "evolved to be predominantly **intuitive**, **author-centric** and concerned primarily with producing **outputs**, whereas communication scholars, researchers and social scientists take an approach that is **scientific**, **audience-centric** and concerned with **outcomes**" (p. 8).

Often, even when PR practitioners do measure, they only look at/prioritize vanity metrics such as media pickup or social media impressions, which provide no insight on whether message receivers retained or believed the information or did anything differently as a result (Macnamara, 2023). Two studies across more than 60 countries showed that press clippings, media analysis and web tracking were the most popular M&E methods for PR practitioners while research on attitude or behaviour change or more sophisticated methods were rarely used (Buhmann & Volk, 2021). Part of this issue is a lack of knowledge; research in 2021 found that 40% of PR practitioners lacked data competency (Meng et al., 2021).

A lack of demonstrating value is mimicked in research: a systematic review of PR evaluation and measurement found that there was no guiding theory or "coherent theoretical body of knowledge within evaluation and measurement research" (Volk, 2016, p. 969) and that, while how to measure relationships and reputation have been the highest researched topics, the lowest have been assessing the overall value of PR and measuring other intangible values.

Despite all this, PR practitioners acknowledge the benefit of focusing on outcomes and impact: a 2023 survey of PR professionals identified producing measurable results and tying PR activity to business impact as the top two ways of increasing the value of PR among internal stakeholders (Muck Rack, 2023). A 2023 study on the future of corporate communications found that, while chief communications officers were more respected and relied on by their CEO than in previous year, they were "still struggling to receive the consistent support needed to evolve… in part, [due] to the ongoing difficulty of directly linking communications activities to business outcomes" (Edelman, 2023, p. 8).

Principles and frameworks

While there is no one accepted way to measure and evaluate communications efforts, several frameworks and principles provide a place to begin. The integrated evaluation framework from the International Association for Measurement and Evaluation of Communications (AMEC) is an online tool that provides a step-by-step guide for PR practitioners to think about M&E in their campaigns (AMEC, n.d.-a). Based on a program logic model, the framework begins with organizational and communication objectives and ends with organizational impact (i.e., did the campaign lead to change in reputation, relationships, reaching targets, increased staff loyalty and retention, organizational change, social change, etc.) (AMEC, n.d.-c). For each step, the framework provides a definition as well as examples. Critically, it differentiates between key terms that are often confused or used incorrectly by PR practitioners: outputs (content, materials, activities to get the message out), outtakes (target audiences' initial responses/reactions), outcomes (measurable effects on the audience such as knowledge, trust, preference, intention, attitude or behaviour change, advocacy) and impact (AMEC, n.d.-c). The distinction between tactics the communicator used (outputs) and the effects it had on the audience (outtakes, outcomes, impact) is key as, for example, PR practitioners often highlight media uptake (an output) as a signal their campaign was successful, despite the nuances associated with media – such as lack of trust in it, conflicting messages, lack of recall – which suggest just because an article was published, it did not have the desired effect (Pawinska, 2023).

Another frequently referenced resource in this area includes the Barcelona Principles (BPs), a list of seven statements that outline key ideas about PR M&E, such as "setting measurable goals is an absolute prerequisite to communication planning, measurement, and evaluation" and "holistic communication measurement and evaluation includes all relevant online and offline channels" (AMEC, n.d.-b). However, some criticism has suggested that the BPs are too general and, despite their continued modification over the years, have not included an education plan, so rather than being adopted by practitioners, they are more like *soft* guidelines for consideration (Buhmann et al., 2019; Michaelson & Stacks, 2011). In fact, that is one of the biggest criticisms of most of the frameworks that have been created for PR: inconsistent adoption and use. Some have suggested this may be due to a belief by practitioners that PR is just *different* and so cannot have one standard, or that consultants are using their own proprietary methods which cannot be independently replicated and tested (Michaelson & Stacks, 2011).

A lack of universally adopted standards is a miss because it “leads to a lack of compatibility with organization-wide evaluation procedures and hampers the comparability of measurement and evaluation of strategic communication between organizations” (Buhmann & Volk, 2021). Standards help practitioners understand how they are performing compared to their peers within and outside of their organization to improve their efficacy; using what is known to work can help “save us time, effort, and allow us to deliver better research, measurement, and evaluation” (Geddes, 2011). Some warn that if PR practitioners do not have their own standards, clients will impose theirs on them (Institute for Public Relations, 2012). Michaelson and Stacks (2011) highlighted that even measures that seem simple to measure need to be standardized because the way people go about measuring can be quite different; they referenced one study which had five evaluation agencies look at the same briefing document featuring 138 media stories. The agencies came back with completely different analyses; when asked to identify sentiment analysis, for example, results ranged from 17 to 100 per cent positive (Michaelson & Stacks, 2011). Thus, it is not enough to measure but to measure in such a way that results will be valid, reliable and replicable: “standardization of public relations measures requires significantly more than a description of the measure to be included in the analysis, but the implementation of specific research procedures and protocols that will be applied uniformly and consistently” (Michaelson & Stacks, 2011, p. 9).

Controversy

When evaluation is done, it is often criticized for being done poorly: using substitution fallacies, referencing proven ineffective methods such as ad value equivalency (AVEs), trying to fit PR into the financial *return on investment* (ROI) language or even making up metrics (Buhmann et al., 2019; Macnamara, 2023; Paine, 2023).

Substitution fallacies happen when practitioners substitute a metric at one level for another; an example is suggesting that the potential media reach of a story demonstrates organizational impact such as improved reputation (Macnamara, 2023). Being quoted in media can be important to track if it is aligned with the campaign's objectives but simply being quoted in the media does not indicate any outcome-based change such as knowledge/attitude/trust/preference/etc. (Macnamara, 2023).

AVEs, which suggest that an appearance in a media story can be attributed a dollar value by equivalating how much money it would cost to pay for a similar ad placement, have long been a source of contention in the industry. In fact, one of AMEC's Barcelona Principles is the clear direction that "AVEs are not the value of communication" (AMEC, n.d.-b). In a *say no to AVEs* campaign, AMEC listed 22 reasons they were an ineffective measurement, including that AVEs do not account for target audiences, coverage quality or sentiment (i.e., positive versus negative) and that AVEs are a vanity metric that may look impressive but are ultimately meaningless (Bagnall, n.d.). A 2020 report found that almost half of industry leaders were still using AVEs globally almost ten years after AMEC's campaign, though its use had decreased in North America (Holmes, 2019). Macnamara (2023) tied this ongoing use of AVEs to the idea that measurement has long been media-centric, rather than audience-centric, a trend he suggests needs to change given the vastly different landscape PR practitioners operate in now with social media providing a direct connection to audiences.

Connected to the idea of measuring the financial value of PR is the controversial use of the business term *return on investment (ROI)*. One of the largest concerns with the use of ROI is that PR activities are difficult to measure in financial terms because they happen alongside other communications and business efforts and often focus on numerous non-financial outcomes such as strength of relationships (Likely & Watson, 2013). While Grunig has suggested the financial returns from strong relationships can be measured (i.e., in avoided costs, risks and increased revenue), estimating the associated financial costs with maintaining the relationship can be challenging because "they are long-term, lumpy, and often keep things from happening" (Watson et al., 2011). Indeed, in a true dialogue, both sides may disagree – how does one measure the ROI when it is not positive (Theunissen & Wan Noordin, 2012)? In Watson et al.

(2011), Grunig suggested "we should measure relationships but explain their value conceptually to understand (but not measure) the ROI of public relations" (para. 10). Other experts suggest PR practitioners use the language of business such as *return on investment* only for short-term campaigns where a direct link can be made between a campaign and sales or reputation, as opposed to longer term strategies for example increasing awareness and understanding (i.e., health promotion programs, supporting the creating of a policy, etc.) (Watson & Zerfass, 2012). PR practitioners may also use proxies to demonstrate movement towards business goals; for example, a 2022 study found that PR (via positive news) is more effective than marketing in driving lower marketing funnel metrics such as purchase intent (Dwyer et al., 2022). Notably, experts provide reminders that in any case, it is important to use the term *correlation* instead of causation when referring to PR efforts as multiple external factors may influence an audience's response (unless conducting a scientific, randomized control trial) (Bruce, 2018; Lindenmann, 2003).

Finally, Paine (2023) highlighted the "top 10 PR measurement atrocities" in a blog post earlier this year. These included making up metrics in a variety of ways: giving banner ads a dollar value, cutting out data from various sources to make results seem more impressive and adding multipliers to certain media outlets or types of stories.

Ironically, while many in PR look for a single evaluation method to prove their impact (often related to media via AVEs or ROI), business has introduced techniques like the balanced scorecard and triple-bottom-line reporting which highlight that numerous factors need to be considered to demonstrate value (Gregory & Watson, 2008).

Best practices

One common misconception is that M&E only happen at the end of a PR campaign. While summative evaluation is important, experts highlight that formative research – before a campaign begins – is critical as it allows PR practitioners to set specific, measurable, achievable, relevant and timebound (SMART) objectives more effectively with information about their audiences in mind (IPR Measurement Commission, 2022; Matsuitz, 2022). Matusitz (2022) suggested that formative research "is often hailed as the most important factor in the design and implementation of a successful campaign" as it helps "identify the stance, knowledge, and needs of the target group *vis-à-vis* a specific issue" (ch. 10, formative research section). Engaging in some form of M&E before a campaign is also critical to establish a baseline; as one measurement expert put it, "How can you measure if you don't know where you're starting?" (Bradbury, 2023).

Using research to set SMART objectives allows PR practitioners to prioritize their strategy and tactics, be more efficient and help ensure the campaign ladders up to the business objective (Anderson et al., 2009). The better practitioners understand their target audiences including their beliefs, needs and values, the better they can adapt their campaign to be more successful (Matusitz, 2022). A practical example is using something as seemingly simple as understanding what the organization's target audience is searching for and then using that to drive content (Bradbury, 2023). Broadly speaking, formative research also helps practitioners better identify how to develop relationships with their publics and stakeholders and "to determine how the organization can align its behavior with the needs of its publics" (Grunig, 2008, p. 98). Qualitative research is often more helpful than quantitative at the formative stage and can include environmental scanning, organizational listening, focus groups and so on (Grunig, 2008). This stage is also important for determining what is a reasonable goal; as AMEC (n.d.-f) highlights, it may be difficult to tie PR efforts to sales but it is "PR's job to build mental availability (or brand salience). In other words, to make sure the target audience thinks of your brand first at the time of purchase" (Drive sales section, para. 2). Because of this, setting an objective to reach the target audience with the key messages and then running surveys to understand unaided brand awareness and what people think about the brand might better set the PR team up for success than saying PR will increase sales by X% (AMEC, n.d.-f).

Mid-campaign evaluation allows practitioners to identify whether the campaign is on track to reach its objectives and make changes as necessary (European Committee of the Regions, 2016). What types of M&E happen at this stage are largely dependent on the objectives and goals; as one example:

> if based on the understanding of the target audience levels of information, the communications objective of the program is to generate awareness of a brand or product, then the message most essential to communicate through third parties or intermediaries is the name of the brand or product. Content is analyzed to determine if that message is present in the third party story, absent in the story, or appears in an erroneous form. (Michaelson & Stacks, 2011, p. 18).

Process evaluation should include outputs and outtakes – those short-term insights to identify whether "messages are being sent, placed, or received" (Grunig, 2008, p. 99). This can include how many press releases are being sent out, media pickup and social monitoring to determine how messages are being interpreted (Grunig, 2008). Metrics should be combined such as volume plus quality so rather than just looking at how many media stories were published, PR practitioners should also look at the sentiment, message pull-through, spokespeople, etc. included in those stories for additional insights (Bradbury, 2023).

Grunig (2008) highlights that it is not enough to measure process indicators that have always been done by an organization such as issuing press releases, but to measure those that were identified through formative research as tactics that would have demonstrable and meaningful outcomes both short- and long-term for the specified audiences. He writes:

> At the program level, we must demonstrate, first, that the processes have had short-term effects on the cognitions, attitudes, and behaviors of both publics and management—what people think, feel, and do. In addition, we need to determine whether those short-term effects continue over a longer period—that is, whether they have any effect on the long-term cognitive, attitudinal, and behavioral relationships among organizations and publics. (Grunig, 2008, p. 99)

Summative evaluation post-campaign helps identify whether objectives were met and what factors led to the campaign's successes and/or failures (Buhmann et al., 2018). This type of evaluation requires more research-driven methods such as surveys, focus groups, control/comparison groups, customer journey mapping, etc. (Grunig, 2008; Macnamara, 2023). It also, critically, requires an initial SMART objective; as Macnamara has spoken about, waiting until the end of a campaign to evaluate its success is difficult because "you're out of data, you're out of time, and very often you don't have the right baseline data to compare to" (European Committee of the Regions, 2016, 3:40).

Relationships, one of the key areas PR can impact, are a longer-term metric that should be measured via survey related to six key components: control mutuality, trust, satisfaction, commitment, exchange relationship and communal relationships (Hon & Grunig, 1999). The last two components gauge perception of the organization's commitment to the relationship even when it does not need something from its stakeholders/audiences/publics; an exchange relationship is based entirely on expecting something in return whereas a communal relationship is one where "both parties provide benefits to the other because they are concerned for the welfare of the other – even when they get nothing in return" (Hon & Grunig, 1999, p. 21). Hon & Grunig (1999) created a comprehensive questionnaire that can be used to measure relationships that includes questions in the six identified areas.

The importance of data

Data is critical to enacting best practices in M&E; it can help identify key journalists and influencers, understand audiences and tie PR efforts to business impact (O'Neil et al., 2022; Weiner, 2021). Weiner (2022) suggested that a good M&E program can include four types of analytics: descriptive (what happened), diagnostic (why did it happen), predictive (what will happen next) and prescriptive (what do we do about it). This more sophisticated approach to M&E can provide insights that drive action in significant ways, for example being able to identify when online chatter is going to turn into a crisis for the organization and/or how to respond (Weiner, 2022). From a professional development standpoint, a PR practitioner who uses data to drive action may be more likely to get promoted; as one CMO suggested in a recent study: "Based on what I've seen in the communications industry and space, numbers and analytics are almost always the surest path to leadership" (O'Neil et al., 2022, p. 155). The use of data is also increasingly expected: a 2023 future of corporate communications study highlighted that executives now expect *consumer-grade data and analysis* to make decisions based on real insights rather than gut instinct or intuition (Edelman, 2023). It also recommended that:

> communications leaders would be well served by asserting ownership over the unmet need to define communications' measurable value and demonstrate progress against benchmarks and targets. Doing so will put you on equal footing with other functional leaders more accustomed to measuring their progress and performance against stringent enterprise outcomes. (Edelman, 2023, p. 9)

Weiner (2021) put it simply: "In a world driven by data-informed decision-making, the absence of PR data means PR's value remains entirely subjective, an undesirable position which puts our professional standing at risk" (p. 2). Paine (2007) likewise wrote:

> Data at your fingertips saves time in deciding what media outlets to target, and it saves resources by showing clearly which weaknesses need to be addressed immediately. It helps you better direct the resources you have, ensuring that their efforts are having maximum impact. Data at your disposal means less time debating the merits of one tactic over another. Gut feelings can always be second guessed, but data is much harder to argue with. (p. 12)

Not all data is equal though, and some experts have highlighted that where you get your data can change its relevancy. For example, a small subset of individuals are on Twitter; the platform's users are not representative of the broader population (IPR Measurement Commission, 2022). Likewise, one expert shared an example of doing a survey where data showed that, based on the responses, John McCain would win a recent presidential election. The critical note alongside the results was that the survey was conducted with AOL users who were more likely to be Caucasian men over the age of 50; just because it was real data did not make it valid or reliable (IPR Measurement Commission, 2022). PR practitioners not only have to know how to access data but how to assess its validity and tell the story about the data as well (IPR Measurement Commission, 2022).

