Identification and mapping of publics in public relations and personas: A possible methodological union?

Identificação e mapeamento de públicos em Relações Públicas e Personas: uma união metodológica possível?
Identificación y mapeo de audiencias en Relaciones Públicas y Personas: ¿una unión metodológica posible?

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ABSTRACT
This paper aims to evaluate the possibility of joining the perspectives of building personas and identifying and mapping publics in public relations. The bibliographic research covered national and international publications. The theoretical approach related to publics brings authors who study the object, write about the concept and activity. The focus on personas brings some of the most recognized authors in this subject. The review considered the quality of the description of the methodological processes of the references found between 2002 and 2020, in databases such as the CAPES journal portal and Google Scholar. The paper concludes that the persona methodology adds value to the activity of identifying and mapping publics, as it improves and brings more reliability to the process in terms of data collection, analysis and presentation techniques.
Key words: Methodology; Personas; Publics; Public Relations.

Introduction

Establishing strategic relationships between organizations and their publics is one of the primary objectives of Public Relations (PR) practice. Publics both affect and are affected by the actions of these entities, being capable of exerting positive or negative influences on them. They consist of individuals with various cultural, ethnic, economic, and other characteristics, who share a common interest (WILCOX et al., 2001; FRANÇA, 2012). From this perspective, identifying and mapping publics is essential for the success of any strategic communication plan. By adopting the concept of personas, it becomes possible to gain a deeper understanding of the characteristics of these groups and how they influence their opinions and behaviors toward organizations, their products, and services. Therefore, this article explores two themes — publics in PR and persona construction — with the aim of assessing the possibility of integrating these perspectives in the research of the object — publics.

The concepts, research techniques, and classifications used for publics in PR are varied, reflecting the existence of different types of organizations[1] that respond to social and market demands. In 1989, Brazilian researcher Andrade defined a public as a group of individuals who spontaneously come together, possess abundant information, have opportunities for discussion, and seek to express a collective opinion. Andrade (1989) classified publics as internal, external, and mixed, based on the geographic/spatial criterion the object assumed in relation to organizations. This concept, considered limited, prompted theoretical revisions to incorporate factors such as power and influence in the analysis of the relationship between organizations and publics (SIMÕES, 1995; FRANÇA, 2012; MARTINS, 2019; MARTINS, ROCKEMBACH, 2020).

Publics can be characterized as partners, individuals, or groups of people, organizations, or other entities that make up the relational environment (SIMÕES, 2001). These collectives may consist of a variety of profiles, and understanding them in a homogeneous manner can lead to stereotypical interpretations. The distortion of an image can directly affect decision-making negatively, as it may not align with the actual context. França (2012) observes that one of the challenges in research on this topic lies in the description and understanding of the methodology used to identify, map, and classify publics.

The construction of personas is a methodology that employs various techniques for data collection, analysis, and presentation. Introduced by Alan Cooper in 1998, it rapidly gained popularity due to its effectiveness (COOPER, 2008). Personas are archetypes based on information collected from real individuals and contexts through both quantitative and qualitative methods. They aim to present one or more paradigms of who the strategic public is for an initiative, thus facilitating the development process and optimizing results (GRUDIN, PRUITT, 2002; PRUITT, ADLIN, 2006; COOPER, REIMANN, CRONIN, 2007; STURMER et al., 2019a, 2019b).

The central argument of this article is guided by both professional and academic perspectives. It is understood that comprehending the methodology of persona construction adds value to the professional practice of identifying and mapping publics. This is because it prompts reflection on research techniques that both benefit and renew the methodological conceptions related to the field. Understanding the groups that are interested in the organization and identifying them as publics is a crucial phase in the PR process. However, there is still a need for parameters or criteria to systematize the classification of the object (FORTES,

1 In this article, an organization is understood as a planned grouping of individuals who perform functions and work together to achieve common objectives; and a set of organizations working toward a specific goal forms an organizational system, composed of different collectives (MATTOS, 1978; KUNSCH, 1986).

