



BARCELONA PRINCIPLES 3.0

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Why 3.0

The communication landscape is rapidly evolving. Some of the practices that were new in 2010 when the Barcelona Principles were initially created are now dated. Even those updates to the Principles in 2015 have become less than current.

To remain the foundational basis on which communication measurement and evaluation takes place, the Barcelona Principles needed a refresh to properly reflect this shifting landscape.

Overall Positioning

As communication measurement has evolved, it has become increasingly important that the Barcelona Principles are able to be applied to the larger communication function of any organization, government, company or brand globally. As such, the Principles now reflect a broader standard of measurement, focused heavily on measuring what matters to drive continuous improvement within an organization rather than solely proving the value of communication. And, with social and digital measurement now a table-stake in communication, the Principles reflect a more holistic approach that standardizes measurement across all channels, with an eye toward allowing choice in where to invest in communication to drive optimal organizational performance toward one's mission.

Principle 1

Where we are today:
**Setting Measurable Goals
is an Absolute
Prerequisite to
Communication Planning,
Measurement, and
Evaluation**

Where we went in 2015:
Goal Setting and Measurement
are Fundamental to
Communication and Public
Relations

Where we started in 2010:
Importance of Goal Setting and
Measurement

What To Do:

- Goals start with the change you want to see, and should be founded in research
- Goals should be defined prior to the start of the campaign or communication program
- Consider the timeframe of the goals, what is realistic for the short-term, vs. long-term
- Goals are not KPIs, but KPIs can be a component of goals
- Make goals quantitative and/or qualitative, but still identify who, what, how much, by when
 - Specifically, who you are trying to reach, what you are trying to say, how much of an impact you are trying to have, and when you want to see the change
 - Goals should be guided using SMART objectives (specific, measurable, achievable, relevant and time-bound)
- Be holistic, integrated and aligned across paid, earned, organic, influencer, shared, and owned channels where possible as well as across the outcomes continuum
- Goals should be revisited throughout the campaign/year to optimize and reflect progression over time
- Only conduct measurement and evaluation against defined goals

Principle 2

Where we are today:
Measurement and Evaluation Should Identify Outputs, Outcomes, and Potential Impact.

Where we went in 2015:
Measuring Communication Outcomes is Recommended Versus Only Measuring Outputs
Where we started in 2010:
Measuring the Effect on Outcomes is Preferred to Measuring Outputs

What To Do:

Measurement Planning:

- Identify concrete (data) sources tailored to align with each of the goals from Principle 1 early on
- Measurement planning – including identification of tools and tracking methods, KPIs, and benchmarks – should be done in advance
- Measurement and evaluation must be individually tailored to
 1. align with the goals and objectives specified in Principle 1, including the consideration of audience;
 2. include context and realities of the project/program/campaign
- Outputs – tangible and intangible metrics/products that result from communication work (i.e. what is said/done/produced) in the delivery of content through a communication channel
- Outcomes – changes in beliefs, attitudes and/or behaviors (i.e. the change made)
- *More information can be found in the [AMEC Framework](#)*

Measurement Execution:

- *Outputs* alone are best interpreted as directional rather than absolute measures – it is always recommended to aim for measuring *outcomes*
- However, *outputs* do play an important role in helping to understand the holistic picture of communication effects
- Linking *outputs* and *outcomes* to the wider context is key to telling a meaningful and credible story
- Ongoing, holistic evaluation of *outputs* and *outcomes* across the audience journey is the key to successful measurement and evaluation
- Measure frequently, measure each audience touch point across the journey, put it all into context and (re)evaluate the meaning behind it

Principle 3

Where we are today:

Outcomes and Impact Should Be Identified For Stakeholders, Society, & the Organization

Where we went in 2015:

The Effect on Organizational
Performance Can and Should Be
Measured Where Possible

Where we started in 2010:

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

What To Do:

There is no one right way to measure the societal or organizational impacts of communication, but you should consider the following :

- Determine the relevant societal and organizational impacts you want to measure. This should include thinking beyond sales and services provided, such as impact on employee retention, lead generation, or change in behaviors or attitudes
- Include exploring how communication efforts affect society or the organization. A working hypothesis on how communication actually impacts society or your organization should be established as part of the goal setting process
- When considering organizational performance, communication can and should impact brand reputation. Gathering quantitative and qualitative metrics around reputation is key to understanding communication impact on reputation (e.g. sentiment analysis of social media and internal channels, in-depth interviews and focus groups with stakeholders; document analysis)
- Data availability is often the hardest part of measuring impact. Be prepared to talk with internal and external data sources. Where possible, metrics that highlight quality, and not just quantity, of communication should be considered during analysis
- It is important to factor in the role other marketing, communication or other organizational programs have on organizational goals. Where possible, analysis should isolate the impact of communication from the other marketing tactics (e.g. through regression analysis), and reporting should provide realistic context to what the role of communication plays in your organization
- Effective analytical approaches often show that most communication dimensions are relatively more and less effective. The proper application of Principle 3 often entails helping drive strategic decisions about how best to allocate communication resources to drive organizational performance

