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The condition of the public relations industry in Poland. Changes and directions of development

Professor **DARIUSZ TWORZYDŁO**

Faculty of Journalism, Information and Bibliology,

University of Warsaw

e-mail: dariusz@tworzydlo.pl

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ABSTRACT

The article contains a description of the changes that have been taking place over the past few years in the Polish public relations industry, including factors related to COVID-19. The publication presents the methodology of construction and

structure of the public relations industry condition index. The project was conducted in 2017, 2019 and 2021. The recent quantitative survey was conducted with a sample of 421 public relations professionals. This is one of the largest surveys conducted in the Polish communication market.

KEY WORDS: Public relations, Covid-19, internal communications, Poland.

INTRODUCTION

The public relations industry in Poland has been developing intensively for more than 30 years, and it is closely linked to the beginnings of the development of democracy and the free market (Szuba, 2022, p. 11). The changes that took place after 1989 caused this sector to also find its place in the economy. It was then when the first PR agencies emerged, and corporations increasingly noticed the need for professionalisation of communication efforts (Tworzydło et al., 2021, p. 97). This period also witnessed the need to build elements of the business environment, among which image-building specialists had an important place. Notably, the PR industry has begun to develop more intensively recently, due to the dynamic changes that are taking place in the area of tools used in communication activities. This is especially the case with social media and information technology, which are used by public relations practitioners in communication processes.

The public relations market in Poland is formed by a number of entities included in four key groups. Thus, these include independent public relations professionals, PR agencies, industry organizations and other support entities. Figure 1 presents the set of entities that also form the basis (research operative) for the research used for the purposes of this article.

In the group of independent professionals we classified representatives of internal services in companies, offices, institutions, universities, institutes or NGOs, but also freelancers. The group of support entities includes both sponsors and patrons, industry focused media or entities that at one time played an important role in the PR industry in Poland, namely the Council of Ethics in Public Relations and the Internet PR Foundation. The industry is also growing thanks to educational processes undertaken at universities, which, however, are still lagging behind market expectations (according to the survey). However, it's not just about majors, but more about the issue of introducing specialized subjects taught by practitioners into university curricula.

The level of education is therefore defined to a large extent precisely by the building of experience by students, who need not only theoretical knowledge, but also a practical base that will enable them to build the necessary areas of competence. In addition to the above entities, public relations agencies play an important role in the

industry, which, based on another research project conducted under the direction of the author of this publication, were identified 934 (Tworzydło, and Szuba, 2022, p. 76).