Multiple barriers for PR practitioners using data effectively have been noted, including lack of data literacy; many practitioners are unfamiliar with using data and analytics in their regular work and may not know how to parse out what is important in what can seem like an overwhelming amount of data (O'Neil et al., 2022). In fact, a study in 2021 found that out of relevant communications competencies, data was the weakest; almost 30% of PR professionals were under skilled and just over 10% were defined as *critically* under skilled (Meng et al., 2021). Getting access can also be difficult; data is not always centralized in a communications department so may require trying to find relevant data and/or liaising with others in the organization. There can also be a challenge in staying current with new and changing technology. Finally, there is also a feeling that many individuals who work in PR made a conscious effort to work with words, not numbers (potentially because of a *fear* of math) (Arenstein, 2021; O'Neil et al., 2022); a CMO in recent research suggested, "businesses run on numbers, so if you are unwilling to grapple with the numbers, it's highly unlikely that you will advance in your career at the same rate as someone who is" (O'Neil et al., 2022, p. 156). In response to a survey showing some of the barriers to M&E programs, M&E expert Paine said, "My question to this group is, 'What's the cost of ignorance, risk and wasting more of your budget on things that don't work' when you choose not to measure?" (Arenstein, 2021).

Case studies

Examples of successful and meaningful M&E programs exist in the form of case studies highlighted through professional communications associations and research bodies, including AMEC. AMEC shared one about the United Kingdom's Department of Health and Social Care (DHSC) who had an initiative to train a teacher at every secondary school in mental health first aid (AMEC, n.d.-d). Having identified objectives of generating interest in the training (measured by web visits) and increasing signups for the training (measured via online registrations), the DHSC placed its efforts on trade and audience-specific media (i.e., that secondary school teachers read) using both national and regional tactics. They were able to see a correlation between their efforts and visits to the website, as well as signups for the training (6.3x increase over three days following the initial announcement) (AMEC, n.d.-d).

Another example is the company Philips which set objectives of raising awareness, recommendations and purchase intent of a steam iron among women in the UK (AMEC, n.d.-e). After running an initial campaign, the company identified success in those areas through a survey. Unexpected learnings from the survey led to a secondary campaign; the target audience showed high brand awareness but lower in-depth understanding of the iron's technology, so the company hosted *ironing parties* where women could try the iron which led to an increase in recommendations and online reviews for the product and Philips climbing to the top place in UK garment care (AMEC, n.d.-e).

Another case study was written up by the Bank of Canada highlighting the organization's desire to better measure and evaluate its work. The organization's communications team created a logic model to show how activities would lead to outputs (posts, articles, publications, etc.) which would then help drive immediate outcomes such as reach, education and engagement, intermediate outcomes such as awareness, knowledge and attitudes and the ultimate desired outcome of increased trust in the organization (Bank of Canada, 2021). It is important to note that, in the corresponding framework, the intermediate and ultimate outcomes were all measured through surveys and/or focus groups. Analysis of the data helped the bank modify its strategy to better align with audience preferences: for example, when data showed a preference for shorter, simpler content, the bank added a summary to all its speeches. Additionally, the bank used learnings during the pandemic to inform how it communicated financial changes, creating a web page to explain the actions it was taking and participating in media interviews and publishing explainers to help Canadians better understand complex economic topics (Bank of Canada, 2021).

M&E is critical for PR; aligned with the excellence theory, effective M&E programs can "improve communication and business performance for organizations" (Cacciatore & Meng, 2022, p. 127) and help advance PR as an industry (Cacciatore & Meng, 2022; Grunig, 2013).

Research problem

This research explored how and to what extent PR practitioners can better measure the *impact* of their efforts. It sought to understand current M&E practices employed by PR practitioners, the barriers and gaps they experience in effectively measuring and evaluating their efforts and recommendations for a better M&E practice from communications experts and thought leaders. These findings supported the creation of a practical guide to establish M&E programs in organizations not currently engaging in this practice who have limited budgets, resources and/or capacity for M&E.

Research questions

RQ1: How and to what extent do PR practitioners know they are connecting with their stakeholders, audiences and publics and what evidence do they have that shows they are doing it?

This question first examined how and to what extent PR practitioners understand their stakeholders, audiences and publics in a way that helps target their strategy, including tactics and messaging (i.e., demographics, media consumption habits, etc.). Second, this question probed whether PR practitioners engage in dialogue with and/or listen in some way to their stakeholders, audiences and publics. Finally, this question examined whether PR practitioners have a feedback loop to identify stakeholder/audience/public response to a communications campaign.

RQ2: What role do measurement and evaluation play in the formation of PR practitioners' efforts?

Leading M&E experts have suggested a critical step in setting PR practitioners up for success is integrating M&E into the creation of a communications strategy. This research question aimed to understand to what extent practitioners use environmental scanning in their planning and whether they incorporate SMART objectives into their communications campaigns. Further, because not all objectives are created equal, this question aimed to understand to what extent PR practitioners are aware of the difference between and incorporate outputs, outtakes, outcomes and impact to measure the success of their work.

RQ3: How and to what extent do PR practitioners measure and evaluate their work?

This question aimed to understand PR practitioners' practice of evaluating their efforts before, during and after a communications campaign, including whether they measure avoidance. Further, it examined whether PR practitioners believe their efforts to be effective based on measurable objectives and why.

RQ4: How can PR practitioners, who are not currently engaging in M&E, begin measuring their efforts?

The previous three questions focused on understanding current communications practices; this question was forward looking and answered through interviews with leading M&E and communications experts as well as asking Canadian PR practitioners what types of resources would support them in implementing better M&E programs. It aimed to understand the best steps for PR practitioners not currently measuring or evaluating to begin an M&E practice. While this question incorporated suggestions for supportive M&E communication technology tools that can be used (i.e., Cision, Meltwater, etc.) and other paid resources, the researcher chose to place a specific focus on low- or no-cost methods to measure and evaluate communications efforts for organizations with limited communications resources, capacity and/or budgets.

Methodology

Data collection and analysis

This research project used three types of evidence in data triangulation to answer the research problem and research questions (Yin, 2018): (1) an expansive literature review that included examples of M&E best practices, (2) a national online survey that gathered insights from Canadian PR practitioners about current M&E practices, barriers and gaps and (3) one-on-one, long-form interviews with leading communications thought leaders and C-suite communicators about M&E challenges and opportunities.

This study was reviewed and approved by the McMaster University Research Ethics Board (see Appendix B for the clearance certificate). Reviewers provided feedback on all aspects of data collection and storage including survey and interview questions as well as language in letters of information/consent and recruitment posts/emails.

Survey

Based on insights and information gathered in the literature review, the researcher created an online survey (hosted on LimeSurvey) about communications measurement and evaluation. The survey was pre-tested with ten PR practitioners to ensure clarity and comprehension; slight modifications to questions and flow were made based on feedback gathered during the pre-test.

The final survey had 31 questions, though seven questions were only visible if a respondent answered a specific way to a previous question (see Appendix C for the survey letter of information and Appendix D for survey questions). The survey focused on five key areas: demographics, audience, objectives, measurement and evaluation, and support. All survey responses were anonymous; no one was asked to input their name, organization, email address or any other identifying information. Additionally, all questions had optional responses of *prefer not to answer* and *don't know* to ensure minimal discomfort with providing information and encourage participants to continue to the end of the survey rather than exit partway through.

Survey respondents were recruited via convenience, purposive and snowball sampling (Stacks, 2017); the researcher shared the survey link through their personal network, including on social media (Twitter/X, Instagram and LinkedIn) and via direct email and message to contacts with a request to complete and share through their own networks as appropriate. Additionally, McMaster University's Master of Communications Management (MCM) program shared a link to the survey through its Twitter/X, Instagram and LinkedIn channels which increased the reach of potential respondents. All Canadian PR practitioners were eligible to participate in the survey.

The survey was live for almost three weeks (September 11-29, 2023), in which time a total of 104 complete responses were captured. As shown in Table 1, respondents held junior to senior positions from advisor and coordinator to vice president and chief communications officer. The largest group of respondents was managers (n=29).

Table 1

Survey question: What is your title?

Response (*N*=104)	n	%
Manager	29	27.88%
Director	19	18.27%
Consultant	13	12.50%
Senior advisor	13	12.50%
Advisor	6	5.77%
Vice president	6	5.77%
Other	5	4.81%
Officer	4	9.85%
Specialist	4	3.85%
Coordinator	3	2.88%
Chief communications officer	2	1.92%

Similarly, as shown in Table 2, respondents had a range of years of experience working in communications from less than two years up to 16+.

Table 2

Survey question: How many years have you worked in communications/public relations?

Response (*N*=104)	n	%
0-2	2	1.92%
3-5	15	14.42%
6-10	27	25.96%
11-15	31	29.81%
16+	29	27.88%

As shown in Table 3, almost half of survey respondents (46%) worked in the public sector, a quarter (26%) in the private sector, a fifth (19%) in not-for-profit and 8% in a combination of private/public/not-for-profit.

Table 3

Survey question: Do you work in the private sector, the public sector or the not-for-profit sector?

Response (*N*=104)	n	%
Private	27	25.96%
Public	48	46.15%
Not-for-profit	20	19.23%
Combination	8	7.69%
Prefer not to answer	1	0.96%

PR practitioners from various industries participated in the survey, with the most coming from healthcare (28%) and government (16%) (see Table 4).

Table 4

Survey question: What sector [industry] do you work in?

Response (*N*=104)	n	%
Healthcare	29	27.88%
Government	17	16.35%
Other	14	13.46%
Education	9	8.65%
Finance/banking	8	7.69%
Agency	6	5.77%
Technology	6	5.77%
Energy/minerals	3	2.88%
Insurance	2	1.92%
Manufacturing	2	1.92%
Religion	2	1.92%
Retail	2	1.92%
Transportation	2	1.92%

Prefer not to answer	2	1.92%

Respondents were asked about the size of their immediate communications team was as well as how many people in total worked in communications across their organization. As shown in Table 5, the majority (63%) had immediate teams of between 2-10 communicators. There was a more even split when asked how many people worked in communications across the entire organization.

Table 5

Survey question: How big is your immediate team/approximately how many people in total work in communications across your organization?

Response (*N*=104)	Immediate team		Entire organization	
	n	%	n	%
1 (just you) (AO01)	13	12.50%	9	8.65%
2-10 (AO02)	66	63.46%	28	26.92%
11-20 (AO03)	18	17.31%	22	21.15%
21-50 (AO04)	5	4.81%	23	22.12%
51+ (AO05)	2	1.92%	22	21.15%

Finally, respondents were asked about their team's annual M&E budget. As shown in Table 6, the majority either said they did not have a dedicated M&E budget (37%) or did not know (29%).

Table 6

Survey question: What is your communication team's annual measurement and evaluation budget?

Response (*N*=104)	n	%
We don't have a measurement and evaluation budget	38	36.54%
Don't know	30	28.85%
$1-999	3	2.88%
$1,000-2,499	2	1.92%
$5,000-9,999	3	2.88%
$10,000-24,999	7	6.73%
$25,000-49,999	2	1.92%
$50,000-99,999	4	3.85%
$100,000+	5	4.81%
Prefer not to answer	4	3.85%

Survey responses were analyzed both in aggregate (total counts and percentages of responses to each question) as well as coded and analyzed through data correlation in Excel. Correlations were used to indicate relationships between certain variables; in many cases, correlations were weak (below ±.30) or moderate (between ±.31 and ±.70) but were included where they indicated a stronger relationship than that seen between other variables (Stacks, 2017).

Qualitative responses (to open-ended questions) were analyzed thematically to identify patterns, trends, key learnings and connections to the research problem and questions.

Interviews

Long-form one-on-one interviews were planned with two distinct groups: communications/PR experts and C-suite communicators. Experts were defined as individuals who had published research/thought leadership related to M&E and/or belonged to groups that focused on M&E (such as the Institute for Public Relations' Measurement Commission (n.d.)). C-suite communicators were individuals who sat at an executive level within their organization, be it corporate or agency.

To access individuals for the one-on-one interviews, the researcher used a combination of purposive and snowball sampling (Stacks, 2017). The researcher started with a list of C-suite communicators and experts and then reached out through their own professional network (asking those within it with existing connections to the individuals to reach out for their participation) and via direct communication to individuals where contact information was publicly available. The researcher also asked all interviewees if they had recommendations for others the researcher should connect with; most provided names and some reached out to additional individuals on the researcher's behalf.

When contacted with an interview request, four C-suite communicators recommended the researcher speak with a different member of their team. In analysis, those four individuals were included in their own *non-C-suite communicators* category as they were not at an executive level but rather were most often in charge of data/listening centres.

In total, the researcher spoke to 31 individuals from August 14 to October 2, 2023: 14 experts, 13 C-suite communicators and four non-C-suite communicators (see Table 7 for expert locations and Table 8 for C-suite and non-C-suite communicator locations and sectors). All 31 interviews were conducted via online platforms (Zoom, or in one case Teams where an individual was more comfortable with that platform). Interviews lasted between 20-60 minutes. Experts were asked ten questions while C-suite and non-C-suite communicators were asked 16 questions (see Appendix E for the interview letter of information/consent; see Appendix F for interview questions for both experts and C-suite communicators). Audio was recorded using a recording device.

Table 7

Interviewed communications experts' locations

Pseudonym	Location
Communications expert #1	United States
Communications expert #2	United States
Communications expert #3	United States
Communications expert #4	United States
Communications expert #5	United States
Communications expert #6	United States
Communications expert #7	United States
Communications expert #8	United States
Communications expert #9	United States
Communications expert #10	United States
Communications expert #11	United States
Communications expert #12	United States
Communications expert #13	United States
Communications expert #14	Europe

Table 8

Interviewed C-suite and non-C-suite communicators' locations and sectors

Pseudonym	Location	Sector
C-suite communicator #1	United States	Consulting
C-suite communicator #2	Europe	Consulting
C-suite communicator #3	Canada	Energy
C-suite communicator #4	Europe	Consulting
C-suite communicator #5	Canada	Crisis management
C-suite communicator #6	Canada	Market research
C-suite communicator #7	United States	Automotive
C-suite communicator #8	Canada	Healthcare
C-suite communicator #9	Canada	Education
C-suite communicator #10	Canada	Healthcare
C-suite communicator #11	Canada	Healthcare
C-suite communicator #12	United States	Automotive
C-suite communicator #13	United States	Restaurants
Non-C-suite communicator #1	United States	Insurance
Non-C-suite communicator #2	United States	Airline
Non-C-suite communicator #3	United States	Technology
Non-C-suite communicator #4	United States	Consulting

There was an almost even split of male and female interviewees: 16 out of the 31 were women. Women accounted for 50% of experts interviewed, 62% of C-suite communicators and 25% of non-C-suite communicators.

All interviewees were asked about audience, objectives, measurement and evaluation, if they had additional information they wanted to share and if they had recommendations for additional interviewees. C-suite and non-C-suite communicators were additionally asked demographic questions.

Interviewed C-suite communicators had worked in communications for an average of 24 years (range 16-35) and held positions such as senior vice president, vice president, global head, consultancy lead, principal and managing director. Those who could share their annual M&E budget shared different amounts ranging from $85,000 to $4 million. Nine C-suite communicators said either each client had their own budget or they had no dedicated M&E budget.

Interviewed non-C-suite communicators had an average of 14 years working in communications (range: 8-25) and held positions including lead, manager, senior manager and director. Two of the four shared their M&E budgets: $67,000 and $250,000.

After each discussion, the researcher transcribed the interview using a pseudonym for each interviewee (i.e., Communications expert #1, C-suite communicator #4) to anonymize responses. Once all interviews were complete and transcribed, the researcher inputted answers to each question in an Excel spreadsheet. The researcher used a combination strategy of relying on theoretical propositions and working the data from the ground up, reading through interview responses and identifying insights, relationships and themes related to information collected in the literature review (Yin, 2018). This strategy required multiple read-throughs of all answers to confirm themes and identify how many/which interviewees said something related to each theme. The researcher used a coding framework to ensure consistency in identifying and applying themes (Yin, 2018). Themes were then analyzed against the research problem and questions and literature review to identify key learnings and trends as part of an explanation building analytic technique (Yin, 2018). This approach was "partly deductive (based on the statements or propositions at the outset…) and partly inductive (based on the data…)" (Yin, 2018, p.

181). Additionally, the researcher noted direct quotes or verbatims to “illustrate some key strategic finding[s] in the research” (Stacks, 2017, p. 201).

