

Analysis of Trends Affecting The Condition of The Public Relations Sector In Poland

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Abstract

This article contains a synthetic image of the public relations market in Poland, which is the result of the analysis of research conducted in 2019 on a sample of 253 PR representatives using the auditorium testing method. It is a continuation of a project initiated in 2017, which included 157 practitioners and researchers representing the sector. The main goal of the article is to measure the condition of PR market in Poland, described using statistical analysis and taking into account its main qualities. Nonprobability sampling was employed in the research methodology, and the research was conducted mainly among people handling communication in companies. The main goal of the project was to design, and then calculate a condition indicator for PR market in Poland based on analysis of the reliability and building statistical indexes. This article presents the results of two formerly conducted research projects (in 2017 and 2019), describes original analytical tools, presents the condition of PR sector in Poland, and can be a starting point for further international comparative analyses.

Keywords: Public Relations, Image Management, Analytic Review, Market Conditions

Introduction

The development of the public relations industry in Poland has continued uninterrupted since the beginning of the 90s of the 20th century. It was then when the first PR agencies emerged, and corporations increasingly noticed the need for professionalisation of communication efforts. During the first years after the political transformation in Poland, companies were shocked by the extraordinary effectiveness of advertising. Regardless of their quality, they could induce sudden changes

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in demand and convince potential customers to purchase goods. Only after their initial goals stopped being fulfilled, companies started looking for other solutions, that could aid the process of reaching the surrounding population.

PR became an obvious research topic, in context of possibility of its use. It was largely caused by the fact that in western Europe and the United States, many successes were achieved in this field. From a system view on public relations, this management area can be seen as a bridge-building or boundary spanning, which means that it is an area whose practitioners have contacts with all kinds of outsiders, whose aims are not necessarily the same. There is a certain, diversified identity of public relations in European countries; moreover - European public relations seems to have specific characteristics of its own (van Ruler et al., 2004).

The first customers of public relations companies in Poland were business-conscious international corporations, which entered the Polish market in the eighties and nineties of the last century (Łaszyn, Tworzydło, 2016). Then, convinced by the effects of good communication practices introduced to the Polish market by corporations, smaller companies started being active in the sector. It was not until much later that the communicative dimension of public relations was noticed in Poland - including communication of effects of socially responsible actions. (Cerin, 2002; Haddock-Fraser, 2012; Gawronski, Jakubowski, 2018)

There was a drastic change in attitude towards PR and to offered services in the last three decades. The main area of transformation is in the utility area, but also in managers' awareness, who increasingly take advantage of advisory guidance. It is worth noting that the catalysts for the evolution of public relations in Poland were also: the internationalization of the Polish economy, the development of the information society, and corporate social responsibility (Żbikowska, 2008). The dynamics of changes in the public relations sector in Poland were correlated with the development of modern information technologies. Internet became essential for running a business, which accelerated changes in the PR market (Alyaqoub, Rahman & Saad, 2020).

It is currently said that the PR sector in Poland is still in the phase of intensive growth, but its speed is limited by environmental factors (Kowal, 2018). The list of challenges that every PR consultant must face is long, starting from the search for solutions that reduce costs. Especially during economic disturbances, companies are forced to reduce, or even outright cease, all PR activities (ICCO, 2019). Research conducted by authors of the article proves that the speed of development of the PR sector was slowed down due to a serious economic slowdown caused by the spread of COVID19 infectious disease, caused by the SARS-CoV-2 virus. Many countries introduced open-ended blockages overnight. Home office may not be a good solution - sometimes it is outright impossible, and lack of mobility halted many companies. (Fernandes, 2020). Companies began cutting costs en masse. PR expenditures were reduced. Governments began searching for a compromise between saving lives and saving the economy. Lack of knowledge and quick spread of the coronavirus led to a situation in which many economical and moral decisions were extremely hard. (Coibion, Gorodnichenko Weber, 2020). Coronavirus became the main factor when making management decisions. It caused managers to look for solutions optimising former actions and to review strategic plans. This largely applies to companies working in sectors that were first forced to reduce expenditures.

Public relations market growth is strongly correlated with changes that happen in other branches of the industry. Those relationships are especially pronounced in the new technologies sector. Public relations draw from technological novelties and solutions augmenting information flow to a very significant extent. According to experts from the Public Relations and Communications Association, anchoring the public relations in digital technology will allow the sector to grow and improve its condition (PRCA, 2019). Globalisation introduces many new possibilities and challenges for PR practitioners. Constructing messages based on the Internet increased expectations for the quality of public relations actions. This, in turn, requires the practitioners to adapt and employ technological versatility (Amodu et al., 2019). Social media also influence mass communication and public relations. They were successfully employed for PR actions for years (Wang, 2015). Schultz, Utz, and Göritz (2011) examined the impact of the use of communication strategies using social media in the context of secondary crisis communication (e.g. sharing information) and the reaction of recipients (e.g. desire to boycott). Their research proves that social media have currently a bigger impact and driving force than standard communication channels.