Principle 4

Where we are today :
**Communication
Measurement and
Evaluation Should
Include Both
Qualitative and
Quantitative Analysis**

Where we went in 2015:
Measurement and Evaluation
Require Both Qualitative and
Quantitative Methods

Where we started in 2010:
Media Measurement Requires
Quantity and Quality

What To Do:

- Measuring and evaluating communication requires tracking and evaluating both quantitative and qualitative measures across channels. Fundamentally, we're trying to assess how communication reached and engaged target audiences, if messaging was communicated via our channel strategy/approach, and what our target audiences took away as a result
- The application of quantitative and qualitative analysis should be specific to the target audience you are trying to engage and be grounded in the goals you've set for your program. Evaluation should account for:
 - Reporting and analysis of **Quantitative** metrics such as:
 - For cross-channel research: Impressions or reach among target audiences, competitive or sector share of voice, engagement with earned/owned/paid content across channels, and sharing of earned/owned/paid content across channels
 - For audience survey-based research: Awareness, recall, message/ content relevance, perception/ attitude change, expected behavior change
 - Reporting and analysis of **Qualitative** metrics such as:
 - For cross-channel research: Sentiment and/or emotional response from target audiences, credibility and relevance, message delivery, calls to action, third-party endorsements, inclusion of company spokespeople, and prominence as relevant to the channel
 - For audience survey/ interview/ bulletin board-based research: Ethnographic insights, underlying motivations, rationale, perceptual context, style/ language impact

Principle 4 ..continued

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What To Do: (continued)

- Remember that we are measuring results and progress, not necessarily success
 - Quality measures can be negative, positive, or neutral
- Communication measurement and evaluation should be done consistently over time to gauge trends in quantitative and qualitative performance to identify drivers and context of results (i.e. the why behind the what) and implemented into future communication planning efforts
- Apply the right mix of quantitative and qualitative research methods to assess the results, quality and impact of communication, including, but not limited to:
 - Cross-channel monitoring tools to capture earned media content over time, and to aggregate and categorize
 - Paid and web analytics tools to assess engagement and action among audiences
 - Leverage natural language process and AI for qualitative measures such as sentiment, broad emotions and topics, and calls to action
 - Human-led content analysis for softer measures such message delivery or themes
 - Audience surveys, interviews, or bulletin boards
- Remember, all tools, methods and approaches should be vetted to understand limitations and relevant applications
- For some target audiences, consider qualitative methods to better explain the quantitative (or to replace, in some cases)

Principle 5

Where we are today: **AVEs are Not the Value of Communication**

Where we went in 2015:
AVEs are Not the Value of
Communication

Where we started in 2010:
AVEs are not the Value of
Public Relations

What To Do:

- If you must make a comparison between the cost of space or time from earned versus paid media, use:
 - Quality of the coverage (see Principle 4), including negative results; and
 - Physical space or time of the coverage related to the portion of the coverage that is relevant
 - Clearly and transparently define the metrics that are being used

What Not To Do:

- Do not use Advertising Value Equivalents (AVEs), a flawed measure that calculates the *eventual* cost of the size of the coverage gained
- Do not mislead or misrepresent values to stakeholders
- Do not use multipliers for “pass-along values” for earned versus paid media (unless proven to exist)
- Do not replace AVEs with any other similar flawed metrics; costs are not the value of communication
- There are 22 reasons to say no to AVEs:
<https://amecorg.com/2017/06/the-definitive-guide-why-aves-are-invalid>

Principle 6

Where we are today:
Holistic communication measurement and evaluation includes all relevant online and offline channels

Where we went in 2015:
Social Media Can and Should be Measured Consistently with Other Media Channels

Where we started in 2010:
Social Media Can and Should be Measured

What To Do:

- Integrate different communication channels to make sure you are measuring holistically and cross-channel, as it relates to the audience/customer journey
- Measurement and evaluation should be deployed consistently across all applicable communication channels by collecting data and analyzing performance. Such channels include, but are not limited to:
 - Online and Offline Earned Media Content
 - Owned Social Channels (Twitter, Facebook, Instagram, YouTube, Snapchat, Pinterest, etc.)
 - Owned Websites and Microsites
 - Organic and Paid Search
 - Paid Advertising (Programmatic, Display, etc.)
 - Surveys, Interviews, Bulletin Boards
 - Events
 - Influencers (Paid and Earned)
 - Email Marketing
 - Ecommerce, Sales and CRM
- Make sure you are up to date on what each channel and tool (for tracking) can do to make sure you are collecting data as thoroughly and as accurately as possible
- Define clear goals and outcomes consistently across channels
- Evaluate the quality and quantity of all digital channels (just like with conventional media)
- Go beyond "coverage" or vanity metrics such as "likes" and "impressions" to have a better understanding of the target audience ecosystem by focusing measurement on engagement, conversion, perception/attitude change, consideration, and purchase intent/behavior change

Principle 7

Where we are today:

**Communication
Measurement and
Evaluation Are
Rooted in Integrity
and Transparency to
Drive Learning and
Insights**

Where we went in 2015:

Measurement and Evaluation
Should be Transparent,
Consistent and Valid

Where we started in 2010:

Transparency and Replicability
are Paramount to Sound
Measurement

What To Do:

- Ensure integrity, honesty, openness and ethical practices. This includes upholding data privacy regulations such as GDPR, and educating clients on issues of data ethics, privacy, and compliance
- Ensure that measurement practices are transparent, valid, and replicable. Document data sources, analysis methodology, and any relevant variables that could have affected results or key findings
- Use measurement and evaluation to drive insights and learning. Data alone is not enough; focus on insights that can inform strategic thinking and evidence-based decisions. Learn from both success and failure
- Recognize any potential biasing effects in:
 - Human bias
 - Client bias
 - Sample bias
 - The research itself
 - Broader societal context
 - Artificial intelligence and algorithms

THANKS TO OUR STRATEGIC PARTNERS



ICCO

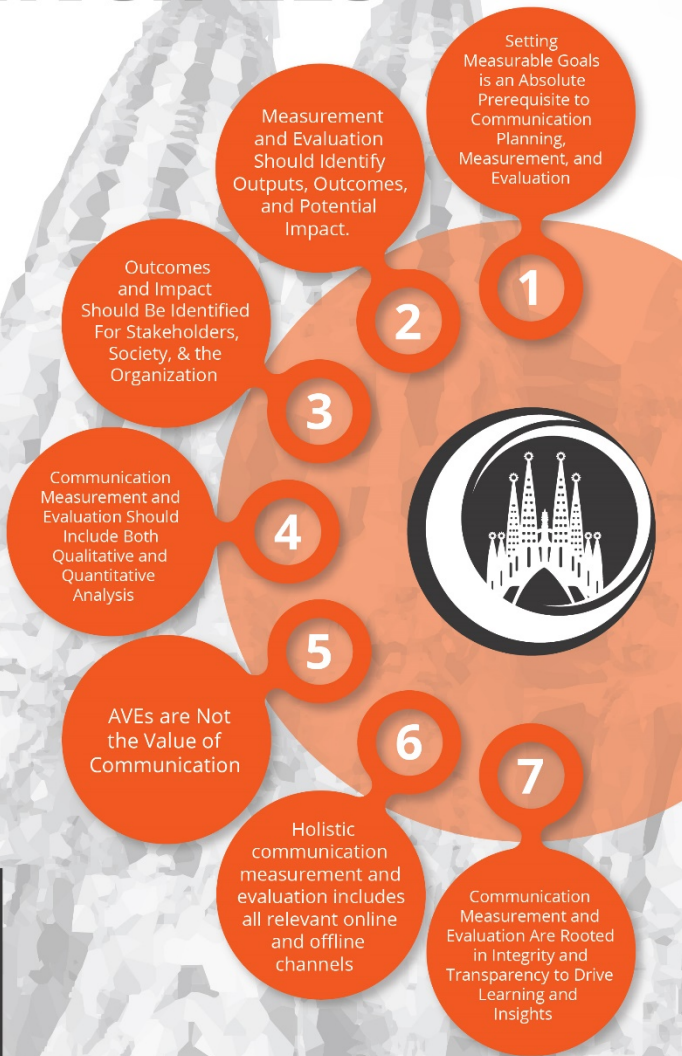
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BARCELONA PRINCIPLES 3.0



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‘Over the past ten years, the Barcelona Principles have transformed the evaluation landscape. AMEC’s work here has been of inestimable value to the PR and communications profession, and it has been ICCO’s and the PRCA’s great honour to have been partners in this work. We warmly welcome and endorse the Barcelona Principles 3.0, as the latest evolution of AMEC’s mission. Any PR practitioner who believes in the future of our industry should embrace these Principles, and put them at the heart of the work.’