2003). The relationship between organizations and their publics is complex, so research that provides data for a deeper understanding of these various collectives is vital. “All classification work requires reflection and a methodological approach to the procedure to be adopted” (FRANÇA, 2012, p. 95). In this context, this article proposes a reflection to expand the methodological perspective within the field, aiming to reinforce it as a legitimate scientific process in the profession. It also aims to position PR professionals as specialists in identifying strategic profiles, thereby seeking effective results for various scenarios.

Following this, the text presents the theoretical review resulting from the bibliographic research. The keywords used for the search were: origin of personas, personas, personas methodology, publics in public relations, and public relations. The review on personas focused on articles and books published between 2002 and 2020, sourced from the periodical portal of the Coordination for the Improvement of Higher Education Personnel (CAPES); Google Scholar; and the Lume repository at UFRGS. This allowed for the identification of the most recognized authors in the field, based on the quality of the descriptions of the methodological processes outlined in their works (MARTINS; VANZ, 2021). The theoretical framework related to publics in PR includes authors who have studied the subject, writing about the concept and activity over time. The aim was to determine whether their works suggest research techniques for practice and the perspective in which the activity is applied — whether from the organization’s side, the publics’ side, or both. The objective was not to compare or discuss whether the existing concepts and classifications are adequate.

Publics in Public Relations: Concepts, Classifications, and Research Techniques

Below are some perspectives on publics, demonstrating the breadth of this concept. Grunig and Hunt (1984), American scholars, define a public as a group of people facing a similar problem, recognizing its existence, and organizing to address it. The authors proposed the Situational Theory of Publics, a model composed of independent and dependent variables (see Table 1 next), which is considered the most complex method for identifying and segmenting the object (MÍGUEZ-GONZÁLEZ, 2006).

Table 1. Variables of the Situational Theory of Publics

Independent Variables	Dependent Variables
Recognition of problems that generate the public.	Information-seeking behavior by members who exhibit active communication, where the individual processes the information received and takes action to obtain more.
Recognition of obstacles that may affect the behavior of individuals within that public.	Information processing or passive behavior, where the individual is limited to processing information received randomly.
Information processing or passive behavior, where the individual is limited to processing information received randomly.	-----------------

Source: GRUNIG; HUNT, 1984; MÍGUEZ-GONZÁLEZ, 2006.

By combining high or low values for each of the variables, the types of publics are identified. Although the Theory presents a model, it does not provide explicit techniques for data collection, analysis, and presentation. While it has significantly influenced research in PR, there is no consensus among scholars regarding its application (GRUNIG; HUNT, 1984; MÍGUEZ-GONZÁLEZ, 2006).

In Brazil, Simões (1995; 2001) defined publics as groups of individuals or organizations that are either influenced by or have an influence on the actions of organizations. He proposed four classifications: decision-making publics, behavioral publics, opinion publics, and consultative publics. This framework is based on the ideas of Lucien Matrat, the author of the Athens Code (1965) (FRANÇA, 2012, p. 28). The first classification refers to publics that hold the power to determine aspects of the organization’s existence and activities, both legally and formally. The second classification refers to those who carry out the organization’s activities, fulfilling its purposes. The third involves publics that have the power to influence actions, but are not necessarily part of the internal structure. Lastly, the consultative publics are those whose opinions are considered important in the decision-making process.

Publics vary in terms of complexity, size, and the potential power they can exert over the organization’s interests, with varying probabilities of obstructing its actions. The relationship between the organization and its publics occurs within a social system, supported by a communication process where information serves as the raw material. This process is based on seven dimensions: cultural, economic, political, ideological, historical, legal, and philosophical. It forms a delicate balance of cooperation and conflict between the parties, unfolding in a non-linear manner and exhibiting characteristics such as satisfaction, dissatisfaction, rumors, coalitions, pressure, conflict, crises, arbitration, and social upheaval. Simões (1995; 2001) does not present a methodological proposal for identifying and mapping the publics in these definitions.

According to Fortes (2003), a public can be any group that has an interest in or a real or potential impact on the actions of the organization, which can be understood in terms of spatial proximity and the nature of the relationship. These include: shareholders, government, employees, charitable organizations, etc. The reference adopts the classification of internal, external, and mixed publics, considering the type of involvement to be established, the degree of dependence, and the capacity to generate favorable or unfavorable impacts on the organization's future. The author also discusses the term stakeholder, referring to individuals and interest groups who exert pressure on the organization's actions and can be affected in various ways by decisions. To profile the publics, Fortes (2003) suggests the following research methods: ethnographic research, participatory research, action research, attitude surveys, focus groups, bibliographic research, polls, and informal conversations.

