

Standardised measurement and evaluation
of public relations: normative guidelines for
implementing the Barcelona Principles in
South African practice

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PREFACE

The
dedication
of this work
is split
seven ways:
to Eduard,
to Elsje,
to Jan,
to Lina,
to Nalize,
to Suzette,
and to Rudolph,
who has
stuck
with me
until the
very
end.

To Prof Lynette Fourie, I would like to express my deepest gratitude for her kind and wise guidance – without her, this work would not have been possible.

Asking good questions may ease finding good answers, but never guarantees to actually finding them - Nechansky (2013)

ABSTRACT

Public relations (PR) measurement and evaluation has been an imperative for practitioners and academics for over 40 years. The publication of the Barcelona Declaration of Measurement Principles (the Barcelona Principles) was arguably one of the largest advancements toward a global standard for PR measurement and evaluation. However, these principles were drafted in accordance with global PR best practice, which raises the issue of localisation when applied in country-specific contexts. This study aims to investigate the implementation of the Barcelona Principles in the South African PR context, which often deviates from global theoretical norms. Building on existing literature of PR best practice, it asks: What normative guidelines can be set for implementing the Barcelona Principles in the unique South African PR landscape? A mixed-methods sequential explanatory design type was used to investigate current PR practices and the challenges and factors influencing the adoption of the Barcelona Principles among South African PR practitioners, drawing from surveys and semi-structured interviews with PR practitioners. Statistical analyses of quantitative data were used to determine the correlations between PR practice and measurement and evaluation practices, and interview information was used to understand trends and provide insight into practitioners' interpretation of the constructs investigated. The findings concluded that PR best practice and the measurement and evaluation thereof is inextricable in South African practice, where the level of practice maturity determines the level of measurement maturity that is possible. This relationship can be conceptually plotted on a matrix of practice- and measurement maturity. Negotiating practice maturity and measurement maturity would allow for the implementation of the Barcelona Principles in the South African PR practice, and seven guidelines are proposed for navigating the matrix towards the ultimate goal of evaluation. The study creates the opportunity for further investigation of the practice-measurement maturity matrix to refine the concept for South African practice to establish a useful tool that can pragmatically guide practitioners toward more mature practices on both axes of the matrix.

Keywords: Barcelona Principles; cybernetics; evaluation; excellence; measurement; public relations; relationship management; South African PR practice; standardisation; strategic communication management

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CHAPTER 1. CONTEXT, PROBLEM STATEMENT, AND RESEARCH QUESTIONS

1.1 Introduction

One of the largest current debates in global public relations (PR) literature is measurement and evaluation of PR efforts to determine how the value of the PR function can be proven. This is not a new debate, nor is it a new topic of research – over the years many studies have been conducted globally in an attempt to prove the value of the PR function with a variety of different perspectives and results (Lindenmann, 2005; Watson, 2012a; Volk, 2016). A stream of literature on modern organisational communication of the past 50 years argued that the value of the PR function lies in its contribution to organisational excellence – the PR function helps organisations to reach their goals. PR measurement and evaluation will ultimately enable the PR practitioner to show this value, an action long since demanded by management (Macnamara, 2005:1; Paine *et al.*, 2008:4; Grantham *et al.*, 2011:1; Michaelson *et al.*, 2015:3).

PR's contribution to organisational excellence has become an almost foundational truth. This truth remains, even as the definition of excellence evolves. In other words, while the *why*, *how*, and *when* is continuously shifted by environmental evolution, the *what* remains the same. Businesses are increasingly starting to engage with issues beyond commercialism, creating social value, changing corporate cultures, and using technology-centred approaches to disrupt organisations and industries (Page, 2019a). In these processes, PR's role has evolved beyond a sender-receiver model of constructing messages and broadcasting it to audiences who are increasingly reluctant to listen. The role of PR in organisations has expanded to that of brand custodian, culture custodian, societal voice, and innovator. PR is an expected – and well-positioned – function to guide organisations through these changes, still as the competitive advantage for excellence.

This evolving role of the PR function raises many new questions for how the PR function's value can, and should, then be evaluated. While the PR industry is adjusting to the changing role of the function, it is also continuously asking the question of how it can be measured and evaluated. While many theoretical models have been proposed to standardise PR measurement and evaluation practices – working towards a global norm – the biggest advancement was the publication of the Barcelona Declaration of Measurement Principles (the Barcelona Principles) first published in 2010 by the International Association for the Measurement and Evaluation of Communication (AMEC). This set of seven principles aimed to provide a standardised framework within which PR practitioners could measure and evaluate their efforts to prove its value in organisations.

However, the Barcelona Principles was developed based on global PR best practice and norms, which are seldom an accurate representation of reality for PR practice in developing countries such as South Africa (Tindall *et al.*, 2003; Van Heerden, 2004; Tindall & Holtzhausen, 2011; Tindall, 2012; see also Al-Enad, 1990). South African PR practice has been found to deviate from theoretical prescripts for best practice, and it follows that South African PR practitioners may face barriers in measurement and evaluation that are not present in developed countries. Therefore, a degree of localisation¹ is required to guide practitioners in implementing the Barcelona Principles in the South African PR practice.

The practice-component for informing the discussion around measurement and evaluation in South Africa, is especially important. Little updated research is available that provides insight into how South African PR practitioners are conducting PR practices in terms of the fundamental theoretical structure of the PR function. The South African PR industry cannot be expected to meaningfully engage with global conversations around PR measurement and evaluation – and the standardisation thereof – if it is functioning in fundamentally different ways. Therefore, a relevant starting point for inquiry into measurement and evaluation in South African PR practice is to focus on current practice and core theoretical foundations of the PR function.

1.2 Theoretical background and context

1.2.1 PR practice for measurement and evaluation – background and context

This study's theoretical framework argues that the value of PR lies in its contribution to reaching organisational goals, a notion seen and proven throughout PR literature of the past 40 years (Grunig, 1992; Steyn, 2000b; Cutlip *et al.*, 2002; Van Ruler, 2003; Hallahan *et al.*, 2007; Macnamara & Gregory, 2018; Volk & Zerfass, 2018; Zerfass *et al.*, 2018). From a practice perspective, it is at the start of this discussion already recognised that what these organisational goals may be, are constantly evolving in practice and theory. Thus, organisational goals are not interpreted as purely commercial or performance-centred. Organisational goals can be articulated as commercial, societal, environmental, technological, or a combination of all.

¹ Baskerville (2003) describes the importance of localisation and the importance of considering context at national level in sociology research. Drogendijk and Slangen (2006) also inquired into cultural perception differences in business. Furthermore, Gregory & Halff (2012) warned against globalised theory that may equate to Americanisation, and highlights localised practice and Nessman (1995) discussed the differences between European and American PR practice.

Regardless of how organisational goals are defined for each organisation, it is well-established that PR is still a core component to reaching these goals and PR best practice that enables the PR function to bring about this value is thoroughly prescribed by theory.

This study has a strong practice-based focus, supported by a theoretical framework of established theory. In order to provide a structured framework for discussion with an emphasis on theory that had withstood the test of time, this study adopts a cybernetic meta-theoretical tradition where organisations are viewed as systems (Duffy, 1984; Murthy & Kummamuru, 2014). This view supposes that many cybernetic processes take place within organisational systems and PR plays a fundamental role in facilitating and ensuring the well-being of the system. Through the lens of the cybernetic meta-theoretical tradition, three paradigms are used to explain and investigate PR practice that enables a valuable PR function: the reflective paradigm, the functional paradigm, and the relational paradigm.

First, PR best practice is seen in the reflective paradigm which serves to illustrate PR's function of reflecting environmental changes into organisational strategy formulation- and decision-making processes (see Section 2.2). This act creates a degree of requisite variety that helps organisations as systems to withstand environmental changes. PR contributes to systemic viability by reflecting the organisational environment; but also by reflecting on *itself* to enhance the viability of the PR function, which holds several advantages (see Section 2.2.2). By reflecting on itself, the PR function becomes more robust and optimised and as a result it is able to prove accountability, compete for organisational resources, and gain credibility as a management function. As will be explained in the theoretical discussion of this study (Chapters 2 and 3), measurement and evaluation is a crucial component of PR's reflective function. The cybernetic Viable Systems model shows five control systems which, when placed side by side with PR measurement and evaluation activities, offers a valuable benchmark of criteria for a model or guidelines to standardise PR measurement and evaluation (see Table 3.3). In Chapter 3 of this study, the Barcelona Principles are evaluated against these five control functions to determine to what extent the principles align with the theory of best practice as described in the reflective paradigm (see Table 3.7).

PR can best perform its reflective function in an open organisational system which allows for communication to flow between parts of the system and its environment (see Section 2.2.1). A particular characteristic of open systems is that it employs feedback schemes as self-regulation to correct deviations and to ultimately achieve equifinality – maintaining the same end-state despite

variable initial conditions (Lindsey, 1972 citing Katz, & Kahn, 1978; also Gregory, 2000²). These characteristics are brought to life through the PR function and its continuous process of reflection with measurement and evaluation. Through monitoring change, PR allows the organisational system to push itself towards ever higher forms of organisation with a greater capacity for change.

Second, an open organisational system that can accommodate the reflective function of PR supposes a strategic approach in execution – this is found in the functional paradigm of strategic communication management (Section 2.3). A strategic approach to PR allows for aligning the goals of the PR function with the goals of the organisation (see Section 2.3). The underlying assumptions are a strategic approach to the organisation’s management in general, and also to the management of the PR function. This distinction is seen in works such as Volk and Zerfass’s (2018) discussion on strategic alignment. These authors’ discussion adds important nuance to strategic communication management theory in a pragmatic way that relates to practice, where they distinguish between primary alignment (of PR goals with organisational goals), and secondary alignment (where the PR function aligns its goals with its best tactics). This pragmatic distinction is important to PR measurement and evaluation aiming to prove the value of the PR function, because it addresses strategic PR practices in the broader organisational context (see Section 2.3.1).

Foundational to strategic management, in general, is the call for accountability and the PR function is not pardoned from this. In accordance with its reflective role, the PR function must also possess the ability to show accountability in its own actions, use of resources, and effectiveness in execution. Measurement plays a crucial role in accountability, where effectiveness is monitored throughout the strategic communication management process when PR activities are executed. However, this has not proven to be easy in the past (see Section 2.2.2).

Swenson *et al.* (2019) recently emphasised that it remains a challenge to determine whether PR activities are truly successful in impacting business growth, identity, or goals. PR’s struggle to prove accountability with proper measurement has been a topic of much discussion, where theoretical prescripts seldom find its way into practice. Studies investigating the challenges and discord between theory and practice (Macnamara, 1999; Cornelissen, 2000; McCoy & Hargie, 2003; Nikolic *et al.*, 2014; Macnamara, 2014; Macnamara, 2015; Henning, 2017; Buhmann & Likely, 2018³) have shown

² Gregory (2000) uses the key elements of Katz and Khan (1978) to describe these systems (many of these terms are common in PR theory): input; throughput/transformation; output; interrelationship/ interdependence; a transactional relationship with the environment; and boundaries.

³ Over the past two years, significant studies have been published that investigated the topic of measurement and evaluation which are used widely throughout this study for their timeliness and relevance – these include Buhmann and Likely (2018), Zerfass *et al.* (2018), and Swenson *et al.* (2019).

that PR practitioners' lack of response to management's call for accountability had left them unable to compete against other business functions. Failure to prove the function's value has left practitioners unable to vie for bigger budgets⁴ – leaving them to cope with bigger problems with smaller budgets, and so spiralling down into less credibility, less autonomy, lower priority and ultimately a greater risk of position elimination (Hon, 1998; Austin *et al.*, 2000; Macnamara, 2005). PR measurement and evaluation can overcome these issues when conducted successfully in practice. The topic of stakeholder relations, brought to prominence by South Africa's King IV Report on Corporate Governance for South Africa, has served to promote many professionals to C-suite level positions. However, if stakeholder relations are regarded a sub-section of strategic communication management, the holistic function's measurement and evaluation are not yet as prominently effective.

The strategic communication management framework (including stakeholder management) and PR measurement and evaluation also provide the basis for a managerial view on the PR function. The movement for proving PR's worth is, after many years, still largely driven by the need to motivate the PR practitioner's seat at the table with top management as part of the dominant coalition. The strategic communication management framework prescribes the PR practitioner's role as strategist in order to enable strategic goal alignment and ultimately prove the value of PR (see Section 2.3.1). However, if the practitioner does not function as strategist to begin with, it will be difficult to gain access to strategic organisational information in order to align PR goals with that of the organisation. PR practitioners may then be unable to fully realise the value of the PR function, or be unable to prove that the function has strategic value, and be further excluded from strategic processes. This strategic focus on PR practice also raises the question of strategic intent in organisations – strategy, a word with many negative connotations, requires implementation and formulation from a symmetrical worldview, where a symmetrical communication model should theoretically be employed (see Section 2.3). Underlying asymmetrical strategic intent in the organisation may hinder systemic viability, as the insights produced by PR's reflective role can bring harm⁵. Symmetrical intent in practice is thus considered a crucial component of PR best practice when strategic communication management is implemented.

⁴ Increasing competition for budget allocations in virtually every industry may be driving an even greater gap in the measurement and evaluation of PR efforts compared to other functional areas. A 2009 survey of top-level executives across a range of industries showed that companies that employ more sophisticated measures of marketing impact are more likely to increase those budgets even during economic downturn. As managers come under pressure to develop Return on Investment (ROI) metrics for literally every expenditure, PR practitioners will not be exempt from this expectation.

⁵ The *Bell Pottinger* scandal of 2018 serves as an illustration of the negative impact of asymmetric PR.

Third, a natural outflow from a symmetrical strategy, implemented through strategic communication management, is strong relationships with organisational stakeholders. The relational paradigm considers organisation-stakeholder relationships as a crucial component contributing toward excellence. The Excellence Study concluded that PR's contribution to organisational excellence, i.e. its contribution to reaching organisational goals, is brought about through its relationships with stakeholders (see Section 2.4). It has since been expanded and reinvestigated from a variety of perspectives in more recent research while its core tenets remain (Tyma, 2008; Greenwood, 2010; Laskin, 2011:155; Macnamara, 2011; Sisson, 2017; Zerfass & Viertmann, 2017). This body of literature, that describes the way in which organisation-stakeholder relationships should be built and maintained, describes the beneficial outcomes of strong organisation-stakeholder relationships. The theoretical paradigm of relationships is linked to strategic communication management in that it sees strategic communication management as a necessity to enable stakeholder relationships. The functional and relational paradigms are brought together to advance PR measurement and evaluation in works such as that of Zerfass and Viertmann (2017) where they derived specific value dimensions for the PR function situated in both the functional paradigm and the relational paradigm to accommodate a managerial, strategic perspective as well as the intangible outcomes of the relational paradigm to promote reporting on the value of the PR function (see Section 2.4.4 and Section 3.3.5).

The role and effect of PR measurement and evaluation in PR best practice that spans across the reflective, functional, and relational paradigms should allow for enhanced organisational performance, but in its practice there exist several challenges that impact PR practitioners' measurement and evaluation (see Section 3.2.1). The most prevalent obstacles to measurement and evaluation in practice are cited as lack of budget (the cost of measurement and evaluation), a lack of resources (such as time, practitioner knowledge or expertise, standards, employer or client interest, and research instruments or tools), and complexity in showing a connection to organisational outcomes – i.e. strategic communication management (Xavier *et al.*, 2005; Macnamara, 2015; The Holmes Report, 2016; Likely, 2018; Zerfass *et al.*, 2018). A study by Austin *et al.* (2000) had previously found that the barriers practitioners face differ depending on what role the practitioner fulfils. Practitioners functioning as technicians experienced time and training as their largest barriers to implementing formal research of their efforts, while practitioners in managerial roles considered budget as their major constraint, leaving them to rely more on intuition than research. The intangible nature of PR outcomes also hinders practitioners because it is often nearly impossible to ascribe a quantitative value to PR outcomes such as silencing negative issues or averting bad publicity through relationship management (Dimitrov, 2015).

Relating to practitioner perceptions of PR measurement and evaluation, Baskin *et al.* (2010; also Watson & Noble, 2007) found that perceptions of effectiveness and actual use in practice are not related for most of the advanced techniques of measurement and evaluation. A 2011 study conducted by AMEC⁶ found that 42% of PR practitioners believed that no standard practice for PR measurement and evaluation existed (Michaelson & Stacks, 2011). Watson (2011) found that 65% of practitioners felt that there is no 'one size fits all' approach to measurement and evaluation, and that 'PR is not like business and finance' and therefore PR cannot rely on the same measurements. The 2019 *Global Communications Report* showed that pressure to deliver a measurable Return on Investment (ROI) is the main driving factor for practitioners to adopt technology in their operations (USC, 2019). When asked why PR departments are side-lined in corporate decision-making at the 2018 South African In2Innovation Summit by The Holmes Group, president of WE Communications Alan VanderMolen⁷ stated that it is because "we [PR practitioners] have absolutely, abhorrent and behind the times insights and analytics". VanderMolen (2018) argued strongly for ascribing "any kind of value" to PR activities. The industry itself appears to still be divided on measurement and evaluation in terms of practitioner perspectives, while there has been considerable theoretical attention paid to the subject.

The need for standardisation of PR measurement and evaluation was born from overcoming these issues and the gaps between theory and practice. This requires the prescription of qualitative and quantitative research, at different organisational levels, at different stages of the strategic communication management process, using different metrics determined by the goals of the PR campaign – with the eventual aim of reporting on the value of the PR function to enhance systemic viability.

1.2.2 Standardisation of PR measurement and evaluation

PR measurement and evaluation has a long history of academic and industry attention. It has evolved from its early stages of press clippings in one-way publicity-centred communication practice, to a sophisticated paradigm that describes its practice across business levels in an integrated, iterative process (see Table 3.1). Its advancement began with academic consensus on the value of PR. Evaluation in the strategic communication management framework proves this agreed-upon value through different types of evaluation, and are reported on through different value dimensions (see

⁶ The study was conducted among UK, American and European PR practitioners (Michaelson & Stacks, 2011).

⁷ VanderMolen has since stepped down as president of WE Communications in 2019.

Section 3.3). Evaluation is informed by measurement - an ongoing process of monitoring activities using different metrics that show change at outcome, uptake, and output levels (see Section 3.4).

Critical points of concern arise from discussions around measurement metrics from established literature. These are mainly a lack of consensus on the vast amount of measurement metrics available, and invalid/discredited metrics' prevalence in practice that shows pseudo-success by displaying large but meaningless numbers. Problematic metrics are pointed out by industry bodies such as AMEC and in academic literature - ROI and Advertising Value Equivalence⁸ (AVEs) as metrics are emphasised (see Section 3.4.1). These metrics conflict with best practice prescripts because they speak to management, in managerial terms that are often accepted and to some extent understood in terms of proving effectiveness, but they are more often void of true meaning and unable to convey value. Many theoretical models have been developed in an effort to overcome this issue and prove value through accurate and reliable metrics, but these models have often created more confusion in theory and showed little uptake in practice because they do not display a unified framework (see Section 3.5). Academic models have often created new terminology, showed different sequences of practice, and are rooted in different theoretical frameworks. To a large extent, they have been unable to accommodate the variety found in PR practice and has similarly failed to eliminate bad practices, or have proven to be very difficult to implement. In this light, the industry gravitated towards a more flexible approach for standardising PR measurement and evaluation in the form of guidelines – in 2010, the first draft of these was published by AMEC as the Barcelona Declaration of Measurement Principles (the Barcelona Principles).

The original goal of the Barcelona Principles as standardising framework was to provide guidelines to measure the efficacy of communication campaigns, to provide a basis to enable replacing outdated program measurement models, and to ultimately end years of debate as to whether metrics such as AVEs should be used (Rockland, 2015). The importance of the Barcelona Principles lies in creating a basis for measurement and evaluation programmes with emphasis on strategic alignment and the means for practitioners to legitimise their efforts (Bodie, 2014). The Barcelona Principles were first undersigned in 2010 by over 200 PR practitioners as representatives of the industry and in 2015 a revised edition was published as the Barcelona Principles 2.0 (AMEC, 2015a). These principles are rooted in strategic communication management and embody the cybernetic control systems mentioned at the start of this chapter, so aligning practice and theory (see Table 3.7). At first, the

⁸ AVEs are a measurement metric where PR practitioners measure the financial worth of media coverage by multiplying column centimeters of editorial print media coverage and seconds of broadcast publicity by the respective media advertising rates (Macnamara, 2008b:1).

uptake of these principles was low in practice but after 9 years, a second published draft, and several awareness campaigns and supporting documents and frameworks, the Barcelona Principles have gained traction in global PR practice.

The Barcelona Principles 2.0 as published by AMEC (2015) state that:

1. Goal setting and measurement are fundamental to communication and PR.
2. Measuring communication outcomes is recommended versus only measuring outputs.
3. The effect on organisational performance can and should be measured where possible.
4. Measurement and evaluation require both qualitative and quantitative methods.
5. AVEs are not the value of communication.
6. Social media can and should be measured consistently with other media activities.
7. Measurement and evaluation should be transparent, consistent and valid.

Taking a prescriptive approach, these guidelines set PR practitioners on a path to proving value, suggesting ‘things to always keep in mind and implement’ when undertaking measurement and evaluation. While the principles have not gone without critique, it is the most valuable framework in current PR practice and theory to eliminate bad practices and to create awareness of PR measurement and evaluation best practice (see Section 3.6).

Globally accepted by academics and practitioners, the Barcelona Principles’ implementation proves to be more challenging in specific PR contexts⁹ – because the principles were developed in accordance with global best practice, country-specific PR practice that deviates from global norms may not find it easy to implement the Barcelona Principles. This is the case for South African PR practice (see Section 3.6.4).

South African PR practice deviates from theoretical PR best practice and global norms, and as a result also in measurement and evaluation practices. Studies and industry reports have found PR measurement and evaluation in South Africa to lag behind global benchmarks: the 2018 *World PR Report* found the global use of AVEs at 52%, while this number rises to 72% in Africa (ICCO, 2018). According to the Public Relations Institute of Southern Africa (PRISA, South Africa’s PR industry governing body), the majority of South African practitioners are using AVEs (PRISA, 2016). Moreover, South African PR practice does not follow theoretical prescripts for practitioner roles, organisational worldviews, or communication models. Instead, South African PR practice takes a

⁹ Swenson *et al.* (2019:3) highlighted the fact that country-specific culture often influences practice (roles, management practices, and motivations). Volk (2017) stated that strategic communication is heavily influenced by different cultural contexts.

situational approach, often implementing symmetrical and asymmetrical practices and models as dictated by the situation (see Section 2.3.3). PR practitioners in South Africa often fulfil multiple roles within their organisation (the general roles of strategist, manager, and technician all at once), and employ country-specific PR models such as the African Dialogic model or Ubuntu model along with traditional theoretical two-way or one-way communication models. South African PR practitioners also place more emphasis on relationship building in their unique function of translating across cultural boundaries and fostering understanding among very different stakeholders and organisations (see Section 2.3.3). While South African practice deviates from theoretically accepted standards, South African PR practitioners also face the global challenges already mentioned such as lack of time, talent, and budgets, and are affected by issues such as the global confusion over implementing metrics due to the many variables in the PR landscape (see Section 3.2.1). These variables are even more pertinent given the variety that is seen in South Africa's country-specific practice and it may perhaps pose an even bigger challenge than in the 'typical' practice of developed countries.

To contribute to South African PR practice challenges, a 2009 study by Meintjes *et al.* furthermore found that South African PR practitioners had a limited understanding of the importance of PR in an organisation. Because their understanding of PR's role is limited, their understanding of its strategic implementation was narrow (Meintjes *et al.*, 2009:78). However, 10 years later South African practitioners are rising to the challenge as media research agencies and PR consultancies are investing in developing measurement software with tools such as Reputation Matters's Repudometer© to quantify reputations (Reputation Matters, 2018), the Professional Evaluation and Research's (PEAR) social media monitoring software (PEAR, 2017), and WE Communications's media monitoring software they are piloting in 2019 in South Africa (VanderMolen, 2018). African and South African PR practice can compete with the best in the world, and has featured on the global stage at many points over the past few years. In 2015, the first World Conference on Public Relations in Emerging Nations was hosted in Kenya with more than 400 delegates representing 25 countries (Global Alliance, 2015). Around the same time, South Africa hosted the annual International Public Relations Institution (IPRA) conference (IPRA, 2014). The pan African brand intelligence research firm, Ornico, won two gold awards at the international AMEC Awards 2016 (AMEC, 2016), showing that African measurement can compete with the best in the world. This leads to the question of why the Barcelona Principles aren't widely implemented in the South African PR context.

The South African PR practice should theoretically be able to implement the Barcelona Principles. However, issues such as the lack of standardisation in terms of metrics, global challenges to PR measurement, the use of discredited metrics such as AVEs, or practice-related factors where South African PR practice deviates from global norms, may be constraining the uptake of the Barcelona

Principles in the South African PR practice. If PR measurement and evaluation, aligned with global standards, is to become the norm in South African practice, the challenges and factors influencing the adoption of standardised PR measurement and evaluation in South Africa must be investigated and bridged.

1.3 General and specific research questions

1.3.1 General research question

Against the background, the general research question of this study is formulated:

What normative guidelines can be set for implementing the Barcelona Principles in the unique South African PR landscape?

1.3.2 Specific research questions

The following specific research questions are drawn from the general research question:

1. What role does PR measurement and evaluation play in PR best practice, according to established theory?
2. How is PR measurement and evaluation standardised in current established theory and practice?
3. How do PR practitioners in South Africa measure and evaluate their PR efforts and report to management on programmes?
4. What factors and challenges influence South African PR practitioners' adoption of standardised measurement and evaluation practices?

An inquiry into South African PR practitioners' current measurement and evaluation practices, as well as the context of their PR practice, can aid in setting normative¹⁰ guidelines for implementing the Barcelona Principles in South Africa's PR practice to gain the benefits of proving the value of the PR function.

¹⁰ Normative is, for this study, defined as "what should be done, but in a practical context" (Toth, 1994:51). According to this definition, 'normative'-branded theory should "provide solutions under typical conditions encountered in actual PR practice". The use of 'normative' to describe these guidelines link to the Barcelona Principles' prescriptive approach, providing guidelines for *how to comply* with a specific assumed standard (in this case, how to comply with the Barcelona Principles) and stands opposed to informative (or descriptive) guidelines that would promote *conceptual understanding*.

1.4 General and specific research objectives

1.4.1 General research objective

Following the specific research questions, the study's research objectives are set in response. The general objective for the study is formulated accordingly:

The general objective of this study is to set normative guidelines for implementing the Barcelona Principles in the unique South African PR landscape.

1.4.2 Specific research objectives

This study sets the following specific research objectives drawn from the general research objective as follows:

1. To determine the role of PR measurement and evaluation in PR best practice, according to established theory, by means of a literature study;
2. to determine the way in which PR measurement and evaluation is currently standardised in established theory and practice, by means of a literature study;
3. to determine the way in which PR practitioners in South Africa measure and evaluate their PR efforts and report to management on programmes, by means of surveys and semi-structured interviews;
4. to determine the factors and challenges influencing South African PR practitioners' adoption of standardised measurement and evaluation practices, by means of surveys and semi-structured interviews.

1.5 Guiding theoretical framework and arguments

This study draws from several established PR theories and works on organisational structures, strategic management, communication roles, symmetrical communication, and stakeholder relationships that inform this examination of PR measurement and evaluation and the standardisation thereof. This study is grounded in the following theoretical framework:

Table 1.1. Theoretical framework of this study

Reflective paradigm	
Meta-theoretical tradition	Cybernetics
Guiding theories	Systems theory, Viable Systems model
Functional paradigm	
Guiding theories	Strategic management, strategic communication management, roles theory, two-way symmetrical communication
Relational paradigm	
Guiding theories	Stakeholder theory, excellence theory, relationship management theory

Table 1.1 describes this study’s theoretical framework discussed in Chapter 2. Chapter 3 builds on this framework to explore PR measurement and evaluation and how these practices are standardised. The following theoretical arguments are presented in this study:

- In the reflective paradigm PR fulfils a cybernetic reflective function in organisations, seen in its practice of measurement and evaluation, to enhance systemic viability.
- In the functional paradigm PR must be strategically managed and aligned, and symmetrically practiced to bring about the value of the PR function.
- In the relational paradigm the outflow of strategic communication management is strong stakeholder relationships, further enabling the value of the PR function.
- PR evaluation must be practiced with a strategic approach to prove the value of the PR function. This entails its practice across all business levels and reporting according to the value dimensions derived from the reflective, functional, and relational paradigms. Different types of evaluation are required at different stages.
- PR measurement must inform PR evaluation through the continuous implementation of valid measurement metrics to prove effectiveness of PR activities.
- Standardisation of PR measurement and evaluation to enhance its practice and profession through implementing the Barcelona Principles is necessary but challenging in the South African PR context because South African practice deviates from theoretical norms and faces different challenges than developed countries’ PR practice from which these principles were developed.
- Localisation of the Barcelona Principles is required for its South African uptake, by setting normative guidelines for South African practitioners to implement the Barcelona Principles.

1.6 Contribution of the study

This study's main contribution to the body of PR research will be to provide normative guidelines for implementing the Barcelona Principles as they exist, in the unique South African PR context with specific consideration for South African practice, challenges, and factors that influence practitioners' adoption of standardised measurement and evaluation practices. The Barcelona Principles is the industry's largest move towards standardisation in measurement and evaluation. Given its pivotal role in moving the industry towards more robust and credible measurement and evaluation practices, its adoption in South African PR practice plays a crucial role in the local industry's enhancement and credibility as well as its alignment with global best practice. In determining current practices and what factors and challenges influence South African PR practitioners' measurement and evaluation, then providing guidelines on how the Barcelona Principles can be implemented in this context, this study will contribute towards South African PR practice and practitioners' understanding of how global standards applies to their work.

This study will serve to establish a clear and updated reflection of South African PR practitioners' perceptions, implementation and challenges in measuring, evaluating and reporting on their PR efforts. It will also provide an updated image of current PR measurement and evaluation practice in South Africa, laying the foundation for more research concerning current practices and identifying gaps for future inquiry. It will furthermore provide insight into PR measurement and evaluation for developing countries across Africa with a similar PR context, facing similar challenges. Given PRISA's expansion into Southern Africa, the results of this study may inform research in Southern Africa where overlapping practices and challenges are seen. This study also has pragmatic value, as it will enable PR practice in South Africa to better implement globally accepted standards for practice of PR measurement and evaluation, which will allow practitioners to better justify their role and value in organisations, move into more strategic roles in organisations, and will allow them to compete for organisational resources to the advancement of the practice as a whole in South Africa.

1.7 Research approach

In order to conduct an exploratory inquiry to determine how the Barcelona Principles can be implemented in a localised context, the research approach of this study is set out in Table 1.2 below:

Table 1.2. Research design of this study

Research paradigm	Mixed-methods approach
Research design	Mixed-methods sequential explanatory design with multi-level integration
Methods	Surveys Semi-structured interviews
Population	South African PRISA members South African PR practitioners
Research Instruments	Electronic survey questionnaire Semi-structured interview guide
Data analysis	Statistical analysis of quantitative data: surveys Narrative description of qualitative information: transcribed interviews

This study's empirical investigation adopts a mixed-methods research design as illustrated in Table 1.2. A mixed-methods research approach serves to best explore this study's topic, allowing for using the strengths of both the qualitative and quantitative research paradigms to explore a complex topic, as suggested by Du Plooy (2008:40). This study follows a sequential explanatory design type where quantitative data is further explored with qualitative methods. This approach allows for gathering both large quantities of data and drawing meaningful insights. As social research, this study's research approach provides generative results where guidelines for practice can be proposed based on a contextual understanding of current practices (Ritchie & Lewis, 2003:27; Babbie & Mouton, 2011).

1.7.1 Literature review

The theoretical development surrounding PR measurement and evaluation has boomed in the past two decades and there is no shortage of studies conducted, as well as white papers, reports, case studies, and academic literature on this topic. PR literature offers an arsenal of theories to support this study. Several international studies investigate and discuss the relevance of the systems theory (Ledingham, 2003; Rhee, 2004; Hung, 2005; Smith, 2009; Sousa, 2010; Stoker, 2014; Kenworthy & Verbeke, 2015; Van Ruler, 2015), strategic communication management, the excellence theory, and the relationship management theory (Savage *et al.*, 1991; Bruning & Ledingham, 1998; Hon &

Grunig, 1999; Adnan, 2000; Bruning & Ledingham, 2000; Grunig & Grunig, 2000; Hung, 2001; Grunig, 2002; Gupta & Becerra, 2003; Bruning *et al.*, 2004; Hung, 2005; Lee & Evatt, 2005; Smith, 2009; Grunig & Grunig, 2011; Laskin, 2011).

In the South African context, strategic communication management and PR are well-documented and have been investigated from several stances that includes emphasis on the excellence theory and stakeholder relationship management – such as its application in the non-profit sector (Naudé, 2001; Wiggill, 2009; Mopeloa, 2015), corporate communication, and internal communication (Wood, 2006; Theunissen, 2007; Van Rooyen, 2007; Greeff, 2011; Le Roux, 2011; Peega, 2011; Reyneke, 2013; Cloete & Holtzhausen, 2016; Makgopa, 2016; Mmope, 2016; Gerhardi, 2018), PR practitioner roles (Steyn, 2000a, 2000b, 2000c; Van Heerden, 2004; Venter, 2004; Le Roux, 2010; Le Roux, 2011; Grobler, 2014), and relationship management (Holtzhausen, 2007; Van Dyk, 2007; Khoza, 2015; Van Dyk, L.I., 2014; Cronje, 2016; Pressly, 2016). However, no recent local studies were found addressing measurement and evaluation of PR efforts, or the standardisation thereof.

The following databases have been consulted: NRF; NEXUS; ProQuest; Ferdinand Postma Library Catalogue; North-West University Boloka Institutional Repository; SACat; SA ePublications; JStor; EBSCOHost: Academic Search Premier, Communication & Mass Media Complete; ScienceDirect; Taylor & Francis; Sabinet Online; and Emerald Insights. To date, there has been no study found that investigates the implementation of the Barcelona Principles in a South African context or attempted to set normative guidelines for implementing the Barcelona Principles in the unique South African context.

1.7.2 Empirical research

A mixed-methods research approach is used that employs quantitative survey questionnaires and qualitative semi-structured interviews to explore the topic of this study among PR practitioners in South Africa. This approach allows for both the collection of large amounts of data as well as insightful explanatory practitioner views on PR measurement and evaluation and the implementation of the Barcelona Principles. Several theoretical concepts and constructs are identified in Chapters 2 and 3 which impacts the implementation and adherence to the Barcelona Principles, and research instruments are designed then to measure and explore these concepts and constructs in South African practice.

1.7.2.1 Research participants and population

This study's population consisted of South African PR practitioners who are affiliated with PRISA¹¹, PR practitioners that are listed on the PR and Communications directory of the online industry platform, Bizcommunity, and PR practitioners and agencies subscribed to the media listing service ListPerfect. A minimum of 100 respondents to the quantitative phase of inquiry was targeted in order to perform statistical analyses, and a response rate of 103 valid responses was obtained. In the quantitative phase of the empirical investigation, practitioners from these groups in any role and level of employment were asked to complete the self-administered questionnaires to investigate how their PR function measures and evaluates their efforts and reports to management on these efforts, to what extent the Barcelona Principles are adopted in practice, what factors influence their measurement and evaluation practices and what challenges they face. Drawing from a typical case sample of quantitative survey respondents, six participants agreed to participate in qualitative semi-structured interviews of 60 minutes or more, which focused on exploring the study's constructs and concepts in more detail, gain practitioners' insights on these topics, and further explore the trends that were seen in the quantitative data in order to complement and explain these findings.

1.7.2.2 Survey questionnaires

Electronic, quantitative self-administered questionnaires were used to investigate the topics as they were set out in the research objectives. The survey was used to inquire into practitioners' adoption and awareness of the Barcelona Principles, their reflective practices, functional practices, and relational practices, and measurement and evaluation practices. Correlations between these facets of South African PR practice were then analysed, and statistical analyses applied to determine predictors and hindrances of standardised practices. Looking at how the current practice aligns with the prescripts of the Barcelona Principles, the findings were used to determine the elements that challenge and influence practitioners' ability to adopt the Barcelona Principles in practice and these insights were used to inform the discussion on setting normative guidelines for implementing the Barcelona Principles.

Data was analysed with help from the Statistical Consultation Service of the North-West University. Quantitative data from questionnaires was analysed with descriptive and comparative statistics, using Spearman's Correlation coefficient, t-tests, and ANOVA analyses. Statistical analyses were conducted using SPSS data analysis software.

¹¹ Student members of PRISA were excluded to ensure an understanding of only *current practices in the field*.

1.7.2.3 Semi-structured interviews

Nationwide participants in the study that participated in the survey and represented a typical case of all survey respondents were invited to participate in qualitative semi-structured interviews to further investigate the research topics. This contributed to gaining a deeper understanding of the perceptions of PR practitioners regarding measurement and evaluation practices, as well as challenges they faced in this field and what the consequences are of implementing standardised measurement and evaluation practices. The interview schedule contained standardised items/questions/topics, but the interviewer was able to deviate from this to respond to the interviewees' responses as allowed by semi-structured interviews (Du Plooy, 2008:198). The aim was to conduct 10 interviews to ensure maximum representation of the population, or until saturation was reached. Finally, six interviews were conducted with practitioners representing the typical case of the survey respondent population. Interviews were conducted via Skype, Zoom, and telephone (WhatsApp video calls).

Interviews were transcribed verbatim and in table format according to the concepts and constructs identified in the literature chapters of the study which were used to create the research instruments.

1.8 Ethical considerations

When conducting research, several ethical principles must be considered such as voluntary participation, anonymity, doing no harm, confidentiality and misleading participants (Babbie & Mouton, 2011:521-526). The North-West University's ethical standards were used to guide this study and the proposed methodology was approved by the NWU ethics committee before conducting research among the population. Before conducting research among PRISA members, permission was obtained from PRISA CEO Mr. Viktor Sibeko to include members in surveys and interviews. Other contact information was gathered from publicly listed platforms or used with the express permission of the information owner. Throughout the study, ethical considerations were taken into account. Participation was voluntary for all research methods employed and participants' identities are protected when reporting results. All participants were informed of the study's purpose and encouraged to ask questions if there are any uncertainties about ethical considerations. Participants were very careful of protecting their identities and requested specifically that no information may be reported, or reported in such a way, that it may reveal their identities, their businesses, or their competitive advantage in the industry. Special care was taken to report information in such a way that none of these details could be deduced or revealed.

1.9 Chapter layout

Chapter 1: Context, problem statement, and research questions

Introduction and orientation of the study's context, research questions, and main components.

Chapter 2: Theoretical framework of PR practice and PR measurement and evaluation

Contextualisation of the role of PR measurement and evaluation within established PR best practice and PR theory.

Chapter 3: Standardisation of PR measurement and evaluation

Examination of how PR measurement and evaluation is standardised in current established theory and practice.

Chapter 4: Research methodology

Discussion of the methodological approach and research methods in order to effectively answer each specific research question, and ethical considerations of this study.

Chapter 5: Results for PR practice and measurement and evaluation in South Africa

Presentation and interpretation of empirically collected data of South African PR practitioners' practice and measurement and evaluation, its standardisation, and its effect on practice.

Chapter 6: Discussion and recommendations

Conclusions and recommendations on the standardisation of measurement and evaluation for South African PR practitioners in the form of normative guidelines for implementing the Barcelona Principles in the unique South African PR landscape.

1.10 Conclusion

This introductory chapter provided a brief overview and contextualisation for PR measurement and evaluation, arguing that it plays a fundamental role in bringing about the value of the PR function but also detailing why it is a problematic issue. Measurement and evaluation as part of a reflective strategic communication management process informs the PR practitioner of the value and effectiveness of their activities. This allows them to adjust their PR programmes as required, leading to a more robust and accountable PR function that adds organisational value. It was argued that PR measurement and evaluation is a necessary and beneficial practice, but many challenges persist that hinder its implementation.

The move toward standardised PR measurement and evaluation through implementing the Barcelona Principles will undoubtedly enhance the industry and move the practice closer to global professionalisation, but these principles are based on global norms. South African PR practice faces more variety, more challenges, and deviates from global norms in its PR context. Where localised practice exists, the Barcelona Principles require localisation for implementation. Through the process of empirical inquiry described in this chapter, this study investigates current South African PR practice and the challenges and factors influencing the adoption of standardised PR measurement and evaluation practices to ultimately set normative guidelines for implementing the existing Barcelona Principles in the South African context.

The Barcelona Principles is rooted in current PR best practice and Chapter 2 will next explore this and the role of PR measurement and evaluation according to established theory.

CHAPTER 2. THEORETICAL FRAMEWORK OF PR PRACTICE AND MEASUREMENT AND EVALUATION

2.1 Introduction

The first chapter of this study provided an overview and contextualisation of PR measurement and evaluation practices, describing the importance of implementing a standardised framework for global PR measurement and evaluation. The most prominent form of standardisation currently exists as the Barcelona Principles – global guidelines designed for the global PR context. Considering that South African PR practice often deviates from global norms, the general objective of this study is to *set normative guidelines for implementing the Barcelona Principles in the unique South African PR landscape.*

This chapter explores the criteria and conditions that will ultimately enable PR practitioners to effectively measure and evaluate their efforts using the Barcelona Principles. It serves to explain that PR best practice, described by theory, will create a conducive environment for implementing measurement and evaluation and as such, the role of PR measurement and evaluation within theoretical best practice is illuminated throughout this chapter. Without understanding how PR should be practised and how the value of PR manifests, one cannot hope to effectively examine its measurement and evaluation. Against this background, the chapter aims to answer the first specific research question by *determining the role of PR measurement and evaluation in PR best practice, according to established theory.*

This chapter argues that the value of PR is embedded in three paradigms. First, in the reflective paradigm is PR's reflective role of feeding environmental information into the organisation's strategy-formulation and decision-making processes for enhanced systemic viability. This paradigm provides a strong 'why' through explaining why PR measurement and evaluation is necessary and beneficial. Second, in the functional paradigm of strategic communication management where PR goals are aligned with those of the organisation in order to contribute to reaching the organisation's goals. This paradigm prescribes certain conditions for PR practice in terms of the practitioner's role, the worldview adopted by the organisation, and the communication model employed. It provides a clearer understanding of 'how' PR should be practiced to enable measurement and evaluation and enable PR's value.

Third, in the relational paradigm where the strong organisation-stakeholder relationships are seen as an outflow of strategic communication management and an enabler of PR's contribution to reaching organisational goals. This paradigm provides an element of 'what' – relationships are an outcome of the practices described in the functional paradigm. The reflective, functional, and relational paradigms stand in a hierarchy, where the elements of each can be seen in the one's contained therein. Figure 2.1. depicts the hierarchy of these paradigms, as used in this chapter's discussion:

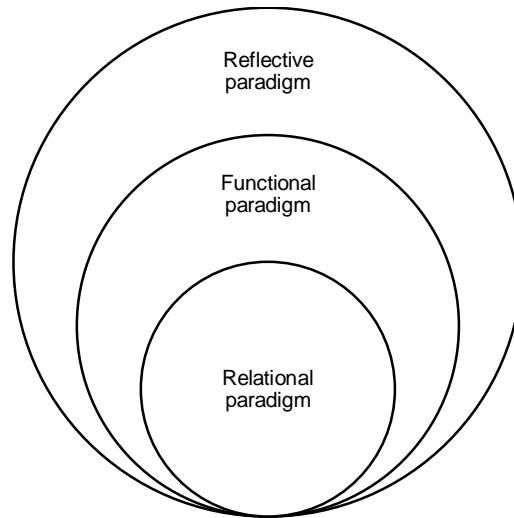


Figure 2.1 Hierarchical representation of theoretical paradigms

In this discussion, each of these paradigms is (to some extent) reduced to its basic and relevant premises (discussing all the facets of every paradigm would be near impossible within this chapter's scope). The relevant foundational assets of each paradigm are explored to create a frame of reference and to show how these paradigms govern practice and impact the measurement and evaluation of PR efforts. The theoretical body of literature on PR has become extensive and has been explored (due to its interdisciplinarity) from many different meta-theoretical stances.

This theoretical discussion starts with the cybernetic meta-theoretical tradition to create a logical framework for inquiry going forward. Originally a systems engineering concept, cybernetics offers a lens through which we may better understand complex systems in social sciences. The way systems interrelate and interact is generally prescribed by the systems theory, used here to inform the discussion. Systems theory remains, to date, one of the predominant theoretical underpinnings of PR practice and theory.

2.2 Cybernetic meta-theoretical tradition

Cybernetics is a discipline of science looking not at what things are, but how they behave (Umpleby, 2019). Cybernetics allows for analysing complex and dynamic systems by focusing attention on wholes and parts, and interactions and hierarchies. It emphasises behaviour, processes, and circular communication¹² resting on the fundamental concept of feedback – the word ‘cybernetics’ finds its roots in the Greek *kubernetes*, meaning ‘steersman’. The word’s origin alludes to its intrinsic inclination towards governance of any system. As such, it can be applied to nearly any field of scientific inquiry. The philosophy of cybernetics in social sciences essentially draws resemblances between living organisms and machinery¹³ (Weiner, 1961; Ashby, 1965; Broadhurst & Darnell, 1965; Beer, 1966; Duffy, 1984; Berardo, 2014; Porvaznik & Ljudvigova, 2016). As such, organisations can be viewed as cybernetic systems that work towards regulating themselves through interaction between parts of the system.

When viewing organisations as systems, systems theory serves to further explain how suprasystems and subsystems interrelate. Though there is strong congruence between cybernetics and systems theory, they are different in their main point of focus. In his theoretical comparison, Duffy (1984:35) distinguished these theories by stating that cybernetics studies all possible systems (whether they exist or can be designed) while systems theory focus on the parts of a system and relationships between these parts. However, both these theories are concerned with the hierarchical and teleological behaviour of systems governed by purpose (Witmer, 2006:362; Gunaratne, 2008:181; Mele *et al.*, 2010; Porvaznik & Ljudvigova, 2016:113).

Duffy (1984:34) defined a system as two or more parts working together to perform a task. Espejo (1994:202) defined the word ‘systems’ as mental constructs – cognitive distinctions – that may or may not relate to processes being constituted in the real world. Both of these definitions are applicable at different times. In essence, this section explores organisations as cybernetic systems, consisting of many interrelated parts, to show how communication in its reflective function contributes to the survival of the system, and then prescribes the conditions for an organisational system that is conducive to letting communication fulfil this role.

¹² Admittedly, communication has evolved far from and beyond the classic programme logic model of sender-receiver by Shannon and Weaver (1949), yet this origin remains useful to bear in mind when discussing communication from the cybernetic paradigm. Al-Fedaghi (2012) discusses this shift, especially at a technical level of communication as a conceptual foundation.

¹³ However, the theoretical framework found its origins in engineering and mathematics in discussing the automated control of machinery.

2.2.1 Cybernetics

Cybernetics across all fields, as mentioned in the introduction to this chapter, is concerned with complex, goal-directed systems and their manner of self-regulation through feedback. The goals directing these systems are defined from a systemic perspective as “preferred states pursued by an individual or institution, acting as driving forces in determining the individual or institution’s behaviour in transactional processes – generally, goals indicate what is hoped to be achieved through particular behaviour” (Wippersberg, 2009:54). In the process of self-regulation, communication facilitates the cybernetic *feedback loop* that allows the system in question to achieve and maintain its ideal state (goal) through ascribing purpose and decoding environmental feedback. This allows the system to gauge discrepancy between its current and desired states by measuring relevant criteria. The cybernetic feedback loop is commonly embodied by the PR function in organisations when it detects issues that may affect the organisation and feeds this intelligence into the organisational strategy¹⁴. The organisation can then make strategic adjustments to accommodate these changes and better reach its goals.

This process of adjustment is cybernetically termed *negative feedback* - when the system acts on the gathered information to adjust its own outputs to bring it closer to its desired state. When the environment’s reaction amplifies the system’s initial reaction, it is termed *positive feedback*. This constitutes a reflective process (looking on itself to promote self-understanding, as well as looking outward and reflecting that inward by decoding information¹⁵) through which strong reinforcing patterns are established. The process of constant feedback to attain the system’s desired state forms the *control loop*. The purpose of the control loop is to foster systemic unity between the system and its environment and in this process, the system can better survive and influence¹⁶ its environment (Ericson, 1972; Duffy, 1984; Krippendorff, 1985:58; Edwards, 1992; Schwaninger, 2001; Beer, 2002; Harwood, 2011; Verwey & Davis, 2011; Berardo, 2014; Murthy & Kummamuru, 2014; Johnson & Leydesdorff, 2015; Kummamuru, 2016; Vittikh, 2015; Bonnett, 2017:433).

¹⁴ This is seen most often in PR roles research and often mentioned in stakeholder relationship research (see Sections 2.3.3.1 and 2.4). Swenson *et al.* (2019) found PR’s function of connecting the organisation to its environment and stakeholders a crucial component of above-average performing PR departments. See also Burger’s (2009) discussion on PR’s reflective role as a critical component for social development.

¹⁵ Steyn and Butschi (2006) provides an in-depth discussion of the nuance of the reflective task of PR.

¹⁶ The concept of influence and strategy is discussed in more detail later in Section 2.3.

The nature of interaction between the system and its environment, also between parts of the system, is described by the systems theory as *open* or *closed*. It is important to understand how information flows between parts to determine the influence of communication in organisational systems. As cybernetics is a concept developed in engineering, it also caters for systems that do not have a control loop. These types of systems are known as closed systems, i.e. systems that are isolated from and do not interact with their environment. Although closed systems have a specific role to fulfil in engineering, they are not suited for the milieu of communication management and public relations – the nature of closed systems is that there is no relation with the public (environment), therefore, when applied in a PR environment, they are prone to progressive internal chaos (entropy), disintegration, and death.

In order to employ the cybernetic control loop, organisations need to function as open systems that allow for information to flow freely between parts of the system and achieve homeostasis through its interaction with the environment. This allows the system to reach its desired state. Open systems possess the qualities of wholeness, interdependence, hierarchy, self-regulation, environmental interchange, equilibrium, adaptability, and equifinality¹⁷ (Von Bertalanffy, 1968; Lindsey, 1972; Lilienfeld, 1978; Littlejohn, 1983:32; Midgley *et al.*, 1991; Gregory, 2000; Matjaz *et al.*, 2004; Edwards, 2006; Heath, 2006; Witmer, 2006; Gunaratne, 2008; Zeleny, 2009; Greenwood, 2010)¹⁸. In effect, the environment affects the system while the system affects the environment with its resulting actions.

Change is a constant phenomenon in open systems, as the system is pushing itself to ever higher forms of organisation (Warren *et al.*, 1998:361) and the way in which a system responds, is determined by its internal capacity for change. When the PR function of an organisation facilitates communication between parts of an open system and between the system and its environment, the system can effectively perform and gain feedback to achieve its goal state. A strategic PR function that realises this responsibility and creates a structured strategic control loop contributes to the overall wellbeing of the organisation¹⁹. The PR function will further interpret the environment for the

¹⁷ Systems are geared to achieve homeostasis. The basic condition for homeostasis is an equality of all parts of the unit and use of relations of equality between them. Within a system's structure, individual parts have different hierarchical positions resulting from subordination of differentiated tasks. This is called equifinality (Porvaznik & Ljudvigova, 2016:113).

¹⁸ See Gunaratne (2008: 176) for different types of systems that include conceptual, concrete, abstracted, regulated, totipotential (self-sufficient), autopoietic (self-reproducing) or hierarchical.

¹⁹ Open and closed systems concepts can also be applied directly to PR measurement and evaluation models (see Section 3.5). Closed-system evaluation takes place within a linear evaluation model, limiting evaluation to tactics and by implication this is a summative exercise. Open-systems evaluation accounts for environmental

organisation, determining what issues affect the organisation (or may possibly have a future effect) and in this, the PR function contributes to the survival of the system – termed *viability* in the cybernetic paradigm.

2.2.2 The PR function for systemic viability

Through its facilitation of the cybernetic control loop and reflective interpretation of environmental information, PR contributes to the survival of any system by providing the system with the capacity for change. In viewing organisations as open systems, the control loop is enabled by communication between organisational functions as well as the organisation and its environment. This reflective function of PR, a constant reflection on its own actions and reflecting environmental impacts into the organisation, creates the reflective paradigm of this theoretical inquiry. In the reflective framework, the value of PR lies in its capabilities to facilitate systemic communication with the ultimate goal of creating a stable organisational system capable of enduring change to reach its goals.

Holmström contributed significantly to the understanding of PR's reflective role. She emphasised and defined PR's reflective role in an evolving world where issues of legitimacy became more pertinent than ever. As such, Holmström (2004:122) saw the reflective paradigm as part of the new form of society's coordination that implies self-regulation in organisations within a poly-contextual reference. Her theory on PR's reflective role contained many cybernetic principles, adjusted to modern business and highlighting their importance in the modern world.

Holmström (2004:123) also described the difficulty in reflection, stating that it is not a natural ability for organisations as it requires multiple considerations and many resources. However, it has been a natural evolution towards reflection as many different realities collapsed into an understanding of the entire system, consisting of multiple base assumptions and value-systems, and the cybernetic network between these 'worlds' could only be negotiated and navigated through communication practices that were able to recognise and mediate these overlapping and conflicting systems. This view is prominently found in global practice, as the roles and expectations of executive PR practitioners change in modern organisations. A global survey conducted by Page (2019b:6) identified four dimensions of this role, where Chief Communication Officers (CCOs) are leading culture transformations, acting as brand stewards (taking this role from marketing), creating societal value for organisations, and using digital and data tools for transformation. These findings confirm a tangible manifestation of Holmström's reflective approach for communicators.

factors when evaluating the success of PR efforts, employing environmental monitoring and social audits to yield information on PR's effectiveness.

This reflective communicative practice will be seen later in this chapter at several theoretical points – PR’s strategic alignment of goals through strategic communication management (Section 2.3); the reflective role of PR practitioners as boundary spanners through environmental scanning (Section 2.3.3.1); the principles of dialogue and two-way communication management in organisational worldviews (Section 2.3.3.2) and communication models (Section 2.3.3.3); and the relational paradigm and the principles of the excellence theory (Section 2.4). The reflective function of PR is also seen in its reflection on the PR function itself to optimise its operations and prove its contribution to systemic viability (Section 3.3.1 and Section 3.6.2).

To explain systemic viability, organisational cybernetics is largely focused on Beer’s *Viable Systems model* constituting a generic systems framework to explain and analyse organisational survival. The Viable Systems model explains the structure of any viable system, consisting of a hierarchy of five interactive control systems: *operations* (the organisational department carrying out the work); *coordination* (a management team guiding operations); *optimisation* (ensuring that processes and management thereof occurs according to best practices); *auditing* (a function that continually ensures all operational processes are running according to set standards); and *strategy* (the guiding vision, mission and principles of the organisation) (Beer, 1984; Brocklesby & Cummings, 1996:50; Yolles, 2005:102). Brocklesby and Cummings (1996) illustrated the use of Beer’s Viable Systems model to successfully design viable organisational structures:

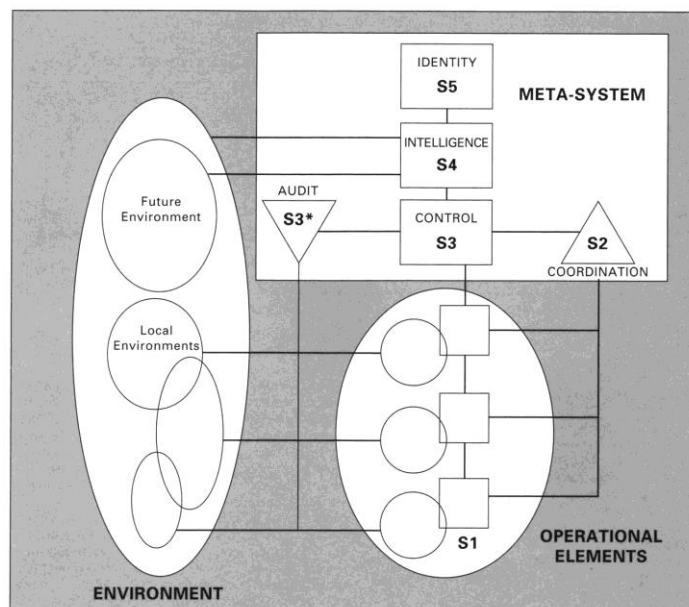


Figure 2.2. Visual representation of Beer’s Viable Systems model

(Source: Brocklesby & Cummings, 1996)

Figure 2.2. shows how each system in a larger system operates within an external and specific environment, and where the five control systems should be applied to organisations to deal with issues in order to remain viable²⁰. The system achieves viability through variety and requisite variety – *variety* denotes any existing or future environmental state²¹ that may affect the system, while *requisite variety*²² refers to the system's capacity to match the actual and potential systemic states that may impact the system's goal. Only if a system can achieve the necessary requisite variety to match its environment, will the system be able to remain viable (Beer, 1984:12; Brocklesby & Cummings, 1996:50).

The notions of variety and requisite variety can best be seen in the field of PR in the concept of environmental scanning, where the PR practitioner in its boundary spanning role (see Section 2.3.3.1) monitor's the organisation's environment to detect any environmental states that may impact the organisation and its stakeholders.

If the Viable Systems model and its functions are replicated in PR measurement and evaluation from an organisational cybernetics perspective, then the PR function as organisational structure can reflect on its own practice through measurement and evaluation, ensuring its own viability as well as that of the system. Standardised PR measurement and evaluation practice fits into this model's *auditing* function (continually ensuring all operational processes are running according to set standards) and in the most recent developments in the field of PR this came to being in the form of the Barcelona Principles for measurement and evaluation (see Chapter 3).

²⁰ Nechansky (2013) explored deviations from Beer's theory and found many organisations are still viable with simpler systems as well as more complex systems (see also Nechansky, 2009, 2011).

²¹ An environmental state is the exact current condition of the environment at any point in time (Brocklesby & Cummings, 1996:50).

²² Refer to Ashby's Law of Requisite Variety, positing that in order for a system to remain viable it must be able to match all possible states of the environment (Beer, 2002; Beer, 1984). Esade and McKelvey (2010) built on this framework to reconcile modernist and postmodernist approaches to studying organisations from an overarching framework.

In practice, this means that an organisation functioning as an open system needs to:

- Have a clearly defined goal and work towards reaching that goal.
- Be responsive to environmental changes through monitoring its environment and making strategic decisions in reaction to or anticipation of environmental fluxes.
- Have an internal capacity for change embedded into the organisational culture²³, hierarchy, and structure.
- Allow communication to flow between different organisational parts.

From a cybernetic perspective and taking the Viable Systems model into account, organisations functioning as open systems allow for effective PR practice in its reflective role across all organisational boundaries²⁴, and PR measurement and evaluation needs to match this practice - adopting an open-systems evaluation approach. Bearing in mind the reflective function PR plays in this framework, the PR function can best enhance systemic viability when it relates information as actionable insights when reporting on its efforts.

Robust and interpretative insight reports are one of the major ways in which PR can display its impact as organisational function. Insights, as defined by Swenson *et al.* (2019:9) are defined as “new learnings of significant consequence to an organisation, based on meaningful interpretation of research”. PR practice that provides management with reports which translates information to insights was found to be one of two major components of communication excellence in the 2018 *European Communication Monitor* report (IPR, 2018; Verčič & Zeffass, 2018; see also Johansson & Ottestig, 2011; Holmes, 2018). Swenson *et al.* (2019) found that providing insights to executives is a key focus area for excellent PR leaders serving in an advisory role (see Section 2.3.3.1) where they ensure that organisational priorities are considered in PR planning, thus allowing them to later translate PR success to business success. Actionable evaluation in the form of reporting on insights has also been linked to better organisational integration (see Section 2.3.1). Reporting on insights to top management is the embodiment of the reflective function of PR in organisations, for without this the PR function will not be able to prove its value (see Chapter 3 for a more detailed discussion). Reporting is the means through which environmental impacts are fed into organisational strategy-formulation processes and in doing so, the PR function makes a truly valuable contribution to organisational success.

²³ Witmer (2006:367) criticised systems theory on its inability to adequately address organisational culture.

²⁴ This has been found to be an especially important function in South Africa, often linked to the prominence of King Reporting (Rensburg, 2014).

Theoretical statement 1

The PR function contributes to systemic viability in helping organisations reach organisational goals when PR practitioners inform strategic decision-making processes and strategy formulation through reporting on insights on the organisational environment.

As stated at the beginning of this chapter, an understanding of how PR should be practiced is crucial to understanding how its value manifests and how it should be measured and evaluated to show this value. If communication is to play its part in ensuring systemic viability, it needs to be managed with purpose and to that effect. This implies a strategic approach to communication within any viable organisational system. Applying strategic communication management also determines the criteria and conditions that ultimately enable measuring and evaluating PR's value – its contribution to reaching organisational goals. A 'strategic approach' can here be broken down into three important concepts – strategy, strategic management, and strategic communication management. The following section addresses these three concepts that provide the framework for PR best practice.

2.3 Strategic communication management

2.3.1 The strategic approach to communication

In the cybernetic view, organisations function as goal-driven systems. This manifests in the application of *strategy*, defined as the “determination of the basic long-term goals and objectives of an enterprise, and the adoption of courses and action and the allocation of resources necessary for carrying out these goals” (Robbins, 1990:121). Specific to organisations, Hallahan *et al.* (2007:11) said in their seminal work on strategic communication that the term *strategic* implies that organisations and their functions are evaluated in terms of economic contribution and “rational” economic goals. In the most negative context, the word ‘strategy’ originated in warfare and still has negative connotations. It has been heavily criticised for being a modernist approach to management, assuming that management’s goals for the organisation are “given and legitimate” (Steyn, 2000c:5; Hallahan *et al.*, 2007:12; Zeffass *et al.*, 2018:201). Furthermore, it may evoke a biased, asymmetrical, and top-down communicative approach that limits the investigation of organisational communication (Hallahan *et al.*, 2007:11).

Related to this is the concept of influence – causing an effect in indirect or intangible ways (Oksiutycz, 2006; Hallahan *et al.*, 2007:24; Porter, 2010; Steyn & De Beer, 2012:31-32; Smith & Place, 2013; Steyn & Niemann, 2014; Aggerholm & Asmuss, 2016; Nothhaft, 2016:83; Verwey *et al.*, 2017; O'Connor & Shumate, 2018:400; Sieffert-Brockmann, 2018; Slabbert, 2018). Communication by organisations aids the influencing process to promote acceptance of their own ideas, maintain privilege, or regulate behaviour to their own advantage. The asymmetric practice of this (see Section 2.3.3.2) will see the organisation manipulating stakeholders for their own gain and thus sustain the critique on strategy where it cannot be assumed that management's goals for the organisation are "given and legitimate". However, the symmetric practice²⁵ of communication promotes systemic viability by aligning organisational goals with stakeholder expectations that serves both parties' interests²⁶. In this process, it influences both stakeholders and organisation leaders, builds relationships, and helps organisations gain legitimacy and trust by acting responsibly (see Section 2.4).

In the light of recent big corporate PR scandals,²⁷ the word *strategy* may have more negative connotations in a time where organisations are perceived as using their resources to manipulate their environments to their own benefit without consideration of stakeholders or society in general (see Section 2.4 on stakeholder impact).

However, the word *strategy* does not inherently or exclusively refer to an asymmetric act of manipulation for one party's benefit. Steyn's (2000a:4-6) definition of strategy as continuous decision-making or a series of choices in deciding what should be done (as opposed to simply how it should be done) and what value an organisation wants to deliver to its stakeholders, provides a more symmetrical perspective by including stakeholders. In the absence of strategy, Steyn says, subjective and intuitive decisions will be made without regarding other decisions. Thus, the term 'strategic' does not necessarily imply power and control in management practice – it also allows for participatory

²⁵ Porter (2010) criticised the symmetric approach to communication on the basis that it ignores persuasion as a core objective of PR. However, the past 10 years of PR literature has progressed well beyond the point of persuasion as core objective for PR professionals.

²⁶ This interpretation of strategy reminds of PR's reflective function once again to a certain extent, where PR exists as a reflection of the organisation's core values and role in its environment.

²⁷ Recent ethical business scandals that destroyed stakeholder relationships include the Equifax Data Breach, the #DeleteUber movement, United Airlines, the Bell Pottinger, KPMG, Steinhoff, McKinsey, Facebook data hack and the Cambridge Analytica scandal, Google's Dragonfly search engine and \$5 billion fine for abusing the Android monopoly to have their products pre-installed, Amazon's backlash for lack of transparency in splitting their headquarters (Shen, 2017; Sell, 2017; Rossouw, 2018; Siwak, 2018; Leskin, 2019). In many of these cases, strategic PR insights were used to benefit the organisation to the detriment of its stakeholders. Flaherty (2019) provides further discussion on the dangers posed by what he calls 'weaponised content'.

stakeholder communication, change management, and complex analyses of organisational environments (Grünig & Repper, 1992:117-121; Hallahan *et al.*, 2007:16; Kim, 2016; Zerfass *et al.*, 2018). This approach is echoed in the works of other authors such as Overton-De Klerk and Verwey (2013) where they discussed the paradigmatic shift in PR from modernism to post-modernism and identified *strategic communication* as the vehicle of this change.

The paradigmatic discussion of strategic communication, as it applies to PR practice and PR measurement and evaluation, could pose conflict. On the one hand, post-modernism/interpretivism in PR has brought about practices that are focused on helping organisations be mindful of their environments (so aiding viability), creating agency for stakeholders, making environmentally-conscious decisions, and navigating increasingly complex communicative environments that span over areas of organisational behaviour, ethics, accountability, and many more. On the other hand, a modernist paradigm for PR holds a more structured approach for practice and the measurement and evaluation thereof. Therefore, a paradigmatic stance that leans towards modernism may be more favourable for this study's framing of PR, considering the end-goal. However, the interpretive motivation behind actions is not cast aside (this will be discussed later in Section 2.4 and Section 3.3. again to attempt a reconciliation of these paradigmatic approaches when it comes to measurement and evaluation). This practice-based need for modernism as PR paradigm manifests in the form of strategic management, a term originating in business management literature.

In its simplest form, *strategic management* is defined as “the identification, selection and implementation of an organisation’s long-term goals and objectives” (APM, 2019). While strategy is the “logic behind actions” (Steyn, 2000a:3), strategic management generally constitutes the enactment of strategy. Freeman *et al.* (2010)²⁸, however, argues that strategy is such an integral part of strategic management that the two cannot be viewed separately, stating that strategy involves both formulation and implementation. Coulter (2010) and De Beer (2014) explored strategic management and strategic communication management as an act of value creation. Kim (2016) discussed the concept of strategy in the context of stakeholder relationships, explaining how behavioural strategic management highlights PR’s strategic role in governance. What is important for this study is that strategic management represents an open systems approach in that it enables proactive actions that lead to systemic agility, as seen where Steyn (2000a:6) states that it defines the business and its relationship with its environment. This implies that the definition of strategy is expanded to include actions taken in an organisation at several levels.

²⁸ See also Freeman *et al.* (1988).

According to Grunig and Repper²⁹ (1992:117-121; see also Holtzhausen & Verwey, 1996) strategic management takes place at *corporate/organisational* level where grand strategies³⁰ are set; at *business/specialty* level where specialised services and market segments are dealt with; and at *functional* level comprising of the PR function, managers, geographic areas and marketing, and the like. When used in conjunction with communication, strategic management implies that communication practice is a strategic function, where the PR function is involved before management decisions are made (Grunig & Repper, 1992:123; Grunig *et al.*, 2002:143, 383; Hallahan *et al.*, 2007:12; Steyn & De Beer, 2012:31; De Beer *et al.*, 2013; Nothhaft *et al.*, 2018). This is the realm of *strategic communication management*.

Literature and theory on strategic management are useful in discussing strategic communication management because these theories can translate to PR and be used to structure PR functions more efficiently – first by adopting a strategic mindset in PR, and then incorporating principles of strategic management into PR activities (see Section 2.3.2). Across all three business levels set out above then, strategic communication management in PR involves making decisions about programme goals and objectives, identifying key stakeholders, setting policies or rules to guide selection of strategies, and determining strategies (Cutlip *et al.*, 2002:138; see also Invernizzi & Romenti, 2011).

For the sake of clarity, two related terms need to be addressed before continuing this discussion – *strategic communication* and *strategic integrated communication*. These terms are so closely related to the term *strategic communication management* applied here, that they may easily be confused with one another.

The term *strategic communication* is defined as “the purposeful use of communication by an organisation to fulfil its mission” (Hallahan *et al.*, 2007:3) or “the constitutive element through which organisations make strategic decisions about network positioning and representation to stakeholders” (O’Connor & Shumate, 2018:399). It encompasses strategy and implementation. However, it spans across multiple dimensions and a multitude of perspectives have emerged from this term, including social psychology, organisational theory, business management, marketing/advertising, political communication, and more (Argenti, 2005; Werder *et al.*, 2018; also Heide *et al.*, 2018; Nothhaft *et al.*, 2018; O’Connor & Shumate, 2018; Sieffert-Brockmann, 2018). Strategic communication is established (to a larger extent) as an interdisciplinary theory. The term

²⁹ See also also Pearce and Robinson (1982), Botan and Hazleton (2006), and Grunig (2006) who makes this distinction between the levels of strategic management practice.

³⁰ See Botan and Hazleton’s (2006) distinction between grand strategy (set at policy- and decision-making level) and strategy (set at implementation level to determine goals) in the PR context.

strategic integrated communication is defined as “the strategic management process of controlling and influencing all communications, and of encouraging purposeful, data-driven interaction with external stakeholders in order to create and nourish long-term, profitable relationships” (Niemann-Struweg, 2014:184). The prior is goal-oriented and the latter relationship-centred. Overton-De Klerk and Verwey (2013:375) argued that there is a paradigmatic shift beyond integration and towards collaboration, at which point strategic communication supersedes integrated communication.

Literature on both these terms, strategic communication and strategic integrated communication, prescribe a strategic framework for approaching communication depicted, however, often only at Grunig and Repper’s corporate/organisational level (Argenti, 2005; Nag *et al.*, 2007; Freeman *et al.*, 2010; Kenworthy & Verbeke, 2015; Nothhaft *et al.*, 2018; Volk & Zerfass, 2018). This can be seen, for example, with Niemann-Struweg’s model for strategic integrated communication which shows not the practice of communication but rather how integration takes place across all business functions to the higher purpose of affecting the organisational strategy, and in many other models of integrated communication (as reviewed by Niemann, 2005).

Given the practice-oriented focus of this study, the framework of strategic communication management is primarily used because it prescribes not only a corporate/organisational level intent, but also a strong business/specialty and functional level approach to communication where measurement and evaluation takes place. It therefore provides a functional paradigm for investigation, prescribing practice across all three business levels as well as measurement and evaluation at each level. PR measurement takes place at business/specialty and functional level through various metrics, while evaluation to prove value takes place at corporate/organisation level where the effects of strategic communication management are seen (see Chapter 3). Here, at grand strategy level, PR affects policy-level decision-making about goals, alignments, ethics, and relationships with stakeholders.

The 2018 *European Communication Monitor Report* found that linking business strategy and communication is currently the second most important strategic issue for PR practitioners (IPR, 2018:46). Volk and Zerfass (2018) discusses the concept of alignment at the nexus of strategic communication and management³¹. Their view provides nuance to the concept of strategic communication management, which describes alignment in the strategic communication management process as both an ongoing process and an outcome. Under the umbrella of strategic

³¹ Gulbrandsen and Just (2016) displayed the intricate connection between the organisation and strategy in discussing who organisations become through the process of strategising communication.

communication management, many elements come together including but not limited to branding, relationship management, corporate identity, vision, organisational goals, and communication strategy – coherence between all components can only be achieved through applying various forms of alignment. While goal-alignment is a familiar concept in literature, the practice thereof is today still problematic - the 2019 *Global Communications Report* showed that there is still a misalignment between CEO and communications goals (e.g. where 44% of CEOs stated that product/service sales are their biggest goal for 2019, echoed by only 25% of PR practitioners) (USC, 2019). Alignment of top management's and PR goals are important for shaping PR's value – ensuring it contributes to reaching organisational goals. This takes place at two levels as primary and secondary alignment.