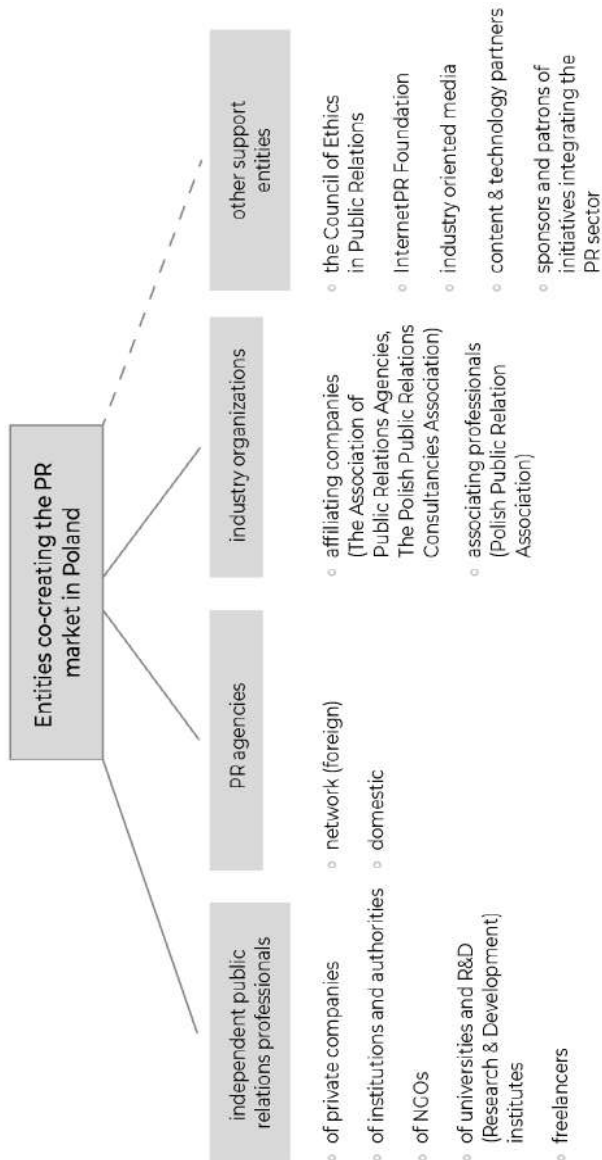


Figure 1. The structure of the public relations market in Poland in theoretical terms

Source: P. Szuba, 2022, p. 13.

The changes described in this article apply not only to earlier years, but also to the upcoming period, which is related to the COVID-19 pandemic. During this period, special changes occurred not only in the tools, but also in the task spheres of public relations, where such areas as crisis management and internal communications benefited. It can be concluded that further changes will be more and more intense, because the media market is transforming, as well as customer requirements. It is also noteworthy that media relations and communication methods between public relations practitioners and journalists also changed during the COVID-19 pandemic (Tworzydło et al., 2021, p. 44).

On the one hand, these changes are strengthening the industry, while on the other hand, they are increasing the demand for public relations services. One might get the impression that the public relations industry is stabilizing and strengthening. So far, there have also been insufficient research projects conducted in this growing industry to describe the public relations sector. Therefore, the indicator described in this article can provide a basis for further discussion in this area. It can guide researchers to areas that need special attention.

In conclusion, this article provides a description of the methodology for creating an industry condition index, as well as selected results and analyses of the data obtained in the course of the research work, which was carried out in three different periods.

1. RESEARCH METHODOLOGY

Surveys of the condition of the public relations industry¹ are conducted periodically every two years. So far, three editions of the project have been conducted, in 2017, 2019 and 2021. In total, during three periods, we surveyed more than 800 professionals and experts who evaluated the various dimensions that make up the structure of the PR industry condition index. The research was carried out by a team of experts from the Department of Social Communication and Public Relations of the Faculty of Journalism, Information and Bibliology at the University of Warsaw, as well as employees of Exacto's Research and Strategic Analysis Department under the direction of the author of this article.

The survey – since its first edition – has been conducted among public relations consultants from various organizations and professional backgrounds, as mentioned in the introduction. Respondents therefore range from university employees to experts in various areas of corporate communications and professionals employed by PR agencies. The latest edition of the survey was conducted in conjunction with the

¹ The condition index is a proprietary solution developed by a team led by Dariusz Tworzydło, PhD, professor of the University of Warsaw, and Przemysław Szuba, PhD.

Association of Public Relations Agencies' Think Tank project. A total of 421 respondents were surveyed during this edition. Table 1 presents the distribution of the survey sample by period.

Table 1. Profile of respondents in the PR industry condition survey (in %)

<i>Characteristics of the survey sample</i>		<i>Survey 2017</i>	<i>Survey 2019</i>	<i>Survey 2021</i>
Number of effective questionnaires		157	253	421
Sex	Women	68,2	65,2	65,9
	Men	31,8	34,8	34,1
Education	Below high school	no data	0,0	1,2
	High school		1,2	9,1
	Higher (I or II degree)		89,2	84,4
	PhD or higher		9,6	5,3
Position	Executive	49,0	25,1	29,1
	Executive-management	51,0	53,6	44,5
	Management		21,3	26,4
Employed in	Public sector	17,9	40,0	25,9
	Private sector	52,9	36,3	23,8
	PR agencies and freelancers	29,3	23,8	50,3
Seniority in the PR industry	1-3 years	16,3	19,3	20,7
	4-10 years	52,5	39,5	32,1
	More than 10 years	31,2	41,2	47,2
Work experience in a PR agency	No experience	no data	57,1	34,0
	Respondent worked or works in a PR agency		42,9	66,0
Would you recommend a job in public relations industry to your friends and family?	Sum of "Rather yes" and "Definitely yes" answers	no data	58,3	55,6

Source: own study

Analyzing the methodological issues of the conducted research project, it should be noted that This is due to the fact that the sample has been expanded, and the research operative has been enlarged to specialists employed by public relations agencies that are part of the Association of Public Relations Agencies. in 2021 we can observe a slightly different employment structure than in earlier editions. Nonetheless, the 2021 sample size was the largest ever measured, which is beneficial for the quality of inference.

