

Barcelona Declaration of Measurement Principles:

**Validated Metrics
Social Media Measurement**

October 7, 2010

Global Alliance

ICCO

Institute for Public Relations

Public Relations Society of America

AMEC U.S. & Agency Leaders Chapter





Why Are We Here? For the Common Good of Our Industry.

- The communications landscape is changing rapidly
- A lack of clear standards and approaches to PR measurement results in the profession not always being taken seriously; it doesn't count unless you can count it
- AVEs, random use of multipliers, and other silly metrics and practices diminish the integrity of the profession and the market size
- As a profession, we spend more time arguing amongst ourselves rather than building the field
- We are at a moment in time to make difference, and alter the path we are on, taking advantage of the opportunity to “own” the new communications environment



To Be Successful

- The Standards will be business-focused as opposed to academic, highly theoretical, and grounded in real PR practice.
- This is the first time the PR industry will be able to hold its head high in terms of its professional standards, and practitioners using them should have a seat at the proverbial table.



Seven Principles Adopted on June 17, 2010

1. Importance of Goal Setting and Measurement
2. Measuring the Effect on Outcomes is Preferred to Measuring Outputs
3. The Effect on Business Results Can and Should Be Measured Where Possible
4. Media Measurement Requires Quantity and Quality
5. AVEs are not the Value of Public Relations
6. Social Media Can and Should be Measured
7. Transparency and Replicability are Paramount to Sound Measurement



Principle 1: Importance of Goal Setting and Measurement

- Goal-setting and measurement are fundamental aspects of any public relations program
- Goals should be as quantitative as possible and address who, what, when and how much the PR program is intended to affect
- Measurement should take a holistic approach, including representative traditional and social media; changes in awareness among key stakeholders, comprehension, attitude, and behavior as applicable; and effect on business results



Principle 2: Measuring the Effect on Outcomes is Preferred to Measuring Outputs

- Outcomes include shifts in awareness, comprehension, attitude and behavior related to purchase, donations, brand equity, corporate reputation, employee engagement, public policy, investment decisions, and other shifts in stakeholders regarding a company, NGO, government or entity, as well as the stakeholder's own beliefs and behaviors
- Practices for measuring the effect on outcomes should be tailored to the business objectives of the PR activities. Quantitative measures such as benchmark and tracking surveys, are often preferable. However, qualitative methods can be well suited or used to supplement quantitative measures
- Standard best practices in survey research including sample design, question wording and order, and statistical analysis should be applied in total transparency



Principle 3: The Effect on Business Results Can and Should Be Measured Where Possible

•To measure business results from consumer or brand marketing, models that determine the effects of the quantity and quality of PR outputs on sales or other business metrics, while accounting for other variables, are a preferred choice. Related points are:

- ✓ Clients are creating demand for market mix models to evaluate the effect on consumer marketing
- ✓ The PR industry needs to understand the value and implications of market mix models for accurate evaluation of consumer marketing PR, in contrast to other measurement approaches
- ✓ The PR industry needs to develop PR measures that can provide reliable input into market mix models
- ✓ Survey research can also be used to isolate the change in purchasing, purchase preference or attitude shift resulting from exposure to PR initiatives



Principle 4: Media Measurement Requires Quantity and Quality

Overall clip counts and general impressions are usually meaningless. Instead, media measurement, whether in traditional or online channels, should account for:

- Impressions among the stakeholder or audience
- Quality of the media coverage including:
 - ✓ Tone
 - ✓ Credibility and Relevance of the Medium to the Stakeholder or Audience
 - ✓ Message Delivery
 - ✓ Inclusion of a 3rd party or company spokesperson
 - ✓ Prominence as Relevant to the Medium
- Quality can be negative, positive, or neutral



Principle 5: AVEs are Not the Value of Public Relations

- Advertising Value Equivalents (AVEs) do not measure the value of public relations and do not inform future activity; they measure the cost of media space and are rejected as a concept to value public relations
- Where a comparison has to be made between the cost of space from earned versus paid media, validated metrics should be used, stated for what they are, and reflect:
 - negotiated advertising rates relevant to the client, as available
 - quality of the coverage (see Principle 2), including negative results
 - physical space of the coverage, and the portion of the coverage that is relevant
- Multipliers intended to reflect a greater media cost for earned versus paid media should never be applied unless proven to exist in the specific case