Volk and Zerfass (2018:443) distinguished between primary and secondary alignment in strategic communication management as a prerequisite for strategic communication. Primary alignment refers to the degree of alignment between the corporate strategy and the corporate communication strategy by means of intentional communication. This will be seen later in the practice of formative research (see Section 3.3.4). Secondary alignment is described as aligning communication activities with the corporate communication strategy. Primary alignment happens at grand strategy level, while secondary alignment will take place at business/specialty level. The outcome of both will then be seen in communication activities at functional level. The notion of alignment plays a major role in PR measurement and evaluation, as can be seen in research conducted by Swenson *et al.* (2019) that built on Volk and Zerfass's research, where they found that above-average performing PR departments conduct mature measurement and evaluation that serves to promote and enhance alignment or PR activities with functional business goals and other business units and priority plans. This study showed how measurement and evaluation is central to both types of alignment.

Theoretical Statement 2

In order to contribute to organisational success through strategic communication management, strategic alignment must take place:

- Primary alignment between the goals of the organisation and the goals of the PR function must take place at grand strategy level.
- Secondary alignment between the goals of the PR function and the activities conducted by the PR function must take place at business/specialty level.

The reflective role of PR described in Section 2.2 can be seen in the functional paradigm of strategic communication management and practice, where authors have called for a degree of reflection already at the start of the strategic communication management planning process. Measurement and evaluation in different forms can fulfil this function (see Section 3.3.4) and thus measurement and evaluation is already present at the start of PR best practice planning. Macnamara and Gregory (2018) argued for starting with evaluation when analysing strategic communication management.

Their discussion highlights how measurement and evaluation can inform organisational strategy and shape strategic communication management before execution. The results of the execution can be analysed and fed back to strategic communication for consideration in the next iteration, thus acting as a control loop for the sub-system. Formative and summative evaluation, as part of a strategic planning process, is crucial in creating a more dynamic and open approach to strategic communication management.

Ongoing formative research will serve to create communication goals that consider the broader organisational ecology and climate (not only a blind alignment with organisational goals), create a state of organisational listening in order to readily respond to environmental changes, and monitor the bidirectional impact of organisational behaviour. In Macnamara and Gregory's (2018) assessment, measurement and evaluation is an essential part of strategic communication management planning already. To a large extent their view confirms that a reflective framework should primarily guide PR efforts at every level, where information constantly flows between parts of the system and is interpreted to inform strategy formulation processes. Where measurement and evaluation already serves to inform the planning process of strategic communication, the reflective function of PR is reinforced and measurement and evaluation becomes an inherent part of PR best practice.

2.3.2 A model for strategic communication management

In the development of the field, academic and practice-based models³² have emerged to describe the conceptual foundation of PR best practice and the enactment of strategy. Many authors have proposed models for strategic communication management (Raupp & Hoffjann, 2012; Bochenek & Blili, 2013). Seminal works on this topic include Grunig and Repper's (1992) model for strategic communication management developed from their work on the Excellence Study³³ (see Section

³² See, for example, Brown's (2015) Modern Communications Model for governmental operations, and Gregory's (2012) book on planning and managing PR which is strongly rooted in practice.

³³ See also Wiggill (2009:61).

2.4.2) and Cutlip *et al.*'s (2002) model of four steps for PR's contribution to reaching organisational goals. Van Ruler (2003) later built on Grunig's symmetric/asymmetric dichotomy to create the Communication Grid model for strategic communication, and Volk and Zeffass (2018) created a conceptual framework for alignment of strategic communication that spans across all business functions.

To a large extent these models overlap in their basic assumptions – they aim to contribute to reaching organisational goals through strategic alignment, they assume an open-systems approach in organisations, they account strongly for stakeholders, and they incorporate symmetrical and two-way communication. Of these, Grunig and Repper's model is the only one to include every level of strategy as well as evaluation (in accordance with their take on strategic management as described in Section 2.3.1), though it was criticised by Warnaby and Moss (1997) for taking a linear approach that excludes other perspectives. These models have served the important function of establishing a baseline for strategic communication management across organisational levels, with a robust managerial foundation. In South African practice, a similar model was developed in the early 2000s. The Pretoria School of Thought led this discussion on South African strategic communication management, with Steyn and Puth's (2000) model widely accepted in South African academic literature as normative theory representing the functional paradigm. Strategically managed communication will (according to this model) take the form of a fluent, adaptable process during which the communication practitioner will continuously monitor and evaluate actions and adapt accordingly. It spans across all Grunig and Repper's levels of strategic management discussed in the previous section (corporate/organisational, business/specialty, and functional level) and as such it includes determining strategies, identifying key stakeholders, and making decisions about programme goals.

This model provides a methodical approach for practitioners to ensure communication is planned at each stage and integrates with the overall organisational goals and strategy. The strategic goal alignment, where PR goals are aligned with that of the organisation, is a crucial component of bringing about and proving the value of PR through measurement and evaluation (see Section 3.3) in this model. The model for developing corporate communication strategy furthermore strongly sustains the notion of symmetric two-way communication through environmental analyses, stakeholder emphasis, issues management, and functional implementation through goal-setting and compiling the strategic communication plan. Steyn (2000a:30) emphasised that while the model is illustrated in a linear fashion, it does not necessarily reflect linear practice since these phases often run simultaneously and are constantly revisited. Figure 2.3. illustrates a distilled and simplified representation of the model:

Analyse internal environment

- Corporate Profile: knowledge of the organisation's inner workings, location, staff, management perspectives, hierarchy, structure.
- Vision: what the organisation hopes to achieve, associated with values.
- Mission: the purpose of the organisation and its role in society, associated with behaviour.
- Corporate vision: basic assumptions of what is acceptable and what isn't.
- Corporate policy: operational guidelines for conducting business, guiding employees' thinking in implementing the organisation's strategy that consists of procedures and rules.
- Strategies: at enterprise, corporate, and business level to contextualise management decisions.

Identify internal & external strategic stakeholders and publics

- Use research to identify and define strategic stakeholders and draw up stakeholder map.
- Determine the relationship/connection between stakeholders and the organisation i.e. their effect on the organisation and vice versa.
- Identify stakeholders' familiarity i.e. a corporate image study.
- Identify key strategic issues around publics.

Identify & differentiate key strategic issues

- Identify strategic issues' impact for each public.
- Distinguish between organisational and communication issues.

Formulate the corporate communication strategy

- Decide on what to be communicated to each strategic stakeholder to solve the issues identified & classified in the previous phase.

Set communication goals

- Decide on what has to be achieved to solve the problems identified.
- Link the communication plan to the communication strategy's goals.
- Develop communication plans around these goals.

Formulate corporate communication policy

- Rooted in the organisational strategy and internal environment.
- Deals with functional relationships, communication areas, communication function's structure, goals and objectives, and guidelines for conduct.

Draft to top management

- Gain buy-in from top management to enable support of the strategy and policy.

Conduct overall media analysis

- Investigate media that may be suitable to the organisation and stakeholder.
- Establish broad guidelines on media types.

Develop strategic communication plan

- Forms part of the planning phase but acts as masterplan for strategy implementation.
- Establish a framework for programmes, campaigns, and plans.

Figure 2.3. Steyn and Puth's Model for Developing Corporate Communication Strategy

(Adapted from: Steyn, 2000a; Wiggill, 2009)

The aim of this strategic communication strategy model is to guide PR practice in contributing to organisational effectiveness (Steyn, 2000a). According to Steyn (2000a:30), this model helps to use communication to solve business problems and it can be applied in any type of organisation because it governs *thinking* as much as *doing*.

When analysing this model for practice within the context of this study, it becomes apparent that specific criteria/conditions must be met in order to enable its application. To align the organisation's internal and external environment to identify key stakeholders, issues, and risks, the PR practitioner would need access to strategic information. They would also need access to the strategic level in order to feed this information into the enterprise strategy – this sets a requirement for the role of the PR practitioner in the organisation and at what level they function. The model is furthermore built on symmetrical assumptions, encouraging two-way communication between organisations and stakeholders, its participatory problem-solving focus, and including organisational values. This requires certain conditions that is brought about through the organisation's worldview. Employing this type of symmetrical communication prescribed by the strategic communication management model would require implementing a communication model aligned with its symmetrical assumptions.

These criteria/conditions enable the model's implementation and serve to create a favourable environment for strategic communication management which ultimately also enables measurement and evaluation of the PR efforts applied.

2.3.3 Criteria and conditions of strategic communication management

2.3.3.1 Practitioner roles

The PR function's reflective role emerges throughout this chapter, where PR feeds environmental insights into organisational strategic decision-making processes. Facilitating communication at every level of strategic management, but ultimately providing value at strategic level, requires that the PR practitioner's role accommodates this kind of strategic participation. Essentially it is assumed that in generic practice, the practitioner who wishes to contribute to organisational excellence through aligning PR efforts with business goals must also function at strategic level as part of the dominant coalition and these discussions align with PR's quest for professionalism³⁴ (Steyn, 2002a; Venter, 2004; Le Roux & Steyn, 2006; Niemann-Struweg & Meintjes, 2008; Holtzhausen & Zerfass, 2011; Le Roux, 2014a; Le Roux, 2014b; Meyer & Leonard, 2014; Vieira & Grantham, 2015; Volk *et al.*,

³⁴ The term 'dominant coalition' refers to the group with decision-making power at strategic level in an organisational or structural hierarchy (Berger, 2005). It is used in this study as synonymous with 'top management' when referring to corporate hierarchical structures. See also Munslow (2016c).

2017). Findings from Swenson *et al.* (2019) and the 2018 *European Communication Monitor Report* indicated that strategic participation is still a crucial indicator of excellence in several ways – in excellent PR departments, practitioners take their advisory and executive influence very seriously and the PR practitioner functions as part of the executive board or reports directly to the CEO or top decision-maker (IPR, 2018). Furthermore, Swenson *et al.* (2019) found that evaluation influenced perceptions of practitioners, where practitioners who are able to deliver evaluation insights are more likely to be engaged earlier during management strategising. The 2019 *Global Communications Report* found that 45% of practitioners globally report at strategy level to the CEO or president, while only 50% overall reported to top management (CEO/President/Strategic planning) (IPR, 2019).

PR roles are, in literature, largely classified based on the tasks performed by the practitioner and the level at which these tasks are performed within an organisation³⁵. Roles in PR first notably appeared with Broom and Smith's (1979) identification of four roles: expert prescriber, communication facilitator, problem solving process facilitator, and communication technician. These roles, identified from Broom's research that largely centred on PR consultants to senior management, were in the following years tested, investigated, and adapted across the world for different countries' practice and different approaches.

This led to several developments – the original four roles (late 1980s) were later simplified as two categories, the manager and technician (1990s) and around this time in the US the managerial and operational roles were also defined (Dozier, 1984; Dozier, 1992; Dozier & Broom, 1995). In accordance with (or as manifestation of) the reflective cybernetic function of PR³⁶, the European boundary spanning role (1993), and the reflective role (mirror and window function, 1995) were developed. All of these roles relate to the practitioner detecting potentially impactful environmental factors and feeding it into the organisation's strategy. This reflective role is found to be more prevalent in excellent PR departments and it is becoming more important as PR practitioners move toward more strategic practices (Holtzhausen & Zerfass, 2011; Edlund, 2019; Swenson *et al.*, 2019:2). According to Swenson *et al.* (2019), the increased value placed on demonstrating the effectiveness of the PR function and its tangible contribution to reaching organisational goals makes the distinction of roles more important than ever before.

³⁵ However, Moss *et al.* (2017) found that there is no global framework for PR sizes nor PR function structures that is 'optimal'.

³⁶ Fawkes (2015) explored the reflective practice and its effect on the practitioner's professional identity, indicating how these practices are shaped by the practitioner but also how the practices shape the practitioner's identity.

Integrated roles were also identified, such as Van Ruler's finding of the "hands on manager" in the European practice (2004) that includes both planning and managerial tasks, as well as specialist roles such as the educational role and the media specialist role (2001), negotiators, policy advisors, brand officers, internal communicators, and press agents (2009) (Steyn & Butschi, 2003; Johansson & Larsson, 2015). DeSanto and Moss (2004) found distinctly different approaches in PR managerial roles compared to traditional managerial typologies, in that the PR managerial role more resembled consulting literature than management literature³⁷. Volk *et al.* (2017) recently developed a grid that associates different task sets of the PR manager with eight key roles including the ambassador, the communication strategist, the strategic manager, the advisor, the multiplier, the professional communicator, the operational manager, and the coach.

Swenson *et al.* (2019) then found that measurement and evaluation aided practitioners in advancing to an advisor role and that the coaching role aided in organisational alignment between business units. This field of inquiry is expanding as the PR landscape evolves, as is seen with Lee *et al.*'s (2015; see also Kaliyeva, 2019) research on the PR practitioner's new role as social media expert and Mikáčová and Gavlaková's (2014) case for PR practitioners as storytellers via social media³⁸. Page (2019b:8) has identified a practice-based evolution in practitioner roles among CCOs, plotted on a progression path as professional, pathfinder, and pacesetter that grows in sophistication at each step. The IPR's 2019 *Future of Work* report identified that PR professionals of the future will face disruption from the contract economy and that the pace of change is more significant than the change itself, implying that the PR function of the future will need to be highly agile and adaptable to change³⁹ (Dodd, 2019; see also Munslow, 2016b).

Initially, building on mainstream international literature, three main South African roles of the PR practitioner were empirically verified by Steyn and Puth (2000) – the technician and manager (conceptualised in the Excellence Study), and strategist (developed by Steyn). These three roles were later found to be strong indicators of PR's reflective function.

³⁷ This finding could hold interesting implications for PR measurement of value and success, and ties into Meng and Berger's (2013) findings on how leadership is approached in PR.

³⁸ See Mambadja *et al.* (2015), Cloete and Holtzhausen (2016), and Plowman and Wilson (2018) on the importance of the strategic implementation of social media, indicating an important PR subdomain. Measurement and evaluation of social media is therefore also of high importance – as will be seen throughout Section 3.6.

³⁹ Flynn (2014) also investigated the future competencies and skills that will be required from PR practitioners and highlighted the notion of agility as the practice landscape evolves. Zerfass (2018) also highlighted agility as a core competency for future PR practitioners.

In Steyn and Puth's model for strategic communication management, the communication practitioner functions at strategic level as *strategist*, analysing the organisation's internal and external environment to identify key stakeholders, issues, and risks, then decodes and feeds this information into the enterprise strategy as part of top management– the strategist acts as representative of strategic stakeholders. This task requires constant environmental scanning (gathering information on the organisation's stakeholders and issues to provide context for strategies) and boundary spanning (mediating the cybernetic organisational/environmental relationship). This role of strategist also encompasses more recent views on the changing post-modern strategic communication paradigm, such as that described by Overton-De Klerk and Verwey (2013:377) as a conceptual move away from mass communication towards “bottom-up radically open environments”. The strategist can bring about this change in the foundational shift toward strategic communication.

At functional (and modernist) level, however, the PR practitioner functions as *manager*⁴⁰ where their responsibilities include developing the communication strategy, differentiating strategic issues, deciding on messages and channels, and setting goals. Measurement and evaluation takes place at this level where measurable objectives are set and campaign performance is tracked. At implementation/operational level, the communication practitioner as *technician* develops and implements the manager's programmes and plans/campaigns (Steyn, 1999; Steyn & Puth, 2000; Steyn, 2002b; Steyn & Butschi, 2003; Venter, 2004; Butschi & Steyn, 2006; Le Roux & Steyn, 2006; Steyn, 2007; Steyn & Everett, 2009; Wiggill, 2009; Le Roux, 2010; Holtzhausen & Zerfass, 2011; Wiggill, 2011).

While these roles are generally accepted as normative and are congruent with international literature, it appeared to grow more nuanced over the following years. Yet, in terms of roles, South African PR practitioners deviate from global norms. South African PR practitioners play an especially important interpretative/reflective role to understand society and stakeholder perspectives (Van Heerden, 2004; Holtzhausen & Zerfass, 2011; Chaka, 2014; Yellowwood, 2014). Steyn and Everett (2009) refined the South African manager role into *the strategic PR manager* role and the *operational PR manager* role. Meintjes *et al.* (2009) found that South African corporate communication executives viewed themselves first as strategist, then as manager, then as technician. Tindall and Holtzhausen (2011) further found that South African PR practitioners are seldom defined by one role – instead, they often perform almost all the roles in South African literature to some degree. They identified several

⁴⁰ Drawing from management theory, DeSanto and Moss (2004:192) found that the PR manager spent very little time on strategic activities, as the role of manager is typically “technical, tactical, reactive, and frenetic in nature”, leaving managers very far away from abstract strategising or involvement in policy-making.

additional roles in South African practice - the cultural interpreter⁴¹ role (translating information across cultural boundaries for management), the liaison role (primarily a relationship building role), and the media specialist (combining the functions of the previously defined technician and media specialist roles).

However, they found that the role of strategist was the most unifying in terms of practice and theory. Their finding that the strategist role had a statistically significant relationship with all other roles indicates that South African practitioners in any role show strategic intent as a norm (Tindall & Holtzhausen, 2011:90).

Theoretical statement 3

The PR practitioner must fulfil a strategic role as part of the dominant coalition (or reporting directly to the dominant coalition) in order to access strategic information and influence strategic decisions.

It is important to note that the organisational structure can influence role availability and adoption – as organisations grow and become more differentiated, the expected roles, tasks, and structures change (Cernicova, 2016; Swenson *et al.*, 2019). Together with the reflective role that connects organisations to their environments emphasised in this section, this brings us to the second condition for strategic communication - the way the organisation views the broad picture of the environment they are operating in and how the organisation is structured, determined by the organisational worldview.

2.3.3.2 Organisational worldviews

A worldview constitutes a set of images and assumptions about the world – a macro thought indicating big, abstract structures of knowledge used to organise and make sense of the new information (Grunig & White, 1992:33-43). In PR literature different worldviews are still often described using the symmetric/asymmetric typology maintained by Grunig (1992) to account for the organisational environment.

⁴¹ This function has also been highlighted by Munslow (2016a).

According to Holtzhausen and Zerfass (2011), the organisational environment has a significant impact on strategic communication practice⁴². The organisation with an *asymmetric worldview* regards PR as mass persuasion. These organisations would typically aim to change the behaviour of stakeholders without altering their own behaviour. In this, an asymmetric worldview correlates strongly with a closed system (see Section 2.2.1). Steyn (2000c:4) holds that an asymmetrical worldview for PR opens the door (or rather steers the practitioner) onto practices that are unethical, socially irresponsible, and ineffective because they assume that the organisation knows best.

Opposing the asymmetric worldview, is the *symmetric worldview*. In organisations adopting a symmetric worldview, PR⁴³ is seen as a process of negotiation and compromise to facilitate understanding between organisations and their stakeholders (Naudé, 2001:70). In this way, organisations embody an open systems approach and can benefit more in the long run by giving up some of their own interests. An organisation like this will use dialogue and research to manage conflict and gain a thorough understanding of their stakeholders' needs and views. Through this process, relationships are built on the foundation of mutual understanding. The organisation and its stakeholders can then each be convinced to change their behaviour to benefit the other (Grunig & White, 1992; Deathrage & Hazleton, 1998; Tindall *et al.*, 2003).

Table 2.1. Characteristics of asymmetric and symmetric worldviews

Asymmetric worldview	Symmetric worldview
Internal orientation	Interdependence
Closed system	Open system
Efficiency rather than innovation	Moving equilibrium
Elitism	Equality
Conservatism	Autonomy
Tradition	Decentralised management
Central authority	Innovation
	Responsibility
	Conflict resolution
	Stakeholder liberalism

(Adapted from: Grunig & White, 1992)

⁴² Holtzhausen and Zerfass (2011:72) found in their systematic review of strategic communication management literature that homogeneity versus diversity in the organisational environment determined communication consensus and that strategic communication practice is highly sensitive to “environmental imperatives” such as cultural, social, and political systems – factors typically decided by the organisational worldview. See also Slabbert (2018) for a discussion on the role of strategic communication management to facilitate change management in organisations with different worldviews.

⁴³ It may be worth noting at this point that the question to whether communication can truly be symmetrical at all, influences the degree of influence worldview theory can have on PR practice. However, it provides a useful framework for understanding the intent in, and enabling of, strategic communication management for this study. Grunig’s mixed-motives model discussed in Section 2.3.3.3. addresses this concern in a more pragmatic fashion.

Table 2.1 shows the main assumptions for the asymmetric and symmetric worldviews. These assumptions were criticised by Deathrage and Hazleton (1998:68) for its imbalance (there are 8 assumptions for an asymmetric worldview and 13 for a symmetric worldview), and it does not represent two ends of a continuum. However, they agree with Grunig and White that corporate communication practitioners adopting an asymmetric worldview want to influence stakeholders in ways benefitting the organisation and not the stakeholders. A symmetric worldview will have mutual understanding as the primary goal for PR⁴⁴. Tying PR measurement and evaluation to organisational worldviews, research conducted by Michaelson *et al.* (2015) found that PR practitioners in proactive and innovative organisations (thus adopting a symmetric worldview) were more likely to adopt standardised measurement and evaluation practices.

A 2003 study found that PR practice in South Africa does not adopt a purely symmetrical or asymmetrical worldview (Tindall *et al.*, 2003; see also Holtzhausen, 2014). Instead, they found, South African PR practitioners choose their approach according to what each situation requires. No relationship between worldviews and PR practice could be seen. However, when Tindall and Holtzhausen (2011:91) investigated this relationship again in a later study among South African PR practitioners, they found a shift in practice. The worldview now affected certain roles of practitioners, especially that of the cultural interpreter where practitioners have to have an inclusive worldview⁴⁵ that allows them to interpret different perspectives in multicultural environments. Karsten and Illa (2005) found that Ubuntu proved to be a key African management concept, showing the relevance of localised practice to affect the core of business. Again the PR practice in South Africa is set apart from mainstream literature, as it is with the role of the PR practitioner.

Theoretical statement 4

Organisations must adopt a symmetrical worldview that supports innovation through collaboration, and allows for a participatory approach that enables dialogue with stakeholders.

⁴⁴ This discussion ties back to the brief paradigmatic discussion provided in Section 2.3.1, where modernism and post-modernism were seen to both play an important role and even needed to accommodate intent and practice.

⁴⁵ Termed “Afrocentric” worldview by Tindall and Holtzhausen (2011:81,84).

The organisational worldview largely influences the communication model employed by an organisation. The symmetrical and asymmetrical communication models display characteristics of the corresponding worldviews and determine the types of relationships an organisation forms with its stakeholders.

2.3.3.3 Communication models

Grunig and Hunt's (1984) conceptualisation of four communication models⁴⁶, based on symmetric/asymmetric assumptions, are conversely the most notable work done in explaining exactly how organisations employ communication⁴⁷. These four models, the publicity, press agency, two-way symmetrical, and two-way asymmetrical models, address the underwritten intentions of organisational communication, the corresponding practitioner roles, and the organisational worldview. The mixed motives model was later added to better reflect actual practice. It is considered the ideal for PR practice. This model is the embodiment of the cybernetic feedback loop, prescribing the reflective function and open systems approach. A typical case would see the strategic communication management framework require a two-way symmetrical⁴⁸ or mixed motives communication model in practice (Grunig & Grunig, 1992; Hamilton, 1992; Gregory, 2000; Van Ruler, 2004; Witmer, 2006; Laskin, 2009; Tindall & Holtzhausen, 2012).

Aside from guiding practice and underwriting intentions of communications, these models are especially useful in comparing PR practice across organisational, national, and cultural boundaries (Tindall & Holtzhausen, 2012). The models broadly prescribe what type of activities can be expected from the PR function, to what effect, and what outcomes can be expected.

While developed in US literature, these models have been empirically verified in many other countries (Van Ruler, 2004:124; Tindall & Holtzhausen, 2012). However, as mentioned with worldviews, South African research found no symmetric or asymmetric considerations in South African PR practice

⁴⁶ These models have not gone without critique. For example, Waddington (2019) critiqued these models for assuming the organisation at the centre of the discussion, owning control over communication and relationships. However, authors such as Xifra (2010) have found it to still hold relevance in modern communication contexts.

⁴⁷ The models discussed in this section serves the main purpose of creating foundational context – as is seen at the end of this discussion, South African PR practice deviates from these models' norms and thus it would not be of much value to utilise these models as a measurable construct. Instead, it is briefly discussed here to aid in understanding intent and what could then reasonably be expected from the PR function at a high level.

⁴⁸ Whether communication and PR can be truly symmetrical is a topic still debated among academics – see Huang (2004) for a discussion on symmetrical communication and ethics, and efficacy. Symmetric communication has also been equated to dialogue, discussed by Theunissen and Wan Noordien (2012; see also Kent & Taylor, 2002; Madichie & Hinson, 2014; Macnamara, 2017d).

(Tindall & Holtzhausen, 2011). Furthermore, Tindall *et al.* (2003) found a variety of unique African communication models such as the Ubuntu model, the Activist model, the African Dialogic model, and the Oral Communication model. The models they found were strongly oriented towards fostering African concepts of harmony in organisations. Tindall and Holtzhausen (2012) confirmed the findings from 2003⁴⁹ and confirmed that South African practitioners have a more pragmatic approach to communication models, using multiple models to communicate, dictated by the situation's needs. They then identified two new models in South African practice – the Change Agent model and the Marketing Communication model.

While it would not be feasible nor of much use to provide a detailed description of each of these models here – Tindall and Holtzhausen (2012) provides this discussion - it is very important to note that when considering PR practice, the communication model that typically predicts organisations' communicative behaviour would not be applicable to South African PR practice. In general theory, one can assume that an organisation employing a symmetrical worldview employs a symmetrical/mixed motives model. South African practice evolved to become more specialised or selective in its application of communication to accommodate local needs. The way in which South African PR practitioners select the model they require (a situational approach) does bear resemblance to Van Ruler's (2003) Communication Grid for strategic communication management (see Section 2.4.4) where the practitioner has elements of all models available to use as needed. However, Van Ruler's strategic communication management model does not provide any insights for how one would go about measuring this situational implementation of communication other than stating "...the effects of these actions must be evaluated." (Van Ruler, 2003:138).

In summation, and important to note in this specific theoretical framework, while a theoretical global framework for PR best practice exists, South African practice often differs. As was seen in this section, these differences with regards to practitioner roles, organisational worldviews, and communication models have a ripple-effect on the entire way in which PR is practiced. The implication of this is that the standardisation of practice becomes vastly more complex – naturally, the PR measurement and evaluation efforts also increase in complexity, and standardisation of PR measurement and evaluation efforts become a bit more elusive because global guidelines or prescriptions may not be applicable or relevant to the local practice.

⁴⁹ Although Niemann-Struweg *et al.* (2007) found a strong inclination toward symmetrical models in South African PR agencies which were seen to enable excellence in service delivery.

The introduction to this chapter stated that stakeholder relationships are regarded an outflow of strategic communication management adhering to the criteria/conditions set out above⁵⁰. According to O'Connor and Shumate (2018:399)⁵¹, the interconnectedness embodied by strategic communication in the functional paradigm “brings into sharp focus the constitutive role of communication in the creation, maintenance, and dissolution of complex relationships between interrelated stakeholders and organisations”. These relationships help the organisation create larger variety (as a cybernetic concept) and contribute to reaching organisational goals. The relational paradigm sees this reflective function as “contributing to organisational excellence”. Three core related aspects need to be explained in this proses: managing organisations to the benefit of stakeholders based on stakeholder theory, the outcomes of strong stakeholder relationships informed by the excellence theory, and building stakeholder relationships according to relationship management theory.

2.4 Stakeholder relationships

Bruning and Ledingham (1998:62) defined organisation-stakeholder relationships as the state between an organisation and its stakeholders where the actions of each influence the social, economic, political, or cultural wellbeing of the other. Organisations conscious of their relationships with stakeholders are managed with these relationships in mind in order to benefit the organisational system. This constitutes the relational paradigm in PR theory.

The 1980s-1990s was a rousing time in the development of PR literature and theory. During this time, the importance of organisation-stakeholder relationships truly took centre stage and theory development around this topic replaced ‘communication’ with ‘relationships’, measurement replaced ‘inputs’ with ‘outcomes’ and the value of PR was discussed from the relational paradigm.

⁵⁰ Du Plessis *et al.* (2006) ties effective PR to four factors (trust, responsibility, efficiency, and meaningful relationships) – this research provides a clear link between the functional and relational paradigms described in this chapter.

⁵¹ These authors also highlighted the ability of strategic communication to strengthen or weaken stakeholder relationships – showing a further inherent link between the functional and relational paradigms.

2.4.1 Stakeholder theory

Stakeholder theory describes the way relationships are addressed from an organisational perspective. It needs to be clarified that when organisations are managed for *stakeholders*, it stands in contrast to managing the organisation for *shareholders* and by implication, purely for profit. Of course, organisations' profitability isn't ignored (decidedly not, according to Freeman *et al.*, 2004:366).

The stakeholder theory's central argument is paying attention to the well-being of those who affect its performance and being a good corporate citizen⁵² (Freeman *et al.*, 2004:364; Elkington, 2004; Rawlins, 2006; Cheng, 2018). Stakeholder theory is nearly ingrained in the DNA of PR, to the extent that 'managing strategic relationships' has been used to define the domain of PR (Hutton, 1999, also L'Etang, 2013). Stakeholder theory places the needs of stakeholders at the forefront of organisational concern, advocating for organisations to be managed for stakeholders on whom they are dependent for their survival (Donaldson & Preston, 1995; Broom *et al.*, 1997; Jensen, 2002; Phillips *et al.*, 2003; Frandsen & Johansen, 2015).

This balance is brought about by including relevant stakeholders in strategic decision-making, using their insights to enhance value creation. By doing so it connects strategy to ethics (Donaldson & Preston, 1995; Phillips *et al.*, 2003; Freeman *et al.*, 2004; Harrison & Wicks, 2013). It also ties into the worldview dichotomy described in Section 2.3.3.2 in that dialogue is a key feature for establishing stakeholder-relationships (Bruning *et al.*, 2008), and enhances the role of PR in corporate social responsibility in its embodiment of the reflective paradigm (Clark, 2000; Frankental, 2001; Devin & Lane, 2004; Lee *et al.*, 2010; Du Plessis & Grobler, 2014; Meintjes & Grobler, 2014).

In managing organisation-stakeholder relationships to enable the value of PR, probably no one theory has done more for practice-guiding literature than the excellence theory. Explaining why stakeholder management is important and how PR contributes to reaching organisational goals through this, the excellence theory provides a unified view of PR with a strong emphasis on proving its value.

2.4.2 Excellence theory

The excellence theory was born from a research project by the *IABC Research Foundation* in 1985 which set out to answer two questions – what are the characteristics of an excellent communication department; and how does excellent PR make an organisation more effective and how much is that

⁵² In this way, it largely agrees with alternative management theories such as resource dependence theory (Casciaro & Piskorski, 2005; Hillman *et al.*, 2009).

contribution worth economically. The second part of this project essentially set out to determine the value of the PR function – especially in terms of economic value for the organisation. The findings from this study evolved to become one of the most prominent general theories of PR⁵³.

In the excellence theory, many middle range theories⁵⁴ come forward and come together: strategic management, communication models, employee communication theory, practitioner roles, gender, power, activism, ethics, and social responsibility. These all form part of this general theory of PR which says that not only does PR help organisations achieve their goals through strong stakeholder relationships, but also that strategic communication contributes to organisational excellence (Grunig, 2006a; Grunig *et al.*, 2006; Tyma, 2008; Greenwood, 2010; Laskin, 2011:155; Macnamara, 2011; Sisson, 2017; Zeffass & Viertmann, 2017).

Organisational excellence is described by Grunig and Grunig (2000:306)⁵⁵ as a state where the organisation incorporates strategic values with its strategic goals. Thus, organisational excellence is synonym to reaching organisational goals. The way in which this is brought about is a circular process relating to the cybernetic positive feedback loop (see Section 2.2). The excellence theory holds that PR is most effective when it forms part of an organisation's strategic management process. The communication function itself must then be strategically managed with symmetrical, planned, two-way communication practices to build strong stakeholder relationships. These relationships, an outflow of strategic communication management, will then aid the organisation in reaching its goals. Strong relationships with stakeholders will allow the strategic communication practitioner to feed their opinions and views into the organisational strategy – to the effect that these relationships will further strengthen and aid organisations in reaching their goals (Grunig & Repper, 1992: 117-157; Culbertson, 1993; Grunig & Grunig, 2000:307; Grunig & Kim, 2011).

Strategic communication management brings about organisational excellence in this way by establishing relationships with strategic stakeholders through planned two-way communication. PR's reflective function is then seen in incorporating stakeholder needs and perspectives into strategy formulation processes.

⁵³ According to Botan and Taylor (2004:652) it is one of the most researched co-creational theories in its field and documents its prominence in PR journals, alongside the shift to a relational approach of PR.

⁵⁴ Theories that emerge through integrating theory with empirical research, which unifies into a coherent paradigm (Charmaz, 1996:27).

⁵⁵ See also Grunig (1992:223-247).

While the Excellence Study first found an irrefutable link between organisational excellence and strategic communication, it still holds true today – the 2018 *European Communication Monitor Report* found that advisory influence of the communication function is taken very seriously by “excellent” communication departments.

Hon and Grunig (1999) prescribed six relationship building strategies as access, positivity, openness, assurance, networking, and sharing tasks. By implementing these strategies, PR practitioners build either communal or exchange relationships with stakeholders. Communal relationships are built on the premise that parties will do things for one another because they care about the other party’s welfare. Exchange relationships, in contrast, see parties providing benefits to the other and expecting something in return (Grunig, 2002)⁵⁶.

Through employing their determined relationship building strategies, organisations will benefit from the four outcomes of strong relationships which are trust, mutual control, relationship satisfaction, and commitment (Hon & Grunig, 1999). The four outcomes of strong stakeholder relationships are the test of PR’s contribution to organisational excellence.

When PR helps the organisation to form relationships with stakeholders, it reduces costs and risks for the organisation (e.g. as a result of boycotts, legislation, and pressure groups) and also increases profits for the organisation (through strong relationships with donors, consumers, and shareholders)⁵⁷ (Grunig & Grunig, 2000:308; Grunig & Grunig, 2011:5; see also Helm, 2007; Ki & Brown, 2013; Kim & Sung, 2016). Zerfass and Viertmann (2017) built on these principles and empirically verified the value of relationships to organisations by establishing four measurable value dimensions (enabling operations, building intangibles, adjusting strategy, ensuring flexibility, see Section 3.3.5).

The assumption that relationships in this way form an integral part of organisational excellence explains why strategic communication management leads to excellent organisations (as argued throughout this chapter that stakeholder relationships are an outflow of strategic communication management) (Grunig & Grunig, 2000:307). It further supports strategic communication management in that it prescribes that the PR practitioner must function at strategic level in order to establish

⁵⁶ It must be noted that the excellence theory has not escaped strong academic critique – see Waddington (2019) for a chronological outline of academic critique against this theory in modern communication as well as the authors of the theory’s responses to critique, as well as Kenny (2016). However, there is still academic discussions around its practical relevance – for a discussion on the relevance of the Excellence Theory, see Ledingham (2015).

⁵⁷ In a special edition of the *International Journal of Strategic Communication*, Kim (2012) outlines the various studies that found strong links and antecedents of organisation-stakeholder relationships and stakeholder behaviour.

stakeholder relationships (Hon & Grunig, 1999; Grunig, 2002; Lee & Evatt, 2005; Grunig *et al.*, 2006; Grunig & Grunig, 2010; Grunig & Grunig, 2011; Laskin, 2011; Verčič & Zerfass, 2016; Kang & Sung, 2017; Thurlow *et al.*, 2017). This notion is sustained in recent PR practice and academic theory, as the Global Alliance identified relationships as a key capability for PR practitioners (Global Alliance, 2016; Global Alliance 2019).

In South African PR practice, relationship-building is an exceptionally important role of the PR function – as was seen in Section 2.3.3.1 where specialist roles in South Africa emerged that are largely focused on relationship-building and using and translating stakeholder relationships to better navigate the organisational environment.

Theoretical statement 5

The PR function must establish strong organisation-stakeholder relationships in order to benefit from its outcomes and report on how it contributes to organisational excellence.

The excellence theory laid the foundation for relationship management theory that serves to sustain relationships.

2.4.3 Relationship management theory

Relationship management theory evolved mainly from stakeholder theory and operates in the relational paradigm where it also strongly relates to systems theory, two-way symmetrical communication, the excellence theory, and strategic communication management. The theory supports stakeholder theory in its principle assumption that organisations are managed *for* stakeholders and not profits and that parties' interests are balanced, but goes further to prescribe *managing* these relationships by adapting to the needs and addressing the specific needs of those whom the organisation are dependent on (Ledingham, 2003; Phillips *et al.*, 2003; Ledingham, 2009; Smith, 2009; Einwiller & Boenigk, 2012).

It correlates with the excellence theory then, where PR comprises the management function that establishes and maintains these relationships (Cutlip *et al.*, 1994:2; Dozier *et al.*, 1995:86; Ledingham, 2003:182). In this theory, the impact of PR is measured by the strength of stakeholder relationships.

Bruning and Ledingham (1998) established five operational dimensions of organisation-stakeholder relationships i.e. trust, openness, participation, investment, and commitment. These dimensions correlate with the outcomes of strong relationships established by Hon and Grunig (1999), although it places more emphasis on organisations' involvement with and investment in the community. Bruning and Ledingham (1998) investigated the relationship between these dimensions and public perceptions and found that there was a strong correlation between the dimensions that are present and the stakeholders' favourable inclination towards an organisation. They further found that the presence of these dimensions correlates with high stakeholder loyalty/legitimacy⁵⁸.

The excellence and relationship management theories' operationalisation of relationships led to several authors investigating the value of organisation-stakeholder relationships and how it can prove the value of PR. Bruning *et al.* (2004:436) found that PR practitioners can determine the success of their campaigns by using relationships to assess changes in attitudes and behaviour, rather than merely measuring communication outputs. Huntley (2006) linked relationship quality to actual sales and profitable outcomes. Botha and Van der Waldt (2011) displayed effective quantification of measuring communication's impact through stakeholder relationships, allowing managers to develop proactive plans to enhance trust, commitment, satisfaction, and mutual understanding. Holtzhausen and Fourie (2011) found a connection between employer-employee relationships in their communal relationship and the establishment's values and integrity in investigating corporate identity and relationships. Meintjes (2012) linked communication satisfaction (an outcome of strong stakeholder relationships, according to the excellence theory), to stronger organisational performance through increased employee productivity. Zerfass and Viertmann (2017) empirically proved relationships' contribution to organisational goals. From this research, it appears irrefutable that relationships constitute a viable and valuable way to gauge PR's contribution to reaching organisational goals as an outflow of strategic communication management.

However, some scholars remained sceptical of ascribing the value of PR to relationships alone. Hallahan *et al.* (2007) examined the nature of strategic communication and wholly rejected studying relationships instead of communication. Coombs and Holladay (2014) critically evaluated relationships as the value of PR and concluded that the field of enquiry has more heuristic value. Both these critics held that regarding relationships as the value of PR is too narrow and that it reduces the field to outcome variables to the detriment of other equally important aspects such as the process

⁵⁸ Legitimacy is normally established by means of a generalised perception or assumption that the actions of an entity are desirable, proper, or appropriate (Suchman, 1995:574; see also Wiggill, 2014).

through which relationships are formed, the underlying influence of communication, the importance of meaning, and the utility of relationships' application.

Harrison (2015) held a different view, critiquing the measurement of PR by the strength of relationships for the opposite reason - that the problem with using relationship-building as key measure is that it is merely a process and doesn't measure outcomes or results. Measuring relationships, according to Harrison, simply cannot translate to concrete measures which corporate executives deem important, and leaves practitioners unable to prove better business outcomes or a measurable ROI. However, his opinion does align with other critics in that he argues that measuring PR by relationships disregards the multi-faceted nature of PR. Ingenhoff and Buhmann (2016:1) also addressed this issue, stating that measuring outcomes such as image, reputation, trustworthiness or legitimacy is a demanding task because there are no manifest phenomena – it exists largely as complex intangibles that first need to be operationalised to produce meaningful results. They highlighted the fact that descriptive analyses of an organisation's image or reputation can't explain how these constructs contribute to trusting relationships, favourable stakeholder relationships, or even economic value (Ingenhoff & Buhmann, 2016:2; see also Lewis, 2001; Willis, 2015).

While this critique may be valid, and nuances in relationship management and the communication process can and should be continuously explored, the relational paradigm offers value for PR theory and practice that little other approaches have to date, if only in moving the shift for the value of PR from outputs to outcomes as suggested by Jo *et al.* (2005:14). Measuring relationships can be used as a starting point for measuring and evaluating PR efforts and the value it holds for organisations.

2.4.4 Measuring organisation-stakeholder relationships

When relationships are considered an important enabler of reaching organisational goals (in the process of practicing symmetric strategic communication management that aligns the organisation's goals and the PR function, see Section 2.3.1), then PR measurement and evaluation must work towards proving that mutually beneficial relationships were formed as a starting point for proving value. Grunig and Grunig (2011) stated explicitly that an excellent PR function cannot serve its purpose if measurement does not play an integral role. However, this concept of relationship measurement and evaluation becomes more complex when one considers the variety in the organisational environment and the intangible nature and effects of relationships.

Dozier and Ehling's (1992) theoretical discussion on PR evaluation suggests that practicing two-way symmetrical communication in order to establish strong stakeholder relationships allows for developing programme objectives that work to this end. Short-term programme measurement should

then show that objectives were met, and if each short term objective is met, it will mean that long term objectives are met (see also Lindenmann, 1999; Smith, 2002; Asibey *et al.*, 2008; Macnamara, 2008b; Anderson *et al.*, 2009; Michaelson & Stacks, 2011; Porter, 2011; Paine, 2015).

More nuanced views have emerged as Thurlow *et al.* (2017) argued that PR is organisationally and culturally situated with multidimensional effects, which must be taken into account. Thurlow *et al.* then say that measuring PR from an organisational and cultural context, not only based on achieving specific objectives, is as difficult to obtain as it is desirable. As they show, measuring PR is difficult because it is hard to capture the broader ecology of an organisation. In South African practice, this may be even more true due to increased complexity of the practice (see Section 2.3.3). The intangible benefits relationships offer also pose to be problematic – relationship dimensions and outcomes such as Bruning and Ledingham’s and Grunig’s *trust*, Zerfass and Viertmann’s value dimension of *building intangibles*, and other benefits such as loyalty, social capital, brand, reputation, silencing negative issues, and legitimacy are difficult to express in general management terminology which is often focused on more concrete proof such as profits, sales, or return on investment (see Chapter 3).

Dozier and Ehling (1992:159) confirms that, from a relational paradigm, only long-term measurement can effectively *report* on the impact of stakeholder relationships and attitudinal/behavioural changes (see also Smith, 2002; Grunig, 2008a; Grunig, 2008b; Paine, 2007; Xu, 2017). Measuring relationships and its outcomes require long-term summative assessments. Quantitative reporting on relationship outcomes without interpretation of its impact it will have little to no effect on top management (see Section 2.2.2).

In attempting to measure and evaluate organisation-stakeholder relationships, several tools have been in existence for years and new tools are still being developed (often drawing from existing measurement tools). Quantitative and qualitative relationship measurement frameworks have been published by Hon and Grunig (1999) and Grunig (2002) respectively, with thoroughly tested relationship indicators and robust measurement instruments. However, Van Dyk and Fourie (2012; also Van Dyk, F., 2014) found that these instruments’ relationship indicators are not always aligned with context-specific practice (as was the case in South Africa, according to these studies) and that these instruments, therefore, need to be adapted for the context in which they are applied. Thurlow *et al.* (2017) drew from Hon and Grunig’s work to develop the Organisational Public Relations Excellence Scale (OPRES), suggesting a measurement protocol that would indicate PR excellence rather than measuring only relationships (Thurlow *et al.*, 2017). Zerfass and Viertmann (2017) drew from the reflective and relational paradigms and identified four measurable value dimensions of communication that can be used to substantiate the value of relationships to organisations.

While proven to be valid and reliable, all of these measurement tools require resources, knowledge, and skills – the time-deprived PR practitioner fulfilling multiple roles and facing budget or resource constraints may not be able to implement these tools to their full extent in general practice, as will be seen in Chapter 3.

2.5 Conclusion

The purpose of this chapter was to determine the role of PR measurement and evaluation in PR best practice, according to established theory. It was seen that PR best practice is inextricable from PR measurement and evaluation, both in bringing about the value of PR and in proving this value. This was seen at several points in the theoretical discussion.

From the reflective paradigm it was seen that organisations that function as open systems interact with their environment and receiving feedback from, interpreting, and adapting to environmental changes is crucial to the systems' survival. In this, PR plays an important role to create requisite variety and provide strategic intelligence in its reflective role. The PR function fulfils the cybernetic control function in organisations where it reflects on itself as system and reflects environmental changes into the organisation's strategic decision-making processes through reporting on insights. PR measurement and evaluation not only aids the system's survival, but also that of the PR function.

In the functional paradigm, strategic communication management provides a framework for PR's contribution to reaching organisational goals. In this framework, the PR function's value lies in aligning PR goals with that of the organisation and aligning the organisation's communicative behaviour with that of its stakeholders. Successful PR programmes will inform its own strategic planning with formative and summative evaluation, and follow or resemble a strategic communication model that incorporates measurement and evaluation to show how change was affected at strategy level in organisations. For South African practice, it can be expected that PR practitioners will implement different South African worldviews and communication models based on the requirements of the situation at hand. This adds to the complexity of standardising measurement and evaluation due to a lack of comparable practice. This also requires the PR practitioner to function in a strategic role and employ a symmetric worldview that facilitates dialogue with stakeholders and allows for a contribution to systemic viability through facilitating the flow of information between the system and its environment. Through this symmetric enactment of strategic communication management, stakeholder relationships are formed.

Strong stakeholder relationships in the relational paradigm are regarded as an outflow of strategic communication management. The outcomes of these strong stakeholder relationships allow organisations to operate more efficiently within their environment, thus aiding organisational excellence (reaching organisational goals) through providing intangible benefits such as license to operate, trust, and cooperation. PR measurement and evaluation should report on stakeholder relationships at strategic level. Measuring the strength of stakeholder relationships requires interpretation of its impact and is largely focused on long-term outcomes such as cognitive and behavioural changes among strategic stakeholder groups. While the outcomes of strong relationships were operationalised and measurement tools to this end exist, it requires strong practitioner knowledge, skills, time, and resources to be properly evaluated if it is to be used to prove PR's value. Stakeholder relationships are one important dimension of overall PR measurement and evaluation, but it cannot accurately report on the holistic value of the PR function.

Considering PR measurement and evaluation's inherent role in best practice, the next chapter (Chapter 3) provides more insight on this topic through determining how PR measurement and evaluation is standardised in current theory and practice. This will be contextualised for the South African PR practice, which often (as seen already in this chapter) differs from global practices.

CHAPTER 3. STANDARDISATION OF PR MEASUREMENT AND EVALUATION

3.1 Introduction

Chapter 2 has shown how PR measurement and evaluation is an inextricable part of PR best practice. PR best practice is seen as an antecedent to and enabler of measurement and evaluation, its conditions enabling and predicting rigorous measurement and evaluation of PR efforts.

PR best practice serves the important function in the reflective paradigm of allowing the PR function to reflect on itself, thus improving and adjusting implementation, and reflecting environmental factors into strategic decision-making processes and strategy-formulation, thus improving the organisational system. The functional paradigm of strategic communication management describes the strategic alignment of the PR function's goals with those of the organisation. Having this shared purpose enables strategically managed PR to actively contribute to reaching organisational goals. This paradigm further prescribes (1) the criteria/conditions that enable the PR function to achieve this, (2) the strategic role of the PR practitioner, and (3) the organisation's symmetric worldview and communication model. Strategically managed PR leads to the formation of strong stakeholder relationships in the relational paradigm which substantiates the value of the PR function at a strategic level.

Building on Chapter 2's theoretical framework, the purpose of this chapter is to determine *how PR measurement and evaluation is standardised in current established theory and practice* and, in doing so, answer the second specific research question posed by this study. This chapter aims to contextualise the standardisation of PR measurement and evaluation.

Much attention has been paid to this particular dimension of PR theory over the past 50 years. This discussion will start with a cursory overview of the topic's history to understand how PR measurement and evaluation has (1) evolved to date, and (2) informed the definition of the term "PR measurement and evaluation". The topic is then explored in terms of evaluation which aims to show *value*, and measurement to show *effectiveness*. At the hand of these two concepts, the discussion takes a conceptual perspective to investigate its fundamental concepts being standardised in the reflective, functional, and relational paradigms, as well as a critical perspective to identify gaps and inconsistencies in theory and practice.

Ultimately, standardised PR measurement and evaluation will contain the core elements of each paradigm and serve to overcome gaps and inconsistencies, leading to enhanced practice.

At the time of this study PR measurement and evaluation is most prominently standardised in the form of the Barcelona Principles, a set of seven guidelines aimed at promoting and guiding best PR measurement and evaluation practice. This discussion will consider these guidelines as an embodiment of the cybernetic Viable Systems model’s control functions, aligned with the strategic communication management framework. However, because these guidelines were developed on a global stage, it will be argued that some localisation is required to make it applicable to the unique South African PR context.

3.2 History and definition of PR measurement and evaluation

Ivy Lee, considered the father of modern PR, described his work as undefinable and non-measurable – to him, PR was an art that existed only through him and thus, it was not comparable. It was propaganda pioneer Edward Bernays that established PR as an applied social science to be planned and precisely evaluated (Hiebert, 1966). Measurement and evaluation of PR efforts has a long and thoroughly discussed history, with its focus often shifting as practice evolved over the years – a process that Swenson *et al.* (2019:2) have described as “generally bumpy and glacial advancement”.

Table 3.1. History and development of PR measurement and evaluation

Timeframe	Publications and notable developments
Late 18 th century	First media monitoring practices can be identified, e.g. politicians monitoring newspapers to gather what is said about them.
Latter part of 19 th century	News cutting agencies are established in the US and UK.
1900	Publicity Bureau is established in Boston that collected newspaper clippings and developed a system for monitoring and influencing press coverage.
1932-1933	<i>American Telephone & Telegraph</i> (AT&T) showed the practice of systematically evaluating PR devices.
Late 1930s	A wide range of measurement and evaluation methods were being used by the US government to monitor and interpret media publicity.
1940s-1950s	Mass communication was effectively being measured. Most books on PR discussed measurement of volume or coverage, its length in column inches, and whether it was positive or negative media coverage (sentiment).
1948	The Institute of Public Relations (IPR) was formed in the UK by governmental communicators and from its onset it discussed evaluating PR in its <i>Journal</i> .
1949	The first warning against AVEs as measurement tool came in an edition of the IPR’s <i>Journal</i> .

Timeframe	Publications and notable developments
1950s	Measurement and evaluation awareness features in <i>Effective Public Relations</i> by Cutlip and Center (1952) being the first scholarly book to mention measurement and evaluation in PR programmes. Mostly press coverage of own and others' activities were being monitored by PR practitioners.
1958	The IPR published its first book titled <i>A guide to the practice of public relations</i> which mentioned monitoring press enquiries.
1964	German author Albert Oeckl proposed three methods of PR research which included research on media effects.
1965	Failing to conduct research as part of PR programmes was listed as a surefire way to 'fail at PR'.
1968	American Management Association published a booklet titled <i>Measuring and Evaluating Public Relations Activities</i> .
1977	First ever conference held on measuring PR effectiveness. Papers from the conference were published in the first scholarly special issue titled <i>Measuring the effectiveness of public relations</i> . A computerised program for measuring and evaluating media coverage is developed. Lindenmann carried out the first ever evaluation project to measure a PR program's effectiveness.
1979	A media measurement system is developed by Lindenmann to measure outcomes of communication efforts.
1982	Entrants of the Public Relations Society of America (PRSA) <i>Silver Anvil Awards</i> are required to submit evaluation data.
1983	Lindenmann published an article in the <i>Public Relations Journal</i> describing techniques to measure publicity. The <i>Public Relations Quarterly</i> published a special issue summarising how the academic community and practitioners were conducting PR measurement and evaluation. A study among American PR practitioners found that more than half of practitioners expressed a fear of being measured.
1984	CARMA International was formed, a company specialising in computerised measurement of publicity effectiveness. <i>Public Relations Review</i> issued a special edition on measuring PR impact.
Mid 1980s	Numerous scholarly articles appeared on measuring PR, including articles by authors Broom, Cline, Dozier, Grunig, and Wright. The Excellence Study showed PR's value as its contribution to organisational excellence through stakeholder relationships, and tools for measuring relationships were beginning to develop based on this study's findings.
1987	An article appeared in <i>Marketing News</i> entitled <i>There is a method for measuring PR</i> that described Paine's first publicity measurement system.
1988	Lindenmann conducted a study among American PR practitioners and found that most measurement is casual and informal and that it is not conducted by people trained in research.
1990	Another issue of <i>Public Relations Review</i> was devoted to PR measurement tools and techniques, titled <i>Using research to plan and evaluate public relations</i> . Broom and Dozier's book <i>Research Methods in Public Relations</i> emphasised the need for PR to be evaluated.
1993	The Institute for Public Relations Research released a seminal study describing tools and techniques used in the industry to plan for and measure PR. The first UK consultancy (then named Countrywide Communications, now Porter Novelli) gained Quality Assurance (QA) process standards recognition.

Timeframe	Publications and notable developments
1994	<p>The International Public Relations Association (IPRA) published a booklet titled <i>Public Relations Evaluation: Professional Accountability</i>. The IPRA confirmed world-wide recognition of the importance of research for measurement and evaluation of PR.</p>
Late 1990s	<p>Extensive national campaigns were launched to promote best practice in PR measurement and evaluation, with the US widely using Lindenmann's paper establishing the terminology of three stages of evaluation – output, uptake and outcome.</p>
1995	<p>Paine published an article in <i>Public Relations Tactics</i> explaining how the effectiveness of online announcements and promotional materials can be measured.</p>
1996	<p>The International Association for Measurement and Evaluation of Communication (AMEC) was formed as a UK trade body. Gessellschaft Public Relations Agenturen (GPRA) in Europe held a workshop on how to measure and evaluate PR effectiveness. A 'summit meeting' on PR measurement and evaluation was held in the USA, co-sponsored by the IPR. A similar meeting was held a month later in Europe (Germany), co-sponsored by the GPRA and the International Communications Consultants Organisation (ICCO). The Swedish Public Relations Association published a booklet titled <i>Return on Communications</i> summarising Swedish-based PR evaluation by academics and practitioners. Kaplan and Norton's book <i>The Balanced Scorecard</i> is published, proposing greater integration between organisational functions and that sharing Key Performance Indicators (KPIs) had an influence on PR measurement. A PR evaluation summit is held in New York to establish a uniform 'ruler' by which PR can be measured.</p>
1997	<p>The Institute for Public Relations (IPR) published a booklet titled <i>Guidelines and Standards for Measuring and Evaluating PR Effectiveness</i>. The International Committee of Public Relations Consultancies Associations (ICO) published and distributed several thousand copies of a booklet titled <i>How To Get Real Value From Public Relations: A Client Guide To Designing Measurable Communications Objectives</i>. ICO and AMEC published a booklet titled <i>The Power of the Media and How to Measure It: A Client Guide to Media Evaluation</i>, distributed widely in the USA and Europe.</p>
1998	<p>Hon published an article titled <i>Demonstrating effectiveness of public relations in the Journal of Public Relations Research</i>. The UK PR trade magazine <i>PR Week</i> launches the Proof Campaign, aimed at promoting research and evaluation by ensuring 10% of campaign budgets are devoted to it, <i>PR Week</i> then hosted an evaluation forum where the IPR, the Public Relations Consultants Association (PRCA) and AMEC agree to develop an evaluation toolkit.</p>

Timeframe	Publications and notable developments
1999	The IPR announced the formation of the US Commission on Public Relations Research and Education – their aim being to become the “arbiter of accepted standards for research and measurement relating to public relations, as well as for research and measurement in related communications disciplines that may apply... to public relations programs and activities”. This commission held its first meeting in the same year and published a booklet titled <i>Guidelines For Setting Measurable Public Relations Objectives</i> . A consortium of British organisations published a resource book titled <i>The Public Relations Research and Evaluation Toolkit: How To Measure The Effectiveness of PR</i> . Hon & Grunig effectively operationalised the outcomes of strong stakeholder relationships and published measurement instruments for measuring relationships.
Start of 21 st century	The IPR and the Commission on Public Relations Measurement and Evaluation published several papers and resource tools regarding a variety of aspects relating to PR measurement and evaluation (many of which can be found at www.instituteforpr.org).
2001	An article published by Gregory titled <i>Public relations and evaluation: does the reality match the rhetoric</i> highlighted the fact that PR measurement and evaluation are more often talked about than practiced.
2002	The IPR republished their 1997 booklet <i>Guidelines for measuring the effectiveness of PR programs and activities</i> to reflect more current practices and serve as companion to their 1999 publications.
2010	<i>The Barcelona Declaration of Measurement Principles</i> were introduced by AMEC and adopted at the 2 nd European Measurement Summit in an attempt to standardise PR measurement and evaluation.
2011	The Coalition for Public Relations Research Standards was established by the IPR, the Council of PR Firms (CPRF) and AMEC to collaboratively develop standards for measurement and evaluation in PR within the framework of the Barcelona Declaration of Measurement Principles.
2013	AMEC, the PRCA, and the ICCO launched <i>The PR Professional’s Definitive Guide to Measurement</i> , aiming to encourage more PR professionals to regard measurement as an everyday part of what they do.
2014	The MAIE model of Public Relations Measurement and Evaluation, conceptualised by Macnamara, is unveiled at the AMEC Measurement Summit.
2015	<i>The Barcelona Principles 2.0</i> was published by AMEC.
2016	AMEC’s Integrated Evaluation Framework is first published, an interactive online tool to guide practitioners in measuring their PR efforts in practice.

(Adapted from: Mapes, 1965; Fleisher & Mahaffy, 1997; Macnamara, 1999; Gregory, 2001; Kaplan & Norton, 2001; IPR, 2002; Lindenmann, 2005; Watson, 2012; AMEC, 2010a; Likely & Watson, 2013; AMEC, 2015a; Macnamara, 2015; AMEC 2016)

Table 3.1 illustrates the history and various focal points of PR measurement and evaluation over time. When mainstream PR practice was still focused on one-way publicity and press agency models (see Section 2.3.3.3), measurement and evaluation was focused on counting press clippings and monitoring media coverage. As the practice evolved to become a more dialogical two-way communicative process, measurement and evaluation became more nuanced and the focus shifted to measuring the outcomes of PR efforts: only from the 1960s onwards did measuring the *effects* of

PR enter the discussion, eventually leading to discussions on measuring the *outcomes* of PR that featured in the 1970s. In the 1980s the findings from the Excellence Study were published and, based on this, the outcomes of *relationships* were operationalised and measurement instruments were developed to measure relationships in the following years.

In 2010 a major leap towards standardisation of PR measurement and evaluation came in the form of the Barcelona Declaration of Measurement Principles which strongly emphasised measurement and evaluation of outcomes to prove PR impact. Taken collectively, this journey puts forward a vision of practice that understands and recognises the importance of PR measurement and evaluation, with the ability to improve current practices. However, the vision is tempered with concurrent findings that show the practice of PR measurement and evaluation is evolving slowly (see Section 3.2.1, Section 3.4, Section 3.5, and Section 3.6.4).

PR measurement and evaluation is often used as a unifying term to denote the strategic communication management impact of PR efforts. The Institute for Public Relations (IPR) defines PR measurement and evaluation as “all research designed to determine the relative effectiveness or value of what is done in PR” (IPR, 2002:2).

This definition contains two important concepts – *value* and *effectiveness*. Value in the strategic communication management framework, as was stated in Theoretical Statement 1 (see Section 2.2), comprises PR’s contribution to reaching organisational goals. This is done through aligning PR goals with organisational goals. Effectiveness featured in many other definitions of the term over the years, generally defined as a systematic process of measuring programme effectiveness by comparing the result to pre-set objectives (Pavlik, 1987; Lindenmann, 1993; Cutlip *et al.*, 1994; Gurgu & Cociuban, 2017; Buhmann & Likely, 2018).

Buhmann and Likely (2018:2) address the concepts of value and effectiveness in their distinction between measurement and evaluation in the strategic communication management context:

Measurement comprises (quantitative and qualitative) social scientific research methods to collect and analyse data as a basis for value assessments. Thus, measurement is a particular element of more general evaluation activities.

Evaluation in general is the systematic assessment of the value (merit and worth) of an object. Merit in this context means the quality of the object in that it does well that which it is supposed to do... In this view, evaluation serves two equal purposes: accountability (were objectives met?) and improvement (how were objectives met?).

Following these definitions, it is seen that measurement informs evaluation, offering subsystem- or unit analyses mostly at business/specialty and functional levels, while evaluation informed by measurement is used to show impact or value across organisational levels. Measurement, using specific metrics related to PR efforts that capture true and accurate information, should form part of PR programmes with pre-determined objectives, as part of the strategic communication management process (see Section 2.3.1). Evaluation, proving the value of measured efforts, is more difficult to attain since value often manifests in intangible ways and is more difficult to convey. Evaluation to prove value, based on true and accurate measurement metrics remains elusive to academics and practitioners alike⁵⁹.

3.2.1 Barriers to PR measurement and evaluation

Although practitioners and academics display increased interest in and positive attitude towards more sophisticated measurement and evaluation practices, a constant stream of cyclical research on these practices shows limited advances in sophistication over the past 30 years and persisting challenges (Swenson *et al.*, 2019:3). A review of research investigating this topic showed the following recurring major global barriers to PR measurement and evaluation over the past 20 years:

Table 3.2. Barriers to PR measurement and evaluation

Barrier	Cited as	Cited by
Financial	Cost / Budget constraints	Hon, 1998; Pinkleton <i>et al.</i> , 1999; Austin <i>et al.</i> , 2000; Gaunt, 2005; Xavier <i>et al.</i> , 2005; Gregory & Watson, 2008; Macnamara, 2008b; Matyak, 2009; Wright <i>et al.</i> , 2009; Macnamara, 2014; Nikolic <i>et al.</i> , 2014; Macnamara, 2015; Michaelson <i>et al.</i> , 2015; Likely, 2018; Swenson <i>et al.</i> , 2019
Time	Practitioner time constraints	Hon, 1998; Pinkleton <i>et al.</i> , 1999; Gaunt, 2005; Xavier <i>et al.</i> , 2005; Gregory & Watson, 2008; Macnamara, 2008b; Matyak, 2009; Wright <i>et al.</i> , 2009; Macnamara, 2014; Michaelson <i>et al.</i> , 2015; Levine, 2018; Likely, 2018; Swenson <i>et al.</i> , 2019
Knowledge	Lack of practitioner expertise / Lack of knowledge / Lack of understanding of social science research / Lack of training / Lack of understanding research / Right ways to do research	Hon, 1998; Gaunt, 2005; Xavier <i>et al.</i> , 2005; Watson & Noble, 2007; Gregory & Watson, 2008; Macnamara, 2008b; Macnamara, 2015; Michaelson <i>et al.</i> , 2015; Anani-Bossman & Tella, 2017; Macnamara & Zerfass, 2017; EUPRERA, 2017; Likely, 2018; Swenson <i>et al.</i> , 2019

⁵⁹ Macnamara (2005) gives a thorough account of notable studies that found PR measurement and evaluation among practitioners to be desperately lacking. Later in this chapter the recent state of this topic will be discussed again (see Section 3.4 and Section 3.5).

Barrier	Cited as	Cited by
Value	Uncertainty over what constitutes value	Hon, 1998; Gaunt, 2005; Gregory & Watson, 2008; Michaelson <i>et al.</i> , 2015; Swenson <i>et al.</i> , 2019
Understanding/ Interest	Lack of client understanding / Lack of interest from client / Lack of interest from supervisor / Lack of practitioner understanding of communication theory and relationships / Lack of employer interest	Pinkleton <i>et al.</i> , 1999; Xavier <i>et al.</i> , 2005; Austin, 2000; Macnamara, 2008b; Macnamara, 2014; Macnamara, 2015; Swenson <i>et al.</i> , 2019
Standardisation	Lack of standardised terminology / Lack of evaluation modelling	Macnamara, 2014; Macnamara & Likely, 2017; Likely, 2018

While the barriers cited in Table 3.2 have proven to be recurrent in literature and practice over the past 20 years (as discussed by Macnamara, 2017c), new barriers emerged as theory on the field expanded. Hon (1998) found a lack of personnel to impact measurement and evaluation efforts. From a strategic perspective, setting SMART goals and objectives have proven to hamper measurement and evaluation (Macnamara, 2005; Macnamara, 2008a); from a practice perspective the multi-disciplined nature of PR and the multi-step communication process was found to prevent practitioners from implementing measurement and evaluation (Macnamara, 2008a); a conflation and misunderstanding of ‘measurement’ versus ‘evaluation’ (Macnamara, 2014); an overemphasis on positivist measures and financial metrics (Macnamara, 2005; Macnamara, 2014); difficulty to distinguish between outputs versus outcomes (Macnamara, 2005), overemphasis on post-programme measurement (Macnamara, 2005); a lack of standards for measurement and evaluation practice and the myth of a “silver bullet” solution for measurement and evaluation (Macnamara, 2015). Likely (2018) found that a lack of access to research instruments or tools, organisational culture that does not support a data-driven approach, and a lack of strategic participation add to these barriers.

Challenges faced by practitioners have been investigated to provide more nuance to the discussion, as Austin *et al.* (2000) found that the barriers practitioners faced differ depending on the role they fulfil (see Section 2.3.3.1). Their research found that practitioners in technical roles faced time and training challenges, while practitioners in managerial roles faced the challenge of explaining the value of PR function and budget constraints. Mahlasela (2018) found that in South Africa, monitoring and evaluation poses a major industry challenge to PR agencies. Swenson *et al.* (2019) found that building partnerships with other business functions was a challenge for the most advanced practitioners of measurement and evaluation. Nikolic *et al.* (2014) found that a lack of time negatively correlates to conducting evaluation - an important finding from their study is that lack of time and lack

of budget hindering measurement and evaluation statistically correlated with less successful PR functions and less successful organisations.

Linking these barriers to PR evaluation with PR's contribution to excellence, Swenson *et al.* (2019) conducted an in-depth investigation among so-called excellent PR departments, showing that these barriers can be overcome. They found that more mature strategic management practices that move measurement and evaluation beyond technician-level to be paramount and that these excellent PR functions all displayed strategic alignment and reporting on insights that served to overcome common barriers found in practice. Based on these insights, they developed a generic model for overcoming the most common barriers to PR measurement and evaluation that stretches over various levels of sophistication, over different levels of maturity (Swenson *et al.*, 2019:16).

While the most common barriers (financial, time, understanding/interest, or value) will not disappear entirely for general practice (as can be seen in the fact that it has been cited in nearly 20 years' literature, and practitioners' lack of faith that their budgets will increase⁶⁰), practitioner knowledge can overcome many of these barriers to some extent⁶¹. Highlighting the crucial impact of knowledge, education, and understanding of PR measurement and evaluation to overcome barriers and move into a strategic role, Grunig (2013) said:

A public relations professional must understand how to do public relations strategically, must understand the technical operations of the organization for which he or she works, and he or she must understand research and how to conduct it and use it in day-to-day public relations. This may require pursuing a Master's degree, even on site at a university or online. It certainly requires study of strategic public relations theory.

One of the main reasons practitioner knowledge may be the best way to overcome common barriers is because practitioner knowledge is within the control of the practitioner. Many professional bodies offer measurement and evaluation courses and educational information (see Table 3.1). If the practitioner is more knowledgeable about measurement and evaluation practices, it can help them determine cost-effective ways to implement evaluation, build it into PR planning phases in order to

⁶⁰ Buhmann & Likely (2018) stated that a properly funded communication campaign is the only way to make behavioural change happen. However, in the 2019 *Global Communications Report* only 32% of participants believed their PR budget would increase in 2019 (compared to 50% in 2018) (USC, 2019).

⁶¹ Macnamara and Zerfass (2017) have indicated that the lack of practitioner skills may be the cause of the current stasis experienced in measurement and evaluation. In the South African context, Du Plooy (2006) addressed the divide between theory/research and practice and Forman (2005) emphasised the importance of educating professionals for senior management positions, while Niemann-Struweg *et al.* (2007) found that the level of practitioner education impacted the PR model applied and so also service excellence in South African PR agencies.

be more time-efficient, determine the value of their activities, and in doing so they could better communicate this value to kindle interest/understanding among top management and executives. Practitioners educated and trained in different qualitative and quantitative research methods will have a larger arsenal of research tools to determine their effectiveness and prove the value of the PR function. This point is further substantiated by Swenson *et al.*'s (2019) research – many of the excellent PR leaders they investigated held PhD degrees and all could articulate advanced research principles, but strong evaluation expertise was also found throughout every team, at every level of these excellent PR departments while the leaders of these departments worked consciously to foster a culture that hones measurement and evaluation skills⁶².

Theoretical statement 6

Practitioners consistently face financial, time, knowledge, value, interest/understanding, and standardisation as barriers to conducting measurement and evaluation. The wide range of measurement and evaluation practices required to prove value necessitates that the PR practitioner is able to conduct rigorous research:

- The PR practitioner must be educated/trained to conduct qualitative and quantitative research.
- The PR practitioner must be familiar with research best practice in order to produce reliable and valid research results across a broad spectrum of activities and platforms.
- Practitioner education/knowledge can help practitioners overcome the most common challenges.

⁶² Though this is not a new notion, as Grunig (1983) had already argued that basic research will provide knowledge that makes evaluation possible.

3.3 Evaluation paradigm for value attribution

The underlying motivation for evaluation - showing the value of the PR function - lies in the base assumptions of the reflective, functional, and relational paradigms as discussed in Chapter 2:

- *Reflective paradigm:* Evaluation determines the extent to which the PR function fulfils its role as cybernetic reflective control function and feeds environmental information into organisational strategy-formulation processes during reporting for systemic viability, and reflect on itself for the function's own accountability and viability (see Section 2.2.2).
- *Functional paradigm:* Evaluation determines how PR goals and objectives are strategically aligned with those of the organisation and how PR programmes serve to reach organisational goals (see Section 2.3). It then further informs future goal-setting and strategic alignment.
- *Relational paradigm:* Evaluation determines the establishment, impact, and quality of organisation-stakeholder relationships, as an outflow of strategic communication management, to benefit from its outcomes (see Section 2.4).

Evaluation of PR will, in the broad context of these three paradigms, determine the extent to which the PR function can act as a strategic intelligence function as part of the dominant coalition and prove the value of the PR function.

3.3.1 Evaluation in the reflective paradigm

In Chapter 2 it was concluded that PR serves to inform and support organisational strategy formulation and strategic decision-making through its cybernetic control function in the reflective paradigm. As discussed in Section 2.2.2, PR's reflective interpretation of environmental information enhances systemic viability by providing organisations with capacity for change. This systemic facilitation of PR efforts, with the ultimate aim of creating a stable organisational system capable of enduring change to reach its goals, constitutes the value of PR in the reflective paradigm.

The reflective function of PR was seen in several core theoretical concepts – in the strategic communication management framework where the goals of PR reflect that of the organisation (Section 2.3.1), in the role of the reflective PR practitioner (Section 2.3.3.1), in a symmetric organisational worldview (Section 2.3.3.2), and in the communication model applied by the practitioner (Section 2.3.3.3). It was further seen in the relational paradigm where organisations' stakeholders' perceptions are considered and accounted for in strategic decision-making processes (Section 2.4). Several authors have discussed the reflective function of PR and the European reflective perspective of roles embodies this function in its determination of the PR practitioner as boundary spanner, while South African roles theory translated this function to the practitioner's role

as strategist where environmental scanning is seen as a main function (Van Ruler *et al.*, 2001; Verčič *et al.*, 2001; Steyn & Butschi, 2003; Steyn, 2009; Johansson & Larsson, 2015). Being reflective about measurement and reporting has been cited as a direct contributor to the success of PR leaders in their organisations (Swenson *et al.*, 2019).

