PublicRelay

Communications in Context:

Media Trends & Insights

Benchmark Q1 2022

Contents

Introduction

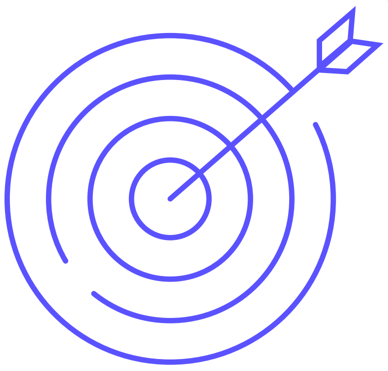
How do you evaluate your communications work?

Do you base it on your team's performance from the previous quarter or year? Do you consider the performance of your top competitors?

What about the leading communicators of prominent brands outside of your industry?

Your company's other departments use benchmarking, a form of comparative analysis, to set standards based on the highest levels of achievement.

And, because it involves identifying and measuring world-class performances across multiple industries, benchmarking enables you to learn from best practices and set aspirational goals rooted in data.



That's why it's considered a fundamental practice for encouraging continuous improvement and gaining a competitive edge.

But assessing communications requires more than a knowledge of other companies' results.

Understanding the PR Landscape

Your communications team doesn't operate in a vacuum.

Current events and social issues influence the impact and reception of your communications. But it can be challenging to understand and predict how.

With benchmarking, you can gain context and insight into the stories, topics, and events that are shaping the wider PR landscape by asking:

What are the events or social issues influencing your audience?

How have different companies responded, and what was the reaction?

Only with this perspective can you set the right goals and accurately interpret the results of your PR work.

Benchmarking for Better Communications

So, why isn't benchmarking used more widely by communicators?

Most of the benchmarking research available is built on the interests and goals of your company's other departments, like Sales or Operations. The data just isn't relevant to communicators.

For truly relevant and valuable insights, you need **comprehensive benchmarking data tailored to communicators' unique objectives.**

Introducing the PublicRelay Benchmark

At PublicRelay, we've designed a benchmark with communicators at its center. This means focusing on the metrics, concepts, and outcomes communicators care about most at every stage of the research. Our benchmark highlights communications trends and provides actionable insights and suggestions that can help communicators improve their media reputation.

Launched in January 2022, the PublicRelay Benchmark is a continuous comparative media analysis of the world's leading brands.

It is comprised of a full media analysis of 35 companies across seven sectors:

- Automotive
- Corporate Finance
- Consumer Finance
- Technology
- Energy
- Food & Beverage
- Telecommunications

As they appear in 50 top publications.

And tagged with a set of 50+ topics and subtopics across six dimensions:

- Performance
- ESG
- Innovation
- Regulatory
- Products & Services
- Thought Leadership

We analyze content using the following metrics:

- **Volume of coverage** – the total number of mentions by industry, company, topic, or subtopic.
- **Tone** – the coverage sentiment (i.e., positive, negative, or neutral). Tone is applied on the company, topic, and sub-topic levels.
- **Social sharing** – the total number of Twitter shares an article received.

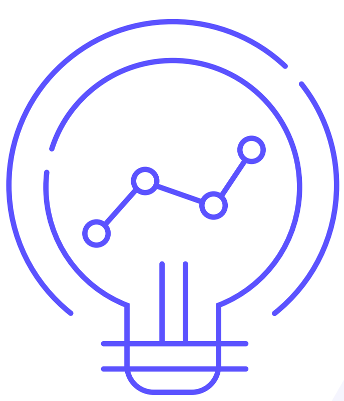
The research is analyzed and reported on a quarterly basis.

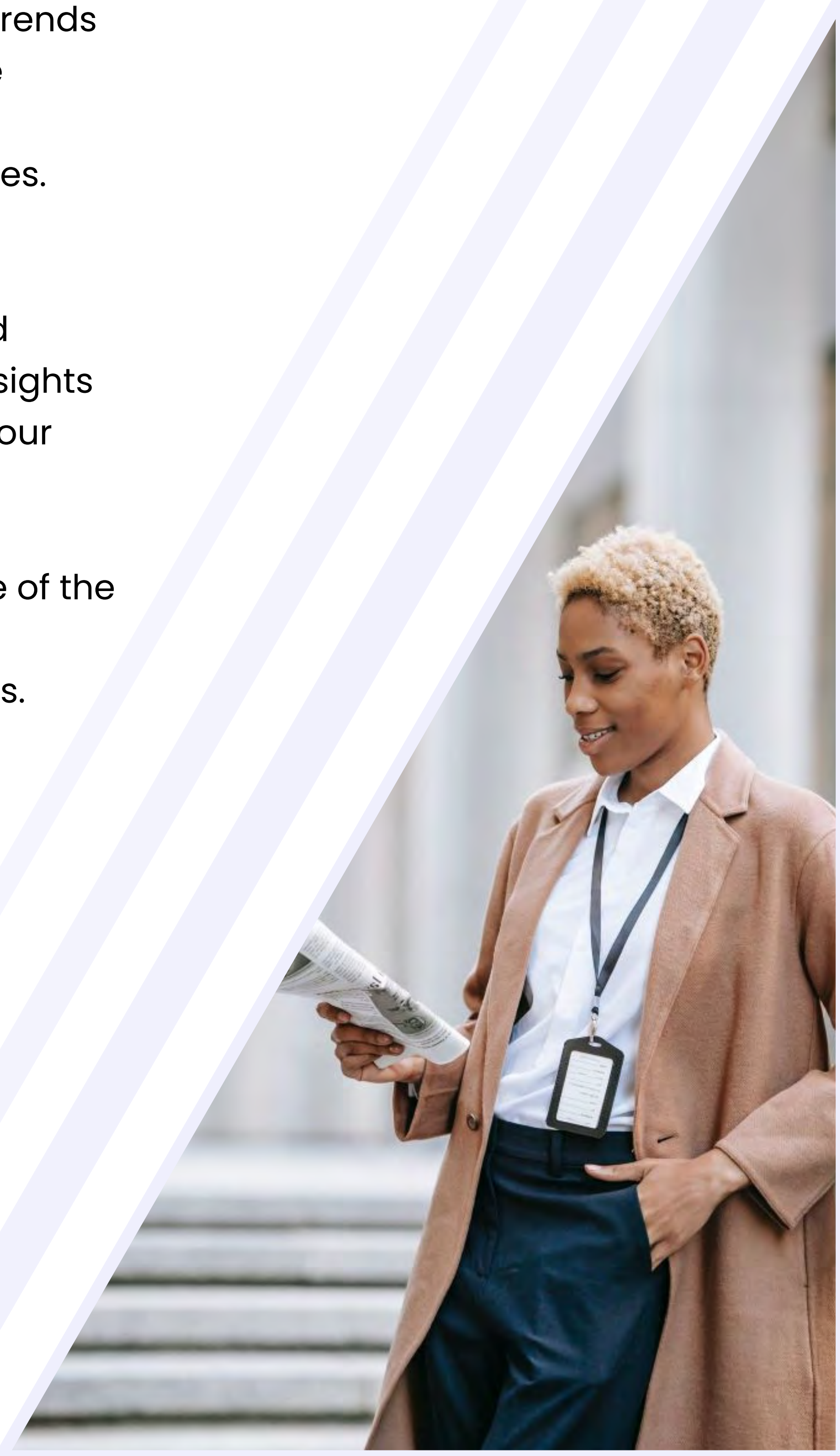
What is the PublicRelay Communications in Context Series?

Each quarter, we outline a few of the key trends emerging from the data that dive into the circumstances, media coverage, and PR strategies of the world's leading companies.

We highlight the best practices of top-performing companies in terms of earned media coverage, so you can use these insights to inform your strategy and benchmark your performance.

This white paper series provides a sample of the insights available in the full PublicRelay Benchmark report available to subscribers.