The Brazilian scholars Soares and Lomando (2010) adopt Simões' (2001) concept of publics. They argue that classifying publics requires reflection on two aspects: 1) the relationship policies adopted by organizations and 2) comprehensive mapping through classification criteria. To this end, they propose several techniques: documentary research (in reports, archives, films, and presentations); quantitative interviews (via phone, email, or in person); focus groups or discussion groups as options for gathering qualitative data, as well as opinion and climate surveys to further deepen the understanding of publics. The authors provide a brief description of some of these techniques but do not delve into their application in detail.

França (2012) defines publics as organized groups from various sectors (public, social, economic) that can authorize the establishment of or provide the necessary support for business development. This definition is based on three relationship criteria: 1) The degree of legal or situational dependence of the organization on its publics, to enable its formation, existence, productivity, and sustainability in the market. 2) The degree of participation of the publics in the organization's operations, in defending its interests, and in promoting its institutional agenda. 3) The degree of influence the public can exert on the organization and its activities. From this logical framework, three categories of relationship networks are formed, as presented in the following Table:

Table 2. Categories of Publics – Logical Conceptualization

Essential Publics	Legally Linked to the Organization, or Not. The organization depends on these publics for its existence and operation. They are divided into constitutive publics, which provide essential resources for the organization and engage in core activities, and non-constitutive publics, which enable the organization's existence by maintaining productivity and contributing to core activities.
Non-Essential Publics	Specific Interest Networks that have a greater or lesser degree of participation in the organization and provide only external services.
Interference Networks	Competitors who operate with the same objectives as the organization, Mass Communication Networks (print, electronic, and digital) that can influence public opinion and pose a high relational risk, and Activist and Ideological Networks, structured nationally and internationally, which impact public opinion in defense of various causes.

Source: FRANÇA, 2012

The author notes that the classification of publics can vary depending on the type of organization, and that qualitative techniques are the most reliable when the goal is to identify the relational context. França (2012) recommends starting with a comprehensive list of all the publics with whom the organization interacts. Next, it is necessary to identify which of these publics maintain a more frequent relationship and select those that are essential for business development, distinguishing them from those that do not meet this criterion. Then, the type of relationship the organization wishes to maintain with the selected publics is determined (business, political, operational, etc.). A single public may establish more than one type of relationship with the organization, and vice versa. Following this, the specific objective of each relationship is defined; for example, shareholders = securing investments. At this stage, the level of dependency in the interaction between the organization and the identified public is assessed, considering the level of participation that public has in the business. The expectations of both the organization and the publics are then clarified, identifying the priority publics. After data collection, tables can be constructed to indicate relationships according to the research objectives.

Silva (2020) examines the relationship between publics and organizations, emphasizing that the digital environment has significantly transformed the dynamics of this interaction. The author underscores that publics are no longer merely recipients of information but have become content producers, influencing organizational decisions and public perception of companies. Furthermore, she highlights that the dissolution of geographical barriers facilitates greater proximity. This new reality necessitates that PR identify, understand, and analyze relevant publics, adapting communication strategies to address the influences and interactions that take place in this environment. The publication concludes that an analysis of the academic literature on the organization-public relationship reveals a significant approach within the field. The research reflects the need to understand and classify publics for the success of PR practices. It is supported by authors who discuss the role and importance of the profession in managing organizational relationships, such as Roberto Porto Simões, Fábio França, and Margarida M. K. Kunsch. However, the study points to a gap in research that explores the definitions, classifications, and practices for identifying and analyzing these publics in the digital environment.

From the above, it is evident that some references contribute practically to the research methodology of the subject. França (2012) addresses the entire process, from data collection to the presentation of results, focusing his discussion on the criteria for relationships and their variables. However, he does not provide a detailed description of the techniques used. While the author considers the perspective of the publics at certain points, his data collection is primarily focused on the senior management of the observed organizations. Fortes (2003) and Soares and Lomando (2010) make significant contributions by suggesting both qualitative and quantitative techniques for the process. It is apparent that qualitative techniques are the most frequently mentioned, including the use of guides as a research tool and interviews as a data collection technique. However, it is understood that the focus remains centered on the organization. The publications leave room for further discussion and deeper reflection on how a methodology for the identification and mapping of publics can be developed that effectively takes into account the representatives of these collectives.