Working towards standardisation of evaluation practice, the reflective paradigm offers insight into how PR evaluation must be performed to ensure the organisational system’s survival (see Section 2.2.2). Standardised PR evaluation (informed by measurement activities) fulfils the *audit* control system to ensure best practice, while evaluation takes place at each business level as part of every control system. With the theoretical foundation laid up to this point, certain measurement and evaluation practices can be conceptually tied to each control function. Table 3.3 depicts what the five control systems in the Viable Systems model may look like if they are translated to the related facets of PR evaluation, informed by measurement:

Table 3.3. Conceptualisation of the Viable Systems model control functions when applied to PR measurement and evaluation practices

Cybernetic Viable Systems model Control System	PR measurement and evaluation
Operations (organisational department carrying out the work)	Technical outputs at functional level measured with true and accurate metrics
Coordination (management team guiding operations)	Targeted publications, project scheduling, determining activities at business/specialty level informed by formative evaluation
Optimisation (ensuring processes occur according to best practices)	Rigorous, reliable measurement and evaluation at business/specialty level, with true and accurate metrics
Auditing (ensuring operational processes run according to set standards)	Standardised industry measurement and evaluation practices
Strategy (guiding vision and principles of the organisation)	Aligning and informing PR efforts and organisational objectives at corporate/organisation level, through evaluation

An evaluation framework that displays these control systems, as illustrated by Table 3.3 above, provides a structured approach to standardisation for practice aligned with the functional and relational paradigms. Following this structure necessitates an open-systems evaluation approach that accommodates iterative implementation of these control systems throughout the strategic communication management process.

3.3.2 Evaluation in the functional paradigm

Realising the reflective value of the PR function requires a strategic approach (Section 2.3.1) where symmetrical PR practice is seen to further aid organisations' survival. In this functional paradigm, implementing the strategic communication approach entails that the PR practitioner will align PR goals and objectives with that of the organisation, whatever these may be. Evaluation serves to demonstrate clear links between the success in the operational domain and PR practices (Swenson *et al.*, 2019).

Authors promoting PR evaluation often start their discussions or guidelines at setting measurable goals and objectives (Lindenmann, 1993; Hon, 1998; Pinkleton & Austin, 1999; McCoy & Hargie, 2003; Lindenmann, 2006; Macnamara, 2008; Paine *et al.*, 2008; Anderson *et al.*, 2009; Wippersberg, 2009; Michaelson *et al.*, 2012; Kim & Ni, 2013; Dimitrov, 2015). From these works, it is clear that measurable goals and objectives at the start of PR planning are not negotiable if one hopes to prove the value of PR at corporate/organisation level, because it helps practitioners prove effectiveness at business/specialty level. Strategic goal alignment as a fundamental part of a strategic communication management model then promotes the PR practitioner's ability to report on the value of their efforts. Guadain (2019) made an argument for communication measurement to be a key factor for organisational strategy success. Levine (2018:17) states that enabling evaluation in the functional paradigm is about "...committing to the idea that you focus on the why behind the brief". When practitioners show this clear goal alignment it enables them to draw insights from evaluation.

Theoretical Statement 7

To ensure strategic alignment, measurable goals and objectives must be set at the start of the strategic communication management process to enable evaluation for proving value.

In order to be able to fulfil this strategic function, the strategic communication management framework prescribes the PR practitioner's role as strategist (Section 2.3.3.1) where they actively participate in strategic decision-making at corporate/organisation level. This role enables access to strategic information required to determine supportive PR goals and objectives. Furthermore, the criteria/conditions prescribed for strategic communication management for a symmetric organisational worldview and two-way communication model are important enablers to realise PR's value, as was seen in Section 2.3.3.

Strategic PR practice spans across all business levels: at corporate/organisation level where the PR practitioner participates in strategic decision-making, at business/specialty level where programmes are developed and conceptualised, and at functional level where activities are executed. The South African strategic communication management model developed by Steyn and Puth (Section 2.3.2) prescribes the entire implementation process across all business levels in this strategic approach to PR. This implementation is seldom linear - across all levels, strategic communication management is an iterative process with multiple phases running simultaneously. This multi-level implementation requires different types of evaluation at every level in order to ensure continuous linkages between strategy and operations (Buhmann & Likely, 2018:4). If strategic communication management is applied in a symmetrical way, strong organisation-stakeholder relationships follow as an outcome.

3.3.3 Evaluation in the relational paradigm

In the relational paradigm establishing strong organisation-stakeholder relationships is seen as an outflow of strategic communication management. The seminal arguments for the value of PR in the relational paradigm were put forth by Grunig's excellence theory (Section 2.4.2), posing that PR contributes to reaching organisational goals when it is strategically managed to build strong stakeholder relationships. Through employing different relationship-building strategies in the strategic communication management process, organisations benefit from the outcomes of strong relationships – trust, commitment, relationship satisfaction, and control mutuality (Grunig, 2006a; see also Jo, 2003). These outcomes of strong relationships enable PR's reflective function, enhancing systemic viability by providing a licence to operate and opportunity for easy dialogue and engagement with stakeholders (see Section 2.4.2).

Evaluation of organisation-stakeholder relationships has been operationalised and tested by many authors (Dozier & Ehling, 1992; Hon & Grunig, 1998; Kim, 2001; Grunig, 2002; Thurlow *et al.*, 2017; Zerfass & Viertmann, 2017). However, the value of these activities is seen when evaluation translates to insights and reporting on the outcomes of the strategic communication management of PR activities. Interpreting the impact of strong stakeholder relationships as part of the broad evaluative process promotes proving the value of PR when reporting at strategic level. Building relationships would, therefore, take place at business/specialty and functional level while, as in the reflective paradigm, reporting on its impact takes place at corporate/organisation level.

In the framework set out above, it was seen that PR evaluation takes place across all business levels and throughout the strategic communication management process. This necessitates different types of evaluation to inform different phases of the PR planning, execution, and reporting process.

3.3.4 Types of evaluation

Incorporating evaluation at every organisational level requires different forms of evaluation (Pinkleton *et al.*, 1999; Gregory, 2001; Smith, 2002; Van Ruler *et al.*, 2008; Wippersberg, 2009; Likely & Watson, 2013; Rensburg & Botha, 2014; Van Ruler, 2015; Macnamara, 2018; Macnamara & Gregory, 2018a). Many types of evaluation⁶³ have been identified, mostly expressed as dichotomies - of these, the formative-summative dichotomy is probably the most used evaluation typology. Scriven (1996) explained that while presented as a dichotomy, it is not mutually exclusive of other typologies such as process-outcome, research-practical, honest-dishonest, or explicit-implicit evaluation. Different types of evaluation are often expressed as linear (one follows the other), but Scriven (1996) emphasised that the type of evaluation's supremacy is determined by its relative importance as a matter of context, not logic or methodology. This allows for different types of evaluation to be applied in a truly iterative and non-linear manner across the strategic communication management process, allowing for interaction and adaption across different stages of the model employed. As such, different typologies and dichotomies are often combined in PR literature.

Combining different types of evaluation can be seen in many authored works on evaluation of strategic communication management (Gregory, 2001; Smith, 2002; Van Ruler, 2004; Wippersberg, 2009; Watson & Likely, 2013; Buhmann & Likely, 2018a; Macnamara, 2018; Macnamara & Gregory, 2018). In these works, a combination of three types of evaluation is mainly specified – *formative*, *process*, and *summative* evaluation. These types of evaluation are typically applied at different phases of the strategic communication management process, and to a specific purpose.

Formative evaluation is mostly applied with a future-oriented perspective in that it concerns preparation/planning for a specific implementation phase, and it is considered the preliminary work of every PR programme (Smith, 2002:9; Wippersberg, 2009:62; Macnamara, 2018; Macnamara & Gregory, 2018). Through formative evaluation, the PR practitioner gathers information to analyse the current situation. Gaps and needs are identified in order to reach the final goal by evaluating both the situation (external environmental factors and stakeholder identification) as well as the organisation (internal environment in terms of resources, performance, reputation, etc.). Using previous functional level measurements as benchmarks, formative evaluation provides baseline data for later comparison. However, Scriven (1996) emphasises that formative evaluation is not a form of process evaluation – as it may as well report on previous outcomes. Macnamara and Gregory (2018) emphasised this point with their assertion that previous outcome evaluation should be used to inform

⁶³ Types of evaluation are here distinguished from other evaluation classifications relating to methodology, such as qualitative-quantitative.

goal-setting already in the planning phase of communication programmes. According to Macnamara (2018:185) a lack of formative evaluation will render summative evaluation nearly impossible. Based on formative evaluation, PR efforts are determined, structured, and prepared for strategic implementation.

During strategy implementation, *process evaluation* requires the PR practitioner to monitor ongoing activities (Macnamara & Gregory, 2018). Process evaluation consists mostly of establishing baseline measurements for outputs to ensure that activities are effective in fulfilling their purpose. During this evaluation, the practitioner will often measure outputs and outcomes such as reach, message delivery, or engagement (Macnamara, 2014b; Buhmann & Likely, 2018:4). This allows for adaptation during the implementation phase of strategic communication management, adjusting tactics to ensure their effectiveness. Process evaluation fulfils a diagnostic role in executing operations and has been called by different names such as process monitoring (Wippersberg, 2009; Macnamara, 2018). While this type of evaluation is often noted with significantly less prominence than formative and summative evaluation, it is important to take note of because, to a large extent, it embodies the open-systems approach expected in the cybernetic and strategic communication management framework as it allows for much quicker corrections and is an iterative process throughout the implementation process.

Summative evaluation takes place at the end of the strategic communication management process. Building on the baseline information supplied by formative- and process evaluation⁶⁴, summative evaluation allows for assessing the effects of PR activities as well as determining whether PR goals and objectives were reached (Smith, 2002; Wippersberg, 2009; Likely & Watson, 2013; Macnamara, 2018). Inherent to summative evaluation is its ability to determine impact at corporate/organisation level. As discussed in Section 2.3.3.1 and Section 2.4.1, the reflective and relational paradigms call for translating both the environment and the outcomes of PR into actionable insights for management in order to deliver, and irrefutably show, the value of PR efforts. Summative evaluation enables reporting and translating evaluation findings into insights when it provides information on the effects and outcomes of strategic communication management and organisation-stakeholder relationships⁶⁵.

⁶⁴ Though Scriven (1996) argues that summative evaluation may often be largely or entirely process evaluation when he addresses the distinction in application of these types of evaluation.

⁶⁵ Swenson *et al.* (2019:9) found that excellent PR leaders prefer to report on these insights they'd drawn as forecasts, serving to counsel executives, rather than reporting on formative evaluation that simply show the effectiveness of a previous campaign.

While these types of evaluation seem to create a 'start-middle-end' flow, it needs to be reiterated that this is seldom the case – not according to Scriven's (1996) view on supremacy of evaluation types as mentioned at the start of this section, nor in practice. Buhmann and Likely (2018:4) and Macnamara and Gregory (2018) emphasised the fact that the strategic communication management process often takes place in iterations and disorder. Given the iterative nature of open-systems strategic communication management, other authors have called for evaluation beyond these three main types that can accommodate larger flexibility (Van Ruler, 2015). However, as Van Ruler's (2015) research has shown, introducing different, complex evaluation types to practice is extremely difficult as it usually requires strong experience, reflective practitioners who are educated in critical thinking, and exceptional awareness of professional standards and vision among all members of the team (Van Ruler, 2015:193). There may therefore be a very valid reason that PR measurement and evaluation narratives of the past strongly emphasise goal-based approaches to evaluation that employs formative-, process-, and summative evaluation to prove value (Paine *et al.*, 2008; Anderson *et al.*, 2009; Gregory, 2012; PRIA, 2015; Van Ruler, 2015).

Theoretical statement 8

Different evaluation types must be employed throughout the evaluation process to prove value:

- Formative evaluation is necessary to inform PR goal setting and to set benchmarks for comparison during process reporting and for later comparisons.
- Process evaluation is necessary to conduct ongoing monitoring of PR efforts throughout the lifespan of PR programmes, tested consistently against benchmarks set through formative evaluation.
- Summative evaluation is necessary to prove that the objectives and goals of PR programmes were met after completing a PR programme, and must be used to report insights at strategic level.
- A combination of qualitative and quantitative research methods must be used to undertake formative, process, and summative evaluation and to determine and report on changes in outcomes.

Effective evaluation across all organisational levels, implementing different types of evaluation, brings practitioners closer to determining the value of the PR function at corporate/organisation level. The question that remains to be addressed is how this value, once evaluated and determined, can be explained.

3.3.5 Evaluation according to value dimensions

The value of PR often exists as intangibles (see Section 2.4). PR strategists charged with proving the value of their efforts stand in strong competition for budgets and resources with other business functions (such as marketing) who are able to convey tangible, hard data often in the form of returns on investment (Butschi & Steyn, 2006; Michaelson *et al.*, 2012; Meltwater, 2016; Buchwald & Burns, 2018; Meltwater, 2018). The intangible nature of PR places practitioners at a disadvantage when it comes down to proving, in management terms, its value. However, according to Buhmann and Likely (2018:5) the value of PR in the strategic communication management framework no longer means “a driver of organisational financial results”, but rather “the linkage of results between the results of communication and the organisation’s overall mission and strategy”.

While the value of PR has been expressed through many different rationales – reputation, trust, commitment, legitimacy, licence to operate, brand, employee productivity, loyalty, social capital, silencing negative issues, even profits and sales linked to stakeholder relationships (see Section 2.4.4), Zeffass and Viertmann (2017) distilled four interrelated value dimensions for the PR function in their theory-based framework for creating business value through PR:

- *Enabling operations*: This dimension creates tangible assets - PR creates publicity, enhances customer preferences and employee commitment.
- *Ensuring flexibility*: Through stakeholder relationships, trust, and legitimacy this dimension creates “room for manoeuvre” – giving the organisation a licence to operate.
- *Building intangibles*: This dimension creates intangible assets – PR builds reputation, brands, and corporate culture.
- *Adjusting strategy*: This dimension creates opportunities for development by establishing thought leadership, innovation potential, and crisis resilience.

According to the authors, these value dimensions serve to establish a consistent typology of values in the strategic communication management framework. The value of the PR function can be explained at the hand of these dimensions, which straddles the line between corporate management and corporate communication. As such, these dimensions show a comprehensible link between PR efforts and the organisation’s overall mission and strategy to enhance its own relevance.

The four value dimensions correlate strongly to proving value in the reflective, functional, and relational paradigms at different organisational levels. In the reflective paradigm *ensuring flexibility* and *adjusting strategy* at corporate/organisation level serve to enhance systemic viability and create a capacity for change within the organisation. Through the process of summative evaluation, the

results on the evaluation of these value dimensions will translate findings to insights. This furthers the PR function's reflective role of feeding environmental information into strategic decision-making processes and strategy formulation.

In the functional paradigm, *enabling operations* and *building intangibles* manifest at business/specialty level through strategic goal alignment, and at functional level through implementing effective tactics informed by formative evaluation and monitored through process evaluation. In the relational paradigm, *enabling operations* and *building intangibles* at corporate/organisation level are brought about through the outcomes of strong stakeholder relationships and through feeding stakeholder needs and perceptions into the organisational strategy. This is evaluated through formative evaluation when stakeholders are identified and their impact investigated, and summative evaluation where the effects of stakeholder perceptions shape organisational strategy.

This typology created by Zerfass and Viertmann shows, most prominently, that the value of PR can be both tangible and intangible, seen at corporate/organisation level as long term strategic value, as well as at business/specialty and functional levels as short-term operational value. Once this is achieved, the PR strategist can comprehensibly report on and convey the value of their efforts.

Reporting on insights, rather than outputs, is a crucial component of evaluation if its value is to be proven (Macnamara, 2014b; 2015). The PR strategist in the strategic communication management framework will report on their efforts by showing strategic goal alignment, connecting their efforts to the value dimensions of PR, and translate evaluation results into actionable insights. In doing so the PR function can improve its position in the organisational structure as a management function.

The *PR Measurement and Standard* report (2017) found that 75% of senior-level PR practitioners that implement measurement and evaluation practices focus on what they learn from data, emphasising the decisions they were able to make⁶⁶ as a result of these reviews (Henning, 2017). Senior PR practitioners' motivation⁶⁷ for measurement and evaluation alluded to environmental scanning, reinforcing the reflective role of measurement and evaluation. If PR wishes to join management ranks, Arcos (2016:269; see also Lopez-Cantos, 2015; Jörg, 2019) argued for a "PR intelligence" dimension – PR needs to display expert knowledge of its own domain (strategic

⁶⁶ Practitioners claimed that they are enabled to know where they should contribute to focus their efforts and strategically analyse what they could be doing better, set objectives, and develop strategies for improvement.

⁶⁷ Practitioners cited that "it's nice to know that the money we spend is worth it" and "it helps me monitor what's going on".

communication and relationship management) as is the case with business intelligence, market intelligence, competitor intelligence, customer insights, and other business segments⁶⁸.

However, the 2018 *European Communication Monitor Report* found that while providing information to decision-makers is a common practice for practitioners, only two thirds of respondents considered it a core task (IPR, 2018:34). This report also found reflective practice to be on the rise – as the majority of respondents indicated that their reflective task will become more important and helps them gain recognition and position themselves against other business functions. Unfortunately, this report showed that almost a third of practitioners never report to management on benchmarks, stakeholders, reputation, or brands. The far most common form of regular reporting is media monitoring reports (75%), news briefings (60%), and survey results (30%). The types of reporting have also been seen to vary greatly among different types of companies, with non-profit organisations least likely to report on insights, followed by agencies (IPR, 2018:38). Not surprisingly, given the conditions/criteria for strategic communication management, in 2018 the position of the PR practitioner influences their perception on important issues and for more senior practitioners at the head of agencies or PR departments (typically a strategic role) ranked linking business strategy and communication as the most important issue – more than any other group. The report also showed that reporting on insights is still tied to excellence (IPR, 2018:126).

PR practitioners need to provide intelligence on the organisation's environment and stakeholders but also be intelligent in its own operations. Strategic communication management should value and measure the employed resources against objectives by utilising data to decide when and how resources are allocated (Butschi & Steyn, 2006:107; Paine *et al.*, 2008:4; Paine, 2011; McKie & Heath, 2016). Measurement informs these determinations through monitoring programme effectiveness across all business levels to provide the data required for evaluative judgments. Measurement takes its place as the element of evaluation in the strategic communication management process that ultimately conveys the *effectiveness* of the PR function's activities. PR measurement and evaluation helps to answer the questions about time, effort and resources to be invested in PR activities and to determine if they can be justified (White, 1991:141).

⁶⁸ Early and Mosakowski (2011) investigated the concept of cultural intelligence, which is in the context of this discussion an important concept for the reflective PR function.

3.4 Measurement paradigm for effectiveness

Measurement entails determining the effectiveness of PR efforts using specific PR metrics at functional level where PR activities take place, and at business/specialty level where goals and objectives are set, in order to inform evaluation at corporate/organisation level. As stated in Section 3.2, measurement of PR is defined as *comprising (quantitative and qualitative) social scientific research methods to collect and analyse data as a basis for value assessments.*

In the reflective paradigm, measurement aids PR's reflective role when open-systems measurement allows the practitioner to continuously determine their effectiveness and adapt to any changes that may render their activities ineffective. This creates a greater capacity for change and enhances systemic viability. In the functional paradigm of strategic communication management, measurement will take place throughout the implementation process where activities are executed. It often relates to short term operational value in the functional paradigm. The same is true for the relational paradigm, where relationship building strategies are applied and can be continuously monitored to determine its effectiveness. Measurement uses different metrics at each level to give a precise dimension to activities' results.

3.4.1 Metrics of measurement

Metrics relate to what can be counted. PR metrics include press clippings, audience, reach, target audience reach, impressions, Opportunities To See (OTS), share of voice, cost per thousand, hits, visits, unique visitors, views, likes, followers, fans, clickthroughs, downloads, comments, tone, sentiment, engagement, influence, impact, awareness, and many more. At this point of introducing metrics to the discussion, it is nearly impossible to provide an accurate list of all PR metrics. There is a plethora of terms and metrics used, often in inconsistent and confusing ways, in PR measurement literature and practice discourse. Macnamara's (2014) analysis of measurement and evaluation showed over 30 terms in theory and practice. These span across outcome, outcome, and output levels. According to Swenson *et al.* (2019), mature measurement practice will stretch over several units of analysis which includes message/product/channel, project and campaign, organisation, society, department, and individual employee (see also Buhmann & Likely, 2018).

One of the earliest metrics of PR measurement and evaluation is monitoring media coverage. Media monitoring goes back to the start of the 1900s when the first publicity agencies were formed. It remains one of the major metrics used by PR practitioners today (Jeffrey *et al.*, 2007; Watson, 2012b; Dietrich, 2014; Mutua, 2016), despite its inability to prove real value.

The industry's struggle with measurement and evaluation continues with social media⁶⁹ – a longitudinal study of social media use by PR practitioners from 2006-2012 found that 54% measured what external publics said about them in blogs or other social media (i.e. monitoring and content analysis), but only 26% measured the impact of social media communication on the formation, change and reinforcement of attitudes, opinions, and behaviour (Macnamara, 2014b:3). With social media, vanity or output metrics such as fans, reach, or site traffic can be tracked with almost no effort – however, the challenge lies in creating valuable social media goals that will incite desired behaviour and measuring the audience conversion to the desired behaviour (Van Ruler *et al.*, 2008; Gananian, 2012; Michaelson *et al.*, 2012; AMEC, 2013; CPRRS, 2014; Macnamara, 2014b; CIPR, 2016; Amanda, 2018; Meltwater, 2018; Gesualdi, 2019; Gherghita-Mihaila, 2019). Macnamara (2006) suggested quantitative and qualitative content analyses as a well-established research methodology to measure publicity's relevance, positioning, and favourability of the message. Social media metrics must become a part of overall metrics, measured at outcome level (Grunig, 2009; AMEC, 2011; Geddes, 2012; Macnamara & Zerfass, 2012; AMEC, 2014; Paine, 2015; Vieira & Grantham, 2015; Holtzhausen, 2016).

Measurement metrics at *outcome level* relate strongly to evaluation – showing true change (IPR, 2002:4). It will answer questions about behavioural changes or changes in stakeholder opinions and attitudes. These metrics are valuable for generating insights. At *outtake level*, the impact of activities is measured – for example, determining whether the target group of the activity has comprehended and retained the message. At *output level* (the most basic and prevalent form of measurement) metrics determine surface-level success such as press coverage received or a particular message's exposure. However, the 2017 *European Communication Monitor* found most professionals still focus on lower level units of analysis like media clippings (output level) while organisational goals and intangible assets (outcome level) are ignored (EUPRERA, 2017). Swenson *et al.* (2019:10) found that excellent PR leaders refrained from reporting too often on metrics, as they felt there is danger in reporting on measures that do not directly inform strategic process – metrics thus serve to inform evaluation, but should be used sparingly in reporting⁷⁰. This study also showed that reporting on outcome metrics indicated a higher level of maturity in evaluation practice.

⁶⁹ And digital media in general, which has created a seismic shift in the practice of PR (Grunig, 2009; Crenshaw, 2018).

⁷⁰ Stockel (2018) makes a case for the importance and relevance of proper metrics, and how they can help generate insights which shouldn't be overlooked (though crucial to her argument is strategic alignment and environmental scanning). See also Buhmann and Likely (2018).

Metrics at all three levels can properly inform evaluation and be used for better decision-making if measurement is applied as an iterative process throughout the strategic communication management process. Table 3.4 illustrates some of the common metrics across these three levels:

Table 3.4 Common metrics across levels of measurement

Output level metrics	Outtake level metrics	Outcome level metrics
Counting press clippings	Unique visitors	Engagement
Audience size	Views	Influence
Reach	Likes	Impact
Impressions	Followers	Awareness
Opportunities to see	Fans	Attitudes
Share of voice	Clickthroughs	Trust
Hits	Downloads	Return on Investment (ROI)
Visits	Comments	Reputation
Cost per thousand	Tone and sentiment	Relationships

(Source: Macnamara, 2014b)

PR measurement metrics have a clear place in the theoretical paradigm where it serves to establish the effectiveness of activities and a baseline for evaluation. AMEC (2019) moved towards emphasising the importance of mature measurement with its publication of the online Measurement Maturity Framework. However, it has come under severe academic crossfire in recent years (Xavier *et al.*, 2005; Grunig, 2006b; Baskin *et al.*, 2010; Michaelson & Stacks, 2010; Boersma & Bowen, 2012; Macnamara, 2014a; Macnamara, 2014b; Macnamara, 2015; Paine, 2015; Smith, 2017; Waddington, 2018; Kabucua *et al.*, 2016; Watson, 2011; Watson, 2012b; Gurgu & Cociuban, 2017; Harris, 2017; Van Dyk & Ingham, 2017; Sims, 2018). The two biggest problems with PR measurement metrics seem to be semantic inconsistency, and dominating output measures.

First, semantic inconsistency is an ongoing issue that impacts comparable measurement. A critical analysis of PR measurement metrics by Macnamara (2014a) found a significant lack of consistency and agreement on even the most basic of metrics in terms of their nature and definitions in practice and theory. Many other authors have come to the same conclusion (Watson, 2005; Gregory & Watson, 2008; Stacks & Bowen, 2013; AMEC, 2015a; Grunig, 2015; Michaelson *et al.*, 2015; Dietrich, 2016; Goodwin, 2017; Macnamara & Likely, 2017) and agree that the incoherence of metrics across theory and practice is a significant barrier to PR measurement and evaluation, sowing general confusion rather than guiding practice. This issue is also prevalent in measurement and evaluation models, as will be seen in Section 3.5.

Second, metrics that do not show true change at outcome level (in stakeholder behaviour, perceptions, knowledge, or attitude) to help the organisation reach its goals, have been definitively discredited (Xavier *et al.*, 2005; Macnamara, 2015; Paine, 2015), yet remains in practice where there is a strong persistence of output metrics. These metrics are called *vanity metrics*, referring to the fact that they often show large impressive numbers on output level, but it cannot show the effect that any of the communication had on stakeholders (see Section 3.3.4). The 2016 *Global Communications Report* (The Holmes Report, 2016:17) reported⁷¹ *reach* as the most common form of measurement by practitioners worldwide, followed by content analysis, while only some attempted to measure ROI, nearly half of participants used Advertising Value Equivalence (AVEs) as measurement metric. Three out of four of the most used metrics in practice (*reach*, content analysis, and AVEs) are purely output metrics, and the fourth metric's (ROI) use has not gone unchallenged.

Macnamara (2014a; see also Grunig, 2006b) identified the prevalence of numeric PR metrics such as ROI as another debilitating factor in PR measurement. He highlights the fundamental imbalance between measurement and evaluation – while the value of PR determined by evaluation often consists largely of intangibles, measurement metrics try to quantify PR activities. He argues that a positivist approach to measurement, applauded by management, is preventing the practice to see the value in social science research – using qualitative research to understand human communication and relationships. Swenson *et al.* (2019:4) highlighted that many practitioners still only focus on output-level metrics, often at the expense of outcome-level metrics and even though PR objectives were set, and that this hampers moving the practice of measurement from moving forward.

Two metrics that are most prominent in practice and most problematic in theory are ROI and AVEs. Because these two metrics most closely reflect practice and their use has significant implications for PR measurement and evaluation, they will be briefly overviewed next to determine what the implications of their use are, intended to deepen this discussion's understanding of measurement metrics in practice.

⁷¹ The subsequent *Global Communication Reports* (2017 or 2018) did not report on measurement metrics, though the 2017 *Global Communication Report* (The Holmes Report, 2017:22) made a single reference to evaluation, indicating that 77% of practitioners feel they can increase the value of PR within their organisation through demonstrating how PR achieves business results and not through measurement.

3.1.1.1 Return on Investment (ROI)

Return on Investment (ROI) is usually defined in management and marketing literature as a measure of financial effectiveness, concerned with the returns on capital employed in business (profit-making) activity (Watson, 2011; Meltwater, 2017; Heald, 2018). The *Dictionary of Public Relations Measurement and Research* (Stacks & Bowen, 2013) defines ROI as “net financial investment divided by the financial investment x 100”. This will produce a percentage return rate. ROI is considered by many, especially from a management perspective, to be the ultimate metric to identify and express the value of PR⁷². Developed in financial accounting, the term’s appeal as an outcome measure indicates a financial bottom line result and is popular with senior management as it fits their management communication frame of reference. This is also the reason why ROI is problematic for PR.

First, ROI is specifically defined and understood in business and finance. According to Comcowich (2018), ROI should only be used as measurement metric when determining how various tactics have performed historically in terms of cost-efficiency. Herein lies the biggest drawback of this metric – it’s inability to scale up. While it can give data on cost-efficiency of strategies, it cannot show whether investing more money on a specific tactic will show more success. Informational emails may show a high ROI, but more email blasts may cause the audience to unsubscribe, thereby lowering the success of the tactic (Comcowich, 2018). Comcowich (2018) further warned that it may cause practitioners to overlook qualitative insight, and Lee and Yoon (2010) found that ROI was influenced by the number of activities that were executed, and the financial value thereof which creates more doubt over the accuracy of a ROI number.

Watson (2011) found that 67% of practitioners used the term ROI in planning their PR measurement and evaluation. However, in 2017 the PRCA *Digital and Communications Report* found a 10% drop in PR practitioners’ confidence to measure ROI (Harris, 2017). In 2019, Page (2019b:43) found that metrics to demonstrate ROI posed a challenge to nearly 40% of globally surveyed CCOs, while this number grew to over 65% in Asia specifically. As in the rest of the world, South African practitioners are also grappling for trustworthy ROI measures (Global Alliance, 2014:42, 47).

To accommodate the varying outcomes of PR and recognise results other than financial returns, Watson and Zerfass (2011) suggested the term quasi-ROI measures as an alternative to a purely financial ROI. These include Return on Impressions, Return on Impact Media, Return on Target

⁷² Macnamara (2014a) warns PR practitioners against too strong a positivist influence when pursuing ROI, lest the industry loses its advantage of human interpretation and perception.

Influence, and Return on Earned Media. Social Return on Investment, suggested by Macnamara (2014a:12), uses cost-benefit analyses and social accounting to calculate the value of a range of activities conducted by organisations that do not have direct financial returns. Stacks and Michaelson (2010) suggested Return on Expectations to cover non-financial metrics. However, none of these metrics answers the question of how PR value can be reliably quantified.

3.1.1.2 Advertising Value Equivalence

For years Advertising Value Equivalence (AVEs) has been commonly used as metric for measuring the alleged quantified value of PR – or, more specifically, editorial publicity (Jeffries-Fox, 2003; Macnamara, 2008a:1; Watson, 2011; Goodwin, 2017; The Holmes Report, 2017). Also referred to as ‘ad values’ or ‘ad equivalency’, AVEs are calculated by multiplying column centimetres of editorial print media coverage and seconds of broadcast publicity by the respective media advertising rates. In most applications, the media coverage is “valued” as if it were advertising, irrespective of its content and tone (Macnamara, 2008a:1). In some cases, ‘multipliers’ are applied to advertising rates based on the claim that PR is more credible than advertising and should, therefore, be valued higher. These multipliers can go as high as 13 times (some have reported up to 100 times) the equivalent media cost. AVEs calculated using multipliers are often referred to as “PR Value” (Dietrich, 2016).

A number of arguments are presented in favour of this measurement metric to justify the practice. Studies showing correlations between editorial coverage volume and outcomes such as changed attitudes or increased share prices may appear to justify the use of this metric, but no causal relationship between AVEs and outcomes have been proven (Macnamara, 2008a). It has also been noted that AVEs are seen as a ‘safety net’ metric that looks good on paper by showing a high numeric value when reporting on efforts (Goodwin, 2017). Other research found client/management demands another driving factor for its application – though this phenomenon has declined over the past years (AMEC, 2015b; Van Dyk & Ingham, 2017; ICCO, 2018).

Critique against AVEs have been published for many decades – from the first warning against it in 1949 (Watson, 2012b) to AMEC’s global crusade against AVEs called “Say No to AVEs” – continuing still in 2019 (Macnamara, 1999; CIPR, 2001; Paine, 2003; Grunig, 2006b; Michaelson & Stacks, 2006; Macnamara, 2008a; Paine, 2015; Bagnall, 2017; Gurgu & Cociuban, 2017; Macnamara, 2017; AMEC, 2018b; Monareng, 2018). The use of AVEs and multipliers have been strongly condemned by most professional PR bodies such as the ICCO, PRCA, AMEC, PRISA, the PRSA, and the Public Relations Institute of Australia (PRIA), chartered professionals, and leading academics in modern PR (Grunig, 2006b; Weiner & Bartholomew, 2006; AMEC, 2017a; AMEC, 2017b; Dietrich, 2016; Goodwin, 2017; Smith, 2017; AMEC, 2018a; Macnamara, 2018; Waddington, 2018). Critique on this

metric mostly centres around its flawed assumption that PR is the same as advertising, and its output level focus. AVEs go no way in proving the value of PR in terms of relationships, cognitive short term outcomes, or behavioural long-term outcomes and as such, they cannot contribute meaningfully to evaluation efforts. The use of this flawed and outlawed metric is very much prevalent today still. The 2018 *World PR Report* found 52% of practitioners worldwide are using AVEs and in Africa this number rises to 72%, despite PRISA's (2017) warnings against it. PRISA (2017) also stated that the majority of South African PR practitioners are using AVEs. However, still in 2018, Africa has shown significantly higher use of AVEs, as well as client/management demand for it, than the global average (ICCO, 2018; see also Mutua, 2016).

The CIPR (2001) suggested 'Opportunities To See' (OTSs) as alternative "quick-hit" metric, but most discussions argue for more sophistication in measurement rather than aiming to suggest an alternative to AVEs (Macnamara, 2014b; AMEC, 2017). Measuring the intangible outcomes of PR is, however, vastly more complex. Studies have found that practitioners often shy away from this complexity and default to vanity metrics – most citing lack of knowledge and expertise and budget constraints as hindrances to implementing the sophistication required to measure intangible PR outcomes (Watson & Noble, 2007; Baskin *et al.*, 2010; Macnamara, 2015; The Holmes Report, 2016; Macnamara & Zeffass, 2017). Even implementing a commonly proposed outcome metric such as sentiment analyses would require in-depth, costly, and time-consuming research – sentiment analysis that yields insights would, for example, require multiple sources of information from social media, review sites, search engine results, business listings, and survey data in multiple forms (Reputation.com, 2019).

The discussion on PR measurement metrics raises the following concerns:

1. Practitioners continue to use output-only metrics such as reach, instead of focusing on business impact and PR's contribution to reaching business goals.
2. While ROI may be a valid metric that shows business impact, it can only do so if utilised with a proper understanding of the true financial impact, which again requires skills and knowledge that may be outside the general PR practitioner's field of expertise. Otherwise this metric poses a risk to practitioners if used improperly in that they will present invalid data.
3. The practice of using AVEs is still too large, despite widespread warnings and against using this metric.
4. Properly implementing valid outcome metrics such impact, reputation, attitudes, trust, and relationships require research skills, time, and often measurement budgets (research costs and, for example, if media monitoring software services are utilised) from PR practitioners.

The four comments made above are important for a few reasons. First, it encapsulates the seminal argument for standardisation in PR measurement metrics - in order to eliminate invalid practices and enhance evaluation to prove value. Second, it isolates the widespread practices that need to be eliminated – injudicious use of ROI and the use of AVEs. Third, it highlights key barriers to measurement that have emerged from practice and need to be compensated and accounted for in standardising this practice – practitioner knowledge of and budgets for measurement.

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AVEs and multipliers, as well as the injudicious use of ROI, are definitively discredited metrics that have to be eliminated from practice. Reliable and valid measurement metrics must be employed at all measurement levels:

- Metrics must set benchmarks for future assessments and successful activities at outcome, outtake, and output levels in order to determine effectiveness of activities and true change in outcomes.
- Social media outcome metrics must be used consistently with other media metrics.

The ideal solution would be a universal, prescriptive model for PR measurement and evaluation. To this end a variety of models have emerged from theory over the years, prescribing the measurement and evaluation process and how proving value interacts with measurement metrics.

3.5 Models for PR measurement and evaluation

Models are developed to describe broad behavioural patterns – the set of values guiding action and patterned behaviour that determines a specific approach. Modern PR measurement and evaluation models, in keeping with strategic communication management theory, consist of several stages that incorporate goal-setting, measurement, some form of review process, and extracting insights from data.

These models developed from a variety of perspectives. From a strategic management perspective emerged models such as the Pyramid model and MAIE model (Macnamara), Integrated Evaluation Framework (AMEC), PR Evaluation model (PRIA), the Reflective Communication Scrum model (Van Ruler), the PR Value Assessment (PRVA) and the Communication Controlling model (GDPR/ICV).

From the field of advertising emerged models such as the AIDA model (Lewis) or the Purchase Journey model (Koski Research). One-way persuasion models include the Domino model (Grunig & Hunt), the PR Effectiveness Yardstick (Lindenmann), or the Pii model (Cutlip, Center & Broom), while other models have emerged from an economic perspective such as the Return on Expectations and Return on Engagement models (Lindenmann, 1997; Huang, 2012; Macnamara, 2014a; Likely, 2015; Macnamara, 2016). Most models of PR measurement and evaluation developed over the past years reflected multiple stages, most structured on logic models in its most basic form. These models typically distinguish between inputs, activities, outputs, and outcomes to accommodate the strategic communication management process (Macnamara, 2016; Buhmann & Likely, 2018:6). Taking a systems approach, evaluation models often take the form of closed- or open-system evaluation. Closed-system evaluation models limit the scope of evaluation to measuring outputs in a linear order (PR Pundit, 1999; Macnamara, 2005). These models will typically accompany a one-way communication model in practice (see Section 2.3.3.3). Closed-system models often neglect environmental impacts (Macnamara, 2005; Buhmann & Likely, 2018). Existing closed system/linear models include the Pii model, Pyramid model, PR Effectiveness Yardstick, Integrated Evaluation Framework, AIDA model, Purchase Journey model, and Domino model.

Open-systems evaluation aligns with the theoretical PR best practice framework. An open-systems model correlates with two-way communication models in practice (see Section 2.3.3.3) and considers environmental data to explain the effects of a PR campaign, termed endogenous (internal) and exogenous (external) data gained through environmental monitoring and social audits. The value of these models lies in considering PR within a broader context of overall organisational effectiveness (PR Pundit, 1999; Macnamara, 2005; Macnamara, 2014a; Buhmann & Likely, 2018:11). Open systems/iterative PR measurement and evaluation is demonstrated in models such as the MAIE model, Unified Evaluation model, the PR Evaluation model, Reflective Communication Scrum model, and the Integrated Evaluation Framework.

From its beginning as simple, three-stage linear models (such as the Pii model), PR measurement and evaluation models have evolved in two ways to accommodate an open-systems approach: to circular, sophisticated, multi-stage iterations such as the Reflective Communication Scrum model⁷³ depicted in Figure 3.1, and to carefully simplified models such as AMEC's Integrated Evaluation

⁷³ The Reflective Communication Scrum (Van Ruler, 2015) is technically a PR planning model, not exclusively a PR measurement and evaluation model. However, it regards measurement and evaluation through each stage of the entire model and therefore it also functions as a model for PR measurement and evaluation.

Framework⁷⁴ depicted in Figure 3.2 that requires inputs across all levels of measurement and evaluation, with an indication of the nature of the activity (paid, earned, shared, or owned). However, both these directions of evolution showed increased sophistication in terms of borrowing from other paradigms such as program evaluation, and shifting focus from assessing communication effects to determining business impact and contributing to reaching organisational goals (Buhmann & Likely, 2018:7).

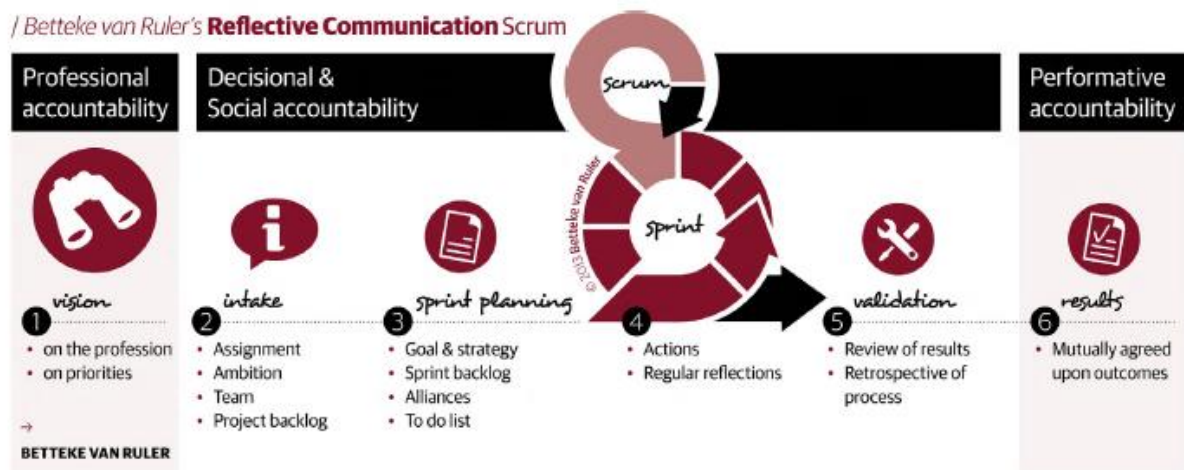


Figure 3.1 The Reflective Communication Scrum model for PR measurement and evaluation
(Source: Van Ruler, 2015)

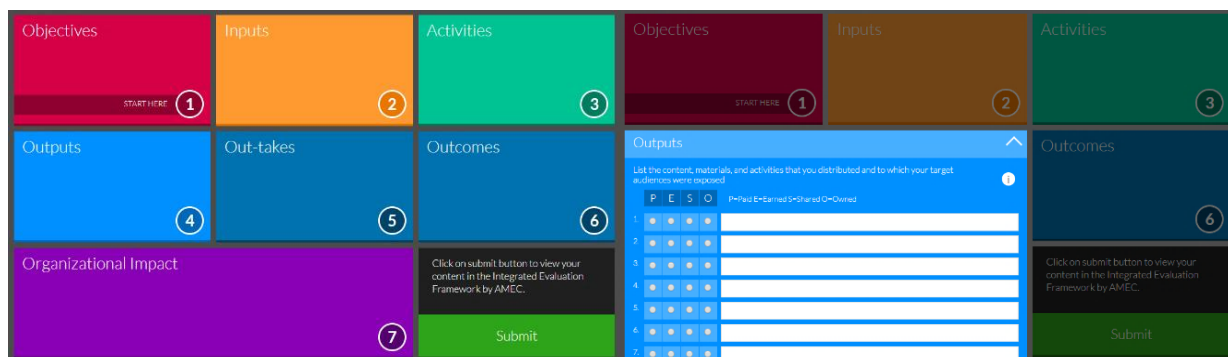


Figure 3.2 The AMEC Integrated Evaluation Framework for PR measurement and evaluation
(Source: AMEC, 2019)

⁷⁴ This model is strongly based on Dietrich's (2014b; see also Dietrich, 2018a and 2018b) conceptualisation of the PESO model for PR, outlining the PR function as a mix of activities that spans across paid, earned, shared, and owned media. This model is academically discussed as well, for example Macnamara *et al.* (2016).

Likely (2015; also see Buhmann & Likely, 2018; Macnamara, 2018) finds that the single biggest problem with existing models, as with metrics (see Section 3.4.1), is a lack of cohesion/consensus in terms of terminology and application. Current models, he argues, implement terms like outputs, outcomes, effect, impact, outgrowth, and results, in different ways to describe different stages. He states that this lack of consensus breeds confusion among practitioners. This “cacophony” has, in the view of Buhmann and Likely (2018:12), contributed to the sparse uptake of models in practice.

Simplified models such as the AMEC Integrated Evaluation Framework have aimed to eliminate this issue. However, it may be too simplified - models, meant to guide practice, should work towards enhancing cybernetic systemic viability in PR measurement and evaluation (see Section 3.3.1 and Table 3.3). Failing to do so would render them useless to standardising PR measurement and evaluation practice. Possibly in an attempt to overcome this and shift the focus toward enhancing practice, AMEC (2019) published the Measurement Maturity Mapper, an online tool that gauges the maturity of PR measurement practices, focusing on elements of reporting, planning, and demonstrating impact. Macnamara and Gregory (2018) critically reviewed the latest PR measurement and evaluation models from a strategic communication management perspective and found that these models, believed to be some of the most advanced models, lack in addressing stakeholders, do not consider formative research in setting objectives and that communication goals solely consider organisational goals due to this exclusion, and neglect to consider unintentional outcomes. They concluded that “despite a large body of evaluation literature, strategic communication as it is evolving is not well served by existing evaluation models” (Macnamara & Gregory, 2018:483). They proposed a new model of evaluation that illustrates a more integrated approach, though its uptake in practice is yet to be seen.

As was seen in Section 3.2 and Table 3.1, the move towards standardisation over the past 50 or more years progressed slowly. With heightened interest in the topic in the past few years, these efforts have culminated in a more mature framework that aims to align theory with practice, overcome barriers such as confusing terminology of metrics and models, and accommodate the variety found in PR practice.

3.6 Standardisation of PR measurement and evaluation

In the absence of an ideal theoretical model that can accommodate the variety and complexity of global PR practice, terminology, and challenges, the PR industry has moved towards *guidelines* in the quest for standardising PR measurement and evaluation. Guidelines, in contrast to a model which is typically meant to be imitated, provide flexibility to accommodate change in that it prescribes a general rule or principal only. Thus, guidelines prescribe an inclination or principle, which can be implemented according to the situation at hand. These guidelines for PR measurement and evaluation came into being in the form of the Barcelona Declaration of Measurement Principles, generally referred to as the Barcelona Principles, supposing seven principles that provide the first ever overarching framework for effective PR and communication measurement (AMEC, 2015).

3.6.1 The Barcelona Principles

The Barcelona Principles was developed to provide guidelines to measure efficacy of communication campaigns, to provide a basis to enable the replacement of outdated program measurement models, and to ultimately end years of debate as to whether metrics such as AVEs and multipliers should be used (Rockland, 2015). Rockland (2015) goes on to explain that it serves as a guide for practitioners to incorporate the ever-expanding media landscape into a transparent, reliable, and consistent framework and are foundational in that specific measurement programs with clearly stated goals can be developed from them.

AMEC (2015a:1) holds that the Barcelona Principles represent an industry-wide consensus on PR measurement and evaluation. Furthermore, the existence of the Barcelona Principles also places a responsibility on organisations making use of PR services to know and understand its foundational assumptions (Perkett, 2016). It was developed with, and supported by, a number of bodies: AMEC, the Global Alliance, the Institute for Public Relations (IPR), the International Communications Consultancy Organisation (ICCO), the Public Relations Consultants Association (PRCA), and the Public Relations Society of America (PRSA). It is also supported by additional resources created by these organisations (Gallagher, 2013; Ketchum, 2015; PRSA, 2019). The Barcelona Principles is, according to AMEC, relevant to organisations, governments, companies, and brands globally.

The first draft of the Barcelona Principles was published at the *European Summit on Measurement* in 2010. In 2015, a revised and updated draft was published after industry consultations in order to better reflect current practice (AMEC, 2012; AMEC, 2015a:2; Leggetter, 2015). The Barcelona Principles 2.0 is set out in Table 3.5:

Table 3.5 The Barcelona Principles 2.0

<p>1. Goal setting and measurement are fundamental to communication and public relations</p>
<ul style="list-style-type: none"> • Measurement and evaluation against defined goals and SMART (i.e. specific, measurable, attainable, relevant and time-bound) objectives are fundamental to good communication and PR programs. They are critical to any communication program, whether it be a single campaign or an on-going effort where the results are incremental over time. <p>Goals can be quantitative or qualitative yet should address target audience and what about them the communication program is intended to affect, how much of a change represents success, and by when this result should be achieved. This should be based on a clear understanding of the target audience including their current positions and views, as well as the context in which the program is intended.</p> <ul style="list-style-type: none"> • Measurement, evaluation and goal-setting should take a holistic approach, including representative traditional and social media; changes in awareness among key stakeholders, comprehension, attitude, and behaviour as applicable; and impact on organisational results. It should be integrated and aligned across paid, earned, shared and owned channels where possible.
<p>2. Measuring communication outcomes is recommended versus only measuring outputs</p>
<ul style="list-style-type: none"> • Outcomes include shifts in awareness, comprehension, attitude, behaviour and advocacy 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 other type of organisation. • Practices for measuring the effect on outcomes should be tailored to the objectives of the communication program. Both quantitative and qualitative methods should be used as appropriate. • Standard best practices in target audience research including sample design, question wording and order, and analysis should be applied.
<p>3. The effect on organisational performance can and should be measured where possible</p>
<ul style="list-style-type: none"> • To measure results from communication for an organisation, models that determine the effects of the quantity and quality of communication outputs on organisational metrics, while accounting for other variables, are a preferred choice. Related points are: <ol style="list-style-type: none"> a. Demand for models to evaluate the impact on target audiences of PR and communication activities in an integrated environment is significant and increasing. b. Practitioners need to understand the value and implications of integrated marketing and communication models for accurate evaluation of each channel including PR. There exists an ongoing need to develop PR measures that can provide reliable input into integrated marketing and communication models. c. Survey research can also be used to isolate the change in purchasing, purchase preference, engagement, recommendation or attitude shift resulting from exposure to communication initiatives versus other channels.

4. Measurement and evaluation require both qualitative and quantitative methods

- Tracking surveys can do a good job in measuring quantitative change in outcomes. Qualitative methods can often add a needed dimension to better explain the quantitative, and may in some cases be preferable to measuring overall results.
- Specific to the measurement of media resulting from public relations programs, overall clip counts and general impressions are generally meaningless. Instead, media measurement, whether in traditional or online channels, should account for:
 - a. Impressions among the stakeholder or target audience.
 - b. Quality of the media coverage including, but not limited to:
 - i. Tone
 - ii. Credibility and relevance of the medium to the stakeholder or audience
 - iii. Message delivery
 - iv. Inclusion of a 3rd party or company spokesperson
 - v. Prominence as relevant to the medium
 - c. Quality can be negative, positive, or neutral; the assumption should never be made that the results of a communication or public relations campaign or program are always positive or successful. Good measurement and evaluation allows for the possibility of negative or poor results from a campaign or program.

5. AVEs are not the value of communication

- Advertising Value Equivalent (AVEs) do not measure the value of PR and do not inform future activity; they measure the cost of media space or time and are rejected as a concept to value communication, media content, earned media, public relations, etc.
- Where a comparison has to be made between the cost of space or time from earned versus paid media, validated metrics should be used, stated for what they are, and reflect:
 - a. Negotiated advertising rates relevant to the client, as available;
 - b. quality of the coverage (see Principle 4), including negative results; and
 - c. physical space or time of the coverage related to 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. This also applies to “pass-along values”.

6. Social media can and should be measured consistently with other media channels

- Organisations 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 engagement, “conversation” and “communities” not just “coverage” or vanity metrics such as “likes”.

7. Measurement and evaluation should be transparent, consistent and valid

- All measurement should use valid methods and be reliable and replicable in the case of quantitative methods and trustworthy in the case of qualitative methods.
- The concepts of integrity, honesty, openness and ethics are critical to this Principle. There are a number of organisations that have set relevant standards. These include, but are not limited to nor intended to be a complete list:
 - a. Media Measurement:
 - i. Source of the content (print, broadcast, internet, consumer generated media) along with criteria used for collection.
 - ii. Analysis methodology – for example, whether human or automated, tone scale, reach to target, content analysis parameters.
 - b. Primary Research:
 - i. Methodology – sampling frame and size, response rates, margin of error, probability or non-probability, screening criteria.
 - ii. Questions – all should be released as asked (wording and order).
 - iii. Statistical methodology – how specific metrics are calculated.
 - iv. Identification of any potential biasing effects in the research itself or taking place in the broader societal context.

(Adapted from: AMEC, 2015a)

Table 3.5 shows each of the Barcelona Principles 2.0 along with its short explanation for implementation. The principles contain seven concepts pertaining to PR measurement and evaluation, prescribing best practice and offering suggestions for implementation.

The second draft of these principles showed in Table 3.5 differs from the first draft in that its emphasis moved to what should be done, rather than what should *not* be done. The revised edition further emphasised the distinction between measurement and evaluation, placed a stronger focus on qualitative research, and reinforced the need for transparent and consistent measurement and evaluation while expanding the scope to include communication, not just PR (Rockland, 2015:3). What did not change, however, was that there are still seven principles and seven primary concepts. The principles still prioritised goals/objectives and outputs, outcomes and organisational results. Quality and quantity remained, and the principles still clearly rejects AVEs and multipliers while advocating transparency (AMEC, 2015a).

Placed side by side, Table 3.6 provides a brief view of the differences between the original Barcelona Principles and the second, revised publication:

Table 3.6 Main differences between the Barcelona Principles (2010) and the Barcelona Principles 2.0 (2015)

	The Barcelona Principles (2010)	The Barcelona Principles 2.0 (2015)
1.	Importance of goal setting and measurement.	Goal setting and measurement are fundamental to communication and PR.
2.	Measuring the effect on outcomes is preferable to measuring outputs.	Measuring communication outcomes is recommended versus only measuring outputs.
3.	The effect on business results can and should be measured where possible.	The effect on organisational performance can and should be measured where possible.
4.	Media measurement requires quantity and quality.	Measurement and evaluation require both qualitative and quantitative methods.
5.	AVEs are not the value of public relations.	AVEs are not the value of communication.
6.	Social media can and should be measured.	Social media can and should be measured consistently with other media activities.
7.	Transparency and replicability are paramount to sound measurement.	Measurement and evaluation should be transparent, consistent and valid.

(Adapted from: AMEC, 2010b; AMEC, 2015a)

As can be seen in Table 3.6, these principles have moved to a more prescriptive approach, rather than a “warning” approach. The Barcelona Principles 2.0 aligns theory with practice as it shows a definitive grounding in the strategic communication management framework.

3.6.2 The Barcelona Principles as unifying framework

The Barcelona Principles appear to accommodate the reflective, functional, and relational paradigms’ prescriptions for measurement and evaluation and as such, it succeeds in its aim of providing a unifying framework for standardisation to enhance practice.

In the reflective paradigm, the Barcelona Principles 2.0 appears, to a larger extent, congruent with a viable systems conceptualisation of PR measurement and evaluation. The principles provide for four of the five control systems of the Viable Systems model, as discussed in Section 3.5.1. Table 3.7 illustrates the Viable Systems model control systems and the corresponding principles:

Table 3.7 The Viable Systems model control functions and the Barcelona Principles 2.0

Cybernetic Viable Systems model Control System	PR measurement and evaluation	The Barcelona Principles 2.0
Operations (organisational department carrying out the work)	Technical outputs at functional level measured with true and accurate metrics	Principle 4: Measurement and evaluation require both qualitative and quantitative methods. Principle 5: AVEs are not the value of communication.
Coordination (management team guiding operations)	Targeted publications, project scheduling, determining activities at business/specialty level informed by formative evaluation	-
Optimisation (ensuring processes occur according to best practices)	Rigorous, reliable measurement and evaluation at business/specialty level, with true and accurate metrics	Principle 2: Measuring communication outcomes is recommended versus only measuring outputs. Principle 6: Social media can and should be measured consistently with other media activities. Principle 7: Measurement and evaluation should be transparent, consistent and valid.
Auditing (ensuring operational processes run according to set standards)	Standardised industry measurement and evaluation practices	Principle 3: The effect on organisational performance can and should be measured where possible.
Strategy (guiding vision and principles of the organisation)	Aligning PR efforts with organisational objectives at corporate/organisation level, through evaluation	Principle 1: Goal setting and measurement are fundamental to communication and PR. Principle 2: Measuring communication outcomes is recommended versus only measuring outputs.

From Table 3.7 it can be seen that the Barcelona Principles 2.0 accommodates all functions of the Viable Systems model control system, except for coordination. This has been one of the main points of critique on the Barcelona Principles from practitioners: that the Barcelona Principles fail in closing the theory-practice gap for implementation of PR measurement and evaluation (see Section 3.6.3).

When viewed in the functional paradigm, the Barcelona Principles aligns with evaluation in the strategic communication management framework as discussed in Section 3.3.1. It corresponds to this framework in its emphasis on goal-setting (first principle), outcomes (second principle), and the effect of PR on organisational performance (third principle). It furthermore supports different types of evaluation (see Section 3.3.4) in that it advocates for both qualitative and quantitative evaluation

(fourth principle). In terms of measurement within the strategic communication management framework (see Section 3.4.1), these principles are firmly outspoken against AVEs and similar vanity metrics (fifth principle) and supports integrated measurement across platforms (sixth principle) as discussed in Section 3.4.

In the relational paradigm the Barcelona Principles, however, do not explicitly address measurement and evaluation of stakeholder relationships, relationship-building activities, or the outcomes of strong stakeholder relationships (see Section 2.4 and Section 3.3.3) in any of its drafts published to date. While it does not explicitly address relationships with stakeholders, it is not to say that they are not accommodated. As was seen in Chapter 2 (Section 2.4) and discussed here in Section 3.3.3, stakeholder relationships can be regarded an outflow of the strategic communication management process. Depending on the organisational strategy, relationship building (and therefore the qualitative or quantitative measurement and evaluation thereof) may well be implicit in the prescripts of the Barcelona Principles. As such, relationship-building activities and the outcomes of strong relationships can be measured and evaluated as part of the strategic communication management process implementing the principles. The Barcelona Principles further include stakeholder perceptions as is seen in the first principle where it emphasises stakeholder perceptions and changes and its impact on organisational results, confirming an implicit dialogic/symmetric stakeholder-approach.

Within the theoretical frameworks set out in this study, the Barcelona Principles can be broken down to the following constructs in Table 3.8 with the theoretically corresponding construct:

Table 3.8 Constructs identified from the Barcelona Principles 2.0 and theory

Theoretical paradigm/s	Construct identified in Barcelona Principles	Related theoretical construct identified in theoretical statements
1. Goal setting and measurement are fundamental to communication and public relations.		
Functional	Define SMART goals and objectives	Strategic alignment (primary) (Section 2.3.1) Goal setting informed by formative evaluation (Section 3.3.2, 3.3.4) Practitioner role (Section 2.3.3.1)
Relational	Addressing specific stakeholder groups (target audience) & effects	Evaluation types (formative evaluation) (Section 3.3.4) Symmetric worldview (Section 3.3.2) Relationship building (Section 2.4.2)

Theoretical paradigm/s	Construct identified in Barcelona Principles	Related theoretical construct identified in theoretical statements
Evaluation Measurement	Include benchmarks that will indicate success	Metrics (Section 3.4.1) Evaluation types (formative evaluation) (Section 3.3.4) Evaluation types (process evaluation) (Section 3.3.4)
Functional	Holistic approach across media, outcomes, and channels	Strategic alignment (secondary) (Section 2.3.1)
2. Measuring communication outcomes is recommended versus only measuring outputs.		
Reflective	Measuring outcomes vs outputs	Reporting insights (Section 2.2.2)
Evaluation	Qualitative and quantitative evaluation	Evaluation types (Section 3.3.4) Practitioner knowledge (Section 3.2.1)
Functional	Best practice research	Practitioner knowledge (Section 3.2.1)
3. The effect on organisational performance can and should be measured where possible.		
Functional	Measuring effect of outputs on organisational metrics	Strategic alignment (primary) (Section 2.3.1)
4. Measurement and evaluation require both qualitative and quantitative methods.		
Evaluation	Measuring quantitative change in outcomes	Evaluation types (Section 3.3.4)
Measurement	Quality media measurement	Metrics (Section 3.4.1)
5. AVEs are not the value of communication.		
Measurement	AVEs and multipliers are not acceptable	Metrics (Section 3.4.1)
6. Social media can and should be measured consistently with other media channels.		
Functional	Integrated social media measurement and evaluation	Strategic alignment (secondary) (Section 2.3.1)
Measurement	Reliable social media outcome metrics	Metrics (Section 3.4.1)
Theoretical paradigm	Construct identified in Barcelona Principles	Related theoretical construct identified in theoretical statements
7. Measurement and evaluation should be transparent, consistent, and valid.		
Reflective Evaluation	Reliable and ethical research	Symmetric worldview (Section 2.3.3.2) Evaluation types (Section 3.3.4) Practitioner knowledge (Section 3.2.1)

Applying the Barcelona Principles would, in theory, allow for standardised comparable measurement and evaluation of PR practices, allowing the practitioner to effectively report on the impact of their efforts to management using the four established value dimensions discussed in Section 3.3.5. In order to implement the Barcelona Principles, Manning and Rockland (2011) set the following practice-oriented guidelines:

- Creating a measurement budget upfront (before executing a PR strategy) that comprises about 5% of the total PR spend.
- Using business language to relate to executives.
- Creating one approach regardless of implementation locales.
- Adopting a mind-set for measuring fewer results which are more important.
- Aligning objectives for PR with that of the organisation.

Theoretical statement 10

In order to advance the field of standardised PR measurement and evaluation, PR practitioners must:

- Have a formal evaluation process in place.
- Be aware of the Barcelona Principles and its prescripts.
- Implement the Barcelona Principles in practice according to its prescripts.

These guidelines will help practitioners to implement the Barcelona Principles and promote standardised measurement and evaluation of strategic communication management. Following the publication of the Barcelona Principles (both the first and second drafts), however, practitioners and academics responded with critique on the principles, questioning its practical application.

3.6.3 Critique on the Barcelona Principles of measurement and evaluation

With the Barcelona Principles as the largest movement towards standardised PR measurement and evaluation to date, it did not go without critique from the industry. From a practitioners' perspective, it has been argued that the Barcelona Principles are vague, that the revised edition published in 2015 posed little changes other than wording, and that on its own it did not offer practical guidance or

metrics for practitioners to implement⁷⁵ (Bagnall, 2015; Dietrich, 2015; Goodwin, 2017). Wisse (2016) highlighted the issue that the Barcelona Principles' emphasis on a research-driven approach poses drastic budget requirements when research skills must be outsourced – few organisations have the necessary in-house skills and resources to conduct the intricate type of ongoing research required to produce the results the principles call for.

Goodwin (2017:45) raised the concern that the Barcelona Principles describe what *ought* to be measured and evaluated, but that it does not describe *how* to measure and evaluate outcomes. On the other hand, practitioners that are considered above-average in measurement and evaluation have reported the principles to be too restrictive, defensive-oriented, or not suitable to convey the value of larger PR strategies (Swenson *et al.*, 2019:12). It has also been critiqued for not providing a truly unifying framework of terminology, despite claims to do so (Bagnall, 2015; Dietrich, 2015). This gap between theory and practice was seen in Section 3.5 as well, where PR measurement and evaluation models were seen to be rejected in practice due to various practitioner constraints for the same reasons.

Despite the critique on these principles, the Barcelona Principles did not necessarily set out to solve every problem PR measurement and evaluation is facing. It serves to instil a healthy, relevant, and progressive mindset in PR practitioners with regards to measuring and evaluating their impact. If practitioners follow the Barcelona Principles in practice, bad measurement metrics (such as AVEs or vanity output metrics) will be rooted out in time and practitioners will form sound habits for measurement and evaluation practices. The Barcelona Principles has already done what few other industry-movements have done – raised industry-wide awareness of the need and work towards better measurement and evaluation. If bad practices can be eliminated through careful implementation of the Barcelona Principles, the industry's move towards higher professionalism, better ethical conduct and accountability, and perception of the PR function's value will be enhanced.

Swenson *et al.* (2019) found that excellent PR leaders often move away from rigid prescriptions, preferring customised approaches based on Key Performance Indicators (KPIs). The Barcelona Principles allow for this flexibility, indicating that the principles are suited to more mature PR measurement and evaluation practices.

⁷⁵ The Barcelona Principles were operationalised to some extent with the introduction of the AMEC Integrated Evaluation Framework (see Section 3.5) published in 2016.

To date, there has been little research available that explores the Barcelona Principles' effect in practice. AMEC (2015a:6) stated that the principles were "adopted and broadly used". Schriener and Swenson (2017) found that to some extent, award-winning American PR campaigns did adhere to the Barcelona Principles in their greater emphasis on outcomes (rather than outputs) which indicates that these principles are taken up in American practice. Detailed data on its uptake in practice are scarce, and while the principles were formed by a global body of experts, there is little evidence of its uptake and effectiveness especially in local contexts.

3.6.4 The Barcelona Principles in the South African PR context

The Barcelona Principles were developed for global practice, by global industry bodies. While the principles align with theoretical best practice, the South African PR context often differs from global norms. It was seen throughout Chapters 2 and 3 that South African PR practice differ from global norms in terms of practitioner roles, worldviews, communication models, as well as the general context of the PR practice where relationship building across cultural boundaries play a much larger role than in typical practice of developed countries (see Sections 2.3.3). However, it was also seen that the South African practitioner (regardless of role or the situational approach to worldviews and models) often show strategic intent in their activities (Section 2.3.3.1).

This strategic intent confirms the applicability and relevance of the Barcelona Principles in South African practice, but the Barcelona Principles works from the base assumptions of the strategic communication management framework - assuming a symmetric approach and strategic practitioner role. If South African PR practice is localised, then localisation is required for standardised measurement and evaluation as well.

Where South African PR practice differs from the global norm and theoretical best practice prescripts, it would naturally see different challenges. Mentioned throughout this study's discussions so far were the arguments that South African PR practitioners:

- fulfil a very important reflective role, yet seldom fulfil one role (often all roles, or context-specific roles) (Section 2.3.3.1);
- do not adhere to the symmetrical/asymmetrical dichotomy of practice or worldviews (rather a situational approach) (Section 2.3.3.2 and Section 2.3.3.3);
- struggle to show ROI (Section 3.4.1.1), and show a much higher than global average use of invalid output metrics such as AVEs (Section 3.4.1.2);
- faces global challenges such as time/budget/resource restraints (Section 3.4).

Taking these factors into account and given the lack of existing current research on this topic, this will require enquiry into how the Barcelona Principles are implemented in South African PR practice. As this study's theoretical discussion has argued throughout Chapters 2 and 3, PR best practice and PR measurement and evaluation is inextricable. Thus, where PR best practice sets the conditions for implementing the Barcelona Principles, implementing the Barcelona Principles also influences the extent to which best practice can take place through informing processes with different evaluation types (Section 3.3.4).

Determining the extent to which the Barcelona Principles are (and can be) implemented in the South African PR practice, as well as challenges and factors influencing its application in South African PR practice, will allow for a localised view on standardised PR measurement and evaluation.

In order to enable a comparison between current South African PR practice and theoretical global best practice, it needs to be determined what the current South African PR practice looks like, how South African PR practitioners currently measure and evaluate (and report to management) on their efforts, and what factors and challenges influence South African practitioners' adoption of standardised measurement and evaluation practice. This will allow for comparison between theory and South African practice to identify gaps and challenges that can be addressed in proposing guidelines for implementing the Barcelona Principles in South African PR practice.

3.7 Conclusion

This chapter aimed to determine how PR measurement and evaluation is standardised in current established theory and practice. By looking at evaluation and measurement distinctly, each of these concepts was seen to theoretically play a vital role in the reflective, functional, and relational paradigms to bring about the value of PR.

Evaluation to prove value fulfils an important functional role when conducted across all business levels, using different evaluation types, and tying the outcomes of PR efforts to value dimensions. This enables PR's reflective function to report on insights that serve to enhance and inform organisational decision-making and strategy formulation. Measurement as sub-unit of evaluation must be conducted using valid, reliable metrics to inform evaluation. This was, however, seen to be challenging in practice as there exists confusion over terminology and because output-based metrics are still too prevalent. Theoretical models aiming to aid measurement and evaluation are seldom taken up in practice and were seen to be adding to the confusion in terminology. Current models,

being either too complex or too rigid for implementation, led the industry to approach standardisation in the form of guidelines rather than models.

The Barcelona Principles is the first of these guidelines aimed at standardising PR measurement and evaluation. These principles should, in theory, overcome the divide between theory and practice, eliminate bad practices, contribute to creating viable organisational systems, and bring the PR industry closer to proving its value. However, these principles were developed for global practice and in order to promote the standardisation of South African PR measurement and evaluation practice the local challenges and nature of PR practice must be investigated in order to implement the Barcelona Principles in South African PR practice.

The theoretical framework set out in Chapters 2 and 3 provided the necessary constructs to empirically investigate South African PR practice in order to determine to what extent current practice aligns with this theoretical framework and how the Barcelona Principles can best be applied in the South African PR context. The empirical approach of this study is discussed next in Chapter 4.

CHAPTER 4. RESEARCH METHODOLOGY

4.1 Introduction

Chapters 2 and 3 placed the study in the context of PR literature and defined its theoretical framework. Situated in a cybernetic paradigm, the literature review examined the relevant aspects of PR measurement and evaluation in theory and practice. These discussions answered the study's first two specific research questions posed in Chapter 1:

1. *What role does PR measurement and evaluation play in PR best practice, according to established theory?*
2. *How is PR measurement and evaluation standardised in current established theory and practice?*

It was found that PR measurement and evaluation is a core component of enabling the value of the PR function in organisations, where PR practitioners should adopt a strategic communication approach that is conducive to measurement and evaluation, which enables them to report on insights drawn from their findings. PR measurement and evaluation is currently standardised in the form of the Barcelona Principles, a set of seven guidelines that promote rigorous evaluation of PR best practice. The Barcelona Principles encapsulates PR measurement and evaluation best practice, containing broad prescripts for research, integration, metrics, and reporting.

From these chapters' discussions, theoretical statements were drawn which guides the empirical research described in this chapter. This chapter sets out the framework for empirical research conducted to answer the third and fourth specific research questions that were posed in the first chapter:

3. *How do the PR practitioners in South Africa measure and evaluate their PR efforts and report to management on programmes?*
4. *What factors and challenges influence South African PR practitioners' adoption of standardised measurement and evaluation practices?*

By drawing from theoretical and empirical research, the four specific research questions together aim to answer this study's general research question, as formulated in Chapter 1:

What normative guidelines can be set for implementing the Barcelona Principles in the unique South African PR landscape?

Answering this question requires investigation into current PR practitioners' measurement and evaluation practices, as well as gaining a deeper understanding of their experience thereof. As such, this study is situated in the realm of social research.

Social research can fulfil several functions, broadly categorised as contextual, explanatory, evaluative, or generative (Ritchie, 2003:27). It is thus regarded an act of exploration, description, and explanation that allows for the unforeseen and aids understanding. Specifically, this study is regarded as exploratory research as discussed by Babbie and Mouton (2011:79-80) - which relates strongly to Ritchie's (2003) contextual function – describing the nature of what is, conducted to satisfy curiosity and gain better understanding of a topic. This foundation will allow for a better understanding of South African standardised PR measurement and evaluation practices that emerge from the localised PR landscape. The study then fulfils a generative function according to Ritchie's (2003:27) categories, proposing guidelines for future actions drawn from the contextual understanding of current practices. This generative function fits into the study's position as applied research, aiming to ultimately solve practice-based problems by proposing how South African PR practitioners can implement existing standardised measurement and evaluation practices through setting normative guidelines.

In order to establish these guidelines, both inductive and deductive reasoning processes are employed to answer the research questions. Specific assumptions are made based on literature on the topic (inductive reasoning) and these assumptions are used to further investigate the research topic (deductive reasoning) while remaining open to adaption and discovering new assumptions. The inductive reasoning process sees understanding drawn from collected information in order to answer the research questions, using empirical data to draw highly probable conclusions (Nicholls, 2009a:532; Babbie & Mouton, 2011:643). If this inductive process is conducted through an open and transparent process, the theories developed from it are theoretically generalisable (Nicholls, 2009a:531). The process of deductive reasoning involves large quantities of data that examines a predetermined hypothesis through exhaustive inquiry to conclude with a specific outcome applicable to a specific population (Nicholls, 2009a:532). Broadly speaking, inductive reasoning is used to build theory, after which deductive reasoning is used to test theory.

This chapter provides a detailed description of the research design and empirical components applied in this study (using the theoretical statements from Chapter 2 and Chapter 3 to inform this discussion and to develop research instruments). The chapter is divided into several sections addressing the study's epistemological framework, research paradigm, research design, research participants, and research methods and instruments used for the different phases of empirical inquiry. It then provides a description of the study's approach to data collection and -analysis, and states the study's limitations and ethical considerations. Table 4.1 summarises this study's research approach:

Table 4.1 Research design of this study

Research paradigm	Mixed-methods approach
Research design	Mixed-methods sequential explanatory design
Methods	Surveys Interviews
Population	South African PRISA members South African PR practitioners
Research instruments	Literature review to answer specific research questions 1 and 2 (concluded in Chapters 2 and 3) Electronic survey questionnaire to answer specific research questions 2 and 3 Semi-structured interview guide to answer specific research questions 2 and 3
Data analysis	Statistical analysis of quantitative data: electronic survey questionnaires Narrative description of qualitative information: transcribed semi-structured interviews
Data integration	Methods level integration through triangulation and instrument design Interpretation and reporting level integration through narrative weaving approach (concluded in Chapter 5)

Table 4.1 shows this study's research design rooted in the mixed-methods research paradigm. The application of each element of the research design for this study is explained in this chapter. The study's epistemological framework, discussed next, serves to support this research design in its foundational assumptions.

