

# **The evolution of evaluation – the accelerating march towards the measurement of public relations effectiveness**

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## **Introduction**

Public relations measurement and evaluation has long been a major practice subject. From the late 1970s onwards it has been identified as an important issue for research and practice implementation (McElreath, 1980, 1989; Synnott and McKie, 1997, Watson and Noble 2007; Watson 2008). The evolution of public relations measurement starts much earlier, with some suggesting that media monitoring practices can be identified from the late 18<sup>th</sup> century onwards (Lamme and Miller, 2010). It is, however, from the beginning of the 20<sup>th</sup> century, when ‘public relations’ began to be widely used as the description for a set of communication activities, that measurement practices can be identified. This paper traces that development which parallels public relations’ holistic beginnings through to its transformation into a communication practice which has strong publicity influences. Along the way, there has been the worldwide expansion of public relations practices, services and education; the growth of measurement and evaluation services; and the influence of academic thinking.

The paper uses a timeline narrative to describe and discuss the evolution of public relations measurement and evaluation over more than a century. In many ways this evolution has similarities to the development of public relations as an emerging and then extensive communications practice. Like public relations, it starts with elements of both social science research, especially opinion polling, which was used in planning of activities and of a

practice emphasis on publicity through media channels. By mid-20<sup>th</sup> century, the emphasis had moved more towards a publicity-led practice. Media analytics became far more important than social science methods. However, by the beginning of the 21<sup>st</sup> century, the balance was moving back towards greater sophistication in measurement and the wider alignment of public relations communication objectives with organisational objectives, especially in corporate public relations where new techniques such as scorecards (Zerfass, 2005) are being used. Ironically, this area of public relations is adopting whole-of-organisation (holistic) approaches to organisational communication similar to those promoted in the 1920s and 1930s.

### **The beginnings**

The timeline starts before the term, public relations, came into use. Lamme and Russell's monograph, *Removing the Spin: Towards a new theory of public relations history* (2010) argues that from George Washington onwards, US presidents monitored newspapers in order to gain intelligence on what was being said about them and the views of fellow citizens. In the 19<sup>th</sup> century, many industries and groups also tracked media coverage and public opinion. They ranged from railroads to temperance societies and evangelists. In the US and UK, news cuttings agencies were established in the latter part of the century. From some of these, we can see lineage to today's international computer-based evaluation companies.

At the end of the 19<sup>th</sup> century, the focus of public relations-type activity was on press agency and publicity (Cutlip 1994). Amongst the early so-called 'great men' of public relations in the US was Ivy L. Lee who formed the first professional public relations advisory firm, Lee and Ross. Lee changed from being the advisor to railway baron John D. Rockefeller, infamous for his anti-union activities, to a spokesman for the importance of recognising public opinion. He also, according to his biographer Ray E. Hiebert, considered

that his activity was nondefinable and nonmeasurable. It existed only through him and was thus not comparable (Hiebert, 1966).

Another ‘great man’ was Edward L. Bernays, whose importance came later in life as he was considered controversial and a self-publicist by many contemporaries in the first 30 years of his career (Ewen, 1996; Tye, 1998). He presented public relations as an applied social science to be planned through opinion research and “evaluated with precision”. Ironically, there is very little discussion of evaluation in Bernays’ books and papers. His first book, *Crystallizing Public Opinion* in 1923, set the foundations for a systematic approach to public relations (Pavlik, 1987). Contemporaries were often critical of Bernays but his views on public relations as a planned communication practice had a strong influence on later US practitioners from the 1950 onwards, notably the 1955 edited book, *The Engineering of Consent*. Apart from Bernays’ often-overlooked wife Doris Fleischmann, there were no ‘Great Women’ in public relations and she was not given equal recognition despite being a formidable advisor. Indeed, texts for the first 50 or 60 years of last century only write of ‘PR men’.