The role of public relations is sometimes incorrectly reduced to supporting marketing departments (Mahendra, 2020). Public relations and marketing are sometimes viewed as discrete areas of operation, even though they aim to fulfil the same goals using different tools (Theaker & Yaxley, 2013; Gawroński, 2016). PR is also included as an element that creates an area of promotion inside of the marketing mix (Kotler, 1994). Opposite situations are encountered, however. Public relations professionals see marketing as part of their pertinent competencies. Despite the various approaches presented it is worth noting that all companies need public relations, but not all of them decide that marketing is needed for them, so they refrain from it (Theaker & Yaxley, 2013). It is also worth remembering that despite marketing and public relations deal with organisational relationships and employ similar techniques and strategies, they differ in their mission and target (Geremew, 2017). JE Gruning and LA Gruning, (1998, p. 141) stated that the most perfect form of public relations is the one that is strategic for the company/organization and in which the marketing element does not dominate. An organization is best served by a variety of marketing and public relations activities if these areas function in a separate, but not integrated manner.

Diagnosis of the condition of the PR industry

Changes taking place in the public relations industry in Poland influence the search for ways to diagnose its condition. Up to today, there is not any synthetic approach that could reliably assess an initial situation from the perspective of stakeholders themselves (Polish PR specialists). Measuring the condition of the industry is as problematic as the issue of assessing the effects of public relations activities. Despite the existence of many models, there are no sufficient indicators that would allow for a precise definition of the values that we obtain thanks to PR activities (Macnamara, 2015). There are obviously many indicators that represent both the effects of PR activities and the industry's development in numbers. It is worth mentioning the analysis of the PR agency market and their estimated revenues (ZFPR, 2020), the number of consultants and companies which identify themselves as entities providing public relations services, data from the *fee income* reports of the Public Relations Consultancies Association, the number of participants in industry competitions, the number of jobs offers on professional portals, faculties that are being opened, and other available forms of preparation for the profession of a PR specialist. It is worth noting that the data on *fee income* applies to a number of countries and has long been perceived as an element that differentiates markets. (Miller, Dinan, 2000). One cannot forget about the activities of industry organizations associating industry leaders and events integrating PR specialists. Research carried out around the world by the PR industry also concerns its perception by selected groups in their environment (Callison, 2004). Therefore, we have a number of variables, expert opinions, and studies at our disposal, but they do not take into account the human factor on a large scale - that is, how the public relations industry is assessed by people working in it. Therefore, it becomes necessary to conduct research that will allow building a compendium of knowledge about the condition and trends in the industry in a long term. As rightly noted by A. Laskin (2014) qualitative research projects, such as case studies, in-depth interviews, and observations can help advance understanding of the profession and PR professionals. Future research should evaluate how PR and investor relations can be measured and evaluated. The research results described in this article are an answer to such expectations. The PR condition barometer developed by the team of the authors of this publication is an attempt to assess the situation in the industry based on an indicator that reflects the moods prevailing among people who determine the strength of Polish public relations, regardless of the place of employment and the specificity of the tasks performed.

Analyses of the current state of the PR industry on an international scale are conducted by ICCO experts as part of the periodical "World PR" report. They are based on quantitative research among 3,000 heads of agencies operating in 41 member states. Extensive research allows optimization of activities within individual PR areas while developing the offer of the agency sector. The latest reports show a positive attitude of PR specialists who are very optimistic about the development of the PR market. The analyses indicate several areas that should develop particularly strongly soon. Those are mainly strategic consulting, corporate communication, as well as digital PR, and new technologies (ICCO, 2020).

Quantitative research is also used to assess how companies and their communication efforts are responding to current COVID-19 events. This type of research was conducted by, among others, the Public Relations Institute and the Peppercomm agency. The technique used was an online survey, dedicated to communication managers and senior management (IPR & Peppercomm, 2020).

The methodology of quantitative research was used to analyse the condition of the PR industry in Poland, which allows to determine the intensity of a specific feature by measurement (Szwed, 2009) and to compare the results in a longer time perspective. Additionally, it is possible to generalize some observations, which are rarely seen within the qualitative paradigm (Morse, 1999). Nevertheless, many public relations researchers use qualitative techniques. An example of this is the study of the political condition of public relations among Ghanaian citizens through group in-depth interviews and participant observation. As the authors indicate, the use of qualitative methods, in this case, was appropriate due to the cultural conditions of a given region (Krishna, Connaughton & Linabary, 2019). Another example is the desk research analysis, on which numerous rankings are based, providing knowledge about the functioning of the PR industry, e.g. Global PR Agency Rankings (PRovoke, 2020).

Methodological context

This article attempts to measure the condition of the PR industry in Poland, taking into account its key dimensions. Therefore, the way of defining the term "public relations" is associated with two contexts of meaning. The article is based on the definition of public relations saying that it contains all activities carried out by institutions, companies, PR agencies, aimed at establishing positive relations with the environment. Public relations is understood as fields of knowledge of professional skills needed to build a reputation and strengthen relationships (Ołędzki & Tworzydło, 2009).

