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SECTOR OF PUBLIC RELATIONS AGENCIES IN POLAND: ITS STATE AND PERSPECTIVES AFTER THE COVID-19 PANDEMIC

RYNEK AGENCJI PUBLIC RELATIONS W POLSCE. STAN I PERSPEKTYWY PO PANDEMII COVID-19

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ABSTRACT

The article is based on the results of research on the sector of public relation (PR) agencies in Poland, which is an important part of the entire PR industry. The purpose of this article is to determine the potential of this sector in the post-pandemic period in the light of research results. The analysis focused on key parameters that influence the condition of the PR agencies sector, such as the number of agencies, type of activity, legal form, territorial distribution and financial indicators. Desk research (qualitative methodology) was used as the main research technique. The research was conducted on the basis of available databases and own datasets, such as lists of PR agencies, data from the Central Statistical Office (GUS), records stored in the Bisnode database, data from PR agencies' websites and others. At a further stage, quantitative analysis of the collected statistical data was applied. The article illustrates the role of PR agencies in terms of the entire PR industry and presents a scheme for building a sampling frame on this type of companies.

Key words:media, research, public relations, public relation agencies, PR specialist, crisis management

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ABSTRAKT

Artykuł oparty został na wynikach badań ryku agencji public relations w Polsce. Ich celem była dogłębna analiza wskazanego sektora włącznie z określeniem jego potencjału według kluczowych parametrów, takich jak między innymi: liczba agencji, rodzaj prowadzonej działalności, forma prawna, rozmieszczenie terytorialne, wskaźniki finansowe. Jako główną technikę badawczą zastosowano desk research, prowadzony na bazie dostępnych operatów i zbiorów danych własnych, takich jak: zestawienia agencji PR, dane Głównego Urzędu Statystycznego, rekordy zapisane w bazie Bisnode, dane ze stron www agencji PR, i inne. Na dalszym etapie występuje analiza ilościowa zgromadzonych danych statystycznych. Artykuł obrazuje rolę agencji PR w ujęciu całej branży public relations.

Słowa kluczowe: media, badania, public relations, agencje public relations, crisis management

JEL: A12, C18,, D4, H12, J11, L84

Introduction

Public relation (PR) agencies1 are professional entities that provide consulting services, support clients and help them influence the opinions, attitudes and behaviours of the addressees of these activities. This entails taking responsibility for one's actions towards customers, employees, the profession and society as a whole (Barlik, Hope, Olędzki & Wojcik, 2020). The tasks that are most often commissioned to PR agencies include the analysis of the initial state of the studied entity's image, a critical assessment of its communication strategy, the control of conducted PR activities and, finally, the strengthening of these activities (Wojcik, 2005). Besides, agencies often take over some of the tasks that are within the scope of interest of economic entities, but which cannot be carried out due to, for example, limited human resources. They are able to flexibly respond to the market changes and to take immediate reactions, which is particularly important in the context of anti-crisis measures. For many companies, they are a beneficial form of support for ongoing activities. Particularly in the context of human resources, which, in case you hire your own team, make it necessary to manage the entire process, from hiring to leaves, working hours, etc. In the case of hiring a PR agency, the problems indicated above are basically non-existent, and the company is held accountable for the tasks it performs. Hence, the arguments above can influence the intense beneficial changes in the PR market, especially in the context of the agency sector. It is obvious, however, that although there are benefits in hiring a PR agency, there are also problems, such as the inability to access significant, confidential data that companies possess and thus limited knowledge of the topics that are then needed to be discussed and advised to clients. However, despite the significant drawbacks, the benefits arising from cooperation between the identified groups of entities seem to outweigh the problems.

PR agencies offer two categories of services. First, there are less complicated, even technical tasks, dedicated to achieving goals of mainly operational nature, such as digital PR, media relations, organisation of press conferences, briefings and other events, as well as production of information materials. Secondly, there are highly specialised services, i.e. services that require very broad knowledge, experience and adequate qualifications from employees. In this case, we are talking, for example, about services related to crisis preparation and management, research and broadly understood analytics, as well as investor relations. Research using cluster analysis indicates that an agency's service offering may be based on, among other things, digital or crisis specialisation (where strategic consulting plays a key role) (Szuba, 2022). Especially in the latter case, PR agencies are required to have knowledge resources and staff that can meet requirements that not only are specific but, above all, are based on multidisciplinary knowledge in areas, such as, for example, economics, psychology, finance, marketing or management.