Looking at the detailed distribution of sex, education and work experience, it is noticeable that they are comparable throughout the history of the evaluation. Noteworthy, among other things, is the fact that the average number of years of working in public relations among respondents is 9 years in 2017, 10 years in 2019 and 10.5 years in 2021, respectively. In addition to this, it is interesting that the majority of PR professionals surveyed are willing to recommend jobs in their profession to others.

2. PUBLIC RELATIONS INDUSTRY CONDITION INDEX – SURVEY RESULTS

The index described in this publication is the result of studies and analysis conducted in the public relations industry. This indicator allows evaluating the industry on the basis of parameters selected by the researchers. It allows to capture the changes that are taking place in it. It contributes to the understanding of conditions occurring in the subject and object environment in the analyzed industry. It also provides opportunities to determine the potential of the PR industry when analyzing inter-period trends.

In the first survey, which was conducted in 2017, the PR industry's condition index was at the 57% level (average index 4.42 on a scale of 1-7). After two years, there was a change and a drop to 52% (average 4.14). The third edition of the survey showed an improvement, confirmed by a score of 55% (average 4.27). In every year analyzed, the value of the indicator was in the range described as a stable situation. It can also be seen that the pandemic has not weakened the industry, as it might have seemed at first.

The survey sample was the largest in the latest edition of the study, which shows the potential of this research and the growing involvement of practitioners in participating in this type of research initiative. Another key piece of information is how individual professional groups, including agencies affiliated with the Association of Public Relations agencies, view the condition of the industry. Well, it can be noted that in the PR industry the affiliation to a professional group or organization is not significant, because everyone is struggling with the same problems. Therefore, it is not surprising that the PR industry condition index in the group of employees working at the Association of Public Relations agencies oscillates at a similar level as in the entire sample.

It should be noted that the individual issues examined as part of the industry condition index in 2017, 2019 and 2021 break down similarly. Thus, no significant changes were seen that would indicate major declines or increases in any of the analyzed areas. Nonetheless, the relative best situation in the industry was assessed in 2017.