Intercoder reliability analysis was not utilized for this study for several reasons. First, the researcher faced practical constraints including budget and availability of additional coders. Additionally, given the nature of how data was collected, this study’s results were not meant to be generalizable to the broader category of PR practitioners but rather highlight insights at a moment in time: “Qualitative researchers’ role is not to reveal universal objective facts but to apply their theoretical expertise to interpret and communicate the diversity of perspectives on a given topic” (O’Connor and Joffe, 2020, p. 4). Further, the researcher used in-depth understanding gathered through the comprehensive literature review as a lens to better identify connections between collected data and theory, relying on a depth of knowledge based on months immersed in the topic that would not be present for other readers/coders (O’Connor and Joffe, 2020).

To better increase the validity and reliability of the study’s findings, the researcher used data triangulation and a coding framework to ensure consistency when reviewing qualitative data (Yin, 2018).

Results

The following sections highlights results gathered through the survey of Canadian PR practitioners and interviews with communications experts/thought leaders, C-suite and non-C-suite communicators.

While there are nuances associated with the terms publics, audiences and stakeholders, the researcher used the theoretical assumption that many PR practitioners use the terms interchangeably and chose to use only the term *audiences* in data collection to avoid any confusion.

RQ1: How and to what extent do PR practitioners know they are connecting with their stakeholders, audiences and publics and what evidence do they have that show they are doing it?

Understanding audiences

This question first examined how and to what extent PR practitioners understand their audiences in a way that helps target their messaging.

When asked about the type of information gathered about target audiences to inform PR efforts, 18% of survey respondents said they do not gather any information. 68% said they gather demographic information, 48% behavioural, 48% media consumption habits and 25% psychographic (see Table 9).

Table 9

Survey question: What type of information do you gather about your target audiences to inform your communications efforts? Select all that apply.

Response (*N*=104)	n	%
Demographic (i.e., age, location, gender, profession, etc.)	71	68.27%
Behavioural (i.e., interactions with your organization, spending habits, etc.)	50	48.08%
Media consumption habits (i.e., where they get their information)	50	48.08%
Psychographic (i.e., values, desires, goals, lifestyle, political views, etc.)	26	25.00%
We don’t gather any information about our target audiences	19	18.27%
Don’t know	2	1.92%

Of those respondents who gather some type of information (n=83; see Table 10), 63% said they do so through primary research, 59% through assumptions, 55% through secondary research and 47% through some type of media insights software. Additional methods of gathering intel (“other”) included from website analytics, email metrics and subscriber data from owned platforms.

Table 10

Survey question: Where do you get information about your target audiences? Select all that apply.

Response (*N*=83)	n	%
Primary research (i.e., own study about them, focus groups, etc.)	52	62.65%
Assumptions (i.e., either your own or from your organization)	49	59.04%
Secondary research (i.e., Google, media, public opinion polls, etc.)	46	55.42%
Media insights software/tools (i.e., Cision, Meltwater, etc.)	39	46.99%
Other	6	7.23%
We don't gather any information about our target audiences	1	1.20%
Don’t know	1	1.20%

When creating a communications plan, respondents were most likely to choose tactics/channels/approach based on where their audience was most likely to be reached (70%), what they used in previous campaigns (65%), budget (63%), available time (52%), what’s available (50%) and client preferences (46%).

C-suite (n=13) and non-C-suite communicators (n=4) were asked in interviews about their current practice for understanding their audiences. As shown in Table 11, all but one in each group said their primary method was talking and/or listening to audiences directly; C-suite communicators shared a variety of methods to do so including surveys, focus groups, one on one interviews, polling, public consultation/engagement, market research and social listening/monitoring. Non-C-suite communicators said similar methods including at events, through surveys and looking at their audience's behaviour online through tools. The next most used method for C-suite communicators (69%) was through secondary research/existing data in the organization such as from HR, employee engagement surveys, applications and self-identification surveys. A third method was to segment audiences.

Table 11

Interview question (C-suite and non-C-suite communicators): What is your current practice to understand your audiences including their demographics, psychographics, media consumption, etc. as well as their needs, desires and other relevant information?

Theme	C-suite (N=13)		Non-C-suite (N=4)	
	n	%	n	%
Talk and/or listen to them directly	12	92.31%	3	75.00%
Secondary research/data that already exists	8	61.54%	1	25.00%
Segment audiences	3	23.08%	1	25.00%

Communications experts were asked for their top tips for finding the needs, desires and other relevant information for PR efforts. As shown in Table 12, their top two were directly aligned with C-suite communicators' responses: talking and/or listening to audiences and using secondary research/existing data in the organization. A third theme was paying for research and/or using tools to get good insights, which included suggestions to commission formal research and use various paid and free tools such as Google Trends, Global Web Index, ChatGPT, demographics databases and social media intelligence tools. Almost a third of experts (29%) also highlighted the importance of challenging assumptions about audiences through intentionally looking for contrarian views, being skeptical of whether data is correct (i.e., one highlighted that a lot of research is skewed towards white collar workers) and eschewing broad categories to find more valuable specific information.

Table 12

Interview question (communications experts): What is your top tip for finding the needs, desires and other information about audiences relevant to effective public relations?

Theme (N=14)	n	%
Talk and/or listen to them directly	11	78.57%
Use secondary research/existing data in organization	10	71.43%
Pay for research/use tools to get good insights	8	57.14%
Challenge your assumptions	4	28.57%
Segment audiences	2	14.29%

Engaging in dialogue and/or listening

This research question probed whether PR practitioners are engaging in dialogue with and/or listening in some way to their audiences and, if so, how that impacts their communications efforts. This question also examined whether practitioners have a feedback loop to identify audience response to a communications campaign and how that impacts their future efforts.

Just over half (59%) of survey respondents said they have processes for regularly listening to their target audiences; 38% said they do not and 4% did not know.

A correlation analysis was done in Excel to determine if there was a relationship between PR practitioners listening to their audiences and the sector they work in (public, private, not for profit). As shown in Table 13, those who work in the private sector were more likely to say they listened to their audiences and those in not for profit to say they did not.

Table 13

Correlation between answers to the questions Do you have processes established to regularly listen to your target audiences? *and* Do you work in the private sector, the public sector or the not-for-profit sector?

	Private	Public	Not for profit	Combination
Yes	0.19	-0.05	-0.14	0.02
No	-0.23	0.04	0.18	0.00
Don’t know	0.11	0.02	-0.10	-0.06

Survey respondents who do regularly listen to their audiences (n=61; see Table 14) do so through direct feedback (84%), social listening (72%), surveys (67%) and direct outreach (6%).

Table 14

Survey question: How do you listen to your target audiences? Select all that apply.

Response (*N*=61)	n	%
Direct feedback (i.e., responses to newsletters, complaints, etc.)	51	83.61%
Social listening (i.e., via social media)	44	72.13%
Surveys	41	67.21%
Direct outreach (i.e., phone calls, emails, etc.)	40	65.57%
Other	5	8.20%

C-suite communicators were asked how they engage in dialogue and/or listen to their audiences and their answers largely mimic survey respondents': more than two thirds (71%) said they talk and/or listen through discussions/research such as surveys, meetings, direct feedback and 57% said they listen through social media/media/website listening and analytics.

When asked how they confirm their efforts reached the intended audience, survey respondents were mixed: as shown in Table 15, 13% said they have no process for confirming target audiences were reached while 40% simply assume. Others use social listening (65%), surveys (34%), web/social analytics (14%), whether the call to action (i.e., event registration/attendance, sales, etc.) had been followed (8%), media coverage (5%) and other direct feedback (4%).

Table 15

Survey question: When you run a communications campaign, how do you confirm whether your efforts reached your target audience? Select all that apply.

Response (*N*=104)	n	%
Social listening	68	65.38%
Assumptions	42	40.38%
Survey	35	33.65%
Web/social analytics	15	14.42%
We don't confirm whether target audiences were reached	14	13.46%
Call to action	9	8.65%
Media coverage	5	4.81%
Other direct feedback	4	3.85%

RQ2: What role do measurement and evaluation play in the formation of PR practitioners' efforts?

Leading M&E experts have suggested a critical step in setting PR practitioners up for success is integrating M&E into the creation of a communications strategy. This research question aimed to understand to what extent PR practitioners use environmental scanning in their planning and how they incorporate measurable, SMART objectives into their communications campaigns.

Environmental scanning

When asked how frequently they conduct environmental scanning, a third of survey respondents (35%) said daily. From there, answers varied greatly from weekly (10%) to less frequently than annually (9%), monthly, quarterly and annually (7% each) and never (6%). 12% of respondents did not know, indicating it is not in their current practice. Those who answered “other” (7%) suggested it happened ad hoc or they were not aware of the meaning of the question.

In interviews, C-suite and non-C-suite communicators were asked about their current approach to environmental scanning. As shown in Table 16, almost half (46%) of C-suite communicators did not have a regular practice of looking at trends outside of their own organization and/or did not understand the question (i.e., thought it was referring to gathering information about the natural environment). Almost half (46%) looked externally for campaign specific research, for example to ensure they understood potential issues that could arise from a specific communications campaign. 38% used social analytics/listening/media monitoring regularly for opportunities for brand moments and to stay on top of relevant issues to their organization. 38% looked at industry news and analysis which included regulatory/political/cultural updates that may impact the business, global trends and competitor news. Non-C-suite communicators had a practice of staying on top of industry news and analysis (75%), using social analytics/listening/media monitoring to see updates in real time (50%) and doing campaign specific research (25%).

Table 16

Interview question (C-suite and non-C-suite communicators): What is your current approach to environmental scanning?

	C-suite (N=13)	Non-C-suite (N=4)

Theme	n	%	n	%
Issue/campaign specific research	6	46.15%	1	25.00%
Don't look at trends outside of own org/did not understand the question	6	46.15%	0	00.00%
Industry news/analysis	5	38.46%	3	75.00%
Social analytics/listening/media monitoring	5	38.46%	2	50.00%

Communications experts were asked for their recommendations for effective environmental scanning. Their suggestions included using academic research and free or paid tools (i.e., SparkToro, Answer The Public, TalkWalker) (57%), social listening/media monitoring (57%), being specific about the issues being investigated externally (i.e., those that are most relevant to the organization rather than trying to *boil the ocean*) (43%), building in audience specificity/looking at influencers in the space (43%), approaching it from a place of curiosity and going beyond normal methods of gathering intel (i.e., intentionally looking to avoid confirmation bias) (29%) and finally talking to people within the organization to ask what they are hearing/seeing/think is important to focus on (21%).

Measurable objectives

The second part of this research question was to understand to what extent PR practitioners set measurable objectives and are aware of the difference between and incorporate outputs, outtakes, outcomes and impact to measure the success of their work. The survey asked whether there was an expectation in PR practitioners' organizations for measurable communications objectives. As shown in Table 17, 63% of respondents said yes, 31% said no, 4% said they did not know and 3% chose not to answer the question.

Table 17

Survey question: Is there an expectation in your organization for measurable communications objectives?

Response (*N*=104)	n	%
Yes	65	62.50%
No	32	30.77%
Don't know	4	3.85%
Prefer not to answer	3	2.88%

A correlation was run to determine if there was a relationship between whether there is an organizational expectation for measurable communications objectives and the sector survey respondents work in (public, private, not for profit). As shown in Table 18, those who work in the private sector were most likely to say there was an expectation for measurable objectives and those in the public sector to say there was not.

Table 18

Correlation between answers to the questions Is there an expectation in your organization for measurable communications objectives? *and* Do you work in the private sector, the public sector or the not-for-profit sector?

	Private	Public	Not for profit	Combination
Yes	0.28	-0.24	-0.08	0.07
No	-0.35	0.26	0.10	-0.04
Don't know	0.11	-0.08	0.03	-0.06

When asked how often objectives in recent communications plans were measurable, the largest percentage of survey respondents (39%) said sometimes, 27% said most of the time, 12% said always, 11% said never and about half the time each (see Table 19).

Table 19

Survey question: Thinking about recent communications plans, how often were your objectives measurable (i.e., tied to specific numbers – increase social impressions from X to X or by X%, etc.)?

Response (*N*=104)	n	%
Never	11	10.58%
Sometimes	41	39.42%
About half the time	11	10.58%
Most of the time	28	26.92%
Always	12	11.54%
Don't know	1	0.96%

A correlation was run to determine if there was a relationship between how often survey respondents' objectives were measurable and the sector survey respondents work in (public, private, not for profit; see Table 20). Those who work in the private sector were more likely to say their objectives were measurable most of the time or always. Respondents who work in the public sector were most likely to say their objectives were never measurable.

Table 20

Correlation between answers to the questions Thinking about recent communications plans, how often were your objectives measurable? *and* Do you work in the private sector, the public sector or the not-for-profit sector?

	Private	Public	Not for profit	Combination
Never	-0.20	0.31	-0.09	-0.10
Sometimes	-0.16	0.08	-0.04	0.14
About half the time	-0.06	0.00	0.15	-0.10
Most of the time	0.18	-0.26	0.14	-0.01
Always	0.27	-0.09	-0.18	0.01
Don't know	-0.06	0.11	-0.05	-0.03

Another correlation was run to determine if there was a relationship between organizations with an expectation for measurable objective and how often survey respondents had measurable objectives in recent campaigns. As shown in Table 21, those who said there was an expectation were more likely to say they had measurable objectives about half of the time, most of the time or always; those who said there was no expectation were most likely to say they never or sometimes had measurable objectives.

Table 21

Correlation between answers to the questions Is there an expectation in your organization for measurable communications objectives? *and* Thinking about recent communications plans, how often were your objectives measurable?

	Never	Sometimes	About half the time	Most of the time	Always
Yes	-0.31	-0.27	0.14	0.29	0.16
No	0.38	0.19	-0.16	-0.26	-0.11
Don't know	-0.07	0.15	0.09	-0.12	-0.07

Survey participants were asked to share an objective from a recent communications plan. Those submitted (n=56) were coded based on whether they contained all elements of a SMART objective – only 12% did; most had no measurable element while some had a measurable element but no timeframe. The objectives were also coded based on whether they were outputs, outtakes, outcomes or impacts. Almost half (46%) were outtakes, mostly focused on generating awareness; 30% were outputs (media stories, increasing impressions, etc.); only a fifth (21%) were tied to a specific outcome (increase satisfaction scores, registrations for programs); and just two respondents submitted objectives focused on business impact (customer retention, program recruitment).

When asked where objectives come from when creating communications plans, survey respondents shared that they are most often tied to business objectives (92%) then based on executive expectations (61%), on research (34%) and on gut instincts about the goals of the campaign (31%).

Finally, PR practitioners were asked to share what objectives focused on in recent communications plans. As shown in Table 22, three of the top four responses (awareness (86%), social media engagement (51%) and website traffic (46%)) were outtakes – what audiences did with the communication. The fourth (media stories/reach (46%)) was an output – what the communications team did. The fifth metric was an outcome (attitude/behaviour change (44%)). Impact metrics were closer to the bottom; 13% said their objectives focused on return on investment, 10% on donations and just 6% on sales/pipeline/revenue.

Table 22

Survey question: Thinking about recent communications plans, what were your objectives focused on? Select all that apply.

Response (*N*=104)	n	%
Output		
Media stories/reach	48	46.15%
Event attendance	35	33.65%
Social media impressions	34	32.69%
Media sentiment	28	26.92%
Newsletter opens/clicks	27	25.96%
Message pull-through	23	22.12%
Share of voice	16	15.38%
Pitches sent/replied to	9	8.65%
Advertising value equivalency (AVE)	8	7.69%
Outtake		
Awareness	89	85.58%
Social media engagement	53	50.96%
Website traffic	48	46.15%
Outcome		
Attitude/behaviour change	46	44.23%
Reputation change	26	25.00%
Net promoter score (NPS)	7	6.73%
Impact		
Return on investment (ROI)	14	13.46%

Donations	10	9.62%
Sales/pipeline/revenue	6	5.77%

C-suite and non-C-suite communicators were asked about their approach to setting SMART objectives. As shown in Table 23, almost two thirds (69%) of C-suite communicators stressed the importance of starting with business goals to ensure communications goals would have an impact (i.e., things like donations, enrollment, reputation, etc.). They also suggested objectives should focus on outcomes (31%) rather than outputs or outtakes though 15% said outtakes could be useful as proxies to show progress towards larger goals. Two thirds (75%) of non-C-suite communicators talked about how it could be challenging to connect communications actions to business goals and suggested that without using outtakes, it would be impossible to understand what is resonating in real time with audiences on different channels.