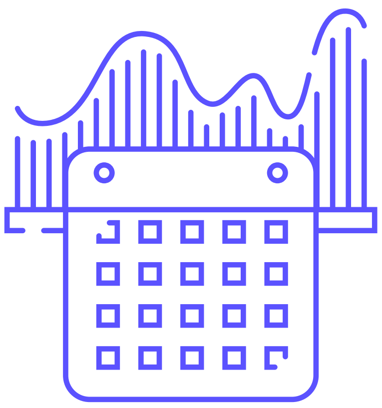


PR Landscape Q1 2022

A lot happened from January to March 2022.

The social issues and events of the quarter impacted various industries differently – some stories that affected one sector didn't generate any news coverage for another. When examining these events in the context of the wider PR landscape, it's crucial to note the more significant events of the quarter. In other words, the stories that touched companies from every sector and acted as catalysts for other topics to become salient points of discussion in the media.

Five topics received attention across all sectors in the Q1 2022 coverage cycle: COVID-19, supply chain issues, inflation, cybersecurity, and the Russia-Ukraine war. We've outlined the details of each topic's news coverage, the notable events that prompted mentions, and how the various themes are interconnected.



COVID-19

The pandemic has been a consistent feature of the global news cycle for the past two and a half years. But its prominence in media discussions and its role in brand perceptions continues to evolve.

For most of Q1, COVID-19 mentions primarily referenced workplace topics, with a low hum of coverage commenting on companies' return to office plans and workplace vaccine mandates throughout January.

The nature of the discussion shifted in March, as the media responded to China's COVID-19 lockdowns, the implications of which will be widespread, impacting supply chains and Inflation rates worldwide.

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Supply Chain Issues

Supply chain shortages and disruptions have plagued companies since the onset of the pandemic, as COVID-19 lockdowns led to factory shutdowns and manufacturing issues.

Low volumes of supply chain coverage at the start of Q1 reflected resumed business operations across most of the world.

However, two global events disrupted supply chains once again, and prompted media discussion over the ways in which industries will likely be affected:

In February, the Russia-Ukraine war set in motion a new wave of supply chain issues as energy companies ceased business with Russia, jeopardizing global oil supplies. The Russian invasion of Ukraine also threatens the supply of commodities produced in Ukraine, like wheat and aluminum.

In March, China launched its longest COVID-19 lockdown since the start of the pandemic. The halt to factory operations in China – where about 1/3 of global manufacturing takes place – has further disrupted supply chains.

Russia/Ukraine War

The Russia-Ukraine war was, without a doubt, the biggest news story of the quarter.

Mentions of the Russia-Ukraine war permeated every industry's coverage as companies made public statements on the conflict and many discontinued business operations in Russia.

While the conflict dominated the news cycle in the three weeks following Russia's invasion of Ukraine, coverage volumes dropped 86% below the peak by the end of March.

Inflation

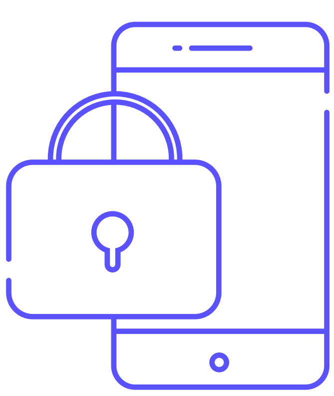
Inflation is the frequent aftershock of the other leading stories.

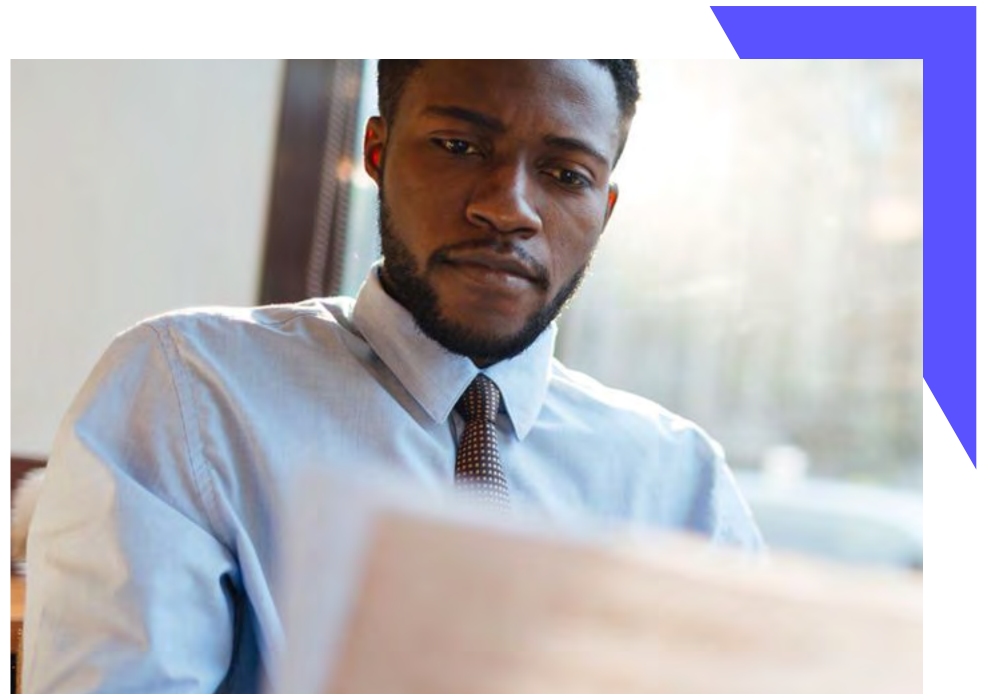
Because of COVID-19, governments provided relief funds and stimulus packages leading to increased consumer spending on products rather than services.

Both the pandemic and now the Russia-Ukraine war have prompted widespread supply chain issues, thereby raising the demand and cost of essential and luxury goods.

This combination of circumstances, among other factors, has led to companies from all sectors responding in various ways, including with price hikes.

Inflation coverage featured the price-hikes occurring in the energy, food & beverage, technology, and automotive industries, while telecommunications stood out for not raising consumer prices. It also cited the corporate and consumer finance sectors' commentary on the economy. Coverage peaked around earnings calls at the end of January, with media discussion of inflation's impact on companies' earnings reports.





Cybersecurity

As companies from all sectors grapple with data protection and privacy concerns, low levels of negative cybersecurity coverage – particularly among the tech industry – persisted throughout the quarter.

A notable jump in mentions coincided with the Russia-Ukraine war, as companies from all industries cut ties with Russia over the invasion, and the media discussed the heightened cybersecurity risks posed by the country.

Interestingly, the cybersecurity threat offered tech companies like Microsoft an opportunity to generate positive coverage of their efforts to protect users and organizations.

Q1 2022 Trends

With this context in mind, let's dive into the insights that emerged from Q1 media coverage and companies' communications strategies.