In 2017, the authors of the article conducted research, the main result of which was the design and calculation of the PR industry health indicator. Thus, a cycle of diagnostic tests and a debate about the condition of the industry was initiated (Tworzydło, Szuba & Zajic, 2017). This article presents selected results from the two editions of the study conducted so far (2017, 2019) and is the starting point for further comparative analyses carried out on a two-year basis as part of the PR condition barometer. The main research problem can be narrowed down to a search for answers to the question: are there any significant changes in the way people employed in the PR industry perceive the condition of the industry between 2017 and 2019? Subsequent research projects were planned according to the original methodology while carrying out research on even larger samples (tab. 1). The conducted research is quantitative, thanks to which it is possible to obtain knowledge and results that can be transferred to the studied population. The main research technique was the auditorium survey. The

auditorium survey was used to collect 253 effective interviews, which were analyzed statistically. This kind of survey is completed at the same time by a specific group of respondents in the presence of the researcher, e.g. after a conference or training. (Kauf & Tłuczak, 2018). The choice of methodology was dictated mainly by the availability of respondents because in this way it is relatively quick to obtain expert opinions from many people staying in one place. The auditorium survey is one of the direct survey techniques and ensures a high level of control and usually a satisfactory percentage of correctly completed questionnaires with a marginal rate of errors and blank answers (Kaczmarczyk, 2014). This method allows for almost 100% return of the surveys. However, representative sampling cannot usually be used for this type of technique (Kauf & Tłuczak, 2018). An additional advantage is the possibility of direct contact with the respondent and explaining the research assumptions in the arrangement phase.

There are often claims about PR research of awkward research procedures, poor measurement of constructs, and research participant pools not accurately representing the overall population (Callison, 2004). In the case of the data described, such allegations are not confirmed. Data acquisition takes place during the largest industry event in Poland, which is the Public Relations Congress organized annually since 2001. The research was conducted directly by members of the article authors' research team. The sample (in 2017 - 157 respondents, and in 2019 - 253 respondents) is a conglomerate of specialists in PR from all over the country, who assess the situation in the industry from the perspective of 10 general dimensions using a semantic differential with opposing views. Despite a very large sample that was collected during the research, it cannot be considered representative, as no research frame in Poland would allow the selection of a sample based on specific variables following the rules of representativeness.

The structure of the index was developed based on consultations with PR practitioners and scientists working in Poland. Then, through tests, the indicator was checked against the key design guidelines and underwent internal validation. Each subsequent edition is to contain extended data in the PR condition barometer, which will improve the quality of statistical inference. Thus, it will be possible to apply procedures for intertemporal analyses, e.g. in a timeframe of a decade. It will also allow discovering the directions of development of the PR industry and its reactions to important events in the socio-economic space.

The profile of the respondents includes their gender, position in the organization, place of employment, professional experience, and the distinction of whether they are an employee of the organization's own PR cell or provide external support as an employee of a PR agency. This is important information in the context of people professionally associated with the Polish public relations industry and helps to better describe it. Due to the specifics of the article, the description of the variables related to the specificity of a PR specialist's workplace seems to be more important than the standard demographic variables, e.g. age or place of residence. The common feature of the respondents is the specialization in shaping the relationship of the organization with its environment and extensive experience in public relations.

Table 1: Profile of respondents in the 2017 and 2019 editions. The values in the table have been rounded and may not add up to 100%

Research sample characteristics		2017 research	2019 research
Number of effective surveys		157	253
Gender	Female	68,2%	65,2%
	Male	31,8%	34,8%
Occupation	Executive	49,0%	25,1%
	Managing	51,0%	74,9%
	Public sector	17,9%	40,0%
Place of employment	Private Sector	52,9%	36,3%
	PR Agency	29,3%	23,8%
Seniority in the PR industry	1 – 3 years	16,3%	19,3%
	4-10 years	52,5%	39,5%
	More than 10 years	31,2%	41,2%
Type of PR professional	Employee of the organization's own PR cell	75,7%	76,3%
	PR agency employee	24,3%	23,8%

(Source: own study based on quantitative research in 2017 and 2019).

Both in 2017 and 2019, the research sample was mostly women and people holding management positions. While in 2017 the main place of employment of respondents were private companies, two years later the public sector aggregated the most responses. Regardless of the edition of the survey, the public relations agency segment was also represented in large numbers (on average $\frac{1}{4}$ of the sample). This is because consultants are a very important part of the industry. Three out of four respondents of both surveys represented employees of internal public relations cells in companies. The average work experience in the PR industry of a statistical consultant in 2017 was 9 years (agency workers are associated with the industry relatively for the longest time - 10 and a half years), while the average experience in 2019 was 10 years for all respondents.