Table 23

Interview question (C-suite and non-C-suite communicators): What is your current approach to setting SMART objectives that can be measured?

Theme	C-suite (N=13)		Non-C-suite (N=4)	
	n	%	n	%
Start with business goals	9	69.23%	1	25.00%
Focus on outcomes	4	30.77%	1	25.00%
Have a baseline	3	23.08%	2	50.00%
Outtakes can be useful as proxies	2	15.38%	3	75.00%

Communications experts were asked for advice for setting measurable objectives. The top four answers were tie them to business goals (79%), set objectives that *can* be measured (i.e., they must be capable of being counted, cannot include vague terms such as buzz, hype or spin) (50%), there must be a baseline (43%) and make them audience specific (36%).

RQ3: How and to what extent do PR practitioners measure and evaluate their work?

This question aimed to understand PR practitioners' practice of incorporating M&E before, during and after their communications campaigns, including whether they measure avoidance.

Survey respondents were asked first whether they measure and evaluate their work. 71% said yes, 26% said no and 3% did not know.

A correlation was run to determine the relationship between the organizational expectation for measurable communications objectives and whether PR practitioners measured their efforts (see Table 24). Respondents who said there was an expectation were most likely to measure, those who said there was no expectation most likely not to measure and those who did not know if there was an expectation were most likely to say they did not know if they measured their efforts.

Table 24

Correlation between answers to the questions Do you measure and evaluate your communications efforts? *and* Is there an expectation in your organization for measurable communications objectives?

	Expectation to measure	No expectation to measure	Don't know if there is an expectation to measure
Yes	0.38	-0.40	0.02
No	-0.40	0.46	-0.12
Don't know	0.01	-0.11	0.26

Another correlation was run on the relationship between whether PR practitioners measure their efforts and the sector they work in (public, private, not-for-profit sector; see Table 25). Those who work in the private sector were more likely to say they measure and those who work in the public sector were more likely to say they do not.

Table 25

Correlation between answers to the questions Do you measure and evaluate your communications efforts? *and* Do you work in the private sector, the public sector or the not-for-profit sector?

	Private	Public	Not for profit	Combination
Yes	0.23	-0.30	0.04	0.18
No	-0.30	0.38	-0.01	-0.17
Don't know	0.16	-0.16	-0.08	-0.05

Survey respondents who said they measure their work (n=74) were asked at what points they engage in M&E. Almost all (93%) said after a campaign is complete, 70% said during a campaign and 45% said before. Those same individuals were asked about the impact measurement has on their work (see Table 26). The top answer (89%) was that it allowed them to report to their boss or others about the impact of their work. That was followed by giving insight to create better tactics (86%), providing lessons to make future campaigns better (86%), providing insight as to whether objectives were achieved (85%), allowing for mid-campaign strategy adjustment (74%) and helping improve the PR practitioners' credibility in the organization (66%).

Table 26

Survey question: What impact does measurement have on your work? Select all that apply.

Response (*N*=74)	n	%
Allows you to report to your boss/others about the impact of your work	66	89.19%
Gives insight to create better tactics	64	86.49%
Provides lessons to make future campaigns better	64	86.49%
Provides insight as to whether objectives were achieved	63	85.14%
Allows you to adjust your strategy during the campaign	55	74.32%
Helps improve your credibility in the organization	49	66.22%

C-suite and non-C-suite communicators were asked about how they measure and evaluate their work. The top three themes from C-suite communicators were: based on the campaign's connection to business results/goals (i.e., reputation, sales, employee favourability, brand trust, etc.) (85%); ongoing monitoring and research such as social media monitoring and media coverage, website analytics and surveys (46%); and campaign specific output and outtake metrics (i.e., what traction a story is receiving, brand awareness, media coverage including tone) (38%). All non-C-suite communicators said they measure on an ongoing basis looking at channel analytics as well as engagement and qualitative feedback on newsletters/social/emails/etc.

Survey respondents who said they did not measure (n=27) were asked why not. As shown in Table 27, the top two answers (56% each) were that there was no expectation for it to happen and that they measure sometimes but inconsistently. Other answers included that they did not have time (48%), the right tools (44%), budget (41%) or knowledge (15%).

Table 27

Survey question: Why [do you] not [measure]? Select all that apply.

Response (*N*=27)	n	%
There's no expectation for it to happen	15	55.56%
We measure sometimes, just inconsistently	15	55.56%
Don't have time	13	48.15%
Don't have the right tools	12	44.44%

Don't have budget for it	11	40.74%
Don't know how	4	14.81%

C-suite and non-C-suite communicators were asked about issues they had experienced in effectively measuring and evaluating their work. Answers from C-suite communicators were mixed but included that it was difficult in general (getting people to answer surveys, getting leaders to understand its value, getting the right data) (38%), lack of budget (31%), lack of time (23%), lack of comparability across datasets (23%) and difficulty in connecting efforts to the bottom line (23%). The biggest issue for non-C-suite communicators was connecting efforts to the bottom line (50%).

Finally, communications experts were asked why M&E does not happen. The top two answers (64% each) were lack of knowledge and lack of budget. Those were followed by fear of finding out and difficulty in connecting communications efforts to the bottom line (36% each).

Measuring avoidance

All survey respondents were asked whether they evaluate the impact their work has on helping their organization avoid negative things like bad publicity, boycotts, lawsuits, strikes, etc. Half (50%) said no, 36% said yes and 13% said they did not know. Those who said yes (n=37) were asked to expand on how they evaluate their impact on avoidance; of those who answered (n=24), 46% each said through monitoring sentiment and/or press coverage and 17% said they look for some type of behaviour change (i.e., that a boycott was avoided, whether sales were impacted). One individual wrote about a specific metric they use that considers influence, engagement and relationship factors such as trust, control mutuality and reciprocity.

C-suite and non-C-suite communicators were likewise asked about measuring avoidance; while 23% (n=3) of C-suite communicators had a kill/squash metric, the majority (77%) did not formally measure. No non-C-suite communicator had a process for measuring avoidance.

Communications experts were asked how PR practitioners could measure avoidance; while the top answer (57%) was to use case studies either from previous experiences in the organization or peer organizations in the same industry, the next highest response (36%) was that any metric would be made-up or unhelpful because of nuances and/or unpredictability in the situation, organization, etc.

Effectiveness of efforts

Finally, survey respondents were asked, based on the use of measurable objectives, how effective they believed their communications efforts to be. As shown in Table 28, 81% of respondents said moderately effective or higher; 8% said slightly effective, 1% said not at all effective, 8% said they do not use measurable objectives and 2% said they did not know.

Table 28

Survey question: Based on the use of measurable objectives, how effective do you think your communications efforts are?

Response (*N*=104)	n	%
Extremely effective	4	3.85%
Very effective	37	35.58%
Moderately effective	43	41.35%
Slightly effective	8	7.69%
Not at all effective	1	0.96%
We don't use measurable communications objectives	8	7.69%
Don't know	2	1.92%
Prefer not to answer	1	0.96%

Respondents were asked to explain their rating of how effective their communications efforts are; 44% (n=46) provided a response. Responses were grouped by themes (see Table 29). Of those who responded who had said their efforts were extremely effective, all (n=3) said they had mature measurement systems in place: they use best practices, can prove ROI and/or have confidence in their methods. Those who said their efforts were very effective had similar feedback; 68% had mature measurement methods: setting realistic targets they were able to achieve, tracking behaviour and seeing positive impact from their work. 11% (n=2) of respondents who said their efforts were very effective suggested they had a lack of control; these were related to creating SMART objectives for clients (both worked in an agency setting) but acknowledging they were not in control of whether clients would adhere to/use them. Those who said their communications efforts were moderately effective were most likely to point to a lack of control as a reason for their rating; leadership did not expect measurement or wanted outdated metrics (such as ad value equivalency), the industry they work in is too complex to move the needle on initiatives, they do not have control over measurement tools used in their organization, they have limited time to execute campaigns and so on.

Table 29

Survey question: Please explain/expand on your answer to the previous question.

Theme	Extremely effective (N=3)		Very effective (N=19)		Moderately effective (N=16)	
	n	%	n	%	n	%
Mature measurement	3	100.00%	13	68.42%%	1	6.25%
Lack of control	0	0.00%	2	10.53%	10	62.50%
Need more resources	0	0.00%	0	0.00%	4	25.00%
Hard to prove ROI	0	0.00%	0	0.00%	2	12.50%

A correlation was run between responses to the questions of whether survey respondents measure and evaluate their work and how effective they believe those efforts to be (see Table 30). There was a correlation between those who said they measure and suggested their efforts are very and extremely effective. There was also a correlation between those who said they do not measure and those who said efforts were moderately effective. Further analysis of the results found that 15 individuals who said their efforts were moderately effective answered ‘no’ to the question of whether they measure at all. Two individuals who said their efforts were very effectively likewise answered ‘no’ when asked if they measure their work.

Table 30

Correlation between answers to the questions Do you measure and evaluate your communications efforts? *and* Based on the use of measurable objectives, how effective do you think your communications efforts are?

	Extremely	Very	Moderately	Slightly	Not at all	Don’t use measurable objectives
Yes	0.13	0.34	-0.15	0.10	-0.15	-0.45
No	-0.12	-0.35	0.17	-0.09	0.17	0.41
Don’t know	-0.03	-0.01	-0.03	-0.05	-0.02	0.17

RQ4: How can PR practitioners, who are not currently engaging in M&E, begin measuring their efforts?

If a PR practitioner is not measuring and evaluating their efforts, the idea of starting can be daunting and/or seem overwhelming. To address this, this research question relied on suggestions from C-suite communicators and communications experts about how to begin. It also included intel from survey respondents about what types of resources would be helpful for them to implement better M&E practices.

C-suite communicators, non-C-suite communicators and communications experts were all asked how practitioners not currently measuring or evaluating their efforts could start, specifically in low- or no-cost ways if they do not have allocated budget for M&E. As shown in Table 31, the top answer from each group was to start small and use available data including from other departments in the organization (HR, marketing, advertising, etc.) and owned channels (i.e., website, social analytics). The second highest response from each group was using free or inexpensive resources or tools such as frameworks and research from the Institute for Public Relations and AMEC, Google Forms, SurveyMonkey and social listening/text analytics/media monitoring platforms (which often have a free trial period). C-suite communicators and experts suggested that starting small and beginning to show value/impact to leadership could lead to more investment in the communications measurement function. Almost a quarter of both experts and C-suite communicators suggested that PR practitioners should expect to spend money for a good measurement practice; one expert summed it up by saying, "You get what you pay for" (Communications Expert #2, personal interview, August 23, 2023).

Table 31

Interview question (communications experts and C-suite and non-C-suite communicators): How can practitioners not currently measuring or evaluating their efforts start – specifically in low- or no-cost ways?

Theme	Experts (N=14)		C-suite (N=13)		Non-C-suite (N=4)	
	n	%	n	%	n	%
Start small/use what is available	11	79.57%	8	64.54%	4	100.00%

Use free/inexpensive resources/tools	8	57.14%	6	46.15%	3	75.00%
Measure before, during and after campaigns	5	35.71%	2	15.38%	0	0.00%
Connect to broader goals	6	42.86%	4	30.77%	1	25.00%
Expect to spend money	3	21.43%	3	23.08%	0	0.00%
Build team data literacy	0	0.00%	3	23.08%	0	0.00%

C-suite communicators, non-C-suite communicators and experts were asked where they see the future of communications M&E (see Table 32). The top three answers for each were deeper/faster/better insights, supported by artificial intelligence (AI) and having a stronger connection to business. There was belief that insights would be deeper/faster/better as tools improve and become available at lower costs. There was also a feeling that the PR field would start to become more of a science and adopt some of marketing's practices. AI was a key theme as interviewees from all three groups highlighted the potential held in using it to identify more quickly what to focus on, though several individuals commented on how poor understanding of the technology could lead to erroneous models/data. There were also suggestions that PR practitioners would get better at ensuring their work was aligned with broader business strategy and be able to draw a connection between their work and business goals which could elevate the communications function.

Table 32

Interview question (communications experts and C-suite and non-C-suite communicators): Where do you see the future of M&E?

Theme	Experts (N=14)		C-suite (N=13)		Non-C-suite (N=4)	
	n	%	n	%	n	%
Deeper/faster/better insights	10	71.43%	6	46.15%	2	50.00%
Supported by AI	6	42.86%	5	38.46%	3	75.00%
Stronger connection to business	4	28.57%	6	46.15%	1	25.00%

Finally, survey respondents were asked what types of resources or support would help them implement better M&E practices. As shown in Table 33, top answers included a guide/framework showing how to measure and evaluate (59%), access to M&E tools (55%), a dedicated M&E budget

(53%) and a dedicated person on the team (48%). Answers shared in the 'other' category included training and more time to engage in this type of work.

Table 33

Survey question: What kind of resources/support would help you implement better measurement and evaluation practices? Select all that apply.

Response (*N*=104)	n	%
A guide/framework for how to measure and evaluate your work	61	58.65%
Access to measurement and evaluation tools (i.e., Meltwater, Cision, etc.)	57	54.81%
More money for measurement and evaluation	55	52.88%
A dedicated person on the team	50	48.08%
Other	15	14.42%

Discussion

The purpose of this research study was to understand how PR practitioners could better measure the impact of their efforts. The following discussion pulls together insights from the literature review, survey of Canadian PR professionals and interviews with both communications experts/thought leaders and C-suite communicators.

RQ1: How and to what extent do PR practitioners know they are connecting with their stakeholders, audiences and publics and what evidence do they have that shows they are doing it?

Canadian PR practitioners have an opportunity to better understand their audiences

While the survey of Canadian PR practitioners found that most respondents gather at least some information about their audiences through a variety of methods, one fifth said they do not gather any information (or do not know if they do) and, of those who said they do gather information, almost 60% said they do so at least partly through assumptions. Less than half gather information about behavioural and media consumption habits and further, only a quarter of respondents said they collect detailed psychographic information including audiences' values, desires, lifestyle, political views, etc.

These findings are indicative of communications functions not being able to fulfil their strategic role of understanding audiences to identify how an organization can work best with them in a mutually beneficial way (Grunig, 2013). While 68% of respondents said they gather demographic information, Weiner (2021) pointed out that demographic buckets are no longer effective “when so many other supporting factors emerge, such as living situation, shopping preferences, household income, and more” (p. 157). In fact, communications experts interviewed for this study talked about the importance of being more specific in categorizing individuals based on beliefs/views – one highlighted how critical that was during the pandemic when attempting to communicate about the COVID vaccine, for example. Guidance from the World Health Organization backs this up; a manual about COVID vaccine safety communication advises that the development of evidence-based messages should include listening proactively to identify various audiences including their line of thinking, concerns and questions, highlighting that failure to do so “may result in incomplete or incorrect understanding of audiences and missed opportunities to respond to issues” (World Health Organization, 2020, p. 10). Likewise, if PR practitioners are unaware of how their audiences behave and where they get information, how will they know what messages will resonate and in what places?

Both communications experts and C-suite communicators spoke of the importance of talking and/or listening to audiences and gathering intel through secondary research and/or existing data in the organization. As one expert said, “You have to get in their heads either purposely or through second-hand sources” (Communications Expert #12, personal interview, September 18, 2023). Importantly, communications experts specifically called out the need to challenge assumptions about audiences suggesting intentional work to use critical thinking and look for contrarian views to avoid confirmation bias – all in the name of better understanding audiences to lead to better communication. As one example, an expert provided the reminder that not everyone is on Twitter or TikTok or reads the New York Times. One communications expert also highlighted that understanding audiences can and should be a multistep process:

> We do the research before planning but then once we think we’ve developed the right plan and we start developing materials, there’s another opportunity to pre-test those materials with a small group to make sure it actually lands the way we were hoping it would land. (Communications Expert #12, personal interview, September 18, 2023)

More than two thirds of experts suggested the need/benefit of using tools and/or paying for research to get good audience insights. For those without access to funds, an investment of time can be used to look at information shared through media and polling companies, Google Trends, the organization's own analytics (i.e., website, social media) and doing small, informal research (i.e., not every survey needs to be done by a research firm for thousands of dollars).

