
The Condition of the Public Relations Industry in Poland: Current Situation and Threats Related to COVID-19

Submitted 02/08/2020, 1st revision 14/09/2020, 2nd revision 21/10/2020, accepted 15/11/2020

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Abstract

Purpose: The most important research objective of the project described in this article is to examine the condition of the public relations (PR) industry in Poland in the context of changes taking place in the economy in connection with the COVID-19 pandemic.

Design/Methodology/Approach: The research referred to a study conducted with the use of an auditorium survey in April 2019. The research sample consisted of 253 PR consultants, from various companies and organizations operating in Poland. The second project was a study aimed at understanding the impact of the coronavirus pandemic on the PR industry. 242 PR industry specialists were examined in this project.

Findings: PR specialists in Poland are aware of the challenges and understand how to support companies and institutions affected by the crisis and operating in a changed reality. In our research, six areas have been defined, which may provide a new direction for the PR agency when preparing the service offer. Most of the respondents believe that a PR agency's potential clients will seek external help in communication services like media relations, digital PR, crisis management, lobbying, public affairs, event management, and influencer relations.

Practical Implications: The article presents real and representative opinions of the public relations community expressing concerns and defining the directions of changes caused by the COVID pandemic.

Originality/Value: The article presents the most recent and up-to-date research results on the condition of the PR industry in Poland, which is an important element of the European public relations market. The obtained research results are representative for Poland.

Keywords: Public relations, social communication, PR managers, PR industry, COVID-19.

JEL codes: M13.

Paper Type: Research study.

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1. Introduction

Defining public relations has been causing many problems for decades. This is mainly due to the wide range of implemented activities within the framework of PR and the wealth of available communication tools.

Public relations is sometimes defined through the prism of a multitude of goals (Seitel, 2016; Gordon, 1997), target groups and participants of the communication process (Harlow, 1977), industries and sectors in which it is applied (Tworzydło, 2017; Gawroński, 2013), communication roles (Larsson, 2007), models and patterns of conduct (Grunig and Hunt, 1984), ethical determinants (Bowen, 2007; Parsons, 2015), relations with marketing communication (Kotler and Mindak, 1978; Pavlů, 2013), related disciplines and links with journalism (Łaszyn 2015) and many other factors. It is also closely related to such notions as image and identity (Tworzydło, 2019). As a result, countless definitions of public relations emphasize the above assumptions.

One of the less frequently undertaken areas of defining PR is regionalization. North American academics and practitioners dominated public relations in the 20th century. In 2000, more than 3,000 universities in the United States provided public relations courses - more than in the rest of the world. Two American PR practitioners (PRSA - Public Relations Society of America and IABC - International Public Relations Association) had more members than the International Public Relations Association (IPRA). According to Wilcox in "The Landscape of Today's Global Public Relations," in the first half of the first decade of the 21st century, Reed's Worldwide Directory of Public Relations listed 200 professional public relations associations in 70 countries, with a total membership of 150,000 people.

Besides, the Global Alliance of 60 organizations from different countries estimated that about three million employees worldwide practiced public relations at the time as their main professional activity. In the UK, there are an estimated approximately 50,000 PR practitioners in the same period. By contrast, in its report, the United States Department of Labor estimated that there were approximately 200,000 PR practitioners in the United States by 2006 (Wilcox, 2006). The main textbooks, practical studies, and academic press still come from the USA.

From a practical point of view, the global public relations market was managed mainly by American agencies (Verčič *et al.*, 2000). In the light of the International Communications Consultancy Organization (ICCO) report, it can be seen that in 2018 the list of the world's largest PR agencies was dominated by those based in the USA, as they constituted 46% of the entire ranking. The United Kingdom was the second largest PR agencies market, with a result of 18%, followed by Germany with 7% (ICCO, 2018).

2. Literature Review

The literature on the subject indicates that PR is significantly influenced by globalization. Globalization is often viewed as an additional variable, or even an addendum or subset, that challenges existing public relations theories, mainly because such theories were developed and constructed to explain social realities within specific cultural settings (Valentini *et al.*, 2016; Sriramesh and Verčič, 2009). Over the past twenty years, a limited but still-evolving set of knowledge has emerged regarding the issue that we call "global public relations." In the context of increasing globalization, one of the new challenges that public relations practitioners have to face is meeting the needs of an increasingly diverse and international audience (Ruler *et al.*, 2004). Nevertheless, the need to distinguish the specificity of public relations in Europe, in opposition to the American way of treating this profession, is becoming increasingly clear.

Following the American standards, the strength of European PR is growing. PR associations located in developed European countries play a leading role in the global public relations network. The European reach of these organizations is constantly expanding due to entities' willingness to participate in international and regional associations as members or partners. The central position of European associations in the global network suggests that they will increase influence on the development of public relations in other countries (Yang and Taylor, 2014). Verčič *et al.* (2001), in their research, concluded that taking care of linguistic and cultural peculiarities is directly relevant when defining public relations.