PR agencies are entities that are based on two key values: trust and ethics. In both cases, we are talking about the specific DNA of a PR agency. Only when they occur simultaneously can we talk about building the expected relationships. Trust and ethics are strongly correlated.

Trust, truth and transparency are in fact fundamental values in PR activities (Hope, 2013). Without trust, it is unlikely that one will have a positive opinion of the entity and a good relationship with it. Neither is trust possible without credibility (Wojcik, 2005). Ethics itself, on the other hand, is the quintessence of the activities undertaken by PR agencies, their foundation. However, some of them seem to ignore the value that comes from taking action based on ethical behaviour, which has been confirmed by research in the industry conducted over the years (Raport, 2020). Ultimately, lack of ethics, or being too loose on the subject, amplifies the risks and causes crises (Tworzydło, 2020). The consequence is image perturbation and even total reputation discredit. Crises can disrupt or destroy reputation and therefore require actions related to professional guidance through these events (Kończak & Bylicki, 2018).

The issues considered in the article concern the PR agency sector, which is clearly changing or, more precisely, professionalising. Although it is still noticeable that young, inexperienced people, seeing their chance in PR , enter the industry, the relationship between the agency and the client is based more and more on the experience of the people. It also results from the cycle of life and development of the industry, as >3 decades have passed since the first PR agency in Poland was established[2] and a statistical agency can boast a 10-year history of functioning on the Polish PR market (as of 2022).

In times of crises that have affected the global economy, caused firstly by coronavirus disease-2019 (COVID-19) and secondly as a consequence of the war initiated by Russia in Ukraine, cost-cutting is and will be noticeable. Times of crises always cause companies to undertake changes in their operations, including cost optimisation. Looking for savings in difficult times, companies reduce expenses particularly on communication with the environment — promotion and PR (Żbikowska, 2009). Reduction strategies are therefore a component that has become a permanent feature of the service provided to clients who seek support from PR agencies. Consequently, cost reduction is a constantly increasing challenge that is faced by agency managers (Tworzydło, Szuba & Życzyński, 2020).

Methodology of the Study

The PR agencies sector in Poland is a special research area, as it has not been fully examined so far. So far, there have been no research projects that provide even a rough picture of the sector more broadly than a presentation of the performance of the largest players in the market. There was no attempt to holistically look at the industry through the perspective of just agencies. Even in previous years, any action in this area was limited to labour market issues or presentation of numbers without real, accurate research supported by correct methodology (Żbikowska, 2009). It was not until a team led by the authors of this publication undertook deep analyses and calculations that ultimately it became possible to describe the market and identify the variables that particularly differentiate it.[3] The research conducted from 2020 to 2021 has not only determined the size of the market but also indicated the directions of change that can realistically occur. PR agencies are a specific category of entities that significantly stand out on the PR market, not only in Poland. It is a fundamental part of the communication-advisory ecosystem (Tworzydło, Szuba & Życzyński, 2019). Setting up such an entity is not too complicated. It can be considered that the entry threshold in terms of knowledge and financial resources causes a number of people to set up entities, calling them PR agencies. It is only when they collide with economic reality that some of these entities are shut down (especially sole proprietorships).

The key purpose of the study was to evaluate the market of PR agencies in Poland, including the determination of its potential according to key parameters. such as the number of entities, the type of activity, the legal form, the territorial distribution and the financial indicators. The research was conducted using desk research[4] based on available operators and own datasets, such as lists of PR agencies (e.g. Association of Public Relations Agencies, the Polish Public Relations Consultancies Association, PRoto, Newsline, publicrelations.pl), industry reports, data from the Central Statistical Office, data commercially shared by entities specialising in providing business information in a digital form (e.g. Bisnode), financial statements available in the financial documents viewer (https://ekrs.ms.gov.pl), data from PR agencies' websites, own data of the Exacto research and strategic analysis team. Desk research as research conducted 'from behind the desk' is based on reviewing and verifying secondary data, which classifies the technique within non-reactive research (Makowska, 2013). Babbie (2004) points out that its use has a number of benefits, including that long-term processes can be analysed and there is no influence of the researcher on the object of study.