The diversified cross-section of the sample made it possible to review the situational conditions that representatives of the PR industry encounter while performing their daily professional duties. The analyses presented in this paper are mainly based on comparisons of averages, reliability analysis, and non-parametric statistical tests (Mann-Whitney U and Kruskal Wallis). Cronbach's Alpha was used as the basic measure of scale reliability, as it is the best known and most frequently used coefficient in similar analyses. If its result is higher than 0,7, the scale should be considered logically consistent (Sagan, 2014). Spearman's rho correlation non-parametric coefficient was used to determine the strength of the relationship between the variables, and linear regression allowed to determine changes in the perception of the condition of the PR industry depending on the number of years worked in the profession of a PR consultant. The choice of statistical methods was adjusted to the adopted sample selection, its size, and the measurement level of individual variables. The questionnaire was based primarily on an ordinal scale, which allows classifying according to the degree of intensity of a given feature (Szwed, 2014). The main research aim was to identify parts of PR market condition indicator that were assessed noticeably better or worse than in the first edition and to compare those results as parts of the diagnosis of the condition of PR industry. The research was designed to help find answers to questions related to the function of the Polish PR market, including: does place of work determine the assessment of the industry?, does seniority determine the assessment of polish PR?, do PR experts are optimistic about the future of their industry?, what trends in the Polish PR industry can be observed based on the first two editions of the research project?

Structure of the PR industry condition indicator

The PR industry condition indicator is a guideline in defining and assessing the parameters that describe the functioning of public relations advisors in Poland. The indicator allows for the presentation of changes in the area of professionalism of the industry and creates an opportunity to determine its potential (regarding the elements included in its structure). It is a statistical indicator that is based on the analysis of respondents' answers. It can be a starting point for international research projects, including in the area of competitive benchmarking. It is worth emphasizing that ICCO experts have a similar approach to the operationalization of factors that are intended to provide information in the context of the condition of the PR industry. In the current report, you can find information about the ethicality of the industry's operation or the assessment of its development (ICCO, 2020). The above aspects are also components in the structure of the Polish index. Additionally, the condition index is related to the way the term "public relations" is defined in the article.

A seven-point scale was used in the construction of the index. As part of it, the individual dimensions of the indicator are assessed, where the closer to 1, the more negative the opinion (description on the left side of the differential). On the right, there are positive opinions, where the maximum rating that the respondent could give to a given aspect is 7 points (tab. 2). The PR industry condition index is calculated based on the average value of the index for the respondents who assessed all dimensions in the questionnaire. Then the result obtained is converted into a percentage according to the proportion:

$$\frac{(\mu - 1)}{x} = \frac{6}{100\%}$$

In the two editions of the study conducted so far, there is a satisfactory scale consistency, which is confirmed by high-reliability coefficients. Additionally, the presentation of the results based on average values can be considered an optimal solution in terms of methodology. This was confirmed by relatively low coefficients of variation (proving that the average is an adequate statistic for describing the results of the surveyed samples). In the case of the PR condition barometer, an important role at the computational stage is played by the repeatability of the measurement in a specific time interval, hence the assumption that subsequent tests will be carried out in two-year intervals - starting from 2017. It is assumed that the more research projects are carried out, the better for the credibility and standardization of the PR health barometer. Table 2 is a synthetic description of individual activities, the effect of which is to determine the condition indicator of the PR industry in Poland.

Table 2: Structure of the PR industry condition indicator - basic information (Source: own study based on quantitative research in 2017 and 2019)

Survey index set							
The PR industry in Poland is not developing	1	2	3	4	5	6 7	The PR industry in Poland is developing very quickly
Client awareness of PR is very low	1	2	3	4	5	6 7	Client 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 specialists in Poland	1	2	3	4	5	6 7	It is very easy to find good PR specialists in Poland
The Polish education system does not prepare for work in the PR industry	1	2	3	4	5	6 7	The Polish education system prepares very well for work in the PR industry
The market value of the PR industry in Poland is decreasing	1	2	3	4	5	6 7	The market value of the PR sector in Poland is increasing
Companies spend fewer and fewer resources on PR activities	1	2	3	4	5	6 7	Companies spend more and more resources on PR activities
The demand for PR services in business is very low	1	2	3	4	5	6 7	The demand for PR services in business is very high
Companies providing public relations services do not pay attention to the ethical aspect of their activities	1	2	3	4	5	6 7	Companies providing public relations services pay special attention to the ethical aspect of their activities
The expression "public relations" has generally negative associations	1	2	3	4	5	6 7	The expression "public relations" has generally positive associations
Scale directivity:	Semantic differential with opposing characteristics located on a 7-point scale, where the grades start with the worst - 1 and end with the best - 7						
Model construction guidelines:	<input type="checkbox"/> research preceded by expert interviews <input type="checkbox"/> face validity <input type="checkbox"/> same scale directivity		<input type="checkbox"/> unidimensionality <input type="checkbox"/> balancing rank of variables		<input type="checkbox"/> indicator generality <input type="checkbox"/> same measurement level <input type="checkbox"/> selection of important observations		
Internal index validation							
Reliability analysis using the Cronbach's Alpha coefficient	Value for 2017 (n) = 0.801 Value for 2019 (n) = 0.729		The scale, excluding items, showed no contraindications for combining all variables into a collective index. Therefore, the entire set of indicators is strongly related to the model (10 elements).				
Public relations industry condition indicator	Basic statistics		2017 edition	2019 edition	Trend's characteristics		
	Important observations		150	242	The condition of the PR industry in Poland is stable, but average ratings were dominant. The decrease in the indicator by 5 points concerning the first edition of the survey should be considered a worrying trend.		
	Average numerical value (1-7 scale)		4,42	4,14			
	Median		4.40	4.20			
	Standard deviation		0.807	0.692			
Variation coefficient		18.3%	16.7%				

The reliability analysis described in the table, performed with the use of the Cronbach's Alpha coefficient, is an analysis carried out in the statistical program, which indicates whether the developed set of indicators examines the same phenomenon, taking into account the scale consistency. It takes a value from 0 to 1. Obtaining a result above 0,7 means that the designed scale is reliable (individual items are consistent and test the same phenomenon). The variation coefficient used in the analysis expresses as a percentage the level of homogeneity or diversification of a variable in a given group. The lower the value, the more homogeneous the group is, and the arithmetic mean can be considered an adequate statistic for a given community. The coefficient of variation is calculated by dividing the standard deviation by the mean (Tomaszewska, 2017).