As long as the English language, PR practice, and theory in the United States are the only sources of conceptual work in public relations; the profession will be devoid of global inclusiveness. The researchers concluded that the bond connecting the American and European views on defining public relations is that "a social discipline should rather than search for a phenomenon to legitimize its existence, search for a special view it brings to our understanding of the world." The similarities and differences in the American and European perspectives on public relations are also specifically reflected in the historical approach, as indicated by Rodríguez-Salcedo's (2012) study. European PR is also different from American standards in communication roles played by representatives of this industry (Fieseler *et al.*, 2009).

Public relations in Europe and the USA in the 19th century developed more or less simultaneously. In Europe - Germany, to be more precise - Carl Hundhausen was the first to use the term "public relations" in the sense in which it functioned today when he wrote an article titled "Public Relations" in 1937. Initially functioning German term "Öffentlichkeitsarbeit" did not manage to assert itself, as industry practitioners were not satisfied. For this reason, the term was relatively quickly changed to the American version of "public relations" or "PR" and quickly spread in European countries. The

fact that the American designation was adopted to denote public relations in Europe does not mean that the European industry's development was directly related to the development of PR in the USA. Although the first PR agencies were established in the USA, and American approaches and ideas crossed the Atlantic, PR practice development in the USA and Europe was separate. The difference was, among other things, in the main subject of interest. While European PR focused on reasons and motivations, the US has looked at effects.

However, there is no doubt that European PR drew from the American, and not the other way around (Nessmann, 1995). In most European countries, public relations is a flourishing industry, sometimes with a history of a least a century, and all over Europe young people like to become educated in the field. Nevertheless, little is known about crucial aspects of public relations in Europe, and so far, there is even lesser debate and knowledge exchange on these aspects (van Ruler and Verčič 2005).

This opinion, expressed over a dozen years ago, has lost little relevance, and PR education is still attractive, especially in Eastern European countries (Pevzner *et al.* 2018). The coming future and challenges are a recurring problem in all sectors of the economy. The public relations industry is not free from concerns. Recently, The Global Alliance for Public Relations and Communication Management pointed out that help is needed to "make the second decade of 2020 a period of renewal and growth for our profession, and to ensure that it is passed on to future generations in the best possible condition" (Dircom, 2020). Perhaps from the current crisis, due to the Covid-19 pandemic, the public relations industry will be strengthened, as both good or bad PR practices can be a factor determining the image of institutions, companies, and organizations.

Public relations can also be treated as a separate sector, constituting an important part of the economy, with its specificity and characteristics being different from other sectors. This is most clearly noticeable at the contact point between PR activities and mass media's influence (Gawroński and Jakubowski, 2018). Services in image and media consultancy, implementation of communication strategies, corporate social responsibility, and integrated marketing communication are located at the interface between marketing and the media sector. However, these services may also extend beyond this framework. The media's dynamic development means that "our everyday life is filled with the media," and this requires professional communication skills from PR specialists (Łaszyn, 2015).

Public relations is undergoing a process of professionalization in many countries. Professionalization of PR takes place when a specialized framework defines who is qualified to provide services related to public relations and broadly understood communication. Professionalization of counseling or journalism contributed to the consolidation of their role as valued societal functions, as consistent and high-quality

services are expected from these sectors' employees. Professional associations, often invisible to the public, play a key role in the professionalization process. They create normative values, standardize practices, and represent a unified identity of PR practitioners and organizations that use their services. (Yang and Taylor, 2014). The latest nationwide research conducted by the Social Team of Experts has confirmed the need to professionalize it. The vast majority of the surveyed specialists and PR consultants (60%) agree that the introduction of accreditation of PR specialists (i.e., confirmation of their qualifications by industry organizations) will raise the professional level of the PR industry in Poland (Olędzki *et al.*, 2019).

Public relations in Polish realities has a relatively short history. The development of this industry in Poland has been continued constantly since the beginning of the 1990s. At that time, the first PR agencies appeared on the market, and business started to pay more and more attention to the need to professionalize communication activities. In the first years after the political system transformation in Poland, companies experienced a shock related to the extremely high advertising effectiveness. Regardless of their quality, adverts could trigger sudden changes in demand and induce consumers to buy products or services.

After the initial goals assigned to the advertisements were no longer fulfilled, other solutions were sought to support the process of reaching the target environment (Ławniczak *et al.*, 2003). At that time, PR became a natural area of research in the possibilities of using it in business process management. This was largely due to the successes recorded in Western European countries and the United States. The past three decades have brought a radical change in Poland regarding both the approach to PR and the services provided. The main area of transformation concentrates around the sphere of tools used in PR and changes in managers' awareness. They are the ones who more and more willing to use advisory support.

It is worth noting that the catalysts for the evolution of public relations in Poland were the internationalization of the Polish economy, the development of the information society, and corporate social responsibility (Żbikowska, 2008). One should also remember about corporate PR development, which forced managers to pay more attention to dialogue and interactions (Zaborowska, 2011). The dynamics of changes in the PR industry is correlated with the development of modern information technologies. The Internet has become indispensable to running a business, strengthening, and accelerated industry changes (Alyaqoub *et al.*, 2019).