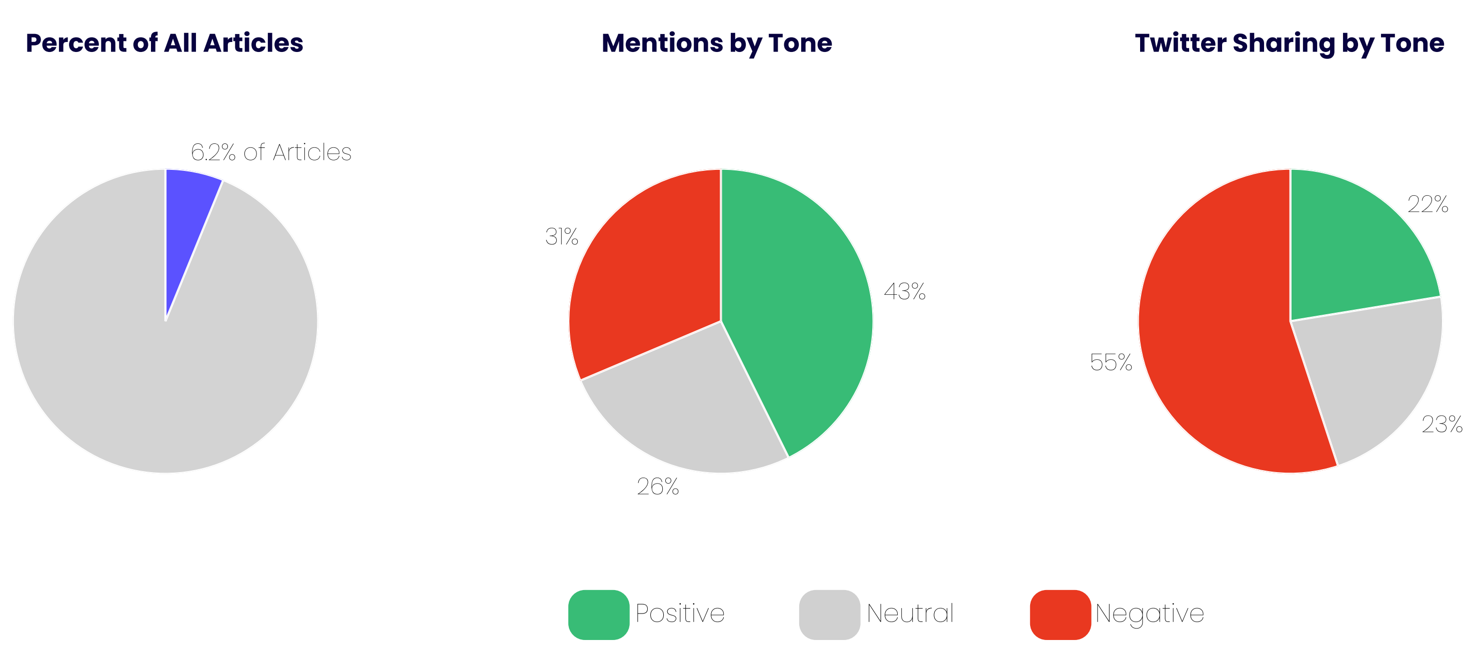
Greenwashing Accusations Amplified on Social Media

Negative environment coverage saw outsized social sharing of greenwashing callouts targeting communicators and companies' climate pledges not backed by measurable actions.

Though companies' environment media coverage was more positive overall, **negative mentions received 2.5 times more social sharing than positive stories.** The negative stories that received the most traction emphasized company "greenwashing" – a PR spin that makes companies appear more environmentally friendly than they actually are – or failure to meet self-imposed environment goals.

This rang true across all industries, particularly corporate finance.

Environment Mentions



The media blame PR professionals for greenwashing

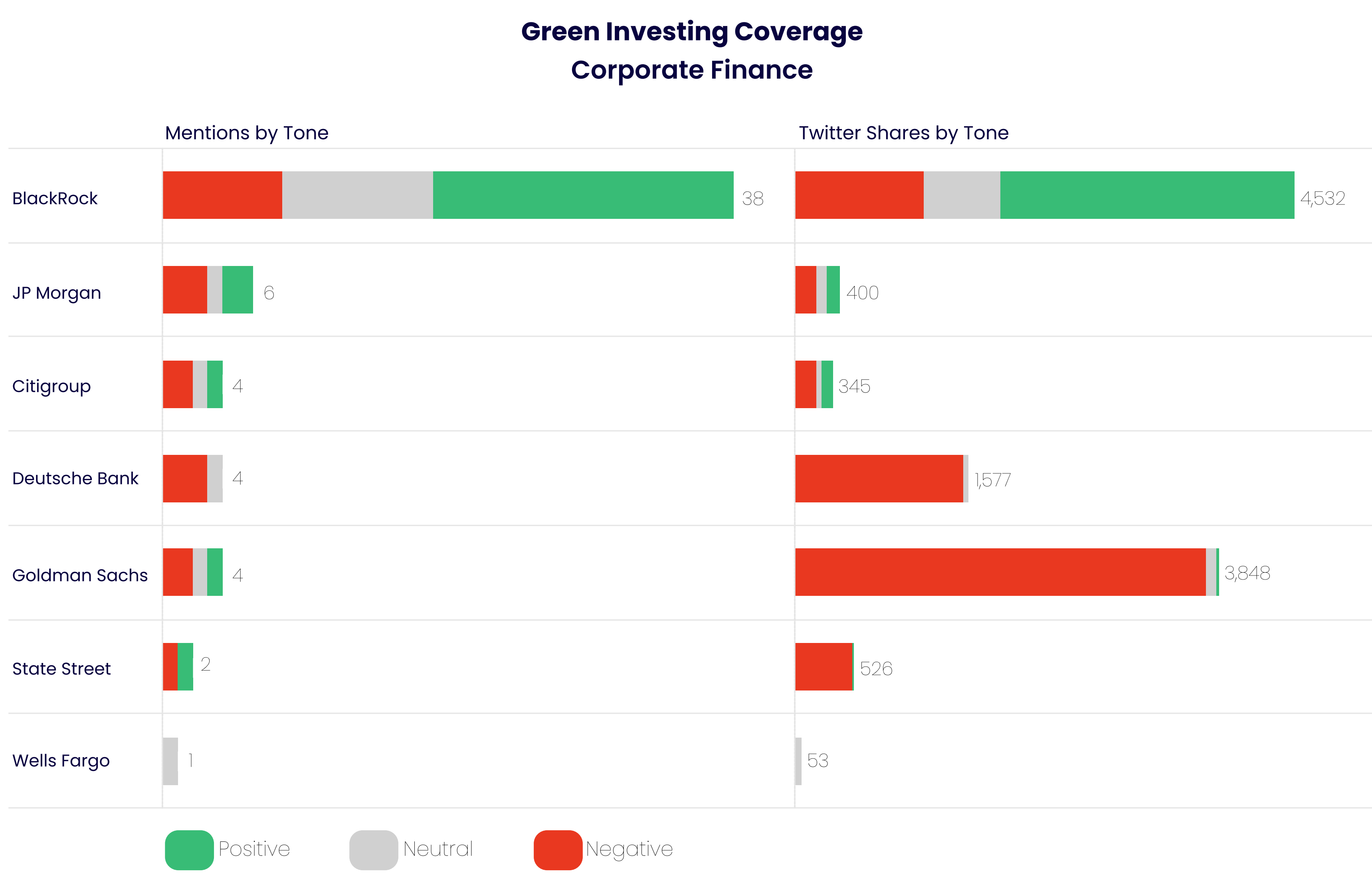
Let's look at the corporate finance industry more closely.

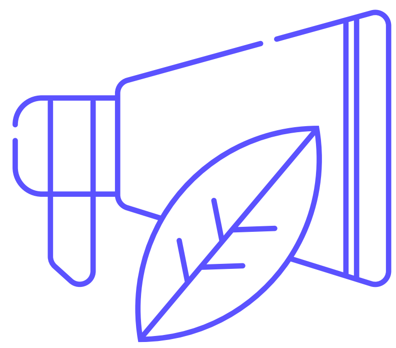
The media is paying more attention to these companies' green investing strategies than their sustainability efforts. However, green investing messages were often tied to greenwashing accusations, with outlets like *The Guardian* framing capital allocation to fossil fuel companies under the guise of sustainable investing as "deceptive."

Further, stories about institutional investors supporting the "greening" of fossil fuel companies faced criticism for undermining their climate pledges and misleading shareholders.

For instance, Goldman Sachs ran an ad campaign highlighting its support for sustainable finance and renewable energy despite lending $19 billion to fossil fuel companies. This was met with a considerable audience backlash as indicated by the significant social sharing of negative media coverage.