4.2 Epistemological framework

Daymon and Holloway (2002:4) cited that most PR and marketing research studies assume either an interpretive or realist (positivist) worldview. The worldview assumed must be decided and defined early, for it determines the study's research questions and investigative methods: the interpretive worldview is typically associated with qualitative research designs which allow the researcher to explore and make sense of social worlds, while a realist worldview holds an objective and observable reality measured with a quantitative research design (Daymon & Holloway, 2002:4-8).

An interpretive worldview is generally popular in social research, as it allows for exploring motivations, intentions, subjective experiences, and complex behaviour and meaning-making processes. This

approach, typically seen in qualitative research, is criticised for its subjectivity, difficulty in replication, problems in generalisation, and a lack of transparency (Daymon & Holloway, 2002:7). The realist worldview stands opposite this, emphasising objectivity that can be tested against reality. Positivist and/or quantitative research has been criticised for its assumption of universality, its neglect of cultural sensitivity, and that it does not appreciate historical specificity (Babbie & Mouton, 2001:41). Positivist researchers will, according to Babbie and Mouton (2011:41) assume universal human nature that puts the research at risk of decontextualized truths and ethnocentrism⁷⁶. Interpretivist research, on the other hand, has its own criticisms and neither of these approaches is regarded as perfect. However, reflecting on the epistemological approach can provide a study using either or any of these foundational starting points with the necessary rigor.

This study's epistemological stance reflects a slightly complex structure – it aims to strike a fine balance between a positivist and interpretivist approach.

To some extent, the study must be interpretivist where human agency, meaning, motivation, and understanding are considered (see Babbie & Mouton, 2011:28). However, it does not agree with a purist interpretivist stance that the researcher cannot be objective. Therefore, it has to be positivistic as well, agreeing that the world studied can be unaffected by the researcher, that the researcher can be objective, and that law-like regularities govern human behaviour. This is especially reflected in the study's theoretical approach where human behaviour is understood as cybernetic systems, and a quantitative survey method that can find relationships between characteristics and events.⁷⁷ This epistemological approach necessitates a mixed-methods research design⁷⁸.

⁷⁶ Ethnocentrism entails evaluating other cultures according to preconceptions originating in one's own culture (Daymon & Holloway, 2002:268).

⁷⁷ In addition to this study's epistemological stance that necessitates a mixed-methods research design, the study's research questions (as opposed to setting a hypothesis) also support this design, constructed as *general overarching mixed-methods research questions* that are described as "broad research questions that are addressed via the use of both quantitative and qualitative research approaches" by Onwuegbuzie and Corrigan (2014:287).

⁷⁸ This epistemological approach closely aligns with the Delphi method, a pragmatic approach rooted in the beliefs of John Dewey that research in the social sciences should directly relate to and inform real-world practice (Brady, 2015:1). The study could also have been epistemologically rooted in the "best practices" research paradigm (Bretschneider *et al.*, 2004; Vesely, 2011), which supposes that theory-building must inform action.

4.3 Mixed-methods research paradigm

This study is designed from a mixed-methods research paradigm - a pragmatic paradigm developed to accommodate both qualitative and quantitative research methods within one research design. The mixed-methods paradigm is defined by Johnson and Onwuegbuzie (2004:17) as “the class of research where the researcher mixes or combines quantitative and qualitative research techniques, methods, approaches, concepts or language into a single study”. From researchers’ frustration with the limitations and weaknesses of the qualitative and quantitative paradigms, the mixed-methods paradigm emerged. It thus allows researchers to triangulate methods and integrate findings across both qualitative and quantitative paradigms.

Du Plooy (2008:40) especially advises communication researchers to combine positivist/quantitative and interpretivist/qualitative research methods effectively to understand different parts of the communication landscape, owing to its inherent complexity. In doing so, it benefits from the strengths of mixed-methods research to obtain better answers to research questions. Working across research paradigms enhances the results of this study because it allows for greater depth and understanding of the research problem being investigated, and the insights it yields aid in creating meaningful guidelines for practitioners. Not only will the results include hard data that can show correlations and even trends, but there will also be a human element to ensure that the guidelines are suitable for people and overcome perspectives or prejudices that may be holding the practice back.

Traditionally, researchers strictly distinguished between qualitative and quantitative research paradigms based on the researcher’s ontological and epistemological assumptions and the methodology applied. To provide an overview of these two traditional research paradigms, Table 4.2 below summarises the qualitative and quantitative assumptions regarding ontology, epistemology, and methodology:

Table 4.2 A comparison of qualitative and quantitative research paradigm assumptions

Qualitative research	Quantitative research
Worldview (paradigm)	
Idealism/constructivism/interpretive	Realism/Positivism
Ontology	
Reality is subjective, dependent on people's views, values, and purposes	A single objective reality exists independently and can be described as it is
Social inquiry is not value-free and therefore cannot be separated from values	The mind and world is separate, therefore facts can be separated from the mind
Communication insights as part of the social world can be derived from subjects' perspectives	Communication can be objectively measured
Based on inductive reasoning	Based on deductive reasoning
Epistemology	
Subjectivist approach	Dualist/Objectivist approach
Reality can be described in terms of meaning people attach to experiences	Reality can be explained in terms of universally valid laws
Multiple sources of knowledge exist and can be used to explore, interpret, and understand a subjective world	Empirical observations, experience, or experiments are the only source of real knowledge
Reality is only knowable through the human mind and socially constructed meanings	Knowledge exists in the form of generalisations free of time, context, and value
Truth is a socially constructed agreement	Truth is correspondence of data and the independent reality
Validity refers to credibility and that research makes sense given the interest and purpose	Validity refers to the extent to which results reflect reality and how generalisable results are
Methodology	
Hermeneutical/dialectical	Experimental/Manipulative
Aim is to understand phenomena from the subject's point of view	Aim is objectivity and generalisation through causal effects that allow prediction
Sample size is irrelevant, and transferability is thus dependent on richness and interpretation of data	Sample size is critical for generalisation

Qualitative themes and categories can be developed as methods to explore and describe meanings communicated in different contexts	Methods that are objective can be developed to study reality
Research questions can guide the types of observations to be made, in order to understand a phenomenon	Hypotheses formulated about the nature of reality can be accepted or rejected, based on objective findings
Observations can be analysed thematically and holistically within contexts that consist of interrelationships	Hypotheses can be used to predict and control that which is being studied

(Adapted from: Daymon & Holloway, 2002; Ritchie, 2003; Snape & Spencer, 2003; Rolfe, 2006; Clissett, 2008; Du Plooy, 2008; Babbie & Mouton, 2011; Slevitch, 2011; Lund, 2012; Yilmaz, 2013; McCusker & Gunaydin, 2014; Landrum & Garza, 2015)

While the qualitative research paradigm developed in resistance to the dominance of the quantitative paradigm, the mixed-methods research paradigm developed as a blend of the former two paradigms. It fundamentally serves to use the strengths and overcome the weaknesses of each and as such it has been wholly accepted as the third methodological paradigm (Johnson & Onwuegbuzie, 2004; Law, 2004; Tashakkori & Creswell, 2007; Teddlie & Yu, 2007; Creswell, 2007; Clissett, 2008; Hesse-Biber, 2010; Polit & Beck, 2010; Ostlund *et al.*, 2011; Kleinknecht *et al.*, 2012; Lund, 2012; Polit & Beck, 2012; Fetters *et al.*, 2013; Venkatesh *et al.*, 2013; Whitehead & Schneider, 2013; Archibald *et al.*, 2015; Halcomb & Hickman, 2015; Onwuegbuzie & Poth, 2015).

This study's research design, a realist stance behind the interpretivist framework, is embodied by the pragmatic approach⁷⁹ to selecting research methods. Implementing a mixed-methods approach offers pragmatic advantages which will be explained next, owing to its ability to explore complex questions and drawing from the strengths of each paradigm (McCusker & Gunaydin, 2014).

Mixed-methods research allows this study to enhance numbers with narrative descriptions and add precision to words by adding numbers and statistics. This provides the opportunity to enhance the validity of research, answer broader and more complex research questions, use the strength of one method to overcome the weakness of another, and provide more robust findings (Johnson & Onwuegbuzie, 2004: 21; Creswell, 2007; Ostlund *et al.*, 2011; Lund, 2012; Caruth, 2013:115).

This design does, however, pose a few weaknesses, which must be considered. The researcher typically requires more time, knowledge, resources and financing to conduct all research methods

⁷⁹ According to McCusker and Gunaydin (2014) it is impossible to place research methods in a hierarchy of excellence because the methods used will ultimately be determined by its appropriateness for the specific research questions.

selected in a mixed-methods approach, and divergence between numerical and textual data often leads to inconclusive research (Mengshoel, 2012; Caruth, 2013; see also Johnson & Onwuegbuzie, 2004; Onwuegbuzie & Collins, 2007). These drawbacks were duly considered but not deemed detrimental to or insurmountable for the study.

The research design discussed next explains the mixed-methods approach in practice for designing the study, and considers its mixed-methods integration approach.

4.4 Research design: A mixed-methods sequential explanatory study and multi-level integration

This study's application of mixed-methods research stems from the paradigm's inherent pragmatic nature, which focuses on answering research questions rather than restricting the researcher's choices. As such, it is a more creative and freeing form of research that allows the researcher to deliver superior results⁸⁰ (Johnson & Onwuegbuzie, 2004:17-18; see also Hayes, 2005; Du Plooy, 2008:41-42; Kroll & Neri, 2009; Caruth, 2013; Harrison, 2013).

In this mixed-method approach both qualitative and quantitative methods are implemented, a process known as methodological triangulation which serves to verify and complement findings (Mengshoel, 2012:373; see also Onwuegbuzie & Collins, 2007; Du Plooy, 2008; Modell, 2009; Ostlund *et al.*, 2011; Caruth, 2013; Fetters *et al.*, 2013; Harrison, 2013; Venkatesh *et al.*, 2013; Archibald *et al.*, 2015; Onwuegbuzie & Poth, 2015).

However, simply viewing mixed-methods research as a combination of qualitative and quantitative methods in one research study is a gross oversimplification. Mixed-methods research, as was pointed out in the previous section, is a paradigm in its own right and therefore it is prescribed by and determines the entire research process – philosophical assumptions of inquiry, research questions, data collection, -analysis, -interpretation, and -reporting (Creswell, 2007:10).

A crucial component to ensure rigor for this process is explaining how information and data are integrated in this study's approach. This study applies the mixed-methods research design through

⁸⁰ Mixed-methods research differs from multimethod research. Though the two terms are often used interchangeably, it indicates a difference in worldview assumptions for the study in question – multimethod designs employ multiple methods in a single qualitative OR quantitative paradigm. Mixed-methods employ multiple methods across the spectrum of qualitative and quantitative (Venkatesh *et al.*, 2013:23).

triangulation⁸¹ of methods in a *sequential explanatory design type*⁸² where a quantitative phase of enquiry using electronic survey questionnaires, is followed by a qualitative phase of inquiry using semi-structured interviews with the goal of using qualitative methods to gain a better understanding of quantitative data⁸³ (Ivankova *et al.*, 2006:5; Creswell, 2007:26-34; Kroll & Neri, 2009:41; see also Block & Weatherford, 2013). This approach is generally merited for its straightforwardness and its ability to allow the researcher to explore quantitative results in more detail (Johnson & Onwuegbuzie, 2004:20; Ivankova *et al.*, 2006:5). However, it is presumed to often be lengthy, and that it is not always feasible to collect and analyse both types of data (Ivankova *et al.*, 2006:5).

The triangulation of these methods necessitates judicious integration of data to provide higher quality insights. Following the framework for integration in mixed-methods research set forth by Fetters *et al.* (2013), this study integrates data first at *methods level* through the processes of *connecting* and *merging*. Integration through connecting occurs when the first data type is linked to the following through the sample frame and where data analysis informs the interview guidelines (Fetters *et al.*, 2013).

In practice for this study, it means that the interview participants are selected from the sample of participants who responded to the survey and that the interview guidelines are informed by the quantitative data gathered. Integration then also takes place through merging⁸⁴ where the databases of both methods' results are brought together for analysis and comparison (Fetters *et al.*, 2013:2140). To effectively merge data, the quantitative research instrument (electronic self-administered questionnaire) and the qualitative research instrument (semi-structured interview guide) is developed using consistent constructs and concepts and survey data informs the interview guidelines.

⁸¹ Ritchie (2003:43) describes triangulation as the process where different methods and sources are used to check the integrity of inferences drawn from the other. Triangulation is not merely fusing together quantitative and qualitative methods in one study and offering the results of both data sets. It pertains to the interaction between these methods and how they are used strategically in the research process to support and inform different data sets and -types.

⁸² Some authors call this design type *explanatory sequential* (Creswell, 2007; Fetters *et al.*, 2013), while others use the term *sequential explanatory* (Ivankova *et al.*, 2006; Kroll & Neri, 2009). However, these authors all describe the process with the same attributes.

⁸³ Johnson and Onwuegbuzie (2004:21-22) put forth several reasons for conducting mixed-methods research. In their framework this study employs mixed-methods research for the purpose of complementarity – seeking enhancement of results from one method with results from another method. The sequential explanatory design type embodies this purpose for the chosen research paradigm.

⁸⁴ In order to effectively enable merging at the end of this study, it is already considered at the beginning of the data collection phase and as such, the research instruments are designed with this in mind.

Integration of the two phases' findings next happens at *interpretation and reporting level*, where the insights from the quantitative and qualitative research methods are presented (Ivankova *et al.*, 2006:17; Creswell, 2007:34; Kroll & Neri, 2009:40; Fetters *et al.*, 2013). This study integrates data according to Fetters *et al.*'s (2013:2142) approaches at interpretation and reporting level through *narrative* (describing findings in a single or series of reports) using a *weaving approach* where qualitative and quantitative findings are written up together and organised according to themes using the study's theoretical statements for guidance (Fetters *et al.*, 2013).

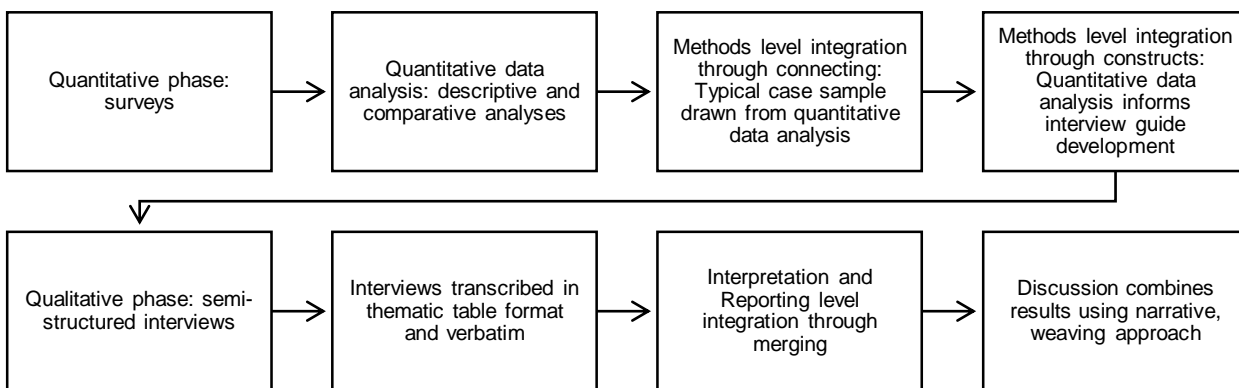


Figure 4.1 Mixed-methods sequential explanatory design type and multi-level integration

This research design will be applied to a specific pre-determined population. The next section describes the participants of this study in detail to explain why they are best suited to provide answers to this study's empirical research questions.

4.5 Participants

This study's research was conducted among South African PR practitioners affiliated with the Public Relations Institute of Southern Africa (PRISA), and current South African PR professionals. The latter group consists of PR practitioners and agencies whose details are listed on the PR and Communications directory of Bizcommunity (a leading industry blog, newsroom service, and online directory), and PR agencies and -individuals subscribed to the ListPerfect media database service.

The group of PRISA members comprised of their Public Relations Consultants' Chapter (PRCC) (25 members), senior PR professionals (195 members), and their broad membership base (1292 members). South African PR professionals comprised of a list 180 of PR agencies and practitioners

that were manually compiled from official business listings on the Bizcommunity website with the contact details for each⁸⁵, and PR agencies and individuals subscribed to the ListPerfect media database service, who provided an additional 149 participants.

These groups constituted a total of 1841 of practicing PR professionals. Table 4.3 below provides a breakdown of the participants that comprised the study’s participants:

Table 4.3 Breakdown of study participants

Group	Total members from group
PRISA – PRCC	25
PRISA – Senior PR professionals	195
PRISA – Broad membership database	1292
Bizcommunity listed agencies & professionals	180
ListPerfect PR agency and individual subscribers	149
TOTAL	1841

Participants set out in Table 4.3 had to be, at the time of the research, practicing PR professionals of any age. Excluded from this group are student members of PRISA’s Student Chapter and anyone not in the practice of PR at any level, because the research depends on practice-based information, and students and non-practitioners will not be able to contribute relevant information.

The reason this total population was selected is twofold:

1. **Appropriateness:** practitioners affiliated with professional industry bodies and -platforms are more likely to be informed of industry developments and trends, and thus will be able to offer genuinely valuable insights and information. They are also more likely to care about industry development and will, therefore, be more likely to participate in the research.
2. **Accessibility:** the entire population can be reached via their email addresses listed with PRISA, on Bizcommunity, and ListPerfect.

Closely related to accessibility is the issue of gatekeeping, which must be considered. For this study’s empirical research, the gatekeepers to the research population included the management structures of PRISA and ListPerfect. Since these organisations control any access to their member databases

⁸⁵ This information is public and all listed individuals and agencies elected to provide their information on this platform – many of these agencies and individuals host their own newsrooms on this platform.

with contact information, they would have had to allow the researcher to contact their database of members. They were expected to be judicious with their consent in this, as they are trusted by their members to safeguard their information. However, to the researcher's advantage, the value of this research could easily be conveyed to the gatekeepers and participants and the quantitative methods were unobtrusive.

To this end, the current CEO of PRISA, as well as the owner of the ListPerfect, were contacted and after providing information on the research, its purpose, and its ethical clearance from the North-West University, the researcher obtained written consent to conduct the research among PRISA members and the PR agencies subscribed to the ListPerfect service. PRISA agreed to distribute the researcher's survey to its members on the researcher's behalf, while the owner of ListPerfect provided the researcher with a spreadsheet containing the relevant database's contact information with the stipulation that the researcher must treat the information as confidential and is allowed one (1) email only to these listed subscribers.

The research methods conducted among the research population described above are detailed in the following section to show how each method was selected and designed to best answer the relevant research questions.

4.6 Research methods

Following this study's research questions and research design, quantitative surveys and semi-structured interviews were selected to be applied in a sequential explanatory design type (see Section 4.4). This section details the use of each research method, motivating why it yields the best results to answer this study's research questions, and describing the application of the research method as well as the sampling method applied.

4.6.1 Quantitative self-administered surveys

4.6.1.1 Surveys as research method

Surveys are used as quantitative method to answer specific research question three and four as posed in Section 1.3:

Specific research question 3:

How do the PR practitioners in South Africa measure and evaluate their PR efforts and report to management?

Specific research question 4:

What factors and challenges influence South African PR practitioners' adoption of standardised measurement and evaluation?

A survey was selected for the quantitative phase of inquiry because it yields large amounts of data from the population, at relatively low cost. Other research methods such as case studies were considered but ultimately rejected because they would not yield the same amount of information in an attainable manner – the time and cost implication would be too large.

Central to surveys as research method are the following characteristics:

- Surveys is considered a **primary data collection method** in social research, with relatively low control (Babbie & Mouton, 2011:79).
- **Information is gathered by designing a questionnaire** that contains specific constructs or themes that relate to the research questions and then distributing these questionnaires to the selected population or sample (De Leeuw *et al.*, 2008:2; see also Scheuren, 2004).
- Surveys take place in a **semi-controlled environment**, where the researcher can control the measurement instrument but not the responses of participants (Du Plooy, 2008:188).
- Surveys are **flexible in terms of length**, where the length is determined by the research purpose (Scheuren, 2004:12).
- Surveys focus on **gaining and measuring information about opinions and attitudes, as well as factual characteristics or behaviours**, and may include questions that serve to gather both types of information. Therefore, surveys as research method has the potential to yield insightful information by including open-ended questions (asking 'why' or 'how') or closed-ended questions that limits answers to predetermined options (Scheuren, 2004:12).

As such, surveys in practice have the beneficial capability of describing the characteristics of a large population; it can measure several variables; it provides a degree of flexibility in its application and data analyses of its results; the researcher can ask many questions on a topic. To account for the semi-controlled environment within which surveys take place, the researcher aimed to make the survey questions as clear as possible, offered participants the opportunity to contact the researcher directly if they had any queries, and piloted the survey to ensure confusion or incoherence is kept to a minimum (see Section 4.6.1.4 for a complete description of this process).

While surveys allow flexibility in analysis (and to some extent in application), it is quite inflexible in terms of inquiry. If the researcher becomes aware of a new facet or variable, the questionnaire cannot be changed to incorporate the new information. However, clearly predefined constructs and the study's sequential design minimises this risk (see Du Plooy, 2008:188-193; Babbie & Mouton, 2011:266; De Franco, 2012; Scheuren, 2004). This study aimed to address this issue for surveys with its research design, as qualitative semi-structured interviews provided the opportunity to explore specific points and trends that came forth from survey data. This was also a further manifestation of the study's stance towards inductive and deductive reasoning as described in Section 4.1. Deeming surveys a suitable method to yield the data required for this study, the survey sampling applied is described next.

4.6.1.2 Sampling

Sampling occurs because only a portion or a subset of the research population is used to gather data or information. Because participation in this study is elective among the population described in Section 4.5, the quantitative phase of this study's sampling method is classified as a *voluntary response sample* (also termed *self-selection* or *voluntary participation* sample).

This type of non-probability sampling depends on people's willingness to participate, while no-one from the research population is deliberately denied the chance to participate (De Leeuw *et al.*, 2008; Skowronek & Duerr, 2009; Walliman, 2011; Etikan *et al.*, 2016; Laerd, 2019c). Non-probability sampling⁸⁶, as applied here, implies that the researcher cannot be certain of the probability that each member of the population will be chosen or has a non-zero chance of being selected to form part of the sample.

⁸⁶ As opposed to probability sampling, where every member of the population has the chance of being chosen to be a part of the sample.

Non-probability sampling is often used in mixed-methods research for practical reasons – it is especially more cost-effective, simpler, and faster than more complex probability sampling strategies. While voluntary participation provides these benefits, it is also an ethical consideration (see Section 4.8). According to Laerd (2019c), non-probability sampling provides a suitable alternative where probability sampling cannot be applied (for whatever reasons), allowing the research to still be conducted rather than being abandoned. Voluntary response sampling is appropriate for this study because the need to search for appropriate cases or respondents is eliminated and because individuals that self-select to participate will likely be more committed to participating and likely more willing to provide their insight into the topic being studied, which will benefit the qualitative phase of this study.

However, voluntary response samples are prone to self-selection bias (where the decision to participate reflects an inherent bias) and low representativeness (Laerd, 2019c). This study's mixed-methods design will allow the researcher to investigate any anomalies in the data in more detail in order to qualitatively identify these biases and explore it further.

The main disadvantage is that non-probability sampling methods do not allow you to estimate the extent to which sample statistics are likely to differ from population parameters. In statistics, the results from the sample can only be used to interpret meaning that applies to the chosen population. By choosing the PR practitioners as described in Section 4.5, interpretations from the sample apply only to them. However, this study's empirical investigation was pragmatically focused on gaining an understanding of the selected constructs and therefore a representational sample and statistically valid generalisation were not deemed critical. Admittedly, there might also be certain biases/demographics/other underlying factors that encourage a PR practitioner to join a governing body, listing directory, or directory subscription. These underlying factors may or may not influence the way in which the participants answer the questionnaire – there is no clear-cut way of knowing what these factors and their influence might be; therefore, the chosen population cannot be seen as a representative sample of the entire South African PR practice and results will not be generalised or presented as such.

An *electronic self-administered survey questionnaire* was implemented as a research instrument, where the survey questionnaire was distributed via email to the research population described in this section. It was then electronically completed and electronically submitted by each participant.

The following section details the survey instrument used for this study, describing how the survey questionnaire was designed.

4.6.1.3 Survey questionnaire design

The survey questionnaire design is an important process as it determines the quality of data the researcher has to his/her disposal at the end of the process. Babbie and Mouton (2011), warning against pitfalls in designing survey questionnaires, proposed factors that merit vigilance throughout the design process. In designing this study's research instrument, particular attention is paid to the following factors put forth by Babbie and Mouton (2011:234-237; see also Gillham, 2008):

- Constructing clear and unambiguous questions
- Avoiding loaded questions
- Not posing double-barrelled questions
- Ensuring questions are relevant
- Designing short items to ensure reliable data

For the actual design process, this study followed the basic conceptual foundation of reliable and valid survey research as described by De Leeuw *et al.* (2008:4-7) – the process is described below:

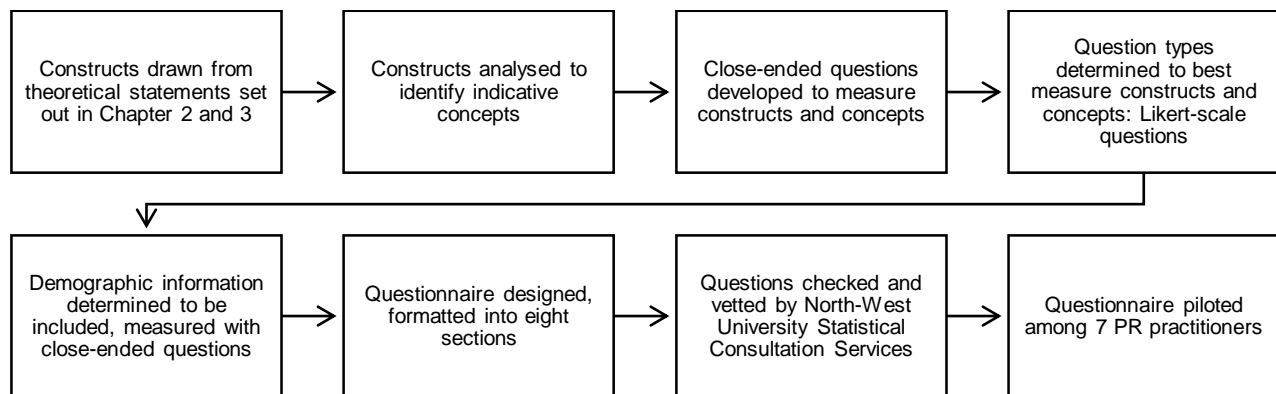


Figure 4.2 Questionnaire development process

Figure 4.2 depicts the questionnaire design process applied in this study. The survey design was guided by this study's research objectives and research questions (see Chapter 1). Throughout Chapters 2 and 3, theoretical statements were drawn from the study's theoretical framework. These statements were used to identify constructs in theory that relate to indicative concepts identified in literature on the Barcelona Principles (see Table 3.8). Questions were then formulated to measure each construct and to obtain demographic data (age, gender, type of practice, experience in years,

size of PR team) from participants. A combination of close-ended questions and 5-point Likert-scale questions were developed to gather nominal and ordinal data for descriptive and comparative statistical analyses (see Section 4.6.1.6).

The questionnaire was then formatted into eight captioned sections, grouping the related constructs together with a short introduction to contextualise each section (See Appendix A for the final questionnaire). After this design, the questionnaire was checked, amended, and vetted by the North-West University Statistical Consultation Services to ensure that questions are correctly phrased and grouped. The questionnaire was then piloted with 7 PR practitioners who all fit the description of the research population described in Section 4.5. The piloting exercise concluded that the questionnaire was easy to understand, an acceptable length, and easy to complete and submit. No changes were made to the questionnaire following the piloting exercise.

Table 4.4 and Table 4.5 depict the grouping of constructs and concepts⁸⁷ derived from the theoretical statements:

Table 4.4 Constructs and concepts derived from theoretical statements

Theoretical statement/s	Construct	Concept/s	Question Number/s
1	Reporting on insights	Generating suggestions Translating impact	31-33
2, 7	Strategic alignment	Measurable goals Primary strategic alignment Secondary strategic alignment	15-19
3	Practitioner role	Technician Manager Strategist	4-6
3	Strategic access	Information access Decision-making	7-8
4	Symmetric worldview	Stakeholder dialogue Innovation	9-11
5	Stakeholder relationships	Stakeholder relationship building Stakeholder reporting	20-22
6	Challenges	Financial Time Knowledge Value Understanding/interest Standardisation	25-30

⁸⁷ The terminology used for distinguishing *constructs* and *concepts* was determined with the help of the NWU Statistical Consultation Services. Main items were grouped and labelled as *constructs*, while the components acting as indicators for each construct in the survey questionnaire were labelled *concepts*, or sub-constructs.

Theoretical statement/s	Construct	Concept/s	Question Number/s
8	Evaluation types	Formative evaluation Process evaluation Summative evaluation Quantitative evaluation Qualitative evaluation	34-41
9	Measurement maturity	Outcome level Outtake level Output level	42-44
9	Social media measurement	Social media	45
9	AVEs	AVEs Multipliers	46-47
10	Barcelona Principles	Formal process Awareness Implementation	12-14

Table 4.5 Demographic information

Demographic characteristics	Constructs	Question Number/s
Demographics - practice	Size of PR team Type of practice Reporting line	1-3
Demographics - practitioner	Age Gender Experience Education	48-51

It was seen throughout this study's literature review that PR best practice enables measurement and evaluation, and thereafter the actual implementation of measurement and evaluation practices determines its success. Taking this into consideration, the constructs and concepts set out in Table 4.4 and Table 4.5 above can be grouped according to two themes⁸⁸: Practice (elements that influence the implementation of the Barcelona Principles) and Measurement and Evaluation (the way measurement and evaluation activities, aligned with the Barcelona Principles, are conducted). Table 4.6 displays this grouping of constructs:

⁸⁸ While these thematic groupings will not be used for statistical analyses, it will be useful for discussing and interpreting the results in the next chapter.

Table 4.6 Thematic grouping of constructs

Theme	Construct
Practice	Strategic alignment
	Practitioner role
	Strategic access
	Symmetric worldview
	Stakeholder relationships
	Reporting on insights
	Demographics - practice
Measurement and evaluation	Evaluation types
	Challenges
	Measurement maturity
	Social media measurement
	AVEs
	Barcelona Principles
	Demographics - practitioner

The next section details the data collection process and the response rate that was gained after implementing the questionnaire described in this section.

4.6.1.4 Data collection and response rate

Achieving acceptable response rates is an important factor to consider when using surveys as research method - to gather as much data as possible to enhance the non-probability sample. A response rate of 50% is conversely stated as acceptable (Babbie & Mouton, 2011:261) – however, a multitude of survey response rates have been found to be the “norm”. Baruch (1990) found that response rates decline among executive level respondents and that over the years, a trend in declining response rates could be seen. In 2018, the average online survey response rate is found to be 29% (Lindemann, 2018). The average email survey’s response rate for 2018 is estimated to be 30%. Interestingly, recent studies have shown that surveys with lower response rates (around 20%) provide more accurate measurements compared to surveys with higher response rates (near 60-70%) (Lindemann, 2018).

Electronic self-administered questionnaires created with Google Forms, each accompanied by an electronic cover letter (see Appendix A), were distributed to the research population for the period of 12 June 2019 to 18 July 2019⁸⁹. An email containing the link to the survey was sent to each contact.

⁸⁹ The entire process from first contact with the distinctive organisations to distributing the final survey reminder took place over the period 20 May 2019 to 18 July 2019. During this time, the researcher received several direct communications from participants who voiced their support for the research as a valuable contribution and aid to practice.

A total of 12 emails and reminders (totalling 3934 emails) were distributed during this period, while the email open rate, click rate, and survey response rate were continuously monitored until the email open rate fell below 1%. The survey was distributed to a total of 1841 unique and valid email addresses. 103 respondents completed the questionnaire, constituting a response rate of 6%. For the purpose of statistical analysis, a minimum of 80-120 responses was advised by the North-West University Statistical Consultation Services in order to conduct confirmatory factor analysis with at least 10-15 participants per variable. While this response rate is considered low, it constituted an acceptable sample size for statistical analysis.

4.6.1.5 Validity and reliability

This section will review the validity and reliability of this instrument before moving on to discussing the data analysis process. In quantitative research, validity and reliability are well-established concepts, and within a mixed-methods design the rigor of each measurement instrument is best discussed separately as suggested by Venkatesh *et al.* (2013:41; also Onwuegbuzie *et al.*, 2014:289). This discussion focuses on the quantitative concepts of internal and external validity and reliability as applicable to surveys as research method.

Internal validity in quantitative research refers to the extent to which the measurement instrument (in this case the survey questionnaire) will consistently and reliably measure the construct it was designed to measure (Giddings & Grant, 2009:125; Babbie & Mouton, 2011:122). This concept is broken down to face validity, content validity, and construct validity.

For this instrument, face- and content validity was obtained through inputs and checking by a subject expert practitioner and academic, and paying careful attention to the relation between constructs, concepts, and the questions formulated to measure these.

Face validity of a questionnaire shows that the questionnaire items, upon looking at it, appear to be relevant to the topic. It is the easiest form of validity to attain and judge (Giddings & Grant, 2009:125; Heale & Twycross, 2015:66). Face validity for this instrument was confirmed by careful checks by subject experts to ensure that the various elements applicable to this study are logically related.

Content validity refers to the measure to which the questionnaire item can be trusted to measure the construct they were intended to measure (Babbie & Mouton, 2011:122). Each questionnaire item in this study was carefully considered for its relation to the study's theoretical framework and was developed from specific theoretical assumptions and this development was demonstrated in Table 4.4.

Construct validity is gained through determining logical relationships between variables, based on theoretical expectations. Du Plooy (2008:137) defines construct validity as “relating the measurement instrument to some overall theoretic framework to ensure that measurement is logically related to other concepts in the same framework”. Construct validity furthermore refers to the extent to which a measure covers the range of meanings included in a concept (Babbie & Mouton, 2011:123) – the logic behind this study’s construct validity can be seen in Table 3.8 and Table 4.4 where the theoretical statements as an overarching theoretical framework were used to extract related constructs used to develop the research instrument. Construct validity for this instrument was assessed through conducting factor analysis, discussed in the following section.

Lastly, in terms of internal validity, this study’s methodological triangulation serves to further enhance internal validity (Babbie & Mouton, 2011:125) where the research findings of the questionnaire are further explored through qualitative interviews, examining the same constructs using different methods. This form of triangulation aided in gaining a better understanding of each construct and ensuring that its nuances are properly understood and captured.

External validity in quantitative research refers to the generalisability of findings (Onwuegbuzie, 2000; Du Plooy, 2008:90). Given the sampling strategy of this study, generalisability will be very low for practitioners outside the scope of the participants described in Section 4.5, as was discussed in Section 4.6.1.2.

Reliability in quantitative inquiry refers to whether a technique would yield the same results time and again⁹⁰ (Babbie & Mouton, 2011:119; Heale & Twycross, 2015:66-67), determined by calculating the Crönbach alpha coefficient (see Section 4.6.1.6). Reliability also relates to the instrument and research process being free of measurement errors (McMillan & Schumager, 2006). This study avoided measurement errors by 1) eliminating intercoder inconsistencies through, as only one researcher worked with the data, 2) correctly capturing data as it was electronically submitted and required no manual coding, and 3) ensuring that the questions were asked correctly by pre-checking the measurement instrument (survey questionnaire) with the Statistical Consultation Services of the North-West University.

⁹⁰ It is important to bear in mind, as noted by Babbie and Mouton (2011:120), that reliability does not indicate precision/accuracy. A measurement instrument may produce the same results consistently, but that does not necessarily mean that the results are accurate.

4.6.1.6 Data analysis

The purpose of statistical analysis is to transform raw data into useful information. The nature of groups and individuals implies that analysing the group leads to a better understanding of the behaviour of the group, but that it then necessarily becomes less applicable to the individual. Individualism is largely grounded in exceptions. To understand a group, exceptions are minimised, if not eradicated. Any deduction made about an individual based on group statistics will necessarily be incorrect to some extent. On the other hand, a 100% accurate description of an individual does not provide any means of predicting outcomes for another individual under similar circumstances. A balance must be found between what is generally applicable to a group and to what extent what is applicable to the group is applicable to the individuals within that group.

It has been comically stated that 99% of statistics only tell 49% of the story. Statistics on its own cannot possibly be a true reflection of a reality as complex as the real world. The numbers generated by statistical analysis must always be accompanied by interpretation of the data. Furthermore, the interpretation needs to account for the measure of inaccuracy involved.

The two components of statistics – numbers and interpretation – are extremely co-dependent and because the prior is an exact science and the latter is qualitative in nature, the outcome is sometimes fickle. The numerical portion will pose very rigid criteria which, when followed exactly or discarded for the sake of interpretation, might result in a negligible difference. The exact rigid statistical rules might lead to a result indicating that some parameter with a hypothetical value of 0.88, whereas discarding the rules for the sake of a well-thought-through interpreted alternative might lead to 0.87. When it comes to the final interpretation of the data one must consider whether there is really a difference between the hypothetical “0.87” and “0.88”.

For the purpose of this study, the main aim of the statistical analysis was to give an indication of the relation between the various constructs and concepts set out in Table 4.4, i.e. to see whether a particular result in one construct relates to a particular result in another construct or concept. The statistics then needed to indicate whether the result has a notable effect on practice – for this, effect sizes were determined and reported (discussed below). For each construct set out in Table 4.4, 5-point Likert-scale question/s were developed according to its indicative concepts to gain insight into the population’s general PR practice and measurement and evaluation practices (see Section 4.6.1.3 and Appendix A).

This enabled statistical analysis of continuous data and calculating construct scores for the constructs resulting from the factor and reliability analyses. The construct scores were then used to determine how the different constructs impacted or correlated with one another. Data for constructs were coded in such a way that the higher construct score indicated practices that are closer to the theoretical ideal for the construct in question.

All statistical analyses were conducted using IBM SPSS Statistics Version 25 (IBM, 2019) by the North-West University Statistical Consultation Services. This section details the descriptive and comparative statistical analyses that were conducted on the data described above.

4.6.1.6.1 Descriptive statistics

As descriptive statistics analyse one variable at a time, it is called univariate analysis (Walliman, 2011:116). Descriptive statistics, typically expressed as *n*-values, are used to summarise and organise data (without making inferences about data) (PRSA, 2011; Walliman, 2011:116; Narkhede, 2018). It describes how values of a variable are distributed - given the purpose of this research instrument, i.e. collecting large quantities of data, descriptive statistics are used to break data down for easier analysis. Descriptive analysis was conducted for all questions in the questionnaire and aided in answering the third and fourth research questions to inform the discussion during integration at reporting level in the following chapter.

Descriptive statistics analyses applied to this study's data include (Walliman, 2011:116-118):

- frequency distribution (showing variable values as a number and percentage of the total cases);
- central tendency (average as mean); and
- measures of dispersion (how values are spread out or bunched up) expressed as standard deviation (SD).

4.6.1.6.2 Comparative analyses

Comparative analyses are methods of bivariate analysis (looks at the properties of two variables in relation to each other) or multivariate analysis (considers the relationships between more than two variables in relation to each other) (Pickvance, 2005).

Using bivariate analyses, data in this study were analysed to determine correlations between specific constructs and concepts. These relationships were interpreted to determine what factors and challenges influence South African PR practitioners' adoption of standardised measurement practices (specific research question 4). For Likert-scale questions, scores were calculated for each

concept or construct for the construct resulting from the factor and reliability analyses by calculating the average to allow for inferential analysis. As stated before, higher scores per construct indicated practice that is closer aligned with the theoretical ideal.

When discussing comparative analyses in this study, it is important to take into account the practical significance of the findings⁹¹ - that is, does the observed finding have a notable effect in practice? Effect sizes are used to report practical significance when investigating correlations of this study's data.

Comparative analyses for this study thus determined correlations and effect sizes between constructs and reported on the practical significance of the results. Spearman's correlation coefficient, t-tests, ANOVA tests, Crönbach alpha coefficient, and factor analyses were applied to this end. The following constructs set out in Table 4.7 below have been used for comparative analyses:

Table 4.7 Constructs for comparative analyses

Dependent construct	Independent constructs
Reporting on insights	Strategic access
	Symmetric worldview
	Practitioner role
	Relationships
	Measurement maturity
	Evaluation types
Strategic alignment	Strategic access
	Practitioner role
Dependent construct	Independent constructs
Practitioner role	Strategic access
	Reporting on insights
	Practitioner education
	Challenges
	Strategic alignment
Symmetric worldview	Relationships
	Practitioner role
	Reporting on insights
Relationships	Reporting on insights
	Strategic access
	Strategic alignment
	Practitioner role
Challenges	Measurement maturity
	Practitioner role
	Strategic access
	Reporting on insights
	Practitioner knowledge
	Practitioner education
	Measurement maturity

⁹¹ Due to the sampling strategy for this phase of inquiry, statistical significance cannot be determined and is thus not reported.

Dependent construct	Independent constructs
	Evaluation types
Strategic access	Strategic alignment
	Reporting on insights
Evaluation types	Reporting on insights
	Measurement maturity
	Practitioner knowledge
Formative evaluation	Measurable goals
	Strategic access
Process evaluation	Measurement maturity
Summative evaluation	Reporting on insights
Measurement maturity	AVEs
	Social media metrics
	Practitioner role
Social media metrics	Strategic alignment
Barcelona Principles	Practitioner role
	Strategic alignment
	Strategic access
	Reporting on insights
	Practitioner knowledge
	Evaluation types
	Measurement maturity
	Relationships
	Challenges
	Demographics - practice

Comparative analyses through various non-parametric tests of the questionnaire's constructs and concepts (both scaled and biographical) provided insight into current practices. The first of these statistical analysis methods employed in this study was aimed at determining these correlations and effect sizes in the dataset.

Spearman's correlation coefficient (r_s)

To assess the direction and degree of association, statistically termed correlation coefficients, the Spearman's rank order correlation coefficient is used to determine positive or negative relationships between two variables (Saunders *et al.*, 2009:459; Walliman, 2011:121; Fenton & Neil, 2012; see also Bacon-Shone, 2015). Using ordinal, interval, or ratio data this test determines the strength and direction of a monotonic relationship between two variables⁹². It is applied here to determine the correlation between constructs, concepts, and specific demographic data.

⁹² As opposed to the rate they move at in the same direction which would constitute a linear relationship.

This test indicates to what degree *A* increases with *B* or vice versa. It is expressed as a number between -1 and 1. The closer to 1, the more certain we can be that there is a positive linear correlation between the two constructs observed (the one increases/decreases with the other) and the closer to -1, the more certain we can be of a negative linear correlation (the one increases as the other declines, or the one decreases as the other increases). When the correlation coefficient is close to zero it means that there is no evidence of a relationship between the constructs analysed (Saunders *et al.*, 2009; Fenton & Neil, 2012; Laerd, 2019a). Reporting on these correlations, effect sizes⁹³ are used to interpret the practical significance of the results. Correlations for this study are interpreted according to accepted standards as follows (Ellis & Steyn, 2003):

- $r_s = 0.1$ is considered a small correlation, not practically significant
- $r_s = 0.3$ is considered a medium correlation, practically visible
- $r_s = 0.5$ is considered a large correlation, practically significant

T-tests

Two-group t-tests are used to determine a significant difference between the means of two groups (Walliman, 2011:124; Pezzullo, 2013; Laerd, 2019b). T-tests are used to determine the difference in means between two unrelated groups on the same variable (termed the 'dependent' variable), here used to test for differences between demographic groups' construct scores and certain concepts.

It is important to note that t-tests are carried out when the independent variable is measured on a continuous scale – thus, interval or ratio data. In this case, implementing Likert-scale questions yield interval data and t-tests can be applied for the required independent variables. The output of t-tests provided information on the differences between means using *t*-values and on effect sizes, using Cohen's *d* to interpret the results.

The guidelines for this interpretation is as follows:

- $d = 0.2$ is considered a small effect, not practically significant
- $d = 0.5$ is considered a medium effect, practically visible
- $d = 0.8$ is considered a large effect, practically significant

⁹³ Effect size (practical significance) is a method of describing the difference in means where the difference in means for different constructs are divided by the estimate for standard deviation (*SD*). Effect size is a standardised measure of the magnitude of the observed effect, commonly expressed as *r* or *d* (Field, 2005:4; see also Ellis & Steyn, 2003). In simpler terms: effect size/practical significance determines whether the numbers seen are notably different, or whether the difference could be attributed to the inherent estimate nature of statistics. This is indicated by considering the variance in the context of the expected spread of data.

Analysis of Variance (ANOVA)

One-way ANOVA (Analysis Of Variance) tests are applied when determining the differences between three or more groups. ANOVA tests were used to test for differences between more than two demographic groups' constructs and certain concepts. In principle, ANOVA tests follow the same recipe as t-tests, but it allows for including multiple variables, thus it achieves the same results as multiple t-tests would have achieved, in a more efficient manner. Also using Cohen's *d* to interpret effect sizes, the guidelines for ANOVA tests are the same as that for t-tests described above.

Reliability: Crönbach alpha coefficient

Determining the extent to which the questionnaire items provided the same results time and again (see Section 4.6.1.5), the reliability (internal consistency) of this questionnaire was tested using the Crönbach alpha coefficient. Crönbach alpha coefficient have been determined for this dataset to determine reliability and was reported on in the results chapter. This test considers the score for each item and the sum of the related items measured in order to provide an estimate of inter-item correlations to determine the internal consistency of questionnaire items (Laerd, 2019d). A Crönbach alpha normally ranges between 0 and 1, where 0.6 is considered good, and 0.8 is considered high – the closer to 1, the higher the internal consistency of the items (Gliem & Gliem, 2003; Osborne, 2014:112; Giannoulis, 2019). It should be noted that this measure is affected by the number of items tested and it can only indicate the overall reliability coefficient for variables and if there are underlying factors influencing participants' responses, it cannot be distinguished (Gliem & Gliem, 2003).

Factor analysis

Factor analyses were conducted in order to determine the content validity of items for the constructs tested with this instrument and reported in the results chapter. Factor analysis's basic premise rests on the assumption that multiple variables have similar patterns for responses, which allows for determining the overall variance in the observed variables (Rahn, 2019).

Factor analysis⁹⁴ is used to establish “underlying dimensions between measured factors and latent constructs” (Taherdoost *et al.*, 2014:375) – it determines whether multiple variables have similar response patterns because they all are associated with a latent (unobservable) variable. Confirmatory factor analysis is conducted by specifying the number of factors that are required in the data, as well as which variable measured with the research instrument relates to which latent variable in order to confirm what is expected based on pre-established theory (Statistics Solutions, 2013,

⁹⁴ Two main types are distinguished – confirmatory (confirming findings against a theoretical statement, used for this study) or exploratory (the links between the variables are not yet known) (Rahn, 2019).

2019b). Relationships between variables to the underlying factor are expressed by 'factor loading' (Rahn, 2019), an outcome of factor analyses, indicating the strength of the relationship between the factors and the items grouped together for that factor. Factor loadings of 0.4 are generally considered important (Rahn, 2019).

Confirmatory factor analysis is a multivariate statistical procedure, typically used to determine how well the measured variables represent the number of constructs. This allows the researcher to specify the number of factors required in the dataset and which measured variable is related to which latent variable. This process broadly takes place in four steps: defining individual constructs; designing the measurement model theory; specifying the measurement model; and assessing the validity of the measurement model to determine how well the data fit (Statistics Solutions, 2019a).

There are two main considerations when determining the suitability of data for factor analysis; the first is sampling adequacy, which is tested by Kaiser-Meyer-Olkin (Kaiser 1970, 1974; Kaiser & Rice, 1974) while the strength of the correlation is evaluated using Bartlett's test of Sphericity (Bartlett, 1954). The Kaiser-Meyer-Olkin (KMO) test is used to determine whether a correlation matrix is suited for factor analysis. For factor analysis it is expected that there will be moderate to strong correlations between the indicators to be factor analysed. The question that the KMO aims to answer is "what correlation is sufficiently large". There are various interpretations of what the accepted minimum KMO value is for a sufficiently large correlation. The sampling according to Field (2000) is 0.5, whereas Pallant (2013) as cited by Hadi *et al.* (2016) argues that 0.6 and above is acceptable. Kaiser (1974) cited by Hadi *et al.* (2016) recommends 0.5 as the absolute bare minimum and Hutcheson and Sofroniou (1999) describe values of 0.5 to 0.7 as mediocre; 0.7 to 0.8 as good; 0.8 to 0.9 as great and above 0.9 as superb. By all accounts, a KMO value of below 0.5 is not acceptable and caution should be applied when working with values below 0.6, however, it is still acceptable for use.

There is no specific answer to the question "how many respondents do you need for conducting confirmatory factor analysis?" – and many rules of thumbs exist. The common rule applied to this study is a minimum of 10-15 participants for the construct with the most variables, which indicated a minimum response total of 80 for the quantitative part of this study – as was advised by the Statistical Consultation Services of the North-West University – and 103 valid responses were obtained.

Bartlett's test of Sphericity is used to determine whether a number of samples (denoted by k) have equal variances. Among other statistical tests, ANOVA tests and t-tests assume such equal variances. The null hypothesis is that all samples have equal variances (the desired result for this study), the alternative hypothesis is that any randomly selected pair of samples have different variances. The Bartlett's test is used to confirm that the data collected from the surveys are suitable

for t-tests and ANOVA tests. The output of the Bartlett's test statistic is a table relating chi-square distributions to degrees of freedom which is in turn used to determine the probability that the null hypothesis is false. An indication of the strength of the relationship among variables relating the approximated chi-square, degrees of freedom, and significance. A significance of $p < .05$ is required.

Outputs for this section are reported on and interpreted in the next chapter with the following indicators for goodness of fit (Chetty & Goel, 2015):

- Correlation matrix (an output of correlation coefficient that relates the correlations between a single variable and all other variables in the investigation): $>.00001$.
- Kaiser-Meyer-Olkin: >0.5
- Bartlett's Test of Sphericity: $p < .05$
- Communalities (an output that shows the degree of variance accounted for by the extracted factors): <0.3 .
- Total variance explained (using Eigenvalues, the total variance explained for each factor): $>50\%$.

As described in Section 4.4, the study's sequential design determines that the quantitative phase of inquiry described in this section is used to inform and is followed by a qualitative phase of inquiry. The next section details the qualitative research method implemented after concluding the quantitative phase. The chapter's discussion will then move on to outline the limitations of the study and the ethical considerations during the research process.

4.6.2 Qualitative semi-structured interviews

4.6.2.1. Semi-structured interviews as research method

Semi-structured interviews were implemented for this study's qualitative phase of inquiry to gain a deeper understanding of certain constructs that were analysed during the quantitative phase of inquiry (see Section 4.6.1).

With semi-structured interviews a broad set of questions and themes guide the discussion, allowing deviations where and as it is needed (Du Plooy, 2008:198; Nicholls, 2009b:640). Through this method, this study gained the opportunity to explore the detail surrounding practitioners' measurement and evaluation practices, as well as the opportunity to gain insight into their perceptions on the relevant topics addressed.

Essentially, semi-structured interviews as research method is ideal for this study because it combines the elements of structured- and in-depth interviews, benefiting from both (Du Plooy, 2008:198-199; Harrell & Bradley, 2009:23-28):

- From structured interviews, the researcher can use close-ended questions and **filter questions** (to skip parts that aren't relevant) that optimises efficiency.
- From in-depth interviews, the researcher has the benefit of **freedom to explore** how the participant's frame of meaning is constructed. The researcher can interpret answers and look for suggestive non-verbal cues that provide subtext and lead to further exploration.
- The conversational nature of semi-structured interviews allows for **easy two-way communication**, and in this lies one of the biggest advantages of this method – the researcher has the opportunity to clarify answers and provide guidance on questions to ensure the correct construct is communicated and measured.

However, this level of engagement with participants makes the researcher's role in social research interviews more complex than in quantitative research. During these interviews, the researcher must interpret answers and look for suggestive non-verbal cues that provide subtext – but also be aware of their own representation (see Section 4.6.2.4). This study's qualitative phase of inquiry followed Babbie and Mouton's (2011:251-254) suggestion that the researcher can enhance the quality of interviews by keeping a relatable appearance and demeanour, being completely familiar with the interview schedule, follows the wording exactly, and recording responses exactly.

As an alternative to interviews, focus groups could have been considered a viable option in this study's research design. Lewis (2003:58; also Harrell & Bradley, 2009) discusses the choice between interviews and focus groups in research design. Three key factors influence this choice – the type of data required, the subject area, and the nature of the study. In this discussion, Lewis (2003:58-60) points to interviews for a depth of focus on the individual, the detail required, and delicate topics. Focus groups, on the other hand, can generate valuable insights into the group dynamics but with less detailed individual accounts. Focus groups are beneficial for revealing attitudes, nuances, participant interaction, and illuminating the ways in which context shape people's opinions, but it does not provide the individual depth required for this study's qualitative phase of inquiry, as the main function of this method is to create a deeper understanding of practitioners' views and experiences. Focus groups were thus rejected as qualitative research method. Qualitative case studies could also have been considered to obtain in-depth industry information around practices, challenges, and influences (Beverland & Lindgreen, 2010), but this would have been exceptionally challenging in terms of time, resources, and funding and was thus deemed impractical.

Qualitative interviews are the most suitable method for the depth of data it will yield as well as the resources available to conduct the research. Interviews can be conducted in a cost-efficient, timely manner and its limited population ensures that data analysis is attainable for one researcher. Seeing as interviews require much more in-depth discussion and time, a sample was drawn from the research population to conduct interviews. Sampling in qualitative research can be a dubious topic and the sampling strategy of this study is discussed in more detail next.

4.6.2.2. Sampling

For qualitative researchers, sampling has long been a confusing topic, neglected for many years in literature (Koerber & McMichael, 2008; see also Marshall, 1996). Regardless of the size of a research study, sampling decisions remain important (Ritchie & Lewis, 2003:77-263). Sample sizes in qualitative research are difficult to generalise as statistical formulas aren't applicable, but Koerber and McMichael (2008:468) suggest that quality in qualitative sampling is more important than quantity.

Koerber and McMichael (2008) describe several sampling strategies that exist for qualitative research that enhance the rigor of the entire research design - *purposeful sampling* as described by these authors was selected for this study.

Purposeful sampling is a non-probability sampling method which entails that the researcher looks for participants who have certain qualities or traits, and their method for selecting participants is determined by the aim of the research. In purposeful sampling, the sampling frame (or population) is viewed as a resource from which the smaller sample is selected.

A range of different purposeful sampling approaches, each yielding different sample compositions, is available - for a complete description, see Ritchie and Lewis (2003) and Nicholls (2009b; also Coyne, 1997). A *typical case sample* approach was selected for this study to investigate PR measurement and evaluation among practitioners.

Typical case sampling entails creating a profile of what is 'normal' or average according to previously known information about the population. This typical case can be defined in various ways such as the most frequent case, the average of a distribution range, or a composite ideal of a phenomenon (Koerber & McMichael 2008:460). The researcher tries to select the most diverse group of individuals in a typical case (typically according to averages of distribution), aimed at achieving representativeness or comparability (Teddlie & Tashakkori, 2009:80; see also Ritchie, 2003; Teddlie & Yu, 2007; Koerber & McMichael, 2008; Etikan *et al.*, 2016; Onwuegbuzie & Collins, 2017).

By selecting a typical case sample, the 'average' PR practitioner's views and perceptions on the constructs identified in Table 4.4 can be investigated in detail to enrich the data gathered from this population in the quantitative phase of inquiry. The most important guiding principle for purposeful sampling is, according to Koerber and McMichael (2008:464), maximum variation. This means that the researcher must include people that represent the widest variety of perspectives possible within a specified range. Selecting a typical case sample will yield the best results for representativeness of the population (bearing in mind that the purpose of this study's qualitative research is mainly to gain deeper insight and understanding of quantitative data, not representativeness or generalisability).

The typical case sampling approach for this study was implemented among participants in the quantitative phase of this study, from the population described in Section 4.5. Sixteen (16) typical cases for PRISA-affiliated practitioners and South African PR practitioners that participated in the quantitative phase of research were identified and invited to participate in qualitative semi-structured interviews, based on determining the typical case.

The survey results were divided into questions relating to demographics and those relating to coded PR practice and measurement and evaluation constructs. The values from the coded responses were summarised per construct and a box plot diagram was created to show the distribution of answers. It was decided that in order to be a candidate for the interviews, a respondent should fall between Q1 and Q3 (i.e. between the 25th and 75th percentile of the data distribution), thereby ensuring a suitable variety of respondents while greatly limiting the influence of outliers. Three theoretical sets of responses were calculated in which the theoretical respondent answered exactly the value of Q1, Q2 and Q3 respectively for each construct. The respondents' combined scores for each construct were compared to that of the theoretical response (Q1, Q2, or Q3) for the same construct, thereby identifying those respondents who best represent the theoretical results across all constructs. Using this method rather than simply taking the respondent's average score for all constructs favoured respondents whose answers showed the same tendency across all constructs over those respondents whose answers were sporadic and just averaged out to the theoretical result set. The theoretical result sets for Q1, Q2, and Q3 respectively are illustrated in Figure 4.3 and Table 4.8:

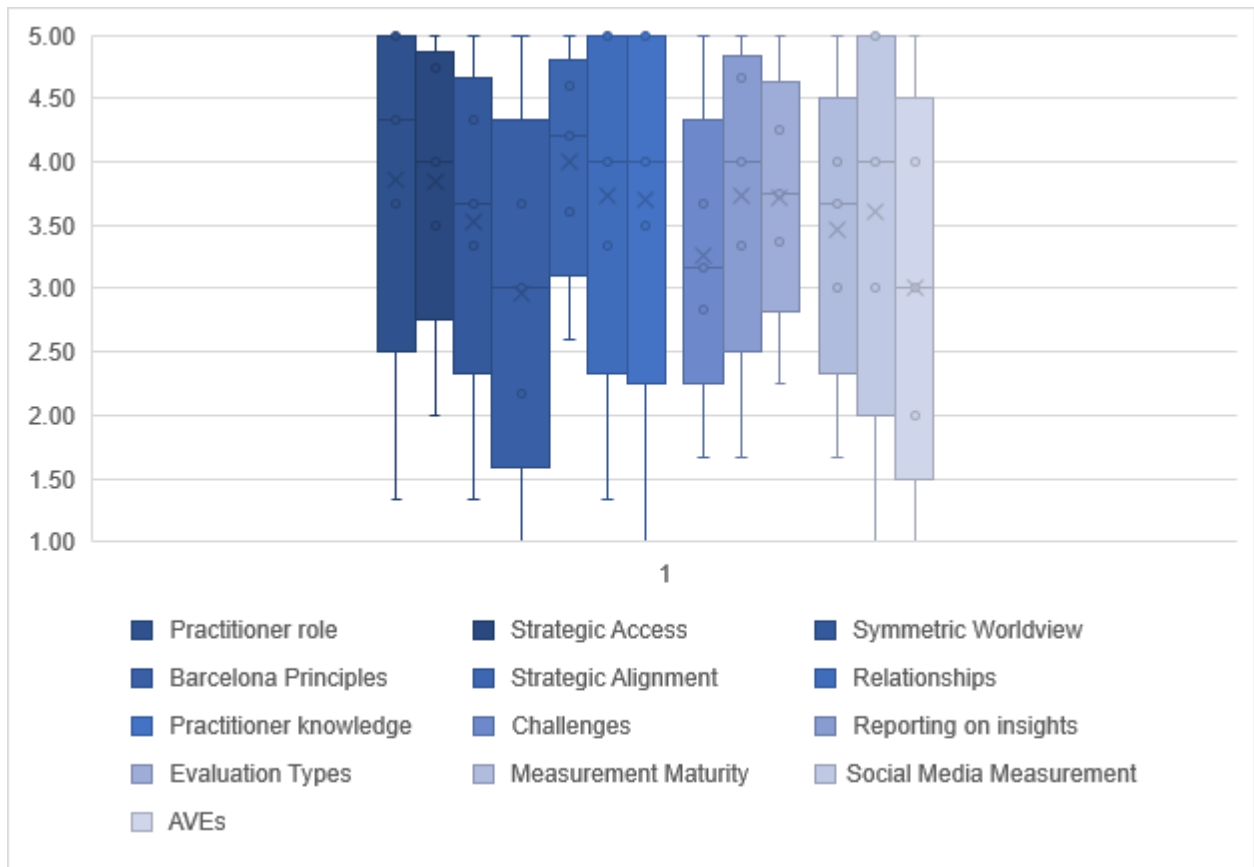


Figure 4.3 Box plot diagram of responses per construct

Table 4.8 Theoretical response set for Q1, Q2, Q3

Construct	Q1	Q2	Q3
Practitioner role	3.67	4.33	5.00
Strategic Access	3.50	4.00	4.75
Symmetric Worldview	3.33	3.67	4.33
Barcelona Principles	2.17	3.00	3.67
Strategic Alignment	3.60	4.20	4.60
Relationships	3.33	4.00	5.00
Practitioner knowledge	3.50	4.00	5.00
Challenges	2.83	3.17	3.67
Reporting on insights	3.33	4.00	4.67
Evaluation Types	3.38	3.75	4.25
Measurement Maturity	3.00	3.67	4.00
Social Media Measurement	3.00	4.00	5.00
AVEs	2.00	3.00	4.00

The actual individual responses were compared to these theoretical responses and the closest matches were contacted for interviews. The percentage match was calculated as a function of the inter-quartile variance (Q3-Q1) for each construct and the total match is an average of the match for all constructs. The qualifying respondents and their match percentage scores are set out below:

Table 4.9 Sample of respondents matching Q1

Respondent	Q1 match	Demographic match
8*	82%	84%
102*	77%	84%
1*	76%	80%
3*	75%	60%
95	73%	85%
87*	70%	85%
68	68%	76%
86	68%	68%
4	66%	82%
38*	65%	72%
25	64%	70%
39	63%	70%
89	63%	77%
45	62%	85%
47	62%	83%
57	61%	92%
16	60%	86%
34	60%	86%

* Respondent qualifying as interview participant

Table 4.10 Sample of respondents matching Q2

Respondent	Q2 Match	Demographic match
81*	83%	95%
24*	62%	79%
85*	62%	76%
93	62%	97%
38*	61%	72%

* Respondent qualifying as interview participant

Table 4.11 Sample of respondents matching Q3

Respondent	Q3 Match	Demographic match
101*	66%	64%
75*	66%	71%
96*	65%	74%
27*	60%	73%

* Respondent qualifying as interview participant

This comprised the final typical case sample of 16 possible participants set out in Table 4.12:

Table 4.12 Final sample of qualifying interview participants

Respondent	Q1	Q2	Q3
1	76%	36%	48%
3	75%	27%	38%
7	46%	12%	55%
8	82%	5%	76%
24	58%	62%	11%
27	8%	1%	60%
38	65%	61%	8%
75	28%	43%	66%
81	58%	83%	12%
85	46%	62%	36%
87	70%	50%	21%
91	58%	54%	4%
96	11%	38%	65%
99	45%	55%	43%
101	33%	39%	66%
102	77%	11%	47%

This phase of inquiry aimed to conduct 10 interviews with typical case sample respondents as described above, or until saturation⁹⁵ was reached (the complete interview recruitment process is described in the following section). This number of interviews was deemed both manageable and functional, as purposeful sampling in qualitative research is also designed to select a small number of cases that will yield the most information about a particular situation (Teddlie & Tashakkori, 2009:83).

Unfortunately, this creates a contrast, as the most dangerous pitfall of purposeful sampling is low diversity and that the final sample may not represent the variation of the population. Thus, balancing representation with a small number of cases that allow for in-depth inquiry is difficult. In this study's mixed-methods design, the quantitative phase helped to balance this by providing more variation and more data and the qualitative sample built on this data - it is not expected to sustain the entire study's findings by itself. Another danger of purposeful sampling is that researchers can use this method to construct a sample that would give them the information they want, in order to achieve the results that they want. This study countered this threat by treating data anonymously and transparently describing the method used to select the typical case. Purposeful sampling requires the researcher

⁹⁵ See Teddlie and Yu (2007:86-87) on saturation in mixed-methods research designs. They define saturation as the point where a range of ideas have been heard and no new information is presenting itself from the qualitative method. See also Saunders *et al.* (2009:235).

to describe their purpose and explicitly state how their selected sample fits that purpose (Koerber & McMichael, 2008:464; Nicholls, 2009b:639), as was done in this section.

4.6.2.3. Interview guidelines design and interview process

With semi-structured interviews, the interviewer does not assume enough answers to be able to preformat them (like with structured interviews) but also does not allow the interview to become an aimless discussion (Nicholls, 2009b:640). Interview guidelines were developed to guide the discussion for semi-structured interviews.

With due consideration for the purpose of this research method in the research design (expanding the understanding of quantitative data), the research instrument (semi-structured interview guidelines) was developed to further investigate many of the same concepts that were included in the quantitative phase of inquiry in this study (see Table 4.4). The interview guidelines (see Appendix B) were initially developed according to the same constructs used for the quantitative phase of inquiry and finalised *after* statistical analysis of the quantitative data (see Section 4.4). Points of further inquiry were identified from data analysis and incorporated into the interview guidelines, aiming to gain a deeper understanding of how South African PR practitioners measure and evaluate their efforts, and exactly what (and how) certain factors and challenges influence their adoption of standardised measurement and evaluation. However, as mentioned at the start of this section, the researcher does not assume enough answers in order to exactly determine preformatted constructs – the researcher thus used guiding concepts (see Table 3.8) but a tabular transcription of the transcribed interviews identified the constructs that emerged naturally from participants' answers.

After the interview guidelines were created for interviews to be conducted with the sample described in the previous section, the 16 identified participants from the survey were emailed and invited to participate in a one-hour interview. Of these contacted potential participants, seven agreed to participate in interviews – however, one of these seven practitioners had to reschedule several times and ultimately could not participate due to their schedule not allowing for a personal interview and they were not willing to participate in a remote interview via telephone or electronic communication. The six interview participants that were willing and able to participate indicated that they preferred to schedule the interviews over video platforms of their choice. As such, two interviews were conducted via Skype video chat, one interview was conducted via Google Hangouts, one interview was conducted via Zoom, and one interview was conducted over a WhatsApp video call. Interviews were scheduled as participants were available – four were conducted during the working day and two were conducted after working hours (past 16h00 in the evening).

Interviews were conducted over a two-week period and typically lasted 50-70 minutes, and were recorded with a sound recording device and video recordings where possible (the only interview that could not be recorded on video was the interview conducted over a WhatsApp video call). The researcher created an interview guide table that contained all the interview guidelines with space for notes on each construct, printed out a copy for each interview, and made notes while conducting the interview on the information participants shared, the timing of the questions, and noted the details of the interviews. After each interview, the recordings were also transcribed verbatim with the help of *Otter* transcription platform. Overall, all six scheduled interviews were successfully conducted with no problems arising. However, most practitioners indicated strongly at the start of their interview that their anonymity must be protected at all costs and requested that no information they share could identify them, as they may share unpopular opinions and did not want other industry practitioners to know their practices.

As detailed in Section 4.4, the narrative weaving approach to data at interpretation and -reporting level entails that interview transcripts will be discussed alongside and together with quantitative data (see Section 4.6.2.5 for detailed information analysis in this phase of inquiry) with the theoretical statements drawn in Chapters 2 and 3 guiding the discussion. In this way, qualitative information can best highlight, explain, and complement quantitative data. To ensure qualitative information gathered with semi-structured interviews are of high quality, the authenticity and trustworthiness of the qualitative phase of this study are discussed next.

4.6.2.4. Authenticity and trustworthiness

For determining the quality of research in quantitative studies, validity and reliability are standard methods that can be applied to almost any research project (see Section 4.6.1.5). However, the nature of qualitative research causes difficulty in establishing standardised measures for validity and reliability. As such, many authors have conceptualised alternative frameworks for judging the rigor⁹⁶ or “goodness” of qualitative research, or denounced using quantitative terms altogether⁹⁷ (Lincoln & Guba, 1985; Emden & Sandelowski, 1998; Emden & Sandelowski, 1999; Daymon & Holloway, 2002;

⁹⁶ According to Nicholls (2009b:644) the terms bias, reliability, sensitivity, and validity are synonymous with rigor. If the process used to create the theories qualitative research sets out to create is not perceived as valid, then they will not be a worthy contribution to a field’s body of knowledge.

⁹⁷ Some have argued for denouncing reliability and validity in qualitative research, replacing it with standards such as descriptive vividness, heuristic relevance and methodological congruence – concepts that can actually be applied to qualitative research and fit the nature of qualitative inquiry (Emden & Sandelowski, 1998:209). Qualitative research is, according to Emden and Sandelowski (1998:209), “distinguished by complexities and nuances far beyond those capable of being captured by traditional usages of reliability and validity”.

Fossey *et al.*, 2002; Morse *et al.*, 2002; Golafshani, 2003; Morse *et al.*, 2005; Lietz *et al.*, 2006; Walsh & Downe, 2006; Clissett, 2008; Lewis, 2009; Nicholls, 2009b; Poortman & Schildkamp, 2012; Venkatesh *et al.*, 2013; Elo *et al.*, 2014; Gergen, 2014; Leung, 2015).

While many of these authors have argued against applying quantitative terminology (rooted in positivism) to qualitative research, others have argued that the generally accepted terminology of validity and reliability⁹⁸ are the most effective, notwithstanding the fact that they are measures of objectivity - a trait not inherent to qualitative research (Daymon & Holloway, 2002:89).

An alternative perspective on validity and reliability in qualitative research is applied to this study's qualitative phase: *authenticity* and *trustworthiness* to ensure *rigor* (Fossey *et al.*, 2002; Morse *et al.*, 2002; Golafshani, 2003; Morse *et al.*, 2005; Daymon & Holloway, 2011; Elo *et al.*, 2014).

Authenticity refers to the use of appropriate strategies to report participants' ideas, the fairness of the study, and the research contributing to a better understanding and improvement of the world in which it lives.

Authenticity is brought about in this study through:

- Careful selection of research methods that will effectively reach and investigate the sample population.
- Ensuring fair chance of participation for the entire sample population.
- Standardised interview- and coding schedules for fairness.
- Fair sampling and interview participant selection.
 - Purposeful typical case sampling is applied carefully to ensure all participants that check the criteria set for these groups, are included.
- The literature review's focus on issues pertaining to current practice and pointing out the need for this research.
- Practice-oriented research objectives place this study in the realm of applied research, aimed at solving problems in the practice of PR.

⁹⁸ Babbie and Mouton (2011:124) emphasise the tension that exists between reliability and validity in social research. They explain that qualitative social research, often valuing 'richness in meaning' for very nuanced concepts, leads to reduced reliability because more variation and richness allowed in a concept create opportunity for disagreement and in that, reduce reliability.

Trustworthiness as alternative to validity relates to the credibility, transferability, dependability, and confirmability of the research (Clissett, 2008; Daymon & Holloway, 2011; Goldberg & Allen, 2015).

Credibility in this alternative perspective replaces internal validity⁹⁹ and manifest in people recognising their own truth of the findings in their own context. Transferability, replacing external validity¹⁰⁰, is facilitated by the researcher explaining how the findings of the study transfer to other settings. Qualitative research requires dependability, established through accuracy and consistency, to allow readers to evaluate the analyses the study make. Confirmability then shows that data is linked to the sources so it is clear that conclusions have arisen directly from them.