The benefit of better understanding audiences is enormous: it can lead to a more strategic, intelligent prioritization of who to speak with and how; help avoid risk for the organization by proactively identifying audience concerns and potential unintended publics; and provide valuable insight into how to deepen a long-term relationship with audiences in a way that helps the organization thrive (IPR Measurement Commission, 2022; Matsuitz, 2022). PR practitioners have multiple additional tools at their disposal including the situational theory of publics and problem solving to better segment publics and help create advocates for the organization (Kim & Grunig, 2011).

PR is about two-way communication

If one of the critical roles of PR is to cultivate relationships with audiences, two-way symmetrical communication is needed where PR practitioners both talk *and* listen to their audiences to understand their needs, desires and concerns (Grunig, 2013). In the survey, more than a third of respondents (38%) shared that they do not have processes to listen to their target audiences or stakeholders. Those who said they did listen (59%) did so through direct feedback, social listening, surveys and direct outreach.

When asked about confirming that communications efforts reached their audiences, the second highest answer from survey respondents (40%) was that they simply assume and 13% said they had no way of assessing whether their efforts connected. Almost two thirds of respondents said they use social listening, a third said survey and then others used web/social analytics, calls to action and media coverage. These findings align with the literature; Macnamara (2016a) found that many PR practitioners engage in SOS – *sending out stuff* – despite listening to audiences being a proven way to improve business operations and reduce employee turnover, lost productivity and risk of crisis. Those who do not listen to their audiences are engaging in a more press agentry-style of communication where they are simply broadcasting information (Grunig, 2001). While reasons for doing this may include lack of time or budget, it prevents PR practitioners from doing their job well – PR can only persuade people once they understand who they are talking to and what will be persuasive to them (Sydney Lectures, 2022).

C-suite communicators were asked about how they engage in dialogue and their responses were related to directly interacting with audiences via discussions or research and engaging in social listening. Examples of how this happens included turning to online communities/panels, gathering anecdotal information (i.e., from staff, friend of a friend), asking direct questions (i.e., what do you think are the top three priorities in the organization), gathering reaction at targeted engagement events and through traditional methods such as call centres and email. A non-C-suite communicator summed up their approach saying, "If we are communicating out on a channel, we should also be listening and responding on that channel" (Non-C-Suite Communicator #2, personal interview, August 18, 2023). A C-suite communicator spoke about the importance of dialogue, saying:

> When I started my career – like one of my first real jobs was in government… and one of the things that I recoiled from was this idea that if we said it, everyone believed it. [The government was] like, "We put out a press release, everyone must know about this" and that was just never really true and so now with social, etc. people talk back to you so that idea of paying attention to the feedback loops is really important. (C-Suite Communicator #5, personal interview, August 25, 2023)

While most survey respondents identified at least some methods for gathering information about and listening to their audiences, the percentages of those who do not indicates a need for better practices to be embedded across communications teams. Efforts to understand and connect with audiences do not have to be costly but do require time investment – which will save time and money in the long run if PR practitioners are being more efficient and effective in their efforts based on real data about who they are talking to, what type of communication will be most effective and an understanding of how best to reach them.

RQ2: What role do measurement and evaluation play in the formation of PR practitioners' efforts?

Environmental scanning should be a more regular, strategic process

Understanding environmental factors outside of an organization is important to identify potential risks or issues, elements that will influence how communication may be received or interpreted and highlight opportunities. This research found an inconsistent approach to environmental scanning by survey respondents and C-suite communicators. While some C-suite communicators shared practices for scanning via social/media monitoring and looking at industry news and analysis, only half identified a regular process for understanding trends outside of their own organization; those who did not have a process either did not understand the question or suggested they would only look externally when/if there was a specific issue they were dealing with. Survey respondents were simply asked how frequently they conduct environmental scanning and answers ranged greatly with a third saying daily, 10% saying weekly, 7% each saying monthly, quarterly and annually and 17% saying either never or they did not know (indicating that it was not a practice).

Communication experts had many suggestions for how PR practitioners could incorporate environmental scanning into their practice, most highlighting the importance of situating the organization in the industry/compared to competitors and using research to understand how communications could be more effective. Experts suggested that social listening, media monitoring and research/tools could help with this and recommended sites/tools such as Reddit, Twitter monitoring, TalkWalker and Answer the Public and looking at polls and trends shared in the news.

Additional methods of environmental scanning recommended by experts included focusing on the issues that matter most to the organization/its industry and looking at specific audiences and/or influencers. One expert summed it up, saying:

> What you're looking at is what's going on in our environment or in the landscape where we are operating, who are our peers or our competitors, and really take a look at what they're doing, what are the strengths, weaknesses, opportunities and threats of our own organization, what are some trends on the horizon that we should be aware of, is there an opportunity amidst all this so I

> mean I think you have to really become an expert in the space where you operate. (Communications Expert #7, personal interview, September 11, 2023)

Several experts mentioned that, by being specific about the issue, they could learn more about the people who were key influencers or especially active in the area. A couple experts mentioned looking at what they referenced as *the 10%*:

> the 1% who are disproportionately shaping the agenda, creating the original content, active or not, on these issues and then the 9% are the ones that are following that one percent and they're kinda more the curators and the amplifiers and it's the 10% of those together that are affecting the rest of us 90% causal lurkers. (Communications Expert #2, personal interview, August 23, 2023)

Experts also recommended simply scanning the environment by talking to people inside the organization and asking what they are hearing, seeing and thinking should be paid attention to. One expert shared the example of Salesforce having a Slack channel dedicated to employee grievances for early awareness of potential issues (Coblentz, 2022).

Communications efforts cannot be measured if there are no measurable objectives

Being able to effectively measure communications efforts requires identifying what is to be measured. While this may sound like common sense, many PR practitioners set objectives that do not have a measurable element such as *generating awareness* or *getting media traction*. These can become measurable by having a baseline, goal and timeframe so, for example, if research shows that 20% of the target audience is currently aware of an initiative, a PR practitioner could set an objective to increase that awareness by 5% by a certain date.

The survey of Canadian PR practitioners showed significant room for improvement in this area. Only 12% of respondents said their recent communications plans always had measurable objectives, 27% said most of the time, 11% about half the time but half of respondents fell in the sometimes (40%) or never (11%) categories. When asked to share an objective from a recent communications plan, only 12% (n=7) of those submitted had all elements of a SMART objective; most were not measurable while some were but had no timeframe. Almost a third (n=18) used the phrasing *generate awareness* with only three having an associated percentage (by how much).

Several correlations were run to understand the circumstances that led to a higher likelihood of more frequent use of measurable objectives and a few key trends were identified. First, those who worked in the private sector were more likely to say there was an expectation in their organization for measurable objectives while those in the public sector to say there was not. Then, those who worked in the private sector were more likely to say they had measurable objectives most of the time or always while public sector was most likely to say never. Finally, those who identified that there was an expectation for measurable objectives were more likely to say they had measurable objectives half or most of the time or always, while those who said there was no such expectation were most likely to say they never used measurable objectives.

These findings suggest a couple of key learnings: if PR is not expected to demonstrate its value in a measurable way, PR practitioners may take advantage of that – as one communications expert said in an interview, PR often sits under the radar "relative to… peers in other more analytically rigorous disciplines within the organization" (Communications Expert #2, personal interview, August 23, 2023) and there may be fear in changing that and being held more responsible for demonstrable results. The other learning is that those in the private sector may be more likely to measure their work than those who work in public sector organizations. This may potentially be due to a more intentional focus on maximizing profit and reducing costs in private organizations but indicates that those teams are likely not only better able to demonstrate their value but, by doing so, also able to gather important learnings from their work that leads their efforts to be more efficient and effective at achieving goals.

Communications is a business function supporting business goals

Not all measurable objectives are created equal; while outputs and outtakes can be useful to track interim results building to a larger goal, PR practitioners can and should be thinking about outcomes and organizational impact. Survey respondents were asked to select all types of metrics their recent objectives focused on and the results showed a high propensity for surface level; 86% said awareness, 51% social media engagement, 46% each media stories/reach and website traffic. It was not until the fifth highest that an outcome appeared (attitude/behaviour – 44%), only a quarter said reputation change, 13% return on investment and 10% donations. The lowest chosen metric was sales/pipeline/revenue at 6%. This, despite most respondents (92%) saying their communications objectives tend to come from business objectives.

Non-C-suite communicators were strong in their messaging that it can be difficult to connect communications efforts to business results; one pointed out that:

> It's hard to measure how marketing and communications impacts… business because you can't really track how like a press release contributed to X business deals done, you know, but we're able to at least measure sentiment in public channels which can be tied to our reputation and how we're perceived by both recruits, potential recruits, current employees, investors and our business partners. (Non-C-Suite Communicator #1, personal interview, August 15, 2023)

This was a common theme; another non-C-suite communicator highlighted that understanding what resonates with an audience on a channel is important as it allows for actionable insights to guide how posts and messages are shaped and shared.

C-suite communicators also suggested that outtakes can be useful as proxy measures to show progress towards a larger goal. One shared an example of the business outcome being *support for opening a new location in a community* and trust being a key element to gaining that support, so communications would then work to produce content that built trust in the company and its vison for the future. More than two thirds of C-suite communicators talked about how objectives should at least start with a look at business goals and a third about the importance of focusing on outcomes.

Several communications experts talked about the need to not only understand the business goal but to critically think through whether the communications strategy would support it. For example, one expert suggested that if the goal is behavioural, the objective should not be related to awareness or knowledge. Another said that having aligned objectives would help eliminate what they referred to as *random acts of tactics* that are not connected. Four experts suggested running communications objectives by executives/leadership to ensure alignment on what is reasonable, meaningful and measurable or to get agreement on the *definition of success*. The other theme that came through from experts was that objectives must be able to be measured, meaning they need clear definitions (i.e., instead of vague terms like buzz, hype, spin), the right tools to accurately measure (i.e., awareness can only be measured via a survey) and a baseline to compare with.

Research about formative research in communications is clear: PR practitioners who scan their environments to understand potential issues and opportunities and set specific, measurable, achievable, relevant and timebound objectives that are based on business goals set themselves up to achieve something meaningful for the organization (Anderson et al., 2009; Paine, 2007). While formative research may take time, it is critical in helping reduce wasted or ineffective effort throughout the campaign by using insights to drive strategic action (Matsuitz, 2022).

RQ3: How and to what extent do PR practitioners measure and evaluate their work?

An inconsistent approach to measuring communications efforts

Businesses run on numbers – funding dollars, sales, employee headcount, share prices, etc. and there is an expectation that those who work in a business are identifying how their work contributes to the overall functioning of the organization; HR reports on employee retention and vacancies, purchasing on procurement, customer service on satisfaction scores and complaints, etc. One communications expert said:

> Nothing in business is done without an after-the-fact evaluation to determine success… I don't think PR is any different in that sense than other specialities in the business or government or not for profit world in which you take a look back and say how did we do. (Communications Expert #9, personal interview, September 12, 2023)

Measurement and evaluation can also lead to smarter decision making; almost all interviewed communications experts talked about this, saying it can help better identify influencers, test messages, understand audience expectations, improve performance, make mid-campaign changes, eliminate blind spots, identify trends and more. One expert said simply, "Measurement is the vaccine for the stupid stuff" (Communications Expert #8, personal interview, September 12, 2023).

And yet almost a third of survey respondents said that they do not measure and evaluate their efforts or do not know if they do (indicating they do not). When asked why not, these individuals shared that measurement may happen inconsistently but there is no expectation for it to happen and they face a lack of time, tools and budget. One response to the ‘other’ selection was telling about how some feel about measurement: “It’s also hard being in the public sector because sometimes you don’t want media coverage on a project” – as though media coverage is the only metric worth tracking.

Survey results indicated that PR practitioners who work in the public sector were less likely to measure and evaluate their work than those in the private sector. In public sector, there should almost be more of a focus on measurement and evaluation; with limited capacity and budget (often), public sector PR teams do not have time or resources to waste on ineffective tactics – and the only way to determine if a tactic is effective is to measure it against SMART objectives. Public sector employees have the added responsibility of being fiscally responsible with taxpayer dollars; measuring the efficacy of their work and steps towards continuous improvement based on real data is one way to demonstrate accountability. Further, public sector employees – who work in government, healthcare, education, etc. – are often working on projects that have significant importance to people’s lives. For example, communication during the COVID pandemic about personal protective equipment, vaccinations and other safety measures was, in some cases, “a matter of life or death” (Amegorg, 2023, 0:38). Public sector PR campaigns can support increased screening to decrease cancer rates, enhance knowledge about the harms of smoking to reduce chronic illness and direct people to services to improve their physical activity, sense of community and education, as just a few examples. These would all benefit from an investment of time and research to determine how messages can be shared most effectively and then measured and evaluated to identify how future campaigns could be improved for maximum impact. In these cases, metrics tied to organizational goals seem obvious: knowledge and awareness of programs, increases in screening rates and program enrollment and so on – data that is likely already collected and could be accessed by PR teams to draw connections to their work. This becomes even more important when considering that in many public sector organizations, there is no marketing or advertising department so PR’s role is vital as that may be the main or only way information about these resources, services and programs is shared externally.

C-suite communicators were asked about issues they had experienced in effectively measuring and evaluating their work and they shared similar responses to the survey – lack of time, budget and access but also that it can be difficult for a range of reasons including getting people to answer surveys and explaining value and nuances to leadership. While just one C-suite communicator shared that their team had a lack of data literacy contributing to an inconsistent practice, almost two thirds of interviewed experts suggested a lack of knowledge was one of the main reasons for poor M&E. They talked about people going into PR to avoid working with numbers, a lack of M&E focus in PR education curriculum, a lack of understanding of how to apply academic research in practice and lack of knowledge about how to use M&E to look forward rather than just back. Budget was another flag from the experts saying that communications measurement sometimes feels like something extra to clients or leadership and so they are not willing to invest; one expert said they moved to the United States from Canada because organizations there seemed to be more willing to invest in M&E. C-suite communicators talked about this as well, suggesting that clients often want money to be *working dollars* as opposed to dedicated to analysis. This, despite interviewed communications experts pointing out that advertising and marketing use a portion of their budgets to justify said budgets, something they suggested PR could learn from. Several experts also raised the idea of what one called FOFO – *fear of finding out*. If PR functions have not been measuring their efforts to date, what happens if they start and find out their efforts are not working? One expert suggested there is a perception that making mistakes is bad but said that mistakes can and should be celebrated because they provide important learnings. One expert shared that:

> I had one boss once tell me saying, “I don’t wanna measure my communication.” “Why not?” “Well because then you know people will look at us and say well, you’re not having any impact...” So better to be silent and be thought a fool than to open one’s mouth and remove all doubt? I mean, I want to know if what we’re doing isn’t working so we can do something else, I mean that’s what we do. (Communications Expert #1, personal interview, August 21, 2023)

Survey respondents who said they do measure their work do so mostly once the campaign is complete (93%) but also during the campaign (70%) and, to a lesser extent, before the campaign begins (45%), indicating an education opportunity about the importance of formative research to set a campaign up for success. Critically though, survey respondents who do measure were able to see the connection between that practice and multiple benefits including reporting to their boss about the impact of their work, giving insight to create better tactics, identifying whether objectives were achieved, providing lessons to make future campaigns better and understanding how to adjust a strategy mid-campaign. Correlations found that survey respondents were more likely to measure their work when there was an organizational expectation for measurable objectives and if they worked in the private sector, again suggesting that a sharper focus on deliverables in the private sector may contribute to better M&E practices and an executive expectation may influence PR's likelihood of engaging in M&E.