In the 1920s, the journalist and commentator Walter Lippmann’s book *Public Opinion* had a major influence on all forms of communication. He identified the role of public opinion in legitimising governments and organisations. This was taken up by the nascent public relations sector and Arthur Page, in particular, adopted opinion research to benchmark public and consumer attitudes for AT&T, which led to a consistently strategic approach to all forms of communications in this telecommunications giant. Page created a “public relations laboratory where PR successes and failures were gathered, studied and the lessons learnt passed on to his colleagues at AT&T” (Broom and Dozier, 1990, p. xi). This approach continued after his retirement in 1947 until the telephone monopoly was broken up in the late 1970s. It is notable, however, that AT&T was not measuring the results of communication

activity (outcomes) (Tedlow, 1979). The prevailing view in the US from the 1920s to late 1940s was that if the planning, based on sound opinion research was correctly done, then results would follow. In 1937, *Public Opinion Quarterly*, the first academic journal that touched on public relations was published, and in its pages early academic papers and professional discussions on public relations can be found. Edward Bernays' article, 'Recent trends in public relation activities' in its initial edition is considered to be the first article about research in the field (Pavlik 1987).

### **1930s and 1940s**

By the late 1930s, a wide range of measurement and evaluation methods were being used in the United States, notably by various levels of government. Brandon Batchelor, writing in 1938, gave two examples of the monitoring and interpretation of media publicity.

The Roosevelt Administration gives close attention not merely to the technique of publicity dissemination but also to the manner of its reception. In other words, it watches carefully all changes in the political attitudes of a community. The sum of these numerous local impressions constitutes, of course, a barometer of national opinion that possesses great value. (p. 212) [The method of data collection is not identified by Batchelor]

He also discussed Toledo Associates, which was a "cooperative publicity effort, sponsored by local business interests" set up to promote the city of Toledo, Ohio during the Great Depression.

Toledo's experiment in cooperative industrial publicity became an unqualified success. Ninety-one per cent of more than 72,000 clippings, representing newspaper circulations totalling more than one and half millions, were regarded as favourable to the city's interests (p. 214).

So it can be seen that at high level, measurement and evaluation was taking place using methods that are still in place today.

Although publicity had always continued as a practice, it was seen as a delivery subset of public relations. The mid-century view, expressed by Griswold and Griswold (1948), was that public relations was a management function to create relationships and “earn public understanding and acceptance” (p. 4). Plackard and Blackmon (1947) separated public relations as “the administrative philosophy of an organisation” which “stems from corporate character and over-all operations” from publicity which was “the art of influencing opinion by special preparation and dissemination of news” (p. 14). Communication or publicity were thus delivery and dialogue processes but not public relations itself. That view changed quickly as consumer products were developed and notions of corporate and product brands grew. Public relations lost that holistic concept and became typified by publicity practices. L’Etang (2004), writing about the 1960s, summarised the changed situation as: “business managers saw public relations as a cheap way of getting media coverage in comparison with advertising.” The impact on public relations measurement and evaluation was a move away from the social science-led emphasis on public opinion research to a more pragmatic analysis of media coverage, which was to dominate the second half of the 20<sup>th</sup> century.

From early times, PR practitioners and organisations had monitored press coverage of their and others activities. In 1942, Harlow wrote that public relations practitioners and their employers “should not be impressed by sheaves of press clippings” (p. 43) as a volume indicator of what was going on. Most books on public relations across the initial 40-50 year period discussed measurement of the volume of coverage, its length in column inches and whether it was positive or negative. The creation of the clippings or cuttings book became an art form with thick card paper on which clippings were mounted. Plackard and Blackmon gave this advice in 1947: “The publicist must learn the art of “pepping up” publicity results. Publicity clippings as such are not sufficiently interesting to show to a client. However, they can be dressed up or dramatized in unusual ways” (p. 299). Examples given included “trick

photography” by blowing cuttings up and then printing large sheets of folded card on which they were placed; graphic presentation of cuttings beneath newspaper mastheads; and displays on large display boards, especially in hall corridors to emphasise the volume.