Trustworthiness, in this alternative framework for establishing rigor, comes to life in this study in the following ways:

- **Credibility:** Participants are asked to convey experience-based information, reflect on their own functions, and share information from their own frame of reference. Information gained from interviews were transcribed verbatim and conclusions were drawn from information, not inferences.
- **Transferability:** In reporting on findings and drawing conclusions, the researcher explains how this information is transferable by providing practical examples and suggestions.
- **Dependability:** Using consistent terminology and criteria throughout the research process, and paying close attention to present a report on findings and present conclusions in a consistent, logical manner. References to specific literature, examples, or findings were made throughout to ease understanding and judgment of the study's reporting. Standardised questionnaires and interview guidelines also heightened dependability of the research.
- **Confirmability:** Clear references, verbatim quotes, and data visualisation were applied to aid understanding and indicate linkages between content.

As mentioned in Section 4.6.1.4, it's important to bear in mind once again that reliability does not predict or guarantee accuracy (Babbie & Mouton, 2011:120). Researcher bias can still affect accuracy even if the study's reliability is flawless. Qualitative researchers that acknowledge, reflect on, and examine their own subjectivity will be able to define the terms of reliability and validity in the context of their study.

⁹⁹ Internal validity refers to the measure to which the research method measures the intended issues (Daymon & Holloway, 2002:90).

¹⁰⁰ External validity refers to generalisability – the measure to which the findings and conclusions can be applied to other contexts, settings, or populations (Daymon & Holloway, 2011:79).

Validity in qualitative research is, according to Lewis (2009) threatened by manipulating information to fit a certain theory and researcher bias or presence. From an epistemological point of view, the relationship between the researcher and the research plays an important role in qualitative research and its perceived rigor. The researcher, studying the constructs as close as they do and in such a personal way, cannot be objective. Therefore, reflexivity is important for the researcher to reflect on, admit, and take it into account in their own value judgments. This approach, where the researcher acknowledges their assumptions but consider them transparently, is called emphatic neutrality (Snape & Spencer, 2003:14). The factor of researcher bias will be considered over the span of this study and conveyed in a transparent manner if any such issues do become apparent. In reporting on findings, the researcher will avoid bias by only reporting on information and not drawing inferences that are not explicitly clear from the collected information.

Rigor in qualitative research strongly impacts generalisation. Generalisation from qualitative studies, drawing wider inferences from research findings, is much debated among scholars (Lewis & Ritchie, 2003:264; Polit & Beck, 2010). This is largely due to the ontological and epistemological variance in qualitative research, where different researchers will draw different conclusions based on their set of assumptions.

This study's design aims for representational generalisation to the population as described by Lewis (2003:265), as it is designed to produce results that may be generalisable to the specific population and all that shares its characteristics (see Section 4.5) in the form of normative guidelines for practice. This study admittedly cannot achieve theoretical generalisation¹⁰¹ as described by Lewis (2003:264) due to its limited scope of the research population and South African practice-oriented research objectives. As discussed in Section 4.6.1.2, interpretations from this study are only relevant to the population and respondents/participants. In aiming for representational generalisation, the most important factor to be considered for this study was careful sampling (see Section 4.6.2.2) to ensure representativeness is achieved as far as possible.

From this discussion, a checklist is compiled that states every action the researcher took over the course of this study to enhance rigor:

¹⁰¹ Lewis (2003:264) describes theoretical generalisation as an act of theory-building where new theoretical concepts or propositions are generated and deemed of wider, or even universal, application.

Table 4.13 Checklist for enhanced qualitative rigor

Measure to enhance rigor	Practical manifestation in this study
Authenticity	
Select research methods that can effectively reach the sample population and participants	Quantitative electronic surveys: researcher has access to the database of the population, all participants can be reached via email Qualitative semi-structured interviews: can be conducted via email, telephone, or in person Constructs for both instruments were gained from theoretical assumptions that created the framework for this study to ensure all important elements from literature are investigated with empirical methods Research population and sample is determined and drawn to effect maximum representation
Ensure a fair chance for participation for the entire sample population	No potential participants that fit the criteria are excluded from the population
Create standardised survey questionnaire	See Appendix A
Create standardised interview guide	See Appendix B
Select fair sampling methods	Purposeful sampling of typical cases
Include practice-based information in literature review that highlights existing gaps	See Chapter 3
Define practice-oriented research objectives aimed at problem-solving for practice	Research objectives are formulated to create normative guidelines for practice See Chapter 1
Trustworthiness	
Elicit experience-based information from participants	See Appendix A and B
Elicit reflection on participants' own functions and experience	See Appendix A and B
Elicit information that draws on participants' own frame of reference	See Appendix A and B
Transcribe interviews verbatim	Transcriptions available on request
Include practical examples and suggestions in drawing conclusions from information	See Chapter 6, a total of 7 practical examples and suggestions are made
Implement a logical structure in reporting on findings	See Chapter 5 (introduction) describing the structure for reporting on findings
Refer to specific aspects in literature and information when drawing conclusions	See Chapters 5 and 6
Implement verbatim quotes to highlight and illustrate findings and conclusions	See Chapter 5
Implement data visualisation to present findings	See Chapter 5 for figures created from data
Transparency	
Keep track and notes of any changes in the research process and why decisions were made	See Chapter 4 documenting any changes and the decisions made to that effect
Disclose any researcher bias that may become apparent during the research process	No researcher bias was identified during the research process

4.6.2.5. Information analysis approach

Information yielded from this study's qualitative phase of inquiry is analysed following the basic principles set forth by Nicholls (2009b). He proposes that most methods of qualitative analysis share some basic principles in the qualitative paradigm. He further argues that these steps define the quality of the output and the quality of each step then determines rigor. Following these principles, this study's qualitative data were analysed according to the theoretical principles set out in Table 4.14 as follows:

Table 4.14 Basic principles of analysis

Basic principles of analysis (Nicholls, 2009b)	Implementation in this study
Generating text from a body of raw data	Each interview was transcribed verbatim and in table format
An initial reading with tentative coding	Initial reading applied informal tabular coding that is consistent with the coding of the question's quantitative counterpart
Scrutinising text to ensure the researcher's ideas are correctly based on the information and applying detailed coding	Text was carefully analysed in order to structure information in line with the data from quantitative surveys
Using pre-existing theory to better understand the collected information	The process of careful analysis in the previous step was conducted to ensure the qualitative information is consistently grouped according to the concepts and constructs, as identified from this study's literature review
Further data collection and looking for patterns, basic categorisations and creating explanatory frameworks (proto-theories)	During the process of mixed-methods integration at reporting level, basic patterns, categorisations, and explanatory frameworks are created
Incorporating negative cases earnestly to provide sophistication and nuance	Negative cases were transparently included to provide sophistication and nuance where applicable

4.7 Limitations

Although this study was carefully prepared, the researcher is aware of certain limitations. First, this study's findings cannot be generalised to PR practitioners that are not described in Section 4.5 as part of the participants, nor PR practitioners outside South Africa due to the high level of contextualisation and localisation aimed for or practitioners in Stakeholder Relations roles. While industries in countries sharing similar industry traits than South Africa may still gain insights from this research, it is not intended to provide guidelines for any other than South African PR practitioners. Second, this study draws from the South African PR industry at a certain point in time. This research will have to be continued and expanded to ensure longevity – in five years' time, the South African PR industry may have evolved in such a way that the study's findings are no longer relevant. Third

and lastly, time and financial constraints also imposed limitations on this study – should the researcher have had more of these resources available, the study could have been expanded to include other research methods such as a larger population, case studies, focus groups, or more interviews as complementary research methods.

4.8 Ethical considerations

When conducting qualitative research, several ethical principles need to be considered such as voluntary participation, anonymity, doing no harm, confidentiality and misleading participants (Babbie & Mouton, 2011:521-526; see also Rossman, 2006). The North-West University's ethical standards were used to guide this study in ethical conduct (see Appendix C). Before conducting research among members, permission was obtained from gatekeepers of PRISA and ListPerfect to include members in questionnaires and interviews.

Throughout the study, ethical considerations were taken into account: participation was voluntary for all research methods employed and participants' identities and organisational information is protected when reporting results. All participants were informed of the study's purpose and encouraged to ask questions if there are any uncertainties.

This study is mindful of procedural ethics and ethics in practice, as described by Guillemin and Gillam (2004). *Procedural ethics* involves seeking the relevant approvals (from a relevant committee) while *ethics in practice* denotes the ethical issues arising when doing the research (Guillemin & Gillam, 2004:263).

Procedural ethics for this study was considered by gaining clearance from the North-West University Ethics Committee on the research proposal of the study. No changes were made to the research approach since the study was proposed and cleared in this manner. This study's proof of ethical clearance from the North-West University was made available on request to all participants (see Appendix C).

While no issues concerning *ethics in practice* arose during this study's empirical phase, the researcher was still mindful to conduct research in an ethical way. In order to ensure an ethical approach to sampling in mixed-methods research, this study adhered to the practical steps suggested by Onwuegbuzie and Collins (2007:390-391) as follows:

- Fully inform all sample members about any likely risks of potential consequences.
- Guarantee confidentiality.
- Avoid deception.
- Ensure participants' right to withdraw from the study at any time.
- Be mindful of demographic differences of participants in conducting research (religious, gender, culture, etc.).
- Minimise the use of any research techniques that may have negative social consequences.
- Consider the implications of excluding cases.

Because this study did not include vulnerable participants, minors, techniques that may be harmful, posed no risk to the researcher, nor had any foreseen negative consequences for individuals, the ethical considerations were considered with its due severity but none regarded a severe threat. The researcher further ensured ethical conduct by gaining informed consent from all participants and providing careful explanation of the purpose of the research and how its findings will be presented. All participants were granted the option to opt out at any point and the researcher's personal contact details were provided to all participants for enquiries during the research process. Participants remain anonymous and personal information gathered is disclosed to anyone who does not form part of the research team. Open and clear communication was considered paramount and participants were encouraged to ask the researcher questions during the entire process.

4.9 Conclusion

The aim of this study is to understand the South African PR practitioner's challenges and practice for measuring and evaluating PR efforts in order to set normative guidelines for implementing the Barcelona Principles in the South African PR context. The research design described in this chapter gathered information and data to answer each specific research question, guided by theoretical principles identified throughout the literature review.

Implementing the research design described in this chapter, this study was able to gather large amounts of quantitative data and then thematically explore South African PR practitioners' worlds to answer the specific research questions. As this chapter has shown, the research was conducted in the most responsible ways possible, taking care to understand each part of the research process and its implications, and conducting the research in an ethical manner.

The next chapter will describe the results and findings from collected data and information for PR measurement and evaluation in South Africa.

CHAPTER 5. RESULTS FOR PR PRACTICE AND MEASUREMENT AND EVALUATION IN SOUTH AFRICA

5.1 Introduction

This chapter presents and discusses the results of the study as relevant to the general research objective, which is to propose *how the Barcelona Principles can best be implemented in the South African PR practice*. In doing so, two specific research objectives are addressed. The specific research objective firstly addressed is *to determine how South African PR practitioners measure and evaluate their PR efforts and report to management thereon*. However, it was evident from the theoretical chapters of this study that it was first necessary to establish how they practise PR in order to determine and analyse the ways in which practitioners then measure and evaluate their efforts. The first major section of this chapter's discussion thus concerns PR practice as well as the measurement and evaluation thereof by the study's participants using descriptive statistics and interview information. The specific research objective addressed by the next major section is *to determine what factors and challenges influence South African PR practitioners' adoption of standardised measurement and evaluation practices*. This major section of the chapter's discussion will report on comparative analyses in order to answer this question.

In order to address these questions, this chapter reports the survey data that were obtained from 103 South African PR professionals and members of PRISA, and interview information from six semi-structured in-depth interviews conducted with a typical case sample of South African PR professionals that participated in the survey. As explained in Chapter 4, this study's mixed-methods sequential explanatory design type requires integration at reporting level - this chapter employs a narrative weaving approach to achieve this integration. As such, the results from quantitative surveys and qualitative semi-structured interviews are described and discussed together, using transcribed information from interviews to verify, complement, and explain data from quantitative results where possible in order to provide nuance and greater comprehension of the constructs investigated. Reporting empirical data and information in this way provides a highly contextual understanding of the empirical findings and enhances the trustworthiness of the empirical component of this study as a whole.

This chapter's discussion of results is split into two major sections, each consisting of subsections that describe and provide sub-conclusions for their different parts. Figure 5.1. sets out the chapter structure:

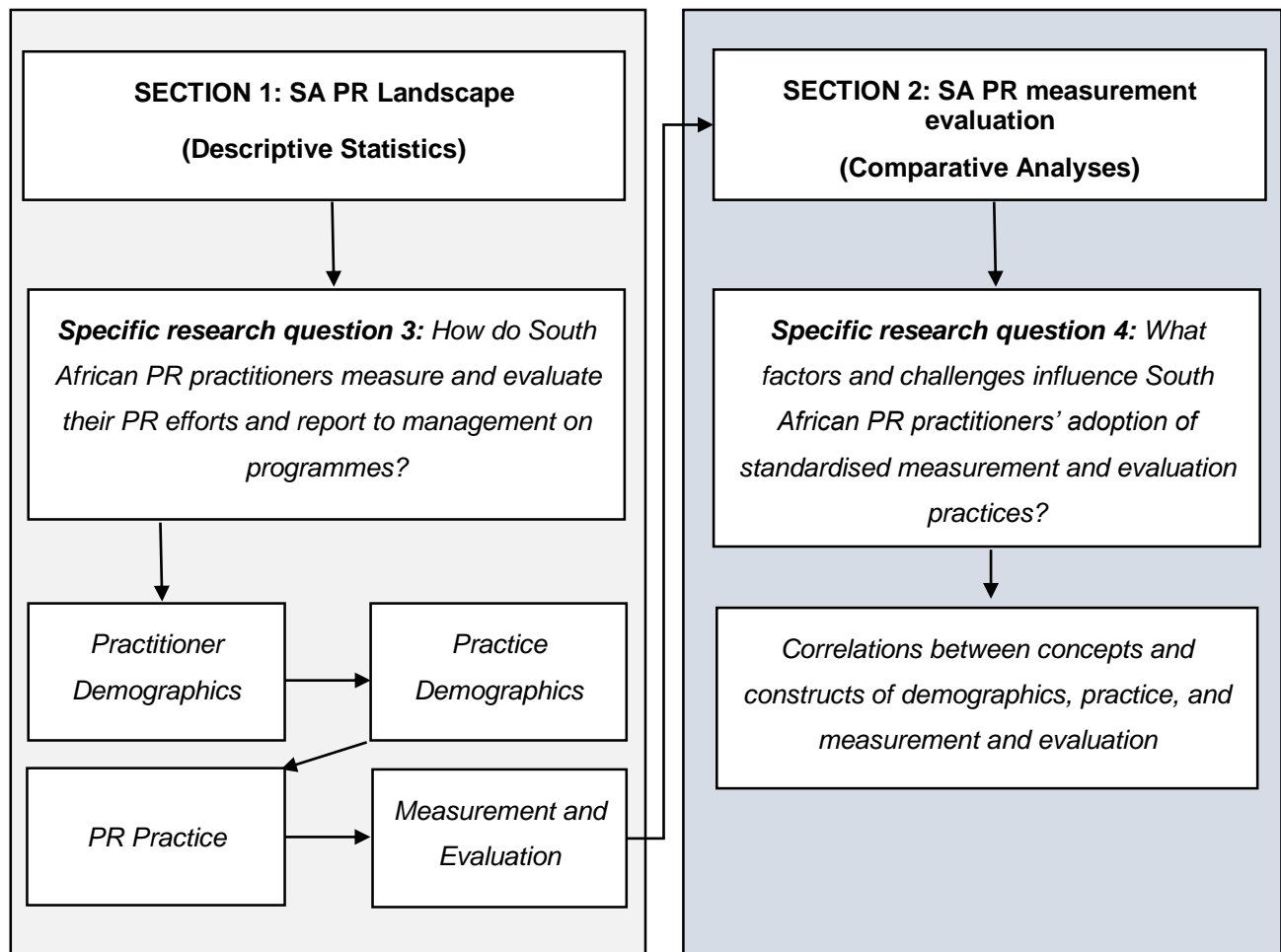


Figure 5.1 Results chapter structure

The first major section describes the South African PR practice landscape and is aimed at answering the third specific research question as follows:

Specific research question 3:

How do South African PR practitioners measure and evaluate their PR efforts and report to management on programmes?

This section first reports on the confirmatory factor analysis conducted to ascertain the factors validity and the reliability of the confirmed factors as part of the descriptive statistics, and the reliability of the data. Using survey data and interview information from interviewed practitioners, this discussion then reports the descriptive statistics of the confirmed constructs and concepts in four subsections to generate a high-level overview of what current PR practice in South Africa looks like as far as the research population is concerned:

1. **The first subsection** will describe practitioner demographics concerning gender, age, level of education, and industry experience.
2. **The second subsection** will describe practice demographics concerning respondents' team size, type of occupation in PR, and reporting lines.
3. **The third subsection** will describe practice-related constructs including the level of strategic access practitioners have, the relevant worldviews of organisations and clients, the role/s practitioners see themselves fulfilling, their level of strategic alignment, relationship building and -reporting, practitioner research capacity, and their reporting on insights.
4. **The fourth subsection** will provide descriptive statistics on the research population's PR measurement and evaluation, detailing their practice in terms of the Barcelona Principles, challenges, evaluation types, measurement maturity, social media measurement, and AVEs.

The second major section of this chapter concerns the South African PR measurement and evaluation landscape and is aimed at answering the fourth specific research question as follows:

Specific research question 4:

What factors and challenges influence South African PR practitioners' adoption of standardised measurement and evaluation practices?

This section will describe the practically significant correlations found among demographic and practice-related constructs and concepts, and constructs and concepts related to measurement and evaluation. These correlations are reported after the descriptive statistics and interview information in the first major section – this will allow for a deeper understanding of the correlations found, considering the detailed insights obtained from the descriptive statistics' report and discussion. This will enable identifying meaningful relationships between constructs, while having a better understanding of what these constructs mean to practitioners and why they answered in the way they did pertaining to each construct. Thus, the first major section provides context and interpretation to better understand the correlations reported in this second major section.

The survey data reported in this chapter were analysed with the assistance of the Statistical Consultation Services at the North-West University using IBM SPSS Statistics Version 25 (IBM, 2019) software. Frequency tables, correlations, and reliability calculations were used as described in Chapter 4 (see Section 4.6.1). As a quick reference to the reader, Table 5.1 below summarises the constructs and concepts of the two major components of this study. All constructs and concepts are discussed as descriptive statistics, while constructs relating to the South African PR landscape is correlated with South African PR Measurement and Evaluation constructs and concepts:

Table 5.1 Thematic constructs and concepts used for analysis and reporting

Theme	Construct	Concepts
The South African PR landscape	Demographics	
	Practice	Size of PR team
		Type of practice
		Reporting line
	Practitioners	Age
		Gender
		Experience
		Education
	PR Practice	
	Strategic access	Information access
		Decision-making
	Symmetric worldview	Stakeholder dialogue
		Innovation
	Practitioner role	Technician
		Manager
Strategist		
Strategic alignment	Measurable goals Secondary strategic alignment Primary strategic alignment	
Relationships	Stakeholder relationship building Stakeholder reporting	
Practitioner knowledge	Practitioner research capacity	
Reporting on insights	Generating suggestions Translating impact	
South African PR measurement and evaluation	Barcelona Principles	Formal process Awareness Implementation
	Challenges	Financial Time Knowledge Value Understanding/interest Standardisation
	Evaluation types	Formative evaluation Process evaluation Summative evaluation Quantitative evaluation Qualitative evaluation
	Measurement maturity	Outcome level Outtake level Output level
	Social media measurement	Social media
	AVEs	AVEs Multipliers

5.2 Descriptive statistics

This section of the chapter sets out the descriptive statistics for the constructs and concepts measured in this study. As discussed in Chapter 4, the final research population comprised of 103 fully completed surveys and six semi-structured interviews using non-purposive sampling techniques. Table 5.2 below sets out the descriptive statistics for the questionnaire items 4-47 that were measured as ordinal data using Likert-scale items (demographic questions measured as nominal values are excluded from this table):

Table 5.2 Descriptive statistics of questionnaire items

	Questionnaire items (<i>n=103</i>)	Min	Max	Mean	SD
Q4	My job entails technical implementation tasks such as drafting/designing communication material, crafting content for different communication platforms (social media, digital content publication, press releases, editorials, etc.), and distributing messages to stakeholders via different channels.	1	5	4,22	1,163
Q5	My job entails managerial tasks such as determining the stakeholders for and platforms to use in campaigns, develop communication plans and campaigns, oversee the execution of campaigns, compile reports on communication plans or campaigns, field media questions, or host press conferences.	1	5	4,29	0,956
Q6	My job entails strategic tasks such as determining and pre-empting any issues that may affect my organisation or client, decide the strategic direction of communication campaigns, translate the impact of stakeholders to Management, and report on communication success to top management.	1	5	4,27	1,050
Q7	I have access to the organisation/client's strategic information (such as business goals, strategic direction, product/service development, business performance, etc.).	1	5	4,38	0,830
Q8	My PR team is likely to be included in meetings or discussions where the organisation/client's strategic business decisions are being made.	1	5	3,72	1,200
Q9	My organisation/clients often engage with their stakeholders to gain their opinions on matters relevant to their stakeholders.	1	5	3,83	1,039
Q10	My organisation/clients communicate in an open and transparent way with their stakeholders.	1	5	3,99	0,902
Q11	My organisation/clients regularly bring teams together to share information that leads to innovation.	1	5	3,52	1,110
Q12	My PR team has a formal measurement and evaluation process for determining the success of our PR campaigns.	1	5	3,63	1,163
Q13	I am familiar with the Barcelona Principles for PR measurement and evaluation.	1	5	2,90	1,569
Q14	My PR team implements the Barcelona Principles for PR measurement and evaluation.	1	5	2,42	1,340
Q15	My PR team sets SMART (Simple, Measurable, Attainable, Realistic, Time-bound) goals when planning PR campaigns.	1	5	4,01	1,024

	Questionnaire items (n=103)	Min	Max	Mean	SD
Q16	My PR team uses benchmark data from previous campaigns (if it is available) to inform our goal-setting when planning PR campaigns.	1	5	3,88	1,123
Q17	When deciding on PR campaign activities, my PR team uses research and previous data to select activities that offer the best chance of reaching the campaign goals.	2	5	3,98	0,852
Q18	My PR team aligns PR goals with the business goals of the organisation.	2	5	4,51	0,712
Q19	When deciding on PR campaign activities, my PR team critically evaluates each activity to ensure it will help reach the campaign goals.	2	5	4,23	0,831
Q20	Building relationships with stakeholders is a key performance indicator of my current job.	1	5	4,28	0,890
Q21	My PR team reports on stakeholder relationships to indicate the success of our PR activities.	1	5	3,85	0,954
Q22	My PR team reports on how stakeholder relationships influence the business goals of the organisation.	1	5	3,68	1,157
Q23	I have a good understanding of different research methods (such as surveys, focus groups, content analyses, and interviews).	1	5	4,16	0,916
Q24	I am confident to apply different research methods (such as surveys, focus groups, content analyses, and interviews).	1	5	4,01	1,062
Q25	Financial restraints	1	5	3,84	1,135
Q26	Time, to undertake measurement and evaluation activities	1	5	3,45	1,178
Q27	Lack of research knowledge/expertise	1	5	2,80	1,271
Q28	Uncertainty over what constitutes the value of PR activities	1	5	2,64	1,320
Q29	Lack of understanding or interest from management/clients	1	5	3,12	1,199
Q30	Lack of standardised terminology or standard evaluation practices	1	5	3,41	1,240
Q31	My PR team uses data from PR campaigns' evaluation to make actionable business suggestions when reporting on PR efforts.	1	5	3,81	1,058
Q32	The information my PR team provides is used to help the organisation/client's leaders make better decisions.	1	5	3,87	1,026
Q33	My PR team explains to the organisation/client how external factors or issues may affect the organisation.	1	5	4,13	0,946
Q34	My PR team uses research in the planning phase of new PR campaigns already, so that we can create a strategy that best suits the current situation.	1	5	3,93	0,963
Q35	My PR team uses information and data from previous campaigns' performance when planning new campaigns.	2	5	3,91	0,887
Q36	My PR team tracks the effectiveness of PR activities while the campaigns are running, to identify problems immediately.	1	5	3,93	0,942

	Questionnaire items (n=103)	Min	Max	Mean	SD
Q37	My PR team adjusts our strategy during the course of a campaign when we detect any problems.	2	5	4,09	0,806
Q38	My PR team evaluates the success of our PR campaigns at its end to determine whether we have reached our goals.	2	5	4,23	0,757
Q39	My PR team uses our campaign evaluation to determine how the organisation/client has been affected by PR activities.	1	5	3,92	0,882
Q40	My PR team uses quantitative evaluation (such as surveys with hard data and statistics) to determine the success of campaigns.	1	5	3,23	1,230
Q41	My PR team uses qualitative evaluation (such as focus groups, content analyses, or interviews) to determine the success of campaigns.	1	5	2,99	1,248
Q42	My PR team measures the outcomes of our PR campaigns (such as behavioural changes in stakeholders, or changes in stakeholder's attitudes and opinions).	1	5	3,25	1,161
Q43	My PR team measures the outtakes of our PR campaigns (such as message retention among the target audience, or that stakeholders understand our messages).	1	5	3,17	1,216
Q44	My PR team measures the outputs of our PR campaigns (such as media placements, audience size, reach, impressions, fans, webpage hits, clickthroughs, views, downloads, or followers).	1	5	4,07	1,022
Q45	My PR team measures social media consistently with 7 media channels.	1	5	3,94	1,046
Q46	My PR team uses Advertising Value Equivalence (AVEs) when measuring and reporting on PR campaigns.	1	5	3,24	1,445
Q47	My PR team uses multipliers to enhance the value of Advertising Value Equivalence (AVEs) when reporting on this value.	1	5	2,46	1,420

From Table 5.2 it is seen that the data distribution (*SD*) for all ordinal questionnaire items was varied, ranging between $SD=0.712$ and $SD=1.569$. For the most part there was a relatively large standard deviation of >1.000 that indicates that there is large variety found in practice. The variety found in practice indicates that any measurement and evaluation framework must be able to accommodate this variety, or produce a way to navigate toward an ideal state if standardisation is the goal at hand. In terms of the item responses for questionnaire items, respondents' answers ranged across the entire scale, except for six items where no respondents strongly disagreed with the statement in question. These items related to Strategic alignment and Evaluation types. This indicates that these two constructs may be especially important to respondents in practice, as their practices thereof is closer to PR best practice across the board.

For these questionnaire items displayed in Table 5.2 above, a confirmatory factor analysis was conducted followed by reliability tests for the tested constructs in order to ascertain the reliability of the data that are reported in this chapter.

5.2.1 Confirmatory Factor Analysis of constructs and concepts

Confirmatory factor analysis using a principal component analysis extraction method was conducted in order to test the construct validity of constructs and concepts identified from literature and used to design this study's quantitative and qualitative research instruments. Table 5.3 below reports the results from these tests with the keys for interpretation indicated at the bottom of the table. As discussed in the previous chapter, this section reports the R-matrix determinant, sample adequacy, communalities, and total variance explained for the relevant constructs and concepts.

Table 5.3 Confirmatory Factor Analysis of constructs and concepts

Indicator		R-matrix Determinant	Bartlett's Test of Sphericity	Kaiser-Meyer-Olkin	Communalities	Total Variance Explained	Rotated Component Matrix
Q4	Technician				0,28		--*
Q5	Manager				0,80		
Q6	Strategist				0,70		
Q4-6	Practitioner role	0,539	p<.05	0,529		59%	
Q7	Information Access				0,68		--*
Q8	Decision making				0,68		
Q7-8	Strategic Access	0,874	p<.05	0,500		68%	
Q9	Stakeholder Dialogue 1	.568	p<.05	0,500	0,69	83%	--*
Q10	Stakeholder Dialogue 2				0,80		
Q11	Innovation				0,62		
Q9-11	Symmetric Worldview	0,379	p<.05	0,657		70%	
Q12	Formal Process				0,38		--*
Q13	Awareness				0,74		
Q14	Implementation				0,78		
Q12-14	Barcelona Principles	0,479	p<.05	0,589		63%	
Q15	Measurable Goals				0,54		--*
Q16	Secondary Strategic Alignment 1	.661	p<.05	0,500	0,60	79%	
Q17	Secondary Strategic Alignment 2				0,66		
Q18	Primary Strategic Alignment 1	.846	p<.05	0,500	0,41	70%	
Q19	Primary Strategic Alignment 2				0,49		
Q15-19	Strategic Alignment	0,262	p<.05	0,797		54%	

Indicator		R-matrix Determinant	Bartlett's Test of Sphericity	Kaiser-Meyer-Olkin	Communalities	Total Variance Explained	Rotated Component Matrix
Q20	Relationship Building				0,63		--*
Q21	Relationship Reporting 1	.492	p<.05	0,500	0,77	86%	
Q22	Relationship Reporting 2				0,79		
Q20-22	Stakeholder Relationships	0,328	p<.05	0,686		73%	
Q23	Practitioner Research Capacity 1				0,92		--*
Q24	Practitioner Research Capacity 2				0,92		
Q23-24	Practitioner Knowledge	0,302	p<.05	0,500		92%	
Q25	Financial				0,78		Two components extracted
Q26	Time				0,55		
Q27	Knowledge				0,56		
Q28	Value				0,62		
Q29	Understand/Interests				0,58		
Q30	Standardisation				0,56		
Q25-30	Challenges	0,308	p<.05	0,667		61%	
Q31	Generating Suggestions 1	.758	p<.05	0,500	0,53	75%	--*
Q32	Generating Suggestions 2				0,81		
Q33	Translating Impact				0,73		
Q31-33	Reporting Insights	0,381	p<.05	0,628		69%	
Q34	Formative Evaluation 1	.638	p<.05	0,500	0,60	80%	Two components extracted
Q35	Formative Evaluation 2				0,67		
Q36	Process Evaluation 1				0,62		

Indicator		R-matrix Determinant	Bartlett's Test of Sphericity	Kaiser-Meyer-Olkin	Communalities	Total Variance Explained	Rotated Component Matrix
Q37	Process Evaluation 2	.573	p<.05	0,500	0,69	83%	
Q38	Summative Evaluation 1	.657	p<.05	0,500	0,49	79%	
Q39	Summative Evaluation 2				0,60		
Q40	Quantitative Evaluation				0,67		
Q41	Qualitative Evaluation				0,73		
Q34-41	Evaluation Types	0,360	p<.05	0,764		63%	
Q42	Outcome level				0,73		--*
Q43	Outtake level				0,81		
Q44	Output level				0,20		
Q42-44	Measurement Maturity	0,545	p<.05	0,508		58%	
Q46	AVE				0,77		--*
Q47	Multipliers				0,77		
Q46-47	AVEs	0,715	p<.05	0,500		77%	
		=>0.00001	p<.05	< 0.5: not acceptable 0.5 –0.7: medium 0.7 –0.8: good 0.8 –0.9: very good >0.9: superb	>0.3	>50%	-- Only 1 component was extracted

Table 5.3 indicates that the constructs and concepts identified from literature is sufficient for further analysis in terms of construct validity where most tests provided adequate measures when interpreted according to the values provided at the bottom of the table.

At two points there were tests that showed insufficient results according to the interpretative values in Table 5.3. The practitioner role of technician and measurement maturity at output-level scored below the acceptable rate in terms of communality, indicating that variance in these questions is not sufficiently explained by the extracted factor. However, since these constructs were developed based on literature and only one factor was extracted it was decided to keep the originally intended structure.

5.2.2 Reliability of constructs and concepts

As the measurement instruments for this study were designed from constructs identified in literature and then confirmed through factor analyses, it is necessary to determine the reliability of the constructs and concepts that were used first in the quantitative survey, as these constructs were then also used to develop the qualitative interview guide. The descriptive statistics and Crönbach alpha coefficients (see Section 4.6.1.6.2 for the discussion on the theoretical interpretive framework of these statistics) for the internal validity of constructs identified in literature are set out in Table 5.4:

Table 5.4 Crönbach alpha coefficient and descriptive statistics for reliability of constructs

Construct	Crönbach alpha	Mean	SD
Practitioner Role	0,62	4,26	0,80
Strategic Access	0,50	4,05	0,84
Symmetric Worldview	0,78	3,78	0,85
Barcelona Principals	0,70	2,98	1,08
Strategic Alignment	0,78	4,12	0,67
Relationships	0,81	3,94	0,86
Practitioner Knowledge	0,90	4,08	0,95
Challenges	0,67	3,21	0,75
Reporting on Insights	0,77	3,94	0,84
Evaluation Types	0,82	3,78	0,65
Measurement Maturity	0,62	3,50	0,86
Social Media Measurement	--*	3,94	1,05
AVEs	0,70	2,85	1,25

**Only one statement tested this construct and therefor reliability could not be tested*

Table 5.4 indicates that acceptable Crönbach alpha coefficients of between 0.5 and 0.9 were obtained. Most coefficients from this study's analysis were located between 0.5 and 0.9, acceptable for basic research, thus these constructs are deemed as reliable (Gliem & Gliem, 2003; Osborne, 2014:112; Giannoulis, 2019). The lowest Crönbach alpha value of 0.5 for the construct of Strategic Access, could be explained by respondents' misinterpretation of the concept, as will be discussed

and illustrated later with the analysis of this construct. The construct Social Media Measurement consisted of only one statement testing the construct and the reliability score could not be calculated.

Table 5.5 below sets out the descriptive statistics and Crönbach alpha coefficients for the internal validity of concepts that contained more than one item:

Table 5.5 Crönbach alpha coefficient and descriptive statistics for reliability of concepts

Concept	Crönbach alpha	Mean	SD
Stakeholder Dialogue	0,788	3,91	0,88
Secondary Strategic Alignment	0,718	3,93	0,88
Primary Strategic Alignment	0,558	4,37	0,64
Stakeholder Reporting	0,823	3,77	0,98
Generating Suggestions	0,659	3,84	0,90
Formative Evaluation	0,750	3,92	0,83
Process Evaluation	0,785	4,01	0,80
Summative Evaluation	0,733	4,08	0,73

The Crönbach alpha values of the concepts ranged between 0.558 and 0.823, showing satisfactory internal reliability.

As was seen in Table 5.5, two components were extracted from the constructs challenges and evaluation types. However, upon further testing with a Pattern Matrix confirmed the reliability of these constructs as depicted in Table 5.6 and Table 5.7 as follows:

Table 5.6 Pattern Matrix for Challenges

Pattern Matrix		
	Component	
	1	2
Q25_Challenges_Financial		0,888
Q26_Challenges_Time	0,342	0,614
Q27_Challenges_Knowledge	0,743	
Q28_Challenges_Value	0,744	-0,364
Q29_Challenges_Understand_Int	0,739	
Q30_Challenges_Standardisation	0,721	
Extraction Method: Principal Component Analysis. Rotation Method: Oblimin with Kaiser Normalisation. Rotation converged in 4 iterations.		

Table 5.7 Pattern Matrix for Evaluation Types

Pattern Matrix		
	Component	
	1	2
Q34_EvalTypes_Formative1	0,669	
Q35_EvalTypes_Formative2	0,836	
Q36_EvalTypes_Process1	0,803	
Q37_EvalTypes_Process2	0,865	
Q38_EvalTypes_Summative1	0,688	
Q39_EvalTypes_Summative2	0,597	0,333
Q40_EvalTypes_Quantitative		0,819
Q41_EvalTypes_Qualitative		0,859
Extraction Method: Principal Component Analysis. Rotation Method: Oblimin with Kaiser Normalisation. Rotation converged in 4 iterations.		

After confirming the construct validity of data for the constructs and concepts used in the qualitative and quantitative phases of this study, the descriptive statistics will now be discussed for the practice-related constructs and concepts investigated in this study’s empirical inquiry.

5.3 South African PR landscape

This section, aimed at answering the third specific research question, provides a descriptive overview of the current PR landscape for the participants of this study relating to their demographic profile (practitioner and practice demographics), PR practice, and their measurement and evaluation.

The data and information presented in this section aimed to investigate the context within which PR practice – and its ultimate measurement and evaluation – takes place (see Section 4.6). By answering the third specific research question, it sets a framework of interpretation to create a more holistic understanding of measurement and evaluation activities and the related constructs. In Section 2.1 it was stated that “Without understanding how PR should be practised and how the value of PR manifests, one cannot hope to effectively examine its measurement and evaluation.”. The discussion of descriptive statistics that follows, aims to provide this understanding in terms of actual practice as well as measurement and evaluation practices and so create a holistic understanding of the South African PR landscape.

The section discusses the South African PR landscape in four subsections, as explained in this chapter's preamble. For each of the following subsections data will be discussed in a detailed statistical breakdown and complemented with qualitative interview information to offer explanation, insight, and interpretation of the construct at hand.

5.3.1 Demographic details of practitioners

The demographic details gathered on the quantitative phase of this study's participants consisted of gender, age, years of experience, and level of education. All items were categorical variables, and its frequency and percentages are reported. The demographic characteristics of the respondent group are summarised in Table 5.8 as follows:

Table 5.8 Descriptive statistics of practitioners (quantitative)

	Frequency (n)	Percent (%)	Cumulative Percent (%)
Gender			
Female	72	69,9	69,9
Male	31	30,1	100,0
Total	103	100,0	
Age Group			
21-25	4	3,9	3,9
26-30	6	5,8	9,7
31-35	18	17,5	27,2
36-40	16	15,5	42,7
41-45	19	18,4	61,2
46-50	14	13,6	74,8
51-55	18	17,5	92,2
56-60	3	2,9	95,1
61+	5	4,9	100,0
Total	103	100,0	
Experience in Years			
0-5	19	18,4	18,4
6-10	22	21,4	39,8
11-15	19	18,4	58,3
16-20	17	16,5	74,8
21+	26	25,2	100,0
Total	103	100,0	
Level of Education			
No formal education	10	9,7	9,7
Certificate or equivalent	11	10,7	20,4
Formal degree or equivalent	39	37,9	58,3
Post-graduate degree	43	41,7	100,0
Total	103	100,0	

Most participants in this study were female, resulting in a nearly 70%-30% split between female and male respondents respectively. Table 5.8 shows that 69.9% (n=72) respondents were female and 30.1% (n=31) respondents were male. While a more equal gender distribution could not be guaranteed due to the voluntary response sampling method applied, this trend does hold true with other major studies that showed that the global gender distribution in the PR industry leans strongly toward a two-thirds representation of women (ICCO, 2018:46).

The general age distribution of this study's participants showed participants representing every age group listed, while the largest portion of respondents were aged between 41-45 years (18.4%, n=19). However, this group is only slightly larger than the group of participants aged 31-35 years and participants aged 51-55 years (17.5%, n=18 for both these groups).

The largest portion of participants in this study have over 20 years' experience in the field of PR. This group constituted 25.2% (n=26) of the total participants. All age groups listed are represented in the total group.

The participants of this study represented all listed levels of education, but the largest group of participants indicated that they held a post-graduate degree in PR. This group constitutes nearly half of the respondents (41.7%, n=43). This is most closely followed by participants holding a formal degree or equivalent (39.9%, n=39). In total, 81.6% of the respondent group had a university education or qualification.

Using a typical case sampling strategy, survey respondents were selected and invited to participate in qualitative semi-structured interviews in order to gain a better understanding of the constructs and concepts investigated in the quantitative phase. To a larger extent interview participants reflected the demographic characteristics of the respondent group and constituted five female practitioners and one male practitioner ranging between the ages of 31 years old to 60+ years old. Of these participants, three had 21+ years' experience in PR practice and three others respectively had 0-5 years' experience, 11-15 years' experience, and 16-20 years' experience. As was the case with survey respondents, interview participants were highly qualified in PR – four participants held a formal degree or equivalent, one participant held a post-graduate degree, and one participant held a certificate.

5.3.2 Demographic details of practice

The demographic details of respondents' PR practice were determined in the quantitative survey in order to get a clear understanding of how PR practitioners are functioning in terms of their operations. This section showed the distribution of respondents according to the size of their PR team, the type of practice, and their reporting line in their organisation. This data comprised of categorical data and are reported on in terms of frequencies and percentages, detailed in Table 5.9:

Table 5.9 Descriptive statistics of practice (quantitative)

	Frequency (n)	Percent (%)	Cumulative Percent (%)
Size of PR Team			
1-5	62	60,2	60,2
6-10	19	18,4	78,6
11-15	11	10,7	89,3
16-20	1	1,0	90,3
21-25	2	1,9	92,2
26-30	1	1,0	93,2
31+	7	6,8	100,0
Total	103	100,0	
Type of PR Practice			
In-house practitioner	31	30,1	30,1
Communication agency	64	62,1	92,2
Freelance	2	1,9	94,2
Other	6	5,8	100,0
Total	103	100,0	
Reporting Line			
CEO/President/Managing Director	69	67,0	67,0
Marketing	24	23,3	90,3
Strategic planning	1	1,0	91,3
Operations	3	2,9	94,2
Human Resources	0	0	94,2
Legal	0	0	94,2
Other	6	5,8	100,0
Total	103	100,0	

While practitioners from all listed team sizes were represented among respondents, the majority of respondents indicated that they work in small teams of 1-5 people (60.2%, n=62) and the closest following group of respondents indicated that they form part of a PR team consisting of 6-10 people (18.4%, n=19). The majority of respondents practise PR as part of a Communication agency (62.1%, n=64). In-house PR practitioners constituted 30.1% (n=31) of the total group.

The majority of respondents report directly to the CEO/President/Managing Director of their organisations and clients (in the case of agency practitioners). This group reporting directly to senior management constituted 67.0% (n=69) of respondents, a figure higher than recent studies have indicated on a global scale - the 2019 *Global Communications Report* showed that globally only 45% of practitioners reported to the CEO/President of an organisation (USC, 2019:11). Other reporting lines that are prevalent at global scale such as Human Resources and Legal were included in this study, but no respondents indicated that they followed these lines of reporting. However, as is seen in Table 5.8 detailing the overall distribution for this study's respondents, the second most-reported reporting line is Marketing, constituting 23.3% (n=24) of respondents. This trend holds true with the global trend in 2019, where the second-most indicated reporting line among PR practitioners is Marketing at 28% (USC, 2019:11).

Following the typical case sampling strategy, the qualitative participants of this study reflected the quantitative respondents' demographic characteristics pertaining to their PR practice to a large extent. Five of the interview participants worked mostly in PR teams between 1-5 people, while one participant worked in a team of 6-10 people. Of these, two practitioners were in-house practitioners and four were PR/Communications Agency practitioners. All interview participants reported directly to the CEO/President/Managing Director and it was seen from interviews that all of the agency-bound practitioners were at the head of their own PR/Communications agencies and worked mostly with clients' CEO/President/Managing Director.

Following this discussion on the demographic details of this study's population in terms of personal and practice demographics, the next subsection will report on the South African PR landscape.

5.3.3 South African PR practice

This subsection builds on the descriptive statistics reported in Section 5.2 and sets out the constructs and concepts pertaining to South African PR practitioners' practice, measured as continuous variables. The qualitative information gathered from interviews is used throughout this subsection to explain and provide context for this quantitative data. Table 5.10 provides an overview of the descriptive statistics reported in this subsection:

Table 5.10 Descriptive statistics of PR practice

Construct	#	Concept	% Strongly Disagree (1)	% Disagree (2)	% Neutral (3)	% Agree (4)	% Strongly Agree (5)	Mean
Strategic Access	7	Strategic Information	1,0	1,9	10,7	31,1	55,3	4,38
	8	Decision Making	6,8	8,7	22,3	30,1	32,0	3,72
Symmetric Worldview	9	Stakeholder Dialogue 1	2,9	7,8	22,3	36,9	30,1	3,83
	10	Stakeholder Dialogue 2	1,9	3,9	17,5	46,6	30,1	3,99
	11	Innovation	4,9	12,6	29,1	32,0	21,4	3,52
Practitioner Role	4	Technician	5,8	3,9	11,7	19,4	59,2	4,22
	5	Manager	1,0	4,9	14,6	23,3	56,3	4,29
	6	Strategist	2,9	6,8	6,8	27,2	56,3	4,27
Strategic Alignment	15	Measurable Goals	2,9	5,8	16,5	36,9	37,9	4,01
	16	Secondary Strategic Alignment	3,9	8,7	19,4	31,1	36,9	3,88
	17	Secondary Strategic Alignment	-	5,8	19,4	45,6	29,1	3,98
	18	Primary Strategic Alignment	-	1,9	6,8	29,1	62,1	4,51
	19	Primary Strategic Alignment	-	2,9	16,5	35,0	45,6	4,23
Relationships	20	Stakeholder Relationship Building	1,9	-	17,5	29,1	51,5	4,28
	21	Stakeholder Reporting 1	1,0	4,9	33,0	30,1	31,1	3,85
	22	Stakeholder Reporting 2	4,9	10,7	26,2	28,2	30,1	3,68
Practitioner Knowledge	23	Practitioner Research Capacity 1	1,9	1,9	17,5	35,9	42,7	4,16
	24	Practitioner Research Capacity 2	3,9	4,9	17,5	34,0	39,8	4,01
Reporting on Insights	31	Reporting on Insights	4,9	3,9	26,2	35,9	29,1	3,81
	32	Generating Suggestions	1,9	7,8	24,3	33,0	33,0	3,87
	33	Translating Impact	1,0	5,8	15,5	35,0	42,7	4,13

From Table 5.10 above it can be seen that the mean scores for constructs and concepts relating to PR Practice are, on average, higher than a mean score of 3 – which indicates that most respondents leaned towards agreeing with the statements posed. As a high-level overview, this would indicate PR practices that are strongly aligned with the theoretical principles for PR best practice (Chapter 2).

While the quantitative data provided in Table 5.10 above indicates a proclivity for theoretical PR best practice among participants in this study, interview information indicated that this may not always be the case. From interviews, it was seen (as will be discussed throughout this subsection) that practitioners easily described their own practice as aligned with theoretical ideals, but that the scope of their practice was often actually limited to a more basic media liaison practice and that these practices were seldom integrated throughout organisations. To illustrate the general practice found among participants, one participant described the value of their work as follows:

Participant: *Think for me what's lucky.... And what kind of is an "aha" moment for prospective clients, is when I explained to them that if you have a big company you should have an advertising and marketing budget, let's hope and pray, that they could use a fraction of that spend on PR and generate a gazillion times more worth of coverage. So instead of paying R35,000 for one full page ad in one magazine, for argument's sake, one month, they could spend a fraction of that 35 grand with a PR person, who could try and get smaller bits of coverage in a variety of different publications and their reach will be so much bigger.*

This description sheds light on participants' views of the value of their own work. This value was often seen as the financial value of free media coverage and seldom strayed into a more strategic sphere where PR could be tied to organisational outcomes. However, in interviews, some participants were also quick to admit the need for them to provide more value to organisations and clients other than free publicity:

Participant: *...he [a friend of the respondent] runs an NGO for corporate clients, and he said his PR agency just got him tons and tons of coverage and it meant nothing to him, he just went "Eh, PR", you know, and I... I just don't want to be in that camp. There's enough...*

Another participant alluded to their disagreement of this basic view of PR and stated that:

Participant: *Because, for me, and the way that I've experienced it in the workplace, PR is just writing articles and making sure you've got media contacts.*

There appears to be discord among practitioners in what many of them firmly believe PR, and its value, to be, and others who are dissatisfied with the ways in which PR is practised currently. Against this backdrop, the theoretical constructs that aimed to ultimately describe PR practice in South Africa and its measurement and evaluation will now each be discussed using quantitative data and qualitative information.

5.3.3.1 Strategic Access

The construct of strategic access contained two concepts – access to strategic information, and inclusion in strategic decision-making. Strategic access, as discussed in Section 2.4, is a crucial component in order for PR to play a role in systemic viability – ultimately enabling balance between the organisation and its environment as was seen from the first theoretical statement:

Theoretical Statement 1: *The PR function contributes to systemic viability in helping organisations reach business goals when PR practitioners inform strategic decision-making processes*

In order to contribute to the cybernetic concept of systemic viability, the theoretical prescript for PR best practice entails firstly the practitioner’s access to strategic information and second the practitioner’s inclusion in strategic decision-making. Only then would the practitioner be enabled to bring about balance between the organisation and its environment and fulfil a core strategic role in an organisation. This is found even in the definition of strategic communication, as described in Section 2.3.1. as “the purposeful use of communication by an organisation to fulfil its mission” (Hallahan *et al.*, 2007). Tying the PR function to the organisational mission, then working towards realising that mission, is a core component in the reflective (Section 2.2) and functional (Section 2.3) paradigms.

From quantitative surveys, these concepts were indicated as follows by the study’s population:

Table 5.11 Strategic Access

Construct	#	Concept	% Strongly Disagree (1)	% Disagree (2)	% Neutral (3)	% Agree (4)	% Strongly Agree (5)	Mean
Strategic Access	7	Strategic Information	1,0	1,9	10,7	31,1	55,3	4,38
	8	Decision Making	6,8	8,7	22,3	30,1	32,0	3,72

As far as respondents have access to the strategic information of their organisations/clients, most respondents indicated agreement that they have access to strategic information (86.4%, n=89). On the other hand, very few practitioners cumulatively disagreed or completely disagreed with the statement on access to strategic information (2.9%, n=3). Overall, then, the quantitative results show that practitioners are set to access strategic information and theoretically, this would enable them to contribute to the systemic viability of the organisational system.

However, it was evident from the interviews that this access to strategic information is often limited to only that which pertains to the PR practitioner’s activities and services, or that it is difficult to come by. Some participants indicated that this matter varies greatly depending on the client, where some are reluctant to share their strategic business insights with the PR agency. One participant explained:

Participant: *And sometimes they hold their cards close to their chests... [...] so something’s going on behind the scenes and I’m like “Okay cool, let me know when you’re ready.”*

Other participants provided further clarification on this matter, indicating that they can get access to strategic information, but it is difficult and they have to find ways to make it happen. One in-house practitioner explained:

Participant: *We're like FBI agents, when it comes to those industry meetings. [...] But we also, you know, we'll just stand close by taking pictures and then listen in. I know it's wrong, but we listen to the conversations to get a rough idea of what are the issues plaguing the guys are.*

Even if strategic information is not shared openly with practitioners, some participants indicated that reporting to or working closely with the client's top management enables the practitioner to get closer to their thinking, which helps them gauge how to work with the particular business in delivering PR services:

Participant: *Yeah, they do. Because they're smaller, they're start-ups, so I typically work with the CEO or the guy that started the business. So that works for me because I can get close to their thinking. And then also what their expectations are.*

One participant emphasised the importance of long-term client relationships in this regard, stating that the longer they work with a client, the more comfortable they are to share their strategic information. They insisted that working with long-term clients "definitely" helps them to get access to strategic information, as the relationship between the client and the agency grows into a more trusting relationship. This participant also held that their reputation in the industry aided strategic access to clients. However, most participants who were agency-bound practitioners indicated that they have high strategic involvement and access, but it then became clear that this was only as it pertains to their services. Multiple interviewees explained that their clients would readily grant them access to strategic information when it comes to what outcomes they require from PR services, but not beyond that. One interviewee explained this as follows:

Participant: *I think it comes out in our conversations. I'm not included in strat sessions. [...] for PR I am, not business strats. Then they'll talk to me. [The client] will tell me what they, you know, how many people they want to, how many clients they want to reach, these are sort of big corporate clients, then we sort of discuss what the best way of leveraging that goal is gonna be.*

It was also seen, however, that operating strategically is important to participants. One interviewee described the necessity for strategic access, but then reverted back to a more functional description of how that access is utilised:

Participant: *Because with PR its always operating in a broader context. You can't just have an idea that works in a vacuum. By asking the why – why this product, why this service, why this business, what difference is it gonna make and why is it here? And then from that you develop an understanding of... because the entrepreneur has typically done a lot of homework around competitor analysis, around, the need and the business, to then work with them and identify their audience, identify the*

messages, identify the best way, the relationships they have, the relationship ecosystems that they have, and then leverage and try and see how best to reach those audiences. What mechanisms you use.

Considering this quote in the theoretical context of strategic alignment (Theoretical Statement 2), strategic access would (ideally) be utilised in order to leverage business outcomes as an act of primary strategic alignment (see Section 2.3). From the quote above it appears that strategic access is more often leveraged for secondary strategic alignment, an act of aligning PR activities with PR goals.

In contrast to these views, in-house practitioners that were interviewed indicated a very high level of strategic involvement, but this was largely informal and attributed to their organisations' nature and a highly transparent culture where information-sharing is the norm:

Participant: *Yeah, because you're not profit driven, the lines of reporting, bureaucracy, all of that coming from something as, you know, a global company with strict rules and reporting lines and bureaucracy. All that's gone. This is more of a flat management system. I'm like, the CEO will come into your office. And I mean, even just that took me a year, to go into his office and talk to him.*

Participant: *I think my interaction, reporting to the person I'm reporting to now, it's quite great because she sits on the Africa board. And she has insight as well into the SA board, of course. So anything that's happening from, strategically, from [umbrella company], I would know about. We would know "okay, this is coming, this is what we need to do from [their business department]. Although, our Managing Director as well, she does do a lot of sessions where she kind of, cascades information. But from a holistically executive office there's a lot of town hall sessions, so the CEO or the Deputy CEO will be giving an overview of what's happening, because they have insight from globally.*

These situations, described by in-house practitioners, allude strongly to symmetric worldviews held by organisations (discussed next in Section 5.3.3.2). A symmetric organisational worldview may thus be seen as a contributing factor to strategic access among the study's population, in keeping with the theoretical ideal described in Section 2.3.

In terms of respondents' inclusion in strategic decision-making with their organisations/clients seen in Table 5.11, the survey respondent group was a bit more divided yet still leaned strongly towards agreement, with a cumulative 62.1% (n=64) of respondents strongly agreeing or agreeing with this statement, while a cumulative 15.5% (n=16) respondents disagreed or strongly disagreed with this statement. From this difference, where respondents agree more to have access to strategic

information but less that they are included in strategic decision-making, it seems likely that situations arise where respondents are granted access to strategic information, but only after strategic decisions have already been made by their organisations/clients.

The qualitative interviews restated this, with many participants explaining that they were not consulted or included beyond their scope of PR work in terms of strategic decision-making. Their PR activities are thus more reactive, executing only on what decisions were already made by the organisation or client (as described above). However, as it pertains to PR activities, their level of decision-making was heightened, with many of respondents' clients and management structures relying on their expertise to make decisions and execute on PR campaigns at technical level.

These conversations with respondents consistently related strongly to a role of trusted advisor, a factor mentioned by multiple interviewees. Practitioners believed their involvement in strategic decision-making to be relatively high, and that they were able to influence decision-making to a large extent, but in explanations it came forth that this was mostly in a technical sense of advising on what campaigns, approaches, and activities would be most effective, or even educating constituencies on what PR is.

Participant: ...I had a meeting yesterday with someone and they're doing a campaign going live next week and I looked at their website and I said "listen guys, where can people contact you", you know, and they're like "no if you scroll down it's at the bottom of the web page you'll see a 'contact us' and I'm like, well that's not gonna work, and they're like "well what do you mean?" and I'm like it has to be on the landing page in front. So now these guys have now gone out and changed their whole website because of something which I imagined everyone should know.

Participant: I think... I'm forever having to meet with people one on one to actually explain what PR is. People think they know. What frustrates me to no end is when people say "When will the adverts be in the paper?" I'm like "whoa, hold back". Advertising is paid for. They get very confused.

Participant: I think a lot of what I do is explain the differences between an advertorial, editorial, advertising, you know, and explaining all the differences and how they fit in and how they will work and etcetera etcetera etcetera.

Participant: So there is a lot of collaboration, actually. And because I'm working so closely I can look, this isn't working. This isn't gonna work. We can try it, but these are my reservations. You're more able to pivot, more able to tactically change things and offer another alternative.

Participant: *You know often they kind of give us free rein on the content as well. Like the journalists are really good, so we'll just have like an idea, and then we'll write them content. And then we'll send it to them and they're like "yeah I don't know, we want this and this changed", and then we're quite firm with them, we're like "guys, this is gonna work. Like, take it as it is, trust me. If we go back and forth, back and forth the message is just gonna get, like, muddled" and surprisingly enough, a lot of them just like, take our word for it. They're like "you guys are the professionals, you've done this" which is nice.*

From these various discussions it was seen that top management is comfortable trusting and relying on PR as trusted advisor for decision-making, but the scope of this is limited to PR activities, in most cases.

Thus, the two concepts contained in strategic access – access to strategic information and strategic decision-making – paint a coherent picture of PR practitioners' strategic access. From this discussion, the following points were seen:

- Quantitatively, most respondents indicated that they have high strategic access. Access to strategic information was regarded to be especially high, while participation in strategic decision-making appeared lower among respondents.
- Where practitioners have higher levels of strategic access to information, it is described within the context of a symmetric organisational worldview which is seen to facilitate this access.
- Practitioners generally have access to strategic information, but often only as it pertains to PR activities and services. This level of access is regarded sufficient for the services and activities offered in practice.
- Practitioners are regarded as trusted advisors to organisations, but this is again limited to technical advice such as which PR activities would work best, optimising communication platforms, or advising organisations on content and PR strategies. Access to strategic information is then used to inform and enable this role of trusted advisor.

The construct of a symmetric worldview held by organisations, which was here seen to play a role in practitioners' strategic access, is discussed next to gain deeper insight into the environmental context in which South African PR practitioners function.

5.3.3.2 Symmetric Worldview

In terms of the construct of a symmetric worldview held by organisations, stakeholder dialogue and innovation were the selected concepts to determine the degree to which respondents' organisations or clients are open and transparent, engaging in dialogue with their stakeholders, and being inherently innovative.

From literature it was seen that a symmetric worldview is a key influencing factor for strategic communication management (see Section 2.3) in that it creates innovation through collaboration and enables practitioners to engage in dialogue with stakeholders. However, previous literature indicated that South African PR practitioners often take a situational approach, applying the worldview most suited to their needs at a given time (see Section 2.3.3.2). This construct was captured with the fourth theoretical statement:

Theoretical statement 4: *Organisations must adopt a symmetrical worldview that supports innovation through collaboration, and allows for a participatory approach that enables dialogue with stakeholders.*

For this study, considering the theoretical support for a symmetric worldview to enable strategic communication management, it was necessary to try to identify the extent to which an organisational symmetric worldview manifests for the study's population. From the fourth theoretical statement, two concepts were isolated to measure in the empirical component of this study, and regarded indicative of a symmetric worldview – stakeholder dialogue and innovation. From the quantitative survey respondents, these concepts were indicated as follows:

Table 5.12 Symmetric Worldview

Construct	#	Concept	% Strongly Disagree (1)	% Disagree (2)	% Neutral (3)	% Agree (4)	% Strongly Agree (5)	Mean
Symmetric Worldview	9	Stakeholder Dialogue 1	2,9	7,8	22,3	36,9	30,1	3,83
	10	Stakeholder Dialogue 2	1,9	3,9	17,5	46,6	30,1	3,99
	11	Innovation	4,9	12,6	29,1	32,0	21,4	3,52

It was seen in Table 5.12 that survey respondents regarded their organisations/clients as mostly open and transparent in the way they engage with stakeholders – cumulatively 67% (n=69) indicated agreement with the statement, while a cumulative of 10.7% (n=11) indicated disagreement. Respondents, however, agreed more with the item of organisational dialogue with stakeholders – the largest proportion of respondents here, a cumulative of 76.7% (n=79), agreed or strongly agreed that their organisations/clients often engage in stakeholder dialogue, while a cumulative of 5.8% (n=6) disagreed or strongly disagreed.

Interview participants were largely in agreement that their organisations and clients adopted a symmetric worldview in terms of how they communicate and engage with stakeholders. In these conversations, the most important elements for practitioners were seen to be PR's role as an embodiment of the organisation's symmetric worldview and that a foundation of truth is important to PR practitioners in order to achieve this.

When it came to how organisational openness and transparency influenced the PR function, one participant regarded stakeholder engagement as a crucial component of their PR work – in this, the PR function embodies the organisation's symmetric worldview. Creating opportunities to connect with stakeholders, consistent engagement with stakeholders to gauge the industry's thoughts and feelings, and creating opportunities for stakeholders to engage with one another through hosting events and automated email communication were cited by one in-house practitioner as ways in which the PR function helps the organisation's symmetric worldview manifest:

Participant: ...one of our main objectives as well is to make sure that the guys in the industry can... make it that they feel supported, that they are, you know, it is a shitty industry to be in. [...] So what we do is we go out of our way to make sure that we get attendance at our events. So we've got this industry breakfast, we do two in Joburg, twice a year, then we've got one in Cape Town, one in Durban. And we've got a golf day, which the guys just kept thanking us saying that they thought they were the only ones going through a bad stage. They were thinking, are they doing something wrong, whatever. But on the golf course, we got them together to connect. And that's what we do.

...by constantly engaging, but constantly making sure if someone emails us, we email back, we have set up the communication.

This was echoed in other interviews, where one agency-bound participant that often engages in crisis communication regarded an understanding of different industry stakeholders' opinions and needs as "crucial". Another agency-bound participant admitted that it is often fickle, depending on organisational relationships, yet emphasised the connection between organisational honesty and transparency, and PR activities stating that PR messages should be built on a foundation of truth:

Participant: *I don't know. I don't really know how to respond to that... Because if they [startups] have a relationship with a corporate partner there's an inherent compliance required and they will have to defer to the corporate, especially if the corporate is listed, in what they can say and what they can't say. [...] And also we find that the truth always settles. You can never spin something unless there's a foundation of truth to it. You can highlight the positives but only on the basis that there's a substance of truth behind it.*

Internal communication was emphasised by an in-house practitioner in this regard, describing how their organisation's symmetric worldview manifests as their entire PR team would be called together and openly briefed on the company's position on certain topics whenever the need arose to engage with stakeholders:

Participant: *Because in how we react to publicity, we are also transparent. So you will also find those statements that we put out there, interviews that our CEO will be involved in, it's very transparent.*

[...] and I think what works well is the fact that anything that has a reputation risk, all people who are involved from a PR point of view within the organisation will get called in. We'll get called in, saying "this is what we're experiencing, whenever you get this query from the media, because you know everyone has their own [media] relationships, so should we be approached by a media person requesting information around these, this is our approach.

In terms of innovation as an indicator of a symmetric worldview, most quantitative respondents regarded their organisations/clients to be innovative – a cumulative of 53.4% (n=55) indicated agreement with this statement, and a cumulative of 17.5% (n=18) disagreed/strongly disagreed.

From interviews, it was seen that the level of innovation found in organisations/clients were regarded to be determined to some extent by the industry and nature of business. Innovation was highly attributed to organisations in the technology industry, where it is regarded as part of the industry's fabric. One participant explained the nature of their clients' work as follows:

Participant: *And they're [client] basically are trying to, like, revolutionize, like, ecommerce in the country, like they want to, like empower entrepreneurs to start businesses from home and they will facilitate the whole process from stock to delivery, so yeah. I think the people I generally deal with [...] they do consider themselves to be quite ahead of the game.*

However, innovation was also apparent in more traditional industries like finance and manufacturing and the importance of digital transformation to embody innovation were mentioned and in-house PR practitioners play a facilitating role in this:

Participant: *Then there's the digital transformation element. So that's supporting [industry] practitioners and say, what could change in the space that requires technology?*

For in-house practitioners and agency-bound practitioners across the quantitative and qualitative inquiries it was seen that a symmetric worldview is prevalent in South African business. From the quantitative agreement and qualitative interviews, it was seen that:

- Overall, quantitative respondents definitely leaned towards indicating a symmetric organisational worldview for their organisations or clients. Stakeholder dialogue was seen to be particularly prevalent, on the whole innovation in organisations were indicated to a lesser extent, yet still had a strong presence.
- PR plays an important role to embody and facilitate a symmetric worldview for organisations. As such, PR sets in place the activities and channels that allows for openness, transparency, and innovation.
- To a lesser extent, though, was this function tied back to a strategic function. For most participants the organisational worldview made their jobs easier, and they facilitated stakeholder engagement by generating publicity. It remained, for the most part, a rather technical activity. There were, for example, very little mentions of how a participatory approach that enables stakeholder dialogue enabled PR's contribution to reaching organisational goals.

Considering this, the role of the PR practitioner is an important determiner of how the PR practitioner can function in their environment. The investigation into this construct is discussed next.

5.3.3.3 Practitioner Role

The construct of practitioner role investigated the extent to which respondents conduct technical, managerial, and strategic tasks in their daily operations in order to indicate the role they predominantly fulfil. Previous literature on the South African PR landscape had suggested that South African PR practitioners often fulfil multiple roles at once, and that most practitioners fulfil a strategic role (see Section 2.3). In this study's theoretical discussion, it was also seen that this strategic role is crucial to realising strategic communication management and to contribute to business imperatives. This was stated as the third theoretical statement:

Theoretical statement 3: *The PR practitioner must fulfil a strategic role as part of the dominant coalition (or reporting directly to the dominant coalition) in order to access strategic information and influence strategic decisions.*

This study's quantitative component investigated the degree to which respondents fulfilled each of these roles, measured by their indication of the tasks indicative of each role which they conduct as part of their PR function. The quantitative survey respondents indicated this as follows:

Table 5.13 Practitioner Role

Construct	#	Concept	% Strongly Disagree (1)	% Disagree (2)	% Neutral (3)	% Agree (4)	% Strongly Agree (5)	Mean
Practitioner Role	4	Technician	5,8	3,9	11,7	19,4	59,2	4,22
	5	Manager	1,0	4,9	14,6	23,3	56,3	4,29
	6	Strategist	2,9	6,8	6,8	27,2	56,3	4,27

The results in Table 5.13 confirm previous research into South African PR practitioners' roles (Tindall & Holtzhausen, 2011) once more, with the majority of respondents indicating that they mostly conduct the tasks of all three specified roles and very few respondents indicating that they do not fulfil each of these roles. As such, it was seen that 59.2% of respondents strongly agreed with conducting technical tasks, 56.3% of respondents strongly agreed with conducting managerial tasks, and 56.3% of respondents strongly agreed with conducting strategic tasks. Few respondents denied that they distinctly fulfil the distinctive roles. As such, only 2.9% strongly disagreed with fulfilling the role of strategist, 1.0% for the role of manager, and 5.8% for the role of technician. The general indication of practitioner roles is used here for descriptive purposes, but these items will later in this chapter also be correlated to the factors and challenges influencing the population's adoption of the Barcelona Principles in the following section. Figure 5.2 below sets out the quantitative respondents' indication for each practitioner role as follows:

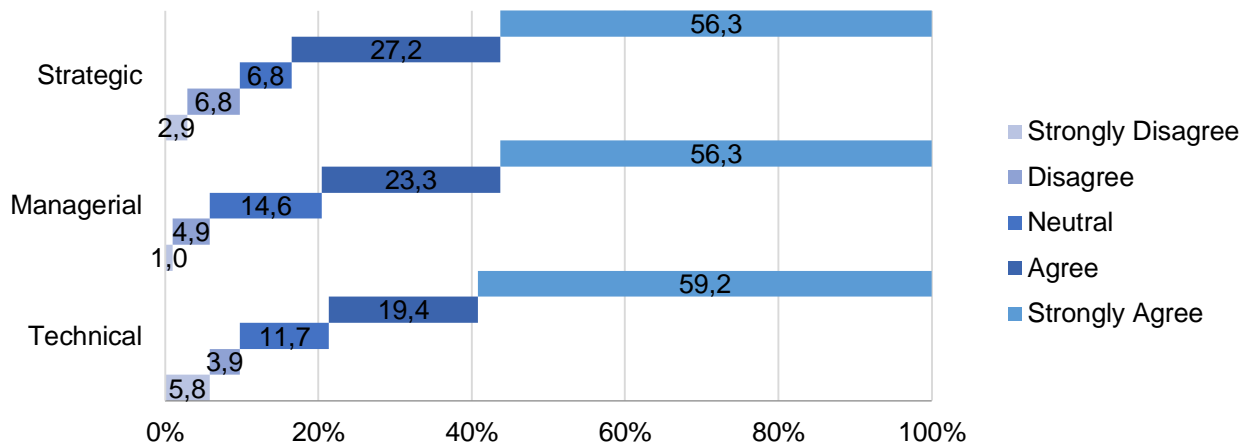


Figure 5.2 Practitioner Roles

The high frequency of the strategic role fulfilled by respondents may be linked to other demographic characteristics of this population, where it was seen that most respondents have many years' experience, are highly qualified, and are typically older with long careers in PR. In interviewing participants, it was found that most participants were at the head of agencies or high-level in-house practitioners. It could reasonably be expected of them to conduct more strategic activities.

However, considering the general level of experience and education seen among participants and later in interviews (see Section 5.3.1), and their executive reporting lines (see Section 5.3.2) it is curious that the role of technician gained the strongest agreement among participants – this indicates that practitioners who are highly educated, highly experienced, and even in very high positions in organisations still conduct technical tasks as a large component of their practice and thus fulfil a technician role. This may be attributed to the fact that the general size of PR teams is very small (see Section 5.3.2) and that high level practitioners are still very much hands-on in practice to conduct technical tasks as well as managerial tasks.

During the qualitative interviews, one interviewee explained that they strongly preferred this hands-on approach in order to provide quality assurance on the work that is delivered to clients. Another participant was the only person in their agency and naturally fulfils all roles to a larger extent, even though they make use of freelance services for technical work. From all interviews, however, the theme arose that PR practitioners are expected to be all-rounders in delivering campaigns, with very little specialisation in teams.

While enquiring into interview participants' roles were not a directly stated question on the interview schedule, information interviewees shared about their daily work served to illuminate two aspects – the activities they typically conduct, as well as the services/activities their work entails.

One agency practitioner interviewed indicated that their agency delivers a “fully integrated communications” service. However, many of these services were still centred around media placements and media relations, though it did extend to include internal communication as well. Interview participants generally fulfilled multiple roles as well, as was seen in the quantitative survey data, that spans over strategy to execution. Multiple agency-bound participants, in interviews, described their work to be mostly focused on media services as follows:

Participant: *So we create the copy. So it's good copy because we use tech journalists in the tech space. We... it depends, you know, we sometimes do Google Ads, we sometimes do social media, but our core product is content marketing. [...] it's a traditional PR service, I mean we write the concepts, we send it out [...] to a mailing list, we have relationships with publishers and radio stations, TV houses, and we try and get as much exposure as possible.*

Participant: *So in a nutshell, the sort of dominant focus is on media liaison, so clients pay for our time and obviously in exchange we try and generate as much free coverage in the media for them. [...] If clients have ad budgets I'll sort of take on the role of advising where they should be spending money to get the most bang for their buck.*

Participant: *Basically, I'm a one person show and I have freelancers that help me [...] So, depending on what's required, and three different web developers and people to help me follow up on the media and do the writing and someone to help me with my, you know, the on the digital side. So, yeah. And I am, you know, I think because of my years in the industry and mainly in tech space, I understand tech, and I understand business. And I have this cache of media content. It's those three together, is basically what the business is built on. And then leveraging the making the product, well, whatever the innovation is, motivating the media to publish.*

Participants that were practicing as in-house PR practitioners, however, described their functions very differently. From these practitioners it was seen that their functions were more integrated across many facets of communications and focused on the business at large. The PR functions described by in-house practitioners tended to span across many organisational imperatives such as organisational growth, marketing, technology, and research. Their roles, as they described, depicted their PR function in a more strategic light where PR ultimately manifest as a unifying element that spans over many different organisational functions:

Participant: *Um, I think a lot of people have marginalized PR, like I said, towards more of a handling the media side of things, which it's not about. PR also involves quite a bit of brand management and making sure that people see your brand in a very good light. [...] Because, for me, and the way that I've experienced it in the workplace, PR is just writing articles and making sure you've got media contacts. [...] But I think PR is the glue almost for me, that ties it together. Because ultimately, we are doing the marketing, we are doing the email communication, to connect with people. And that is relationship building. And in my mind, that's PR.*

Participant: *So if I have to take a specific normal day, it will be dealing with the PR agency in terms of identifying opportunities [...], we'll also look at what's out there, from a global point of view. We'll take some insight that came from global [industry communications], we'll take that and see can we, kind of, tailor it, tweak it to our SA market. [...] we put together articles and opinion pieces or Op Eds and say "this is what's going to change the [industry]". Because we've got data. [...] And then apart from that, there's research. So currently I'm working on a competitor analysis. So it's looking at what are our competitors doing that we're not, what is it that we're doing better than our competitors are not quite visible in that space...*

And kinda, this is the direction we want, the information to kind of steer or give us direction for our 2020 strategy. This is not only from PR or brand, so it's also including growth. So where are opportunities from a growth perspective. [...] But all of these kind of link into one, it's really about the imminence of the [business unit] team. But ultimately for the [company] at large.