It is currently said that Poland's PR industry is still in the phase of intensive growth, although its pace is limited by environmental factors (Kowal, 2018). The list of challenges that a PR consultant must face, both in the Polish and global perspectives, is expanded by the progressive process of seeking cost optimization solutions. Especially in periods of disturbances in the business cycle, companies are forced to

limit or even completely cease their PR activities (ICCO, 2020). Important diagnostic elements based on which it is possible to conclude about the development of Polish public relations are the market realities (e.g., the participation of network agencies or indicators determining the industry's value) and opinions coming from the PR community itself. Precious opinions are those that allow a better understanding of internal conditions and industry trends. Therefore, the article cites research projects that touch upon the above subject matter.

3. Research Methodology

The article uses data obtained in two research projects designed and carried out by the authors. Key data based on the statistical description are quoted. The first project concerns the condition of the public relations industry in Poland. It has been carried out since 2017 by a team consisting of employees of the Department of Social Communication and Public Relations of the University of Warsaw and the Exacto public relations agency. One of the thematic blocks of the 2019 edition concerned the PR industry's challenges in Poland.

The used methodology was quantitative research, carried out using an auditorium survey in April 2019. The research sample (253 people) consisted of representatives of various entities and organizations operating on the Polish market. In this sample, 65% of respondents were women and 35% men. Considering their education, 1% of respondents had secondary education, 89% higher education, 10% Ph.D., or higher. Looking from the perspective of work experience in the PR industry, 23% of respondents have less than 5 years of experience, 28% from 5 to 9 years, 21% from 10 to 14 years, and 28% from 15 years of experience and more. When analyzing the question of the respondent's position in the organization, it was noticed that 25% of the respondents had an executive position, 54% an executive-managerial position, and 21% a managerial position.

Another important piece of information that defines the respondents is the place of their employment. 24% of respondents work in PR agencies, 4% in an NGO, 36% in private companies, and 36% in the public sector. The last analyzed category is company size. Thus, 14% of respondents work in entities having up to 9 employees, 23% in companies with 10 to 49 employees, and 15% in entities with 50 to 249 employees. The largest group - 48%, was represented by people employed in companies with over 250 employees. The selection of the sample was deliberate, although its application was to consider the opinions of the widest possible professional environment, hence such a large diversity in terms of the place of employment (economic, social, regional, or governmental institutions).

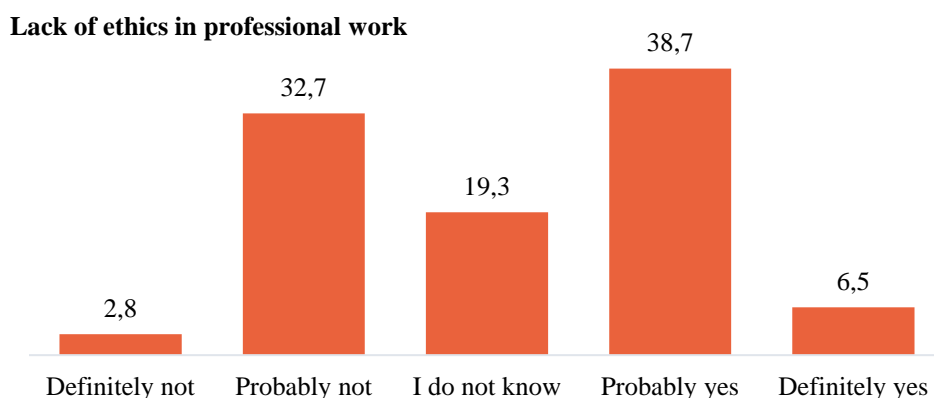
The second project evoked in this article was a study that aimed to understand the impact of the coronavirus pandemic on the PR industry and gather opinions on the

industry's future once the COVID-19 situation is under control. Public relations specialists were invited to participate in the project, both freelancers (9% of the research sample), academics (13%), employees of PR agencies (35%), and specialists in public relations employed in private enterprises (26%), state-owned entities (14%) or NGOs (3%). The research was conducted using the CAWI technique. The selection of the sample was deliberate and was conducted based on snowball sampling. The data was collected in April-May 2020, i.e., during the greatest restrictions recorded in Poland and other countries worldwide. Finally, 242 PR specialists took part in the project.

4. The Condition of the Public Relations Industry in Poland: Analysis of the Research Results

From the research conducted in 2019 during the Congress of Public Relations Professionals, several data can be obtained that align with the title of the proposed article. In particular, they relate to the challenges that the public relations industry must face at present, according to Polish PR specialists. Respondents were asked to address the list of issues. Their answers should be interpreted so that the higher the percentage of affirmative answers, the greater the problem we face in the opinion of PR specialists.⁵

Figure 1. Challenges facing the public relations industry in Poland in the context of ethical behavior of PR specialists (N = 248, data in%)

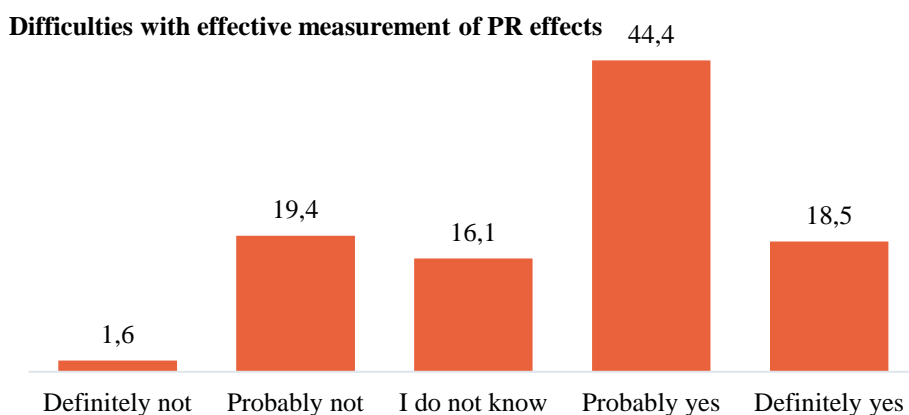


Source: Own research.