It is understood that by adopting the concept of personas, the activity is decentralized from the organization's perspective. This approach enables a view of publics as collectives of diverse individuals with shared interests. Emphasizing this diversity broadens the potential for success in communication strategies. Gaining an understanding of the routines, contexts, motivations, aspirations, dissatisfactions, and concerns of these individuals allows for the identification of more targeted and effective paths to foster strategic relationships. In light of this, the following proposals for persona construction are presented.

Construction of Personas: Concepts and Methodologies

The concept of personas originated from the challenge of demonstrating the use of business software developed by Alan Cooper in 1975, a researcher recognized for humanizing technology through user experience. Initially, Cooper interviewed eight colleagues, potential candidates to use the software. Based on the primary goal of the program, Cooper conducted a more in-depth interview with one individual from the group. The data gathered formed the basis for the first persona developed by Cooper, referred to as the "primitive" persona. Both the term and methodology were not formally introduced by the author until 1998, with the first edition of the book The Inmates Are Running the Asylum. Today, the term and methodology are applied across various fields of study — computing, design, business, engineering, and, to a lesser extent, in PR. It is important to note that, regardless of the specific efforts, the overarching goal remains the same: to prioritize the needs of the audience when developing any initiative.

According to Grudin and Pruitt (2002), personas are fictional characters with names, ages, gender, ethnicity, education level, socioeconomic status, clothing, occupations, families, friends, pets, and so on. The authors advocate for both quantitative and qualitative research as methods that provide an overview of the persona. For data collection, they suggest ethnography, market research, interviews, and observation. The representation and communication of these profiles should be multifaceted, multimodal, continuous, and progressive. The authors recommend using photographs of real people to represent the personas and argue that "amateur" volunteers are better than professional models.

Pruitt and Adlin (2006) define personas as fictional profiles that assist in project development, described in detail based on data from real individuals. They outline five stages in the persona lifecycle: 1) Family Planning (initial data collection from the organization); 2) Conception and Gestation (development of archetypes from the framework built on the information gathered in the previous stage. This framework allows for identifying how many personas can be created and how to prioritize them during the idea development phase); 3) Birth and Maturation (the launch and communication of the profiles to the team); 4) Adulthood (the actual use of the profiles in the development process); 5) Retirement (in this phase, it is determined which of the profiles should be discarded or reused). For data collection, they suggest the following sources: a) Primary sources: data obtained through direct observation of the audience (behaviors, actions, thoughts, feelings; previous research); b) Secondary sources: data provided by third parties, which may be quantitative – generated through surveys, structured telephone interviews, or server log analysis; and qualitative – derived from observational visits, ethnographic studies, and individual interviews. The authors also suggest various methods for communicating personas, including photographs of real people, illustrations, names, and narratives that describe the relationship between the audience and the product or service.

Cooper, Reimann, and Cronin (2007) define personas as descriptive models that provide information about how the audience behaves, what they aim to achieve, and why. They are archetypes based on data collected from real individuals, consisting of aspects of social and political awareness. They are referred to as archetypes because they are formed by standard groupings observed in individuals in similar contexts. In other words, they are not stereotypes, which represent biases and assumptions of organizations and their initiatives.

The discussion on archetypes and stereotypes deepens when examining their roles in persona development and the impact each concept can have on organizational strategies. Archetypes, as indicated by the authors, are constructs based on detailed research. These models capture the essence of shared characteristics, allowing for their application in a manner that fosters authentic and empathetic connections with the target audience. In contrast, stereotypes are simplifications that often arise from cultural, social, or organizational biases. They tend to reduce the complexity of human behavior to clichés or preconceived notions, which can result in initiatives that are disconnected from the audience’s reality. While archetypes acknowledge diversity and specificity, stereotypes risk perpetuating inequalities or marginalizing social groups by reinforcing narrow, outdated perspectives.