Francis Ingham MPRCA, PRCA Director General and Chief Executive of the International Communications Consultancy Organisation (ICCO).

‘As the communication industry continues to evolve and set higher standards, so does the measurement and evaluation field through the AMEC Barcelona Principles 3.0. The Institute for Public Relations is proud to support this third release that has increasingly demanded our industry upgrade our standards to ensure integrity, validity, and transparency through a holistic commitment to ethical, valid measurement practices.’

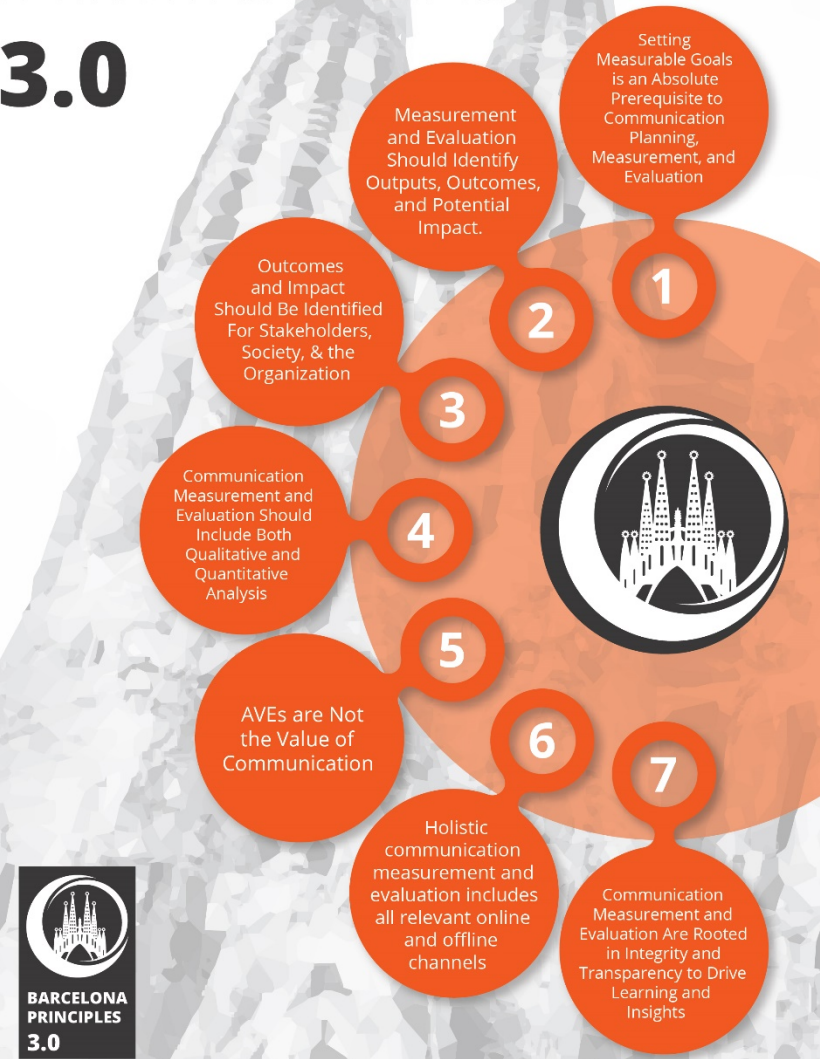
Tina McCorkindale, Ph.D., APR, President and CEO, Institute for Public Relations



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‘The revised principles are a significant step forward for professionalism in communication measurement and evaluation. Great work by AMEC!’

Dr Kevin Ruck, Co-founder, PR Academy.

‘As measurement tools become ever more sophisticated it is timely for AMEC to review the Barcelona Principles and ensure that they meet the needs of the clients we serve. We welcome this fresh thinking and are confident that the revised principles will support the work of our members as they devise their strategies and campaigns.’

Alastair McCapra, Chief Executive, the Chartered Institute of Public Relations

‘As one of the original partners and ongoing advisers in developing the Barcelona Principles, we welcome and enthusiastically support the 2020 refresh,’ said Philip T. Bonaventura, Interim Chief Executive Officer, PRSA. “This update recognizes and addresses the fact that effective measurement practices are constantly evolving and need to stay in sync with the development of new trends, products and social media networks. We look forward to continued collaboration with AMEC and our colleagues across the international communications community.’

Phil Bonaventura, Interim Chief Executive Officer, PRSA



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**THANK YOU
VERY MUCH!**

FOR MORE INFORMATION

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