⁵The list of 31 challenges was diagnosed by the Exacto research team based on interviews with experts who represented the academic community - i.e. academics dealing with the subject of public relations and practitioners from various sectors (PR agencies, private companies, state-owned companies) and on the basis of ICCO desk research reports.

A different perception of issues related to the broadly understood ethics of PR consultants' activities has been the subject of numerous industry debates for years. This is also confirmed by the proportional and polar distribution of opinions of the surveyed PR specialists, who do not agree in their approach to ethics or its lack in the professional practice of people dealing with PR daily. Well, 45% of respondents consider the failure to comply with ethical behavior's values and standards as a challenge that the industry must face. It can be said that nearly half of the respondents see a problem providing qualified public relations services that lack the elements of ethics. Such views are most strongly expressed by people working in small companies employing 10 to 49 employees - 55% and people with completed PR studies - 50%. On the other hand, nearly 36% of all respondents were of the opposite opinion, and thus they do not consider PR specialists violating the principles of ethical behavior in their work, e.g., in business customer service.

Figure 2. Challenges facing the public relations industry in Poland in the context of measuring the effects of PR consultants' work (N = 248, data in%)



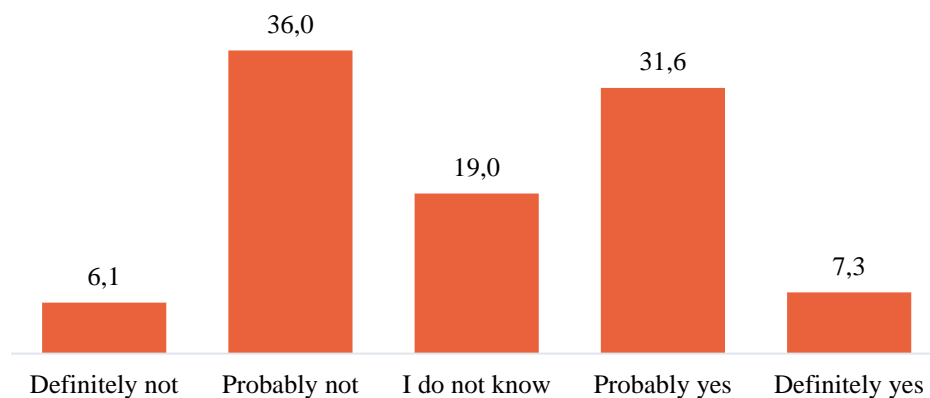
Source: Own research.

Our research has confirmed that conducting effective measurement of the effects of PR activities is a difficult task. A group of 63% of respondents considers this issue as a challenge facing Polish public relations. On the other hand, on average, one in five respondents was of the opposite opinion. However, this indicates a fairly high unanimity in the views of PR specialists. The vast majority answered affirmatively, regardless of the respondent's profile, i.e., gender, education, the position held, place of employment, company size, or seniority. It is worth noting that a relatively high percentage of indications were among PR agencies, which measurement of the effects has inscribed in the specificity of the conducted activity. In this particular case, as many as 68% of agencies admitted that effective measurement is a challenge in implemented projects or campaigns. The problem's scale is also confirmed by the record-high percentage of affirmative responses among people who completed PR

studies. Despite the experience gained in learning, they still encounter many difficulties in conducting effective measurement of PR effects.

Figure 3. Challenges facing the public relations industry in Poland in the context of the PR specialist profession (N = 247, data in%)

Low prestige of the PR specialist profession



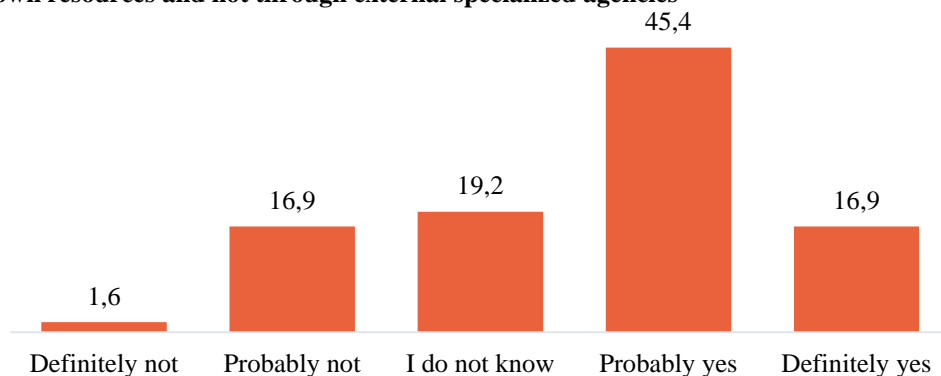
Source: Own research.