Opinions of the surveyed PR specialists on the situation in their industry can be summarized with the words "convergence of views despite the passage of time". To confirm that it is enough to look at the relatively best and worst rated aspect. In 2017, these were issues related to the general development of the industry (average 5,08) and the education system preparing for the profession (3,60). After two years, the trends for the best and worst points remain unchanged, although the values of both averages have dropped (4,77 - development and 3,33 - education), which, however, does not affect their position in the ranking. Moreover, each of the dimensions, classified from 1 to 10 concerning the average obtained in 2017, kept its starting position in 2019 (there was not a single change). This state of affairs indicates stability, although a detailed comparative analysis is required to confirm such a proposition.

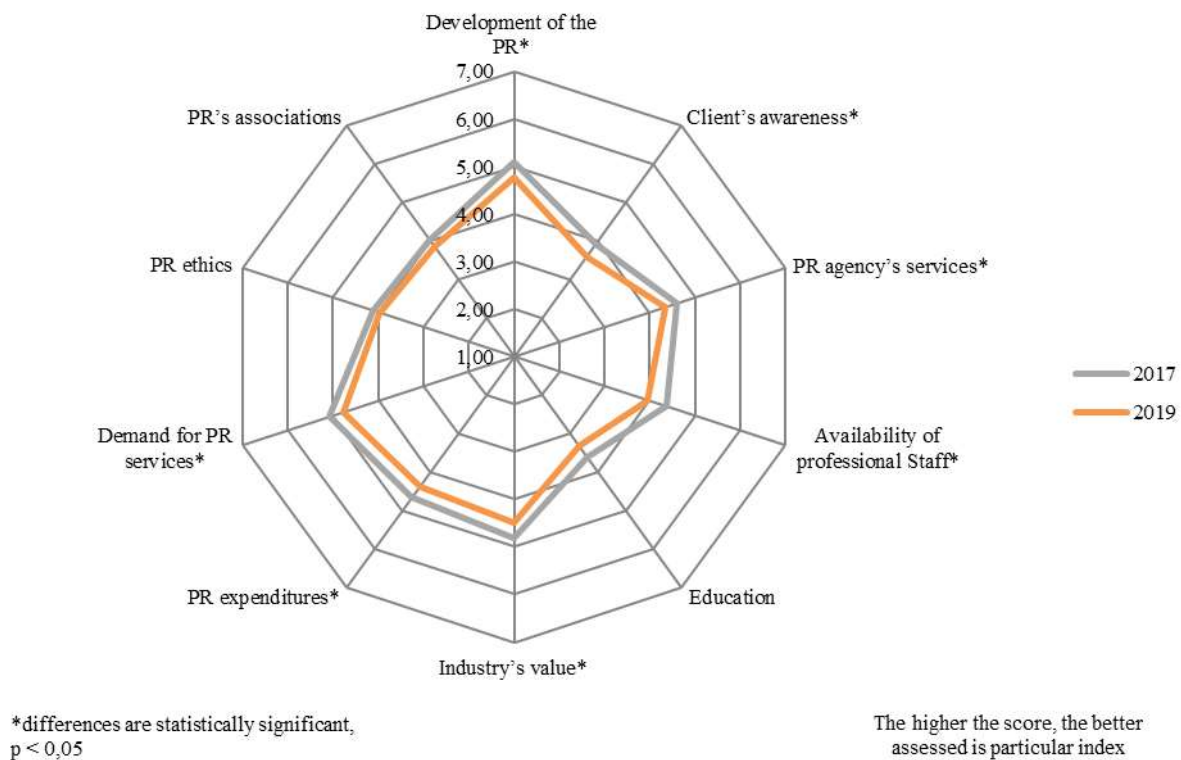


Fig. 1: Intertemporal comparison of the condition of the PR industry expressed on a radar chart

(Source: own study based on quantitative research in 2017 and 2019)