Principle 6: Social Media Can and Should Be Measured

- Social media measurement is a discipline, not a tool; but there is no “single metric”
- Organizations need clearly defined goals and outcomes for social media
- Media content analysis should be supplemented by web and search analytics, sales and CRM data, survey data and other methods
- Evaluating quality and quantity is critical, just as it is with conventional media
- Measurement must focus on “conversation” and “communities” not just “coverage”
- Understanding reach and influence is important, but existing sources are not accessible, transparent or consistent enough to be reliable; experimentation and testing are key to success



Principle 7: Transparency and Replicability are Paramount to Sound Measurement

PR measurement should be done in a manner that is transparent and replicable for all steps in the process, including specifying:

Media Measurement:

- Source of the content (print, broadcast, internet, consumer generated media) along with criteria used for collection
- Analysis methodology – for example, whether human or automated, tone scale, reach to target, content analysis parameters

Surveys:

- Methodology –sampling frame and size, margin of error, probability or non-probability
- Questions – all should be released as asked (wording and order)
- Statistical methodology- how specific metrics are calculated



Next Steps

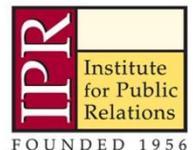
Two AMEC task forces were set-up to discuss “what’s next” toward more standardized measurements: one on ‘validated metrics’ and one on ‘social media metrics.’ The goals of these taskforces:

- How do we define ‘validated metrics’ in terms of initial replacements of AVEs, but to a broader resonance down the road.
- The focus is to deliver a practical Framework or Grid in which to display a variety of metrics that can be used for each type of organizational situation.
- Goal is to make sure everyone in the industry is on the same road, relegating ‘output metrics’ to their place in relating them to real business outcomes.
- Must be practical and flexible, not theoretical or academic

Barcelona Declaration of Measurement Principles

Validated Metrics Taskforce

Metrics Framework: Version 2



Brand / Product Marketing	Awareness	Knowledge	Interest	Intent / Support	Action
Public Relation Activity	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	
Intermediary Effect	<ul style="list-style-type: none"> • Impressions/ target audience impressions • Audience reach • Number of articles/ number of articles in target media • Video views • Frequency • Prominence 	<ul style="list-style-type: none"> • Key message alignment • Accuracy of facts 	<ul style="list-style-type: none"> • Key message alignment • Endorsement • Frequency of (positive) mentions • Media inquiries • Number of “Fans” • Links • Retweets 	<ul style="list-style-type: none"> • Endorsement 	
Target Audience Effect (Consumer / Customer)	<ul style="list-style-type: none"> • Unaided awareness • Aided awareness 	<ul style="list-style-type: none"> • Knowledge of product attributes and features 	<ul style="list-style-type: none"> • Relevance (to themselves) • Requests for information <ul style="list-style-type: none"> • Visitors to website • Calls • Event/meeting attendance 	<ul style="list-style-type: none"> • Attitude change • Stated intention • Requests for quote • Trial • Links to site 	<ul style="list-style-type: none"> • Sales • Market share • Cost savings • Leads generated

Reputation Building	Awareness	Knowledge	Interest	Intent / Support	Action
Public Relation Activity	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	
Intermediary Effect	<ul style="list-style-type: none"> • Impressions/ target audience impressions • Audience reach • Number of articles/ number of articles in target media • Video views • Frequency • Prominence 	<ul style="list-style-type: none"> • Key message alignment • Accuracy of facts 	<ul style="list-style-type: none"> • Key message alignment • Endorsement • Frequency of (positive) mentions • Media inquiries • Number of “Fans” • Links • Retweets 	<ul style="list-style-type: none"> • Endorsement 	
Target Audience Effect (Multiple Stakeholders)	<ul style="list-style-type: none"> • Unaided awareness • Aided awareness 	<ul style="list-style-type: none"> • Knowledge of company profile and offer 	<ul style="list-style-type: none"> • Relevance (to themselves) • Requests for information <ul style="list-style-type: none"> • Visitors to website • Calls • Event/meeting attendance 	<ul style="list-style-type: none"> • Attitude change • Uplift in reputation drivers • Links to site 	<ul style="list-style-type: none"> • Sales • Market share • Share price • Talent retention and recruitment