Strongly divided opinions among the respondents also concerned the assessment of the prestige of the PR specialist profession. 39% of the respondents agree with the statement about the low prestige of work in PR. This is also indicated as a challenge facing the PR industry. Nevertheless, 42% did not consider this a problem. Only in one section of the metric there was a relatively high unanimity of the respondents' answers. Well, respondents who graduated from PR studies more strongly emphasized that the low prestige of a PR specialist profession is a challenge for the entire industry - 57%.

Among people professionally engaged in PR but without completed studies in this field, the above percentage oscillated around 40%. It is worth quoting here other results of the survey, this time among the younger target group - students of the University of Warsaw who shortly intend to become a public relations specialist (the sample consisted of 277 students from the field of journalism and social communication with a specialization in public relations and media marketing). The results confirmed that only 6% of students responded negatively to the question, "How do you perceive the profession of a public relations specialist?" Despite a positive attitude towards their own career, the vast majority (61% of the surveyed students) believe that the profession, which they are very likely to perform in the future is characterized by a pejorative social perception, which is mainly due to the negative media coverage towards public relations (Przybysz, 2015).

Figure 4. Challenges facing the public relations industry in Poland in the context of changes in the PR services market (N = 249, data in%)

Increasing tendency to carry out PR activities using the company's own resources and not through external specialized agencies

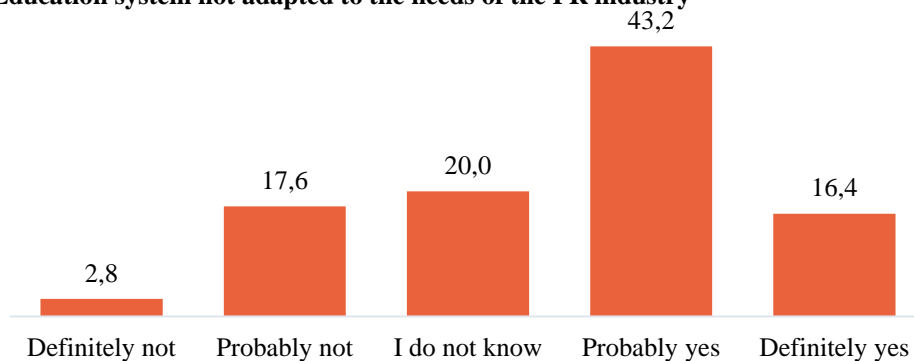


Source: Own research.

Most of the surveyed PR specialists (62%) consider the increasing tendency to carry out PR activities with the company's own resources, not by external specialized agencies, as a challenge for Polish PR. Interestingly, the above issue classification as a threat to the industry was more visible in the group of PR specialists representing companies from the public sector (72%). On the other hand, in the private sector, the percentage of affirmative responses was lower - 61%, while among PR agencies, it was relatively the lowest - 58%. It is an interesting observation because the examined claim directly touches on the specifics of the work of the last group (PR agencies), which seems not to notice the problem.

Figure 5. Challenges facing the public relations industry in Poland in the context of adjusting the education system to the needs of the PR industry (N = 250, data in%)

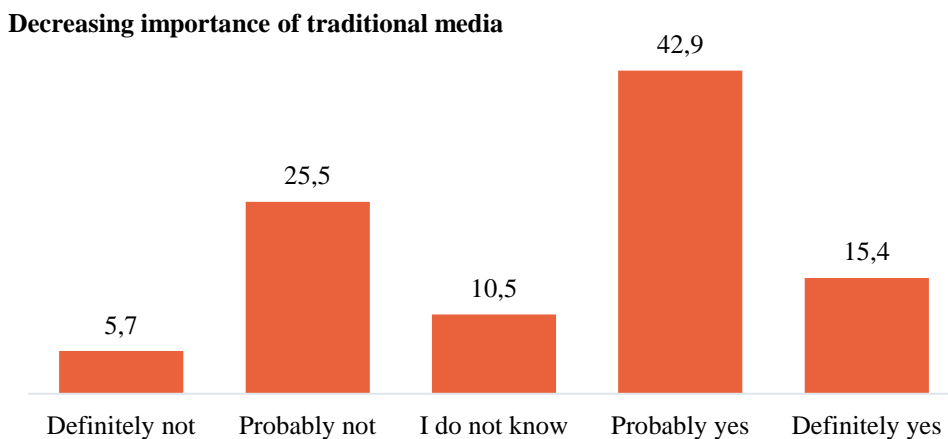
Education system not adapted to the needs of the PR industry



Source: Own research.

As many as 60% of the respondents believe that the education system preparing for the profession of a PR specialist is flawed, as it cannot adequately prepare young adepts for work in the PR industry. To make matters worse, such views are intensified within the group of people who graduated from PR studies (70%), as well as among people holding managerial positions (67%) and representatives of PR agencies (68%), which indicates the severity of the situation. Additionally, the percentage of affirmative answers increases with the work experience of the respondents (from 54% in the group of people with PR experience below 5 years, by 57% in the group with 5-9 years of experience, 60% in the group with 10-14 years, to 68% among the most experienced PR specialists who have been associated with the industry for 15 years or more).