There is no easy way to prove a negative

Grunig (2013) wrote that PR could help reduce "the *costs* of litigation, regulation, legislation, and negative publicity caused by poor relationships" (p. 9). Part of this research question aimed to understand whether there were metrics in use either by Canadian PR practitioners and/or C-suite communicators to track that impact. The answer was mainly no. Less than a quarter of C-suite communicators interviewed had a metric and, in all cases, it was just the number of stories or issues that had been killed/squashed by PR; there was no attempt to quantify the benefit to the business. While a third of survey respondents said they did evaluate the impact their efforts had on helping the organization avoid negative things like bad publicity, boycotts, lawsuits, strikes, etc., the majority said they looked at sentiment or press coverage to demonstrate impact, again, rather than quantifying the cost value to the organization.

When asked about measuring avoidance, interviewed communications experts were mixed: while just over half suggested using case studies from either previous issues/crises in the organization or peer organizations to show what *could* happen, a third of experts said any metric would be made-up and/or unhelpful because of the countless nuances associated with the particular issue. The question brought out some strong feelings from some, with on expert saying:

> I mean you could argue if this happened then it could have gone crazy but it's such hypothetical b-------, that's what gives measurement a bad name…. We need to stick to the truth. Now the truth is if we, because we didn't do it, you have no noise. That's good. (Communications Expert #14, personal interview, October 2, 2023)

Another expert suggested crisis response measurement was a better way to demonstrate value because:

> Measuring avoidance, I think that's kind of like, you know, send me a picture of what you didn't receive – that's impossible – but you know show me something that's damaged and then how it was repaired or what the process was to repair it and I think that's in my mind a more linear approach. (Communications Expert #13, personal interview, September 18, 2023)

M&E expert recommendations shed little light on how to measure avoidance; Paine (2022) wrote that "keeping bad news out of the press is not something you can readily express in charts for the quarterly report." In an article titled *Crisis management for the crisis you avoided,* Paine's suggestions are more related to issue/crisis management rather than avoidance: using measurement to identify when there is an issue, how the organization is faring against the competitors and using case studies as baselines (Paine, 2022).

A major opportunity to determine and prove effectiveness

The final question respondents were asked in the M&E section of the survey was about how effective they believed their communications efforts to be based on the use of measurable objectives. The majority (81%) said moderately effective (41%) or higher. A closer look at the numbers, however, found that 15 individuals (out of 43) who said moderately effective responded earlier in the survey that they did not measure and evaluate their efforts. Similarly, two individuals who said very effective responded that they do not measure. This indicates a disconnect and a call back to the issue of PR practitioners using intuition or gut instinct – if one is not using measurable objectives, how is one determining success?

When asked to explain their effectiveness rating, fewer than half of survey respondents chose to provide an answer. From those who did, it became clear that those who answered extremely effective or (for the most part) very effective were certain in their success because they used mature measurement methods – they could tie their work back to the organization's success, they used lessons from previous campaigns to improve on future ones, etc. But for those who answered moderately effective, the majority (63%) suggested there was some factor that was out of their control – the team is new, they work in a small industry, they do not have budget, they use metrics that someone else wants even if they acknowledge it probably they are not the best/most accurate/etc. One respondent wrote, "Usually if the client is happy with the reach of each story… then we have been successful. More stories = more success according to the company I work for – regardless if that's the right method." Another said, "Don't have direct involvement in follow up and methods of getting feedback. Intent always seems to be that we want to get the tactics, but not much on what value does it bring back." These types of *lack of control* comments suggest that some PR practitioners may be unaware of how to connect their work to the organization's goals and/or do not see themselves as appropriately positioned to measure/identify impact (i.e., as in the case with individuals who work in agencies and hand over suggested plans to clients but do no further follow up). This indicates an opportunity for PR practitioners to make it their responsibility to track their efforts and the associated impact (or lack of) in the name of continuous improvement and demonstrating their value. It may require PR practitioners be clearer on the definitions of success and take more responsibility for those goals and associated follow up which would reduce their dependency on others telling them what success should look like (Institute for Public Relations, 2012).

These findings also suggest a major opportunity to help PR practitioners understand how to demonstrate their impact and value using measurable objectives. Taking a more scientific approach and using standards would have countless benefits including the ability to compare results more easily across the industry, improved credibility, increased autonomy and the ability to use insights to continuously improve the function's efforts.

RQ4: How can PR practitioners, who are not currently engaging in M&E, begin measuring their efforts?

Begin simply; simply begin

This research question drew on the combined experience and expertise of 14 communications experts/thought leaders and 13 C-suite communicators to identify how PR practitioners could start measuring and evaluating if they currently have no practice in place. There were three major recommendations from both groups: connect communications efforts to business goals, use free/inexpensive tools and just start *somewhere*. Experts and C-suite communicators had numerous recommendations for how communications could *just start* – look at existing data on communications channels and from other departments in the organization, add a quality metric to volume coverage (i.e., instead of just *how many* earned media stories, look at message pull-through, headline mention, spokespeople, etc.), start tracking metrics to set baselines (i.e., event attendance, social followers), set SMART objectives, run pilots or A/B tests, engage in organizational listening/talk to people to better plan strategy, track the communication team's efficiency (i.e., time and cost on projects), etc. Even better than using these is looking at them through the lens of what is important to the business; C-suite communicators suggested demonstrating value to leadership could lead to increased budget/resources for the team.

One simple recommendation was to stop using vanity metrics, another was to create goals for the communications team by rolling up activities and successes into an annual report of how the function contributed to organizational success. One C-suite communicator said, "A professional has to understand what he or she is actually accomplishing and whether or not what he or she is doing is strategic in the sense that it's driving an organization, an institution, a brand, a person, forward – period. That's number one" (C-Suite Communicator #1, personal interview, August 14, 2023). Another suggested the importance of measurement for PR practitioners to maintain credibility and potentially their jobs:

> I think the most important thing the practitioners can do is stop being scared of this. And that would cost nothing, just wake up and realize that… unless you're completely secure in your position and you have a great relationship with your boss, as a professional, you need to demonstrate the value of what you do. (C-Suite Communicator #4, personal interview, August 24, 2023)

A simple suggestion from a non-C-suite communicator was to always consider two questions about data being collected: so what and now what:

> Any metric that you're looking at it's, you know, *so what* – like should I care about this?... Is it important? Like what's this actually telling me? And then *now what* – what do I do as a result of that? And that's like a lens that I think has always helped me… just like stop spending time on like things that aren't really that important and really hone in on like the things that are going to make an impact. (Non-C-Suite Communicator #4, personal interview, August 25, 2023)

Free/inexpensive tools and resources recommended included AMEC's integrated framework, research from the Institute for Public Relations, academic literature, SurveyMonkey, Google Forms and getting funds from leadership to attend measurement conferences or webinars, among others. One expert suggested finding an analysis tool with a two-week free trial and using it to measure a baseline and then impact on either side of a campaign with the goal of using that data to advocate to leadership for ongoing paid use of the tool. One expert suggested a lack of budget does not have to be a disadvantage: "Just having more tools doesn't actually make you smarter, it doesn't make your data better – that comes from how you process the data, that takes a human" (Communications Expert #11, personal interview, September 15, 2023). That was not a unanimous opinion; some experts and C-suite communicators suggested *you get what you pay for* and a portion of project funds should be dedicated to measurement. One C-suite communicator who leads an insights team could not fathom not measuring, saying:

> I just think about all the value our team has brought since starting here over the like last two years and like we are driving the planning process like we're the ones that are making sure everything's connected, things are strategic, laddering up and focusing on the goals… I do think it's a major loss if you don't [pay for measurement], especially we're in the business of changing perceptions so like how do you change perceptions without having any idea of where you stand with society or how to shape opinions? (C-Suite Communicator #13, personal interview, September 25, 2023)

Optimism about the future of M&E

Communications experts and C-suite communicators were also asked about the future of M&E; all answers were related to how PR practitioners could use data to increase their standing in the organization to be more efficient and effective. Both groups talked about how increased access to data would lead to deeper, faster and better insights that could support decision making in real time. Both groups also mentioned that PR would use this data to become more scientific and less based on gut/intuition by adopting more of marketing's best practices. A second theme was that artificial intelligence would likely play a role in helping PR practitioners see more clearly and quickly where focus was warranted though both groups were quick to point out that human judgement would always be needed, especially when AI is in its infancy and there remains a question about where *big data* is pulling from. The third major theme was that PR practitioners would use M&E to better connect their work to the organization's goals which could help elevate communications' credibility and inclusion in the decision-making process. One C-suite communicator said this shift to adopt data will require a business mindset: "If you expect to have an equal voice [in the C-suite] you need to be a businessperson first, not a communicator first… You have to be about using the tools of communications to solve business problems" (C-Suite Communicator #3, personal interview, August 23, 2023).

A guide to begin measuring

Survey respondents were asked what resources or support they would need to implement a better measurement and evaluation process; the top response was a guide or framework that explains *how* to measure and evaluate communications. As referenced in the literature review, there are existing guides including the AMEC integrated evaluation framework which provides a step-by-step approach to setting objectives that matter to both the communications function and the broader organization. One could speculate, based on trends seen throughout the survey, that it will take more than access to a guide for PR practitioners not currently measuring to start doing so as resources and models have long existed. It is more likely that the path to more consistent M&E will be through increased expectations from leadership and enhanced understanding of the benefit of measuring to communications' efficiency, effectiveness, credibility and likelihood of promotion. Understanding of M&E's importance by PR practitioners and leadership may also help deliver additional requests from survey respondents to support the practice: access to tools, money and a dedicated M&E person on the team.

Limitations

There were several limitations in the way this research study was conducted. First, all research – literature review, survey, interviews and analysis – was conducted by one individual (the researcher). While the researcher had supervisor support, there was no second look at any of the collected data or pass through of the analysis. The researcher did their best to clearly articulate codes for data analysis of the survey and thematic/content analysis of the interviews and checked their work through multiple times but may have missed items or made mistakes.

The way data was collected meant results could not be generalized to a broader population; the survey of Canadian PR practitioners was shared through convenience, snowball and purposive sampling (Stacks, 2017). A different approach to recruit a randomized controlled selection of PR practitioners across the country would have provided results that demonstrated broader understanding of the practice. These results were skewed towards those in similar roles to the researcher, specifically in healthcare and government. There was also a small (104) sample size.

Additionally, C-suite communicators were interviewed based on availability and recommendations (from other C-suite communicators); there were no intentional steps taken to ensure equal representation from public versus private sector, types or sizes of organizations, etc. As a result, interview results represent those interviewed rather than C-suite communicators in general.

The researcher designed questions for the survey, expert interviews and C-suite interviews based on the literature review and to answer the research questions. However, not all questions were aligned across the three; for example, C-suite communicators were asked *how* they conduct environmental scanning while survey respondents were simply asked about the frequency in which they conduct environmental scanning. In that specific case, there was a draft question for the survey about how environmental scanning was conducted that was removed in the interest of keeping the survey response time under 15 minutes to encourage more responses. This slight disconnect meant there may have been insights from one group that were not received from another.

Finally, this research was conducted by a masters-level student with limited experience conducting professional-level research. This inexperience may have impacted the results.

Conclusion and future research opportunities

The purpose of this research study was to understand how PR practitioners could better measure the impact of their efforts. Too often, PR practitioners focus on *doing things* – sending out press releases, posting on social – and associated short-term reaction from audiences – number of media stories, impressions, website views, etc. But outputs and outtakes do not drive business forward; that comes from connecting the work of communications to business and societal goals: improving reputation so organizations are better able to weather a crisis; bringing insights about needs and desires from audiences to the organization to ensure alignment and drive better outcomes; etc. (Grunig, 2013; Weiner, 2021). Doing this can be difficult if it is not already a practice and, as numerous communications experts interviewed pointed out, PR practitioners may be fearful to begin exploring the connection between their work and business impact lest they discover there is no connection. But the answer cannot be to dig one's head in the sand further; it should be to embrace curiosity and look at M&E to improve efforts to ensure better efficiency and efficacy of the team – in other words to stop wasting time on things that do not generate an impact and put more resources towards the things that do (Paine, 2007).

The survey conducted of 104 Canadian PR practitioners saw positive practices but also many opportunities for improvement: lack of understanding of the value and importance of listening and engaging in dialogue with audiences; inconsistent or nonexistent environmental scanning practices and SMART objective setting; too much focus on outputs and outtakes rather than outcomes and impact; and a lack of measurement culture within organizations. This was a small sample that was not collected through randomized controlled trial but aligns with the literature and points to countless opportunities for small changes that may have a large impact on the effectiveness of PR efforts and an increased ability to prove value within PR practitioners' organizations.

Interviews with C-suite communicators showed what better practices could look like: talking and listening to audiences directly; setting objectives that ladder up to what the executive team is concerned about; using tools and resources that are readily available; and *getting over the fear* in the name of better work – which all support the PR function in being seen as a value add rather than just a cost centre. One expert talked about their days at a C-suite level saying that when the CEO came to them in a tough time advising that two VPs were about to be let go and they asked if they should also begin prepping their resume, the CEO said, "God no, we can't afford to lose you – you've been helping us make money and save money" (Communications Expert #12, personal interview, September 18, 2023). As that individual said, "I just built [measurement] into everything we did… I was able to demonstrate why I did what I did and demonstrate that it worked because I was always gathering those kinds of numbers" (Communications Expert #12, personal interview, September 18, 2023).

Experts were aligned about the importance of M&E as well in leading to smarter decision making and proving communications' value. One expert said simply:

> Because without it, you have no idea what's working and what's not working. I think too much of public relations and communication as a whole… is done because somebody thinks it's a good idea or somebody hears somebody say something and they decide here's a good project to do… Just having the criteria for success makes all the difference in the world. (Communications Expert #8, personal interview, September 12, 2023)

Paine (2007) said PR should just be held to the same standards as others in a business:

> When faced with tough decisions, you'll never find your board of directors or CEO relying on hunches or gut instinct. Chances are any decisions made at the highest level of your company will be made following extensive research. So why should public relations and/or corporate communications be any different?... Just as the CFO relies on data to give advice and make recommendations, you need data to decide where, when, and how to allocate resources. (p. 7)

And, while PR practitioners may be afraid to set an organizational expectation for measurement, one expert suggested it is better they do it first rather than wait to be asked to do it suddenly with no understanding of how:

> The advice I typically give is y'all as a junior and mid-level practitioner should proactively take this to leadership as something you need to do before they are bringing it down to you and saying, 'We need to do this' cause then you're immediately on your back foot with it and you're scrambling rather than being seen as the hero for, you know, surfacing it to them. (Communications Expert #2, personal interview, August 23, 2023)

While these survey results are not generalizable to a broader audience, there were interesting correlations found, including that where there was an organizational expectation for measurable objectives, respondents were more likely to measure, and those who worked in private organizations were more likely to listen to their audiences, set measurable objectives and measure their work than those in the public and not-for-profit sectors. Those who measure their work were also better able to identify how effective that work had been based on the use of measurable objectives, allowing for learnings that could continue to enhance and improve their functions.

These insights provide opportunities for additional research including how PR teams in the public sector and not-for-profit organizations can adapt a more private sector mindset in demonstrating results and how and why certain organizations come to expect measurable objectives from PR while others do not. Understanding C-suite knowledge and expectations about PR's function and its contribution to organizational goals would also be insightful. Additional research could focus on how PR could incorporate best practices from marketing and advertising (i.e., segmenting audiences, using part of the budget to prove success) into their work. Further research could also focus on how to assign value to the risk mitigation work PR practitioners do that prevents crises from happening.

Importantly, themes from the interviews with communications experts and C-suite communicators made it clear that M&E is about *improving* communications – using research to strategically drive campaigns, provide recommendations, identify potential opportunities and issues, test messages to be more effective and prove communications' value to the organization. Mistakes may be uncomfortable but they support a cycle of continuous improvement based on real insights. As Macnamara suggested, it is broader than M&E – it is about MEL: measurement, evaluation *and learning* (Amecorg, 2023). These benefits can help PR gain a more positive reputation as a function that should be helping drive decision making at the highest level, rather than sending out press releases once decisions have already been made. It may take guts to start doing this but the alternative is worse: what if a new boss comes in who is expecting demonstrable results? What if budget or the team's size is going to be cut because it is unclear what the function is doing and another department can better prove a return? What if team members leave because they are frustrated with being asked to do work that does not seem to ladder up to a broader purpose? These are all reasons to begin measuring – even in a small way.

