

The Changing Trend of PR Globally – An Agency Perspective

February 2019



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Foreword

The International Public Relations Network (IPRN), a global organisation of established, independent and respected PR agencies with a wealth of experience and knowledge, has conducted a survey to better understand the ever-changing landscape of communication.


The purpose of the survey is to identify the global trends in 2019, and to highlight the regional differences between nations. While there are plenty of new insights in this report, one of the key findings is that the role of traditional PR and communication is changing because of the influence of digitalisation. So, the survey investigates how our partners in the IPRN are managing the integration of digital communication, in order to maximise the opportunities these new challenges bring.

To get a truly global insight into the development of PR, the survey has been shared with all the members in IPRN and the results from North and South America, the UK and Europe, Scandinavia, South Africa, Russia, China, the Middle East, India and Australia have been combined to give this worldwide perspective.

The results of the survey provide interesting and in some cases, surprising insights. Collectively these will help PR agencies around the world understand the role of PR, how it is changing but most importantly, how it continues to be an instrumental part of effective communication.

Regardless of these changes, the core function of PR at a global scale gains recognition and continues to manage, support and protect an organisation's reputation and build good relationships with stakeholders.

Luis González Canomanuel, President IPRN



Travel is to make a journey or to have an adventure to
somewhere by bicycle, train, airplane, car, motorcycle, or
boat. It could be an exploration to somewhere new planned
or unplanned to meet new people, new things and new
places. There are different types of adventures waiting
for you to explore.

There are lots of places to explore. Places could be urban
or suburban. Some people loves to be with nature to fres
their minds and refresh their souls, but some like to be
in the city. You will get lots of benefits such as explor-
ing new culture.

The Changing Landscape of PR

Key insights

- **58%** of respondents see that **digitalisation** is the biggest change in the PR landscape - this includes the increase in online media and the use of new technologies
- **75%** are tackling the challenge of digitalisation head on by **creating digital in-house teams**
- **Integration of PR and Marketing** is both a challenge and an opportunity and this is a key consideration for IPRN members and their clients
- **86%** of IPRN members say that their clients are expecting PR to have a more **direct impact on sales**
- **87%** of the IPRN members are using **video content** in their PR strategy
- **Maintaining trust and reputation** is more important than ever with fake news and the speed of news threatening these core principles.
- **63%** of respondents are planning to enhance their **digital and social media skills**
- Only **8%** recognise the growing importance of **Dark Social**
- **Traditional PR skills still remain important** for the communication landscape
- **50%** plan to **strengthen the traditional PR skills** such as Media, Opinion Leaders and Influential Relations

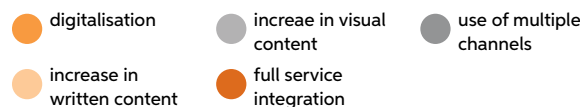
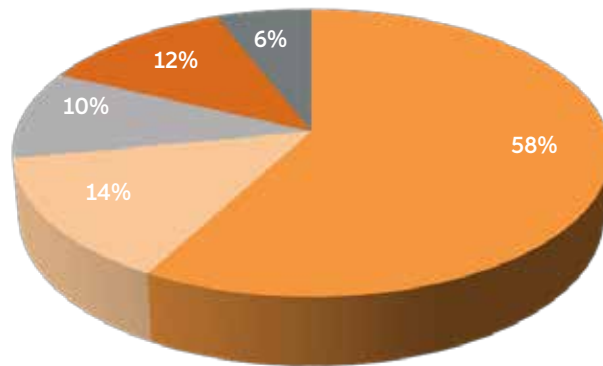
 58% of the agencies surveyed see that digitalisation is the biggest change in the PR landscape 

The changing landscape of PR

To get a greater understanding of the changing landscape of communication, the IPRN was interested to find out the biggest change in PR over the next five years.

58% said that traditional PR is changing due to digitalisation. The digital transformation affects the media (decline in printed media), technology (Big Data) and budgets as PR agencies experience an increasing re-allocation of marketing budgets towards digital communication. "Digital and social media are completely changing traditional PR" explained Francesca De Feo, IMC, Italy and Kieran Powell, from Channel V Media in the United States stated "PR agencies will become communication agencies focusing much more on integrated campaigns and managing multiple channels rather than just PR."

the biggest change in PR we can expect to see in the next five years



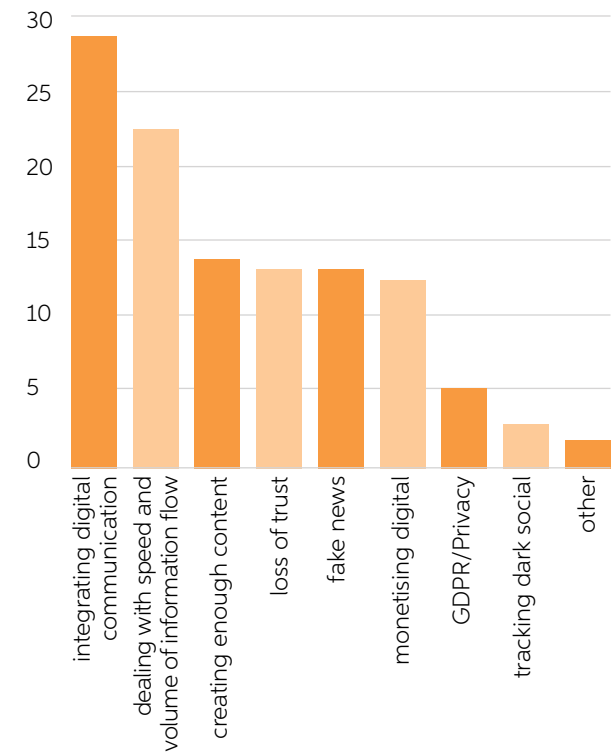
"The scenery of the media is changing as many of the titles are disappearing. The increase in social media and the way audiences source information are major contributors to the change too" explained Ana Maria Matulic from Headline PR in Chile. And similar comments were echoed by Amaury Bataille from Monet et Associés saying the "move from traditional support to digital and the impact of social networks" are changing the landscape of communication forever."