The impact of negative greenwashing narratives is undeniable: though negative stories account for only a third of corporate and consumer finance's environment coverage, **they receive 5x more sharing than positive mentions.**





The media also accused energy companies of greenwashing. In particular, company messaging that framed their efforts as a “green transition” without offering specifics of any actions taken was met with criticism.

Ultimately, the media blamed company greenwashing and climate misinformation on PR professionals. Outlets like *The Guardian* were critical of the role PR firms played in over-inflating companies’ environmental reputations compared with their tangible actions. In one article, the publication called out PR agencies by name, asserting that “climate fraud can’t happen without the help of the PR and advertising industry.”

Key Takeaways

Communicators will be at the forefront of the growing debate about green investing and greenwashing going forward.

So, how can you share your companies' environment messages while safeguarding against greenwashing accusations?

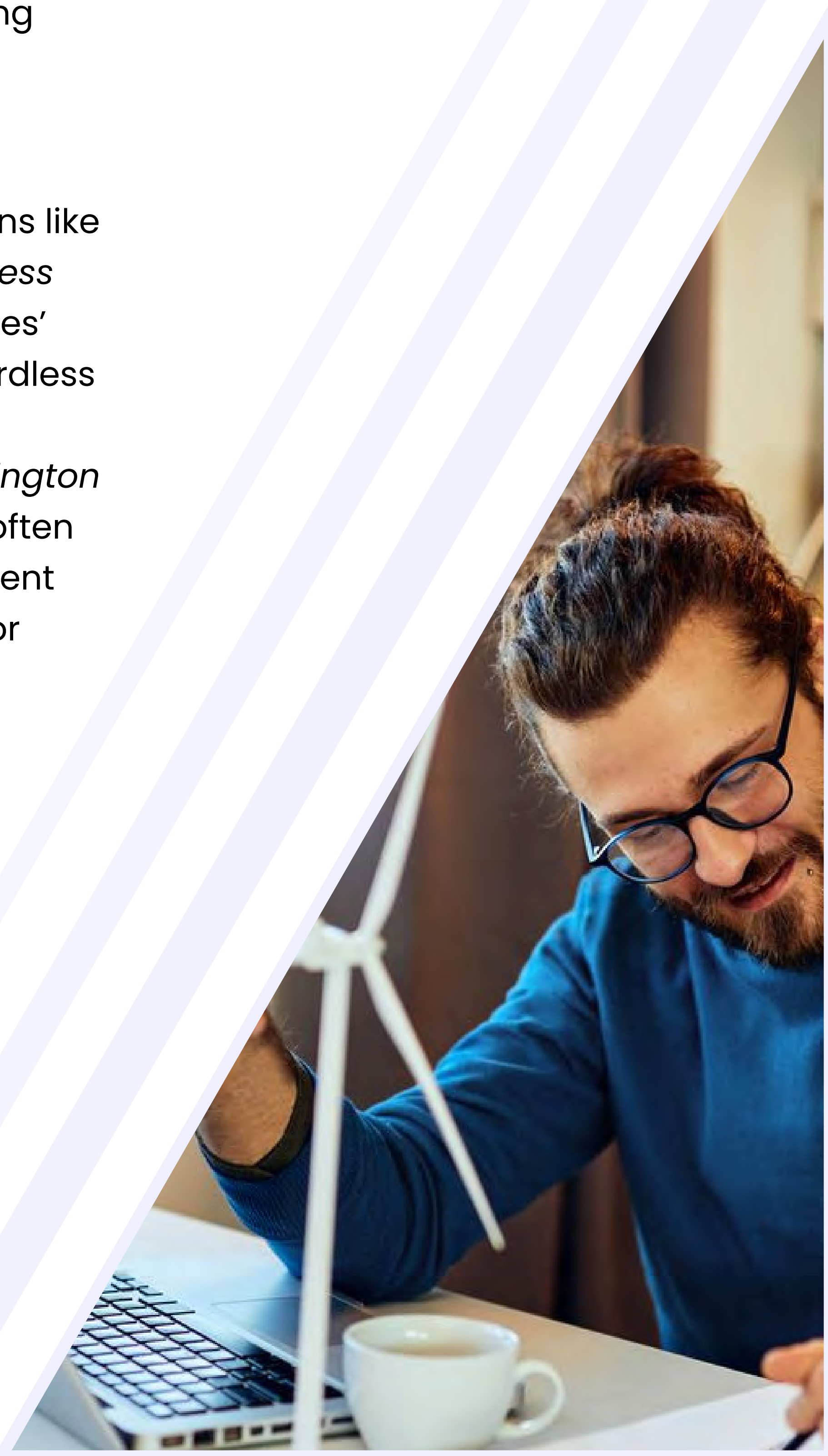
- **Incorporate your CEO in environment messages.**
  Not only were environment messages more positive when delivered by company CEOs, but it appears that CEOs are more effective in containing greenwashing risks than other company spokespeople. Further, negative coverage without a CEO mention produced **6x** more social sharing than negative coverage with a CEO mention. Because the media blames PR professionals for greenwashing, including your CEO in environment messages can add credibility and mitigate greenwashing accusations.

- **Focus on your company's concrete sustainability actions.**
  Positive mentions highlighting tangible actions can counter greenwashing accusations. Stories about companies' carbon capture projects and Scope 3 emission-reduction efforts with supply chain partners received positive coverage and made climate pledges more credible. Alternatively, vague climate pledges and future "greening" commitments faced criticism and greenwashing callouts.

- **Use positive environment stories as an opportunity to stand out from the crowd.**
  Companies in the energy and tech industries were often grouped together in low-quality environment mentions. There is an opportunity for individual companies to set themselves apart with positive coverage of their concrete climate actions or thought leadership. Take the corporate finance industry. In his annual shareholder letter, BlackRock CEO Larry Fink outlined his take on ESG investing and, though divisive, it positioned him as an Industry Thought Leader on the topic. As a result, BlackRock stood out amongst its peers with over **4x** more environment coverage than the industry average, and with more positive and fewer negative mentions.

- **Avoid relying on carbon offsets for messaging.**
  Where possible, feature other climate actions received more favorably as a part of your environment campaigns. The media negatively frames carbon offsets used as a remedy for the greenhouse gas emissions a company produces elsewhere in its operations. Authors frequently note environmentalist opposition to carbon offsets, which led to highly shared negative coverage mentioning companies using them.

- **Pitch your environment stories to business-focused outlets.** Publications like *Forbes, Wall Street Journal,* and *Business Insider* consistently covered companies' environmental efforts favorably, regardless of the industry. On the other hand, publications like *The Guardian, Washington Post,* and *New York Times,* which are often more critical of companies' environment reputations, provide an opportunity for positive relationship-building.



Tech Draws Bulk of DEI Criticism

Technology companies and Tesla account for 85% of all DEI mentions, with an emphasis on negative coverage surrounding racial issues. Microsoft and Apple are the tech outliers with positive coverage of their workforce transparency and diverse hiring practices.

Companies from all sectors faced calls for increased workers' rights and flexible return-to-office policies amid a widespread talent shortage. However, Diversity, Equity & Inclusion dominated coverage and social sharing compared to other workplace topics.

And, though every industry received DEI mentions – over 50% of which were negative – technology companies and Tesla combined accounted for 85% of all DEI coverage.

So, what was it about the tech industry and Tesla that captivated media and audiences' attention on DEI?

Negative stories about race drove social sharing

Most of the DEI criticism companies faced highlighted racial discrimination (76%), particularly first-person accounts of racism. Most notably, Tesla's negative DEI coverage was predominantly due to the 40 employee lawsuits against the company over racial harassment at its factories.