Questions about M&E in the communications field are not new and the numerous resources available indicate, again, a lack of knowledge and/or awareness from PR practitioners about the importance of M&E rather than a lack of access to resources. Drawing on insights gathered in this research, the researcher has created a step-by-step guide on how to start an M&E practice and will engage in a campaign to disseminate this knowledge and advocate for more strategic communications that uses M&E to drive its work to increase PR's standing in the organization, effectiveness and connection to purpose rather than intuition or gut. As Anderson et al. (2009) concluded in their guidelines for setting measurable objectives:

> In many cases, the public relations profession has allowed itself to rely on indeterminate goals in order to avoid being proven a failure. But by doing so, we disallow ourselves demonstrable success. The dictates of business demand more, and public relations will only earn higher esteem and more influence within the business mix, if it sets and demonstrates it has achieved measurable objectives clearly aligned with business objectives. (p. 14)

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Appendix A: Communications Measurement and Evaluation (M&E) Guide

Overview: The need for measurement and evaluation (M&E)

Public relations (PR) is a business function that is intended to support organizational goals. By demonstrating how PR contributes to business impact, the function becomes seen as a value add, rather than just a cost centre. This can enhance the function's credibility and bring PR into the decision-making process (or the dominant coalition), rather than just being responsible for communicating decisions once they've been made. Importantly, measuring and evaluating PR's efforts can lead to identification of what is and what is not working – with limited budgets and resources, PR teams are often at capacity; imagine if the team was able to focus exclusively on what was effective and say no to the things that are not. This is driven, in part, by formative research: before a campaign begins, it is critical that PR practitioners understand who they are talking to and the nuances associated with what, how and where messages are created and shared for maximum impact, and what is happening in the environment in which messages will be received. These insights take time to gather but help drive more strategic, focused campaigns that are informed by research and thus have a higher likelihood of achieving the desired outcome. For example, during the COVID pandemic, there were countless messages reminding people to mask. It was not a lack of knowledge that led some to stay unmasked; PR practitioners who understood those nuances and influences were better able to shape messages that resonated with and persuaded specific audiences.

While it may seem a daunting task to adopt an M&E practice, the key is to just start somewhere, become comfortable with holding your team to account and approach research with curiosity – measuring is not about finding fault but understanding how to be more effective moving forward. Missteps or learnings about what doesn't work should be shared as lessons for the entire team to improve.

This guide provides suggested steps to connect the work PR is doing to the organization's goals. One step does not have to be fully complete for the next to begin, in fact, many steps should continuously be happening. The process is iterative so learnings in one area may impact actions in another. Additional resources and examples are listed below.

Understand your organization's goals.

- Do: identify what the organization is trying to achieve and what is important to your CEO/executive team/what they would consider success
- By: talking to leaders, looking at the strategic plan/mission/vision/values

Identify how PR can support organizational goals.

- Do: consider what can reasonably be accomplished by communications (i.e., public support/advocacy, targets being met, staff/volunteer retention, customer retention, increase of sales or donations, etc.)
- By: identifying what/how you want people to either do, feel or think differently to achieve the organizational goal; potentially running PR goals by leadership to get agreement

Set baselines.

- Do: understand where the organization is currently at related to the PR and organizational goals to determine what PR can support/improve
- By: identifying where data lives in the organization i.e., on communications channels (i.e., website, social analytics), with other departments (i.e., HR for employee data, finance for sales, etc.); looking at competitors, past performance, industry benchmarks, etc.

Define who you're talking to.

- Do: identify and segment your stakeholders, audiences and publics
- By: using the situational theory of problem solving to identify to what extent different groups understand a problem, feel a connection to it, feel like they can do something about it and are willing to share information about it; conducting research to understand who your stakeholders, audiences and publics are and who/what influences them (i.e., websites, politicians, organizations, influencers, etc.), what inspires them, what scares them, etc.

Determine what you're trying to achieve with each stakeholder/audience/public group.

- Do: set objectives for each stakeholder/audience/public group
- By: identifying what success would look like for them (i.e., for customers – to buy product; for potential donors – to donate; for government officials – to introduce a beneficial bill; etc.)

Develop a relationship with your stakeholders, audiences and publics.

- Do: conduct research about and engage in dialogue with stakeholders, audiences and publics to better understand who they are demographically but also how different beliefs and values may impact their interpretation and acceptance or non-acceptance of certain messages
- By: talking to them (via communications) but also *listening* via social media, media, direct conversations, meetings, emails, surveys, focus groups, etc.
- *This will lead to PR being better able to identify potential issues or opportunities connected to the organization's goals; PR can identify recommended actions to seize opportunities or mitigate issues

Use environmental scanning to identify opportunities, issues and threats.

- Do: stay on top of key issues for your organization/industry, including key influencers/activists, competitors and regulation (if appropriate)
- By: using social listening, monitoring media including industry news and analysis, talking to people in your organization (i.e., ask them what they're hearing/seeing/think you should be paying attention to)

Set SMART objectives.

- Do: set campaign objectives that are specific, measurable, actionable, relevant and timebound
- By: using your knowledge gathered through research of the organization's goals, PR's potential impact, your stakeholders, audience and publics and what's happening in the environment; not using vague terms or ideas (like *generate awareness* or *get media hype*) but rather being specific about what, how much, who and when (i.e., improve (what) by (how much) among (who) within (when/timeframe)); making sure the objectives are connected to the communications' – and organization's – goals; using industry benchmarks and other research to determine what is reasonable; understanding that meeting or failing to meet targets might be a good learning opportunity that will inform future work

Define proxies for larger objectives.

- Do: identify what proxy metrics will help monitor success in the short term
- By: determining what metrics would indicate movement towards broader objectives/goals (i.e., if you are looking to increase reputation, positive media coverage/social sentiment may indicate a move in that direction)

Use tactics that are informed by your research.

- Do: identify which tactics are most likely to reach your stakeholders/audiences/publics and have the desired effect
- By: critically assessing the information you've gathered about your stakeholders, audiences and publics including where they get information, who they trust, what they're looking for and the environment in which messages will be received

During a campaign, look at outtakes.

- Do: monitor how your actions are having a short-term effect (or not) i.e., are stakeholders/audiences/publics receiving, paying attention to, understanding, retaining messages; make changes as necessary
- By: monitoring short-term metrics/proxies such as impressions, engagement, media pick-up, website visits, etc.; identifying how PR actions (i.e., sending out a newsletter) impact stakeholders/audiences/publics (i.e., increased web visits); looking at a combination of volume metrics (i.e., number of media articles), quality metrics (i.e., key message inclusion) and context (i.e., from comparison – either over time or with competitors)
- *Monitor behaviour compared to your interventions – i.e., if getting employees to sign up for training, track how many registrations happen on each day and then make a note where comms did something to identify if there was a spike/see what worked best

Use more in-depth research to determine achievement (or lack) of broader objectives.

- Do: track progress towards or success/failure of reaching broader objectives such as trust, reputation, sales, reduction in employee sick days, etc.

- By: conducting surveys to understand how your stakeholders, audiences and publics think, act and feel connected to your communications efforts and other factors; looking at relevant data elsewhere in the organization about broader goals

Post-campaign, report on your success and/or learnings.

- Do: take time to identify what worked or didn't, key learnings to improve future campaigns
- By: debriefing with and understanding experiences from everyone who worked on the campaign; creating a wrap report that highlights learnings and is shared with leadership/the client/team

Resources/recommendations:

- AMEC: A taxonomy of evaluation towards standards
- AMEC: Integrated evaluation framework
- AMEC: Planning worksheet
- AMEC: Taxonomy of evaluation towards standards
- Dictionary of PR measurement and research
- Guidelines for measuring the effectiveness of PR programs and activities
- Guidelines for measuring relationships in PR
    - Use the survey questions beginning on p. 28 as a guide to measure relationship qualities with your audiences
- Guidelines for setting measurable PR objectives: An update
- Misguided communication objectives
- The communicator's guide to research, analysis, and evaluation
- The PR professionals' definitive guide to measurement
- Free/low-cost tools:
    - Environmental scanning: Google Trends, TalkWalker, SocialWeb, Ask the Public
    - Surveys: SurveyMonkey, Google Forms
    - Tracking metrics: Google Analytics, MailChimp

- Note on surveys: if you want to change attitude or behaviour, ask your audiences:
    - What they believe or are doing now
    - Why they believe or are doing that
    - What knowledge they would need to change their belief or act differently

Examples

Keeping staff safe

A communications team ran a safety campaign to improve specific working behaviours (i.e., for lifting boxes, staying safe while driving trucks, etc.). After the campaign, they ran a survey asking staff, “Because of anything you read or saw as part of the campaign, which of the following behaviours have you paid more attention to in the last year?” (a cause-and-effect question). They noted how many people said they were paying more attention to avoiding certain types of accidents. They then went to HR and looked at data about accidents in the past year. They found that behaviours staff had said they were paying attention to were perfectly aligned with associated decreased accidents. Knowing how much money and loss of productivity it costs the organization when an employee has different types of accidents, the communications team was able to provide in actual dollars the return on investment for the organization of that communications campaign.

Keeping police on the streets

During the COVID pandemic, staff absence was an issue for many organizations – including police. One police force used communications to raise awareness about how to mask properly. Through a campaign that also included unannounced drop-ins/reminders, the team was able to increase compliance with the masking rules from 25% to 75%. Importantly, they were able to draw a connection between the campaign and keeping staff absences low; while police forces in other areas had up to a third of staff off sick at one time, this force was able to maintain close to regular levels (90% of staff available to work) throughout the pandemic.

Speeding up business operations

A communicator in the energy industry was supporting their organization in replacing part of a pipeline. There was controversy around the project because of concern for spills and the organization was anticipating that, instead of replacing the pipeline in Q1, it may be delayed until Q3 given disruptions. Using research about the issue, environment and audiences, the communicator led a media campaign, participating in interviews to pre-empt concerns various publics had with the project. The communicator led site visits with media, sent briefing notes to government officials and worked with local partners to address potential flags head on. As a result of their efforts, the pipeline was replaced a full quarter early, which translated to an additional quarter of revenue for the organization.

Appendix B: McMaster University Research Ethics Board Certificate of Ethics Clearance

McMaster University | Research Ethics Board

McMaster University Research Ethics Board (MREB)
c/o Research Office for Administrative Development and Support
MREB Secretariat, GH-305
1280 Main St. W.
Hamilton, Ontario, L8W 4L8
email: ethicsoffice@mcmaster.ca
Phone: 905-525-9140 ext. 23142

CERTIFICATE OF ETHICS CLEARANCE TO INVOLVE HUMAN PARTICIPANTS IN RESEARCH

Today's Date: Aug/09/2023

Supervisor: Dr. Terry Flynn
Student Investigator: Graduate student Amber Daugherty
Applicant: Amber Daugherty
Project Title: How and to what extent can communicators better measure the impact of their efforts?
MREB#: 6630

Dear Researcher(s)

The ethics application and supporting documents for MREB# 6630 entitled "How and to what extent can communicators better measure the impact of their efforts?" have been reviewed and cleared by the MREB to ensure compliance with the Tri-Council Policy Statement and the McMaster Policies and Guidelines for Research Involving Human Participants.

The application protocol is cleared as revised without questions or requests for modification. The above named study is to be conducted in accordance with the most recent approved versions of the application and supporting documents.

Ongoing clearance is contingent on completing the Annual Report in advance of the yearly anniversary of the original ethics clearance date: Aug/08/2024. If the Annual Report is not submitted, then ethics clearance will lapse on the expiry date and Research Finance will be notified that ethics clearance is no longer valid (TCPS, Art. 6.14).

An Amendment form must be submitted and cleared before any substantive alterations are made to the approved research protocol and documents (TCPS, Art. 6.16).

Researchers are required to report Adverse Events (i.e. an unanticipated negative consequence or result affecting participants) to the MREB secretariat and the MREB Chair as soon as possible, and no more than 3 days after the event occurs (TCPS, Art. 6.15). A privacy breach affecting participant information should also be reported to the MREB secretariat and the MREB Chair as soon as possible. The Reportable Events form is used to document adverse events, privacy breaches, protocol deviations and participant complaints.

Document Type	File Name	Date	Version
Interviews	Interview guide_one-on-one interviews	Jul/21/2023	1
Test Instruments	Survey questions	Jul/22/2023	1
Recruiting Materials	Survey and interview recruitment_email	Jul/22/2023	1
Consent Forms	Consent preamble_survey	Jul/24/2023	2
Recruiting Materials	Survey recruitment_social media	Aug/01/2023	2
Recruiting Materials	Snowball recruitment script_interviews	Aug/01/2023	2
Recruiting Materials	Screening question_survey	Aug/01/2023	2
Consent Forms	Oral consent log_interivews	Aug/01/2023	3
Consent Forms	Oral consent script_interviews	Aug/01/2023	3
Consent Forms	Letter of information_consent_survey	Aug/01/2023	2
Consent Forms	Letter of information_consent_interviews	Aug/01/2023	2
Response Documents	Summary of Revisions for MREB 6630 Daugherty	Aug/01/2023	1

Dr. Tara La Rose

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Associate Professor
School of Earth, Environment & Society
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Appendix C: Survey Letter of Information/Consent

How and to what extent can communicators better measure the impact of their efforts?

Student Investigator:
Amber Daugherty
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647-385-8963
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Faculty Supervisor:
Dr. Terry Flynn
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Purpose of the study

You are invited to take part in this study on how communicators can better measure and evaluate the impact of their efforts. This research aims to understand the current state of measurement and evaluation by Canadian communicators and recommendations for better practices from communications experts and thought leaders. These findings will support the creation of a practical model or framework to better help organizations measure and evaluate their work with a specific focus on those with limited budgets, resources and/or capacity.

I am doing this research for a capstone project under the supervision of Dr. Terry Flynn.

Procedures involved in the research

You will be asked to participate in an online survey that will take approximately 15 minutes to complete. During the survey, you will be asked questions about your communications/public relations practices, specifically how you understand and communicate with your audiences, set objectives and measure and evaluate your work. You do not have to answer any question you feel uncomfortable with – each question has "prefer not to answer" as a response selection. Survey results will be anonymous; you will not be asked to include your name, organization, email or any other identifying information.

Potential harms, risks or discomforts

The risks involved in participating in this study are minimal. You do not need to answer questions that you do not want to answer or that make you feel uncomfortable. I describe below the steps I am taking to protect your privacy.

Potential benefits

The research will not benefit you directly. I hope to learn more about how communicators can better measure and evaluate the impact of their efforts. This could help the communications/public relations profession better demonstrate its value.

Confidentiality

You are participating in this research anonymously. No one, including me, will know that you participated.

Participation and withdrawal

Your participation in this study is voluntary. If you decide to be part of the study, you can withdraw from the study for whatever reason, even after giving consent or part-way through the survey. To withdraw, simply exit from the survey. If you decide to withdraw, there will be no consequences to you. In cases of withdrawal, any data you have provided will be destroyed. If you do not want to answer some of the questions you do not have to, but you can still be in the study.

Once you have submitted your responses for this anonymous survey, your answers will be put into a database and will not be identifiable. This means that once you have submitted your survey, your responses cannot be withdrawn from the study because I (we) will not be able to identify which responses are yours.

Information about the study results

I expect to have this study completed by January 2024. I hope to share the results publicly – you may check my LinkedIn account (Amber Daugherty) at that time to see a brief summary of the results. Alternatively, you may email me to ask to be notified when results are ready.