PR agencies will become communication agencies focusing much more on integrated campaigns and managing multiple channels rather than just PR

Kieran Powell, Channel V Media, USA

With 74% of respondents saying that integrating digital communication is the biggest challenge they face, new strategies and priorities are being introduced to achieve this. Some of the agencies are upskilling and directly incorporating digital skills. Simone Esamie from Write Away, Australia explained that they are "building in house expertise in design, digital and social" to ensure they can plan and implement integrated campaigns. Nie Capper, Mango-OMC, South Africa said "deepening relationships with the media to collaborate on digital and traditional strategies, educating the clients in the difference between paid, owned and earned media, partnering with exceptional digital marketing agencies to outsource specialist skills and investing in technology

biggest challenges of the changing landscape of PR



so that we can provide services such as social listening are collectively helping us manage the challenge of the changing landscape". Anishkaa Samit Gehani, Yardstick Marketing Management, Middle East said: "we now offer integrated marketing solutions where we also propose traditional advertising, along with digital and moving content such as videos."

Peter Haddock, Edson Evers, UK explained: "we focus on creating multiple content opportunities and making every story or opportunity work hard. We work with key influencers and stakeholders in the real and digital world building classic relationships across different platforms. Additionally we make inroads into working with industry

percentages are based on the number of responses received

We now offer integrated marketing solutions - where we also propose traditional advertising, along with digital and moving content such as videos

Anishkaa Samit Gehani, Yardstick Marketing Management, Middle East

leaders and commentators to share their vision with our clients and make our PR more compelling.”

Another strategy adopted by many members to overcome the changing landscape is to continue “building strong relationships”. 24% of those surveyed stated that maintaining trust and building relationships will help retain clients. For example Liz D'Oliveira, Redwood, UK said: “Building great client relationships and being custodians of client brand/reputation in every area will help retain clients.”

But there are other pressures that are considered to have a negative impact on the changes in the PR landscape and these are largely related to the increase in fake news, loss of trust, and the volume and immediacy of news. In

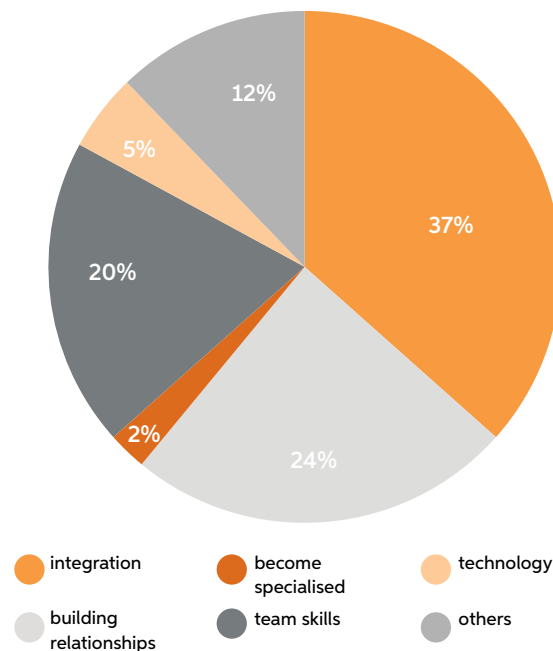
Building great client relationships and being custodians of client brand/reputation in every area will help retain clients

Liz D'Oliveira, Redwood, UK

China the biggest challenge is how to maintain trust and reputation when fake news and the general speed of news are common place, as Ye Wang from Blue Focus, China confirmed with her comment “speed replaces truthfulness”. “Fake news affects trust” said Monique de Saint Malo, Stratego Communications, Panama and Inna Anismova, PR Partner, Russia added that “many agencies use fake news, therefore trust is less important than speed for some”.

However, importantly, on a scale of 1-5 with 5 being most important, the respondents scored the integration of PR & Marketing 4/5. The closer alignment of PR and Marketing leads to the fact that 86% of the IPRN members are under the impression that the clients are expecting PR to have a more direct impact on sales. Cheng Guo, Blue Focus, China said: “Today PR means reaching out to target audiences through campaign based PR which can be promoted easily on digital platforms. Traditional media is losing its steam. The time is not far off when clients will want strategies that can be growth drivers for their sales.”

strategies to overcome the challenges



Even though PR methods are evolving constantly, PR values remain unchanged - the clients value reliability, transparency and trust the agency to build their reputation

Anna Lozinska, Crest Communications, Czech Republic

PR values

As a network of agencies, one of the key things we were interested in was to understand how traditional PR was perceived and valued by clients across the globe. On a scale of 1 to 5 with 5 being the highest, the survey indicates that traditional PR is still valued, scoring 4/5.

The survey stated that 80% of IPRN members felt that PR values have changed. However, further analysis of their comments revealed that the values haven't changed but the order of importance of these values has.