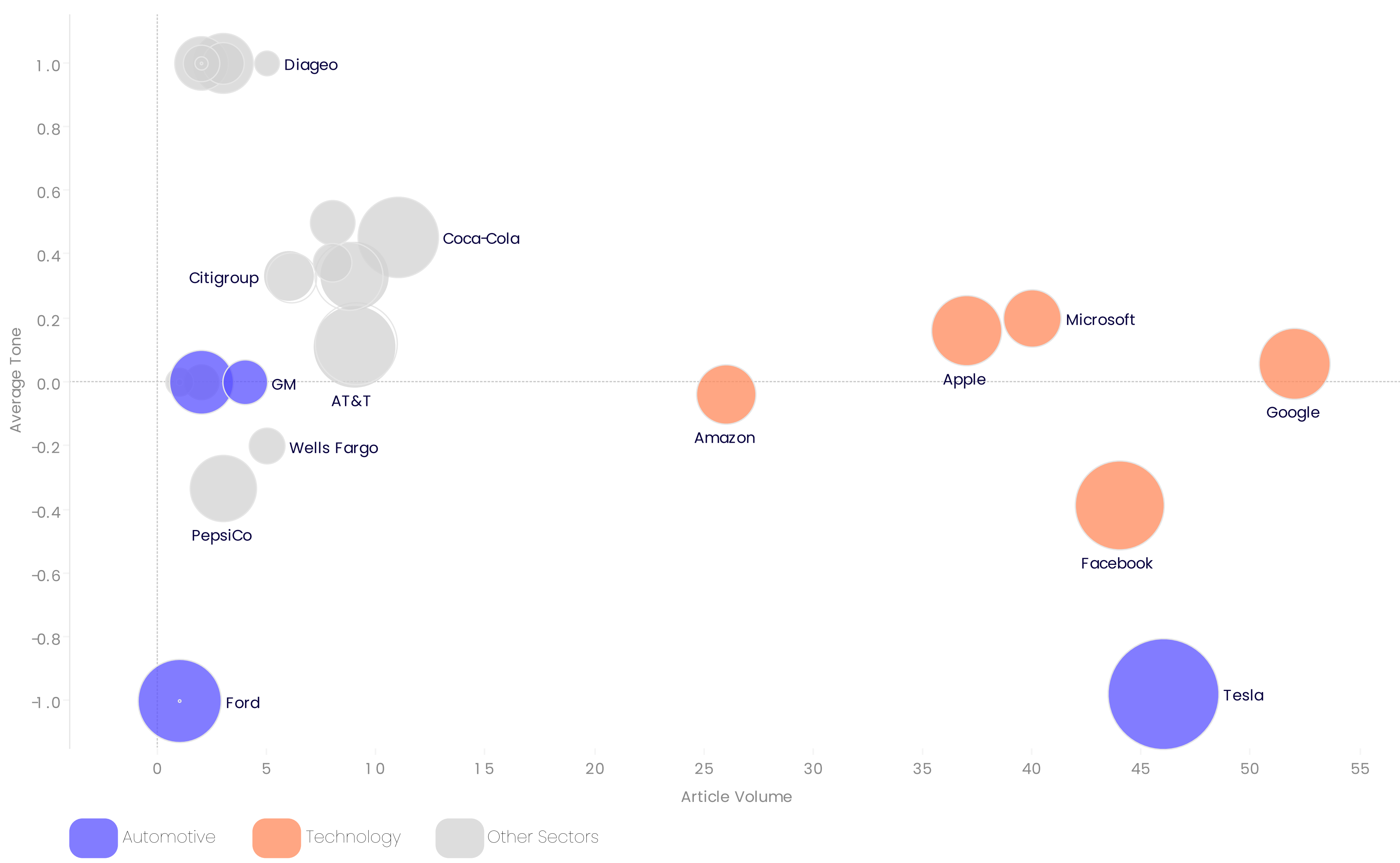
A closer look at the tech industry shows that about a third of the sector's DEI mentions negatively cover the insufficient representation of women and people of color at big tech companies.

And bad DEI press has consequences. **A negative DEI mention drove 6x more social sharing on average than a positive one**, regardless of the industry. Such outsized social engagement indicates that audiences care far more about the negative stories.

But what about tech's DEI outliers, Microsoft and Apple? The two companies have emerged as sector leaders with favorable coverage of their workplace transparency, diverse hiring practices, and efforts to build more inclusive products.

Article Volume, Average Tone, and Average Twitter Shares by Company

X-Axis = Article Volume Y-Axis = Average Tone Size = Average Twitter Shares



Gender and racial inclusivity initiatives prompted positive coverage

Companies' **gender-focused initiatives accounted for 54% of positive DEI stories**, compared with mentions of racial inclusion at 33%. Google and Apple led the way with coverage highlighting women in leadership, progressive parental leave policies, and gender-inclusive products.

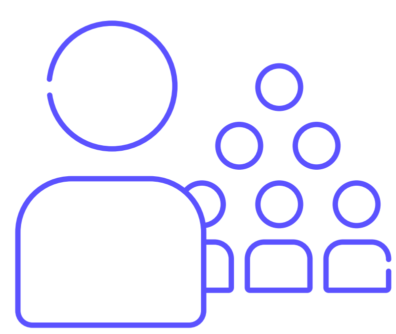
Interestingly, few companies approached the topic with proactive messaging about dismantling company racism, even though **positive stories about racial inclusivity received 26% more social sharing than other positive DEI mentions.**

Key Takeaways

When it comes to companies' workplace reputations, the media and audiences care most about DEI topics, particularly issues of race and gender. While race-related mentions drove negative coverage and sharing across all industries, initiatives to promote gender inclusivity provided an opportunity for positive mentions. However, the blow of negative coverage far outweighed the impact of positive stories, generating significantly more social traction.

So, what does this mean for your DEI strategy?

- **Focus on tangible actions to reduce racial discrimination.**
  Every industry was affected by stories of racial discrimination, which dominated negative DEI coverage. Communicating your company's tangible solutions to racial discrimination in the workplace is an opportunity to differentiate yourself.