Figure 6. Challenges facing the public relations industry in Poland in the context of the situation on the media market ($N = 247$, data in%)

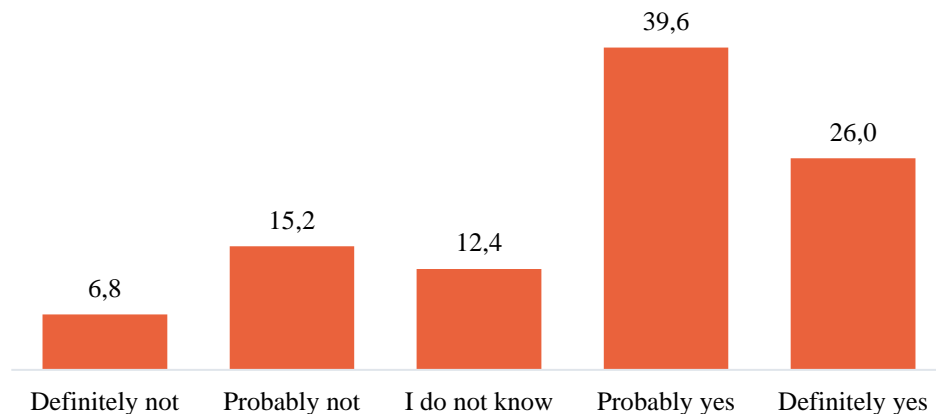


Source: Own research.

The connection of a PR specialist's work with the public and the media environment is solid. The press activity itself is a key element in the development of PR (Wojcik, 2005; Łaszyn, 2015). Therefore, the decline in the importance of traditional media in network development and the need to be "online" strongly affects the public relations industry's condition. This is confirmed by our research results, as 58% of respondents are willing to consider the above issue as a challenge that the entire PR industry must face. Only every third interviewed PR specialist was of the opposite opinion. It should also be remembered that progressive and, at the same time, unfavorable changes in the image of public relations in Poland are intensified by stereotyping and the attributional bias what in this case means that the image of PR is bad because the public tends to assign negative features to it and do not take into account the positive ones (Aronson *et al.*, 1997).

Figure 7. Challenges facing the public relations industry in Poland in the context of the development of new technologies (N = 250, data in%)

Orientation towards new technologies and digital communication



Source: Own research.

A significant challenge faced by the PR industry in Poland is the need to use new technologies and efficiently manage large data sets. The results showed that as many as 2/3 of the respondents considered issues related to searching for new channels of reaching recipients, the dynamic development of new media, artificial intelligence, and big data as a challenge facing the industry. Also, every fourth answer (26%) was an absolute “Definitely yes.” However, it should be remembered that new technologies are applied in many sectors of the economy, and not only must the PR industry learn how to use them properly. Hence, it also does not change the fact that communication processes are now based mainly on the broadly understood digitization. Therefore, it is not surprising that the record high percentage of affirmative responses among PR specialists (78%) responsible for communication in large organizations, where employment exceeds 250 people, considered the discussed subject a challenge for Polish PR.

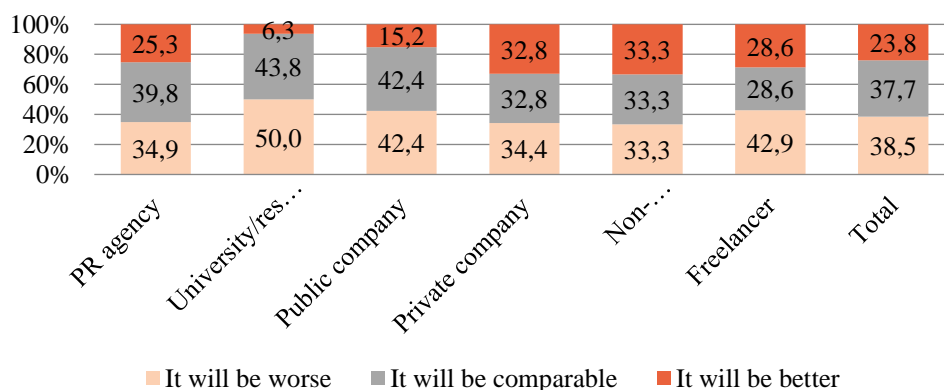
5. Challenges of the Public Relations Related to the COVID-19 Pandemic

The examples of the challenges discussed earlier concerned the situation before March 4, 2020, when the first case of coronavirus infection was confirmed in Poland. The situation has changed dynamically since then. The pandemic caused many changes in all areas of social and economic life. It influenced relations, but also methods and techniques of communication. It had a significant impact on the public relations industry as well. Especially in the events management area, the pandemic deprived some of their incomes' public relations agencies. The directions of clients' activities and needs have also changed, as they have reshaped their expectations towards communication advisers. The research conducted during the lockdown shows the

most important changes that have taken place in the PR industry, as well as the directions the sector will follow in the coming years.

The respondents were asked about the future of the industry after the coronavirus pandemic. The chart below shows how the changes taking place in the PR industry will look like (divided into individual groups of respondents).