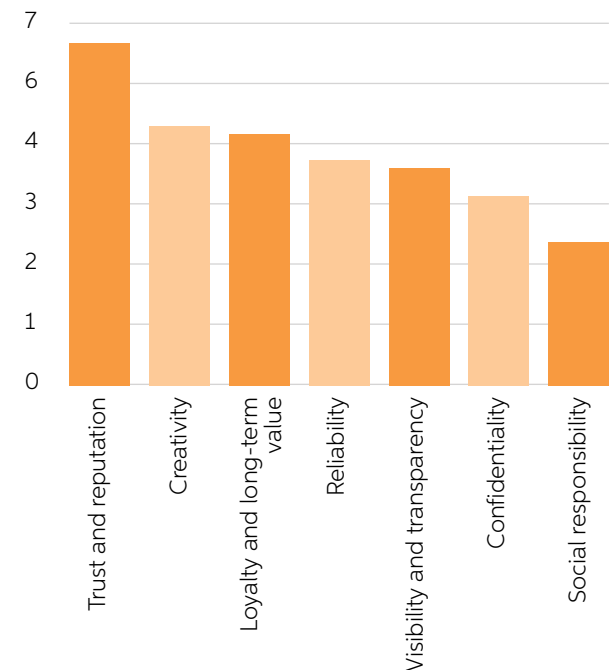
For example, Anna Lozinska, Crest Communications, Czech Republic said: "Even though PR methods are evolving constantly, PR values remain unchanged - the clients value reliability, transparency and trust the agency to build their reputation" and Zara Lintin, McOnie, UK said "the core values haven't changed but what the clients want have."

Chen Guo, Blue Focus, China agreed saying "there are still the same factors but the order has been changed e.g. people are valuing trust more due to privacy infringement incidents."

The increase in fake news coupled with the immediacy of news means that trust and reputation are more important now than ever before because of these new issues. Anne Courtois, BPR France, France said: "Consumers today are well informed and so companies need to demonstrate good ethics and be transparent. Reputation is key. This is especially the case in a 'fake news world' and a social media environment." Consequently the survey shows that 66% of agencies have ranked trust and reputation as the most important and that this value has a high global significance ranked as most important by members in China, South America

and most European countries. Moreover, the bar chart shows other important values include creativity, loyalty and long term value. Another obvious trend is that 10 agencies have ranked confidentiality and social responsibility as the least important PR value. However there are some agencies, namely those based in Finland, United Kingdom, France and Luxembourg, who see confidentiality as the most important PR value. This differentiation demonstrates that several factors can influence PR value and this includes the nation's culture, the agencies ethos and the industries the agency operates in.

importance of the following PR values





percentages are based on the number of responses received

PR skills

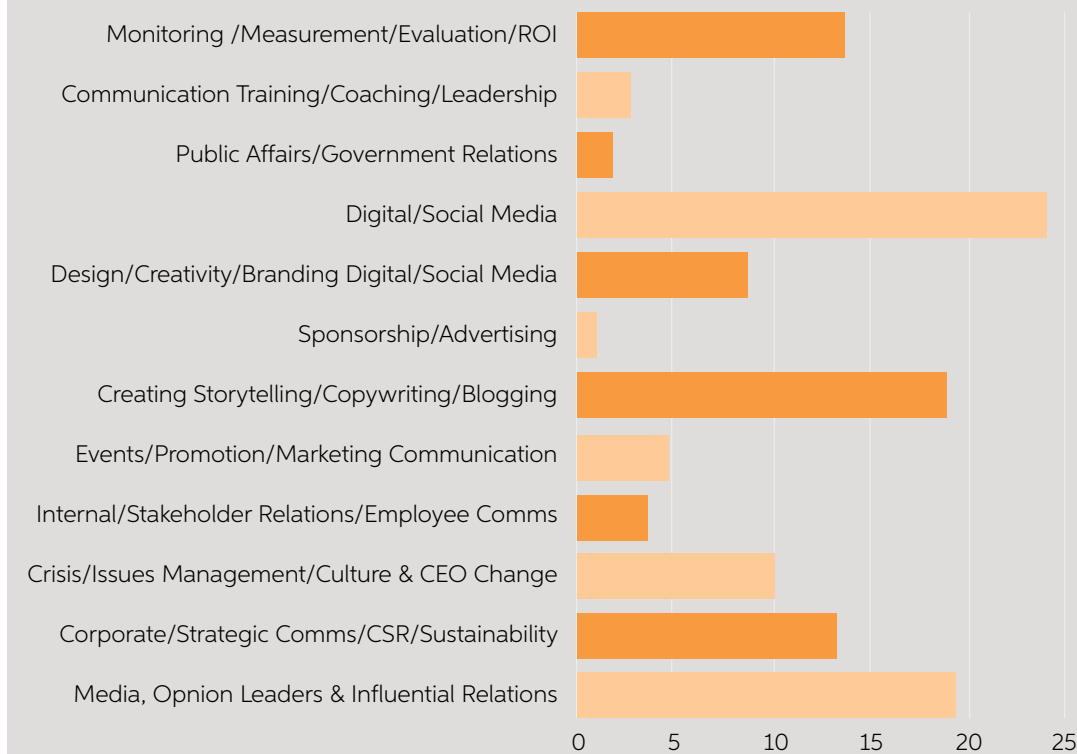
In order to implement an integrated PR strategy it is increasingly important to strengthen **digital and social media skills** and consequently 63% of the IPRN members plan to enhance these skills. Although the role of traditional PR is changing, the main skills such as Media, Opinion Leaders and Influential Relations remains important for the landscape of communication. 50% of IPRN members intend to increase these skills. 47% also recognise the importance of strengthening skills regarding content development and storytelling,

essential skills needed to fully integrate digital and social media activity.