### **The UK**

Public relations by mid-century was well-established in the United States, but in the UK, it was a post-World War 2 phenomenon. The first press agency, Editorial Services, had been set up by Basil Clarke in London in 1924 (L’Etang 2004) but the establishment and real growth of public relations came as a result of journalists and propaganda experts coming out of government and the armed forces in 1945 with knowledge of news management and propaganda methods. The Institute of Public Relations (IPR) was set up in 1948, mainly by governmental communicators in information officer posts as the first step to professionalise their area of activity (ibid.). The first IPR conference was in 1949 and the first British book, a ‘how-to’ guide entitled *Public relations and publicity* by J.H. Brebner, appeared in the same year.

From its outset, issues of evaluating public relations were discussed in the IPR’s *Journal*: mostly as methods of collation of cuttings and transcripts, and how to do it cheaply (J. L’Etang, personal communication, January 10, 2011). Unlike the US with its interest in social sciences and university education, there was a strong anti-intellectual streak in the IPR. This was expressed by its 1950 President Alan Hess who inveighed against “a tendency for too much intellectualisation and too much market research mumbo-jumbo” (L’Etang, 2004, p. 75). The IPR was not to produce its own book on PR until 1958 and training support for members was slow to start.

## **Evaluation scholarship**

The first edition of Scott Cutlip and Alan Center's long standing and still published PR text, *Effective Public Relations*, addresses measurement and evaluation mainly through the routes of public opinion research. Some commentators (notably Lindenmann, 2005) consider that the first edition of 1952 was the first scholarly book to mention the measurement and evaluation of public relations programmes. In later editions, they introduced their PII (Preparation, Implementation, Impact) model of planning and measuring PR programmes. It was the most widely taught process model until the late 1990s.

Analysis of the 'program research and evaluation' sub-section of Cutlip's bibliography of public relations research shows that of the 159 articles listed from 1939 to the early 1960s, the largest group (67) were concerned with opinion research, including employee studies (Cutlip, 1965). This was followed by a cluster of papers with topics such as public relations, promotional activity (including advertising), publicity research and measurement (31) and research methods and surveys (28). Media measurement (including press, film, TV, radio and mass media in general), which was soon to become the dominant area of public relations measurement and evaluation, had only produced 15 papers in a quarter of a century. Within the range of papers, there was little discussion of the methodology of measuring public relations activity or programmes, with the main emphasis on objective setting based on opinion research. Cutlip's summaries did not offer any references to specific methodology, other than one example of a rating system. The bibliography thus demonstrates the change in the practices of public relations and its measurement at the period of change from the social science-led approach to planning to the publicity-led communications that have been identified by L'Etang (2004) and others.

### **But it's very difficult**

Despite the emphasis placed on measurement by the IPR in the UK and leading US texts, many pre-1980 texts reveal great reluctance by practitioners to evaluate the outcomes of their activity. Although Bernays' view was that public relations practice was an “applied social science” (Hiebert, 1988, p.265), it is hard to disagree with James Grunig's comment in 1983 that this was an inaccurate statement. Practitioners, he said, are "not scientists at all although they should (but few do) use theories and research on public relations and communications” (p. 28). To illustrate the reluctance of the times, here are some statements drawn from the literature ranging from the 1930 to the mid-1960s. Some say, like Ivy Lee, that PR can't be measured whilst others like Marston, whose textbook was widely used, say they can't be bothered.

“The counselor works to better a firm's reputation, but the improvement can rarely be satisfactorily measured” (Tedlow 1979, p. 160 writing about 1930s and 1940s).

“Few practitioners will claim they can prove their efforts have paid off for their clients or companies” (Finn, 1960, p. 130).

“Most public relations men, faced with the difficulty and cost of evaluation, forget it and get on with the next job” (Marston 1963, p. 176).

“Measuring public relations effectiveness is only slightly easier than measuring a gaseous body with a rubber band” (Burns W. Roper, cited in Marston 1963, p 289).

In the UK, views were very similar. The first is from James Derriman, later a president of the IPR in 1973-74. Two others come from the most prolific British writers of PR texts – Frank Jefkins and Sam Black, the latter becoming an honorary professor at Stirling for his role in establishing its MSc in Public Relations.