All dimensions under the condition index were better rated in 2017. Based on results of non-parametric tests, there are significant differences in the case of seven factors (the order based on the significance level p): the availability of staff ready to perform the profession of a public relations specialist ($p = 0,004$), the assessment of the dynamics of the development of the PR industry in Poland ($p = 0,007$), customer awareness of the PR solutions employed ($p = 0,008$), demand for qualified PR services ($p = 0,013$), industry market value assessment ($p = 0,017$), quality of agencies' services ($p = 0,041$) and the size of client's budgets for PR activities ($p = 0,045$). Therefore, the circumference of the orange figure in the above chart (situation in 2019) is much smaller than the grey one (2017). In 2019, PR opinions on the above factors were worse (more modest opinions were observed). This state of affairs should be an alarm signal e.g. industry organizations or academic circles because it is necessary to discuss the direction in which the Polish PR industry is heading (especially considering the current economic crisis caused by the coronavirus pandemic and the changes it will bring to services qualified as public relations). The current research on the mood of Polish PR people during the coronavirus pandemic, conducted by the authors of the article, confirmed that 38% of respondents see the future of the industry in a pessimistic way, compared to the state before the outbreak of the pandemic. Additionally, most of the respondents described the current crisis as the biggest in the history of the PR industry (58%). A large percentage is also concerned about a decline in demand for PR services (37%), and 12% of PR experts consider changing their job profiles (Exacto, 2020).

While during the first edition of the study, in the case of two components (industry development and demand for PR services) the average exceeded 5 points on a scale from 1 to 7, there was no such case two years later. This is another example of unfavourable changes in the industry. It can be viewed as a brake limiting its development. Additionally, in 2017, the average dropped below 4 points only twice (customer awareness - 3,93 and assessment of the education system for the profession - 3,60). In 2019, there were more such cases, because the list of factors from 2017 (awareness aspect - 3,60 and education of young adepts - 3,33) was expanded to include opinions on the availability of specialists and the ethical part of PR activities (both averages at the 3,96) and how the "public relations" concept was understood by the general public (3,85).

It is also worth paying attention to the distribution of extreme answers in both editions of the study and the relations between them. In 2019, the respondents picked those answers less often, leaning more towards opinions with a lower intensity (from 2 to 6 points on a scale of 1-7). During the first project, the worst assessments of a given dimension (only 1 - 3,75% of the total number of responses provided) occurred less frequently than responses with a maximum score (only 7 - 6,52%). In 2019, however, the trend was reversed and the percentage of totally negative responses was higher than that of totally positive responses (2,85% versus 2,57%). In search of significant intertemporal differences, it is worth using the variable defining the respondent's professional experience. The results from 2017 confirmed that with the increase in seniority, the ratings of the university education system in Poland increase in the context of preparing apprentices for work in public relations (rho

= 0,208; p = 0,014; n = 140). The aspect related to the financial expenditure on PR was assessed worse, i.e. the belief that budgets for PR were reduced ($\rho = (-0,189)$; p = 0,025; n = 140) and the ethical side of PR, expressed by the belief that ethical standards were not followed in PR services ($\rho = (-0,189)$; p = 0,025; n = 140). Meanwhile, research from 2019 did not confirm the previously observed correlations, but two other trends were revealed. The longer the respondents work in the PR industry, the worse they assessed the interest in public relations activities in business circles ($\rho = (-0,146)$; p = 0,027; n = 231) and the more often they pointed to the prevalence of PR stigmatization in public opinion ($\rho = (-0,210)$; p = 0,001; n = 231).

PR industry condition barometer - analysis of intertemporal data

In 2017, the condition of the PR industry in Poland was rated at 57% (average indicator 4,42 on a scale from 1 to 7). After two years, this decreased to 52% (average 4,14), which means a significant weakening in the indicator of the condition of the PR industry in Poland (p = 0,001) - based on results of non-parametric test (Mann-Whitney U test). The interpretation of the result uses intervals based on the school grades system (a mechanism also used in primary tests), which constitute helpful diagnostic material (fig. 2).

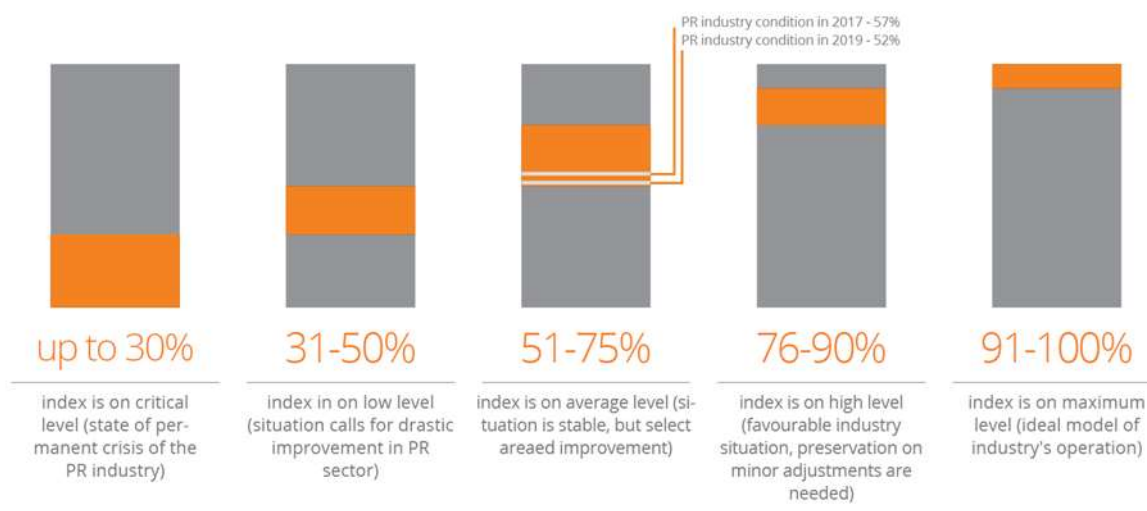


Fig. 2: Barometer of the condition of the PR industry in 2017-2019 in interpretative intervals