 Reputation is key 
Anne Courtois, BPR, France

Mary Crotty from Mary Crotty PR, Ireland, said “we are upscaling our training and when recruiting we ensure new staff have digital skills” and Simone Guzzardi from L45, Italy said “we are hiring content creators as well as integrating with other creative agencies”.

skills to strengthen in the future



percentages are based on the number of responses received



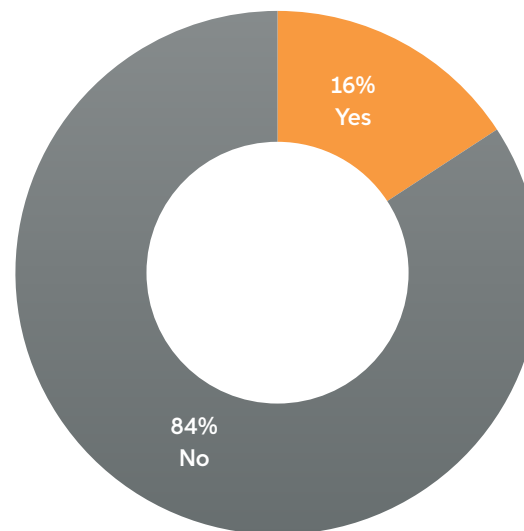
“I cannot see any impact in the near future. Perhaps within 15 years we will see more advanced analytics”

*Mikko Sillanpää, Harkonsalo & Vesa
Public Relations, Finland*

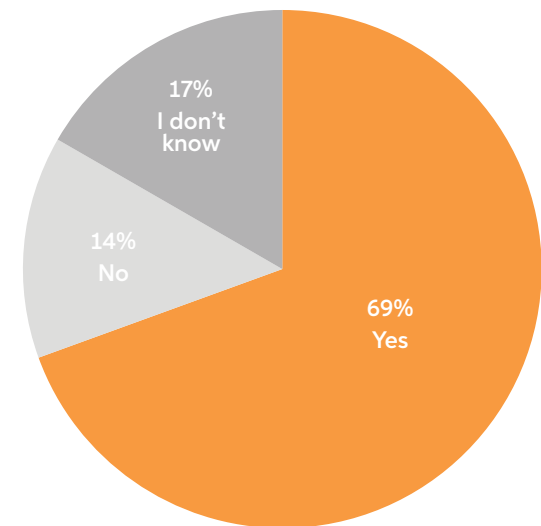
Artificial intelligence

As AI is a frequently discussed topic with PR professionals, the IPRN was keen to know more about the role it is playing or would play within agencies and the results reveal very different opinions across the membership. The pie chart shows that 69% of the IPRN agencies think that AI will have a significant impact on PR. Simone Esamie, Write Away Communication, Australia said: “Of course it will impact everything we do, how we research and purchase products, particularly with the impact of voice controlled devices such as Google Home. PR needs to consider how this will impact messaging (copywriting, SEO etc).” However there are a few members (14%) who think that AI won’t have an impact in the near future. Mikko Sillanpää, Harkonsalo & Vesa Public Relations, Finland said: “I cannot see any impact in the near future. Perhaps within 15 years we will see more advanced analytics.” Surprisingly most of the agencies (84%) think that AI is more an opportunity than a threat or a risk, because it could provide more time for creativity and more information about the target audiences through Big Data.

do you think AI could be a risk or threat to PR?



do you think AI will impact PR



Key insights:

- Providing a digital service was one of the most important global trends in 2018 and likely to continue into 2019 and beyond
 - o **95%** of our agencies are providing a digital service
 - o **75%** of these agencies are managing the digital service with an internal digital team
- Integrating digital
 - o the visualisation of content e.g. infographics/visual content and video are just as important today as press releases
 - o Social media is playing the biggest role in the digital landscape
 - **95%** of the agencies are seeing social media as the biggest role for their clients in the future
 - **97%** provide social media management and **92%** provide social media strategy
 - globally social media channels for B2C clients are the same
 - for B2B clients the preferred social media channel is different country to country
 - B2C agencies are using influencers more than B2B agencies - but it should be noted that use of influencers is an increasing trend across both B2C & B2B agencies