Issues Advocacy / Support	Awareness	Knowledge	Interest	Intent / Support	Action
Public Relation Activity	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	
Intermediary Effect	<ul style="list-style-type: none"> • Impressions/ target audience impressions • Audience reach • Number of articles/ number of articles in target media • Video views • Frequency • Prominence 	<ul style="list-style-type: none"> • Key message alignment • Accuracy of facts 	<ul style="list-style-type: none"> • Key message alignment • Endorsement • Frequency of (positive) mentions • Media inquiries • Number of “Fans” • Links • Retweets 	<ul style="list-style-type: none"> • Endorsement 	
Target Audience Effect (Public)	<ul style="list-style-type: none"> • Unaided awareness • Aided awareness 	<ul style="list-style-type: none"> • Knowledge of issue • Knowledge of client POV 	<ul style="list-style-type: none"> • Relevance (to themselves) • Requests for information <ul style="list-style-type: none"> • Visitors to website • Calls • Event/meeting attendance 	<ul style="list-style-type: none"> • Attitude change • Stated support • Links to site 	<ul style="list-style-type: none"> • Letters of support (to congressmen etc) • Registrations to join support group • Donations / sponsorship • Legislation passed/ blocked • Cost savings

Employee Engagement	Awareness	Knowledge	Interest	Intent / Support	Action
Public Relation Activity	<ul style="list-style-type: none"> • Internal newsletters • Intranet • Town halls / events • Social media outreach 	<ul style="list-style-type: none"> • Internal newsletters • Intranet • Town halls / events • Social media outreach 	<ul style="list-style-type: none"> • Internal newsletters • Intranet • Town halls / events • Social media outreach 	<ul style="list-style-type: none"> • Internal newsletters • Intranet • Town halls / events • Social media outreach 	
Intermediary Effect					
Target Audience Effect (Employees)	<ul style="list-style-type: none"> • % reading newsletters / visiting intranet 	<ul style="list-style-type: none"> • Knowledge of CEO vision • Knowledge of company strategy / values / policies 	<ul style="list-style-type: none"> • Requests for information <ul style="list-style-type: none"> • Visitors to intranet • Calls • Town hall / meeting attendance • Mentions in employee blogs 	<ul style="list-style-type: none"> • Attitude change • Endorsement • Participation in initiatives 	<ul style="list-style-type: none"> • Employee turnover • Employee productivity • Recruitment

Investor Relations	Awareness	Knowledge	Interest	Intent / Support	Action
Public Relation Activity	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	
Intermediary Effect	<ul style="list-style-type: none"> • Impressions/ target audience impressions • Audience reach • Number of articles/ number of articles in target media • Video views • Frequency • Prominence 	<ul style="list-style-type: none"> • Key message alignment • Accuracy of facts 	<ul style="list-style-type: none"> • Key message alignment • Endorsement • Frequency of (positive) mentions • Media inquiries • Number of “Fans” • Links • Retweets 	<ul style="list-style-type: none"> • Endorsement 	
Target Audience Effect (Financial Community)	<ul style="list-style-type: none"> • Unaided awareness • Aided awareness 	<ul style="list-style-type: none"> • Knowledge of company profile and offer 	<ul style="list-style-type: none"> • Requests for information <ul style="list-style-type: none"> • Visitors to website • Calls • Event/meeting attendance 	<ul style="list-style-type: none"> • Attitude change • Endorsement 	<ul style="list-style-type: none"> • Impact on share price • Impact on earnings multiple • Impact on earnings per share