Questions about the study: If you have questions or need more information about the study itself, please contact me at:

Amber Daugherty

daughera@mcmaster.ca

647-385-8963

This study has been reviewed by the McMaster Research Ethics Board and received ethics clearance under project #6630. If you have concerns or questions about your rights as a participant or about the way the study is conducted, please contact:

McMaster Research Ethics Office

Telephone: (905) 525-9140 ext. 23142

mreb@mcmaster.ca

Appendix D: Survey questions

Consent questions

1. Having read the above preamble, I understand that by clicking the "Yes" button below, I agree to take part in this study.
    a. Yes I agree to participate in this study
    b. No I do not agree to participate in this study
    c. No answer

Screening question

2. Do you work in communications/public relations in Canada? (i.e., as a consultant, analyst, communications coordinator/advisor/specialist/manager/director/VP, chief communications officer, in internal and/or external communications, corporate communications, media relations, social media, government relations, etc.)
    a. Yes
    b. No
    c. Don't know
    d. Prefer not to answer (*If the response is no, don't know or prefer not to answer, the survey will terminate with the message: "Based on your response, it looks like the rest of the survey won't apply to you. We'll end it here to not take up any more of your time. Thank you for participating."*)

Demographic questions

3. What is your title?
    a. Advisor
    b. Chief communications officer
    c. Consultant
    d. Coordinator
    e. Director

f. Manager

g. Senior advisor

h. Vice president

i. Other <free text>

4. What sector do you work in?

a. Childcare

b. Education

c. Energy/minerals

d. Government

e. Healthcare

f. Manufacturing

g. Technology

h. Transportation

i. Don't know

j. Prefer not to answer

k. Other <free text>

5. Do you work in the private sector, the public sector or the not-for-profit sector?

a. Private

b. Public

c. Not-for-profit

d. A combination of public/private/not-for-profit

e. Don't know

f. Prefer not to answer

6. How many years have you worked in communications/public relations?

a. 0-2

b. 3-5

c. 6-10

d. 11-15

e. 16+

f. Don't know

g. Prefer not to answer

7. How big is your immediate communications team?

a. 1 (just you)

b. 2-10

c. 11-20

d. 21-50

e. 51+

f. Don't know

g. Prefer not to answer

8. Approximately how many people in total work in communications across your organization?

a. 1 (just you)

b. 2-10

c. 11-20

d. 21-50

e. 51+

f. Don't know

g. Prefer not to answer

9. What is your communications' team's annual measurement and evaluation budget?

a. $1-999

b. $1,000-2,499

c. $2,500-4,999

d. $5,000-9,999

e. $10,000-24,999

f. $25,000-49,999

g. $50,000-99,999

h. $100,000+

i. We don't have a measurement and evaluation budget

j. Don't know

k. Prefer not to answer

l. Other <free text>

Audience questions

10. What type of information do you gather about your target audiences to inform your communications efforts? Select all that apply.

    a. Demographic (i.e., age, location, gender, profession etc.)

    b. Psychographic (i.e., values, desires, goals, lifestyle, political views, etc.)

    c. Behavioural (i.e., interactions with your organization, spending/purchasing habits, etc.)

    d. Media consumption habits (i.e., where they get their information from)

    e. We don't gather any information about our target audiences

    f. Don't know

    g. Prefer not to answer

    h. Other <free text>

11. If you answered "other" to the question above, please explain your answer here.

    **Question only viewable to those who answered "other" in Q10.*

    a. <free text>

12. Where do you get information about your target audiences? Select all that apply.

    **Question viewable to those who answered anything other than "don't know" or "prefer not to answer" in Q10.*

    a. Primary research (i.e., own study about them, focus groups, etc.)

b. Secondary research (i.e., Google, media, public opinion polls, etc.)
c. Media insights software/tools (i.e., Cision, Meltwater, etc.)
d. Assumptions (i.e., either your own or from your organization),
e. We don't gather any information about our target audiences
f. Don't know
g. Prefer not to answer
h. Other <free text>

13. What drives your tactics/channels/approach when creating a comms plan? Select all that apply.
    a. Research about where audience is most likely to be reached
    b. What's available
    c. What you used in previous campaigns
    d. Budget
    e. Client preferences
    f. Available time (i.e., where you can get information out quickly)
    g. Don't know
    h. Prefer not to answer
    i. Other <free text>
14. Do you have processes established to regularly listen to your target audience/stakeholders?
    a. Yes
    b. No
    c. Don't know
    d. Prefer not to answer
15. How do you listen to your target audience/stakeholders? Select all that apply.

    **Question only viewable to those who answered "yes" to Q14*

    a. Direct outreach (i.e., phone calls, emails, etc.)
    b. Social listening (i.e., via social media)

   c. Direct feedback (i.e., responses to newsletters, complaints, etc.)
   d. Surveys
   e. Don't know
   f. Prefer not to answer
   g. Other <free text>

16. When you run a communications campaign, how do you confirm whether your efforts reached your target audience? Select all that apply.
   a. Assumptions
   b. Social listening
   c. Survey
   d. We don't confirm whether target audiences were reached
   e. Don't know
   f. Prefer not to answer
   g. Other <free text>

Objectives questions

17. How frequently do you conduct environmental scanning?
   a. Daily
   b. Weekly
   c. Monthly
   d. Quarterly
   e. Bi-annually
   f. Annually
   g. Less frequently than annually
   h. Never
   i. Don't know
   j. Prefer not to answer

k. Other <free text>

18. Is there an expectation in your organization for measurable communications objectives?
    a. Yes
    b. No
    c. Don't know
    d. Prefer not to answer
19. When you are creating a communications plan, where do your objectives come from? Select all that apply.
    a. Tied to business objectives
    b. Based on executive expectations
    c. Based on research
    d. Gut instinct about goals of campaign
    e. Don't know
    f. Prefer not to answer
    g. Other <free text>
20. Share an objective from a recent communications plan.
21. Thinking about recent communications plans, what were your objectives focused on? Select all that apply.
    a. Advertising value equivalency (AVE)
    b. Attitude/behaviour change
    c. Awareness
    d. Donations
    e. Event attendance
    f. Media sentiment
    g. Media stories/reach
    h. Message pull-through

i. Newsletter opens/clicks
j. Net promoter score (NPS)
k. Pitches sent/replied to
l. Reputation change
m. Return on investment (ROI)
n. Sales/pipeline/revenue
o. Share of voice
p. Social media engagement
q. Social media impressions
r. Website traffic
s. Don’t know
t. Prefer not to answer
u. Other <free text>

22. Thinking about recent communications plans, how often were your objectives measurable (i.e., tied to specific numbers – increase social impressions from X to X or by X%, etc.)?
    a. Never
    b. Sometimes
    c. About half the time
    d. Most of the time
    e. Always
    f. Don’t know
    g. Prefer not to answer

M&E questions

23. Do you measure and evaluate your communications efforts?
    a. Yes
    b. No

c. Don’t know

d. Prefer not to answer

24. At what points in your campaigns do you engage in evaluation? Select all that apply.

**Question only viewable to those who answered “yes” to Q23*

a. Before the campaign begins

b. During the campaign

c. Once the campaign is complete

d. Don’t know

e. Prefer not to answer

f. Other <free text>

25. What impact does measurement have on your work? Select all that apply.

**Question only viewable to those who answered “yes” to Q23*

a. Allows you to adjust your strategy during the campaign

b. Allows you to report to your boss/others about the impact of your work

c. Gives insight to create better tactics

d. Helps improve your credibility in the organization

e. Provides insight as to whether objectives were achieved

f. Provides lessons to make future campaigns better

g. Don’t know

h. Prefer not to answer

i. Other <free text>

26. Why not? Select all that apply.

**Question only viewable to those who answered “no” to Q23*

a. Don’t have budget for it

b. Don’t have the right tools

c. Don’t have time

   d. Don't know how
   e. Don't trust results
   f. Don't want to set expectations
   g. There's no expectation for it to happen
   h. Too difficult
   i. We measure sometimes, just inconsistently
   j. Don't know
   k. Prefer not to answer
   l. Other <free text>

27. Do you evaluate the impact your work has on helping the organization avoid negative things like bad publicity, boycotts, lawsuits, etc.?
    a. Yes
    b. No
    c. Don't know
    d. Prefer not to answer
28. How do you evaluate the impact your work has on helping the organization avoid negative things like bad publicity, boycotts, lawsuits, strikes, etc.?

    **Question only viewable to those who answered "yes" to Q27*

    a. <free text>
29. Based on the use of measurable objectives, how effective do you think your communications efforts are?
    a. Extremely effective
    b. Very effective
    c. Moderately effective
    d. Slightly effective
    e. Not at all effective

   f. We don’t use measurable communications objectives
   g. Don’t know
   h. Prefer not to answer

30. Please explain/expand on your answer to the previous question
   a. <free text>

Support question

31. What kind of resources/support would help you implement better measurement and evaluation practices? Select all that apply.
   a. Access to measurement and evaluation tools (i.e., Meltwater, Cision, etc.)
   b. A dedicated person on the team
   c. A guide/framework for how to measure and evaluate your work
   d. More money for measurement and evaluation
   e. Don’t know
   f. Prefer not to answer
   g. Other <free text>

End of survey message

Thank you for completing this survey!

Appendix E: Interview Letter of Information/Consent

How and to what extent can communicators better measure the impact of their efforts?

Student Investigator:

Amber Daugherty

Department of Communication Studies

and Media Arts

McMaster University

Hamilton, Ontario, Canada

647-385-8963

Email: daughera@mcmaster.ca

Faculty Supervisor:

Dr. Terry Flynn

Department of Communication Studies

and Media Arts

McMaster University

Hamilton, Ontario, Canada

(905) 525-9140 ext. 26977

Email: tflynn@mcmaster.ca

Purpose of the study

You are invited to take part in this study on how communicators can better measure and evaluate the impact of their efforts. This research aims to understand the current state of measurement and evaluation by Canadian communicators and recommendations for better practices from communications experts and thought leaders. These findings will support the creation of a practical model or framework to better help organizations measure and evaluate their work with a specific focus on those with limited budgets, resources and/or capacity.

I am doing this research for a capstone project under the supervision of Dr. Terry Flynn.

Procedures involved in the research

You will be asked to participate in an online interview via Zoom that will be approximately one hour in length. During this interview, you will be asked questions about your communications/public relations practices, specifically how you understand and communicate with your audiences, set objectives and measure and evaluate your work. I will ask a few questions about your career to date including your title and how long you have worked in this field. With your permission, the interview will be recorded for transcription and analysis purposes. If at any point you would not like to answer a question, you will not be pressed to speak further on it. Your information will be protected; it will not be shared with anyone and the final report will only include anonymized information.

Potential harms, risks or discomforts

The risks involved in participating in this study are minimal. You do not need to answer questions that you do not want to answer or that make you feel uncomfortable. I describe below the steps I am taking to protect your privacy.

There is a small chance that, based on the information and quotes included in the final paper, you could be identified based on the details included in your answers. To minimize these risks, I will make every possible effort to remove specific references to organizational functions and history that would make you identifiable.

Potential benefits

The research will not benefit you directly. I hope to learn more about how communicators can better measure and evaluate the impact of their efforts. This could help the communications/public relations profession better demonstrate its value.

Confidentiality

To protect your privacy, I will send you a secure link via email to the Zoom meeting. There will be a waiting room to prevent unauthorized guests from joining. Once the interview is complete, the Zoom recording will be saved to McMaster's Zoom site. I will download it to my password-protected computer and then delete it from McMaster's Zoom site. I will then transcribe the interview and delete the recording file. I will be the only one who has access to these files.

Your information will be anonymized using de-identified descriptors (i.e., Communications Expert #1) that I will record in an additional document. Any quotes you provide will be anonymized and attributed to the de-identified descriptors. Through the combination of variables (i.e., your title, the sector you work in), it may be possible to identify some participants. To minimize this risk, I will make every possible effort to remove specific references to organizational functions and history that would make you identifiable.

Information/data gathered in this study will be kept for one year after the survey is complete, in the case of unanticipated follow up or there is a need to contact you. After this time, I will delete and/or shred all files.

Participation and withdrawal

Your participation in this study is voluntary. If you decide to be part of the study, you can withdraw from the study for whatever reason, even after giving consent, part-way through the interview or up until December 15, 2023 when I expect to be submitting my capstone. To withdraw, simply email or call me and ask to have your information removed from the study. If you decide to withdraw, there will be no consequences to you. In cases of withdrawal, any data you have provided will be destroyed unless you indicate otherwise. If you do not want to answer some of the questions you do not have to, but you can still be in the study.

Information about the study results

I expect to have this study completed by January 2024. If you would like a brief summary of the results, please let me know how you would like it sent to you.

Questions about the study: If you have questions or need more information about the study itself, please contact me at:

Amber Daugherty

daughera@mcmaster.ca

647-385-8963

This study has been reviewed by the McMaster Research Ethics Board and received ethics clearance under project #6630. If you have concerns or questions about your rights as a participant or about the way the study is conducted, please contact:

McMaster Research Ethics Office

Telephone: (905) 525-9140 ext. 23142

mreb@mcmaster.ca

Appendix F: Interview questions

Thought leaders

Introduction

You have had the opportunity to read the letter of information for this research study and understand that your participation is completely voluntary and you are free to end this interview at any time. All your information will be kept confidential. With your permission, I would like to record our interview, as it will allow me to listen more attentively to our discussion. Following our interview, I will transcribe our discussion. Once my research study has been completed, both the audio files and transcripts will be securely erased.

Do you agree to participate in this study?

- Do you have any questions before we begin?
- Do you agree to audio and video recording?
- Would you like a brief summary of the study results when they are available?
    - If yes, where should I send them?

M&E questions

1. Why, from your perspective, are measurement and evaluation critical to effective public relations?
2. What are the top reasons you've seen that M&E are not done effectively by PR practitioners?
3. How can practitioners not currently measuring or evaluating their efforts start doing it – specifically in low- or no-cost ways?
4. How can communicators measure avoidance (i.e., of bad publicity, boycotts, lawsuits, etc.)?
5. Where do you see the future of M&E?

Audience questions

6. What is your top tip for finding the needs, desires and other information about audiences relevant to effective public relations?

Objectives questions

7. What is your recommendation for effective environmental scanning?
8. What is your advice for setting measurable objectives?

Additional information question

9. Is there anything else I have not asked you about you would like to share?

Additional interviewees question

10. Do you have recommendations for other communications experts or thought leaders I should reach out to for this research study who have publicly available contact information?

Conclusion

Thank you for taking the time to speak to me today and for participating in this capstone research study. Please do not hesitate to contact me if you wish to add anything else that comes to mind. Likewise, may I contact you if I have any follow-up questions regarding our discussion?

C-suite communicators

Introduction

You have had the opportunity to read the letter of information for this research study and understand that your participation is completely voluntary and you are free to end this interview at any time. All your information will be kept confidential. With your permission, I would like to record our interview, as it will allow me to listen more attentively to our discussion. Following our interview, I will transcribe our discussion. Once my research study has been completed, both the audio files and transcripts will be securely erased.

Do you agree to participate in this study?

- Do you agree to audio and video recording?
- Do you have any questions before we begin?
- Would you like a brief summary of the study results when they are available?
    - If yes, where should I send them?

Demographic questions

1. What is your title?

2. How long have you worked in communications?
3. What is your communications' team's annual measurement and evaluation budget?

Audience questions

4. What is your current practice for understanding your audiences including their demographics, psychographics, media consumption, etc. as well as their needs, desires and other relevant information?
    a. How do you engage in dialogue with your audiences? (How do you listen to them?)

Objective questions

5. What is your current approach to environmental scanning?
6. How do the insights you gather from data influence action?
7. What is your current approach to setting SMART objectives that can be measured?
    a. When you set objectives, do you think about them in terms of outputs, outtakes, outcomes and impact?

M&E questions

8. How do you measure and evaluate your work?
9. Effective PR has been said to help reduce the risk of things like bad publicity, boycotts, lawsuits, etc. To what extent do you evaluate how the work you do helps the organization avoid these?
10. What, if any, issues have you experienced related to effectively measuring and evaluating your work?
11. Describe your typical process for post-campaign evaluation/reflection.
    a. How do you report the impact of your work and to who?
    b. How do learnings get incorporated into future campaigns/work?
12. Provide an example of a project you've worked on where you were able to effectively measure the outcome or impact of your work related to attitude and/or behaviour change.
13. How can practitioners not currently measuring or evaluating their efforts start doing it – specifically in low- or no-cost ways?

14. Where do you see the future of M&E?

Additional information question

15. Is there anything else I have not asked you about you would like to share?

Additional interviewees question

16. Do you have recommendations for other C-suite communicators I should reach out to for this research study?

Conclusion

Thank you for taking the time to speak to me today and for participating in this capstone research study. Please do not hesitate to contact me if you wish to add anything else that comes to mind. Likewise, may I contact you if I have any follow-up questions regarding our discussion?