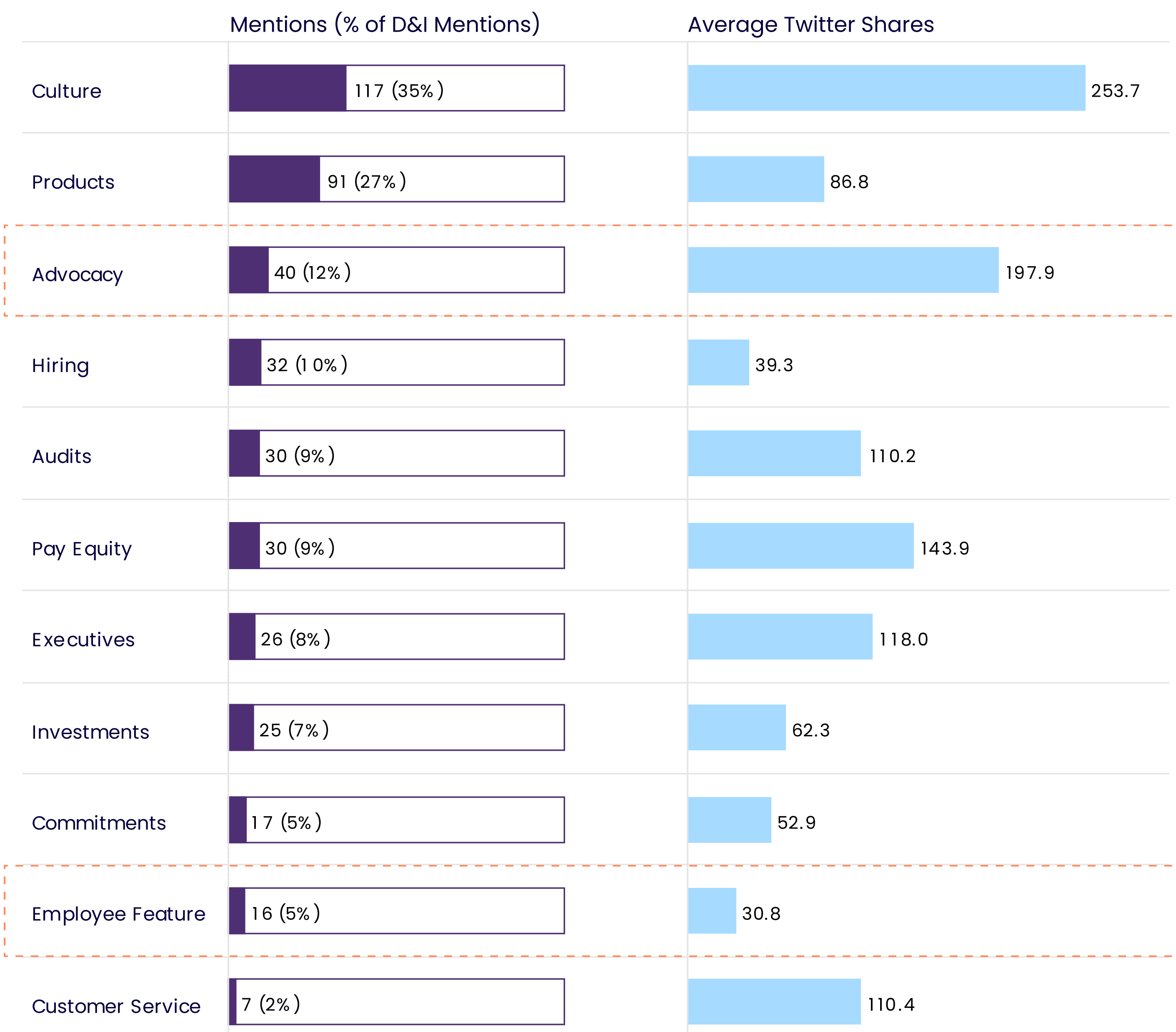


- **Highlight efforts to diversify leadership.**
  Positive coverage of companies appointing diverse executives was among the most shared topics. Not only is it perceived as a tangible action towards racial inclusivity, but it also adds credibility to brands' DEI commitments.

- **Avoid employee features and vague commitments.**
  Neither employee features nor company commitments to racial inclusivity resonate with the media or audiences unless backed by tangible actions internally.

- **Take a public stance on external DEI issues.**
  The media rewards brands that participate in national conversations on DEI issues. And, whether positive or negative, companies' public stances on topical social issues like LGBTQ+ laws and abortion rights had the highest average social sharing of any DEI topic.

Diversity, Equity & Inclusion Subtopics



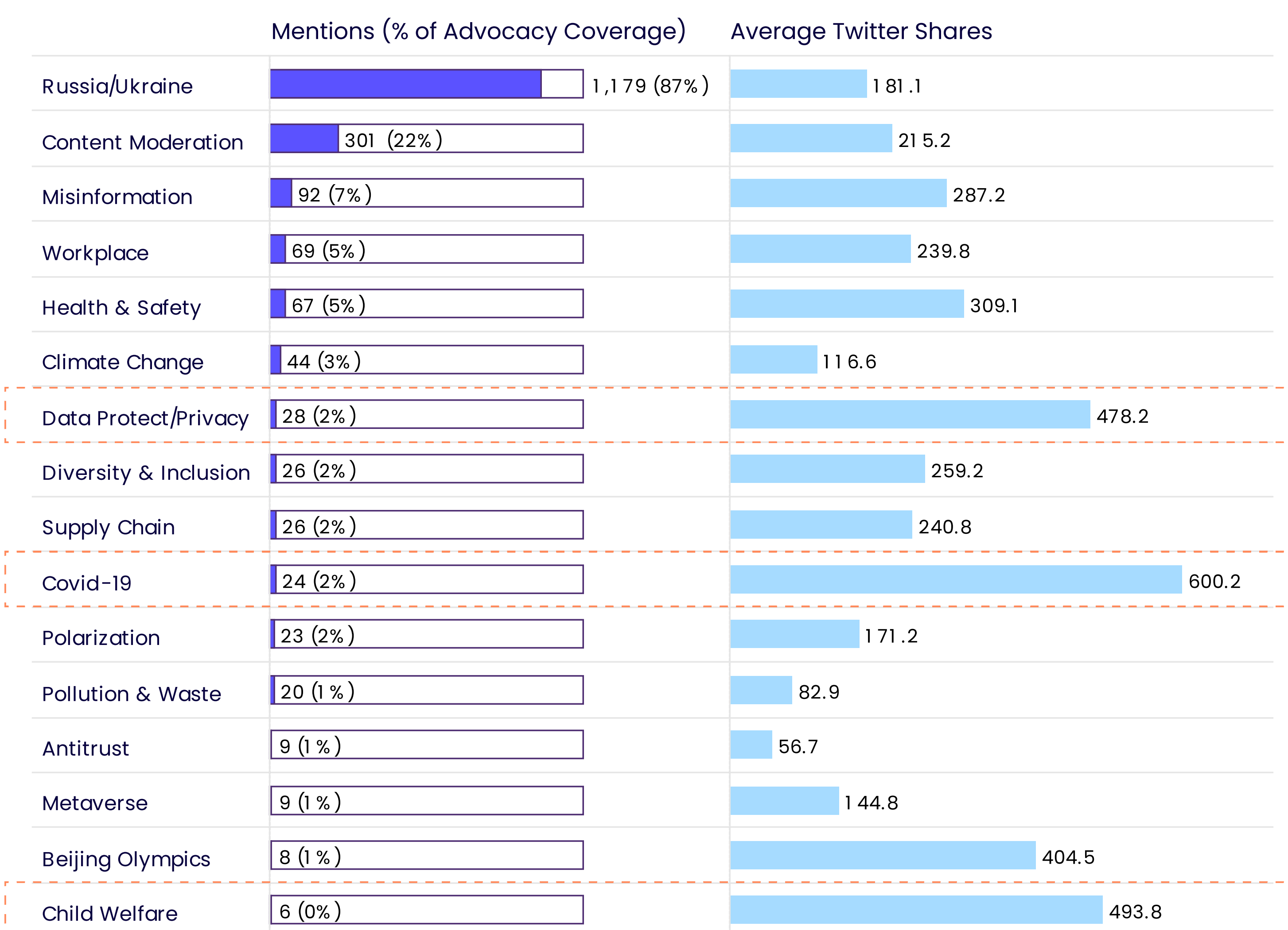
Taking a Stand Pays Off

Corporate stances on the Russia-Ukraine conflict drove advocacy coverage in Q1, but companies' public positions on consumer-focused topics earned more positive social sharing.

While the media cares about geopolitical advocacy, audiences care most about corporate advocacy targeting issues that directly impact consumers.

Positive consumer-oriented advocacy stories – like those about COVID-19 vaccinations and child welfare – gained more social sharing than positive mentions of companies' responses to the Russia-Ukraine war or China's human rights violations.

Advocacy Subtopics



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Brands' public stances on data protection and privacy, and LGBTQ+ issues, for example, also generated outsized social sharing. Meanwhile, advocacy coverage of intangible issues like climate change and waste conservation didn't resonate with audiences, highlighted by their low sharing average relative to other advocacy topics.

Interestingly, the Russia-Ukraine war garnered the most advocacy coverage across all industries, with predominantly (96%) positive or neutral mentions. However, despite its volume, this coverage received relatively low social engagement.