95% of the agencies surveyed are providing a digital service

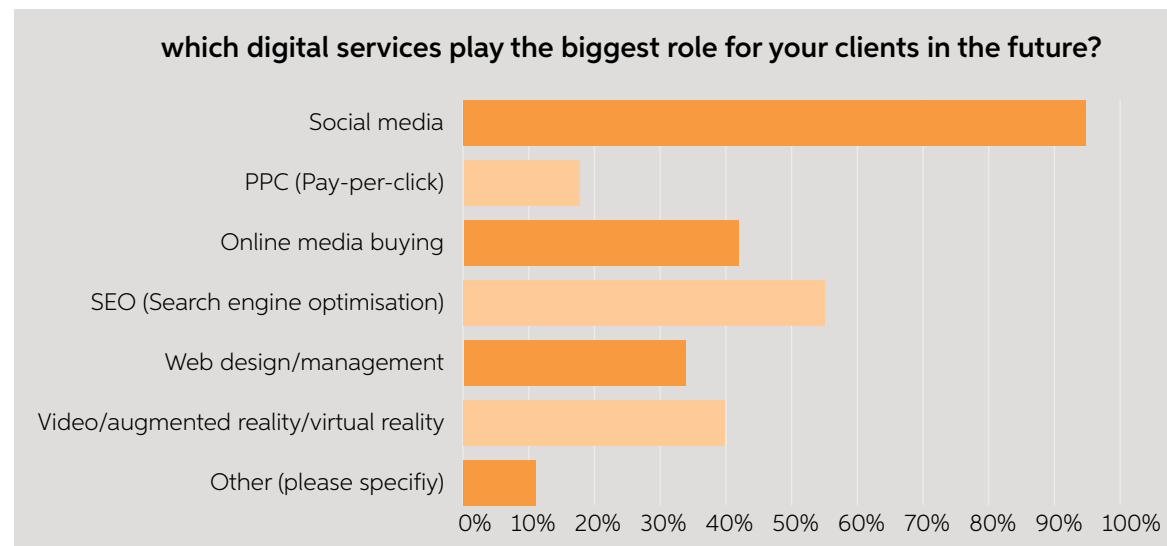
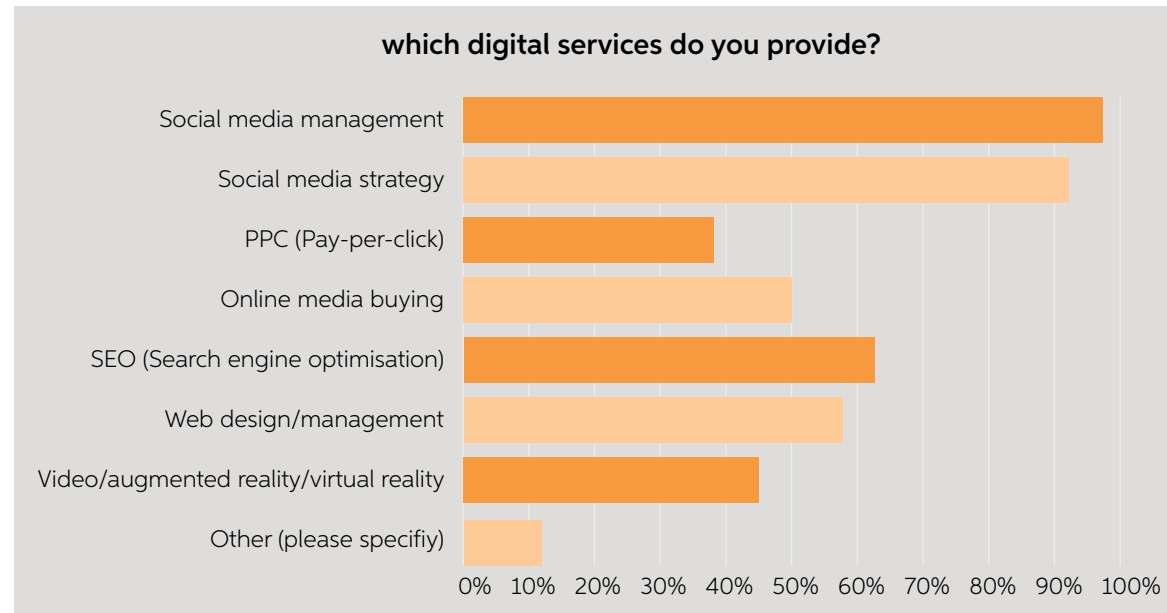
Digital services

To keep pace with digitalisation, 95% of IPRN agencies are providing a digital service. One significant trend is that the digital service is managed by an internal digital team; there are only a few agencies who are outsourcing the requirement to a digital agency or who are getting support from a Digital Consultant.



In order to get a deeper insight into the types of digital services that are being integrated, the IPRN asked its members which digital services they provide and which play the biggest role for their clients in the future. Of all digital services, the bar chart shows that 97% of the agencies provide social media management and 92% social media strategy above anything else.

When asked which digital services will play the biggest role for clients in the future, 95% of the agencies surveyed said social media. Unsurprisingly, the bar charts also show that SEO plays an important role now and for the future too. According to Claude Sauber, Binsfeld, Luxembourg, “handling digitalisation, defining key messages and avoiding over communication” is one of the biggest changes the PR industry will see over the next five years.



percentages are based on the number of responses received

PR tactics

With this changing landscape of communication the IPRN wanted to check whether the tactics used to deliver communication have changed and which are considered the most important now.

68% of the IPRN agencies surveyed see infographics, visual content and video as the most important PR tactics. The increasing use of video content is demonstrated by the fact that 87% of the IPRN members are using video content in their PR Strategy. This strategy includes almost all types of video content from brand films to product promotion videos. Although the use of video content can be seen as an international trend, some technologies are more popular in some countries more than others.

However, surprisingly the press release still appears to be important too, despite a general view that the 'press release is dead'. Case studies, white papers, and blogs continue to rate highly and this is where meaningful and valuable content is essential. The increase in digital communication coupled with the amount and speed of news available today is totally reliant on content. "PR agencies are acknowledged as the content generators" said Sarah McOnie, McOnie, UK. "We have to own this expert skill and use the content we generate to

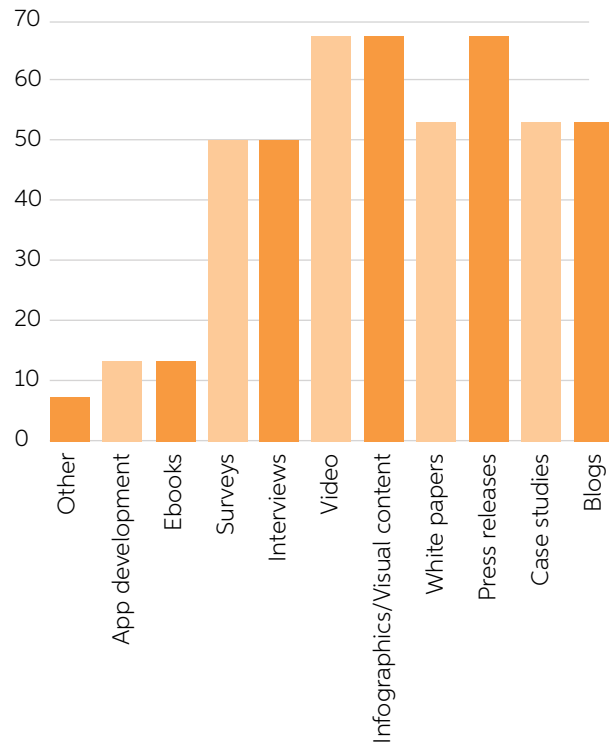
Content will be king but it will be disposable and there will be a greater need to personalise messaging