“It is often hard to assess (achievement of objectives) with precision or identify effects of public relations” (Derriman 1964, p. 198).

““Results” is something of a dirty word in PR” (Jefkins, 1969. p.219).

“The results of public relations activity are very difficult to measure quantitatively ... it may be uneconomic to devote too much time and too many resources” (Black, 1971, p. 98).

The reluctance to evaluate was a feature of studies of public relations practice over coming decades. Watson (1994) found similar attitudes in a large-scale study of UK practitioners which included comments such as: “PR is not a science; most practitioners are inadequate; clients are too thick,” and “the best evaluation of results is when the client is pleased, satisfied, happy and renews the contract. All else is meaningless” (Appendix 2). Although practitioners expressed the desire to evaluate, the reality was that they lacked the knowledge, time and budget to undertake the task, much like their predecessors 30 years earlier.

### **1950s and 1960s**

The Institute of Public Relations published its first book – *A guide to the practice of public relations* in 1958. Although it stated that public relations is “an essential part of management” (p. 17), the book was mostly concerned with craft aspects such as writing, media relations, event creation and management. It gave one short paragraph to monitoring press enquiries and handed the chapter on market research to a non-PR market research specialist. In a slightly later book, then IPR President Alan Eden-Green, writing the foreword in Ellis and Bowman’s *Handbook of Public Relations* in 1963, posits PR as being “primarily concerned with communication” (Ellis & Bowman, 1963, foreword). Other texts at the time also focus on processes, but not planning, measurement or outcomes.

In Germany, Albert Oeckl in 1964 was proposing three methods of research – publics and how they use media, content analysis and research on media effects. He was much more linked to the Bernaysian social science of PR than were UK practitioners.

However, beyond texts and articles, Advertising Value Equivalents (AVE) was used to put a value on media coverage, which emphasised the craft nature of PR. The first warning against AVE came in a 1949 edition of the *IPR Journal* (J. L'Etang, personal communication, January 10, 2011). Plackard and Blackmon (1947) also refer to it in the US, with both indicating that it was an established practice by mid-century. It didn't, however, surface in professional or quasi-academic literature till the late 1960s.

### **Increasing discussion**

The late 1960s and the 1970s were periods when books and articles addressing public relations evaluation started to appear. *Measuring and Evaluating Public Relations Activities* was published by the American Management Association in 1968. It had seven articles on methods of measuring public relations results. It is notable that it came from the American Management Association, and not a public relations professional body. Soon after, Robinson's *Public Relations and Survey Research* (1969) was published. Pavlik says that "(Robinson) predicted that PR evaluation would move away from seat-of-the-pants approaches and toward "scientific derived knowledge" (1987, p. 66). He added that Robinson was suggesting practitioners would no longer rely on anecdotal, subjective measures of success, such as feedback from personal contacts or winning awards; they "would begin to use more systematic measures of success, primarily social science methods such as survey research" (ibid.). Academics then began taking the lead. A conference in 1977 at the University of Maryland chaired by James Grunig, partnering with AT&T, was followed by the first scholarly special issue, 'Measuring the Effectiveness of Public Relations,' in *Public Relations Review*'s Winter 1977 edition, which featured papers from the conference.

## **Rise of PR service industries**

US industry veteran Mark Weiner has recently commented (M. Weiner, personal communication, February 16, 2011) that a key reason for the introduction of measurement services was that industry growth in the 1960s and 1970s could support it. By then, the US public relations consultancy networks pioneered by John Hill of Hill & Knowlton (Miller 1999) and Harold Burson of Burson-Marsteller were widening their spread of offices and services to work for US-owned multi-nationals. They needed world-wide monitoring and management systems that gave systematic data back to HQs. Consumer public relations rapidly developed in the 1950s and 60s in the post war economic boom, aided by the widespread access to television which had also fostered advertising's expansion. University studies which had started in the US in the 1940s, although Edward Bernays claims to have taught the first public relations class at New York University in 1923 (Bernays, 1952) were growing in North America and other countries. These developments led to the emergence of the service industries, especially in the measurement of PR activity. One of the first evaluators was PR Data, which was formed from an internal General Electric operation by Jack Schoonover and the first to use computer based analysis – using punch-cards and simple programmes (Tirone, 1977). It was soon followed by other providers, mainly press cuttings agencies who became evaluators. The UK development in this field did not, however, come for another 20 years.