Crisis and Issues Management	Awareness	Knowledge	Interest	Intent / Support	Action
Public Relation Activity	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	<ul style="list-style-type: none"> • Content creation • Traditional Media outreach • Social media outreach • Influencer outreach • Stakeholder outreach • Events/speeches 	
Intermediary Effect	Balanced (not total) coverage in: <ul style="list-style-type: none"> • Impressions/target audience impressions • Audience reach • Number of articles/number of articles in target media • Video views • Frequency • Prominence 	<ul style="list-style-type: none"> • Key message alignment • Accuracy of facts • Balanced coverage 	<ul style="list-style-type: none"> • Key message alignment • Endorsement • Frequency of (positive) mentions • Media inquiries • Number of “Fans” • Links • Retweets 	<ul style="list-style-type: none"> • Endorsement • Balanced coverage 	
Target Audience Effect (Multiple Stakeholders)	Increase or decrease (dependent on objective) in: <ul style="list-style-type: none"> • Unaided awareness • Aided awareness 	<ul style="list-style-type: none"> • Knowledge of facts of the situation • Knowledge of client POV 	<ul style="list-style-type: none"> • Relevance (to audience) • Requests for information <ul style="list-style-type: none"> • Visitors to website • Calls • Event/meeting attendance 	<ul style="list-style-type: none"> • Minimal attitude change (towards client's reputation) 	<ul style="list-style-type: none"> • Belief in the client's brand • Maintain share price /earnings multiple • Maintain market share / sales / customers

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Social Media Taskforce

Metrics Framework: Version 2





Prior Work: Barcelona Principle #6



Principle 6: Social Media Can and Should Be Measured

- Social media measurement is a discipline, not a tool; but there is no “single metric”
- Organizations need clearly defined goals and outcomes for social media
- Media content analysis should be supplemented by web and search analytics, sales and CRM data, survey data and other methods
- Evaluating quality and quantity is critical, just as it is with conventional media
- Measurement must focus on “conversation” and “communities” not just “coverage”
- Understanding reach and influence is important, but existing sources are not accessible, transparent or consistent enough to be reliable; experimentation and testing are key to success



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Recommendation #1. Focus on Outcomes

Need to define outcomes and goals in advance – getting on the social media bandwagon is good, but evaluation of success is ultimately tied to goals

1. PRSA “Business Outcomes” -- <http://comprehension.prsa.org/?p=628>
2. Altimeter “Social Marketing Analytics” -- <http://bit.ly/dldIHf>

Can't define or manage purely within PR/communications silos

Need to engage stakeholders across the organization

Need to define linkages with business process, marketing objectives, etc.

Need to integrate social media with other data (web analytics, search data, sales reports, surveys) to evaluate trends and correlate data for insight

Outcomes will likely span multiple business goals

Advocacy and relationships, not just product awareness and sales

Brand associations, brand preference, thought leadership, differentiation

“Voice of the customer” → customer retention, better products, etc.



Recommendation #2. Starter Set of KPIs

Basic quantitative data is easy to measure – useful but not terribly valuable

- # of blog/video/content posts, # of Facebook posts, # of tweets

- # of blog/video views, # of Facebook fans, # of Twitter followers

- # of comments, # of linkbacks, # of likes, # of retweets

- # of unique visits/visitors, X:XX time spent on site/content

Need to get into more quality and context, similar to media analysis

- % accuracy/consistency of messaging

- % favorable (positive, negative, neutral, mixed)

- % of endorsement/opinion/advocacy/call to action

- % of dislikes/badvocates

- % share of conversation (overall or by topic)

- Brand associations and differentiation

- Targeted stakeholders vs. broad audience

- Benchmarking over time and against competitors

Fits into “validated metrics” framework from post-AVE task force (see next slide)