Figure 8. *In your opinion, what will the future of the PR industry look like after controlling the coronavirus pandemic concerning the state before its appearance? (N = 242, data in%⁶)*



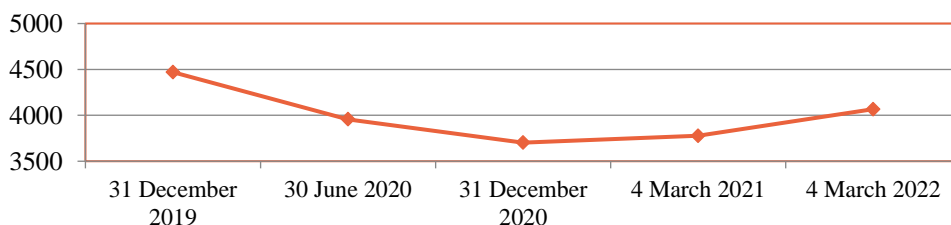
Source: Own research.

As many as two out of five surveyed representatives of the PR industry (38.5%) see the industry's future unfavorably, compared to the situation that took place before the occurrence of the coronavirus pandemic. The respondents are mainly concerned about the need to maintain the situation related to the change of working mode – introducing a home office. They are also afraid of a significant reduction in employment among PR consultants.

The respondents also pointed to other changes regarding the PR services market, e.g., a decline in demand for specialized services (37%) or the need to look for a job in a different industry (12%). Academics (half of the respondents within this group) and freelancers (43%) identify themselves most strongly with the claim that after mastering the pandemic, "it will get worse."

⁶Data is rounded. Rounded values may not add up to 100%.

Figure 9. Forecasts of Polish PR specialists in the context of changes in the public relations market in terms of the number of companies under PKD⁷ no. 70.21



Source: Own research.

Knowledge about the PR industry's condition in the pandemic time is also provided by PR specialists' forecasts regarding the change in the number of companies that conduct activities related to public relations. At the end of December 2019, according to the REGON register, there were 4,470 companies on the Polish market, which included human relations, public relations, and communication as their main activities. Based on the above value (initial state), the surveyed PR specialists were asked to estimate how this number would change during and after the coronavirus pandemic (four different time intervals included in the survey). Their forecasts indicate that the number of companies will decrease dynamically.

At the end of 2020, there will be as much as 17% fewer companies indicating interpersonal relations, public relations, and communication as the main area of their activities compared to the state from before the coronavirus crisis (the average calculated for the entire sample is 3703). On the other hand, a year after the appearance of the first case of COVID-19 in Poland, the public relations market's situation should start to improve, although a return to the pre-pandemic state even at the end of 2022 is, according to the respondents, unlikely. Generally, Polish PR specialists predict unfavorable trends on the market.

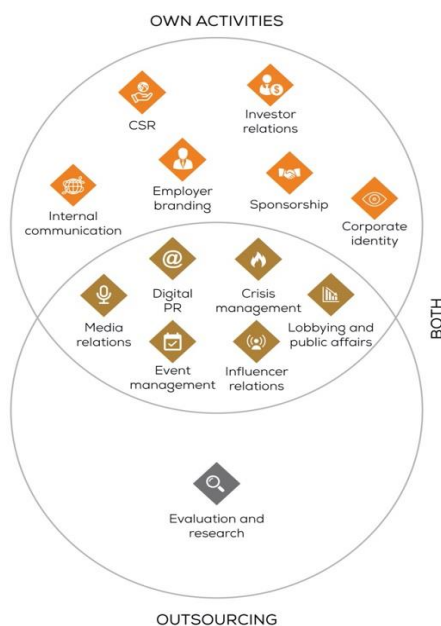
6. Business Strategies after the Pandemic is Over

Organizations can carry out public relations activities on their own or an outsourced basis. We wanted to check which strategies will be adopted by companies after the coronavirus pandemic through our research. PR experts forecasted what changes the industry might expect in terms of the services at the time of the pandemic. The respondents' task was to assign 13 main forms of activities qualified within public relations to one of four categories, which reflect the scope of the companies' operation

⁷ Polish Classification of Activities.

and their communication orientation (passive vs. active approach). In general, despite a deep internal reshuffle, the PR market is assessed steadily.

Figure 10. PR Services Market in Poland after the Coronavirus Pandemic - Main Trends



Source: Own research.

According to experts, Polish enterprises will continue to use specialized agencies mainly when it comes to services related to six areas. These include: media relations (51%), digital PR (45%), crisis management (44%), lobbying and public affairs (38%), event management (37%) and influencer relations (33%). In addition to external investments, companies will also allocate their own resources to implement the above-mentioned activities, e.g., internal PR services. This means the highest level of engagement, and consequently, the allocation of high budgets. In the context of the current situation, only these six areas have been classified (based on the relatively high percentage of indications within the tested area) as strategies involving conducting activities by companies on their own and outsourcing them outside.