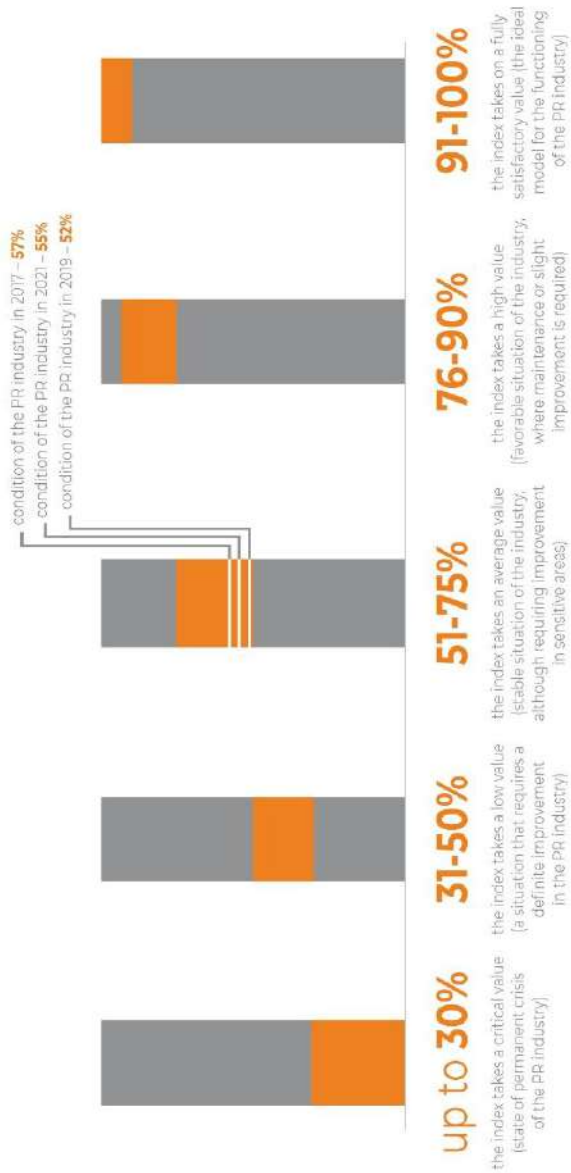


Figure 2. PR industry condition index 2017-2021

Source: study based on quantitative survey results

Table 2. Sub-indicators for the assessment of each dimension in 2017-2021, from which the PR industry condition index is built, along with the listed sensitive areas

<i>Sub-indicators</i>	<i>Edition of the study</i>		
	<i>2017</i>	<i>2019</i>	<i>2021</i>
PR industry development	68%	63%	63%
Customer awareness	49%	43%	48%
PR agency services	60%	56%	60%
Availability of professional staff	56%	49%	53%
Education system	43%	39%	43%
Market value of the industry	63%	58%	60%
Financial resources allocated to PR	61%	56%	56%
Demand for PR services	68%	63%	62%
Ethics in PR	52%	49%	51%
PR associations	50%	48%	49%

Source: own study

In the history of the survey so far, only in the case of two categories of sub-indicators were recorded in each measurement (each edition of the survey) values oscillating below 50% index saturation (i.e., relatively poor evaluation results). Such is the case with assessing the level of client awareness of public relations activities (43-49%) and education designed to prepare for the work of a PR specialist (39-43%). What's more, when it comes to evaluating the education system, the sub-indicator in 2019 even fell below the 40% threshold. In contrast, the upper limit of the saturation level of sub-indicators has never yet exceeded 70%.

Looking at the results of the survey in detail, it is worth noting that the respondents' professional experience – expressed by the number of years of work in the industry – does not correlate with the value of the index in 2017-2021 – that is, regardless of seniority in the PR industry, the condition of Polish PR is assessed by PR professionals in a comparable way ($p > 0.05$). It should also be noted that in 2017, women rated the condition of the PR industry better compared to men (53.5% vs. 50% saturation of the index at $p = 0.026$). Finally, in both 2019², as well as in 2021³, a positive correlation was observed between the willingness to recommend a PR job and the condition index. The last important point to note is that in 2021, the condition

² Tau b Kendalla = 0,292; $p < 0,001$; $n = 231$.

³ Tau b Kendalla = 0,249; $p < 0,001$; $n = 413$.

index significantly decreases with education level (below high school - 64.3%, high school - 62.9%, higher education - 53.7%, PhD or above - 51.1%, with $p < 0.001$).

3. STRUCTURE OF THE PUBLIC RELATIONS INDUSTRY CONDITION INDEX IN POLAND

Table 3 presents the structure and key methodological assumptions for the developed index. Thus, the rules for counting sub-indicators were specified, based on which respondents shared their opinions and assessments. Among them are parameters for evaluating the development of the public relations industry, assessing clients' awareness of public relations, evaluating the quality of services offered by public relations agencies, the potential of employees, the education system, ethics, market value or demand for public relations services. A bank of sub-indicators make up the overall indicator described in this article.