Cooper, Reimann, and Cronin (2007) suggest that quantitative, demographic, and market data function as filters to narrow the scope of interviews with individuals within the target market. Therefore, qualitative research is considered the most suitable approach for persona development. The most effective techniques include literature reviews, interviews with stakeholders and customers, focus groups, observation, and ethnographic field studies. To construct the persona, it is necessary to map the subjects, identify behavioral variables, observe whether patterns emerge, synthesize the characteristics and relevant goals, and expand the description of attributes. The authors advocate for combining collages with carefully written narratives as an effective method to convey the emotional and experiential aspects of the persona. According to the scholars, up to six types of personas may coexist: primary, secondary, supplementary, customer, server, and negative.

Sturmer et al. (2019a) argue that personas can assist in identifying the specific characteristics of the audiences with which an organization interacts. To achieve this, they conceptualize personas from two perspectives. The first perspective is technological, focusing on the user and grounded in Cooper’s concept. This perspective is divided into Marketing Personas, which explain customer behavior but do not delve into the underlying reasons for it; Proto-personas, created from secondary data and the team’s perceptions, used when there is insufficient time or budget to construct personas based on research with real people; and Design Personas, which focus on the user’s goals, behaviors, pain points, and needs, as opposed to their preferences.

The second perspective by Sturmer et al. (2019a) is that of marketing, explained through the concepts of buyer persona and inbound marketing. The first aims to understand consumer behavior and needs in order to design communication strategies that encourage the consumption of the offered products or services. In inbound marketing, content creation is driven by the interests of the audience. The goal is to build trust and promote the credibility of the organization and its actions. The authors note that the development of buyer personas is based on market research and customer data. Data collection can be conducted through surveys and interviews (with both current and potential customers), utilizing demographic data, as well as information on personality traits, preferences, interests, and challenges faced by individuals.

Sturmer et al. (2019b) assert that there are several models that guide the construction of personas. However, all of them converge in their objectives, focusing on the needs of the audiences. The reference introduces the concept of the Organizational Persona Map, which proposes developing the communication process based on the needs of the individuals who make up the audience. This is grounded in three stages: 1) Organizational Scenario Map, which adopts the classifications of Simões (1995; 2001). 2) Persona Design, aimed at constructing the profiles of the organization's audiences from a broad perspective. This includes, for example, customers, the community, professional associations, partners, employees, the media, etc. 3) Relationship Map, which outlines the type of relationship the organization intends to establish with the audiences, considering their strategies, as well as the power exerted by the audience, their expectations, and objectives. The tactical communication plan is developed based on the information gathered from these three stages. The references do not mention specific models for presenting the constructed personas. However, the models of the data collection frameworks make the process efficient and reliable (STURMER et al., 2019a; 2019b).

In light of this, it is understood that the construction of personas allows for the enhancement of the humanization of organizational interactions, placing the audience at the center of both the identification and mapping activities as well as the communication strategies. However, this practice raises critical questions about the depth and representativeness of these profiles. On one hand, robust methodologies based on qualitative and quantitative data allow personas to capture real behaviors, motivations, and contexts, fostering empathy and effectiveness in organizational actions. On the other hand, the use of proto-personas or approaches based on team perceptions may lead to stereotypes and compromise the authenticity of the representations, making them detached from reality. This raises a critical point: to what extent are organizations willing to invest in the methodological rigor necessary to construct personas that genuinely reflect human complexities?

Models such as the Organizational Persona Map (Sturmer et al., 2019b) broaden the concept of personas by mapping power dynamics and expectations. However, the absence of standardized models may undermine the effectiveness of the proposals. This raises the question of how organizations can balance the pursuit of operational efficiency with the need to respect the uniqueness of the audiences they engage with. In this regard, the practice of constructing personas in PR should not only align with the strategic objectives of organizations but also serve as a critical and reflective tool that promotes inclusion and strengthens social relationships within the communicative environment.