(Source: own study based on quantitative research in 2017 and 2019)

The analysis of the data obtained in 2019 confirms the conclusions drawn in the first edition of the survey. The condition of Polish PR was assessed as average. The obtained result provokes reflection and recommendation of preventive actions. The value of the indicator in 2019 still fluctuates in the range of a stable situation, with the need to analyse critical points. Maintaining this trend direction in the future may lead to a decline of the index to a lower interpretative interval.

Currently, the condition index fluctuates at the lower limit of the middle interval, which means there is a risk of transition to the undesirable zone (below 50%). Once again, PR advisers considered the greatest threat to the condition of the industry in Poland to be low customer awareness of public relations activities (in 2019 only 32% of respondents chose one of the points on the positive side of the scale, i.e. 5, 6 or 7 for this aspect, with only 2% choosing the maximum mark). The education system preparing young people for the PR profession was also considered a problem (only every fourth respondent was willing to give a positive grade, and only one person selected the maximum).

The analysis, using the comparison of average indicator, conducted separately for 2017 and 2019 editions, taking into account the variable of the gender of the sample (2019 edition) showed significant differentiation. Women assessed the current condition of the PR sector better than men (in their group the average value of the index was 53,5% compared to 50% among men) (p = 0,026) - based on results of non-parametric test (Mann-Whitney U test).

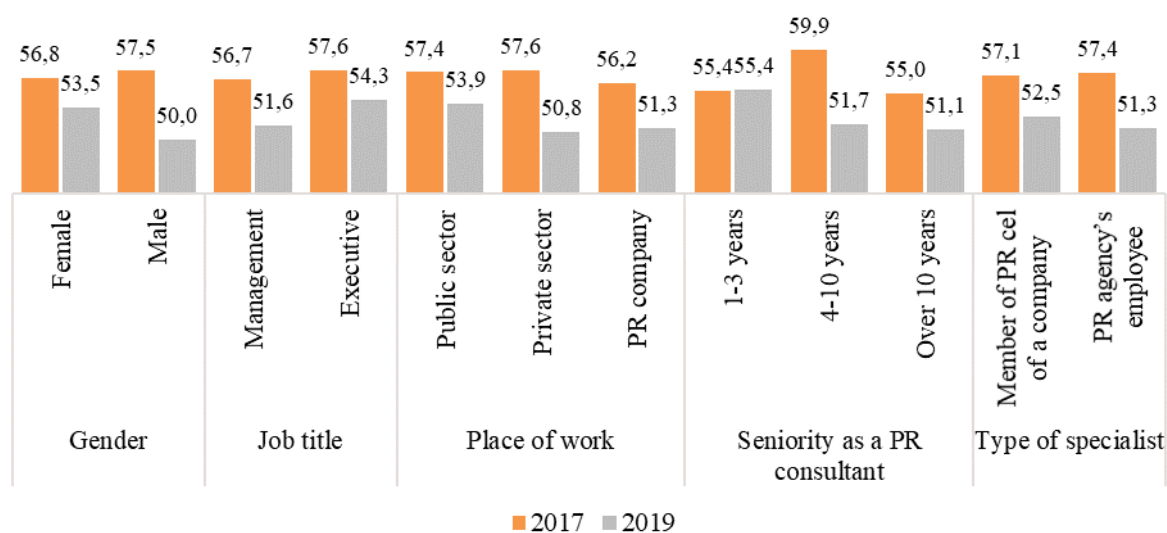


Fig. 3: PR industry condition index (in %) in relation to the profile of respondents

(Source: own study based on quantitative research in 2017 and 2019).

Another important conclusion that emerges from the intertemporal analyses is the high unanimity of the respondents regarding the assessment of the condition of the industry. The respondents' opinions are not influenced by factors related to the form of employment (position, place, and nature of work), but also by professional experience (seniority divided into three ranges). It can be assumed that the respondents speak with one voice, claiming that the condition of the industry is stable, although some of its components require improvement. All values presented in chart number 3 range from 50 to 60%, each time it is a range covering the third of the adopted interpretation intervals.

Interesting information can be found in the analysis of seniority as a continuous variable (expressed in years). An attempt to explain the changes in the assessment of the condition of the PR industry in 2019 using the above variable allowed to obtain a significant linear regression model [Model: $F(1, 221) = 3,358$; $p < 0,1$; $R^2 = 0,015$]. Therefore, it can be seen that with each successive year of work in public relations, the assessment of the condition of PR decreases by an average of 0,21 points. For example, the prediction for a person with 5 years of work experience would be 53,2% (industry condition assessment), a PR person with 15 years of experience in the industry would receive an indicator of 51,2%, and a person working in PR for 30 years (a veteran in the context of the history of PR development in Poland) - 48,1%. Generally, with the increase in professional experience, negative assessments appear more often in the context of the diagnosis of the condition of the PR industry in Poland ($\rho = (-0,134)$; $p = 0,045$; $n = 223$). The breaking point, beyond which the industry condition indicator goes to the lower of the designated interpretation ranges (the situation requires a significant improvement), is the 20-year work experience in PR mark (based on the 2019 edition). People with richer professional experience see more problems, challenges, and threats. This is because they look at their industry from a broader perspective, often already working in the PR department of the organization, as well as in an agency or scientific unit, e.g. as an academic teacher.