Table 3. Structure of the PR industry condition index - basic information

A bank of sub-indicators from the survey								
The PR industry in Poland is not growing	1	2	3	4	5	6	7	The PR industry in Poland is growing very fast
Customer awareness of PR is very low	1	2	3	4	5	6	7	Customer awareness of PR is very high
Polish PR agencies provide low-quality services	1	2	3	4	5	6	7	Polish PR agencies provide high-quality services
It is very difficult to find good PR professionals in Poland	1	2	3	4	5	6	7	It's very easy to find good PR professionals in Poland
Polish education system does not prepare for PR jobs	1	2	3	4	5	6	7	Polish education system prepares very well for PR jobs
The market value of the PR industry in Poland is declining	1	2	3	4	5	6	7	The market value of the PR industry in Poland is increasing
Companies are allocating fewer and fewer resources to PR activities	1	2	3	4	5	6	7	Companies are allocating more and more resources to PR activities
Demand for PR services in business circles is very low	1	2	3	4	5	6	7	Demand for PR services in business circles is very high
Companies providing public relations services do not pay attention to the ethical dimension of their activities	1	2	3	4	5	6	7	Companies providing public relations services pay extra attention to the ethical dimension of their activities
The phrase "public relations" evokes a commonly negative association	1	2	3	4	5	6	7	The expression "public relations" evokes a universally positive association
Directionality of scale	Semantic differential with oppositional characteristics located within 7-point scales, where ratings start with the relatively weakest - point 1, and end with the best - point 7							
Model design guidelines	- research preceded by expert interviews - facade relevance - the same directionality of the scale		- unidimensionality - balancing rank of variables				- the generality of the indicator - the same level of measurement - selection of valid observations	

Internal validation of the index						
Reliability analysis using the alpha-Cronbach's coefficient		Value ₂₀₁₇ (a)=0.801 Value ₂₀₁₉ (a)=0.729 Value ₂₀₂₁ (a)=0.828	The scale when excluding items showed that there was no contraindication to combining all variables into an aggregate index. Therefore, the entire bank of indicators is strongly linked to the model (10 elements).			
Public relations industry condition index	<i>Basic statistics</i>		<i>2017 Edition</i>	<i>2019 Edition</i>	<i>2021 Edition</i>	<i>Trend characteristics</i>
	Important observations		150	242	415	The condition of the PR industry is stable, but mediocre ratings from the community of Polish public relations professionals dominated. A 3 percentage point increase in the rate over 2019 should be considered a positive trend – given the pandemic crisis.
	Averaged numerical value (scale of 1-7)		4,42	4,14	4,27	
	Median		4,40	4,20	4,30	
	Standard deviation		0,807	0,692	0,849	
	Coefficient of variation		18,3%	16,7%	19,9%	
	Fulfillment level of the condition indicator (0-100%)		57%	52%	55%	

Source: own study

The index, developed by a team of experts, gives a complete picture of the public relations industry in Poland. To verify the validity of the index, qualitative research was conducted, among other things, as well as an in-depth analysis of the potential it could bring. It can be considered that this indicator is a reliable picture of the reality that is ongoing in the public relations industry in Poland. The survey found that the condition of the industry is stable, but the respondents' assessments were dominated by average results.

SUMMARY

The analyzed index gives a picture of the situation that is taking place in the Polish public relations industry. It allows not only an assessment of the situation, but also the identification of key factors influencing the changes that are taking place in the PR industry. Its value also lies in the fact that until now there has been no research in the field that allowed such broad inference. That's why both the methodology and the results of the study should be taken as a basis for further analysis, both general and specific, such as on the most sensitive areas.

As already mentioned, the selected parameters presented in the article show the situation and changes that are taking place in the Polish public relations industry. They also show two key issues that require intensive work. A key one is the issue of education. Particularly in this area it can be observed that there is a problem that requires a response. The intensity of critical opinions in this area does not depend on the place of employment. Even the researchers themselves see a problem, which

translates into the obtained final sub-indicator result. Studies show that in the field of education, it is therefore becoming extremely important to strengthen its practical side, through internships or other forms of practical training for students already in the course of their education, from the beginning of their studies. Another factor that needs discussion, at the very least, is the issue of ethics in the work of those who make up the Polish public relations industry. However, this aspect has been expanded in other studies that have confirmed the validity of changes in this area (Barlik, et al., 2022, pp. 19-36).

In conclusion, the industry condition index is a tool that can help measure the industry, but can also provide a basis for further, detailed research dedicated to the changes that are taking place in the industry.

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