## **1980s – Academic input**

Following on from the initial conference and academic journal discussion late in the previous decade, US journals came alive in the 1980s with papers from leading academics such as Glenn Broom, David Dozier, James Grunig, Douglas Newsom and Donald Wright. From the

consultancy side, Lloyd Kirban of Burson Marsteller and Walter Lindenmann of Ketchum were prolific and drove the subject higher on the practitioner agenda, whilst from the media analysis side, Katie Delahaye Paine announced her first publicity measurement system in 1987 and went on to establish the Delahaye measurement business. In the UK, White (1990) undertook the first study of practitioner attitudes amongst member consultancies of the Public Relations Consultants Association (PRCA) and offered recommendations on 'best practice'. In 1990 *Public Relations Review* had a seminal special edition on evaluation, 'Using Research to Plan and Evaluate Public Relations' (Summer 1990). Widely cited, it showed that measurement and evaluation were consistently part of academic and professional discourse. All these authors emphasised the need for public relations to be researched, planned and evaluated using robust social science techniques, particularly Broom and Dozier's *Research Methods in Public Relations* (1990).

### **1990s – Pace increases**

As the 1990s proceeded, evaluation became a major professional and practice issue that was addressed by research and education activity in many countries which produced books, methods of analysis and proliferating international initiatives. In the US, the Institute for Public relations Research and Education (now the Institute for Public Relations, IPR), harnessing Walter Lindenmann's enthusiasm, published research and commentaries on establishing objectives and assessing results. The International Public Relations Association (IPRA) published its Gold Paper No.11: *Public Relations Evaluation: Professional Accountability*. In Europe, the German public relations association and the International Communications Consultants Organisation (ICCO) held a pan-European summit on evaluation in 1996, while the Swedish PR body, Svenska Informationsforening, moved ahead

of the debate at the time to report on Return on Communication, a form of Return on Investment that considered the creation of non-financial value through communications.

The 1990s was also a decade when Quality Assurance (QA) approaches to production and BS5750 or ISO9000 became part of management language and discourse. Companies with QA certification wanted their suppliers, including public relations advisers, to also have the same standards of operation. The first UK consultancy to gain BS5750 was Countrywide Communications (now Porter Novelli) in 1993 (P. Hehir, personal communication, April 9, 2011), but other consultancies were slow to follow as the new QA standards were prepared for production-oriented businesses, rather than service industries like consultancy. To promote the discussion, a spin-off from the IPRA, the International Institute for Quality in Public Relations (IQPR) was formed and prepared the Quality in Public Relations paper. It included a section on measurement and evaluation as integral to the management of a public relations operation. By the end of the decade, the PRCA developed the Consultancy Management Standard (CMS) with the assistance of a leading international QA certification body. This took the place of BS5750/ISO9000 as it had been prepared with the aim of improving the management and operations of consultancies, a different emphasis to the early QA certifications. It included an assessable commitment to the systematic use of measurement of programmes, thus embedding practices within the consultancy sector. CMS has been adopted world-wide by industry organisations.

The late 1990s also saw the launch of large national campaigns to promote best practice in measurement and evaluation. Lindenmann's paper on public relations measurement was widely used in the US. It established the terminology of three stages of evaluation – Output, Out-take and Outcome - that are almost universally used (Lindenmann 2005). The public relations consultancy bodies, PRCA in the UK and ICCO, its international offshoot, published their own booklets and were followed by other industry bodies separately

or cooperatively. The major initiative in the UK was *PRE-fix*, a partnership between PRCA and IPR (UK) with *PR Week*, the weekly trade magazine. It ran for three years and was accompanied by seminars, research, online resources and best practice case studies. AMEC, then the Association of Media Evaluation Companies, was formed as a UK trade body. It is now the International Association for Measurement and Evaluation of Communications with members in 38 countries, which also indicates the expansion of the measurement and media analysis service industry. In the US, the IPRRE formed the Commission on Public Relations Measurement and Evaluation in 1999, which plays a major role in undertaking practice based research and disseminating it.