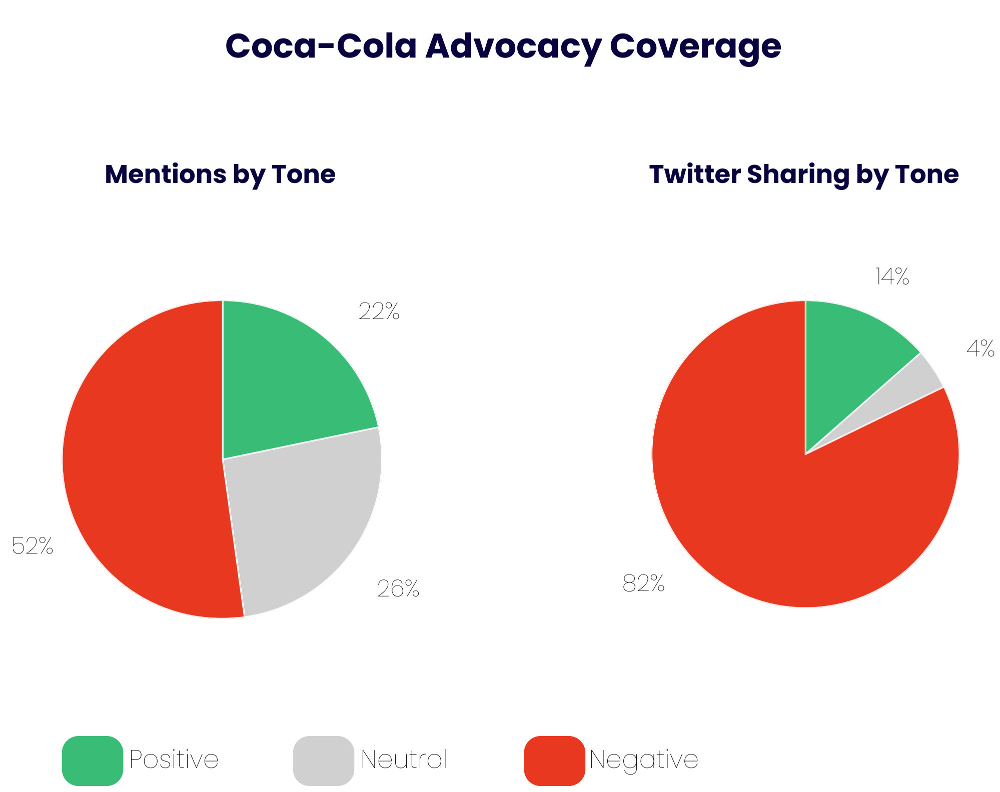
But this doesn't mean companies can ignore geopolitical issues altogether.

Negative geopolitical advocacy mentions were amplified on social media

For every sector, negative coverage of companies' responses to geopolitical issues in China and the Russia-Ukraine conflict received notable social media sharing. Further, the media equated companies' lack of a decisive message on these topics with support for those countries' policies. In other words, neglecting to vocalize a public stance on geopolitical issues resulted in negative press.

And such **negative stories**, particularly of a lack of advocacy or continued operations in China and Russia, **received 3x more sharing than positive mentions.**

For instance, Coca-Cola's sponsorship of the Beijing Olympics sparked negative advocacy coverage after the company failed to comment on China's ongoing human rights violations against Uyghur Muslims. These mentions, which criticized Coke's silence as incompatible with its publicized values of inclusivity, contributed to the outsized social sharing of the company's negative advocacy coverage.



Key Takeaways

Corporate advocacy coverage poses both an opportunity and a risk.

Here's how you can tailor your strategy to take advantage of the topics audiences care about while protecting your brand against harmful coverage:

- **Focus the bulk of advocacy messaging on consumer-focused topics to boost positive coverage and sharing.**
  Corporate advocacy is an opportunity for positive coverage on topics directly impacting consumers (e.g., COVID-19 measures, data protection, child welfare, etc.). Although advocacy on topics like climate change and regulation receive positive press coverage, they consistently generate less social traction.

- **Be sure to vocalize your stance on geopolitical issues to avoid reputational damage.**
  While positive news of advocacy on geopolitical issues like the Russia-Ukraine war or China may not receive the same social amplification as consumer-oriented issues, NOT taking a public stance on or halting business operations in those countries received highly shared negative coverage. The media is critical of companies' business operations in controversial markets, and these negative stories tend to amass more social engagement.

Socially Aligned Privacy Values Resonate

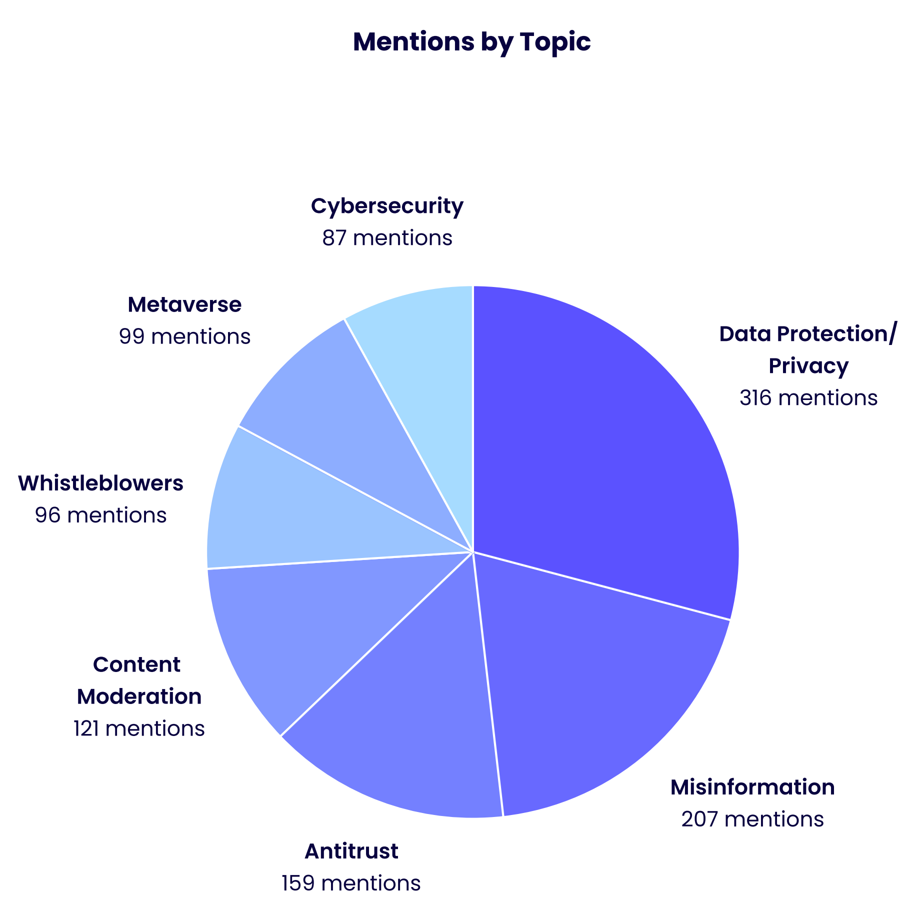
Data protection and privacy topics drove tech companies' negative coverage of social issues. Apple emerged as the industry leader with a pro-privacy stance and primarily positive coverage.