Peter Haddock, Edson Evers, UK

percentages are based on the number of responses received



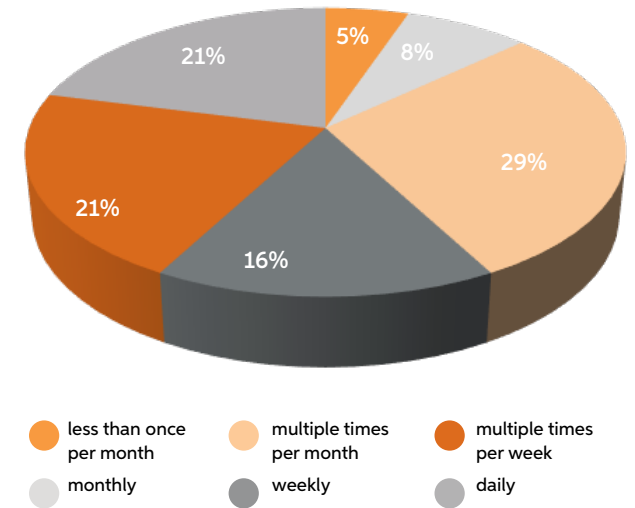
most important PR tactics



populate the differing platforms of communication. This is why it is vital PR agencies align integrated communication strategies with the digital world and use the content they generate to populate the different channels, repurposing where needed."

The global trend to create more content of a high quality is being implemented by all IPRN members, but the frequency content is published differs between the agencies with 29% publishing new content multiple times each month.

how often do you publish new content on behalf of your clients



Which social media channel?

Worldwide there are a plethora of social media channels to choose from but which are the most popular or appropriate to reach different audiences and achieve different objectives? The survey asked each member to grade, in order of importance, which social media channels they would recommend to their clients and the results can be seen here, represented as heat maps.

how effective are each of the social media channels?

	Facebook	Instagram	YouTube	Twitter	Pinterest	Snapchat	LinkedIn	Forums	TikTok	Google+	Twitch
B2B	9	7	8	10	5	0	11	6	0	4	0
B2C	11	11	9	8	7	6	5	4	3	2	1

what do your clients use each of the social platforms for?

	brand building		part of an integrated mix		business profiling		reputation management		personal profiling		recruitment		connecting/identifying customer		monitoring the competition		product news		improve clients SEO/site index	
	B2B	B2C	B2B	B2C	B2B	B2C	B2B	B2C	B2B	B2C	B2B	B2C	B2B	B2C	B2B	B2C	B2B	B2C	B2B	B2C
LinkedIn	59%	55%	44%	45%	49%	41%	51%	31%	56%	41%	79%	31%	36%	31%	26%	17%	26%	21%	18%	28%
Twitter	49%	46%	54%	54%	23%	14%	26%	32%	20%	0%	9%	11%	20%	18%	34%	11%	29%	46%	6%	4%
Facebook	54%	66%	71%	69%	17%	24%	31%	38%	17%	17%	20%	17%	37%	45%	29%	24%	51%	38%	23%	14%
YouTube	62%	59%	69%	70%	28%	11%	14%	4%	3%	0%	7%	7%	10%	22%	10%	11%	28%	37%	14%	11%
Instagram	66%	76%	56%	66%	19%	34%	28%	24%	25%	14%	9%	10%	28%	38%	25%	7%	41%	41%	6%	14%
Google+	40%	57%	40%	36%	7%	29%	13%	14%	0%	7%	0%	7%	7%	21%	20%	14%	20%	21%	53%	36%
Snapchat	0%	43%		43%		7%		7%		0%		7%		21%		0%		14%		7%
TikTok		14%		43%		14%		14%		0%		0%		0%		0%		0%		29%
Pinterest	22%	65%	50%	53%	6%	12%	6%	6%	0%	0%	0%	6%	11%	41%	0%	12%	6%	35%	11%	6%
Twitch		13%		50%		13%		0%		0%		0%		13%		0%		13%		13%
Forums	45%	37%	55%	47%	15%	16%	30%	26%	10%	11%	15%	11%	15%	42%	30%	37%	20%	16%	15%	11%



percentages are based on the number of responses received





Key insights:

- Digital media is increasing because it is immediate and easier to monetise
- **74%** of the respondents have noticed a decline in earned print coverage vs. earned digital coverage
- on average **51%** of publications are only available online

There is combined opinion across the IPRN that traditional media (print publications) is declining. Priyanka Uppal, Purple Media Works, India stated that “in India traditional media is losing its steam”; Ben Brugler, Akhia Communications, USA said “media outlets and how people find information are changing” and Sonia Quesada from High Results in Colombia stated that “traditional media continues to decline.” Of course the impact of the digital and social world plays a large part of this change, together with the costs to produce printed material and the environmental impact.

Another consideration is the increasing need for media platforms to generate income, so it's the sales team that has greatest influence over editorial content. Anishkaa Samit Gehani from Yardstick Marketing in the Middle East explained “sales are driving a lot of the editorial in the UAE and have been for the past few years. Previously a reporter would value and give due credit to a good story; increasingly we witness a powerless reporter as decisions to publish news are majorly dictated by the sales team.”