From in-house practitioners' conversations it was seen that PR is, for the most part, seen as a function that spans across different business elements and fulfils a supportive role to connect the different elements of the organisation, and not necessarily a function on its own. In-house practitioners were thus seen to manage many different aspects, using PR almost as a tool to create harmony between business functions and operations.

The difference then, in how agency-bound practitioners and in-house practitioners view the PR function, was highlighted in interviews. To reconcile these two points of views – PR agencies' service offering limited to media relations and in-house practitioners' integrated functions, one in-house practitioner confirmed this difference in describing their experience:

Participant: *So I kind of moved away from PR as such. I do it, but we have actually appointed [a PR agency] to do our PR this year. But we obviously sat down with them and told them where we want to go, they've told us where they see us. But to be honest the only value they're adding is getting our name in an article.*

Throughout these discussions it became apparent that:

- Quantitative data show that nearly all practitioners fulfilled all three practitioner roles to nearly the same extent. There was a particularly strong indication for each role among most respondents.
- Most agency-bound participants purely offer media and writing services, but they regarded these services as the essence of PR. This included creating and distributing press releases, media planning, media buying for content publication (paid media), creating content for various client platforms such as blogs and printed media such as brochures and flyers, and to a lesser extent for social media. The strategic component of these practitioners' work related most prominently to media/publicity strategies.
- In-house practitioners, on the other hand, fulfil a much broader function. Their work typically indicated a more strategic approach where they would plan campaigns to reach business goals and conduct all internal and external communication to stakeholders, organise events, create content for all internal and external platforms, work to expand their audiences and stakeholder base, and ensure consistent messaging that promotes the organisation's goals to all stakeholders. This often happened in close partnership with the organisation's PR agency.
- In essence, it is seen that the majority of agency-bound participants regarded themselves to fulfil a highly strategic role, but only in media relations/services and not in a more holistic business approach. They would thus conduct strategic activities, but only as it pertains to media relations/publicity and not across a broader scope of integrated communication. In-house practitioner participants were the opposite of this.

This construct's quantitative and qualitative findings thus confirm previous research that found South African PR practitioners to fulfil all roles and fulfil strategic functions, but it clarified that among the study's participants the strategic extent of their practice is mostly limited in scope and seldom integrated across the entire organisation. Theoretically, the role of the PR practitioner is related to the level of strategic alignment of the PR function. This construct is discussed next.

5.3.3.4 Strategic Alignment

The theoretical foundation for strategic alignment, the act of creating a link between organisational goals and PR outcomes, posed that strategic communication management happens through the PR practitioner's strategic role to embody strategic communication management (see Section 2.3). Volk and Zerfass (2018) distinguished between primary alignment (aligning PR goals with that of the

organisation) and secondary alignment (aligning PR goals with PR activities) as part of this strategic process (see Section 2.3.1). Goal-setting is thus paramount to strategic alignment and was also determined to be crucial for measurement and evaluation (see Section 3.3.2). The construct of strategic alignment first enquired into practitioners' setting measurable goals, and then into primary and secondary alignment of PR with the organisation/client. Theoretically, goal-setting and strategic alignment were captured in the second and seventh theoretical statements as follows:

Theoretical Statement 2: *In order to contribute to organisational success through strategic communication management, strategic alignment must take place:*

- *Primary alignment between the goals of the organisation and the goals of the PR function must take place at grand strategy level.*
- *Secondary alignment between the goals of the PR function and the activities conducted by the PR function must take place at business/specialty level.*

Theoretical Statement 7: *To ensure strategic alignment, measurable goals and objectives must be set at the start of the strategic communication management process to enable evaluation for proving value.*

Theoretically, strategic alignment that enables measurement and evaluation starts with goal-setting. the data came forth as follows:

Table 5.14 Strategic Alignment

Construct	#	Concept	% Strongly Disagree (1)	% Disagree (2)	% Neutral (3)	% Agree (4)	% Strongly Agree (5)	Mean
Strategic Alignment	15	Measurable Goals	2,9	5,8	16,5	36,9	37,9	4,01
	16	Secondary Strategic Alignment	3,9	8,7	19,4	31,1	36,9	3,88
	17	Secondary Strategic Alignment	-	5,8	19,4	45,6	29,1	3,98
	18	Primary Strategic Alignment	-	1,9	6,8	29,1	62,1	4,51
	19	Primary Strategic Alignment	-	2,9	16,5	35,0	45,6	4,23

Table 5.14 indicates that the majority of respondents agreed that they set measurable (SMART) goals for their PR function, as a cumulative of 74.8% (n=77) either strongly agreed or agreed with this statement. A cumulative of 8.7% (n=9) disagreed or strongly disagreed. From literature (see Section 2.3) it was seen that setting measurable goals were a key factor for PR best practice, and it is concerning that multiple practitioners do not agree that measurable goals form part of their practice

even though they regard their practice to be highly strategic, as was seen in the discussion above relating to practitioner roles. Reported as a descriptive statistic here, it will be necessary to determine whether this specific practice impacts measurement and evaluation in the following section through determining any possible correlations.

Qualitative interviews provided nuance to this data and indicated that the goals practitioners set are often determined together with their clients' or organisations' management as the first part of strategy formulation, as this was mentioned by multiple respondents. Participants elaborated on this by explaining that this phase helps to set and determine expectations for PR activities, allowing especially agency-bound practitioners to gain clearer insight into what the client regards as important. One participant highlighted the importance of this activity:

Participant: *I always meet with a client first and identify what are their aims, what are their objectives, what are they actually trying to achieve? And how can PR help them do that. And I'm always very upfront and honest. If I can't help them or if I think they're actually wasting their time and money, I tell them.*

For one in-house practitioner, this goal-setting process was also used as a personal performance measurement, explained as follows:

Participant: *So we need the feedback. First of all, like you said, is for myself to see if I'm actually on the right track, if I actually know what I'm doing? Or should I like, stop my studies and move into a different direction. And it was a sense of pride. You know, if something's working and you measure it, and you constantly seeing the progress and stuff, you actually feel good about yourself, like, it's a bit narcissistic. But hey, you kind of feel cool about it. And then you can stop quickly if something's not working. So it's very good.*

In terms of primary strategic alignment relating to PR's goal alignment with organisational goals, it was seen that there was more tentative agreement, with 74.8% (n=77) respondents agreeing or strongly agreeing, while 19.4% (n=20) respondents were neutral and 5.8% (n=6) respondents disagreed and no respondents strongly disagreed on this concept.

This distribution of respondents' answers was, to some extent, clarified in interviews. Many interview participants indicated that they would typically plan their projects and campaigns around the organisation/client's goals and start this planning with a strategic session where the goals and expectations are provided by the organisation/client.

Participant: *The planning, literally, it's an open discussion. And we basically, just try to give them the best of what they want.*

However, multiple agency-bound interview respondents clarified that clients are often uncertain of their own goals and expectations, especially as it relates to PR's contribution to this. This inevitably made it harder for practitioners to perform primary strategic alignment and to ultimately contribute to reaching organisational goals. It also strongly placed them in a consultant/advisory role, where they are required to explain the value of PR and how it can aid the organisation in reaching their goals through this primary strategic alignment. One participant explained:

Participant: *People are often very keen to see you and you're like "Cool, I'm here, what do you guys wanna do?" and they're like no, they wanna be on these platforms. I'm like "Great, what do you want to communicate?" No they don't know. And it's like, okay. So they've got a mandate to market and do marketing and spend marketing budget but then often that person isn't... so often we'll sit and help them with strategy. We're like listen, here's what we're gonna do, we're gonna do a six month rollout, every month we're gonna do a piece on all these publications and this one will introduce the business, this next month we'll talk about how your [product/service] is better than the next, you know, that type of thing.*

In-house practitioners faced this situation to a lesser extent, where their integrated approach to communication as a whole allowed for much easier primary strategic alignment. One respondent explained:

Participant: *We made sure that the holistic strategy for the division itself, kind of mirrors what the overall strategy is. Because then it makes it easier to drill it down – from the division strategy, if we had to put together a growth strategy, the growth strategy is linked to the growth strategy for the holistic firm. If you take the brand strategy, it would support the holistic brand strategy. If you take the digital strategy, it should also support. So we try to make sure that we mirror that as much as possible so that we don't go on a tangent and come back saying 'oh, we were supporting this pillar'. Make sure you are supporting all the pillars.*

Regarding secondary strategic alignment, it was seen that respondents are very likely to use benchmark data and data from previous studies to inform their strategic planning, with 91.3% (n=94) respondents strongly agreeing and agreeing, though disagreement was still prevalent at a cumulative 18.1% (n=24).

From interviews it became apparent that the secondary strategic alignment process is often informal. One participant indicated in this regard that their experience allows them to go on “gut feel” in order to establish secondary strategic alignment, where their vast knowledge of their industry allows them to easily know what activities will work best for specific campaigns. This is interesting to note – in Section 2.3.1, Steyn (2000a) was quoted saying that in the absence of strategy, intuitive decisions will be made. Interview participants echoed this, explaining that their experience affords them a natural instinct of what is available and what to implement in different contexts and that there is considerable variety depending on different needs for agency clients:

Participant: *You know, we sort of just go through uhm... I don't have a list, I suppose, yeah. I also know what works, you know.*

Participant: *Yeah, we basically just ask them. [...] the planning, literally, it's an open discussion. And we basically just try and give them the best of what they want. [...] It really does vary client to client.*

Practitioners admitted their own room for improvement to improve strategic alignment, where they felt that strategic alignment happened on a gut feeling:

Participant: *But I think the energy of the business... I haven't got it down. I need to be more rigorous about it... I want to get there.*

Participant: *I know. I just... I just... I just... I just want to get to a place where I can say “Okay, this is what it's done for you” instead of working on that sort of resonant gut feel all the time.*

However, it was also seen from interviews that where this process takes on a more formal nature, it is often in agencies that offer only media-related services. In this case, they would use output metrics to inform their decision-making in the secondary strategic alignment process such as the number of readers of publications, the frequency of the publication, and the readership demographics (all provided by the publication). For in-house practitioners, secondary strategic alignment entailed reflecting on their previous campaigns' success and they relied heavily on their own previous reporting to inform this process. One in-house respondent indicated that budget allocations influenced this process, and they would select activities according to the best chances of success given the campaign's approved budget. In-house practitioners were overall seen to be much more structured in this process, taking more care to achieve integration during this phase already and selecting activities that are most suitable to the target audience and then apply amplification strategies to further reach target audiences and promote content:

Participant: *So if you're very involved in putting together touch points for each customer, you identify and understand that not every activity or platform works for everybody. [...] And for me, so just putting a press release and sending it out there, how about turning that press release into a video release, because you want to accommodate other target audiences. Also, why don't we just do a quick video interviewing whoever is the spokesperson? Because now it becomes more interesting for the media. [...] So it's our role as practitioners as well to kind of think, how can we amplify our communication, not only look at traditional, but how can traditional complement digital? How can digital complement traditional?*

Secondary strategic alignment thus plays a stronger, or at the very least more formal, role for in-house practitioners and is approached as integration with the entire communication function. It is also much more structured in in-house PR practice, where agency-bound practitioners were overall more tentative to describe a structured process and even reverted to an instinctual or needs-based process. Globally, linking business strategy and communication was found by Zerfass *et al.* (2018) to be the second most important strategic issue for PR practitioners, yet these findings did not show strategic alignment to be of that high importance among participants.

From interviews it was mainly seen that:

- Among quantitative respondents, their level of strategic alignment appeared quite high from survey data. Most prevalent in this construct was a strong indication of setting measurable goals. Primary strategic alignment was indicated strongly, and secondary strategic alignment was indicated to a lesser degree yet still relatively high.
- Measurable goals are set during strategy-formulation processes, mostly in close collaboration with clients and management or in strong alignment with the overall organisational strategy's goals.
- Primary strategic alignment is easily achieved when the organisation's strategy and goals are clearly defined and available to access. However, when this is not the case (mostly for agency-bound practitioners) it becomes less structured and harder to achieve.
- In media relations-oriented PR practice, secondary strategic alignment is largely based on publication figures and desk research. Many practitioners, given their experience, rely on instinct to determine and select the appropriate activities to be implemented, while budget allocation and content leveraging plays a role in in-house practitioners' decision-making for this process.

5.3.3.5 Relationships

From the theoretical discussion (see Section 2.4) the relational paradigm was seen to be a key factor in PR's ultimate contribution to organisational goals when the PR function establishes strong strategic relationships that leads to specific outcomes. This was captured in the fifth theoretical statement as follows:

Theoretical statement 5: *The PR function must establish strong organisation-stakeholder relationships in order to benefit from its outcomes and report on how it contributes to organisational excellence.*

Section 2.4.1 stated that stakeholder relationships are crucial for connecting strategy to ethics by ensuring that relevant stakeholders are included in strategic decision-making and that using their insights enhance value creation for PR. Furthermore, stakeholder relationships were regarded to be an outflow of strategic communication management (see Section 2.4) and it can then, theoretically, be expected that if true strategic practice is prevalent among participants then relationships would constitute an important aspect of their practice as well. To enquire into stakeholder relationship building, and the role it plays in respondents' practice, relationship-building was explored as three concepts: as a Key Performance Indicator (KPI) of the practitioner's current role, reporting on stakeholder relationships, and showing how these relationships influence the organisation/client's business goals. Quantitative results for this construct showed general agreement among respondents:

Table 5.15 Relationships

Construct	#	Concept	% Strongly Disagree (1)	% Disagree (2)	% Neutral (3)	% Agree (4)	% Strongly Agree (5)	Mean
Relationships	20	Stakeholder Relationship Building	1,9	-	17,5	29,1	51,5	4,28
	21	Stakeholder Reporting 1	1,0	4,9	33,0	30,1	31,1	3,85
	22	Stakeholder Reporting 2	4,9	10,7	26,2	28,2	30,1	3,68

Table 5.15 shows that the majority of respondents indicated that stakeholder relationship building is a strong KPI for their current position, with a cumulative of 80.6% (n=83) respondents agreeing or strongly agreeing with the statement, while only 1.9% (n=2) strongly disagreed. It's seen here that there was no moderate disagreement ("disagree"), and that respondents were mostly either neutral on this, or in strong disagreement. While this item showed very high agreement overall, the following items showed lower agreement in terms of reporting on these stakeholder relationships and showing

how it influences business goals. The largest group here was neutral, with 33.0% (n=34). Cumulatively, however, 61.2% (n=63) strongly agreed and that they report to their organisations/clients on these relationships. Disagreement was still low, with 5.8% (n=6) respondents that disagreed and strongly disagreed.

In terms of showing how stakeholder relationships influence business goals, the majority strongly agreed and agreed (58.3%, n=60). Closely following this group, it was seen that 26.2% (n=27) respondents were neutral, and a cumulative 15.5% (n=16) respondents were in disagreement (10.7%, n=11 disagreed and 4.5%, n=5 strongly disagreed). This provides an interesting picture, as most respondents strongly believe stakeholder relationships form an important part of their work but fewer report on it and show its impact on the organisation.

From the interviews, three themes emerged:

- When it comes to stakeholder relationships, quantitative responses indicated a strong presence of this activity in practice. Stakeholder relationship building was particularly high, while stakeholder reporting was reported to a lesser extent but still high in practice.
- The majority of agency-bound practitioners' clients did not require stakeholder relationship building *per se*, and did not request this in briefing sessions.
- The majority of in-house and agency-bound practitioners indicated that management and clients did not tie this activity to PR, while another interviewee indicated that large corporations often have stakeholder relations departments and thus it is not regarded as an activity owned by PR. One participant that forms part of a large organisation supported this, saying that these matters are largely handled by stakeholder relations departments or by division heads.

It should be queried then, how quantitative respondents so strongly feel that stakeholder relationships is a KPI of their work when it is not required of them. Furthermore, it could be questioned whether the PR function is truly using stakeholder relationships to create value, as was discussed in Section 2.4.1. This answer came from interviews, where it was seen that agency-bound practitioners often did not see relationships as quantifiable and so they regard output metrics such as high content consumption and returning audiences as an indicator of strong relationships. They would thus report on output metrics for this element, seldom presenting it as 'stakeholder relationships' to the client.

Participant: ...*identify the messages, identify the best way, the relationships they have, the relationship ecosystems that they have, and then leverage and try and see how best to reach those audiences.*

Participant: *And I also think something that I also make very clear, that the role of PR in terms of stakeholder management and relationship and media presence, is building reputation. It's not necessarily closing the sale for them. Maybe you get resonance in terms of "you must be a good company to be in this publication".*

Participant: *Yeah, so we've had one or two requests, basically. I mean, I don't know if social media would fulfil that function for certain companies, you know, because it's an engaging platform, maybe one or two requests to run social media, which we do. But no, generally not, they're just kind of happy for the exposure, and the writing we do for them. And I think they just kind of deal with everything on their own.*

In terms of specifically reporting on stakeholder relationships, one participant explained:

Participant: *Formally? No. Not really. Well, I think with... Okay. No. I think these are things that, these are services that maybe larger agencies with resources actually, uhm... A lot of this is informal, right? We need a framework to formalise this. I've introduced you to this person, how has this person leveraged, you know, have you got business from... And a lot if that is... ja... Ja.*

For in-house practitioners, stakeholder relationships featured more strongly and although it could not be quantified on its own, it was often tied to business outcomes such as increased memberships, event attendance, event partnerships, speaking opportunities, and interview requests. One participant explained this as follows:

Participant: *It's very informal, but we feel that if we manage relationships by constantly engaging, by constantly making sure if someone emails us, we email back, we have set up a communication. If someone clicks on membership info, there's an automation that constantly reminds them. like three days later, four months later, an email goes out to say, 'hey, so we know that you've looked at us, are you still interested?'*

Across both agency-bound and in-house practitioners, engagement was often seen as a strong indicator of stakeholder relationships. However, this engagement was most often described as audience-based metrics, and seldom regarded stakeholder *participation* as engagement. Outcome- and outtake level metrics such as direct enquiries about relevant topics, partnerships, social media engagement, as well as output-level metrics such as audience size growth, shares, and likes were considered by the majority of interviewees as indicators of this engagement. One in-house practitioner did, however, tie engagement back to their organisation's success and relevance to their stakeholders:

Participant: *I'd say it's about engagement, because that's how we measure it. Because, are our members, for instance, are they coming to the events? I mean, if they didn't feel that we were, you know, relevant or anything like that, they wouldn't be coming, we always make sure that there's an open platform for our members to actually, there's always a Q&A after, or an open discussion that we facilitate, because that's where we basically get a rough measurement of what is actually going on and how they feel and what they are getting from everything.*

Seeing as many interviewed agency-bound practitioners' functions and services so strongly focused on media-related activities, the researcher enquired into whether agency clients tend to require relationship building from PR agencies, whereupon one participant explained:

Participant: *I think typically, that's a very good question. Again, a lot of them, I don't think, no. So typically, we get them good leads, because of the publications we deal with are massive. [...] End of the day, let me give you two different types of clients you get. [...] Some people just want to be seen on [major online publication] so they can go home from the week and show their colleagues and their friends "look how cool I am, my company's on [major online publication]. Which is great. Others, on the other end, want their credibility. [...] So it's like "I saw you guys on [major online publication], I think that means you want to engage with their stakeholders. So it's variable, it's client to client, but generally I think it's, they want to be seen as credible and for them credibility means being seen on these sites.*

This construct's findings stand in contrast to other South African studies' findings that have shown the South African PR practice to play a distinctly important relationship-building role that facilitates inclusivity (see Section 2.3.3.1 and Section 2.3.3.2). Following this discussion, the qualitative information clarified the following points:

- Stakeholder relationships are often not an expected outcome for PR, especially not for PR agencies.
- Stakeholder relationships, and reporting on them, are seldom a formalised process.
- Stakeholder relationships are regarded as more important by in-house practitioners, where they set out to create opportunities for engagement and dialogue and measure it in terms of business outcomes. However, reporting on these relationships is still *ad hoc* and unstructured.

5.3.3.6 Practitioner Knowledge

For this construct, practitioner research capacity was investigated to determine to what extent practitioners are knowledgeable and comfortable applying different research methods. Practically this construct provides a baseline for research competence, which is required and brought into play when investigating practitioners' reporting in the following discussion, as well as measurement and evaluation activities in the next subsection of this chapter. From the information described up to this point, it is expected that respondents will have strong research skills as they are highly educated and experienced. The quantitative data on practitioner research capacity were reported as follows:

Table 5.16 Research Knowledge

Construct	#	Concept	% Strongly Disagree (1)	% Disagree (2)	% Neutral (3)	% Agree (4)	% Strongly Agree (5)	Mean
Practitioner Knowledge	23	Practitioner Research Capacity 1	1,9	1,9	17,5	35,9	42,7	4,16
	24	Practitioner Research Capacity 2	3,9	4,9	17,5	34,0	39,8	4,01

As was seen from the demographic descriptive statistics of respondents, a large portion of respondents were very highly qualified. This construct's responses reflect this, with the largest proportion of respondents indicating that they have a good understanding of different research methods such as surveys, focus groups, content analyses, and interviews. Cumulatively, 78.6% (n=81) respondents were in agreement with this statement. Nearly a fifth of respondents (17.5%, n=18) were neutral and cumulatively only 3.8% (n=4) were in disagreement.

However, when it comes to applying these research methods, agreement slightly declined. A total of 73.8% (n=76) indicated that they agreed or strongly agreed to feeling confident in applying research methods and again nearly a fifth of respondents at 17.5% (n=18) were neutral. Disagreement was slightly higher for this item, with 8.8% (n=9) of respondents disagreeing or strongly disagreeing.

Interestingly, agency-bound participants indicated in interviews that they feel that research lies outside of the scope of PR, explaining that PR should "stick to their own trade", and that clients would often rather make use of specialist research agencies to conduct stakeholder research. The majority of agency-bound practitioners also indicated that they had little to no research capacity in their teams, other than themselves.

In Section 3.2.1 it was cited that Swenson *et al.* (2019) found strong evaluation expertise throughout every team, at every level in excellent PR departments and that the leaders of these departments worked consciously to hone measurement and evaluation skills in their teams. This mark of excellence, as found by Swenson *et al.*, appears to be missing among this study's participants.

From interviews it further came forth that in-house practitioners all considered their own research skills as highly valuable, but they often also had more support in this. One participant specified that while they are currently part of a large organisation with a Research and Development department that can supply any research required, previous experience had forced them to learn all the required research skills they needed. This participant explained these ideas:

Participant: *So we work with as one with our insight team. They put together insights. So it could be reports, it could be any analyses, and they kind of dissect and see, what does it mean for the profession? [...] But the interesting part of it is it as much as there's a transformation, there's a PR link to it.*

Yeah, we've got quite a strong research and development team. Right? So it's across the entire organisation. [...] So whenever you put together a strategy you've got access to them, saying "I'm looking for statistics on XYZ" and they'll say "it's available", or "in fact we're still conducting the research, you'll get it at this time". But there's a portal, so whenever you need, there's a portal that you could go to look for the information, if you can't find anything they are accessible.

I think my, me being in the industry for longer, I literally had to learn how to source some of the information as well. And I've worked for a professional body. So you know, when you work for professional bodies, you tend to have limited resources. You're also given a task to do something else. So even doing research is, you know, starting with desk research, and if you needed to go further and do surveys or focus groups, it was done by the team you couldn't even outsource the task, there was no funds. So you kind of needed to do everything internally.

Another in-house practitioner is currently completing an Honours degree and applies their research skills to their work as PR practitioner to inform his/her PR activities. This participant was the only one, across all interview participants who were able to articulate conducting any form of empirical research themselves to inform their PR activities:

Participant: *We've got a journal, we've been wanting to get rid of the bloody thing because it's a lot of work, it costs a lot of money, but we did a survey we've got a lot of retired people who still love reading it. So we still have to do you know, send it out. [...]*

Following this discussion, the following points were seen:

- It appears from the quantitative result, most respondents agreed that they have strong research skills, both in the understanding of research methods and the application thereof – however, slightly fewer were confident in applying them.
- A strong disjoint arose from interviews, where very few practitioners indicated any research skills on their teams (though they themselves mostly had the educational foundation for applying research). The fact that most participants indicated that they did not conduct research as part of their PR function or activities, may explain why they do not actively recruit for research skills.
- Agency-bound PR practitioners disregarded empirical research easily, while in-house PR practitioners underscored its value and were seen to use it to inform their strategic planning and operations.

Overall then, it is seen that the construct of practitioner knowledge poses a relatively strong disjoint in quantitative and qualitative perspectives. However, from interviews it emerged that in-house PR practitioners were much more inclined towards applying their research capacity to inform their activities. This aspect is considered in the following discussion inquiring into how PR practitioners report to their clients and management on the PR function.

5.3.3.7 Reporting on Insights

The third specific research question specifies the inquiry into how PR practitioners in South Africa report on their PR efforts. The construct for reporting on insights entailed respondents' proclivity and ability to generate actionable business suggestions using PR-driven data to inform organisational decision-making, and translating the impact of PR activities to their organisations/clients. This forms part of both the functional (Section 2.3) and relational (Section 2.4) paradigms, where PR was theoretically discussed as a strategic practice that can report on the value it contributes to an organisation and how this value is created through strategic communication management and stakeholder relationships as a result thereof. However, it also ties to PR's reflective function in the cybernetic feedback loop (see Section 2.2) where information gathered from the environment is fed back into the organisational strategy. In this paradigm it was also seen that this reflective role of the PR function is a major contributor to communication excellence (Tench & Zerfass, 2018; Verčič & Zerfass, 2018). Levine (2018) stated that "focusing on the why behind the brief" enables evaluation in the functional paradigm (see Section 3.3.2) and this allows for drawing insights from evaluation.

From the quantitative survey, this construct's data were reported as follows:

Table 5.17 Reporting on Insights

Construct	#	Concept	% Strongly Disagree (1)	% Disagree (2)	% Neutral (3)	% Agree (4)	% Strongly Agree (5)	Mean
Reporting on Insights	31	Reporting on Insights	4,9	3,9	26,2	35,9	29,1	3,81
	32	Generating Suggestions	1,9	7,8	24,3	33,0	33,0	3,87
	33	Translating Impact	1,0	5,8	15,5	35,0	42,7	4,13

From Table 5.17 it is seen that the largest group of participants, cumulatively 65% (n=67), agreed or strongly agreed to reporting on insights to their organisations/clients using PR-driven data. However, a large portion of respondents was neutral on this item, amounting to 26.2% (n=27) while cumulatively 8.8% (n=9) were in disagreement. When it comes to their insights aiding the organisation/client in making better business decisions by generating suggestions, 66% (n=68) of respondents both strongly agreed and agreed. A large portion of respondents was again neutral (24.3%, n=25) while the smallest portion of respondents (9.7%, n=10) were in disagreement. In translating the impact of PR to organisations/clients, respondents were in high agreement with the statement, as cumulatively 77.7% (n=80) strongly agreed or agreed that they conduct this activity; very little disagreement was seen with this item, with a cumulative of 6.8% (n=7) of respondents in disagreement with the statement.

For this construct then, it appears from the quantitative data that respondents overall regard their reporting to contribute to proving PR's value in organisations and is guiding businesses to better understand and navigate their environment. When read in the context of all the PR practice-related constructs discussed up to this point, this data fit coherently into a pattern. Up to this point, quantitative data have shown that PR practitioners do, indeed, regard their PR practices across the board to be of high strategic nature. However, these notions were then often contrasted in qualitative discussions and a degree of misinterpretation of strategic constructs was seen in many instances. Plainly, PR practitioners appeared to regard their activities, alignment, and reporting to be of strategic nature when it is actually rather limited in its strategic value.

This theme of reporting on insights was again explored in qualitative interviews to gain a better understanding from practitioners of its practical manifestation. From the interviews it generally came forth that the nature of PR practice determines the nature and extent of reporting on insights. However, this was often a frustrating process for some practitioners. One practitioner mentioned their

frustration with reference to articulating the value of PR in the reporting process at multiple points in the conversation:

Participant: ...and a lot of these [large PR] agencies wanted to track obviously the brands [with a social listening tool], you know, to try and find value. And it didn't make sense to me, I'm like, what, you know, how would this mention, you know, what value are you putting on this mention in this publication? You must get into a bit more...

...there's a need in the market for proper PR. And proper PR means I'm not gonna write a press release and send it to a mailing list of 200 people and hold thumbs it gets published. [...] traditional PR agencies will push for as much free value as possible, like. "you have to publish this, this is the best piece of content ever", meanwhile, it isn't.

For us it's, we report it, and I'm glad we had this conversation... you know, how do you report? You know? What do people want? And like I said often I don't think clients do know what they want. They're kind of sold on this journey of bells and whistles and then it's not delivered on and then the relationship breaks down.

Another participant explained their frustration in delivering a valuable reporting component as a part of their agency service:

Participant: I think I have a good reputation in the industry. Certainly, most of my work is word of mouth. So I get clients. But then the ongoing value proposition... I won't say I lose clients, but I want to sort of, it's almost like you want the service to be aligned. There's the service delivery, there's the strategic delivery, there's the physical delivery, but then there's the reporting delivery and that's where I feel like I'm... that's where it's falling down for me.

It was prevalent among interview participants that the reporting component causes discomfort and that practitioners are aware that this is a sphere where there is room for improvement:

Participant: And I think this is where we've been poor in articulating the value of it [PR]. It's to focus on the value of leadership presence, of leadership commentary, of leadership visibility, and I... I... yeah, I need to explore that more... But I think if we better articulate it and we can attach more mechanisms around how you measure that, maybe that's a value statement in itself. Maybe that something is that the perception or survey on leadership, how would you rate the leadership of the business based on their presence in the market, as opposed to just "well, we were seen in this article or that article or on this TV programme or this radio station". We need to change the questions we ask, rather than just assume that these are the questions that they [clients] want answered.

Participant: *In my last few years I've worked with startup businesses and I've seen what visibility does. [...] I do a lot of work in tech with startups and they see the B2B influence. They see doors that are opening in terms of connections and things like that. You know, I know. I just... I just... I just... I just want to get to a place where I can say "Okay, this is what it's done for you" instead of working on that sort of resonant gut feel all the time.*

However, a strong disjoint was seen among participants in this regard. Multiple agency-bound participants comfortably described how they provide data and metrics, but that their reporting does not focus on translating the impact of PR to business outcomes:

Participant: *I don't do any fancy pie charts and graphs. And whatever it is. They [clients] don't actually want that. They just want to physically see the coverage that they've got. And it's basically, the magazine for example Fair Lady, July issue, on page whatever, and then the AVE figure that they [media monitoring software] give me, I include that in my report...*

Participant: *...and then, you know, people are like "what's my value? What's my ROI?" and we're like, well we don't believe in AVE and stuff, like, there's your reads, there's your impressions, we get it from the publishers, we can track them through these reports. Like, there are your numbers...*

Participant: *I have a basic one. I would like to have a more comprehensive one that looks at everything. Looks at the analytics. I'm working with a client on their website, so they've started, they used MailChimp, they use Google Adverts, they use Facebook, they use PR – media. Right. Media, just standard articles. So Google Analytics tells you where the traffic to their website, and a lot of the pushes are directly to clicks onto the website. So we actually saw that they had two articles on one of the career pages and yeah, we could see where the traffic was coming from. Facebook, obviously, and we could see... couple of the articles gave us a spike in clicks based on the timeline of when that articles appeared.*

However, in some cases this was still regarded as a strategic activity, as the reporting would tie output metrics back to PR goals for agency practitioners, as one respondent explained:

Participant: *Yeah, state just what the goals were... and then just going back to what we're doing... you know... how many clicks you have, page opening clicks... I think the value of being in a B2B business is that you know who your clients are, and with B2C there's less of a personal touch, if I can say that.*

Participant: *I don't know if there should be a standard, or if there is a certain industry standard on how these reports should be done. But with regards to us, we do very basic metrics and at the end of the day we want to show value in generated business and leads and exposure for clients. And I think once we give them that, I don't even think they read the reports.*

It is important to note at this point that when the PR function's goals are not strongly tied to business goals through primary strategic alignment but rather focused on PR outputs, then reporting on these goals would naturally be limited to reporting on those PR outputs. Swenson *et al.* (2019) confirmed this link, where they found that providing insights to executives is a key focus area for excellent PR leaders (see Section 2.2.2). If strong secondary alignment took place, practitioners will be able to generate reports that indicate success on all technical fronts but would ultimately fail in proving the theoretical value of the PR function if the impact of activities is not translated to business goals or outcomes.

Many of these interview participants cited that they could provide clients with the metrics for PR campaigns, but that the clients were ultimately responsible for translating its impact on their organisation and determine what it's worth to them, as one respondent clarified:

Participant: *I'll give that [published content] to you. That's completely transparent. You can't lie about that. If you want to know the value of it, basically, what is the value to you?*

This theme had multiple references across interviews to reporting according to the expectations or needs of clients/management. It was quoted earlier in this discussion that one respondent mentioned "They [clients] don't actually want that. They just want to physically see the coverage that they've got.". Reporting was often seen to ultimately be determined by what the client or management wants, as another respondent explained:

Participant: *So... So... the client tells me what they want to achieve through it, and then we monitor that... have we reached that? Have you achieved that? [client description and campaign description] so I sit with them [after the campaign] and say "Have we achieved that?".*

However, this wasn't as clear-cut for all participants, as one explained the difficulties of knowing what the expectations are for reporting in some instances:

Participant: *Because I think it is harder in corporate to actually get a sense about what the expectation was other than yards of coverage.*

More participants alluded to this point and so client expectations in terms of reporting appeared to play a major role in reporting on insights, where clients and even management (in the case of in-

house practitioners) did not often expect PR practitioners to report on a deeper level of insight than pure metrics. With this in mind, it was seen that multiple practitioners often focus on getting the reports right for clients/management to enable clear and understandable reporting on the required metrics:

Participant: *Generally, our clients just want to know, how many people went onto [major online publication] this month, which is quite readily available, and they wanna know, from the publisher, clickthroughs, impressions, and then what we do for the clients as well we attach like UTM codes that goes through to their sites, so often we ask them to give us access to their Google Analytics. So it's a very basic, two/three page, boom boom boom, you know, there it is, we don't try and complicate it.*

Participant: *I've always said you must stop speaking too high for everyone to, you know, we need to speak in layman's terms. So I don't always understand all the bloody words out there. So I try, and if I can understand it – again, I use that as a measurement - then everyone can understand. So what we do is when I speak, you know about click-through rates and stuff to an old person, you kind of just... I don't know, you use icons when you presented to them. I know it sounds silly, but... and you just give them, basically the results of it, like, what does it mean? And you know, so you kind of layman's terms and use pictures. [...] And we use icons with it, I kid you not, it works like a charm. So we use icons. And we will say in a small sentence, for instance, I'm trying to think of an actual example here quickly now... But for instance, with LinkedIn, we will literally say that, okay, that there's been this much organic, you know, organic reach, which means that the post, you know, just a small sentence. Just to explain in layman's terms, what it means.*

The last quoted respondent's description leads into the second concept of reporting on insights, which is translating the impact of PR to clients and management.

Here, two tangents emerged from the discussions on translating the impact of PR when reporting on the PR function – the first was explaining the metrics that made up these reports to management and clients. Multiple participants confirmed that it was mostly not necessary to explain to management and clients the basic output metrics when reporting on it, as follows:

Participant: *Uhm, no. Not the quantitative things. Not at all. And they... No. Not really, hey.*

Participant: *Yeah no they're quite knowledgeable. I deal with lots of managers and they know the game.*

Participant: *They seem to know what the value is, you know. So when I talk we kind of come to some kind of arranged knowledge.*

In these discussions it was again seen that client/management needs played a major part in the reporting practitioners deliver. One respondent explained that:

Participant: *I'm very fortunate in that 90% of the clients that I deal with are very happy with a very simple, no frills, no fuss, form of reporting. So it's literally the online link, and the AVE. So we kind of break it up into the different categories, print, broadcast, and online, and they can see the coverage, I track the coverages they get every month, and that's it.*

The second tangent that emerged related to the relationships between clients and PR agencies, which was discussed by both agency-bound practitioners and in-house practitioners. The influence of expectation management was highlighted from both sides when it comes to PR deliverables (and thus reporting thereon). From an agency side, some participants explained:

Participant: *I mean from clients, I, sometimes clients expect too much, you know. "Listen, Agency X, I want you to fulfil one of these PR functions for me. And I want to be featured here and on this television interview, and I want to be at this event, but I've got R20 000." You know. And then often that PR agency will take it, because they're like "we'll do our best". I mean, I suppose from both sides they don't really [meet expectations]. It's a tricky solve. And I think it's a tricky relationship. I've seen brands and agencies blow up very ugly. You know. Because KPIs weren't met. The reason I think KPIs weren't met is because people overpromise.*

I know a lot of friends that work in agencies and like the pressure's on them, because the client wants to see, the director wants a file with the bottom line value, otherwise they cut that spend. But it's tricky and I think maybe in this day in age there should be better, you know, type of measuring standards, maybe other PR companies aren't giving the exposure that they've promised clients, which is why they inflate these numbers. So it's tricky, I mean I'm not going to sit here and bash the system and say the model's broken. Because I know the pressures that come with it, you know. I'm not sure how other agencies show that measurement...

From an in-house practitioner point of view, the onus of the deliverables and ultimate reporting thereon was also emphasised. One participant articulated this thought as follows:

Participant: *And I think this it goes down to what you kind of decide is the deliverable is for the PR agency. I think it's kind of unfair for us practitioners to say, especially as in corporate, it's kind of unfair to say that the PR agency is not delivering, or is not giving us a certain aspect of an analysis. If we are upfront of what we expect from the PR agency and what deliverables, and actually put those measures in place, you will not get what you're looking for. You will always get frustrated, in fact.*

This position could be linked to the construct of strategic access, where unarticulated business outcomes and expectations, and limited strategic access, render practitioners incapable of producing these suggestions and insights (Section 5.3.3.3). It also ties into Zerfass *et al.*'s (2018) global finding that PR agencies were the second least likely group to report on insights (see Section 3.3.5). As it was discussed previously, agency-bound practitioners that are only granted access to strategic information as it pertains to them and not as it pertains to the whole of the organisation cannot comment on, or prove an impact on, the business strategy. It could be expected that this combination – limited strategic access, unarticulated business goals and expected outcomes, and low reporting on insights – forces practitioners into more technical roles within organisations and as agencies because they are simply unable to fully fulfil a strategic role.

This assumption may be explained in the different views expressed by in-house practitioners. In-house practitioners were divided into two camps, where one indicated that they easily report on insights because their strategy is so clear and aligned, with little confusion over what the business outcomes should be and what management expects. However, this still also contained an element of explaining the relevance of the metrics used. The participant explained that:

Participant: *So what I've done is to make sure that we put different elements into it, things like your share of voice, and you explain to them what you mean by share of voice. When you talk about sentiments, when you talk about leading back traffic into your website, you've got data that tells you that you've put out such a piece, people went back into your website, because they wanted more information. Those are the items that you could say, and say out of this, what's the conversion rate? Especially when there's something linked into growth, you could bring the conversion rate, say out of this, the growth team, whoever is involved from the sales point of view, they had two leads and immediately, you can equate it. And if you have to calculate the return of investment, you say "I only spent so much and you've got a lead, and two of those clients, they're giving you so much business." Those are the numbers they want to see in a report.*

In contrast, another in-house practitioner indicated that it is harder to report because the outcomes expected by management are hard to measure. This answer ties into their organisation's less formalised strategic approach, where they have a clear idea of the organisation's vision but no guiding overall strategy to align with. They explained that number-based metrics are falling short:

Participant: *...because we put in all the work, and we have, you know, we can show you the numbers. And we can measure that. But at the end of the day it doesn't mean anything to the board, or the guys, you know, the rest of the team. They want to see results. "Okay, so you've got all this engagement online. But are we making money out of sponsorship? Are we getting more people at our events? That's what they want. Which is not a formal, you know, like measurement. Our measurement is what you can actually see. The results you can see. Which is a bit frustrating for us sometimes...*

From these discussions, the following major points arose with regards to reporting on insights:

- As for many other constructs, quantitative data showed strong indications of a theoretically ideal practice for reporting on insights, with very strong indications of reporting on insights, generating suggestions, and especially for translating the impact of PR, yet qualitative information from interviews contrasted this view.
- It appears that PR practitioners regard their reporting to be sufficient, yet it is mostly based on output-metrics. In this, strategic alignment is an important process, but the nature of the PR function in practice and at what strategic level it truly functions will naturally prescribe the reporting that follows. In this case, where the nature of the PR function is mostly technical, the reporting corresponded. Where the PR function was more strategic, the reporting was easily tied back to business outcomes and there was little confusion over how and what to report on.
- Translating the impact of PR resulted in 'explaining metrics to management/clients' during qualitative conversations. Truly translating the value of the PR function and how it helped organisations to reach their goals were mostly neglected in conversations.
- There were many mixed perspectives, as some participants indicated to some extent that their reporting could improve, or is frustrating due to unclear expectations, while others indicated that their clients are completely satisfied with the level of reporting they provided and thus they indicated no need for expanding their reporting.

The theme of reporting on insights leads the discussion into the last subsection of the South African PR landscape. While this subsection of South African PR practice largely described the conditions

and practices of PR, it provided interpretative context for the subsection to follow: South African PR measurement and evaluation. Six constructs are grouped into this subsection that will serve to help answer the third specific research question and in this discussion the descriptive statistics described up to this point will be used to understand and possibly explain the measurement and evaluation practices found among respondents and participants in this study. Ultimately, this subsection can provide a gauge of the current measurement and evaluation practices and to what extent it is already standardised and aligned with the theoretical ideal for PR measurement and evaluation.

5.3.4 South African measurement and evaluation practices

This subsection further builds on the descriptive statistics reported in Section 5.2 and sets out the constructs and concepts pertaining to South African PR practitioners' measurement and evaluation that were quantitatively measured as continuous variables. The qualitative information gathered from interviews is used throughout this subsection to explain and provide context for this quantitative data. Table 5.18 below provides an overview of the descriptive statistics reported in this subsection:

Table 5.18 Descriptive statistics of PR measurement and evaluation

Construct	#	Concept	% Strongly Disagree (1)	% Disagree (2)	% Neutral (3)	% Agree (4)	% Strongly Agree (5)	Mean
Barcelona Principles	12	Formal process	5,8	11,7	22,3	34,0	26,2	3,63
	13	Awareness	29,1	14,6	18,4	12,6	25,2	2,90
	14	Implementation	36,9	14,6	28,2	10,7	9,7	2,42
Challenges	25	Financial	1,9	10,7	29,1	17,5	40,8	3,84
	26	Time	5,8	15,5	30,1	25,2	23,3	3,45
	27	Lack of research knowledge/expertise	21,4	18,4	29,1	21,4	9,7	2,80
	28	Uncertainty of PR value	26,2	22,3	22,3	19,4	9,7	2,64
	29	Lack of understanding/interest	11,7	17,5	32,0	25,2	13,6	3,12
	30	Lack of standardisation	8,7	16,5	21,4	32,0	21,4	3,41
Evaluation Types	34	Formative Evaluation 1	1,9	4,9	23,3	37,9	32,0	3,93
	35	Formative Evaluation 2	-	7,8	20,4	44,7	27,2	3,91
	36	Process Evaluation 1	1,0	6,8	21,4	39,8	31,1	3,93
	37	Process Evaluation 2	-	3,9	16,5	46,6	33,0	4,09
	38	Summative Evaluation 1	-	1,0	16,5	40,8	41,7	4,23
	39	Summative Evaluation 2	1,0	2,9	28,2	38,8	29,1	3,92
	40	Quantitative Research	7,8	23,3	26,2	23,3	19,4	3,23
	41	Qualitative Research	13,6	23,3	27,2	22,3	13,6	2,99
Measurement Maturity	42	Output Level	2,9	5,8	13,6	36,9	40,8	3,25
	43	Outtake Level	13,6	12,6	29,1	32,0	12,6	3,17
	44	Outcome Level	8,7	17,5	27,2	33,0	13,6	4,07
Social Media Measurement	45	Social Media	2,9	5,8	22,3	32,0	36,9	3,94
AVEs	46	AVEs	18,4	13,6	18,4	24,3	25,2	3,24
	47	Multipliers	36,9	18,4	19,4	12,6	12,6	2,46

From Table 5.18 it can be seen that the mean scores for constructs and concepts relating to PR measurement and evaluation were, on average, higher than a mean score of 3 – which indicates that most respondents leaned towards agreeing with the statements posed. As a high-level overview, this would indicate PR measurement and evaluation which is more aligned with the theoretical principles for PR measurement and evaluation as were described throughout Chapter 3.

As was seen throughout Chapter 3, PR measurement and evaluation and the value of PR cannot be separated from one another, with the one inherently creating and promoting the other. Proving the value of the PR function is the ultimate goal of PR measurement and evaluation, and reliable and rigorous PR measurement and evaluation enhances the value of the PR function as it promotes and enables PR's cybernetic reflective role. The mean scores depicted in Table 5.18 for the constructs relating to PR measurement and evaluation creates an image of measurement and evaluation practices that are to a larger extent aligned with theoretical ideals. However, interview participants from the qualitative phase of this study were a bit more sceptical about the link between measurement and evaluation and the value of PR. One participant noted:

Participant: *Most people perceive PR to be, specifically for the bigger agencies, just huge, huge retainers for very little delivery. I mean I don't charge huge retainers. So I'm comfortable in the space that I'm charging and giving fair value. And then when it comes to the conversation around, you know, fees and increases and "we delivered this, so how have you perceived that value?" and "this is what the metrics say", so that poses value.*

This interview extract highlights concern regarding the value of PR – even the deliverables of the PR function; it also relates the concept of PR value to the monetary cost of PR and the way in which deliverables are measured – metrics. In order to create a better foundational understanding of PR measurement and evaluation and how it is currently executed and perceived with the ultimate goal of standardisation, this subsection will detail the results and discussions for each construct investigated. These discussions will start with the Barcelona Principles as measured construct to provide a benchmark of where standardised PR measurement and evaluation currently lives in the South African PR practice.

5.3.4.1 Barcelona Principles

Inquiring into South African PR practitioners' implementation of the Barcelona Principles, this construct first measured the extent to which measurement and evaluation is a formal process for respondents, then measured respondents' awareness and implementation of the Barcelona Principles, respectively. The Barcelona Principles currently represents a globally accepted

framework for the global standardisation of PR measurement and evaluation set forth by AMEC (see Section 3.6). It first prescribes a degree of formalisation for PR measurement and evaluation. In order to be able to implement these principles, however, it is necessary that practitioners must first be aware of them. These theoretical points of formalisation, awareness, and implementation were captured in the 10th theoretical statement:

Theoretical statement 10: *In order to advance the field of standardised PR measurement and evaluation, PR practitioners must:*

- *Have a formal evaluation process in place.*
- *Be aware of the Barcelona Principles and its prescripts.*
- *Implement the Barcelona Principles in practice according to its prescripts.*

This construct measured the concepts of formal measurement and evaluation, awareness of the Barcelona Principles, and implementation of the Barcelona Principles to gauge to what extent standardisation could be expected among participants. The quantitative survey data were reported as follows:

Table 5.19 Barcelona Principles

Construct	#	Concept	% Strongly Disagree (1)	% Disagree (2)	% Neutral (3)	% Agree (4)	% Strongly Agree (5)	Mean
Barcelona Principles	12	Formal process	5,8	11,7	22,3	34,0	26,2	3,63
	13	Awareness	29,1	14,6	18,4	12,6	25,2	2,90
	14	Implementation	36,9	14,6	28,2	10,7	9,7	2,42

From the quantitative results in Table 5.19 it was seen that measurement and evaluation was conducted as a formal process for the majority of respondents, with a cumulative of 60.2% (n=62) indicating a level of agreement for this item. However, there was also considerable disagreement among respondents, amounting to a cumulative of 17.5% (n=18) of respondents who indicated that they have little/no formal measurement and evaluation process.

These results may hold a connection to qualitative discussions that came forth on the topic of secondary strategic alignment (Section 5.3.3.4), where interviewees explained that they rely on their experience and industry knowledge to guide them on instinct alone for strategic alignment. It could be the case that practitioners who do not have a formal measurement and evaluation process could also be using this ‘instinct’ to determine success. This was seen again for this construct’s discussions, as one participant explained:

Participant: *Yeah, and I mean, look at the end of the day, even though we don't have formal evaluation lines in there, we are checking, it's like a recipe you are tasting constantly while you're cooking. So we are checking it but to be honest with you. We're also just winging it as we go.*

Of the two participants that specifically indicated that they have no formal process for measurement and evaluation, one of these said that it is very frustrating because this also implied that they had no way of measuring their own success for personal satisfaction and had no comparative benchmarks:

Participant: *Yeah we also don't really, very strangely don't have KPIs. We don't have KPIs at the [organisation], we wrote some out just as an internal, like little guidance or something. That's what I find a very difficult thing.*

Because for us on a personal level of evaluation, there is nothing that we can measure ourselves to, like, have we had, like, you put in so much work, yet there's no actual KPI to which you can measure yourself. So I don't know if you've ever done this. But when you write down your list for the day, and by the end of the day, and you've done all the bullets on your 'To Do' list, you feel successful, motivated and you like I've had a productive day. Whereas, when you couldn't get to everything. And every, you know, you kind of feel a little bit demotivated and you actually second guess yourself in a sense of have I actually worked today, like I've been busy the whole day, but nothing has been completed.

Multiple participants indicated formalisation in their measurement and evaluation to some extent. This was mostly indicated in the form of a report template (as were seen in Section 5.3.3.7, these reports more often concerned output-level metrics which is to a larger extent standard across different campaigns). However, during interviews participants highlighted some challenges they encountered concerning this topic. Of these, participants cited that they are dependent on client feedback for the information they need, as one participant described:

Participant: *I will ask clients "Listen, how many leads did you get from this campaign?" and then later how many of them were like, qualified leads, good leads, and then I obviously ask them how many of them did they convert. Obviously it's up to them to share that information.*

It appeared that the variety found in PR activities across clients and campaigns dictated by agency client needs also proved to be challenging in implementing a formalised measurement and evaluation process, as one participant plainly stated:

Participant: *Because honestly, each client's needs are completely different to one another.*

Another hindrance to formalised measurement and evaluation that came forth from interviews was that, aside from clients simply not expressing a need for in-depth reporting (as discussed in Section 5.3.3.7), is a general lack of industry-consensus, as one participant described:

Participant: *Look, for us again, it's... it hasn't, we haven't hit a brick wall yet with the clients asking for that type of granular measurement down to a tee. We do very basic reporting on our campaigns and measurement. Industry-wide, I'm not sure, you know, I know a lot of people in working a lot of agencies and no one really seems to have an answer with regards to how they do it. And I think everyone does it differently, you know.*

From respondents that implemented formal measurement and evaluation processes, these processes were mostly described as a periodical (mostly monthly) compilation of output metrics. Multiple agency-bound respondents cited media monitoring tools to aid them in this process, which readily supply output-level metrics. However, participants expressed a recognised need for improvement in this area:

Participant: *I'm going to involve someone now to help me gather the metrics and do surveys and be more active around... Yeah. We're gonna formalise it.*

In the case where interviewees explained a formal measurement and evaluation process, the PR function's strategic alignment played a key role. It was also seen that determining concrete deliverables is an important factor in this process:

Participant: *And we started putting targets – we said, out of a thought leadership piece, we need to get five interview requests. So you're kind of starting to put numbers into it so that you can say "this is our success rate".*

It is thus seen that, in terms of formalised measurement and evaluation, practices range between no formalisation which causes frustration, limited formalisation which is based on output metrics yet causes challenges in terms of getting client feedback, accommodating variety in PR efforts, and little industry-agreement, and formalisation where PR activities are tied to concrete deliverables. In the light of this variety of views that came forth on formalising measurement and evaluation, participants were asked to what degree they believed standardisation in PR measurement and evaluation is possible or a priority. Participants tentatively engaged with this topic, and it came forth that most of them believed standardisation to be possible but not easily attainable. One participant explained that:

Interviewer: *Do you think the industry needs standardisation in how we report on PR?*

Participant: *I think it would be nice because then we're all comparing apples and apples. It's not strawberries and kiwis. I think it would benefit everybody if we were all speaking the same language and talking the same figures. [...] Sjo, it's gonna be one hell of a thing to try to do. But it would be sort of an ideal situation at the end of the day. I don't know how somebody would get that right, though.*

Another participant stated that:

Participant: *Yes... But there needs to be buy-in from clients and agencies and PR professionals... and someone needs to standardise it and with any standardisation there are, people are not going to be happy. [...] so the answer is yes, but with lots of... I don't know... objections.*

On the topic of standardisation, another participant affirmed the need but also their reservations:

Participant: *I don't think the PR industry has rolled out something... You know, Google Analytics is universal, SocialBakers, that tool is available, Hootsuite, uhm... PR needs to develop its own metric. And I don't know who does that. I don't know if there's another big player... Who's doing that.*

However, not all participants shared this view. One participant described a more foundational issue with regards to standardisation, citing that PR's inability to express its value as a definition statement will prevent standardisation:

Participant: *We can't even define exactly the definition [of PR], no one can. So how are you going to standardize it? How are you going to give concrete goals, visions characteristics? How are you even going to guide your own practitioners?*

Given this uncertainty and disagreement in terms of formalisation and standardisation of PR measurement and evaluation, it comes as no surprise then that the quantitative data on awareness of the Barcelona Principles scored relatively low - the responses on this concept were tilted in the direction of unfamiliarity with the Barcelona Principles, as a cumulative 43.7% (45) respondents indicated their unfamiliarity and a cumulative 37.9% (n=39) respondents indicated familiarity.

Upon deeper discussion of this topic in interviews, it became apparent that most practitioners were willing to admit that they are aware of the principles, but that this was a very superficial awareness as they researched the principles upon completing or while completing the study's quantitative survey. One interviewee had also followed up with the researcher after participating in an interview, stating that they had conducted a deeper investigation into the Barcelona Principles after the

interview had taken place and were surprised to find that their practice aligns strongly with the principles, regardless of their previous unawareness. During interviews, participants admitted:

Participant: *Not really, I've read a little about, it in your research I read a little bit about that, but...*

Participant: *I saw, uh, when you reached out to me I quickly Googled it and briefed over it but I'm not 100% clued up with it, no.*

One interviewee was very familiar with the Barcelona Principles and has worked with the principles for years, trying to implement it in practice, while another was “quite familiar” with the principles but did not implement it. When it comes to implementing the Barcelona Principles, the majority of respondents indicated that they do not implement the principles, with a cumulative of 51.5% (n=53) indicating that they disagreed or strongly disagreed with their implementation of it. The next largest group was neutral on their implementation of the principles, at 28.2% (n=29) of respondents. A cumulative of 20.4% (n=21) of respondents showed agreement with their implementation of the principles. The fact that a large group of respondents was neutral on their implementation of the Barcelona Principles is curious, but may be tied to the tentative awareness – it could be that if respondents did not know about the principles, they could not know with certainty whether they implemented the principles. In interviews, this was almost confirmed as one participant stated:

Participant: *So almost intuitively I'm doing... what the metrics should be saying... what's the biggest business goals and were leveraging PR to achieve that.*

The quantitative findings of implementation of the Barcelona Principles were reflected in the qualitative phase, where the majority of participants did not implement the Barcelona Principles due to their unfamiliarity with it, discussed above. Of the participants who were familiar with the Barcelona Principles, one participant stated that the Barcelona Principles are “good in principle, but difficult – nearly impossible – to implement”.

Another, however, has been implementing the principles for many years, though admittedly not all of the principles. Since its first publication, this participant had incorporated the principles into their measurement and evaluation processes, selecting the ones that had fit and were most relevant to their strategy and measurement and evaluation process. This in-house participant was able to elaborate on the impact of implementing the Barcelona Principles, an impact that flowed through to their selection of PR agencies, saying that:

Participant: *When a PR agency says they report integrated with the principles, I can see they are not just doing PR for the sake of doing PR. They're actually thinking beyond PR.*

In implementing the Barcelona Principles, it also posted significant benefits to the participants implementing the principles:

Participant: *It allowed the team to bring in data – something that the board would say ‘I never thought of it that way’. Intelligent data makes people think. Don’t create a policy – create it to be a guide.*

When you have intelligent data, you are able to tweak because you have intelligent data. You are able say during this month, ‘During this month we identified that his changed the narrative, and how we changed it is because we saw that during the month of December there’s a lot of people that want to save, but do they know how to save? So during the month of December we need 20 financial planners to come and assist us. So you’re already talking the language that they [management] want.

However, it emerged that this participant did not think the Barcelona Principles to be suited to any organisation, but that only some aspects could be linked. An important takeaway is that they did manage to implement the Barcelona Principles to a larger extent, and tie their measurement and evaluation to business goals:

Participant: *So we had to look at Barcelona measures and ask what is it that will give us the measurement, based on the message or the keywords we’re using? And that’s where engagement comes in. So if we get people that come back to us and say X member is reported for misconduct, that’s where it was linked to impact – were we able to make an impact, did we take the matter forward? How far did the matter go? That’s what we had to look for.*

This discussion highlighted a few key points on South African PR practitioners’ stance in relation to standardised measurement and evaluation:

- Quantitatively, over 50% of respondents are unaware of the Barcelona Principles, and only 20% are implementing the Barcelona Principles to some extent.
- Formal measurement and evaluation processes are low, which may impact the adoption of standardised processes in this regard.
- There is a general tendency among practitioners to believe standardisation nearly impossible to achieve.
- Awareness of standardisation in the form of the Barcelona Principles is still very low among this study’s participants. Awareness of the principles occurred among practitioners who held a highly strategic view of PR in general.

- Where awareness of the Barcelona Principles was indicated, there is no full implementation – practitioners are either sceptical, or found the principles unsuitable to be implemented in its entirety.

Generally, it is thus seen that in terms of how PR practitioners measure and evaluate their PR efforts (as stated in the third specific research question) there is little standardisation in current practice among this study's population. The following discussion will explore this in detail, aiming to determine the challenges practitioners face in PR measurement and evaluation.

5.3.4.2 Challenges

The next construct inquired into the challenges respondents faced in measuring and evaluating their PR efforts. From literature, six main persistent global challenges were identified and used in this construct as financial restraints, time, lack of research knowledge/expertise, uncertainty over what constitutes the value of PR, lack of understanding or interest from management/clients, and lack of standardised terminology (see Section 3.2). Theoretically it was seen that these challenges did not stand in isolation to the rest of the PR environment, and that PR evaluation required rigorous research as was captured in the sixth theoretical statement:

Theoretical statement 6: *Practitioners consistently face financial, time, knowledge, value, interest/understanding, and standardisation as barriers to conducting measurement and evaluation. The wide range of measurement and evaluation practices required to prove value necessitates that the PR practitioner is able to conduct rigorous research:*

- *The PR practitioner must be educated/trained to conduct qualitative and quantitative research.*
- *The PR practitioner must be familiar with research best practice in order to produce reliable and valid research results across a broad spectrum of activities and platforms.*
- *Practitioner education/knowledge can help practitioners overcome the most common challenges.*

Inquiring specifically into the challenges faced by practitioners, these were quantitatively indicated as follows:

Table 5.20 Challenges to PR measurement and evaluation

Construct	#	Concept	% Strongly Disagree (1)	% Disagree (2)	% Neutral (3)	% Agree (4)	% Strongly Agree (5)	Mean
Challenges	25	Financial	1,9	10,7	29,1	17,5	40,8	3,84
	26	Time	5,8	15,5	30,1	25,2	23,3	3,45
	27	Lack of research knowledge/expertise	21,4	18,4	29,1	21,4	9,7	2,80
	28	Uncertainty of PR value	26,2	22,3	22,3	19,4	9,7	2,64
	29	Lack of understanding/interest	11,7	17,5	32,0	25,2	13,6	3,12
	30	Lack of standardisation	8,7	16,5	21,4	32,0	21,4	3,41

Building on the quantitative data in Table 5.20, Figure 5.3 visualises this construct’s cumulative quantitative responses:

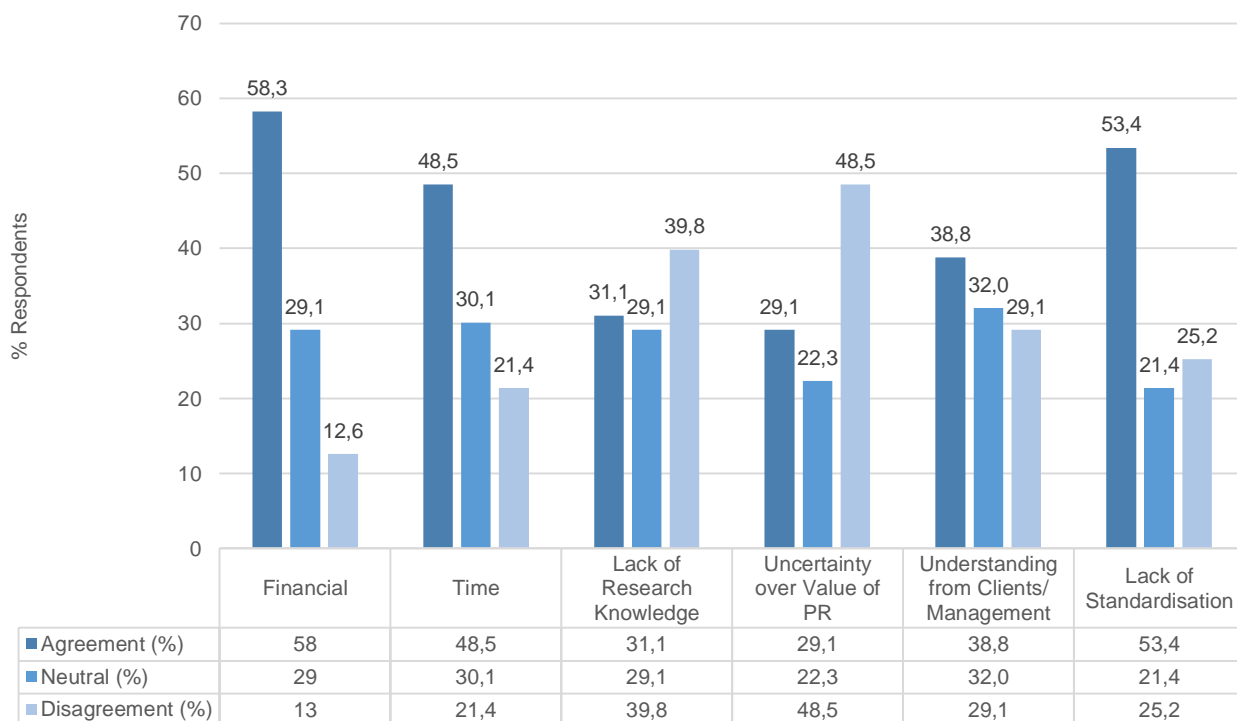


Figure 5.3 Challenges in PR measurement and evaluation

As seen in Table 5.20 and Figure 5.3, respondents indicated Financial Restraints as their biggest challenge in measurement and evaluation (58.3%, n=60). This was closely followed by Lack of Standardisation, to which cumulatively 53.4% (n=55) respondents agreed or strongly agreed. Time

to conduct measurement and evaluation followed as the third-most predominant challenge, with 48.5% (n=50) of respondents in agreement, and then a Lack of Understanding from Clients/Management was cited as the fourth largest challenge with 38.8% (n=40) agreement among respondents. The lowest challenges were seen to be Lack of Research Knowledge (31.1%, n=32) and Uncertainty over what constitutes the value of PR (29.1%, n=30).

When the challenges practitioners are facing in measurement and evaluation were discussed during interviews, multiple themes emerged most strongly which supported the survey responses. The challenges that were cited across interviews were recorded and tabulated as follows:

Table 5.21 Tabulated challenges to measurement and evaluation

Theoretical global challenges	Challenges cited by interview participants
Uncertainty over what constitutes the Value of PR	Not being able to quantify or define the value of PR Not sure what to measure Difficulty to manage client expectations when reporting on “fuzzy” outcomes
Financial	Financial cost of media monitoring software Economic climate depressing client spend
Time	Time/Manpower to undertake in-depth measurement and evaluation The role of the practitioner
Lack of Standardisation	Lack of standardised terminology No guarantee of publication for content Inconsistency in the metrics provided by different media monitoring tools
Lack of Understanding from Clients/Management	Lack of client expectations
Other	Educating teams on why meaningful analytics and data is needed No formal goals Difficulty to access required metrics over multiple platforms Competition from other business functions that report better

From Table 5.21 it is seen that most challenges that were mentioned in the qualitative interviews corresponded with the quantified concepts and this served to clarify, to some extent, the particular facets of each challenge that impacted practice. The majority of interview respondents described their measurement and evaluation activities as a secondary research process, utilising desk-research to gather data for reporting and no primary research was described for this activity.

However, other challenges also emerged to supplement quantitative challenges that are found globally. Where these challenges did overlap with theoretical global challenges, practitioners explained in what way each impacted their activities and it was seen that many of these challenges were ultimately interlinked or tied to one another in some way.

- ***Uncertainty over what constitutes the value of PR and Lack of understanding from clients/management***

The most prominently discussed challenge among participants in interviews was uncertainty over what constitutes the value of PR – which directly opposes the quantitative data where this challenge saw the lowest agreement and strongest disagreement. However, this was found in interviews to be very much interlinked with other challenges. As practitioners explained, the link between the lack of understanding from clients/management and the inability to quantify/define, and then prove, the value of PR came forth from several discussions:

Participant: *What I also have to constantly remind them [clients] of, is that PR is never guaranteed. And I think a lot of people don't get that at first. So it's like a constant, having to remind them that I can write an awesome press release about something fantastic which happened, and send it to ten different journalists, but there's no guarantee how many of them are actually going to read this. At the end of the day it's at the editor's discretion. Unless you're actually paying for the space, you have no control over that.*

Participant: *Because I work with a mixed bag of clients, [the business outcomes] is kind of different for each client. Sometimes it's very difficult to measure because it's not like you can say "as a result of PR my sales have increased this much". Sometimes it's just about creating awareness, getting in front of the consumer, blah blah blah blah blah. But on the other hand, I've had examples a few times, where a client that I worked with for many years – they were desperately trying to get into Clicks [store, with their beauty products] and it was a huge rigmaroll [...] and it was basically an ongoing struggle for them. And then one day, out of the blue, this person they have been hounding for months phones the MD of this company and says "I've just gone through 5 magazines that were on my desk and these products are in every single magazine, I wanna list all of them now.". So that was as a direct result of PR.*

It may thus be that practitioners do not necessarily view their own lack of understanding over what constitutes the value of PR to be a challenge, but rather that it is seldom identifiable in a mix of different variables that impacts PR activities.

- **Financial**

In terms of Financial challenge, particularly the cost of software and resources to conduct this activity is a challenge to practitioner. These tools are often inconsistent in the metrics they provide, which is challenging to practitioners. Multiple participants explained:

Participant: *With regards to our metrics – could we improve and maybe go deeper? Sure. But it costs money and normally someone has to do this for you, you have to pay an external company to track all these things for you.*

Participant: *It can be very costly to pay media monitoring company.*

Participant: *Because media monitoring is quite expensive if you use the bigger tools... per client its quite expensive...*

Participant: *Consistency with certain media monitoring houses. A very big frustration, one of my pet peeves where I could actually smash somebody's head against the wall is if a client phones me and say "I can't believe we're in the [publication] today", and I don't know about.*

Participant: *But it's [media monitoring software] something that every PR company must have, it's like, an essential, so you kind of have to pay the bucks in order to get the service because it would be physically impossible for me to try and track all my clients' coverage. So I would say cost is a big factor for me, and the, sort of delivery, from certain [media monitoring] companies.*

One practitioner that also cited a Financial challenge, linked this to the business impact where a depressed economic climate was seen to be the challenge, as clients are cutting down spend:

Participant: *[...] consensus is that people are cutting back on budget. And as a result, they are reluctant to sign up for retainers of like a year or longer. I'm finding a lot of clients that say "Okay, we'll just do a project now, and then go to another project in a few months' time". And, "Could we maybe just do a three months or six months' retainer?". So we, as PR practitioners, are having to kind of adjust and adapt [...] your offering, obviously it's dependent on each client and what they're looking to achieve... I'm constantly having to keep my pipeline filled and look for new business aaalll the time because at the end of the six months' retainer there's no guarantee that they're going to want to renew. And it could be financial, it could be for another reason, and it's definitely not as a result of not being happy with what they are getting because 9 out of 10 times, or actually 10 out of 10 times, they're extremely happy with the coverage that they've got. It's just a financial thing. So I think having to try and work around that is a challenge for everybody.*

- **Time**

One interviewee indicated that although they believed that they have the competence to undertake more sophisticated measurement and evaluation, time posed a challenge and that this also impacted the benefit they are able to gain from measurement and evaluation:

Participant: *You know, I'm a very experienced PR person, I know the game, I know that I have my strengths, but the admin and the backup and the... ja. I mean, it's just... I'm looking for someone to come and do this on a part-time basis.*

[Do you find that you are benefitting from your current measurement and evaluation?] No, because I'm not communicating it properly. So I've got to get it together. Its, it's just... I'm running. Yeah.

During interviews, participants mainly indicated that time is a constraint to measurement and evaluation because they seldom have chance to step back and properly evaluate their own work, owing to the need to first “get the work done” and execute on technical tasks because they typically function in very small teams. One participant emphasised this distinction between strategy and implementation, and the impact of the practitioner’s role on measurement and evaluation:

Participant: *You will see even in corporate, somebody who put a strategy might end up implementing. And you kinda need to move away from that. Someone who put a strategy can't be implementing. But somebody who put a strategy can be monitoring – because they could say guys, you're not doing what we were supposed to do because from a measurement point of view, we're not there. If you're putting strategy and implementing, you forget about sitting back and monitoring and say hang on. Are we really implementing what we really want out there? Are we getting the results that we want? You don't have the luxury to take stock of what is out there because you're busy doing stuff.*

Interview participants that did not feel that time was a challenge to their measurement and evaluation described their activities for measurement and evaluation as mostly output-level metrics.

- **Lack of standardisation**

In terms of the lack of standardisation, it emerged from interviews that this was particularly applicable to terminology and creating a shared understanding of different metrics, as one participant explained:

Participant: *If we can standardise those... and the word standardise for me puts it in a rule and it needs to stay that way... If we can say to people in terms of terminology, this is what we mean and how it can support your organisation, it might start opening up the narrative more in a positive way.*

One participant indicated that educating people in their organisation on why they need the statistics and data they request (which will allow them to gain insight and drill down deeper than just face-value data), is the biggest challenge. They are overcoming this challenge by continuously educating their colleagues and teams in both measurement and reporting on their efforts:

Participant: *It's more of an education. You tell them why we measure the Share of Voice, and what it actually means. So if it comes to sentiment, you tell them why. And I do it quite distinctively. You bring in your competitors and compare to say in terms of sentiment, this is where our competitors are because they were quite vocal about a specific topic. We are not vocal about this topic and so their share of voice is quite high. We are not visible in this space, this is why we need you as expert to be available for commentary. You need to be seen as leaders. [...] When you push it back and give them examples, it makes sense.*

Another participant explained how the type of metrics they are able to get for campaigns across different platforms are insufficient and that this posed a challenge to them:

Participant: *What I would like to know is, like, how I get... when I get on the client's website, if there was an article say on ITWeb or one of the news portals, would I see the click-through, is there a unique URL that would indicate the number of people that have actually seen the article. [...] a lot of clients ask for hyperlinks, you hyperlink the name of their business in an online article, and then they can see when the clicks come through to their site, but not everybody clicks from the article to the site. You know. They read the article.*

Another challenge that came forward was competition with other related business functions that were able to report better, as one participant explained:

Participant: *I think there's a lot of competition from digital marketers and I've seen the play between Facebook, clients involved in Facebook advertising, seeing it as more valuable than media exposure, but uhm, I can see the gaps in terms of reputational... they might have lots of traction and a big community and their communities are also through their partnerships, but I'm not seeing, kind of a... you know, I think with PR it's not just another marketing extension.*

[Should PR rather take over the roles of digital marketing and competition?] Yeah, PR's not good at promoting itself, hey. I think that we haven't defined properly the value... It's subtle. It's a subtle game. And I think if we owned...