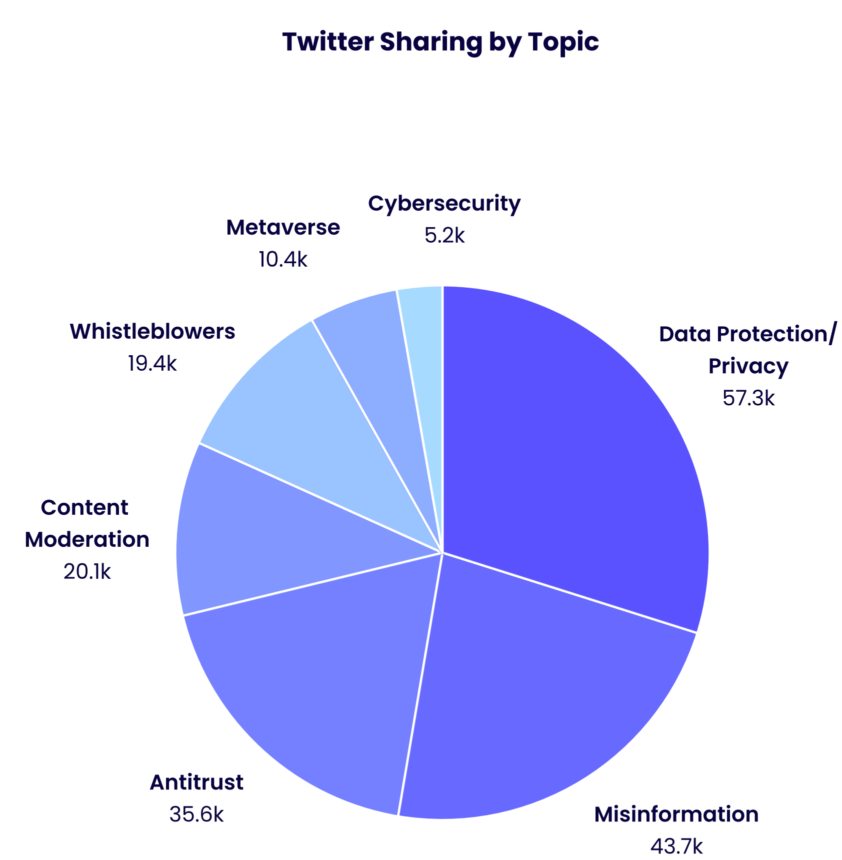
The tech industry's negative social impact led audiences to favor increased regulation of the sector. This is particularly true of companies' approaches to data protection, privacy, and content moderation.

Both the media and audiences are highly critical of the industry's approach to these topics, with **coverage containing antitrust messages receiving 2.5x more social engagement when mentioned alongside a negative social concern.**

But the criticism is not affecting all companies equally.

Technology Industry Negative Social Coverage





A pro-privacy stance mitigates the impact of negative coverage

For more context, let's examine the starkest contrast in performance: Meta vs. Apple.

Meta's privacy mentions are overwhelmingly more negative (71%) than positive (4%). Meanwhile, Apple has achieved a more balanced narrative of negative (23%) to positive (21%) privacy coverage.

Both companies are grappling with the same media and social landscapes. So, what are they doing differently in their communications?

First of all, Apple adopted a pro-privacy position that has set it apart from the rest of the sector.

For example, in 2021, Apple implemented privacy restrictions allowing users to opt out of app tracking, even though it threatened tech companies' ad revenues.

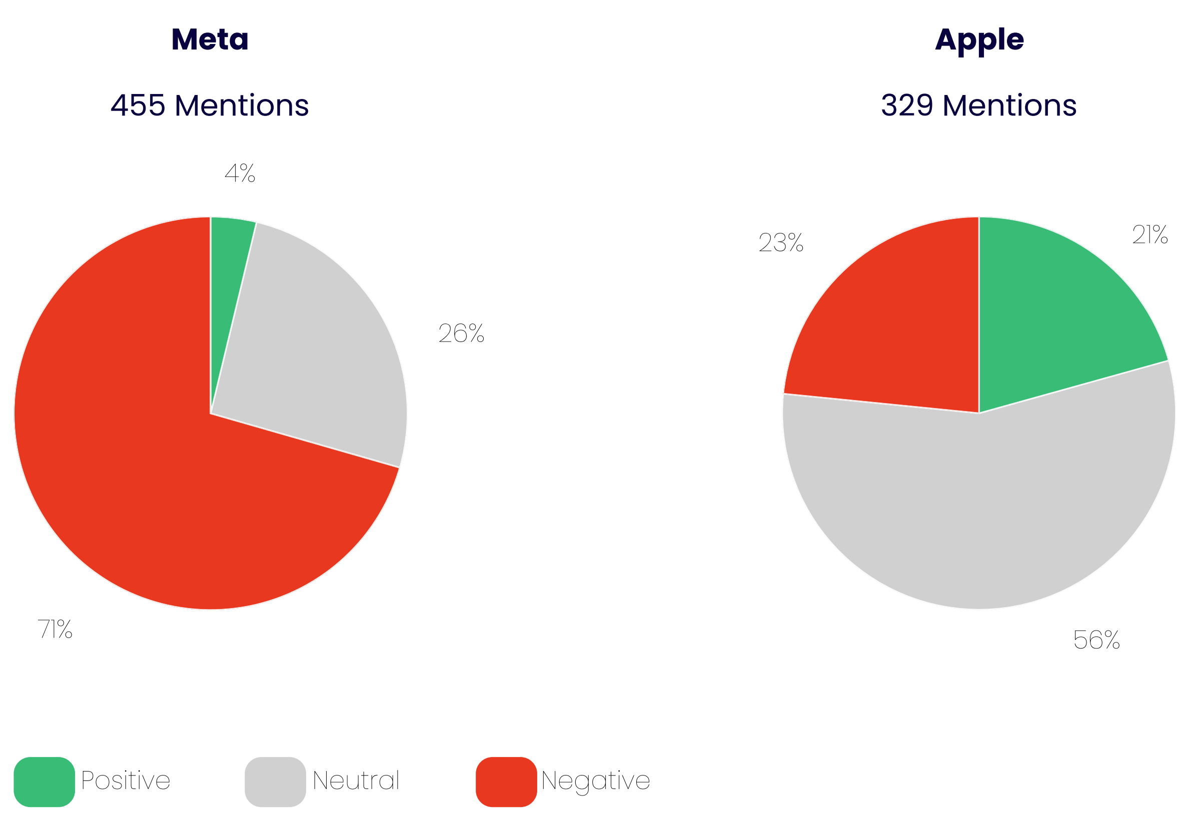
In Q1 2022, Google followed suit, while Meta chose to fight against the privacy restrictions. This move led to a dramatic drop in Meta's share price, followed by significant media criticism.

Meta is also frequently on the defensive with privacy litigation, featuring ongoing lawsuits against Facebook for using facial-recognition technology without users' consent, violating several states' privacy laws.

Unlike Meta, Apple's privacy-first messaging enabled the company to weather related reputational risks and manage criticism over product issues, like stalkers' exploitation of its AirTag tracker.

Perhaps most importantly, Apple's privacy stance is backed by policies and tangible product actions that add credibility to its pro-privacy reputation.

Mentions by Company



Key Takeaways

Data protection and privacy are no longer concerns unique to the technology sector. Every other industry is now positioned to acquire consumer data and will likely face similar reputational risks.

So, what can you learn from the tech industry's approach to data protection and privacy topics?

- **Consider socially aligned stances on data protection and privacy topics.** The tech industry is facing a social reckoning, with audiences approving of antitrust messages as a result. While defensive reactions to privacy restrictions threaten favorability and consumer trust, brands can differentiate themselves and protect against reputational damage by proactively adopting a pro-privacy stance and a commitment to improvement. Case in point, Apple's pro-privacy stance set it apart from its tech peers, with 40% of the company's positive privacy coverage commenting on Apple's healthy relationship with its consumers.

PublicRelay

Benchmarking For a Competitive Edge

When benchmarking is built around communicators, it yields a nuanced perspective on the PR landscape and what it means to perform well.

With the PublicRelay Benchmark as a part of your PR measurement arsenal, you can learn from the communications of the world's top companies, set the standard for your KPIs, and reliably evaluate your PR work.

Start measuring yourself against the best and elevate your communications today.

At PublicRelay, we use human-augmented technology to perform accurate and reliable analyses and provide you with the best possible quality data to inform your communications.

To **read the full Q1 2022 report** or learn more about how **benchmarking can support your communications strategy**, get in touch with our team at solutions@publicrelay.com.

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