Union of Methodological Perspectives: Identification and Mapping of Audiences in PR and Personas

The integration of these perspectives appears to be a viable approach for enhancing the investigative practice of PR, particularly in terms of positioning the audience at the center of the process. The study by Martins (2023) serves as an example of the practical application of this methodological integration. The aim of the study was to understand who the personas are that represent the user audience of Biological Sciences – Ecology, for initiatives supporting the Brazilian movement for open access to research data. The research combined techniques from the persona construction methodology and PR practices, grounded in bibliographic research, reuse of data from the survey (GT – RDP Brazil, 2018), and semi-structured interviews. The interviewee sample consisted of individuals from the survey, as well as people involved with groups or institutions advocating for open access initiatives.

It is understood that by collecting information directly from individuals, a better understanding of the profiles is achieved, making them analytically valid. By focusing PR activities solely on the organizational perspective, professionals may diminish their expertise in identifying strategic profiles for other contexts, driven by social and market demands in a global, competitive, and dynamic environment.

Other key aspects of persona construction that contribute to PR activities are: 1) The concept of archetype by Cooper, Reimann, and Cronin (2007) – personas are composed of real data observed in similar contexts. This approach allows for a deeper understanding of the various individuals that make up a specific collective, their contexts, and characteristics. It enables the identification of more than one representation for the same audience; 2) The understanding of the persona lifecycle stages proposed by Pruitt and Adlin (2006). For instance, the concept of the "skeleton" – the conception phase – which provides a preliminary image of the audience, drawn from initial factual data. The sketch allows for identifying known elements and highlighting those that are still unknown or require further exploration; 3) Additional stages include adulthood, where the personas are actively used in the process of developing communication strategies, as well as retirement, which evaluates which personas should be discarded or reused in new planning efforts; and 4) The model for presenting these archetypes, composed of narratives made up of both images and text, which aim to facilitate the communication and understanding of these profiles by stakeholders. It is noted that the proposals by the authors who address the "public" object and its potential presentation focus on tables and charts.

Similarly, the text highlighted the contribution of the concept of publics in PR to the concept of personas. Understanding archetypes as publics enables a more accurate identification of their shared interests in relation to the service/product offered; how they are impacted by and influence the projects; and the potential power they can exert over the interests of the organizations in achieving their missions, objectives, and goals, either promoting or hindering their actions.

Conclusions

Based on the foregoing, it is understood that the persona construction methodology can function as an agent of improvement in the activity of identifying and mapping publics in PR, enabling a more human-centered and comprehensive analysis of organizational publics. Furthermore, it is observed that, in a similar fashion to PR scholars, persona researchers prioritize qualitative approaches, as they provide a more thorough understanding of the subject matter. However, they offer a more precise description of the stages of the process, which enhances both practical application and reliability.

Quantitative techniques also contribute to the process by providing precision in analysis, as they enhance the understanding of the diverse individuals within a heterogeneous context. By combining qualitative and quantitative techniques in a complementary, rather than overlapping, manner, it is possible to collect meaningful data regarding the publics, thereby enabling a more precise mapping of the organizational relational environment.

The fact that archetypes are based on a set of real individuals allows for a better understanding of the diversity within collectives and the discovery of multiple representations for the same audience. In this context, it is understood that real information about audiences cannot be obtained solely by analyzing perspectives centered around the organizations. This can lead to the formation of stereotypes, which reflect biases and assumptions, as it considers only one side of the relational system. Consequently, the distinction between archetypes and stereotypes is crucial in order to prevent communication strategies from becoming tools that perpetuate exclusion or prejudice. By choosing archetypes, organizations commit to a deeper and more respectful understanding of their audiences, considering their needs, desires, and contexts in a legitimate and relevant way. On the other hand, the inadvertent use of stereotypes can undermine the organization's credibility and limit the positive impact of its actions.

From the union of perspectives, it becomes clear that there is no single profile, or exact number of profiles, that represent a specific audience. In other words, a particular audience can encompass a diversity of archetypes, each with distinct interests and varying influence over strategies, initiatives, products, services, etc. These personas can fit into different audience classifications depending on the context. Therefore, constructing personas and classifying audiences in a homogeneous way can limit their understanding.

Finally, it is considered that, despite the important reflections presented in this article, there is still a need to deepen both the practical and theoretical knowledge regarding how the persona construction methodology can benefit the identification and mapping of audiences. It is necessary to diversify perspectives and expand the literature on the union of perspectives in order to systematically evaluate, and thereby promote, greater reliability, validity, and utility of the proposed methodology for the field of PR.

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