These conversations around the challenges experienced by practitioners confirmed that global challenges are present in South African practice, and served to provide nuance for the scope and how these challenges are experienced in practice.

It was generally seen from interview information and quantitative data that:

- South African PR practitioners experience the same theoretical global challenges to a large extent. Of these, especially financial, time, lack of understanding/interest from clients/management, and lack of standardisation held a strong presence. Uncertainty over the value of PR and lack of research knowledge/expertise had the lowest presence. However, from interviews it appeared that these challenges often interlinked.
- Additional to these challenges, however, are challenges in practice that relate to the environment in which PR is practised and thus practitioners experience challenges with regards to competition, educating teams, and accessing metrics.
- Because the PR practice described throughout this chapter so far was seen to be less integrated and rather confined to specialist media roles, it is consistent that interview participants described technical challenges that largely related to output metrics.

Following this discussion on the challenges practitioners face, the next construct inquired into the different types of evaluation practitioners undertook in their practice.

5.3.4.3 Evaluation Types

The construct for evaluation types included several concepts measured. This investigated the different points at which evaluation took place across campaign lifespans (formative evaluation, process evaluation, summative evaluation), as well as the methodological nature of evaluation (quantitative evaluation and qualitative evaluation). In Section 3.3.4 it was held that these evaluation types are necessary in order to ultimately prove the value of the PR function, as was stated with the eighth theoretical statement:

Theoretical statement 8: *Different evaluation types must be employed throughout the evaluation process to prove value:*

- *Formative evaluation is necessary to inform PR goal setting and to set benchmarks for comparison during process reporting and for later comparisons.*
- *Process evaluation is necessary to conduct ongoing monitoring of PR efforts throughout the lifespan of PR programmes, tested consistently against benchmarks set through formative evaluation.*
- *Summative evaluation is necessary to prove that the objectives and goals of PR programmes were met after completing a PR programme, and must be used to report insights at strategic level.*
- *A combination of qualitative and quantitative research methods must be used to undertake formative, process, and summative evaluation and to determine and report on changes in outcomes.*

Different evaluation methodologies are strongly emphasised in the Barcelona Principles (see Table 3.5) and are mentioned throughout the complete draft of the principles: the fourth principle states directly that “Measurement and evaluation require both qualitative and quantitative methods”. In the second principle it is stated that “Both quantitative and qualitative methods should be used as appropriate” and the seventh principle addresses the reliability to state “All measurement should use valid methods and be reliable and replicable in the case of quantitative methods and trustworthy in the case of qualitative methods”. The quantitative results for this construct were captured as follows:

Table 5.22 Evaluation Types

Construct	#	Concept	% Strongly Disagree (1)	% Disagree (2)	% Neutral (3)	% Agree (4)	% Strongly Agree (5)	Mean
Evaluation Types	34	Formative Evaluation 1	1,9	4,9	23,3	37,9	32,0	3,93
	35	Formative Evaluation 2	-	7,8	20,4	44,7	27,2	3,91
	36	Process Evaluation 1	1,0	6,8	21,4	39,8	31,1	3,93
	37	Process Evaluation 2	-	3,9	16,5	46,6	33,0	4,09
	38	Summative Evaluation 1	-	1,0	16,5	40,8	41,7	4,23
	39	Summative Evaluation 2	1,0	2,9	28,2	38,8	29,1	3,92
	40	Quantitative Research	7,8	23,3	26,2	23,3	19,4	3,23
41	Qualitative Research	13,6	23,3	27,2	22,3	13,6	2,99	

Overall, respondents were in stronger agreement with undertaking formative, process, and summative evaluation than they were with undertaking qualitative and quantitative evaluation, as is seen from Table 5.22.

Formative research, pertaining to research in the planning of new campaigns (see Section 3.3.4), saw high agreement among respondents, with cumulatively 69.9% (n=72) agreeing and strongly agreeing with the item stating that they use research in the planning phase of new campaigns to set their strategy. This item saw very little disagreement, cumulatively at only 6.8% (n=7). The second item on formative evaluation pertaining to using data from previous campaigns' performance to inform future planning, saw similarly high agreement where cumulatively 71.9% (n=74) were in agreement to this practice. Again, disagreement was very low as only 7.8% (n=8) of the respondents disagreed and no respondents strongly disagreed. Formative evaluation was thus quantitatively seen to be a prominent activity among respondents in practice.

However, aiming to investigate this topic further through the interviews, no participants elaborated on their use of research in the planning phase of PR campaigns or projects. Multiple participants indicated that the variety of campaigns and projects differ too vastly to use research from past campaigns, but that they did use general platform readership statistics to make informed choices for publicity and this constituted their formative research.

From interviews it came forth that with PR comes an element of 'mystery' which often obscures information that can be used when planning campaigns. Participants had highlighted situations that they have encountered multiple times, where some publicity and media content simply wouldn't get published at one time, and at another time it performs exceptionally well. This indicated the difficulty in comparative evaluations (yet also leaned strongly towards the intention of using campaign data to

inform future campaigns). Participants that cited these points all attributed it to “the nature of PR” – where the media landscape is often unpredictable – as one participant explained:

Participant: ...where one month they had 5000 reads, and, you know, 100 000 impressions and 200 leads come through, and then the next month they had half. And they asked why. And I’m like “Man, it’s just the nature of the game”. But we learn from it. It’s like cool, I’ll never do this again.

Another participant shared this sentiment of the unpredictability of PR:

Participant: I’ve got a friend who does PR for [...] Firstly she says when she sits down in a meeting is “I guarantee you nothing. Literally, you are paying me to get you on the right platforms, to invite as many people as I can, but this is still PR functions. Am I gonna get you on MyBroadband, am I gonna get you onto News24, am I gonna get you onto 5FM? I’m gonna try, but they could say no”. You know. And I think that’s why the transparency is great.

From the onset, then, it is seen that practitioners generally agree to using formative evaluation, but that there is also an element of unpredictability hindering them from being completely accurate in this process. This is especially concerning if considered in the context of Arcos’s (2016) argument for PR’s expert knowledge of their own domain in order to advance to management ranks (see Section 3.3.5). What he called a “PR intelligence” dimension appears to be lacking among participants.

The next concept of evaluation types measured process evaluation, when evaluation takes place during the lifespan of a project or campaign. In terms of process evaluation, high levels of agreement were seen again among the majority of respondents. A large group of respondents (cumulatively 70.9%, n=73) indicated their agreement with this item, indicating that they track campaign progress throughout its lifespan. Only a cumulative of 7.8% (n=8) of respondents do not implement process evaluation as they indicated disagreement. As it pertains to making adjustments during campaigns and projects when problems are detected, the majority of the respondents (cumulatively 79.6%, n=82) indicated agreement with this, while only 3.9% (n=4) disagreed and no respondents strongly disagreed.

In qualitative discussions, most interview participants indicated at this point that ongoing (process) evaluation is more informal and less structured. However, especially agency-bound participants indicated that they provide monthly reports to clients throughout the lifespan of their campaigns. Regardless of their reporting, most interviewees indicated that they would (and do) immediately make adjustments to campaigns and projects when they see any performance issues – but this is not as part of a formal process. This could be read in context of the discussion on strategic alignment (Section 5.3.3.4) where practitioners may here again be guided by a “gut-feel”.

In conducting summative evaluation, over 80% of respondents agreed with this as part of their practice, as cumulatively 82.5% (n=85) of respondents strongly agreed and agreed, while only 1.0% (n=1) disagreed and no respondents strongly disagreed. It then also came forth that respondents strongly indicated that they use campaign evaluation to determine how the organisation/client has been affected by their PR activities, as the largest group of respondents (67.9%, n=70) indicated that they agreed on this topic and strongly agreed. Only a cumulative of 3.9% (n=4) disagreed to any extent that they determine how their activities have affected the organisation/client as part of the summative evaluation process.

From qualitative interviews, when prompted to discuss measurement and evaluation, most interviewees defaulted to explaining summative evaluation in the form of interval reports they compile as was described in Section 5.3.3.7. In contrast to the strong quantitative agreement for determining how the organisation/client has been affected by PR activities in the summative reporting process, multiple interviewees explained that this is not the case for them. They elaborated that they report on metrics, but that they do not, and do not aim, to interpret or explain the results for and to their organisations/clients. This was especially found to be true in agency-bound participants – in-house practitioners were seen to do more to show how their activities affected their organisation (see Section 5.3.3.7). For summative reporting, one in-house practitioner explained during interviews that they also provide different levels of reporting for different purposes:

Participant: *Yeah, so there's different reporting that we do. So there's a reporting that we do from a, you know, generic monthly reporting that goes to all our directors, and then there will be a reporting that goes to the board. And that's very, it's not really detailed, but it's to the point. So you kind of put, it's like a dashboard.*

For quantitative and qualitative research forming part of the measurement and evaluation process, quantitative research was seen to be more prevalent among respondents. The largest portion of respondents agreed to conducting quantitative research to inform their practice, with a cumulative of 42.7% (n=44) in agreement with this item, whereas agreement with the item on qualitative research scored lower at a cumulative of 35.9% (n=37). The majority of respondents tended towards neutrality on these items, or disagreement.

Considering two factors, the first being respondents' high formal education and the second being their own indication of knowledge of and confidence in applying qualitative and quantitative research methods, it seems counterintuitive that the actual implementation of these research methods is so low. One possible explanation for, this based on respondents' data, could be one or all of three things observed so far: 1) the low research skills on participants' teams as indicated earlier (Section 5.3.3.6),

2) time and financial constraints that were indicated as challenges (Section 5.3.4.2), and/or 3) practitioner roles for which undertaking this form of in-depth research does not form part of any of their roles (Section 5.3.3.3). From qualitative interviews, multiple respondents indicated that they gain access to this research via clients using external research agencies or via third party research conducted by media houses (for example), which may eliminate the need for them to conduct it at all. However, one interviewee suggested that they consciously steer away from conducting this type of research as PR practitioners should “stick to their trade”. In Section 2.3.1 it was highlighted that measurement and evaluation can inform organisational strategy and shape strategic communication management (Macnamara & Gregory, 2018). However, from these findings it would appear that this cannot be true for this study’s participants as the levels of research is simply too low. This topic did not enjoy much attention during interviews, as participants did not conduct this research on a level that justified much discussion owing to a lack of perceived need thereof (see Section 5.3.3.6).

Combining quantitative and qualitative insights on this construct, the following point arose this study’s research population:

- Quantitatively there were relatively strong indications of different evaluation types. Summative evaluation was most prominent, followed by process evaluation, and then formative evaluation. While the indication for quantitative research was relatively high, qualitative research is seen to have significantly lower prevalence in practice.
- The variety in different PR campaigns makes formative evaluation a complicated task. Though quantitative agreement was high, qualitative interviews explained more about the difficulties that lie herein and it is largely attributed to the “unreliable” and “unguaranteed” nature of PR.
- Process evaluation is considered an informal process, yet widely implemented in practice. This practice is used to 1) send ongoing (monthly) reports to clients throughout campaign lifespans, and 2) make immediate adjustments to the run of events if some activities fail.
- Summative evaluation is widely practiced, yet less often used to determine how organisations/clients were impacted in actual practice.
- There is a perceived lack of need for qualitative or quantitative research for evaluation. Where it was needed, external resources were used. However, this is decidedly not a common PR evaluation activity.

Following this discussion into when practitioners conduct evaluation at different points of campaigns, and the extent to which different research methodologies are utilised for these activities, the level of measurement is discussed next.

5.3.4.4 Measurement Maturity

As far as measurement maturity goes, items included pertained to measurement at outcome, outtake, and output level. This combination offers an indication of the measurement maturity level that is seen in practice.

Theoretically, it was seen that the level of measurement maturity found in practice is a necessity for conducting rigorous measurement that can accurately inform evaluation to ultimately report on the value of the PR function (see Section 3.4). Measurement maturity was seen in the ninth theoretical statement that was captured as follows:

Theoretical statement 9: AVEs and multipliers, as well as the injudicious use of ROI, are definitively discredited metrics that have to be eliminated from practice. Reliable and valid measurement metrics must be employed at all measurement levels:

- *Metrics must set benchmarks for future assessments and successful activities at outcome, outtake, and output levels in order to determine effectiveness of activities and true change in outcomes.*
- *Social media outcome metrics must be used consistently with other media metrics.*

In terms of measurement maturity, quantitative survey data reported respondents' practices as follows:

Table 5.23 Measurement Maturity

Construct	#	Concept	% Strongly Disagree (1)	% Disagree (2)	% Neutral (3)	% Agree (4)	% Strongly Agree (5)	Mean
Measurement Maturity	42	Output Level	2,9	5,8	13,6	36,9	40,8	3,25
	43	Outtake Level	13,6	12,6	29,1	32,0	12,6	3,17
	44	Outcome Level	8,7	17,5	27,2	33,0	13,6	4,07

Three concepts were included in this construct, each requiring an indication of the extent to which each level of measurement is practised. As is seen in Table 5.23 above, the strongest agreement among respondents was with output level metrics, where cumulatively 77.7% (n=80) of respondents agreed to any extent that they conduct measurement using output metrics, while only cumulatively 8.7% (n=9) disagreed or strongly disagreed.

The next highest agreement was seen for conducting measurement using outcome metrics, as 46.6% (n=48) cumulatively agreed. Disagreement with outcome level metrics was higher, however, as cumulatively 26.2% (n=27) of respondents disagreed to some extent.

In terms of measurement using outtake metrics, respondents were the least in agreement and the most neutral compared to the other levels, indicating that outtake level metrics are the least used in practice. The largest portion of respondents (44.6%, n=46) indicated that they agreed or strongly agreed to measuring outtake level metrics, but 29.1% (n=30) were neutral, 26.2% (n=27) cumulatively disagreed or strongly agreed.

This finding from the quantitative data indicates a relatively high level of measurement maturity in practice. However, from interviews this was not the case. In the interviews conducted, the majority interviewees focused and explained their measurement in terms of output level metrics. Most participants described an output-focused report, as one participant described:

Participant: *...at the end of every month, each client gets their own report, which basically, sort of go through elements that have been covered, coverage they've received so whether it's print or online, using, I use Pear media monitoring and evaluation [software]. And they basically give me all the media coverage for each of my clients. I will be upload all of that content into my report.*

Considering this alongside the earlier mention of low research practice (Section 5.3.3.6) and low interpretation during reporting (Section 5.3.3.7) and summative evaluation (Section 5.3.4.3), it seems unlikely that true outcome-level evaluation is found in practice among participants of this study, as suggested by the quantitative data.

From interviews it was clear that output level metrics were widely implemented and relatively easy to include. Most participants cited page views, click-throughs, reach, engagement, impressions, audience sizes, webpage hits, views, downloads, and followers. This confirms the findings of Zerfass *et al.* (2017) that found most practitioners to still be reporting on output-level metrics (see Section 3.4.1). Sentiment and engagement were also indicated as outtake-level metrics employed by participants. Multiple participants could easily describe their measurement maturity in terms of the metrics they used – however, when asked how these metrics could be tied to business objectives, an inclination to go on “gut-feel” was mentioned:

Participant: *Visibility. Media visibility. Different clients, like my [client], he wants signups, he wants applications. And his was... yeah, signing up... and then corporates sponsoring, getting more corporates on board sponsoring these young people [...] So if he's starting to get resonance and traction in terms of people signing up, then he'll figure out the campaign was successful. And obviously I need to tie that down to spend and get a sense of the raw numbers and how much he wants to spend per person who signs up.*

[How do you report back on "visibility"? Are they satisfied with media placements or impressions or even AVEs?] No, not even. It's gut, hey. It's just gut.

In response to how participants go about selecting the output metrics they use, one participant stated that:

Participant: *Any metric is valuable as long as it gives value to the clients, you know.*

Furthermore, it was seen that the expectations are also set by clients in terms of what they ultimately want from PR:

Participant: *I've had other clients who basically say I want people to see me. I want to be top of mind. So if people think "lawyer" they think of me. So within the first six weeks of working with this company the MD is like "It's wonderful, whether I go for meetings down in the South or if it's up a meter away, people are like 'I've seen you everywhere!'" and that's exactly what you want. So it depends on the client.*

From interviews it generally did not appear that delivering on the different outcomes expected by clients and management is an issue for most practitioners. However, responses again indicated a shallow understanding of the PR function as interviewees defaulted to output metrics and only media practices:

Interviewer: *[When clients want different things, do you find that delivering on different metrics is an issue?]*

Participant: *I haven't really had to worry too much about that. I think finding the right media monitoring company that's reliable is of paramount importance. And also not being ripped off, so at least knowing that you're getting the notification when your clients get coverage so that you can be the one phoning the client saying "hey, you've been featured on page three" and not the other way around.*

In interviews, Return on Investment (ROI) was seen to be regarded by some respondents as an irrelevant metric:

Participant: *Those days are gone [the days of using ROI]. It's about bums in seats at events. It's about your website traffic, it's about the fact that we're using [our awards ceremony]. And this is a recipe we are adjusting as we go.*

On the other hand, some interviewees indicated ROI to be the most valuable metric used to explain the value of PR to clients and ROI is regarded an outcome-level metric:

Participant: *ROI is another word that people use in PR. [...] I'll go into a meeting and they're like "cool, I'm giving you R50 000 this month, what's my ROI?" So I'm like I don't know, I've got no idea. And they're like what do you mean you have no idea? And I'm like well, I'll tell you what, when we run these campaigns for you and you get, say, three clients out of it, what's the average price of your product? And they're like a hundred thousand Rand, so I'm like if you do R300 000 in sales for R30 000, your ROI is 1000%. I'm like that's your ROI. We tie ROI to what's the client actually getting out business-wise.*

Some participants admitted that their measurement maturity could improve and that there is a need for more sophisticated measurement on top of output metrics to provide a deeper understanding of PR's business value. One participant in particular voiced this concern at multiple points of the discussion:

Participant: *Could we improve, should we go a bit deeper? Sure...*

I think there should be a quantitative... which is these basic likes, click-throughs, etcetera, that would substantiate, but then a qualitative metric around what does it actually mean for your business.

What I would like to know is if there's an article on a news portal, is there a URL that would indicate the number of people that have actually seen the article.

I'm not a metrics specialist. I think there should be a quantitative, which is these basic likes, click-throughs, wadda wadda, that would substantiate, then a qualitative metric around what it actually meant for your business.

One interviewee indicated that stronger measurement maturity may also be a business imperative:

Participant: *I think that we [agencies and clients] would have a more qualitative conversation. I don't think I lose clients necessarily. But... But, you know, for a long time, I felt on the back foot with clients. And I think just having this... it's the professionalism that's... you want all the things to line up.*

Last year I stopped working with a very nice business. They were doing a lot of content PR and social media. And they didn't see the value of an ongoing media presence or even in a smaller way. [...] so I was sorry about that, because I didn't have... in that two-year relationship, I didn't really get the metrics... yeah... I think one of the things working in the industry is that you're just so busy just keeping things together. But I am gonna change that. That's why I was interested when I got your survey. We're gonna get somewhere on this.

When prompted, interviewees indicated that outcome level metrics were determined at the hand of business outcomes in terms of leads, sales, partnerships, or memberships. One in-house participant explained:

Participant: *It's going to be very informal, how we measure it, okay. So for us, it's all about membership. I mean, how much membership are we actually getting in. [...] And the goals we've gotten for PR is like getting our AVE, for instance, getting that up, making sure the [organisation's] name is literally in a few of the publications and stuff. [...] But I mean, I'm online and all of that. That's all our, you know, we handle that. And we measure that by increase in membership, increase in website traffic. [...] Then also, like I said, an increasing membership, an increase in people awareness, event attendance.*

And we measure our success, basically, on the attendance and the engagement or click-throughs is or posts or reshares. And I think that is a much better way to actually measure. And it's a newer way to measure, than going back with "Okay, so we got this much advertising space, and we got this much, you know, exposure. And possibly so many people might have seen our article". That's nonsense. It's about are you getting people to events? There used to be 50 people at our events. Now there's over 105.

Another participant, however, was able to articulate the different levels of measurement metrics clearly. This was also the participant that implemented the Barcelona Principles. The participant described their measurement maturity as a process consisting of three levels – awareness, engagement, and impact. These levels were consistently used to plan, measure, and report on campaigns. The participant explained this at one point as follows:

Participant: *Because you could measure, but is it enough, is it what you really want? So it would look at things like from communication, if it's just a generic email to send out to clients? Would it change the way we send out that email? Don't use our own, because you won't have stats. So we said, let's use an email marketing tool, because then you start having meaningful targets. If we send out an email to 3000 clients, a certain percentage needs to open the emails, that certain percentage that opened the emails, another percentage needs to have clicked on downloading the information or visiting our website. So that's ready now to look further. So those are the analytics we do from comms. From PR, same thing. And I mentioned earlier, PR with awareness. How many medias did we send a press release to, what's the reach, that type of, again, coming back to the end to an impact. So there's that engagement. So there's the awareness, engagement, and the impact. So from engagement, did you get calls from the media saying that we need to interview so-and-so, and the impact is after we got we've got the interview, did people actually contact us to get more information? Did we get a lead? You know, for clients and as prospective clients. So that's the impact we measure.*

This participant also emphasised the importance of metrics and outcomes, set at different levels, to manage expectations from PR agencies' measurement:

Participant: *It's unfair for us practitioners to say that the PR agencies are not delivering, or is not giving us a certain aspect of analysis. If we are not upfront of what we expect from the PR agency, and what are deliverables, you will not get what you are looking for. You will always get frustrated.*

Overall, the quantitative data and qualitative information posed strong contrast in terms of measurement maturity, as quantitative data indicated a much higher level of measurement maturity than was seen anywhere in qualitative interviews. Up to this point, from quantitative and qualitative inquiry, the following points arose:

- As far as quantitative results show, outcome level metrics were the most prominent among respondents, followed by output level metrics and then outcome level metrics. Quantitatively, this indicates high measurement maturity.
- In-house practitioners are more inclined to provide outcome-level metrics, and agency-bound clients default to output-level metrics.
- Outcome-level metrics were particularly rare in practice and almost no mention was made of it in interviews, while it showed the lowest prominence in quantitative data.
- Output-level metrics are considered acceptable, as many practitioners are not required to provide more than these metrics.
- Considering the combination of these results, measurement maturity may often be misinterpreted in practice and deemed higher than it is in reality.

Measurement maturity could be influenced both by what practitioners and agencies are offering, as well as client expectations. It was seen from interview information that in strategic practice, practitioners are better able to articulate measurement maturity. However, when clients are complacent with output-level metrics, agencies are less likely to incur the extra cost and effort to obtain higher-level metrics.

A closely related concept pertaining to the integration of measurement, is social media discussed next.

5.3.4.5 Social Media Measurement

The construct of social media measurement conducted as an integrated measurement with other PR activities was included in the empirical component as it constitutes one of the seven Barcelona Principles that reads that “Social media can and should be measured consistently with other media channels” (see Table 3.5).

Table 5.24 Social Media Measurement

Construct	Question Number	Concept	% Strongly Disagree (1)	% Disagree (2)	% Neutral (3)	% Agree (4)	% Strongly Agree (5)	Mean
Social Media	45	Social Media	2,9	5,8	22,3	32,0	36,9	3,94

This is a simple descriptive single item construct and the largest group of respondents' indicated their agreement – a cumulative proportion of over 60%. The majority of respondents strongly agreed or agreed (68.9%, n=71) to measuring social media with other PR activities. This high agreement, as well as how interviewees described their measurement, gives a strong indication that PR practitioners do not distinguish social media as an activity any different from other traditional PR activities. However, a respondent group of 22.3% (n=23) were neutral on this item, while 8.7% (n=9) of respondents disagreed and strongly disagreed. This disagreement may stem from respondents that did not utilise social media as part of their PR activities, or it could point towards a more segmented measurement practice.

Through interviews, however, it became apparent that many practitioners don't see or offer social media as part of their PR service. This was exclusively indicated by agency-bound practitioners who do not offer social media as part of their service offering to clients (though most have done it on occasion, and on clients' requests). The quantitative group of disagreeing respondents may therefore well be agencies and practitioners for whom social media fall outside their scope and thus they cannot agree to measuring it. However, for all in-house participants measuring social media alongside other PR activities was an obvious activity, and was conducted as such (see Section 5.3.3.4).

The general summary from this data and information is that:

- Most quantitative respondents indicated strongly that social media is measured consistently with other activities, but from interviews it was seen that many PR agencies do not offer social media as part of their service offering and therefore do not really emphasise its measurement or its role in evaluation.

5.3.4.6 AVEs

Inquiring into another particular Barcelona Principle (see Table 3.5), Advertising Value Equivalence (AVEs) investigated the actual implementation of both AVEs and multipliers among practitioners (see Section 3.4.1). The Barcelona Principles, and many accompanying industry movements, aims to eradicate this practice entirely. The quantitative data for this construct are reported below:

Table 5.25 AVEs and Multipliers

Construct	#	Concept	% Strongly Disagree (1)	% Disagree (2)	% Neutral (3)	% Agree (4)	% Strongly Agree (5)	Mean
AVEs	46	AVEs	18,4	13,6	18,4	24,3	25,2	3,24
	47	Multipliers	36,9	18,4	19,4	12,6	12,6	2,46

The majority of respondents, cumulatively 49.5% (n=51), agreed or strongly agreed to using AVEs in their measurement and reporting. However, cumulatively 32.0% (n=33) of respondents disagreed or strongly disagreed. Pertaining to applying multipliers in this practice, there was less agreement among respondents. The largest group of respondents constituted a cumulative of 55.3% (n=57) that strongly disagreed or disagreed with the use of multipliers. The smallest group of respondents agreed with the use of multipliers, constituting a cumulative of 25.2% (n=26) that agreed or strongly agreed. It is therefore seen that the use of AVEs is far from being eradicated in South African PR practice (among respondents of this study) and that this use of AVEs is seldom accompanied by the use of multipliers.

In so far as the difference between the popularity of AVEs versus the dislike for multipliers, interview participants were helpful to provide possible explanations. The majority of participants agreed to using AVEs, most of them adding that their clients liked the figure very much as they could clearly see the difference then between the value of PR spend and the value of advertising spend (and were as a norm greatly impressed with PR's success to achieve this). Multiple respondents also cited that they include it for the sake of including it, as it comes standard with the metrics exported from media monitoring software.

However, some interviewees had a much less favourable attitude toward the use of AVEs and multipliers. These participants cited that they felt that reporting on AVEs is flawed, only used as a last resort, or even detrimental to the PR industry:

Participant: *AVE is not the only measure – hence executives are not taking us seriously.*

PR just use whatever we get, whether it's AVE... and for me, AVE should be the last. I look at AVE like, if you had to equate all of this into Rands and Cents, it would cost this much. But it's changing, even in the boardroom. We need to measure the impact, the awareness. And how do we actually measure that? What is our target? How do we identify those triggers that says 'We've done XYZ, and this is what we're going to measure as success'.

The participants made a clear distinction between AVE and ROI, where they view ROI as a metric tied to business goals – indicating a conversion that helped the company grow and the preferred metric over AVEs. One participant explained their view on the difference between AVEs and ROI as follows:

Participant: *I don't know, I think its two very different things. Like I said, AVE is flawed. Should I be comparing a flawed system to, you know, an actual ROI.*

The general thoughts around AVEs from interviewees seemed to be that they use it, even though they know that it is void of meaning:

Participant: *I do... I don't really like resting on that... Okay, so then you go and pitch it. What? I want one interview on radio and television and three on radio and two in business media and three in tech. So click, you've done this. What does it mean? Tier 1, tier 2, tier 3 media. What does it mean?*

Participants explained that they did not see the value of multipliers, especially when an AVE figure is already reported as clients could blatantly see that it is a mere multiplication and did not buy into its justification to say that PR is worth even more than what is shown with AVEs:

Participant: *...and then quite a few, well most PR companies, will multiply that value by three and they call that the PR value. [...] I've never ever done that. [...] Because I don't think it's necessary. Clients are already like "Wow, this would have cost me 23 grand for that space. That's amazing." Why then multiply it by three and say that's the PR value? I don't know. Clients don't seem to be as impressed by that. In my space, anyway. They're like, it's not a biggie for them. And they can see its literally been multiplied by three.*

To these participants, multipliers only serve to water down the value of PR and using it is unethical. This explains the quantitative data to a larger extent, where AVEs are used but multipliers are deemed to be detracting from its value.

From this section, the following key points are noted:

- The use of AVEs is still high among participants in this study, as quantitatively about 50% of respondents agreed to using AVEs and multiple interview participants readily agreed to using AVEs. However, quantitatively, the prevalence of using multipliers in practice was much lower.
- Practitioners are deeply divided on the topic of AVEs and multipliers, where some regard it as a completely acceptable, commonplace metric, and others regard it a metric that should be entirely banned, hurting the industry, and unethical to implement.
- Where stronger strategic practice was seen, the sentiment towards AVEs was more negative in interview participants. However, negativity towards this metric was also seen in practice with very low strategic inclination, leading to the conclusion that the position towards AVEs and multipliers may be strongly influenced by mere exposure to information about its legitimacy.

Following this descriptive discussion that aimed to outline the South African PR landscape, the third specific research question can be answered – *how do South African PR practitioners measure and evaluate their PR efforts and report to management?* There appear to be no simple delineations, and that context – especially agency-bound or in-house PR practice – has a great impact on how PR is practiced, how practitioners view and value their own work, and how they ultimately measure and evaluate and report to management on the PR function. Overall it is concluded that while practitioners regard their work to be of highly strategic nature, their level of strategic involvement, practice, and impact is limited to a traditional media liaison role. This was seen in most indicators of a strategic function in PR practice – strategic access, symmetric worldview, strategic alignment, low reporting on insights. A point of concern is the strong qualitative and quantitative indications that PR practitioners in South Africa fulfil multiple roles and are responsible for technical implementation, management, as well as strategising.

In terms of measurement and evaluation, it appeared that South African PR practice lacks in measurement maturity due to a variety of factors – many which originate in their approach to PR practice. As practice is limited to media liaison practices, measurement and evaluation is largely focused on output metrics pertaining to media/publicity practices and therefore it becomes almost impossible to report on insights and provide stronger reporting on business impact. The contrast here could be plainly seen in the cases of true strategic practice and the difference in how measurement and evaluation were conducted and reported on for these practitioners as they were able to describe a much more strategic approach. The focus on output metrics also showed that the use of AVEs is still standard practice in South Africa, though the same is not true for multipliers.

The challenges practitioners face in terms of measurement and evaluation corresponded, to a larger extent, with challenges faced by practitioners globally. However, certain environmental challenges arose for South African practitioners which included competition with business divisions, educating their teams, and accessing metrics. Considering the prevalence of technical roles conducted by this study's population, it is coherent that most challenges participants described related to their technical role and specifically to accessing reliable output metrics.

Focusing on standardised measurement and evaluation, it appeared that its uptake in South African practice is low. Awareness of the Barcelona Principles is low, implementation thereof is even lower, and it was even seen that measurement and evaluation is not formalised in some cases. A tentative conclusion is made here that PR practitioners in South Africa need to be more strongly educated or informed of the strategic capabilities of an integrated, strategic communication management practice. Once PR practice moves away from only providing media liaison and publicity services, the overall

maturity of practice can be improved and this will lead to practitioners more easily adjusting to globally standardised measurement and evaluation practices. If practice matures, practitioners will be able to look to global standardisation measures and not feel alienated or feel that it is irrelevant to their practice.

This discussion leads into the following major section of this chapter, discussing the comparative analyses of practice and measurement and evaluation constructs to determine exactly how these influence each other.

5.4 Factors and challenges of measurement and evaluation

This section of the chapter is aimed at generating a deeper understanding of South African PR measurement and evaluation in order to determine the factors and challenges that influence South African PR practitioners' adoption of the Barcelona Principles. This will allow for answering the fourth specific research question, as explained in this chapter's introduction. Correlation tests are used to describe and discuss the data as it pertains to the relevant practice-related constructs and the Barcelona Principles, challenges, evaluation types, measurement maturity, social media, and AVEs. Effect sizes to indicate practical significance is utilised to interpret the results of statistical analyses which will allow for determining how the various constructs influence one another.

5.4.1 Correlations of practice and measurement and evaluation

As discussed in Section 4.6, Spearman's correlation coefficient (r_s) were used to determine correlations between specific constructs and concepts that were identified and discussed throughout the literature review of this study (Chapters 2 and 3).

5.4.1.1 Correlations with Reporting on Insights

The construct reporting on insights was tested to determine its correlation with multiple constructs and concepts. This test provided insight into the theoretically discussed reflective paradigm (see Section 2.2) to determine the practice-related constructs that influence practitioners' practice of interpreting the organisational environment and PR activities in order to 1) generate suggestions to management/clients, and 2) translate the impact of PR activities. The theoretical interpretive framework for these statistics was discussed in Section 4.6.1.6.2 and are here summarised below each table. Table 5.26 details the correlation coefficients found among practice-related elements, sorted from high to low for ease of interpretation:

Table 5.26 Correlations of Reporting on Insights (r_s)

	Reporting on Insights
Evaluation Types	0,770
Formative Evaluation	0,725
Relationships	0,644
Summative Evaluation	0,622
Process Evaluation	0,620
Measurement Maturity	0,541
Symmetric Worldview	0,524
Strategic Access	0,464
Strategist	0,433
Qualitative Research	0,393
Quantitative Research	0,323
Practitioner Role	0,317
Manager	0,209
Technician	0,056

Guideline values:

~0.1, small, no practical significant relationship

~0.3, medium, practical visible relationship

~0.5, large, practical significant relationship

Table 5.26 showed multiple practically significant correlations. This analysis showed that the construct evaluation types had a large correlation ($r_s=.770$) with practitioners' reporting on insights, especially in terms of formative evaluation ($r_s=.725$). It also had a practically significant correlation with the other concepts relating to evaluation types including summative evaluation ($r_s=.622$) and process evaluation ($r_s=.620$). It then showed a large correlation with the relationships construct ($r_s=.644$), measurement maturity ($r_s=.541$) and symmetric worldview ($r_s=.524$).

These practically significant correlations strongly support literature discussed throughout Chapter 2 where the elements of relationships and a symmetric worldview were seen to be antecedents, or enablers, of a practitioner's ability to report on insights in the functional and relational paradigms. It was also seen in Chapter 3 that rigorous evaluation types enhanced the practitioner's ability to report on insights from a measurement and evaluation perspective. It is notable that these results support the theoretical argument for practitioner roles very clearly – the strongest correlation between different practitioner roles and reporting on insights is seen with the role of strategist ($r_s=.433$), and the lowest correlation is seen with that of technician ($r_s=.056$). This finding indicates that the role of the practitioner is associated with their inclination or ability to report on insights.

5.4.1.2 Correlations with Strategic Alignment

The construct of strategic alignment relates to the degree to which PR practitioners align PR activities with the organisation/client's overall strategy (see Section 2.3 and Theoretical Statement 2). In theory, this alignment should enable practitioners to ultimately report on outcome-level metrics that show PR's impact, and its practice of setting measureable goals would further enhance strategic alignment and reporting on impact (as was stated with Theoretical Statement 7). From literature it was also seen that the degree of strategic access influences the degree of strategic alignment, for if practitioners do not have access to strategic information then strategic alignment becomes near impossible (Theoretical Statement 3). It also follows that the practitioner should, theoretically, fulfil a strategic role if they are to bring about a measure of strategic alignment.

The concept of strategic alignment was thus tested to determine correlations with measurement maturity (output, outtake, and outcome levels) and practitioner roles (technician, manager, and strategist). Table 5.27 displays the correlations seen between these constructs and concepts:

Table 5.27 Correlations with Strategic Alignment (r_s)

	Strategic Alignment
Outtakes	0,491
Outcomes	0,444
Outputs	0,372
Strategic Access	0,359
Strategist	0,332
Manager	0,300
Technician	0,243

Guideline values:

~0.1, small, no practical significant relationship

~0.3, medium, practical visible relationship

~0.5, large, practical significant relationship

From Table 5.27 it is seen that the construct of strategic alignment has large correlations with the concepts relating to measurement maturity, especially outtakes ($r_s=.491$) and outcomes ($r_s=.444$), though a medium correlation is seen with outputs ($r_s=.372$) as well. From these analyses it appears that strategic alignment impacts measurement maturity and that in the practice or absence of strategic alignment, mature measurement is enabled or disabled. It then showed a medium correlation to practitioner role ($r_s=.406$), especially in terms of the strategist role ($r_s=.332$) and the manager role ($r_s=.300$), but no correlation with the technician role. It also showed a medium correlation with strategic access ($r_s=.359$). This confirms the theoretical ideal for PR best practice where strategic alignment will be facilitated through strategic access by a practitioner in a strategic role to also be true for this study's participants.

These analyses indicate that strategic alignment is facilitated in PR practice where the PR practitioner functions as strategist, has strategic access, and can then produce a higher level of measurement maturity. If practitioners are to measure the value of the PR function at outcome level to show how their efforts have impacted the organisation, they must move towards role specialisation as strategists and enhance strategic access to grant them insight into organisations' business imperatives.

5.4.1.3 Correlations with Practitioner Role

In terms of theoretical constructs that correlated with practitioner roles as strategist, manager, and technician, several constructs were identified to determine whether practically significant correlations could be seen among respondents. The three practitioner roles were each analysed in terms of its correlation with strategic access, reporting on insights, and practitioners' level of education. Table 5.28 depicts the correlations found in this analysis:

Table 5.28 Correlations with Practitioner Role (r_s)

	Technician	Manager	Strategist
Reporting on Insights	0,056	0,209	0,433
Strategic Access	0,053	0,170	0,294
Education	-0,035	0,009	0,089

Guideline values:

-0.1, small, no practical significant relationship

-0.3, medium, practical visible relationship

-0.5, large, practical significant relationship

From Table 5.28 above it can be seen that reporting on insights had a practically significant relationship with the role of strategist ($r_s=.433$), while its relationship with the roles of manager and technician strongly deteriorated. The strategist role also showed a medium correlation ($r_s=.294$) with strategic access but showed a no correlation ($r_s=.089$) with the practitioner's education level. Notable from this table is also the instance where an inverse correlation is seen between the role of technician and education. This indicates that practitioners' level of education may impact the role they are fulfilling, whereas one increases/decreases, the other decreases/increases. Thus, it may be true that where practitioners have a higher level of education, they are less likely to fulfil a technical role and vice versa.

Practitioner roles were next analysed to determine possible correlations with the challenges practitioners are facing in terms of measurement and evaluation. From literature it was seen that measurement and evaluation is a strategic function and that the challenges practitioners face often differ depending on what role they fulfil (see Section 3.2.1). It was thus anticipated, based on previous

global research, that the role of technician will show a stronger correlation with time as challenge, and that the role of manager will correlate with financial restraints and understanding and interest from management/clients. Table 5.29 sets out the correlations that were tested among this study's participants in terms of practitioner roles and challenges:

Table 5.29 Correlations with Practitioner Roles and Challenges (r_s)

	Technician	Manager	Strategist
Financial Restraints	0,170	0,169	0,122
Time	0,273	0,117	-0,031
Lack of standardised terminology and practices	0,176	0,177	0,050
Lack of Knowledge	0,166	-0,010	-0,088
Uncertainty over what constitutes the value of PR	-0,022	-0,161	-0,061
Lack of understanding/interest from management/clients	0,078	-0,085	-0,105

Guideline values:

- ~0.1, small, no practical significant relationship
- ~0.3, medium, practical visible relationship
- ~0.5, large, practical significant relationship

From Table 5.29 it can be seen that there were no practically significant relationships found among the challenges experienced by practitioners and the role they fulfil. This may be attributed to the fact that most practitioners fulfil all roles and thus, because there is almost no role specialisation, they would experience these challenges regardless. In this aspect, then, qualitative information that highlighted other challenges faced by South African PR practitioners were more illuminating. Overall the descriptive data provided in this chapter's first major section proved to be more useful in exploring the challenges practitioners faced in measurement and evaluation. As such, it was seen in that discussion that the nature of PR practice creates certain challenges, especially to standardised measurement and evaluation, as immature practices emerged which cannot be expected to lead to mature measurement and evaluation. The respective practitioner roles were next analysed in terms of their correlations with strategic alignment. Table 5.30 shows the summary of this test:

Table 5.30 Correlations with Practitioner Roles and Strategic Alignment (r_s)

	Technician	Manager	Strategist
Primary Strategic Alignment	0,224	0,288	0,442
Strategic Alignment	0,243	0,300	0,332
Measurable Goals	0,190	0,280	0,227
Secondary Strategic Alignment	0,174	0,222	0,179

Guideline values:

- ~0.1, small, no practical significant relationship
- ~0.3, medium, practical visible relationship
- ~0.5, large, practical significant relationship

From the concepts contained in the construct strategic alignment it is seen in Table 5.30 that the strategist role correlates strongly to primary strategic alignment, which can be expected as this is the level of operations where PR goals are aligned with organisational goals in order to enable outcome-level measurement. However, this pattern is not seen across the other constructs tested against practitioner roles. Again, this may be attributed to the fact that practitioners fulfil multiple roles and so there is no one role that can particularly correlate to strategic alignment and the concepts contained therein. However, it is still notable that stronger agreement with the strategist role generally showed slightly higher correlations with strategic alignment concepts.

The assumptions made in this study's theoretical discussions, that a strategic practitioner role ties to strategic practice, can therefore not be confirmed for South African PR practice as their role specialisation is low in practice.

5.4.1.4 Correlations with Symmetric Worldview

This analysis was conducted in order to determine possible correlations between the symmetric worldview of organisations/clients' organisations and practitioners' focus on relationships, the roles they fulfil, and to what extent they are reporting on insights. It was informed by the theoretical discussions in Chapter 2, specifically Section 2.3.3.2 and Section 2.4, and captured in the fourth and fifth theoretical statements that proposed this link between organisational worldview, stakeholder dialogue, and the effect of stakeholder relationships on organisational impact and reporting on relationships to show impact (see Section 2.4).

The results of this analysis are reported in Table 5.31:

Table 5.31 Correlations with Symmetric Worldview (r_s)

	Stakeholder Dialogue	Innovation	Symmetric Worldview
Reporting on Insights	0,530	0,370	0,524
Relationships	0,510	0,398	0,508
Strategist	0,182	0,157	0,202
Manager	0,185	0,172	0,194
Technician	0,071	0,179	0,138

Guideline values:

~0.1, small, no practical significant relationship

~0.3, medium, practical visible relationship

~0.5, large, practical significant relationship

Table 5.31 shows that the construct reporting on insights correlated strongly with the construct of symmetric worldview ($r_s=.524$) but also with one of its concepts, stakeholder dialogue ($r_s=.530$) and a medium correlation is seen with the concept of innovation ($r_s=.370$). A similar pattern is seen with the reporting on insight's correlation with relationships – a strong correlation is seen with the construct of symmetric worldview ($r_s=.508$) and the concept of stakeholder dialogue ($r_s=.510$), while a medium correlation is seen with the concept of innovation. This shows that there is a definite relationship between symmetric worldview and the constructs of reporting on insights and relationships, but that Innovation plays a smaller role in this than stakeholder dialogue. Stakeholder dialogue, therefore, may be the key to promoting reporting on insights and relationships when applied in the context of a symmetric worldview.

The constructs for practitioner role were tested against the construct of symmetric worldview and the concepts contained therein in order to determine whether an organisation/client's worldview would have an enabling effect on the strategic role of the practitioner, but again no practically significant relationships were found among any practitioner roles. While the correlations found were not significant, it is interesting to note that the roles of strategist ($r_s=.202$) and manager ($r_s=.194$) correlated more with a symmetric worldview, than was the case for the role of technician. It could tentatively indicate that the theoretical arguments that were upheld in the literature review of this study (see Section 2.3.3) which held that practitioners function more strategically in a symmetrical worldview or that strategic practice bring about symmetry for organisations, may be true for South African PR practice.

5.4.1.5 Correlations with Relationships

The extent to which the construct of relationships, pertaining to stakeholder relationship building and stakeholder reporting, were influenced by key factors in practice (including practitioner roles, practitioners reporting on insights, their strategic access, and the extent of strategic alignment that respondents have indicated), were investigated next. Theoretically it was seen that these concepts should have bearing on one another, and have an enabling effect (see Section 2.4).

Table 5.32 indicates multiple practically significant correlations found in this analysis:

Table 5.32 Correlations with Relationships (r_s)

	Stakeholder relationship building	Stakeholder Reporting	Relationships
Reporting on Insights	0,510	0,621	0,644
Strategic Alignment	0,494	0,549	0,588
Strategic Access	0,260	0,290	0,303
Strategist	0,164	0,222	0,217
Manager	0,089	0,071	0,092
Technician	0,155	-0,055	0,015

Guideline values:

-0.1, small, no practical significant relationship

-0.3, medium, practical visible relationship

-0.5, large, practical significant relationship

From Table 5.32 it is seen that the construct relationships and its concepts correlate strongly to practitioners' indications of reporting on insights, with an effect size of $r_s=.644$. The construct also showed a strong correlation to strategic alignment ($r_s=.588$) and a medium correlation to strategic access ($r_s=.303$). No practically significant relationships were found among practitioner roles and relationships, which again may be attributed to practitioners that fulfil all roles.

It is thus seen that while the practitioner role has no bearing on practitioners' relationship-building or stakeholder reporting in this dataset, stakeholder relationships impact strategic alignment and strategic access and an eventual reporting on insights. Importantly this indicates that where practitioners are inclined towards stakeholder relationship building and stakeholder reporting, they can report on insights. The strong correlations displayed in Table 5.32 may also be indicative of strategic access and strategic alignment aiding practitioners in stakeholder relationship building and –reporting.

5.4.1.6 Correlations with Challenges

Regarding the measurement and evaluation challenges faced by practitioners, multiple constructs were tested to determine how PR practice and practitioners affected or impacted these challenges. The construct for challenges as a whole was also tested against the different practice and practitioner constructs to provide a high-level overview of how different practice elements influence the challenges faced. The results of these tests are shown in Table 5.33:

Table 5.33 Correlations with Challenges (r_s)

	Financial Restraints	Time	Knowledge	Value	Understanding/ Interest	Standardisation	Challenges
Technician	0,170	0,273	0,166	-0,022	0,078	0,176	0,249
Reporting on Insights	0,053	-0,188	-0,229	-0,201	-0,149	-0,151	-0,235
Measurement Maturity	0,089	0,129	0,051	0,043	0,088	-0,052	0,079
Manager	0,169	0,117	-0,010	-0,161	-0,085	0,177	0,034
Strategic Access	-0,095	-0,074	-0,031	0,142	0,017	0,061	0,019
Strategist	0,122	-0,031	-0,088	-0,061	-0,105	0,050	-0,040
Evaluation Types	0,096	-0,005	-0,122	-0,109	0,005	-0,082	-0,044
Practitioner Knowledge	0,162	0,012	-0,310	-0,012	0,048	-0,021	-0,058
Education	0,016	0,106	-0,194	-0,191	-0,226	-0,130	-0,163

Guideline values:

-0.1, small, no practical significant relationship

-0.3, medium, practical visible relationship

-0.5, large, practical significant relationship

Unfortunately, Table 5.33 does little more than show that across PR practice, and across PR practitioner roles, practitioners are facing the same challenges. The absence of any practically significant relationships among these concepts is as disappointing as they are alarming. If Table 5.33 had shown that under certain practical conditions, or in certain roles, practitioners faced more or less specific challenges, it could be addressed and a general indication could have been determined for the direction in which practitioners should move in order to face fewer challenges. However, no such correlations exist to provide practical recommendations or guidelines to overcome challenges. Again, then, the descriptive component of this study is more useful to provide insight into the challenges practitioners face and how they may overcome these challenges to ultimately enhance their measurement and evaluation. As such, it is again then noted that a practice-shift must take place from focusing on technical tasks and technical outputs, to a strategically integrated communications function.

5.4.1.7 Correlations with Strategic Access

The construct pertaining to practitioners' strategic access was analysed to determine the influence of practitioners' reporting on insights and strategic alignment on this practice. The theoretical argument behind this analysis, made in Section 2.3, is that stronger strategic access would enable stronger strategic alignment. Plainly, if practitioners could access and so know what the organisation's strategic imperatives are, they could better align their PR function to help the organisation achieve the desired strategic results. Inversely, if they did not know what the strategic imperatives are, it would be near impossible for them to align their PR function with that. Ultimately,

this alignment would enable or disable them to report on insights, showing how the PR function was able to contribute to strategic imperatives. Table 5.34 below summarises these results:

Table 5.34 Correlations with Strategic Access (r_s)

	Information Access	Decision-making	Strategic Access
Reporting on Insights	0,289	0,445	0,464
Strategic Alignment	0,176	0,170	0,239

Guideline values:

~0.1, small, no practical significant relationship

~0.3, medium, practical visible relationship

~0.5, large, practical significant relationship

Table 5.34 shows that the level of strategic access indicated by respondents shows a strong correlation ($r_s=.464$) with their indication of reporting on insights, but no significant relationship is seen between strategic access and strategic alignment. One explanation for the lack of relationship found could come from the descriptive discussion in the first part of this chapter, where it was seen that practitioners' strategic access is limited only to what is directly relevant to their media liaison/publicity-oriented practice. However, the significant relationship seen among reporting on insights and strategic access is encouraging, as it confirms the theoretical ideal that knowing strategic imperatives allows for reporting on how the PR function contributed to it.

The construct of reporting on insights showed a strong correlation ($r_s=.554$) with the concept of decision-making, positively indicating a relationship between the practitioner that reports on insights and the practitioner who is included in their organisation/clients' strategic decision-making processes. Theoretically, reporting on insights may thus pave the way to the coveted "seat at the table" for PR practitioners, if they can bring about strategic alignment in their execution of PR activities first.

5.4.1.8 Correlations with Evaluation Types

This test was conducted to determine the extent to which there is any correlation between the evaluation types employed by practitioners (formative, summative, process, quantitative, qualitative) and their indications of reporting on insights, their measurement maturity, and practitioner knowledge. The theoretical assumption behind this test (see Section 3.3.4) is that practitioners that strongly employ the different evaluation types will be enabled to report on insights and more likely to report on outcomes, rather than outputs, as their measurement maturity increases. It is also likely that practitioners with stronger knowledge of different research methods will be more likely to utilise these skills and apply quantitative and qualitative research to enhance their PR measurement and evaluation. This argument was captured in the eighth Theoretical Statement (see Section 3.3.4). Table 5.35 below summarises the results of this test:

Table 5.35 Correlations with Evaluation Types (r_s)

	Formative Evaluation	Process Evaluation	Summative Evaluation	Quantitative Evaluation	Qualitative Evaluation	Evaluation Types
Reporting on Insights	0,725	0,620	0,622	0,323	0,393	0,770
Measurement Maturity	0,530	0,436	0,547	0,404	0,601	0,698
Practitioner Knowledge	0,401	0,280	0,470	0,252	0,355	0,501

Guideline values:

~0.1, small, no practical significant relationship

~0.3, medium, practical visible relationship

~0.5, large, practical significant relationship

Table 5.35 confirms the theoretical assumptions made with strong correlations seen in terms of evaluation types and the dependent constructs. As such, a practically significant correlation of $r_s=.770$ is seen between evaluation types and reporting on insights, while a practically significant correlation of $r_s=.689$ is seen with measurement maturity and one of $r_s=.501$ with practitioner knowledge. Practically significant correlations are seen with the three dependent constructs and most concepts of evaluation types, the exceptions being medium correlations found with reporting on insights and both quantitative evaluation and qualitative evaluation and practitioner knowledge and qualitative evaluation. Furthermore, there were only conversely medium correlations seen among practitioner knowledge and process evaluation and quantitative evaluation.

These results are important in that they produced the following insights:

- Conducting different evaluation types holds a strong relation to the practitioner's ultimate reporting on insights.
- Conducting different evaluation types holds a strong relation to the practitioner's measurement maturity.
- Conducting qualitative evaluation has the strongest impact on measurement maturity.
Conducting formative evaluation has the strongest impact on reporting on insights.

Drilling down into more detail for evaluation types, the specific types of evaluation (formative, process, summative) were theoretically linked to several practice-related factors (see Section 3.3.4). Firstly, formative evaluation, in theory, enables practitioners to set measurable goals and is facilitated through strategic access (see Section 2.3). These concepts and constructs were tested to determine if these practice-related factors could be seen to correlate with formative evaluation, as set out in Table 5.36. Second, the theoretical assumption was made that process evaluation will be linked to higher measurement maturity, and thirdly, that summative evaluation will enable, and should be linked to, reporting on insights. The results of these analyses are set out below in Table 5.36:

Table 5.36 Correlations with Formative, Process, and Summative Evaluation (r_s)

	Formative Evaluation	Process Evaluation	Summative Evaluation
Measurable Goals	0,401		
Strategic Access	0,297		
Measurement Maturity		0,367	
Reporting on Insights			0,622

Guideline values:

~0.1, small, no practical significant relationship

~0.3, medium, practical visible relationship

~0.5, large, practical significant relationship

This analysis shows a correlation between respondents' indication of setting measurable goals and conducting formative evaluation ($r_s=.401$), but only a medium correlation with strategic access ($r_s=.297$). Process evaluation showed a medium correlation ($r_s=.367$) with measurement maturity. Summative evaluation is then seen to correlate strongly ($r_s=.622$) with respondents' tendency to report on insights. Summative evaluation, the act of evaluating program success and determining the impact thereof on the organisation, is a natural enabler of reporting on insights among this study's respondents – as the correlation seen here confirms.

5.4.1.9 Correlations with Measurement Maturity

The construct measurement maturity contained three concepts pertaining to measuring at output, uptake, and outcome levels. This construct, and the contained concepts, were analysed to determine practically significant relationships among respondents' use of AVEs and multipliers and the practitioner role they fulfil. The aim of these analyses was to determine whether practitioner role influenced their measurement maturity, and whether measurement maturity related to certain metrics. Theoretically, it was posed that AVEs is an unreliable output-level metric and its use might suggest low measurement maturity in general and this study's interviews echoed this sentiment to a larger extent. The theoretical argument around measurement maturity was stated in Theoretical Statement 9 and held that reliable and valid measurement must take place at different levels for different results, and that social media should (in accordance with the Barcelona Principles) be measured consistently with other media metrics. From the discussion in the first major section of this chapter, however, it is seen that few agencies provide social media services as part of their media relations – a fact that may skew this construct's analysis entirely. The results are indicated in Table 5.37 below:

Table 5.37 Correlations with Measurement Maturity (r_s)

	Outcomes	Outtakes	Outputs	Measurement Maturity
Social Media	0,093	0,294	0,550	0,377
AVE	0,144	0,237	0,298	0,301
Strategist	0,172	0,029	0,244	0,148
Technician	0,032	0,035	0,213	0,114
Manager	0,037	-0,004	0,325	0,112

Guideline values:

~0.1, small, no practical significant relationship

~0.3, medium, practical visible relationship

~0.5, large, practical significant relationship

From Table 5.37 it is seen that a medium correlation ($r_s=.377$) is found between respondents' measurement of social media and their overall measurement maturity, indicating that practitioners who display higher levels of measurement maturity may be likely to measure social media with other media metrics, as suggested by the Barcelona Principles. However, a medium correlation ($r_s=.301$) is also seen between measurement maturity and the use of AVEs. This correlation breaks down to the point of no significant relationship when looking specifically at practitioners that measure at outcome level, compared to practitioners that measure at output level where there is a medium correlation, suggesting that more strategic practice implies lower use of AVEs. As with other analyses, it was seen here again that practitioner role had little bearing on measurement maturity among respondents as no practically significant relationships were found. Once more, interview information provides possible nuance to this observation as it was found among participants that measurement maturity overall was lacking due to the nature of practice.

5.4.1.10 Correlations with the Barcelona Principles

As Chapters 3 and 4 detailed, the quantitative constructs used in this study's empirical component were identified from the Barcelona Principles and expanded/explained through theoretical PR best practice concepts identified throughout the literature review of this study. The different practice-related constructs were tested for correlations with the Barcelona Principles to determine which of these factors could be seen to impact respondents' indications of the Barcelona Principles in terms of awareness and implementation. However, it is worth mentioning already that the awareness and implementation of the Barcelona Principles were seen from descriptive statistics already to be so low, that there is little hope to believe that it would produce significant correlations with incompatible practice that was seen to be prevalent. If this notion is to be traced back to the first chapter of this study, it was therein and in the literature chapters that followed already held that South African PR practice differs from global practice and therefore it becomes more difficult to implement the Barcelona Principles.

This analyses, the results of which are reported in Table 5.38 below, could then for creating a profile of characteristics that can be expected from the South African PR practitioner who is aware of, and implementing, the Barcelona Principles.

Table 5.38 Correlations with the Barcelona Principles (r_s)

	Formal Process	Awareness	Implementation	Barcelona Principles
Practitioner Role	0,091	0,082	-0,035	0,064
Technician	-0,082	-0,094	-0,086	-0,100
Manager	0,128	0,157	-0,050	0,108
Strategist	0,173	0,082	-0,001	0,091
Strategic Alignment	0,386	0,320	0,313	0,411
Strategic Access	0,239	0,062	0,046	0,128
Reporting on Insights	0,295	0,295	0,239	0,340
Practitioner Knowledge	0,142	0,259	0,103	0,206
Evaluation Types	0,269	0,304	0,270	0,348
Formative Evaluation	0,244	0,287	0,239	0,322
Process Evaluation	0,332	0,345	0,261	0,394
Summative Evaluation	0,246	0,224	0,210	0,276
Measurement Maturity	0,293	0,249	0,252	0,326
Outcomes	0,081	0,124	0,106	0,137
Outtakes	0,189	0,197	0,211	0,243
Outputs	0,528	0,259	0,245	0,409
Relationships	0,218	0,107	0,175	0,186
Stakeholder Relationship Building	0,197	-0,035	-0,023	0,028
Stakeholder Reporting	0,198	0,139	0,229	0,219
Challenges	-0,150	-0,055	-0,043	-0,107
Financial	-0,131	0,064	-0,034	-0,032
Time	-0,072	0,044	0,100	0,034
Knowledge	-0,141	0,009	0,067	-0,021
Value	-0,006	-0,227	-0,105	-0,166
Understanding/Interest	0,016	0,030	0,007	0,010
Standardisation	-0,118	-0,035	-0,124	-0,121
Practitioner Demographics				
PR Team Size	0,083	0,189	0,170	0,182
Age	-0,033	0,138	0,110	0,107
Experience	0,017	0,221	0,182	0,196
Education	-0,276	0,040	0,020	-0,062

Guideline values:

-0.1, small, no practical significant relationship

-0.3, medium, practical visible relationship

-0.5, large, practical significant relationship

From Table 5.38 it is seen that there is, in fact, very little significant relationships between practice-related constructs and the Barcelona Principles as a construct. Because the practice-related constructs were derived and developed from the Barcelona Principles and descriptive statistics showed the practice to be misaligned with what the Barcelona Principles intend to uphold, this comes as little surprise. A strong correlation ($r_s=.528$ with specifically formal evaluation - and $r_s=.409$ with the Barcelona Principles) is seen among output metrics and the Barcelona Principles, which could

simply be attributed to the fact that output level metrics were simply utilised by all respondents. Naturally, also those that are aware of and implement the Barcelona Principles. While almost no statistically significant relationships were found between the Barcelona Principles and practice-related constructs, some medium correlations were seen and are worth commenting on. Of these medium correlations, the strongest is found among the Barcelona Principles and the concepts contained therein (formal measurement, awareness, and implementation) and strategic alignment ($r_s=.411$). This gives an indication that where strategic alignment is present in practice, the Barcelona Principles is more feasible and vice versa. Medium correlations were then also seen among the Barcelona Principles and reporting on insights ($r_s=.340$) indicating that where the Barcelona Principles are prevalent, so is the practitioner's ability and proclivity to report on insights that aids systemic viability, an argument made with Theoretical Statement 1. Lastly, medium correlations were then also seen among evaluation types ($r_s=.348$) and measurement maturity ($r_s=.326$). These two constructs of practice are thus considered to be the primary indicators of the Barcelona Principles as far as measurement and evaluation goes, while strategic alignment and reporting on insights are the only practice-related constructs with a practical effect on the Barcelona Principles' uptake among this study's respondents. Lastly, from Table 5.38 it is notable that there is a practically insignificant but still inverse correlation seen between the Barcelona Principles and the practitioner role of technician.

A single sample t-test was next conducted to determine the difference between the Barcelona Principles as construct and the demographics relating to practitioner gender, the two most prevalent types of PR practice, and the two most prevalent reporting lines of PR practitioners that were seen among respondents. These tests were conducted only on the two most prominent answers indicated by participants for each construct, because these answers constituted over 90% of the population (whereas testing the minority answers would have produced no notable or valid results). The results of the independent t-tests are reported in Table 5.39:

Table 5.39 T-test results of Demographics and Barcelona Principles

Type of PR Practice						
		N	Mean	Std. Deviation	Std. Error Mean	Effect size
Formal Process	Inhouse	31	3,32	1,194	0,214	0,45
	Agency	64	3,86	1,082	0,135	
Awareness	Inhouse	31	2,23	1,454	0,261	0,60
	Agency	64	3,16	1,556	0,194	
Implementation	Inhouse	31	1,97	1,251	0,225	0,47
	Agency	64	2,63	1,386	0,173	
Barcelona Principles	Inhouse	31	2,5054	1,02151	0,18347	0,65
	Agency	64	3,2135	1,09410	0,13676	
Reporting Line						
Formal Process	CEO/President/MD	69	3,61	1,127	0,136	0,27
	Marketing	24	3,92	1,060	0,216	
Awareness	CEO/President/MD	69	2,58	1,519	0,183	0,77
	Marketing	24	3,75	1,422	0,290	
Implementation	CEO/President/MD	69	2,26	1,347	0,162	0,36
	Marketing	24	2,75	1,327	0,271	
Barcelona Principles	CEO/President/MD	69	2,8164	1,09146	0,13140	0,60
	Marketing	24	3,4722	0,97265	0,19854	
Gender						
Formal Process	Female	72	3,76	1,107	0,130	0,35
	Male	31	3,32	1,249	0,224	
Awareness	Female	72	3,07	1,559	0,184	0,35
	Male	31	2,52	1,546	0,278	
Implementation	Female	72	2,38	1,326	0,156	0,10
	Male	31	2,52	1,387	0,249	
Barcelona Principles	Female	72	3,0694	1,04205	0,12281	0,24
	Male	31	2,7849	1,16920	0,20999	

Guideline values:

≈ 0.2 Small, no practically significant difference

≈ 0.5 Medium, practically visible difference

≈ 0.8 Large, practically significant difference

The t-tests conducted for the type of practice and reporting lines of PR practitioners, as well as the gender of the practitioner showed medium effect sizes for most concepts of the Barcelona Principles that were measured. There were little significant relationships between these groups. The most notable observation from Table 5.39 is the difference seen in practitioners' awareness of the Barcelona Principles and their reporting line to the CEO/President/Managing Director (M=2,58, SD=1,519) and to Marketing (M=3,75, SD=1,422) with a large effect size ($d=0,77$). Thus, demographic characteristics (type of practice, reporting line, gender) tested with t-tests showed very little practically significant difference for practitioners' overall utilisation of the Barcelona Principles and can be mostly disregarded when conceptualising normative guidelines for implementing the Barcelona Principles.

The conclusion of this chapter's second major section allows for answering the fourth and last specific research question - *what factors and challenges influence South African PR practitioners' adoption of standardised measurement and evaluation practices?*

A trend of lacking statistically significant results necessitates that this question is answered using not only comparative analyses, but that the context drawn from qualitative information and descriptive statistics (and the discrepancies found therein) can also prove to be useful. As such, the answer to this question is believed to be that current practice lacks the maturity required to implement the Barcelona Principles in the South African PR landscape and a contributing factor is the low awareness of the Barcelona Principles. Within this context of low awareness of the Barcelona Principles and practitioners almost consistently believing that their practice is more strategic than that which is theoretically described as the PR best practice ideal, it would naturally be almost impossible to implement the Barcelona Principles. In practice, then, stronger strategic practice would lead to stronger measurement and evaluation which would only then create an environment within which the Barcelona Principles can be effectively implemented.

5.5 Conclusion

This chapter presented and discussed the results of the study as relevant to the general research objective, which is to propose *how the Barcelona Principles can best be implemented in the South African PR practice*. It addressed two specific research objectives – determining how South African PR practitioners measure and evaluate their PR efforts and report to management thereon, and determining what factors and challenges influence South African PR practitioners' adoption of standardised measurement and evaluation practices.

As it was determined through the theoretical discussion of this study that it is first necessary to establish the current PR practices and to what extent they align with the core theoretical constructs that relate to the Barcelona Principles, this chapter started off by investigating into current PR practices, then into measurement and evaluation practice, then into how these factors all impacted and correlated with others. The simplified conclusion is that PR practice among this study's participants tends to be immature, which in turn results in immature measurement and evaluation practices, which in turn creates an inhospitable environment to implement standardisation of measurement and evaluation according to global standards. It appears that in order to remedy this, a two-pronged approach would be required: first, a practical approach that elevates PR practice to realise a more strategic function and second, an educational drive to promote awareness and

understanding of the Barcelona Principles. This should not necessarily be a linear process – elevating practice may cause practitioners to be more receptive of the Barcelona Principles, while increased awareness of the Barcelona Principles may prompt practitioners to question and adjust their value propositions. This may be especially viable as it was seen from interviews that many practitioners acknowledge their need for a more rigorous value proposition and measurement and evaluation. Nurturing an understanding of the Barcelona Principles may provide them with the necessary context to understand how they can adjust their own practices to reach this ideal.

Granted, it is disappointing that the results reported in this chapter did not point toward more concrete areas of optimisation which could simply be unpacked to provide a solution for ultimately implementing the Barcelona Principles in South African PR context. However, it is at least coherent with the core assumption of this study, which was that the Barcelona Principles are difficult to implement in the unique South African PR context. This chapter's results, then, served to point out why it is difficult and where the discussion towards a solution should begin. The following final chapter of this study will serve to provide this discussion and aim to provide an answer to the study's general research question: *What normative guidelines can be set for implementing the Barcelona Principles in the unique South African PR context?*

CHAPTER 6. DISCUSSION AND RECOMMENDATIONS

6.1 Introduction

This final chapter sets out to provide a conclusion and recommendations based on the theoretical and empirical inquiries of this study. Chapters 2 and 3 investigated the theoretical components of PR practice and measurement and evaluation, Chapter 4 outlined the methodological approach to the empirical component of the study, and Chapter 5 reported the results of the empirical inquiry. Throughout these chapters, tentative answers to the specific research questions addressed by each section were offered. This chapter serves to draw these findings together and offer a practical answer to the general research question posed in Chapter 1 as follows:

General Research Question:

What normative guidelines can be set for implementing the Barcelona Principles in the unique South African PR context?

In order to frame the context of this question, it was stated in Chapter 1 that one of the largest current debates in PR literature is the measurement and evaluation of PR efforts to determine how the value of the PR function can be proven. Over the past 50 years, the foremost researchers in the field concluded that the value of PR lies in its contribution to organisational excellence, i.e. PR helps organisations to reach its goals. The question remained, throughout the years, how this agreed-upon value can be proven. In an attempt to address this question, many models for PR measurement and evaluation have been proposed with the ultimate goal of standardising measurement and evaluation in the industry. The Barcelona Principles offered one of the most prominent shifts toward global standardisation when it was first published in 2010. However, a host of research inquiries have shown South African PR practice to defy global norms and therefore the Barcelona Principles may not be feasible for implementation in the unique South African PR context without a degree of localisation. Against this backdrop, this chapter aims to synthesise the study's findings and provide an answer to the general research question as stated above.

This chapter is structured to first provide a review of the conceptual framing of this study, briefly reiterating the paradigmatic framing that was set throughout the literature reviews. It then consolidates the results from the empirical component of the study to pose a practical answer to the general research question, after which the study's contribution, recommendations for future research, and limitations are discussed.

6.2 Conceptual framing of study

Chapter 2 was dedicated to investigating the components that make up PR best practice which would ultimately lead to realising PR's value. It provided a detailed discussion of the paradigms and theories framing the elements of PR practice that enable PR measurement and evaluation. These paradigms created the context within which PR measurement and evaluation must take place if it is to prove the value of the PR function. Chapter 3 provided a nuanced discussion against this backdrop that explored the details of PR measurement and evaluation and the standardisation thereof. Table 6.1 below provides the paradigms and theories that made up the study's conceptual framing:

Table 6.1 Conceptual framing of study

Reflective paradigm	
Meta-theoretical tradition	Cybernetics
Guiding theories	Systems theory, Viable Systems model
Functional paradigm	
Guiding theories	Strategic management, strategic communication management, roles theory, two-way symmetrical communication
Relational paradigm	
Guiding theories	Stakeholder theory, excellence theory, relationship management theory

This study's conceptual framing aimed to answer the first and second specific research questions posed in Section 1.3 as follows:

1. *What role does PR measurement and evaluation play in PR best practice, according to established theory?*
2. *How is PR measurement and evaluation standardised in current established theory and practice?*

The discussion will next provide a brief overview of each theoretical paradigm and the theories presented in each, with reference to the arguments presented and the theoretical statements extracted from each theoretical discussion. Each of these paradigms shaped the theoretical expectations for PR best practice, but it also focused on how these practices should theoretically be measured and evaluated in order to determine the role of PR measurement and evaluation in PR best practice.

6.2.1 Paradigmatic framing

6.2.1.1 The Reflective Paradigm

The reflective paradigm used for this study rests on the foundation of the cybernetic meta-theoretical tradition (see Section 2.2). This view allowed for viewing organisations and business functions such as PR as part of a system and owning all the qualities ascribed to systems in this paradigm. Specific to PR's function in the organisational system, it was argued that PR fulfils an important role in bringing about systemic viability. However, this paradigm set certain preconditions that would enable PR to fulfil this function – the open organisational system, and PR's reflective task of then feeding environmental information into the system and vice versa (see Section 2.2.2). This referenced PR's necessity to inform strategic decision-making through this reflective process and culminated in the first theoretical statement:

***Theoretical statement 1:** The PR function contributes to systemic viability in helping organisations reach business goals when PR practitioners inform strategic decision-making processes.*

Informing this paradigmatic discussion was the systems theory, describing the nature of interaction between the system and its environment. It was argued here that organisations needed to function as open systems to allow for communication to flow between parts of the system and its environment and it would ultimately be the responsibility of the PR function to facilitate these transactions (see Section 2.2.1). Next, the discussion focused on the Viable Systems model as it was conceptualised by Beer (1984) and illustrated by Brocklesby and Cummings (1996) which illustrated how the transactional flow of information ultimately leads to systemic viability – the system's longevity and ability to remain stable during constant environmental and internal changes (see Figure 2.2).

6.2.1.2 The Functional Paradigm

The functional paradigm provided a practical lens, looking at how PR would be conducted within the frame of the reflective paradigm. It outlined the strategic management of communication if PR is to fulfil its reflective function and described the practices and prerequisites that are expected for PR best practice (see Section 2.3). This discussion drew from theories on strategic management, strategic communication management, roles theory, and two-way symmetrical communication and it was in these theories where it was first seen where South African PR practice deviates from theoretical norms. This discussion culminated in the following theoretical statements (see Section 2.3):

Theoretical Statement 2: *In order to contribute to organisational success through strategic communication management, strategic alignment must take place:*

- *Primary alignment between the goals of the organisation and the goals of the PR function must take place at grand strategy level.*
- *Secondary alignment between the goals of the PR function and the activities conducted by the PR function must take place at business/specialty level.*

Theoretical statement 3: *The PR practitioner must fulfil a strategic role as part of the dominant coalition (or reporting directly to the dominant coalition) in order to access strategic information and influence strategic decisions.*

Theoretical statement 4: *Organisations must adopt a symmetrical worldview that supports innovation through collaboration, and allows for a participatory approach that enables dialogue with stakeholders.*

Throughout this discussion, it was argued that PR must, theoretically, be strategically managed and aligned with the organisation's goals, and (importantly) it must be symmetrically practiced to bring about the value of the PR function. Three prerequisites were set in this discussion that would enable strategic communication management: the role of the PR practitioner, the organisation's worldview, and the communication model employed (see Section 2.3.3).