Media is transforming from
paper to online formats
Ana Maria Matulic, Headline, Chile

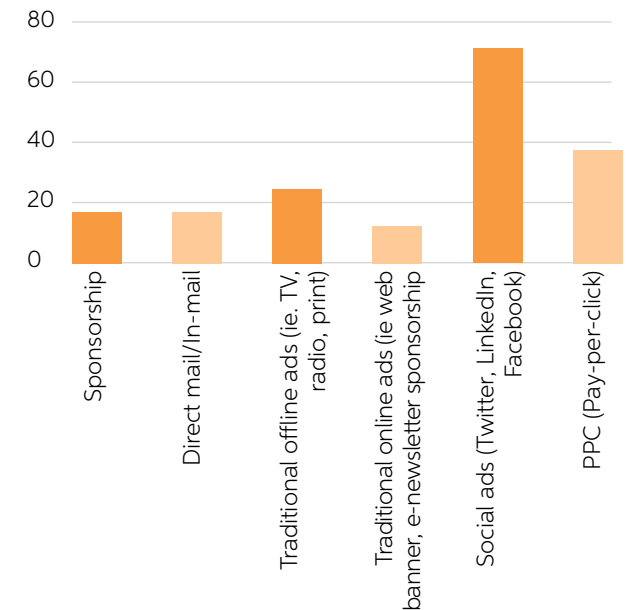
Contact with editors

Keeping in touch with editors still remains important for PR agencies and it is not surprising that contact via email is more popular. 76% maintain regular contact with industry editors through e-mail, 63% keep in contact through regular telephone calls, whereby only 50% of members now keep in contact with industry editors through face to face meetings. Generally editorial teams have diminished in numbers and editors are expected to produce content for multiple channels. They simply don't have the time to leave their desks. However a strong relationship with editors is still important to ensure they are fully informed of clients' activities and it has already been identified in the survey that building strong relationships is important. Karsten Hoppe, TDUB Kommunikationsberatung, Germany explained that "concentrating on a good network of the most important 'gatekeepers' (editors, bloggers, influencers) was critical to gaining good coverage for your clients."

Paid media

The digital revolution is also impacting the effectiveness of the paid media channels. The survey asked participants for the most effective paid advertising methods. The bar chart shows that the most effective paid advertising comes from social ads on channels such as Twitter, LinkedIn, Facebook, etc. As a consequence of this, traditional paid media advertising has declined, because the survey shows that nowadays only 24% of IPRN members value traditional offline advertising and only 16% value traditional online ads as the most effective paid advertising method.

the most effective paid advertising methods



Media outlets and
how people find
information are
changing

*Ben Brugler, Akhia
Communications, USA*



 We've built an analytics tool to help our clients better understand their audiences. This helps cut through the clutter and ensure targeting 

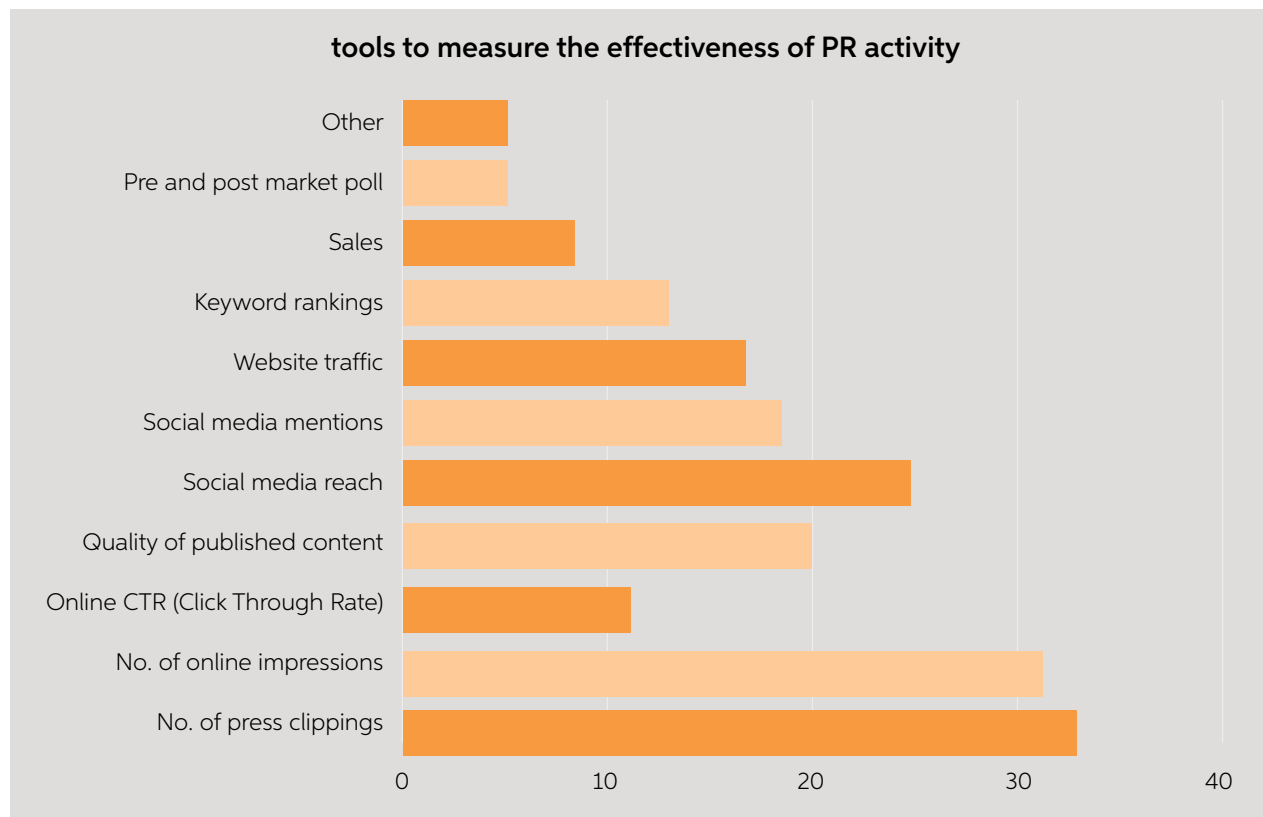
Carrie Jones, JPA Health Communications, USA