Activities related to research, conducting research projects, and evaluation are the only areas that companies will delegate for implementation outside the organization (36%). On the other hand, internal communication (79%), CSR projects (53%), employer branding (53%), investor relations (50%), sponsorship (43%), and corporate identity (39%) will be carried out without external support. The respondents are aware

that companies (and therefore, their current and/or potential customers) will strongly strive to implement activities based on their own resources. It is worth noting that none of the 13 tested communication areas received the relatively high percentage of indications within the “no such activities” answer. This proves quite an optimistic approach in forecasting changes in the PR market by the surveyed specialists. Relatively the worst situation concerns activities related to the organization of events; as many as 19% of respondents believe that companies will completely abandon activities in this area, even after the pandemic ends. A similar percentage (18%) concerned sponsorship, which is also based on the organization of mass events and generates considerable expenses.

7. Conclusion

The global Covid-19 pandemic has hit the public relations industry hard, but there is no question of a collapse. PR specialists are aware of the challenges and understand how to support companies and institutions affected by the crisis and operating in a changed reality. Of course, it is easier to come away unscathed from the crisis for those agencies specializing in building relations with the external environment and widely understood crisis advisory services. Companies that provide services to customers from industries most affected by the economic crisis, such as tourism, transport, automotive, gastronomy, or trade, have a more difficult task. The media statements and forecasts of communication experts usually refer to the fact that clients' first choice in the context of investment in PR will be media relations and influence marketing activities (Wirtualne Media, 2020). This clearly indicates that the strategy of efficient budget management is being implemented.

However, in our research, six areas have been defined, which may provide a new direction for the PR agency when preparing the service offer. Most of the respondents believe that a PR agency's potential clients will seek external help in communication services like media relations, digital PR, crisis management, lobbying, public affairs, event management, and influencer relations. Additionally, each of these areas should be supported by its own activities, e.g., using internal PR services.

When diagnosing Polish PR's condition, it is worth paying attention to the research conducted by the Association of Public Relations Companies (ZFPR) among the leading PR agencies in Poland (members of ZFPR). The economic picture of the PR services market that emerges from these studies shows that the effects of the crisis in the PR agencies sector are noticeable. However, companies at the same time are coping with the situation and actively striving to return to the development path (the situation before the outbreak of the pandemic). The biggest drops in revenue are recorded by small agencies, which employ up to 20 people. In this case, the loss of a few regular customers is strongly felt and often even hits the PR services market's stability. Nevertheless, regardless of the number of employees, half of the surveyed

agencies belonging to the Association of Public Relations Companies estimate that they will lose no more than 10% of their permanent contracts during the pandemic. There is more optimism about maintaining financial stability, as 80% of agencies do not consider the scenario of becoming insolvent. Positive opinions in financial liquidity prevailed among the respondents, even though 30% of companies introduced wage cuts for their employees, and 38% of agencies reduced employment (ZFPR, 2020).

Generally, companies belonging Association of Public Relations Companies (approx. 40 entities from all over Poland) positively assess the development perspective and the level of achievement of business goals during the pandemic. In our research, however, we surveyed representatives of associated PR companies (showcases of Polish PR) and smaller agencies and self-employed people that provide services qualified under public relations. From this perspective, one cannot speak of overly optimistic and sentiments in favor of a stable assessment of the business situation. Well, the group of agencies and freelancers we surveyed, when asked, "What do you think the future of the PR industry will look like after the coronavirus pandemic is under control compared to the state before its appearance?" more often answered that it would be worse than better. Interestingly, the relatively high percentage of skeptics was among specialists in public relations working at universities and research centers (half of the surveyed academics answered that it would be worse, and only 6% were of the opposite opinion).

How public relations specialists define reality (especially in the era of a pandemic) can also be linked to other conclusions drawn from our research. It is about the characteristics of the challenges that the PR industry has to face. The respondents pointed out that the education system requires changes, which must better prepare people to work as a PR specialist. Nowadays education system is not sufficiently adapted to the preparation of human resources suitable for companies from the industry. Young PR specialists basically have to start over after graduation. During their studies, what they learned is not a sufficient basis to build their position in a competitive labor market.

An equally important element that shapes the public relations industry in Poland is the issue of ethics. It is the starting point for many debates and studies from academic circles. The lack of compliance with the values and standards of ethical behavior by several PR practitioners in Poland is a challenge that the industry must face (on average, every second surveyed PR representative thinks so). Some perceive ethics as an academic education element that does not work in practice due to several determinants that force professionals to be flexible about customer needs. Moreover, this flexibility is sometimes associated with crossing borders, including ethical ones. The conducted research also shows that it is still a problem for PR specialists to measure the effects of PR activities effectively. This is due to the lack of knowledge

in this area and the implementation of projects in a simplified formula, without specialists dealing with, e.g., advanced statistical analysis. It is worth mentioning that conducting research projects and evaluation is the only area that, according to PR specialists' predictions, is associated with the complete outsourcing of activities. Of course, entrusting research to external entities involves considerable expenses, especially when we want to get a broad picture of the situation on large research samples.

The pandemic caused many changes in all areas of social and economic life. It influenced business relations, methods, and techniques of communication. It has a significant impact on the public relations industry. It deprived some public relations agencies of incomes, especially those entities that relied on the organization of events. The business directions and needs of clients who have different expectations towards communication advisers have also changed. The conducted research shows the most important changes in the PR industry and the directions in which the industry will follow in the coming years.

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