Social/ Community Engagement	Awareness	Knowledge / Understanding	Interest / Consideration	Intent / Support / Preference	Action
Public Relations Activity	<ul style="list-style-type: none"> • # assets created • # blog posts • # videos/podcasts • # Facebook posts • # Twitter posts • # blogger events • # bloggers briefed • # community site posts and events • Offline community events/speeches 	<ul style="list-style-type: none"> • # assets created • # blog posts • # videos/podcasts • # Facebook posts • # Twitter posts • # blogger events • # bloggers briefed • # community site posts and events • Offline community events/speeches 	<ul style="list-style-type: none"> • # assets created • # blog posts • # videos/podcasts • # Facebook posts • # Twitter posts • # blogger events • # bloggers briefed • # community site posts and events • Offline community events/speeches 	<ul style="list-style-type: none"> • # assets created • # blog posts • # videos/podcasts • # Facebook posts • # Twitter posts • # blogger events • # bloggers briefed • # community site posts and events • Offline community events/speeches 	
Intermediary Effect	<ul style="list-style-type: none"> • Owned media site visitors per day • Earned media site visitors/day • Social network channel visitors • # video views • % share of conversation • Target reach by demographics • Prominence • Offline media impressions 	<ul style="list-style-type: none"> • X:XX time spent on site/channel • % share of conversation • Site surveys and feedback forms • Key message alignment • Expressed opinions • Accuracy of facts • Offline media impressions and messaging 	<ul style="list-style-type: none"> • X:XX time spent on site/channel • % share of conversation • Expressed opinions • # Facebook fans • # Twitter followers • # Retweets • # Comments • # Likes • # Linkbacks • Offline media inquiries 	<ul style="list-style-type: none"> • X:XX time spent on site/channel • Expressed recommendations • # Facebook fans • # Twitter followers • # Retweets • # Comments • # Likes • # Linkbacks • Offline media inquiries 	
Target Audience Effect (Consumer / Customer)	<ul style="list-style-type: none"> • Unaided awareness • Aided awareness 	<ul style="list-style-type: none"> • Knowledge of product attributes and features • Brand association & differentiation 	<ul style="list-style-type: none"> • Relevance (to themselves) • Requests for information • Event attendance • Advocacy 	<ul style="list-style-type: none"> • Attitude change • Brand preference • Stated intention • RFPs/RFQs • Product trials • Advocacy 	<ul style="list-style-type: none"> • Downloads • Leads/sales • Revenue • Market share • Cost savings • Advocacy



Recommendation #3. Influence Rating/Ranking

- “Influence” and “authority” are domain-dependent and often client-specific
 - Generic online “influence” ratings are inherently limited
 - Influencers should be identified and rated using custom criteria
 - Audience definition and demographics are critically important
- “Influence” and “popularity” aren’t the same
 - Can’t measure influence or authority strictly via linkbacks
 - HP Labs research**: less chatty people may be more influential
 - Influencing someone to buy vs. influencing a conversation
- Influence is multi-level, online and offline
 - Can’t measure influence or authority strictly via online conversation
 - Need multiple data sources to fully assess (web, surveys, CRM, call center)
- Influence can change over time based on commentary, behavior, audience
 - Similar to editorial credibility, online influence is a variable asset

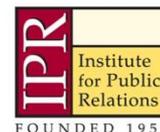
** HP Labs research sources:

<http://www.scribd.com/doc/35401457/Influence-and-Passivity-in-Social-Media-HP-Labs-Research>

<http://h30507.www3.hp.com/t5/Data-Central/What-makes-a-tweet-influential-New-HP-Labs-social-media-research/bc-p/81883#M20>



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Recommendation #4. Content Sourcing

Not all sources are created equal** – know what you’re getting / not getting

Ask: What content is included? Which channels? How deep?

Ask: Is the data captured and stored, or just streamed? If stored, how long?

Ask: Are multiple languages captured? Via native-language queries?

Ask: How is the data calculated? What are the formulas?

Garbage in, garbage out – critical challenges for analytics and measurement

Data quality and consistency issues are pervasive

Online content captures a lot from bots, spam blogs and aggregators

Need to filter, apply quality control, inspect sources to ensure good data

Data consistency over time – problems with vendors adding new sources

International variations – some tools good for U.S. but not deep elsewhere

Industry needs better transparency from vendors on content sourcing, quality

Some tools are better at “research and analytics” while others are designed for

“listening and engagement” tools – organizations may need separate toolsets

** Weaver Bimber paper comparing news story searches in Lexis Nexis and Google News:

<http://www.docstoc.com/docs/41212210/finding-news-stories-a-comparison-of-searches-using-lexisnexis-and-google-news>



Where Do We Go From Here?

1. September – AMEC taskforces shared recommendations with AMEC International Committee.
2. October 7 – Discussion at the Institute for Public Relations 8th North American Summit on Measurement . Draft recommendations presented; two week comment period begins. Post comments to IPR blog, AMEC and christina.darnowski@prsa.org
3. October 21 – comment period closes.
4. October 22-November 12 – consultation process with key organizations including CIPR, GA, PRCA, ICCO, PRSA, etc.
5. November 17 – presentation and discussion of final recommendations at AMEC/PRSA Workshop in London with participants from PRCA , IPR Commission and CIPR.