Summary

The first two editions of the research on the condition of the PR industry in Poland were aimed at identifying the long term trends and analysing weak and strong areas related to the work of a PR specialist. The next editions will increase diagnostic capabilities. It is planned that the data for the PR condition barometer will be collected and updated every two years.

In the assessments of Polish PR specialists, there is a certain scepticism regarding the direction of development of the PR industry in the future. It is worth remembering that the research was conducted a year before the coronavirus pandemic, which the global economy is currently facing. Therefore, the next round of research may cause the PR industry health indicator to regress even more. In 2017, the ratio fluctuated at 57%, and after two years it dropped to 52%. A similar trend concerned the assessments of individual components of the indicator. In each case, better values were recorded in 2017, and this is most evident in the context of opinions on the availability of professional staff on the PR services market (a decrease of 0,40 points on a scale from 1 to 7). We can currently speak about a greater risk than in the next edition of the research project, the condition of the PR industry will not be described as stable with few areas needing close monitoring, but one needing drastic improvement.

When constructing the PR industry condition indicator, 10 key factors were taken into account, which was adapted to the adopted evaluation system and measurement method, so that it was possible to get a more complete picture of the condition of the PR industry. The choice of these factors was selected in such a way that all respondents (regardless of the place of employment and specificity of work) could reliably assess a given aspect. The responses of the respondents are characterized

by a high unanimity of views in relation to the assessment of the condition of the employment sector (each time they were rated at 50-60% between 2017 and 2019). Despite the agreement of opinions, it is worth noting that in 2019 there was a negative correlation, where an increase in the value of one feature (number of years of work in PR) is accompanied by a decrease in the average values of the other feature (the level of the PR condition indicator). Based on the predictive model, it can be concluded that with each successive year of work in public relations, the PR condition indicator decreases by an average of 0,21 points on the adopted scale of 0-100%.

Among the analysed aspects of the condition of the PR industry, the least effective one requires special attention, especially if the opinions from both editions of the research coincide in the context of the hierarchy of problems. The proper functioning of the PR industry to the greatest extent - according to the surveyed PR specialists - is disturbed by the issue related to the Polish education system, which is unable to optimally prepare young people for the profession. The above problem was pointed out by 47% of PR people in 2017, and two years later this percentage was higher - 54%.

However, it is worth remembering that in our 2019 research, only 14% of respondents had completed public relations studies. Critical opinions could be the result of lack of access to sufficient and expected PR education and top-down regulations (e.g. lack of formal skill verification or certification), and not from a low level of education on PR studies. Such a pattern of reasoning confirms the fact that people who completed this type of studies given a higher average when assessing the educational aspect as one of the tested dimensions of the condition of the industry.

Other nationwide surveys among the public relations community show that PR consultants and specialists are well educated. This does not mean, however, that PR specialists have completed PR studies. The report "Public relations professionalism in Poland" shows that almost 98% of respondents have higher education, but as much as 22% of the knowledge needed to work as a PR specialist was acquired on their own (Olędzki, Wojcik, Hope, & Barlik, 2019). An analysis of the biographies of Polish PR specialists confirms that other fields of study are very popular, including journalism, management, marketing, Polish philology, political science, sociology, international relations, law, economy (Łaszyn, 2016). It is also estimated that nearly 35% of specialists in PR have completed studies, but they had no relation to public relations. The lack of theoretical preparation for the profession is declared primarily by people responsible for public relations activities in non-governmental organizations - 51% (Tworzydło, Szuba & Żuchniewicz).

When answering the research question regarding the determination of the direction of changes in the condition of the PR industry, two issues should be distinguished in the diagnostic system. The first is the value of the PR health indicator itself, which has decreased significantly (from 57 to 52%), indicates a number of different problems and challenges that the industry is facing. The main point is that the surveyed PR specialists in 2019 paid more attention to the difficulties in finding competent employees, low awareness of clients in the field of PR activities, or lower demand for services described as public relations. However, bearing in mind the second element of the diagnosis system, which are the interpretation intervals developed in 2017 (graph 2), a downward trend is also visible, but the condition of the PR industry remains at the lower end of the same range - the situation is stable but requires improvement in select areas.

The idea of updating the data as part of the PR condition barometer can support both people who are taking their first steps in the industry, as well as specialists representing various segments of Polish public relations with many years of professional experience. Trend analysis can contribute to a broad debate on the condition of the industry, in which both industry organizations, as well as academia, should definitely be involved because within the condition indicator, anyone can find some helpful tips. It can also be the basis for international analyses.

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