The guiding theories of this paradigm provided insights into the expected role of the PR practitioner and it was seen that the PR practitioner as strategist would be able to best bring about the strategic value of the PR function (see Section 2.3.3.1). However, this provided a practical discrepancy as South African PR practitioners seldom fulfil one traditional role, and even fulfil niche roles not found in mainstream literature (Van Heerden, 2004; Meintjes *et al.*, 2009; Steyn & Everett, 2009; Tindall & Holtzhausen, 2011). The next conflicting point was seen upon discussing the organisational worldview that is required for strategic communication management – while the theoretical ideal stipulates a symmetric worldview, it was found that local practice rather uses a situational approach which is determined by the specific situation at hand and as such, South African PR practitioners often switch between asymmetric and symmetric approaches (Tindall *et al.*, 2003; Tindall & Holtzhausen, 2011). Lastly, these prerequisites stated that a two-way communication model must be employed in practice (within a symmetrical worldview) but, because of the situational approach adopted by South African practitioners, local practice is often adjusted to a more specialised application, using different communication model's elements as they are required. It was noted, here, that this practical approach is reminiscent of Van Ruler's (2004) Communication Grid for strategic

communication management, but while useful for practice the grid offered little insight into measurement and evaluation thereof. At the end of this discussion it was concluded that the deviations in practice from global norms led to a vastly more complex environment in which to try and standardise PR measurement and evaluation.

From this paradigm the focus was shifted towards the last theoretical paradigm which drew the focus (to some extent) away from the practice of PR and more towards the value of PR as the relational paradigm was next explored.

6.2.1.3 The Relational Paradigm

The relational paradigm held that, theoretically, strategic communication management described in the functional paradigm should and would lead to strong organisation-stakeholder relationships and that PR's value is, to a larger extent, embedded in or realised through these relationships (see Section 2.4). Naturally, the guiding theories in this paradigm were presented as the stakeholder theory, the excellence theory, and the relationship management theory.

From this theoretical framing the following theoretical statement was derived:

Theoretical statement 5: The PR function must establish strong organisation-stakeholder relationships in order to benefit from its outcomes and report on how it contributes to organisational excellence.

The theoretical framing allowed for setting the relational value of PR and described the outcomes expected from these relationships and how it aids PR in contributing to reaching organisational goals. This paradigm thus stipulated the theoretical guidelines for stakeholder engagement through stakeholder theory (see Section 2.4.1), how stakeholder relationships encompass the value of PR through the excellence theory (see Section 2.4.2), and how these relationships are then sustainably managed through the relationship management theory (see Section 2.4.3). If these theoretical principles are accepted, the natural question that this study's focus requires one to ask is, how would these relationships and the value it pose be measured and evaluated, and reported on? It was determined that measuring relationships and its outcomes require long-term summative assessments, and that quantitative reporting without interpretation of relationship outcomes would hold little to no value to top management in charge of strategic decision-making (see Section 2.4.4). However, at the end of this discussion it was also stated that reporting on relationships constitutes one dimension of PR reporting and that it cannot stand alone to prove the holistic value of the PR function.

Chapter 2 concluded the initial paradigmatic framing of this study and summarised the role of PR measurement and evaluation in PR best practice. The theoretical statements presented throughout this discussion were later matched with the components of PR measurement and evaluation and the Barcelona Principles in order to establish the constructs that were used for empirical investigation.

Chapter 3 contained the evaluation paradigm and the measurement paradigm, building on the foundation set in Chapter 2 to discuss the details around actual measurement and evaluation practices. The distinction was here made between evaluation to prove *value*, and measurement to prove *effectiveness*.

6.2.1.4 The Evaluation Paradigm

The study's theoretical inquiry used the backdrop of PR best practice and the role of measurement and evaluation in this context to focus on PR measurement and evaluation. The purpose of this discussion was to satisfy the second specific research objective – to determine how PR measurement and evaluation is standardised in current established theory and practice. This theoretical discussion, provided in Chapter 3, created the context of PR measurement and evaluation by first providing an overview of the historical developments that led up to this point of time in practice (see Section 3.2). It then inquired into global barriers to measurement and evaluation and the most prominent challenges to PR measurement and evaluation faced by practitioners were isolated for further empirical investigation in the South African context (see Section 3.2.1). From this introductory discussion already, the following theoretical statement was posited:

Theoretical statement 6: *Practitioners consistently face financial, time, knowledge, value, interest/understanding, and standardisation as barriers to conducting measurement and evaluation. The wide range of measurement and evaluation practices required to prove value necessitates that the PR practitioner is able to conduct rigorous research:*

- *The PR practitioner must be educated/trained to conduct qualitative and quantitative research.*
- *The PR practitioner must be familiar with research best practice in order to produce reliable and valid research results across a broad spectrum of activities and platforms.*
- *Practitioner education/knowledge can help practitioners overcome the most common challenges.*

The evaluation paradigm rested on the foundational assumptions of the reflective, functional, and relational paradigms (see Section 3.3). It posited that PR evaluation will, in this context, determine the extent to which the PR function can act as a strategic intelligence function as part of the dominant coalition and prove the value of the PR function.

The evaluation paradigm was seen to overlap with the reflective paradigm where the cybernetic Viable Systems model's control functions were translated to PR measurement and evaluation in practice (see Table 3.3). It was argued that an evaluation framework that displays these control systems would provide a structured approach to standardisation. It was later illustrated that the Barcelona Principles, as benchmark for standardisation, accommodated almost all control functions of the Viable Systems model (see Table 3.7).

The evaluation paradigm finally turned to a more practical application of the theory, where the different types of evaluation were discussed (see Section 3.3.4). It was held that, theoretically, evaluation would encompass different types of evaluation at different points of practice and this discussion led to the following theoretical statements:

Theoretical Statement 7: *To ensure strategic alignment, measurable goals and objectives must be set at the start of the strategic communication management process to enable evaluation for proving value.*

Theoretical statement 8: *Different evaluation types must be employed throughout the evaluation process to prove value:*

- *Formative evaluation is necessary to inform PR goal setting and to set benchmarks for comparison during process reporting and for later comparisons.*
- *Process evaluation is necessary to conduct ongoing monitoring of PR efforts throughout the lifespan of PR programmes, tested consistently against benchmarks set through formative evaluation.*
- *Summative evaluation is necessary to prove that the objectives and goals of PR programmes were met after completing a PR programme, and must be used to report insights at strategic level.*
- *A combination of qualitative and quantitative research methods must be used to undertake formative, process, and summative evaluation and to determine and report on changes in outcomes.*

These theoretical statements again provided several concepts for empirical inquiry and were later matched against the Barcelona Principles and translated to constructs and concepts to be investigated (see Table 3.8).

The foundational theoretical assumptions that discussed PR practice as the reflective, functional, and relational paradigms produced a coherent framework for discussing PR evaluation in order to establish a conceptual link between PR practice and the evaluation thereof. The interconnectedness of practice and evaluation, each enabling the other, was seen throughout these discussions. From the evaluation paradigm, a key takeaway was its ability to prove value created by PR practice. After establishing the expectations for determining the value of PR in the evaluation paradigm, and to what extent these are standardised in current established theory and practice, the measurement paradigm for proving the effectiveness of the PR function followed to create an understanding of how measurement would be conducted in order to inform evaluation.

6.2.1.5 The Measurement Paradigm

The measurement paradigm was probably the most practical discussion throughout this study's theoretical inquiry. It focused on describing the metrics and models that exist in current established theory and practice (see Section 3.4).

This paradigmatic description eventually offered a description of measurement maturity – at what different levels the different measurement metrics could and should be utilised to reliably inform value. This is also probably the framework of PR measurement and evaluation where there are the most contentious discussions and practices (see Section 3.4.1). Examples include the persistence of AVEs in practice, despite its lack of credibility, as well as the utilisation of multipliers, ROI metrics, and the prevalence of output level metrics that are generally inherently void of meaning and lack consistency in terms of terminology and application. Herein it was highlighted that globally discredited metrics such as AVEs are found to be exceptionally prevalent across Africa still (see Section 3.4.1.1). It was also seen that South African practitioners are struggling to reliably report ROI figures (see Section 3.4.1.2).

Ultimately it was determined that measurement needs to take place at output, outcome, and outcome levels to inform evaluation. Furthermore, this discussion showed that current models are lacking practical effect and offered little help towards reaching the goal of this study (see Section 3.5). From this discussion, the following theoretical statement was drawn:

Theoretical statement 9: *AVEs and multipliers, as well as the injudicious use of ROI, are definitively discredited metrics that have to be eliminated from practice. Reliable and valid measurement metrics must be employed at all measurement levels:*

- *Metrics must set benchmarks for future assessments and successful activities at outcome, outtake, and output levels in order to determine effectiveness of activities and true change in outcomes.*
- *Social media outcome metrics must be used consistently with other media metrics.*

In this theoretical statement the core components of measurement were addressed and this allowed for its reduction to measurable constructs later in the empirical component of the study. The complete discussion of the measurement paradigm led the discussion into the actual current standardisation of PR measurement and evaluation in the form of the Barcelona Principles.

6.2.1.6 The Barcelona Principles

The Barcelona Principles presents a paradigm for discussion of its own, as these seven principles represent the current practical embodiment of standardisation in PR measurement and evaluation. Providing not an ideal, not a model, and not a theory, the Barcelona Principles put forth *guidelines* to nudge practitioners towards more unified and globally standardised forms of PR measurement and evaluation. The Barcelona Principles is discussed in detail in Section 3.6, and so it's important to here show how the Barcelona Principles coincides, supports, or lacks integration with established theory and practice.

Ultimately, the Barcelona Principles were viewed as a unifying framework that contained and accommodated the theoretical prescriptions of the reflective, functional, and relational paradigms. Furthermore, it was possible to reconcile the Barcelona Principles 2.0, its current form, with the evaluation and measurement paradigms as was shown in Table 3.8 in Section 3.6.2.

The following theoretical statement emerged from this discussion:

Theoretical statement 10: *In order to advance the field of standardised PR measurement and evaluation, PR practitioners must:*

- *Have a formal evaluation process in place.*
- *Be aware of the Barcelona Principles and its prescripts.*
- *Implement the Barcelona Principles in practice according to its prescripts.*

This paradigm concluded with discussing the suitability of the Barcelona Principles for application in the unique South African PR context (see Section 3.6.4). Considering that these principles were developed on a global stage, informed by global practice norms, the discrepancy arises where South African PR context differs from global norms. As it was seen in earlier discussions, the South African practice does not adhere to global norms in terms of practitioner roles, the symmetrical/asymmetrical dichotomy for worldviews or communication models (see Section 2.3), use discredited metrics (see Section 3.4), and face global challenges (see Section 3.2). These factors are seen to be both foundational and practical. It can now be recognised that foundational differences in how PR is practised would not allow for eventual adherence to standardised measurement and evaluation.

From the onset of Chapter 2 a recurring matter arose: PR measurement and evaluation, and the standardisation thereof, cannot be investigated without also investigating the PR practices that will be measured and evaluated. To even begin to look at measurement and evaluation, the practices need to be determined and examined. This is because, in these practices, the theoretical ideals are encapsulated, the foundational assumptions are translated into effect, and the value of PR is created. The value of PR cannot be evaluated if it doesn't exist to begin with – that would lead to catastrophic lies and misrepresentations of PR's success. It would breed suspicion and build mistrust in the minds of executives, and they would be right to question the actual value of the PR function.

From this paradigmatic framing, then, the study emphasised inquiry into PR practices which would enable reliable and valid measurement and evaluation. These constructs were tied to the constructs found in the Barcelona Principles and an empirical inquiry was launched into investigating these overlapping constructs in a holistic way to provide an answer to the general research question posed by this study.

6.2.2 Synthesis and discussion of findings

The paradigmatic framing of this study offered several identifiable constructs that were investigated through empirical enquiry in this study. As discussed in Chapter 5, these results highlighted a discrepancy in what practitioners believe about their practice, and how it holds up to theoretical ideals. This discrepancy necessitates using PR practice in South Africa as a starting point, addressing the general tendencies found in the study's data and information and then attempting to reconcile these practices and beliefs with globalised norms for standardised measurement and evaluation in the form of the Barcelona Principles. This section will therefore synthesise the results in the context of the study's theoretical foundation, in order to answer the study's third and fourth specific research questions posed in Section 1.3 as follows:

3. *How do PR practitioners in South Africa measure and evaluate their PR efforts and report to management on programmes?*
4. *What factors and challenges influence South African PR practitioners' adoption of standardised measurement and evaluation practices?*

The synthesis of theory and findings that follows works towards answering the study's general research question, posed in Section 1.3.1 as follows:

What normative guidelines can be set for implementing the Barcelona Principles in the unique South African PR landscape?

From the results and analyses discussed in Chapter 5 it was seen that the descriptive statistics, interview information, and comparative analyses provided many contentious points where South African PR practice among this study's participants creates a unique PR environment as it deviates from basic theoretical precepts and global norms.

Where PR practice has, up to this point, been discussed apart from PR measurement and evaluation, this section will synthesise these landscapes. The rationale behind the synthesis is to highlight the inherently inseparable nature of practice and the measurement and evaluation thereof. As the general inclination of this study is particularly pragmatic, aiming to solve a practice-based problem, this approach in discussing the findings will lead into a similarly integrated proposed solution.

6.2.2.1 South African PR practice and measurement and evaluation

In order to create a holistic image of what the South African PR practice and measurement and evaluation landscape looks like among participants in this study, compared to the theoretical assumptions of this study, the implications of the study's findings relative to each theoretical statement will be discussed here.

This study's rooting in a cybernetic meta-theoretical tradition underscored the foundational theoretical principle that PR, in a reflective role, contributes to the cybernetic principle of systemic viability if it helps organisations reach their goals (see Section 2.2). What these organisational goals may and should be, is a discussion too large to fit into this study's scope. However, the foundation remains that PR practice brings about a systemic state of equilibrium as it balances the flow of information between systems and balances the organisation with its environment. The first theoretical statement held this assumption:

Theoretical statement 1

The PR function contributes to systemic viability in helping organisations reach organisational goals when PR practitioners inform strategic decision-making processes.

In Chapter 5 it was reported that, among this study's participants, the nature of their strategic access in order to bring about this viability was reported high but interpreted as limited to only the information required to fulfil their technical responsibilities. Furthermore, practitioners were undoubtedly esteemed trusted advisors with valued influence on decision-making, but again this was limited to a technical capacity (see Section 5.3.3.1).

This technical capacity to which the PR practitioner is seen to be confined holds an important and perhaps detrimental implication for the functional paradigm where strategic communication management manifests. The practitioner's capability to strategically align PR practices with the organisation's goals, vision, and mission, will be limited to the strategic information they receive. Without a deep and accurate understanding of the organisation's purpose in the ecosystem in which they are operating, practitioners are likely to be on the back foot when it comes to strategic practice and truly bringing about the flow of information and participate in strategic decision-making that is required from a cybernetic meta-theoretical tradition.

The implication of these findings for measurement and evaluation, and especially for the alignment thereof with the Barcelona Principles, forebodes trouble in the evaluation paradigm where the value of PR must be shown. The Barcelona Principles advocate for strategic access in stating how communications should have a clear intention of how it aims to affect audiences and change attitudes and behaviour, based on a clear understanding of the current context in which a communications programme is implemented (first principle, see Table 3.5). Inhibited strategic access of the PR function would essentially disable evaluation according to the value dimensions discussed in Section 3.3.5. Insofar as these value dimensions go (enabling operations, ensuring flexibility, building intangibles, and adjusting strategy), the level of strategic access among practitioners found in this study cannot accommodate value attribution, as practitioners are only privy to limited strategic information and therefore cannot reasonably be expected to facilitate and report on increasingly complex organisational ecosystems. Just the same, if the organisation or PR agency clients do not want nor expect PR to fulfil this role of bringing about systemic viability, the PR practitioner's chances of gaining strategic access would, in all likelihood, be dramatically reduced.

The second aspect of the PR function that bears reference here, is the capability to report on insights. Reporting on insights is a large part of the physical manifestation of PR's contribution to systemic viability. It is informed by evaluation and created by strategic communication management, and ultimately ties together evaluation and PR's reflective role. Quantitatively, this study found that several practices influenced practitioners' proclivity for reporting on insights (see Section 5.4.1.1) – these were most prominently different evaluation types, measurement maturity, strategic access, and the practitioner's role as strategist. ***Thus, if the practitioner is to create a PR function that serves to fulfil this core reflective role, it is crucial that they function as strategist, gain strategic access to organisational information that would enable holistic strategic alignment, then evaluate using different evaluation types maintaining a high level of measurement maturity to inform evaluation.***

The practice of PR's contribution to systemic viability (see Section 2.2.2), enacted through the process of strategic communication management in the functional paradigm (see Section 2.3), requires alignment at primary and secondary levels, as was captured in the second theoretical statement:

Theoretical Statement 2

In order to contribute to organisational success through strategic communication management, strategic alignment must take place:

- *Primary alignment between the goals of the organisation and the goals of the PR function must take place at grand strategy level.*
- *Secondary alignment between the goals of the PR function and the activities conducted by the PR function must take place at business/specialty level.*

The degree to which this process and practice of strategic alignment can manifest is ultimately determined by, or inhibited by, the level of strategic access practitioners have. The quantitative analyses reported in Section 5.4.1.2 showed a slightly higher than medium correlation between strategic alignment and strategic access among this study's respondents, indicating that there is at least a semblance of a relationship between these two practices for the study's participants. Qualitative information reported in this study's findings highlighted that strategic alignment becomes more difficult to achieve and less structured when strategic access is limited. In practice, it would be nearly impossible for the PR practitioner to bring about true strategic alignment if they are not positioned in the organisation to have access to strategic information and able to deconstruct the organisation's highest-level aspirations into executable PR programmes.

This process of strategic alignment is crucial to measurement and evaluation and is seen prominently in the Barcelona Principles. In the Barcelona Principles (see Table 3.5), the importance of strategic alignment is seen where it emphasises a holistic approach to measurement, including impact on organisational results (first principle); using metrics such as brand equity, advocacy, corporate reputation, or employee engagement (second principle); tailoring the outcomes to the objectives of the communication program (second principle); determining the effects of the quantity and quality of communication outputs on organisational metrics (third principle); undertaking evaluation in an integrated environment (third principle); understanding the value and implications of integrated marketing (third principle); setting clearly-defined goals and outcomes for social media (sixth principle).

The degree to which this strategic alignment takes place will also determine the metrics ultimately used to measure the success of the PR function, as is seen in the Barcelona Principles. If strategic alignment is limited to technical functionality, as was found to be true among this study's participants, it would lead to technical, output-level measurement. In this case, the potential for evaluation will be limited further, leaving practitioners in a position where they can satisfy the question of *effectiveness*, but not the question of *value*. As reported in Section 5.4.1.2, measurement maturity held the strongest correlation with strategic alignment and it appears that ***practitioners that practice strong strategic alignment may be better equipped to conduct outcome-level measurement.***

Strategic alignment also holds an important implication for the role of the practitioner, theoretically discussed as a prerequisite for strategic communication management. The most basic assumption of roles, in theory (see Section 2.3.3.1), is that the role of *strategist* functions as part of the dominant coalition and this role embodies the reflective and strategic function of the practitioner as it pertains to strategic access and thus, strategic alignment. This theoretical notion was reflected in the third theoretical statement:

Theoretical statement 3

The PR practitioner must fulfil a strategic role as part of the dominant coalition (or reporting directly to the dominant coalition) in order to access strategic information and influence strategic decisions.

In Section 5.4.1.2 it was reported that the role of strategist had a medium correlation with strategic access and the role of technician showed no detectable correlation with strategic access. Comparative analyses could furthermore only confirm a practically significant relationship between the practitioner role as strategist and reporting on insights as mentioned above, while there was no

detectable relationship with other constructs of strategic practice. Giving full acknowledgment to the fact that many specialised practitioner roles have evolved in recent years and from different paradigms (all holding practical value), reducing the theory of roles to its essence had served to indicate to what extent practitioners participating in this study fulfilled multiple roles. The study's findings on practitioner roles (see Section 5.3.3.3) confirmed that of Tindall and Holtzhausen (2011; see Section 2.3.3.1), that practitioners in South Africa fulfil multiple roles.

In terms of measurement and evaluation, fulfilling a technical role to a large extent can be expected to lead to technical measurements. In this case, however, where most practitioners fulfilled all roles there was no detectable relationship between measurement maturity and practitioner roles (Section 5.4.1.9). While the Barcelona Principles does not allude to the role of the practitioner in its implementation *per se*, it is implied in the expectations it sets for measurement and evaluation as a holistically integrated practice (see Section 3.6.2). This higher-level integrated function would not report on publication metrics, but would emphasise elements that are influencing the reflective cybernetic ecosystem – as the Barcelona Principles prescribe. From this study's findings, however, it is interesting to note that the practitioner role showed no practically significant correlation with the Barcelona Principles, yet there was a slight negative correlation among the Barcelona Principles and the role of technician (see Section 5.4.10), indicating that practitioners in a technical role may not be able to implement the Barcelona Principles, as was argued theoretically. Following this, it is concluded that ***the ability to satisfy the requirements of a reflective function that acts in alignment with organisational goals to contribute to systemic viability would be facilitated by a shift towards a more strategic role for practitioners. In this role, practitioners would be more equipped to measure their efforts at outcome-level and thus produce evaluation that reports on insights.***

Theoretically, a prerequisite of the strategic PR function that contributes to systemic viability described up to this point can only truly and sustainably be practised where a symmetric worldview is adopted by the organisation (see Section 2.3.3.2), where a participatory approach through stakeholder dialogue is encouraged and innovation is encouraged. This was stated with the fourth theoretical statement:

Theoretical statement 4

Organisations must adopt a symmetrical worldview that supports innovation through collaboration, and allows for a participatory approach that enables dialogue with stakeholders.

This study's findings reported a strong presence of a symmetric organisational worldview, in contrast to the findings of Tindall *et al.* (2003) that showed a situational approach in worldviews among South African PR practitioners. Furthermore, it could not confirm findings of the like of Michaelson *et al.* (2015) that found a symmetric worldview to be indicative of adopting standardised measurement and evaluation practices (see Section 2.3.3.2 and Section 3.3.2).

In the symmetric worldview, the importance of stakeholder relationships as a business imperative, and the measurement and evaluation thereof, becomes paramount. This can be read closely with the fifth theoretical statement originating in the relational paradigm (see Section 2.4) that argued that stakeholder relationships are an outflow of strategic communication management. These stakeholder relationships would ultimately hold several strong benefits that allow for PR's contribution to organisational excellence, as was stated in the fifth theoretical statement:

Theoretical statement 5

The PR function must establish strong organisation-stakeholder relationships in order to benefit from its outcomes and report on how it contributes to organisational excellence.

In theory, the symmetric worldview and the outflow of stakeholder relationships as a result of strategic communication management would appeal in practice to organisations' reflective role in their environment, operating sustainably, sustaining their licence to operate, maintaining accountability and a good reputation, and many other intangibles found in measurement and evaluation literature – particularly in the value dimensions of evaluation (Section 3.3.5). The interlinked nature of a symmetric worldview and stakeholder relationships were seen in comparative analyses reported in Section 5.4.1.4 where a practically significant correlation could be seen between these two constructs. This confirms that a symmetric worldview acts as a good breeding ground for building stakeholder relationships for the PR function.

Given this, it is strange that the element of stakeholder relationships received very little attention in qualitative inquiries. From these, it came forth that this element of PR practice was brushed aside, attributed to other business departments, or disregarded as it was not an expected outcome of the PR function. In cases where practitioners could explain the role and measurement of stakeholder relationships, the measurement and evaluation component was harder to articulate (see Section 5.3.3.5).

The implication of this practice-based evidence is a suppressant of evaluation. This was seen in practitioners' indications that they report on stakeholder relationships, using mainly output metrics for these reports (see Section 5.3.3.5). The evaluation of value dimensions that would be applicable to stakeholder relationships would be that of enabling operations, ensuring flexibility, and building intangibles, but few of these received mentions in qualitative information gathered among participants. Comparative analyses also showed relationships and a symmetric organisational worldview to be strong indicators of practitioners' reporting on insights, an act of contributing to systemic viability. However, despite a high quantitative indication of relationships as KPI of practitioners' roles, the articulation of the role stakeholder relationships played in PR practice and the measurement and evaluation thereof was fragmented and lacking among interviewed practitioners, and seldom formalised to any degree. The lack of formalisation points to a possible knowledge gap in the role stakeholder relationships play in achieving business outcomes through PR activities.

This finding is highly inconsistent with theory, as it was discussed in Section 2.3 that South African PR practitioners have been found to fulfil an exceptionally important reflective role in liaising with stakeholders. A logical explanation is that previous findings may be very much applicable to many PR practitioners in South Africa, but that there is a portion of practitioners for whom stakeholder relationships do not play a large role in their PR practice. Among this group, relationships may be regarded in a technical light, which would explain why they are reported on using output-level metrics (if at all). From this study's findings then, it is concluded that ***the symmetric organisational worldview that is present among South African organisations enables practitioners to own the function of stakeholder relationships and these relationships should be established in alignment with organisational outcomes, at which point it would become possible to articulate the outcomes expected from these activities. These outcomes could then be reported and translated into insights to help organisations navigate their operating environments.***

If relationships are to be measured at outcome-level and these measurements are used to inform evaluation that enables reporting on insights, the challenges practitioners face may impact the degree to which this capability is possible. Theoretically it was argued that practitioner knowledge about strategic PR theory could serve to overcome most barriers faced in PR measurement and evaluation (see Section 3.2.1). The globally prevalent challenges that were measured among respondents in this study came forth from the sixth theoretical statement:

Theoretical statement 6

Practitioners consistently face financial, time, knowledge, value, interest/understanding, and standardisation as barriers to conducting measurement and evaluation. The wide range of measurement and evaluation practices required to prove value necessitates that the PR practitioner is able to conduct rigorous research:

- *The PR practitioner must be educated/trained to conduct qualitative and quantitative research.*
- *The PR practitioner must be familiar with research best practice in order to produce reliable and valid research results across a broad spectrum of activities and platforms.*
- *Practitioner education/knowledge can help practitioners overcome the most common challenges.*

Chapter 5 (Section 5.3.4.2) reported that the most prominent challenges among this study's participants were financial barriers, a lack of standardisation (clarified as relating to metrics, in qualitative information), and time. From qualitative information it came forth that there were other technical challenges prominent in practice, and these related to technical measurement, competition from encroaching digitally-oriented teams, and educating their teams on why measurement and evaluation is necessary. It holds together that more technical practice would experience more technical challenges. The topic of advancing to a more strategic practice to eliminate challenges in measurement and evaluation was held by Swenson *et al.* (2019), Grunig (2013), and Austin *et al.* (2000) (see Section 3.2.1). Among this study's participants, no correlation could be found between the challenges practitioners experience and the Barcelona Principles, but a slight negative correlation was seen among the practitioner role as strategist and challenges, as well as practitioner knowledge, education, evaluation types, and reporting on insights (see Section 5.4.1.6). This trend of a negative correlation with strategic components provides some support for previous research that indicated that a more strategic PR function faces fewer challenges.

A prominent point that arose in this study's investigation into the challenges faced in measurement and evaluation, is a lack of standardisation in terms of metrics that should be used, to what end. This came forth from qualitative responses especially (see Section 5.3.4.2 and Section 5.3.4.4). Unfortunately, there is likely to be no one, globally standardised right answer to the question of metrics. The Barcelona Principles allude to metrics, but provides no detailed clear guidance on exactly what metrics must be used. The metrics used by the practitioner would simply be determined by the practice and the goals and outcomes set for the PR function, project, or campaign, which would be strategically aligned with the organisational goals in PR best practice. The variety contained

in this described scenario is simply too broad to provide a single answer of what metrics are “right” (see Section 3.4). Furthermore, multiple credible resources exist to this end that would clear up confusion over what different metrics mean and imply. The PR Measurement and Evaluation Dictionary, and global standardised tools such as AMEC’s PESO-based Integrated Evaluation Framework provide practitioners with the basic terminology and focus areas for measurement and evaluation to eliminate challenges of standardisation in terms of terminology. ***South African practitioners must therefore actively engage with global literature and practice-based information to align their own practices with these standards and eliminate this challenge of metrics standardisation in their own practice.***

This notion of the variety that impacts PR measurement and evaluation as a challenge would, in the most basic description of a strategic PR function be addressed through the core activity of strategic alignment, which manifests in the form of setting measurable goals and objectives. This action, if undertaken with care and consideration of the strategic information pertaining to the organisational goals and objectives obtained through strategic access, is the first enabler of evaluation to prove value – as was seen in the seventh theoretical statement:

Theoretical Statement 7

To ensure strategic alignment, measurable goals and objectives must be set at the start of the strategic communication management process to enable evaluation for proving value.

In reporting the results on the construct of strategic alignment, the practice of setting measurable goals at the start of PR programmes were seen to feature strongly among participants. This raises the question of why, then, practitioners struggle to prove their impact when it comes to measurement and evaluation? A possible explanation, though there is no way of knowing this for sure from this study’s data, is that the goals are set at a technical level because this is mainly where the core services of the PR function are focused. The relationship between strategic alignment and the level of measurement maturity was seen in practically significant correlations reported in Section 5.4.2.1 which provides a possible answer to the question raised above – less strategic alignment implies lower measurement maturity. It follows, then, that ***elevating strategic alignment and so the level of the goals being set would theoretically enable evaluation*** as stated in Theoretical Statement 7.

The importance of this strategic goal-setting is prominent in the Barcelona Principles, set as the first principle. This principle specifies that setting SMART goals is fundamental to good PR programmes and critical to any communication programme (see Table 3.5). It goes on to specify that these goals could be qualitative or quantitative and based on a clear understanding of the context in which the

programme is intended and is featured in the second principle, where it advises that these goals determine the outcomes to be measured. Thus, ***the phase of goal-setting as an act of strategic alignment is an important determinant of the level of measurement metrics that could later be employed and determines the practitioner's capability to report on outcomes.***

When the act of goal-setting is shifted to a higher level of strategic alignment that focuses on outcomes, the act of evaluation becomes more nuanced and theoretically it was seen that evaluation to prove value encompasses different evaluation types (see Section 3.3.4). These evaluation types will span across the lifespan of a PR programme and begins even before technical implementation of the programme commences. This was captured in the eighth theoretical statement:

Theoretical statement 8

Different evaluation types must be employed throughout the evaluation process to prove value:

- *Formative evaluation is necessary to inform PR goal setting and to set benchmarks for comparison during process reporting and for later comparisons.*
- *Process evaluation is necessary to conduct ongoing monitoring of PR efforts throughout the lifespan of PR programmes, tested consistently against benchmarks set through formative evaluation.*
- *Summative evaluation is necessary to prove that the objectives and goals of PR programmes were met after completing a PR programme, and must be used to report insights at strategic level.*
- *A combination of qualitative and quantitative research methods must be used to undertake formative, process, and summative evaluation and to determine and report on changes in outcomes.*

The practices implied by this theoretical statement were reported highly among participants in this study. The quantitative indications on these concepts were generally high, with the exception of qualitative research. As such, participants regarded themselves to align with and practice all evaluation types. Furthermore, Section 5.4.1.8 reported practically significant correlations among practitioners' indication of implementing different evaluation types and their ability to report on insights, their measurement maturity, and practitioner knowledge. These findings are aligned with the theoretical argument that different evaluation types allow for the nuance needed to conduct rigorous measurement and evaluation that enables proving value. It is especially interesting to note that the process of formative evaluation held the strongest correlation with reporting on insights, indicating that practitioners who realise the importance of measurement and evaluation before the

onset of a PR programme, are the ones most likely to prove the value of their PR activities – as was previously argued and found by other authors including Macnamara and Gregory (2018) and Macnamara (2018a) (see Section 3.3.4).

Different evaluation types are particularly emphasised in the Barcelona Principles, as it states throughout where it emphasises evaluation across goal-determined metrics (first principle); using qualitative and quantitative measurements (second principle), using surveys (third and fourth principles), using complementary research approaches (sixth principle); undertaking reliable and replicable measurements and trustworthy qualitative research (seventh principle).

However, a particular element that this research can highlight is the tendency found among participants to maintain a certain mysterious impact around, for example, content performance that made this practice more difficult. Practitioners would attribute different success rates across campaigns simply to the nature of PR, explaining how some content or channels may perform well at one point and significantly worse at another point (see Section 5.3.4.3). They maintained that PR is never guaranteed, and there are elements that determine success that lie well beyond the control of the PR practitioner. Accepting this notion as participants' truth, one can see how their measurement and evaluation of PR activities would be impacted and considered even erratic. For media relations and publicity practices, this would pose an issue. But, ***when PR practice is approached with a broad focus on the plethora of channels available today and harnesses the digital tools that create sophisticated, trackable communication funnels then different evaluation types would become more reliable and useful.***

This issue is thus seen to be closely related to measurement maturity. Measurement maturity, determined by the different levels of metrics utilised to report on the PR function's success, was already seen to be a challenge when practitioners cited a lack of standardisation in metrics as a barrier to measurement and evaluation (see Section 5.3.4.2). In the general body of PR literature, academic theory, and practice-related information, the use of inherently meaningless metrics is deemed unacceptable (see Section 3.4.1). This general discouragement of using metrics with questionable credibility was found in the ninth theoretical statement:

Theoretical statement 9

AVEs and multipliers, as well as the injudicious use of ROI, are definitively discredited metrics that have to be eliminated from practice. Reliable and valid measurement metrics must be employed at all measurement levels:

- *Metrics must set benchmarks for future assessments and successful activities at outcome, uptake, and output levels in order to determine effectiveness of activities and true change in outcomes.*
- *Social media outcome metrics must be used consistently with other media metrics.*

This study's participants reported, quantitatively, the different levels of metrics in the following order of prevalence – first output, second outcome, third uptake (see Section 5.3.4.4). A strong discrepancy was found in the quantitative report in terms of measurement level, and interview participants' ability to describe a high level of measurement maturity. Output-level metrics were by far the most prominent in qualitative information, and there were even mentions of 'gut-feel' to determine campaign success. The high prevalence of reporting on AVEs in both quantitative and qualitative results among participating practitioners (see Section 5.3.4.6) is a concerning finding. Despite years of campaigning against this metric, it remains rife in practice. Reading this in conjunction with the qualitative information on reporting on insights (Section 5.3.3.7) where there was little to be described other than monthly output-metric reports, paints a picture of low strategic alignment and a PR function that is unable to contribute to organisational viability and report on organisational outcomes. This was confirmed with the practically significant correlation found among measurement maturity and reporting on insights, and evaluation types. However, only a medium correlation could be found among measurement maturity and uptake of the Barcelona Principles.

The implication of these findings for measurement and evaluation is that measurement maturity is a strong predictor of success for evaluation, and of reporting on insights. This, however, can only be brought about by means of true strategic communication management, and throughout this discussion so far it has been mentioned at several points that without the foundation of strategic practice, measurement and evaluation would not be able to provide evidence of a valuable PR function. In the Barcelona Principles, metrics are particularly emphasised as the fifth principle that outlaws the use of AVEs, multipliers, and "pass-along values". It is also emphasised in the sixth Barcelona Principle, advocating for an integrated approach to social media measurement as a part of the holistic PR media mix. It also emphasises the importance of detecting true change by measuring outcomes and not only output- or uptake-level metrics (second principle). This, according to the Barcelona Principles, necessitates tailored empirical research (third and fourth principles).

The Barcelona Principles' advancement of standardisation in PR measurement and evaluation emphasises PR's focus on organisational outcomes in order to promote PR practices across the board that establishes a truly valuable PR function, and able to report on this value in a unified and holistic way. It is concluded that ***measurement maturity must be enhanced by focusing on outcome-level metrics determined by the process of strategic alignment and preceded by strategic access. It then requires research well beyond simply reporting on the metrics provided by media monitoring software of publication platforms to determine true changes and outcomes.***

Ultimately, considering the nine theoretical touchpoints discussed up to this point in terms of PR practice and measurement and evaluation, the use of the Barcelona Principles among this study's participants should be indicative of how practice enables the sophistication required to measure and evaluate the function's value (see Section 3.6). The theoretical notion was captured in the 10th and final theoretical statement:

Theoretical statement 10

In order to advance the field of standardised PR measurement and evaluation, PR practitioners must:

- *Have a formal evaluation process in place.*
- *Be aware of the Barcelona Principles and its prescripts.*
- *Implement the Barcelona Principles in practice according to its prescripts.*

This study's empirical findings (see Section 5.3.4.1) showed that quantitatively only 60% of respondents reported that their measurement and evaluation process is formalised. Furthermore, awareness of the Barcelona Principles was only reported at 44% (n=45), while some degree of implementation of the Barcelona Principles were reported at only 20% (n=21). These measures suggest that implementing the Barcelona Principles in South Africa is still a long way down the road. If the findings of this study are viewed holistically, then there is still some way to go in educating and guiding both PR practitioners and organisations in what to expect from and deliver on for a strategic PR function that is able to align with global standardisation for measurement and evaluation.

Due to this low awareness and implementation of the Barcelona Principles among this study's participants, comparative analyses reported in Section 5.4.1.10 could only find a practically significant correlation between strategic alignment and the Barcelona Principles. This highlights the essence of this study's theoretical argument – that standardised measurement and evaluation cannot take place

outside of the context of a highly strategic, aligned, and holistically integrated practice. ***It is ultimately concluded that strong measurement and evaluation that can align with global standardisation is determined through and enabled by PR practice and its level of maturity.*** A dedicated drive to stronger strategic practice is required before, or in conjunction with, the drive for awareness and implementation of the Barcelona Principles if true change is to be brought about in the South African PR landscape.

6.2.2.2 Normative guidelines for implementing the Barcelona Principles in the unique South African PR context

The synthesis of this study's findings leads to the conclusion that practice is the determinant of standardised measurement and evaluation. This is not a new notion, and globally it has been referenced to some extent or another by other authors such as Macnamara, (2005), Macnamara (2008b), Grunig (2013), Levine (2018), Likely (2018), Swenson *et al.* (2019), and others referenced in this study's literature review. The question of localisation should then be addressed to enable South African PR practice to adopt global PR standards for measurement and evaluation, specifically as it currently exists in the form of the Barcelona Principles. Aiming to set 'normative' guidelines would suppose, as mentioned in Section 1.3, "what should be done, but in a practical context" (Toth, 1994:51) to provide solutions under typical conditions for South African PR practice.

What makes the South African PR practice unique, from this study's findings, is largely found to be practice-related elements that disable measurement and evaluation as it deviates from theoretical PR best practice, prescripts, and global norms. It was found that South African PR practice lacks *practice maturity* in that there is still limited strategic access for practitioners, low strategic alignment as a result thereof, and little role specialisation as most practitioners fulfil multiple roles. Despite the strong indications of symmetric organisational worldviews, there is still also little ownership of stakeholder relationships among the South African PR functions investigated in this study. This leads to a measurement and evaluation landscape where technical practice may lead to technical measurement and low evaluation. Challenges experienced by practitioners relate to technical aspects and output-level metrics, reporting on insights in actual practice is low, and practitioners find it difficult to accurately employ different evaluation types and indicate almost no place for research in measurement and evaluation. Discredited metrics such as AVEs are widely used by practitioners, and awareness of standardisation is very low – with even lower implementation.

This study has revealed that the South African PR practice may simply not yet be at a level of maturity where it can comfortably implement the global norms expected by the Barcelona Principles (see Section 3.6). This finding echoes that of international research by Swenson *et al.* (2019) for the South

African PR context, as it was described in Section 3.2.1 where they had found mature PR practice to help overcome measurement and evaluation barriers and that mature measurement will span across all levels of mature practice. This moves the conclusion into a natural direction where the practice first needs to be addressed, whereupon the standardised measurement and evaluation thereof can almost naturally follow.

Some of the most foundational PR theories that came from the reflective and functional paradigms as discussed in Chapter 2 guides this notion. This addressing of practice would first constitute that the PR function in the organisational structure is regarded a strategic function and the practitioner therefore functions as strategist in the context of a symmetric organisational worldview. It then supposes that the practitioner has access to strategic information as it pertains to the organisation's strategy, vision, key pain points, organisational challenges, the organisation's positioning in its operative context, the organisation's business imperatives, the views and opinions of internal and external stakeholders and how these influence organisational objectives, and the organisation's role as citizen in its environment. Practitioners with this level of strategic access need to be aware of and sensitive to the dynamics of the organisation and how it translates to the broader economic, social, and environmental context. At this level, the PR strategist should be truly engaged with the organisational cybernetic environment and use this environmental information to inform strategy.

With this level of strategic access, the practitioner would be enabled to apply strategic communication management through strategic alignment. This practice needs to be executed as a holistic, uniform, and consistent PR approach that spans across all communication channels afforded in the current digitally engaged world. This would mean that media placements and publicity can only form a small part of the PR approach. The PR approach should span across traditional media, social media, digital media, and stakeholder engagement opportunities, while taking care to position each PR activity in the context of the organisational environment to achieve the organisational outcomes. In this space, PR activities cannot be siloed and it cannot be deaf to its environment.

There is a great opportunity to use research and intelligent data to ensure that communication funnels are constructed in such a way that it can cut through noise and meet stakeholders where they are already engaged. This would entail research that determines how and where stakeholders are consuming content, in what formats they are consuming content, and using digital tools to track and target stakeholders with relevant messages at appropriate times and places. A simple example of this is to use digital targeting in an iterative process to retarget content consumers based on previous content they have consumed. This will lead them on specific trackable paths, and ultimately lead to conversions (for whatever the conversion goal is). Thus, being aware of what people want to

consume, how they consume it, and where they should ideally end up while considering the current opinions they hold and what influences those decisions all for the purpose of eliciting a meaningful response that aligns with the organisation's desired outcomes would constitute strategic practice that allows for mature measurement and reporting on the impact of the PR function.

The next opportunity that should be embraced by South African practitioners in this context is stakeholder relationships from the relational paradigm discussed in Chapter 2. Consistent communication, now more trackable than ever at each touch point, should serve to build and maintain stakeholder relationships with a specific purpose and expected outcomes in mind. Setting expected outcomes would enable its measurement at a higher level and the value of these relationships can then be expressed and reported on in a meaningful way. This means creating platforms that are relevant and useful to stakeholders where the organisation can continuously listen and engage on key issues, perceptions, and opinions – and this listening activity will inform ongoing communication that further builds stakeholder relationships.

For measurement and evaluation as discussed throughout Chapter 3, this practice approach contains a combination of different evaluation types, and the metrics used to measure impact would be set at each level of engagement. The core component is, however, integration. Through integration across channels and stakeholders in communication activities, communities are formed and the organisation achieves a higher purpose alongside fulfilling its operational mission by structuring and facilitating information across systems. This study aims not to contribute to the existing comprehensive lists of metrics, prescripts, and evaluation indicators or practitioner KPIs. Instead, it serves to highlight the crucial role of mature practice to enable mature measurement and evaluation which appeared to be especially pertinent to South African PR practice in order to align with the Barcelona Principles. PR practices that operate in exclusivity cannot prove the value of the PR function, and providing metrics on one component of what modern PR entails will not enable standardisation in measurement and evaluation.

The final outcome of integrated, strategic PR activities would then constitute PR value, where the practitioner can use a combination of intelligent data, empirical research, and tangible outcomes to show how the function contributes to systemic viability and aids organisational survival.

The concept of integration as applicable to measurement maturity as it is to practice maturity. Measurement maturity and practice maturity are inherently linked and therefore it is here conceptualised that practice maturity would determine the possible level of measurement maturity that can be achieved. This idea can be expressed in its simplest form as a matrix that combines practice maturity and measurement maturity as independent dependent variables:

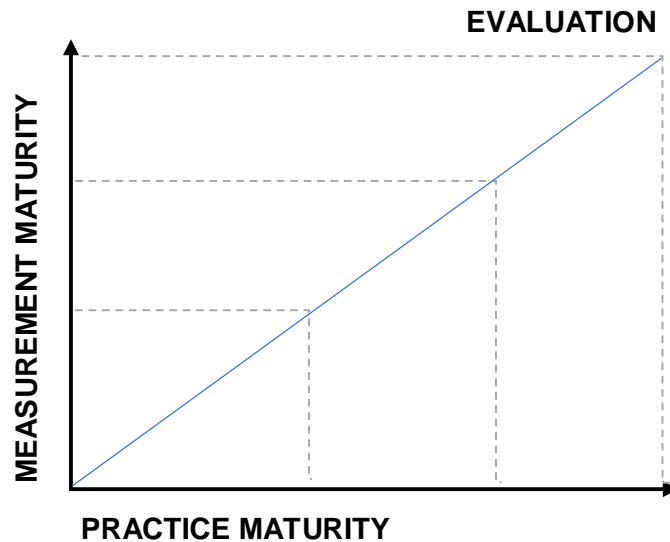


Figure 6.1 Practice and Measurement Maturity Matrix

This matrix presents a diagrammatic representation of the synergy between practice and measurement and evaluation thereof, with the highest level of practice enabling the ideal level of evaluation that is aligned with the Barcelona Principles. This synergy is paramount in working towards global standardisation for the unique South African PR context where this study has found practice-related constructs to be the greatest disabler or enabler of measurement and evaluation.

Essentially, this matrix represents a process in its simplest form of determining the level of practice maturity, and then finding the level of measurement maturity that is possible for the actual level of practice maturity. However, it implies a second question of where measurement maturity *could* be, considering the level of current practice. This would then indicate where the focus for improvement should be – if the practice is at a high level of maturity, yet the level of measurement maturity is still low, the practitioner would not be able to align with the Barcelona Principles and the focus for improvement would be on finding the right metrics and indicators of value that would be an accurate portrayal of a mature practice. On the other hand, the practice maturity may prove to be low and therefore the practitioner looking for measurement maturity would be constantly frustrated in their inability to prove a valuable PR function – what this matrix would show, is where and to what extent practice maturity need to increase in order to enable a higher level of measurement maturity.

This diagrammatic representation is clearly a reduction to the essence in order to convey the principle of synchronisation between practice and measurement and evaluation. However, a third plane must be theoretically considered that relates to the *quality* of practice and the *quality* of measurement.

Practice in its most mature form, but of poor quality, will not serve to realise the value of the function. The same goes for measurement, where measurement of high maturity but poor quality will not enable proving the value of PR. The dimension of quality for both constructs must therefore be carefully considered and elevated by practitioners throughout the processes of PR practice and its measurement. For ascertaining quality in practice, the research of authors cited already such as Grunig (2013) stands, arguing for PR practitioners to become highly educated in strategic PR. For ascertaining quality in measurement, the research of authors cited already such as Swenson *et al.* (2019) stands, arguing for PR practitioners to hone research skills in themselves and in their teams. This study's findings had highlighted the fact that these two components are often disjointed in South African PR practice. The element of quality in both practice and measurement therefore introduces a third dimension of synchronisation to be considered on the scale of interaction between practice and measurement.

Ultimately, the interaction between practice and measurement and evaluation can be navigated, but these two constructs cannot be untied from one another. Considering the theoretical constructs this study utilised to arrive at this conclusion, practice maturity would entail processes of strategic access, strategic alignment, the practitioner functioning in a strategic capacity, and building stakeholder-relationships with specific outcomes in mind. Measurement maturity would be determined by the degree to which measurable objectives were set, and what measurement and evaluation options and capacity the practitioner have at their disposal would be determined by the expected outcomes for the PR function, the PR programme, or the PR activity.

The following normative guidelines are therefore proposed for implementing the Barcelona Principles in the unique South African PR context:

1. The level of maturity in PR practice can and must be used to determine the level of measurement maturity that can be achieved.

There exists a strong link between how PR is practised and the measurement that can realise. The level of practice maturity can provide an indication of the measurement maturity that is possible. Therefore, practitioners wishing to enhance their measurement must look to their practices and determine what level of measurement maturity they can achieve with their practices. Higher levels of measurement maturity to prove effectiveness, would enable evaluation to prove value.

2. PR practice and PR measurement and evaluation should be synchronised from the start of any PR strategy, and this synchronisation should already reflect during the process of informed strategic alignment.

A strategic approach from the onset of any PR programme, campaign, or project must prioritise the strategic organisational outcomes. Secondary strategic alignment, the act of aligning PR activities with PR goals, cannot alone produce effective *evaluation*. Primary strategic alignment, the act of aligning PR outcomes with those of the organisation, must be the starting point for practitioners. This implies that practitioners are knowledgeable and able to articulate strategic PR practices, and converse at executive level on these practices to bring about strategic alignment. Clear and tangible statements of what the expected outcomes are and how it ties to organisational outcomes can be utilised to bring about this synchronisation.

3. Purposeful goal-setting should be imperative for PR practitioners, as this determines the outcomes of PR activities.

If PR goals are constructed in such a way that it articulates outputs, measurement maturity would be restricted to outputs. Conversely, if goals are set to describe strategically aligned and clearly defined outcomes, then measurement and evaluation can be elevated to report on outcomes at impact-level. This guideline is another step towards articulating strategic PR practices which will enable measurement maturity. If goals are constructed to reflect outcomes, it would follow that metrics are not the main feature for reporting on the PR function. Instead, the conversations around PR value would be centred around the strategic imperatives of organisations and this would lower the risk of PR's value being reduced to metrics.

4. PR practitioners in South Africa need to move toward role specialisation, and act in a true strategic capacity that can bring about synchronisation in execution.

This is especially true for small PR teams. Stronger role specialisation would enable the PR practitioner as strategist to have greater capacity for ensuring that the PR function acts as a valuable contributor to the organisational strategy. It would also serve to overcome the barrier of time as a constraint of measurement and evaluation, and would create a bridge between PR as a functional business element and PR as a strategic business element. The managerial and technician roles in PR functions must be tasked with successful execution and measurement of PR programmes, while the strategic direction must be determined and maintained by the strategist as an executive liaison. In this, collaboration with other business functions that owns capabilities PR needs but may not possess must also be leveraged by practitioners. With this level of specialisation and collaboration, PR can achieve higher outcomes with minimal strain to their function.

5. In order to prove value, PR activities and communication channels cannot stand on its own but should be integrated in such a way that it goes far beyond a sender/receiver model.

In order to bring about quality in PR practice, the PR function must harness the multitude of tools and platforms available to create audience experiences that build relationships that work toward realising outcomes. The strategic synchronisation between PR and the organisation must produce a holistic, integrated PR execution that spans across multiple strategic platforms. PR practices should thus be designed to create multiple touch points across different channels that integrate traditional, digital, and social media to the extent that it serves as an ongoing conversation that can be strategically managed and measured through targeting and intelligent use of data. Inherent to this integrated approach is also the importance of claiming ownership of stakeholder relationships as a PR function and the outcomes of these relationships should be determined at goal-setting level already.

6. PR practitioners must be research and data experts.

Relating to measurement quality, PR should utilise research to inform, shape, and structure PR programmes in such a way that it can contribute to organisational goals. It follows that this research must be methodologically sound. Primary and secondary research must be integrated as part of the PR process in order to produce robust informative findings for setting PR strategies, but also to create deep and insightful reports on PR efforts. Practitioners pioneering quality research and data will enable their own PR function to claim and prove success in terms of actual organisational outcomes.

7. The organisational expectations from measurement and evaluation should be set at a higher level as an ongoing shift, driven by practitioners.

Instead of reporting on metrics that management or clients are satisfied with, the onus is on practitioners to set new and higher aims for their own functions and translate this to the executive reporting line. The PR practitioner who possesses the capability of maintaining high-level strategic conversation around PR, can provide reliable research data, and who practises PR at true strategic level with specialised knowledge can codify it for those outside the field. The practice of reporting on metrics can only be reduced if PR is practised in such a way that it can converse around outcomes, provide insights, and have informed discussions around organisational imperatives which will set executive expectations at a strategic level.

These guidelines are suggested to promote understanding of how PR practitioners in South Africa can implement the Barcelona Principles through a series of adjustments that accommodate the unique South African PR landscape, with specific consideration of the updated findings this study produced on South African practice and measurement and evaluation. Implementing these normative guidelines could serve to elevate PR practices to a higher level of maturity that unlocks measurement maturity and ultimately enable implementing the Barcelona Principles.

6.3 Contribution of the study

This study served the purpose of investigating the current PR landscape in South Africa in terms of PR practice as well as PR measurement and evaluation practices. Its first contribution is providing an updated overview of how PR is currently practised and measured and evaluated in South Africa. As such it provided a profile of what current local practitioners and practice look like. In a global context it also provided an estimation of how local practitioners are aligning themselves with global PR best practice, to what extent they conform to global best practice for PR measurement and evaluation, and set benchmarks for their awareness and implementation of the Barcelona Principles.

Beyond these descriptive statistics, however, the study showed that in the unique South African PR context, PR practice cannot be isolated from PR measurement and evaluation and vice versa. Overall it concluded that current immature practice act as the major barrier to measurement maturity, and through a process of plotting practice and measurement maturity as dependent and independent variables practitioners can identify the opportunities for optimisation to better align themselves with the global standardised guidelines for PR measurement and evaluation. The issue of implementing the Barcelona Principles is not a lack of metrics, nor is it a unique set of challenges that practitioners face in South Africa. It is simply practices that cannot accommodate mature measurement that enables evaluation which leads to reporting on insights.

This study's findings hold several practical implications. It serves to point practitioners towards a starting point when reflecting on their own measurement and evaluation, and how it could be brought into stronger alignment with global standardisation. It also provides the South African PR industry with data that may be valuable for informing future industry movements. Industry bodies and -leaders with a South African focus may find this data useful to institute awareness campaigns and to create practice guidelines that can guide the industry toward stronger measurement and evaluation. This study's findings can also be used for future comparative studies on the South African PR industry to determine changes in behaviour or practices, even in the demographic composition of the PR industry. Lastly, a large part of this study's population consisted of PR agencies and the majority of interviews were conducted with agency-bound practitioners. Considering the global trend towards the increasing prominence of the contract economy in the future, the findings of this study that are relevant to PR agencies are more important than ever and can set a benchmark for this specific type of practice for future industry research.

6.4 Recommendations for future research

This study can be built on in several ways. A particular area of pragmatic future research that may hold value is an investigation into the managerial and client expectations of PR, and what drives the need for the PR function in South Africa. Future studies can also elaborate on more nuanced practice elements that influence and enable PR measurement and evaluation in South African practice, especially among PR practitioners that function at executive level. Another area of interest that this study highlighted is an investigation into the challenges to measurement and evaluation among South African PR practitioners. This study showed that technical challenges were prevalent to a larger extent, but this may not be the case for different contexts of PR practitioners. The study further creates the opportunity for future investigation into and expansion of the practice-measurement maturity matrix to refine the concept, represent the dimension of quality, and create a practice-oriented tool that details the plotting points for practice and measurement maturity and quality in order to move toward evaluation, including the metrics expected or proposed to be used at plotted intersections on the matrix. This may result in a useful tool that can pragmatically guide practitioners toward high quality, more mature practices on both axes of the matrix, in alignment with and complementary to other existing global frameworks such as AMEC's Measurement Maturity Mapper. Finally, this study paves the way for ongoing inquiry into standardisation of PR measurement and evaluation in South Africa and it could be replicated to determine changes in the constructs it investigated on an ongoing basis, with a wider scope. This could build towards developing a measurement instrument that is suitable and tailored to South African PR practice. It could also be extended toward the African continent and especially Southern Africa, where practice is governed by the same industry body.

6.5 Limitations of the study

This first limitation for this study was a lack of consolidated benchmark data and information on South African PR practice. At its onset, no studies could be found that investigated current measurement and evaluation practices as it pertained to the Barcelona Principles, and little information was available that could guide the study's inquiry into measurement and evaluation practices in this context in general. This led to the necessity to widen the scope of the research to also include a prominent practice component, which allowed for a less detailed investigation into measurement and evaluation specifically. If a stronger base of practice-based inquiry existed, the study could have been designed in such a way that it drew comparisons with baseline data on the implementation of the Barcelona Principles in South African PR practice and investigated the executive influence thereon,

the industry's driving factors, and the measures that has to date been implemented by industry leaders and the effects thereof on practice. It must also be noted that over the course of this study's completion, major works on this topic was published and this study had to constantly align with new global findings and new concepts introduced into industry-led global conversations around PR measurement and evaluation. Furthermore, the lack of responses to the empirical phase of this study posed a limitation in its representativeness and statistical analyses. This may indicate a generally disengaged practice. However, the final sample of participants that constituted this study's population was highly homogenous and this indicates that there is a specific profile of practitioners that are engaged enough with the topic of measurement and evaluation to the extent that they were eager to contribute to working towards a solution for their own struggles with the topic. Finally, this study's theoretical framing could be considered a limitation as it was deliberately limited to very basic and well-established theoretical concepts and paradigms. Exploring this topic from other meta-theoretical paradigms could have produced very interesting results. However, this choice was made in order to reduce the concepts of practice and measurement and evaluation to the essence, as this study was the first of its kind for South African practice to focus so pertinently on the Barcelona Principles.

6.6 Final conclusion

In the unique South African PR context, practitioners must look towards the level of practice maturity to determine the extent to which they can implement mature measurement and ultimately align their practice with the Barcelona Principles as global standard for measurement and evaluation. PR practice and its measurement and evaluation cannot be viewed as apart from one another and if practitioners wish to enhance their measurement and evaluation they must first look at how they can elevate their practice to bring about the value they wish to report on.

APPENDIX A

Survey Email Content:

Do you have a cup of coffee and 8 minutes to help a PhD student with a PR survey?

Dear << First Name >>>,

As a member of the South African PR industry, you and your team are invited to participate in a quick survey about PR Measurement and Evaluation in South African PR practice:

<https://forms.gle/t5ZSNVYGm8HRGPR98>

This survey (completely mobile-friendly) forms part of a PhD study looking at how the value of PR can best be proven, and how we are practising and evaluating PR in South Africa. While it does ask a little personal info, all information will be treated completely confidential and anonymous, and your information will not be used for any other purposes than this research.

The survey takes about 8 minutes to complete. For any enquiries about this project, you can contact the researcher directly anytime at tersia.phd@gmail.com.

Regards

Tersia Landsberg
PhD Candidate of the North-West University

Survey title: PR Measurement and Evaluation | PhD

Survey Cover:

This survey forms part of a PhD study investigating the standardisation of PR measurement and evaluation in South African PR practice.

Please provide your email address for identification and control. This is also an important part to ensure you can be contacted if necessary and identified should you wish to withdraw from the study at any point.

This research is completely confidential and your information will not be used for any purpose other than this research. Reporting is completely anonymous and no participant will be identified in the results. Proof of ethical clearance is available upon request from the researcher.

The researcher can be contacted at tersia.phd@gmail.com.

Survey Questionnaire:

CONSTRUCT	CONCEPT	QUESTION NR	QUESTION	ANSWER OPTIONS
Demographics - practice	Size of PR Team	1	How many people are in the PR team of your organisation?	1-5
				6-10
				11-15
				16-20
				21-25
				26-30
				31+
	Type of practice	2	Please indicate your type of occupation in PR	In-house practitioner
				Communication agency
				Freelance
				Student
				Other
	Reporting line	3	Which of the following best describes the reporting line of your PR team?	CEO/President/ Managing Director
				Marketing
				Strategic planning
				Human Resources
				Operations
				Legal
			Other	

CONSTRUCT	CONCEPT	QUESTION NR	QUESTION	ANSWER OPTIONS
Practitioner role	Technician	4	My job entails technical implementation tasks such as drafting/designing communication material, crafting content for different communication platforms (social media, digital content publication, press releases, editorials, etc.), and distributing messages to stakeholders via different channels.	Strongly Agree - Strongly Disagree
	Manager	5	My job entails managerial tasks such as determining the stakeholders for and platforms to use in campaigns, develop communication plans and campaigns, oversee the execution of campaigns, compile reports on communication plans or campaigns, field media questions, or host press conferences.	Strongly Agree - Strongly Disagree
	Strategist	6	My job entails strategic tasks such as determining and preempting any issues that may affect my organisation or client, decide the strategic direction of communication campaigns, translate the impact of stakeholders to Management, and report on communication success to top management.	Strongly Agree - Strongly Disagree
Strategic access	Information access	7	I have access to the organisation/client's strategic information (such as business goals, strategic direction, product/service development, business performance, etc.).	Strongly Agree - Strongly Disagree
	Decision-making	8	My PR team is likely to be included in meetings or discussions where the organisation/client's strategic business decisions are being made.	Strongly Agree - Strongly Disagree
Symmetric worldview	Stakeholder dialogue	9	My organisation/clients often engage with their stakeholders to gain their opinions on matters relevant to their stakeholders.	Strongly Agree - Strongly Disagree
		10	My organisation/clients communicate in an open and transparent way with their stakeholders.	Strongly Agree - Strongly Disagree
	Innovation	11	My organisation/clients regularly bring teams together to share information that leads to innovation.	Strongly Agree - Strongly Disagree
Barcelona Principles	Formal process	12	My PR team has a formal measurement and evaluation process for determining the success of our PR campaigns.	Strongly Agree - Strongly Disagree
	Awareness	13	I am familiar with the Barcelona Principles for PR measurement and evaluation.	Strongly Agree - Strongly Disagree
	Implementation	14	My PR team implements the Barcelona Principles for PR measurement and evaluation.	Strongly Agree - Strongly Disagree
Strategic alignment	Measurable goals	15	My PR team sets SMART (Simple, Measurable, Attainable, Realistic, Time-bound) goals when planning PR campaigns.	Strongly Agree - Strongly Disagree
	Secondary strategic alignment	16	My PR team uses benchmark data from previous campaigns (if it is available) to inform our goal-setting when planning PR campaigns.	Strongly Agree - Strongly Disagree
		17	When deciding on PR campaign activities, my PR team uses research and previous data to select activities that offer the best chance of reaching the campaign goals.	Strongly Agree - Strongly Disagree
	Primary strategic alignment	18	My PR team aligns PR goals with the business goals of the organisation.	Strongly Agree - Strongly Disagree

CONSTRUCT	CONCEPT	QUESTION NR	QUESTION	ANSWER OPTIONS
		19	When deciding on PR campaign activities, my PR team critically evaluates each activity to ensure it will help reach the campaign goals.	Strongly Agree - Strongly Disagree
Relationships	Stakeholder relationship building	20	Building relationships with stakeholders is a key performance indicator of my current job.	Strongly Agree - Strongly Disagree
	Stakeholder reporting	21	My PR team reports on stakeholder relationships to indicate the success of our PR activities.	Strongly Agree - Strongly Disagree
		22	My PR team reports on how stakeholder relationships influence the business goals of the organisation.	Strongly Agree - Strongly Disagree
Practitioner knowledge	Practitioner research capacity	23	I have a good understanding of different research methods (such as surveys, focus groups, content analyses, and interviews).	Strongly Agree - Strongly Disagree
		24	I am confident to apply different research methods (such as surveys, focus groups, content analyses, and interviews).	Strongly Agree - Strongly Disagree
Challenges			In measuring and evaluating PR efforts, the following challenges affect me:	
	Financial	25	Financial restraints	Strongly Agree - Strongly Disagree
	Time	26	Time, to undertake measurement and evaluation activities	Strongly Agree - Strongly Disagree
	Knowledge	27	Lack of research knowledge/expertise	Strongly Agree - Strongly Disagree
	Value	28	Uncertainty over what constitutes the value of PR activities	Strongly Agree - Strongly Disagree
	Understanding/interest	29	Lack of understanding or interest from management/clients	Strongly Agree - Strongly Disagree
	Standardisation	30	Lack of standardised terminology or standard evaluation practices	Strongly Agree - Strongly Disagree
Reporting on insights	Generating suggestions	31	My PR team uses data from PR campaigns' evaluation to make actionable business suggestions when reporting on PR efforts.	Strongly Agree - Strongly Disagree
		32	The information my PR team provides is used to help the organisation/client's leaders make better decisions.	Strongly Agree - Strongly Disagree
	Translating impact	33	My PR team explains to the organisation/client how external factors or issues may affect the organisation.	Strongly Agree - Strongly Disagree
Evaluation types	Formative evaluation	34	My PR team uses research in the planning phase of new PR campaigns already, so that we can create a strategy that best suits the current situation.	Strongly Agree - Strongly Disagree
		35	My PR team uses information and data from previous campaigns' performance when planning new campaigns.	Strongly Agree - Strongly Disagree
	Process evaluation	36	My PR team tracks the effectiveness of PR activities while the campaigns are running, to identify problems immediately.	Strongly Agree - Strongly Disagree
		37	My PR team adjusts our strategy during the course of a campaign when we detect any problems.	Strongly Agree - Strongly Disagree
	Summative evaluation	38	My PR team evaluates the success of our PR campaigns at its end to determine whether we have reached our goals.	Strongly Agree - Strongly Disagree

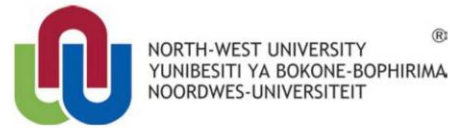
CONSTRUCT	CONCEPT	QUESTION NR	QUESTION	ANSWER OPTIONS
		39	My PR team uses our campaign evaluation to determine how the organisation/client has been affected by PR activities.	Strongly Agree - Strongly Disagree
	Quantitative evaluation	40	My PR team uses quantitative evaluation (such as surveys with hard data and statistics) to determine our success.	Strongly Agree - Strongly Disagree
	Qualitative evaluation	41	My PR team uses qualitative evaluation (such as focus groups, content analyses, or interviews) to determine our success.	Strongly Agree - Strongly Disagree
Measurement maturity	Outcome level	42	My PR team measures the outcomes of our PR campaigns (such as behavioural changes in stakeholders, or changes in stakeholder's attitudes and opinions).	Strongly Agree - Strongly Disagree
	Outtake level	43	My PR team measures the outtakes of our PR campaigns (such as message retention among the target audience, or that stakeholders understand our messages).	Strongly Agree - Strongly Disagree
	Output level	44	My PR team measures the outputs of our PR campaigns (such as media placements, audience size, reach, impressions, fans, webpage hits, clickthroughs, views, downloads, or followers).	Strongly Agree - Strongly Disagree
Social	Social media	45	My PR team measures social media consistently with other media channels.	Strongly Agree - Strongly Disagree
AVEs	AVEs	46	My PR team uses Advertising Value Equivalence (AVEs) when measuring and reporting on PR campaigns.	Strongly Agree - Strongly Disagree
	Multipliers	47	My PR team use multipliers to enhance the value of Advertising Value Equivalence (AVEs) when reporting on this value.	Strongly Agree - Strongly Disagree
Demographics - practitioner	Age	48	Please indicate your age group	18-20
				21-25
				26-30
				31-35
				36-40
				41-45
				46-50
				51-55
				56-60
			61+	
	Gender	49	Please indicate your gender	Female
				Male
				Other
				Prefer not to disclose
	Experience	50	How many years' experience do you have in PR?	0-5
				6-10
				11-15
				16-20
				21+
Education	51	What is the highest level of formal PR/communications education you have obtained?	No formal education	
			Certificate or equivalent	
			Formal degree or equivalent	

CONSTRUCT	CONCEPT	QUESTION NR	QUESTION	ANSWER OPTIONS
				Post-graduate degree
	Professional affiliation	52	Please select which of the following professional PR body/bodies you are affiliated with:	Public Relations Insitute of Souther Africa (PRISA)
				International Association of Business Communicators (IABC)
				Both PRISA and IABC
				Other
				None

APPENDIX B

Question Number	QUESTION
1	How many people are in your PR department?
2	Do you work for an agency, as inhouse practitioner, freelancer, other type of occupation?
3	What are your thoughts on measurement and evaluation of PR efforts?
	What role does evaluation play in your work?
	What benefits do you see in evaluation?
	What factors most influences evaluation in your work?
4	How do you approach measurement and evaluation of your PR efforts in your organisation/department?
5	What approach do you typically take to measuring and evaluating PR campaigns from start to end?
	What are your thoughts on the metrics PR practitioners use for evaluation?
	What role does research play in your measurement and evaluation process?
6	What challenges do you face in evaluation?
	Why do you think you face these challenges?
	To what extent do you think these challenges are a common occurrence for practitioners in the PR industry?
	What could best help you overcome your challenges?
7	Why do you measure and evaluate your PR campaigns or projects?
	To what extent does your measurement and evaluation have strategic influence, changing the way the organisation behave or act?
8	To what extent do you believe the top leadership of your organisation (or your client) affect the way in which you measure and evaluate your PR efforts?
	How do you get the buy-in of top management in your measurement and evaluation efforts?
	To what extent does your measurement and evaluation affect the way they perceive PR?
9	To what extent are you familiar with the Barcelona Principles?
	What do you think about the Barcelona Principles?
	How have the principles served to enhance your measurement and evaluation practices?
	What effect do you think has the Barcelona Principles had on the PR industry's advancement of measurement and evaluation?
10	What is your age?
11	What gender do you identify with?
12	How many years PR experience do you have?
13	What is your highest level of education?

APPENDIX C



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Institutional Research Ethics Regulatory Committee

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Email: Ethics@nwu.ac.za

ETHICS APPROVAL CERTIFICATE OF PROJECT

Based on approval by the **Research Ethics Committee of the Faculty of Arts (FA-REC)** at the meeting held on **2017-04-20**, the North-West University Institutional Research Ethics Regulatory Committee (NWU-IRERC) hereby **approves** your project as indicated below. This implies that the NWU-IRERC grants its permission that, provided the special conditions specified below are met and pending any other authorisation that may be necessary, the project may be initiated, using the ethics number below.

Project title: Standardised Measurement and Evaluation of PR: Normative guidelines for South African practitioners.																																												
Project Leader/Supervisor: Dr Marlene Wiggill																																												
Student: T. Landsberg																																												
Ethics number:	<table border="1"><tr><td>N</td><td>W</td><td>U</td><td>-</td><td>0</td><td>0</td><td>4</td><td>5</td><td>7</td><td>-</td><td>1</td><td>7</td><td>-</td><td>A</td><td>7</td></tr><tr><td colspan="3">Institution</td><td colspan="5">Project Number</td><td colspan="3">Year</td><td colspan="2">Status</td></tr><tr><td colspan="15"><small>Status: S = Submission; R = Re-Submission; P = Provisional Authorisation; A = Authorisation</small></td></tr></table>	N	W	U	-	0	0	4	5	7	-	1	7	-	A	7	Institution			Project Number					Year			Status		<small>Status: S = Submission; R = Re-Submission; P = Provisional Authorisation; A = Authorisation</small>														
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Risk:	<table border="1"><tr><td>N/A</td></tr></table>	N/A																																										
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Special conditions of the approval (if applicable):

- Translation of the informed consent document to the languages applicable to the study participants should be submitted to the FA-REC (if applicable).
- Any research at governmental or private institutions, permission must still be obtained from relevant authorities and provided to the FA-REC. Ethics approval is required BEFORE approval can be obtained from these authorities.

General conditions:

While this ethics approval is subject to all declarations, undertakings and agreements incorporated and signed in the application form, please note the following:

- The project leader (principle investigator) must report in the prescribed format to the NWU-IRERC via FA-REC:
 - annually (or as otherwise requested) on the progress of the project, and upon completion of the project
 - without any delay in case of any adverse event (or any matter that interrupts sound ethical principles) during the course of the project.
 - Annually a number of projects may be randomly selected for an external audit.
- The approval applies strictly to the protocol as stipulated in the application form. Would any changes to the protocol be deemed necessary during the course of the project, the project leader must apply for approval of these changes at the FA-REC. Would there be deviated from the project protocol without the necessary approval of such changes, the ethics approval is immediately and automatically forfeited.
- The date of approval indicates the first date that the project may be started. Would the project have to continue after the expiry date, a new application must be made to the NWU-IRERC via FA-REC and new approval received before or on the expiry date.
- In the interest of ethical responsibility the NWU-IRERC and FA-REC retains the right to:
 - request access to any information or data at any time during the course or after completion of the project;
 - to ask further questions, seek additional information, require further modification or monitor the conduct of your research or the informed consent process.
 - withdraw or postpone approval if:
 - any unethical principles or practices of the project are revealed or suspected,
 - it becomes apparent that any relevant information was withheld from the FA-REC or that information has been false or misrepresented,
 - the required annual report and reporting of adverse events was not done timely and accurately,
 - new institutional rules, national legislation or international conventions deem it necessary.
- FA-REC can be contacted for further information via Yvette van der Merwe (13128388@nwu.ac.za) or 018 285 2301.

The IRERC would like to remain at your service as scientist and researcher, and wishes you well with your project. Please do not hesitate to contact the IRERC or FA-REC for any further enquiries or requests for assistance.

Yours sincerely

Prof LA
Du Plessis

Digitally signed by
Prof LA Du Plessis
Date: 2017.05.26
10:04:44 +02'00'

Prof Linda du Plessis

Chair NWU Institutional Research Ethics Regulatory Committee (IRERC)

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