Key insights

- **89%** of agencies stated that clients are interested in **the measurement of the impact of PR**
- these days the number of online clippings are as effective to measure ROI as the number of offline clippings
- only **8%** are aware of the challenge of **tracking dark social**

As a network of agencies the IPRN is seeing a significant change in the measurement of success. The requirement to measure the Return on Investment (ROI) has increased. In fact 89% of agencies notice that clients are interested in the measurement of the impact of PR and as Claude Sauber, Binsfeld, Luxembourg says “permanent monitoring and evaluation” helps overcome the challenges of the changing landscape of PR. There are several tools to measure the effectiveness of PR activity. But in general, it seems that we are still using the same tools because 89% are measuring the effectiveness of PR through the number of press clippings. As the agencies are including digital strategies in their PR activities, tools such as the reach of online and social media are accurate and effective methods to measure the impact of PR. As digital communication make it easier to measure the effectiveness of PR, integrated strategies are becoming more and more attractive to the agencies’ clients. Alberte Santos Ledo, Evercom, Spain explained “the new channels of digital communication help demonstrate how PR creates value for businesses.”

Although 86% of the IPRN client’s are expecting that PR activities have a more direct impact on sales, only eight agencies, including USA, UK, South Africa, Russia and Finland, are measuring the success of PR activity through sales. Moreover, the results show that some of the agencies are truly innovative by creating their own software programme to support measurement as Carrie Jones, JPA Health Communications, USA explained “we’ve built an analytics tool to help our clients better understand their audiences. This helps cut through the clutter and ensure targeting.”



Dark social

Dark social is a term used to refer to the social sharing of content that occurs outside of what can be measured by any online analytics programs. This mostly occurs when a link is sent via online chat or email, rather than shared over a social media platform, from which referrals can be measured. The prevalence of sharing through dark social suggests that social media communication and marketing, that fails to focus on the type and quality of content, may be overlooking a huge portion of social sharing, ultimately having a big impact on the accuracy of measurement.

Surprisingly only 8% of the IPRN agencies surveyed see tracking Dark Social as a challenge for the future. This is even more surprising considering that more than two-thirds (78%¹) of all website shares are Dark Social shares that happen through private channels. However 17% of the IPRN members are tracking dark social and of those 33% track it with Google Analytics (GA). Other tracking methods mentioned included Business Manager, Brandwatch and Ads Manager for Facebook.

¹<https://blog.getsocial.io/dark-social-2018-getsocial-research-report/#gs.B0qjoag>



In my opinion, one the of strategies that we use to overcome the challenges of the changing landscape of communication is good old fashioned leg work and detective work – you have to find out what is working and what isn't

Ben Brugler, Akhia Communications, USA

Closing remark

One of the key insights is that the changes in the landscape of PR are the result of the new age of digitalisation. Social media and digital services have become important platforms in PR. Our study shows that the IPRN agencies are aware of the new challenges and are introducing new and adapting existing strategies to successfully integrate them.

95% of our agencies are providing a digital service

63% of the IPRN members are planning to strengthen their digital and social media skills and

87% of our IPRN members are using video content.

Although we are doing well in adapting to the digital media landscape, the survey shows that the IPRN agencies are not aware of all the challenges such as tracking Dark Social and using AI to enhance PR activities and potentially free up a PR team's time. Consequently one key message from the survey could therefore be to keep abreast of new challenges and to seize every opportunity to benefit from the ever changing landscape of communication.

Although traditional PR is changing due to digitalisation, the survey has shown that PR remains a major part of good communication. Ultimately, regardless of the changes, the role of PR hasn't changed - it is to manage, support and protect an organisation's reputation and build good relationships with that organisation's stakeholders. How that is done and which communication methods are used remain the responsibility of the PR agency.

Survey participants

Mary Crotty, Crotty Communications, Ireland
Philippe Beck, Oxygen & Partners, Luxembourg
Mikko Sillanpää, Harkonsalo&Vesa PR, Finland
Kieran Powell, Channel V Media, USA
Rodrigo Viana de Freitas, Central de Informação, Portugal
Inna Anisimova, PR Partner, Russia
Anishkaa Samit Gehani, Yardstick Marketing Management, Middle East
Anna Schwan, Schwan Communications, Germany
Isabell Reinecke, presigno, Germany
Paweł Bylicki, Public Dialog, Poland
Peter Richter, AutoCom Deutschland, Germany
Anna Lozinska, Crest Communications, Czech Republic
David Gribnau, Gribnau Communications, Netherlands
Peter Haddock, Edson Evers, UK
Milene Rijcken, JPKOM, Germany
Alberte Santos, Evercom, Spain
Nicole Capper, MANGO-OMC, South Africa
Nuray Güler, primo PR, Germany
Poul Kragelund, Kragelund Kommunikation, Denmark
Carrie Jones, JPA Health Communications, USA
Anuj Anand, Purple Media Works, India

Simone Guzzardi, L45, Italy
Diego Barcelo Perez, Comunion Iberoamericana, Spain
Ben Brugler, akhia communications, USA
Monique de Saint Malo, Stratego, Panama
Claude Sauber, binsfeld, Luxembourg
Karsten Hoppe, TDUB, Germany
Luis Gonzalez Canomanuel, Alana Consultores, Spain
Ana Maria Matulic, Headline, Chile
Liz D'Oliveira, Redwood Consulting, UK
Patricio Carvajal, Carvajal PR Team, Argentina
Priyanka Uppal, Purple Media Works, India
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Simone Esamie, Write Away Communication, Australia
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