### **New century**

In the first decade of the 21<sup>st</sup> century, other influences came upon PR planning, research and evaluation. Kaplan and Norton's business book, *The Balanced Scorecard* (1996) which proposed greater integration between organisational functions and sharing of Key Performance Indicators (KPI) had an influence on corporate communications. Approaches based on scorecards (Zerfass 2005) have moved the emphasis of evaluation of corporate communication away from the effects of media towards the development of communication strategies more closely related to organisational objectives where KPIs are measured, rather than outputs from communication activity. There were further industry educational initiatives in the UK with the CIPR preparing a version of its previous document that targeted Media Evaluation. The service business of media measurement and PR effectiveness evaluation grew rapidly, mainly with corporate clients.

The first decade ended with the adoption of The Barcelona Declaration of Measurement Principles at the European Measurement Summit in June 2010 (AMEC, 2010). This statement of seven principles of measurement of public relations activity favours

measurement of outcomes, rather than media results, and the measurement of business results and of social media, but rejects AVEs as failing to indicate the value of public relations activity. It was a benchmark of basic measurement and evaluation practices and an attempt by the measurement service industry to define tenets of media analysis before addressing the challenges of both social media with its emphasis on 'conversation'. The Barcelona Declaration demonstrates that PR measurement and evaluation is big service business and a long way from the cuttings agencies of 50 to 100 years ago.

### **Conclusion**

The journey of public relations evaluation has circularity with the Barcelona Declaration, which benchmarks the importance of setting objectives and measuring outcomes, thus offering similar thinking to that of Lee and, in particular, Bernays in the 1920s. During the more than 100 years outlined in this paper, the fascination of practitioners with media relations strategies and tactics has remained consistently prominent. Methods described by Batchelor (1938) and Harlow (1942), such as frequency, reach, and tonality of media references are widely-demanded practices in measurement and evaluation, although social media brings new challenges for practitioners and the measurement services sector. However, academic discussion of measurement and evaluation took more than 70 years to gain traction, with the 1970s being the starting point. By 1990 the range of methods for research into the effectiveness of public relations has been well-established and excellently presented in Broom and Dozier's seminal text (1990). Yet despite extensive discussion in academic journals and books (Broom and Dozier, 1990; Stacks, 2002; Watson and Noble, 2007), no applied theory of public relations measurement and evaluation has been developed. Methods have been adapted from social sciences and market research, but no theory proposed.

Practitioners have also shown reluctance to adopt proven methods. As Watson (1994) and Wright et al. (2009), amongst other researchers, have found, practitioners still talk more about evaluation than actually practice it. Gregory's 2001 article, "Public relations and evaluation: does the reality match the rhetoric?" is an appropriate rhetorical question and summary of the situation after a century of public relations practice. Perhaps this signifies an immature profession, which is unconfident in its practices. One example is the widespread use of AVE, which has been condemned as invalid since the late 1940s and is damned by the Barcelona Declaration of 2010. Yet it was found to be in use by more than 40% of respondents in an international survey in 2009 (Wright et al., 2009). The evolution of AVE and its beginnings (some time before 1947, when Plackard and Blackmon refer to it) is a subject for further research as this initial study has not identified the source(s).

The limitation of this paper, which uses a timeline narrative, is that it provides mainly description of a century of development within the length constraints of an academic paper. However, it sets out the story of the evolution of public relations measurement and evaluation which appears to parallel development of the main procedures and growth of public relations as an international communication practice. Now that the 'length' has been established, more research can be devoted to the 'width'. As well, the paper has focused on the United States and the United Kingdom with only passing a reference to Germany and none at all to other countries in which public relations started in the first half of the 20th century. Future research should also address these other nations and communication cultures.

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