An important part of the whole process was the compilation of sources, their peer review and processing. Based on the above, a categorisation key dedicated to the agency database was developed, which allowed to systematise knowledge about the PR agencies market in Poland. The study had a population-based character among all PR agencies in Poland, and one of its results was the creation of the first-in-the-country complete list of such entities on the basis of the developed definition criteria. Among the selected research problems posed at the stage of conceptualisation and development of research methodology were the following:

- to determine the approximate number of PR agencies operating in Poland
- analysis of the intensity of occurrence of PR service providers in specific regions
- evaluation of the correctness of the entity's identification as an agency in the context of the attributes assigned to itself, e.g. Polish Classification of Activities (Polish: Polska Klasyfikacja Działalności or PKD) number 70.21Z (interpersonal relations, PR and communications)
- defining the scope of tasks undertaken by PR agencies located in Poland, e.g. leading task specialisation
- analysis of PR agencies' names in terms of frequency of key phrases appearing, i.e. communication, PR, public relations
- developing Poland's first sampling frame of PR agencies, which includes the most up-to-date data on the agencies market based on established criteria for the PR agencies segment
- evaluation of PR agencies' potential in selected areas related to their functioning, e.g. in the context of their membership in industry organisations or the value of their share capital
- comparison of available Central Statistical Office (CSO) (Polish: GUS) data within the entities assigned to PKD 70.21Z with the developed sampling frame (only PR agencies).

The method applied in the study allowed the development of a sampling frame, based on which statistical calculations and further data mining were conducted. Analysis of records of available data sources on PR agencies in Poland was performed. The purpose of the analysis was, among others, to determine the exact number of PR agencies, to check what is the dominant type of their activity, their history, legal form, territorial distribution and the way they present their service offer to trace the financial indicators of PR companies and to determine what percentage of agencies directly position themselves as companies based on PR services. The collected data also include an extensive package of contact indicators, allowing quick communication with particular agencies. Collecting the agency database itself was a long-term process, divided into several stages, as follows:

- collecting and aggregating available market data from companies that provide services directly related to PR activities or declare such task specialisation (mainly by PKD codes);
- verifying the logical consistency and completeness of the data and verifying that the data are up to date. In cases where it could not be determined in any way whether the companies were actually operating in the market were rejected at this stage. This is why companies without any contact details, such as phone number, website, e-mail, entry in the National Court Register, no mention on the Internet about their functioning or representation by specific PR specialists (mainly leaders), were removed from the database.
- assigning agencies to achieved 2019 financial indicators from reports (e.g. assets, earnings, revenues, current liquidity, equity, earnings before interest, taxes, depreciation and amortisation (EBITDA) or return on capital).

Based on the three steps above, 934 companies were selected, which can be analysed in different configurations, such as selecting agencies that have websites and further reviewing how they communicate with the public.

Sampling Frame

A PR agency is described by several key parameters. First of all, it should be noted that these entities conduct activities classified as task-related PR, assuming that this is the main area of the entities' activity. Second, a PR agency operates within an organised structure that allows it to conduct projects of different levels of complexity while using a range of techniques and tools in response to clients' communication needs. Finally, a PR agency is an entity that employs permanent staff and conducts advisory and expert activities in image and relationship building at the management level and operational activities at lower levels of corporate management (Tworzydło, Szuba & Życzyński, 2019, p. 9-10). Staff size is also an important factor, as it is unreasonable to consider a strictly one-person operation as a PR agency.

For the purposes of the research used in this publication, this definition was expanded to include practical, measurable and easily assessed elements. Due to the fact that a modern PR agency must be present in the virtual space, it was decided that having a website where it is possible to verify the profile of the entity's activity, e.g. on the basis of an offer of services, realisations and experts, is indispensable. It was concluded that the element that allows to include a given entity in the database forming the research frame is the possession of the PKD 70.21.Z entry or the prefix in the name of the company indicating PR, e.g. communication (communication)/PR/public relations. Another helpful element in defining the type of entity is information concerning the agency's leader (one can check its professional status), membership in international PR network groups or the duration of its operation on the market. It was assumed that all companies that function within the framework of industry organisations such as the Association of Public Relations Agencies or the Polish Public Relations Consultancies Association are considered PR agencies, as they are a kind of 'top players' of the whole industry. For the preliminary analysis, we also used analytical documents such as the 2019 financial statements.

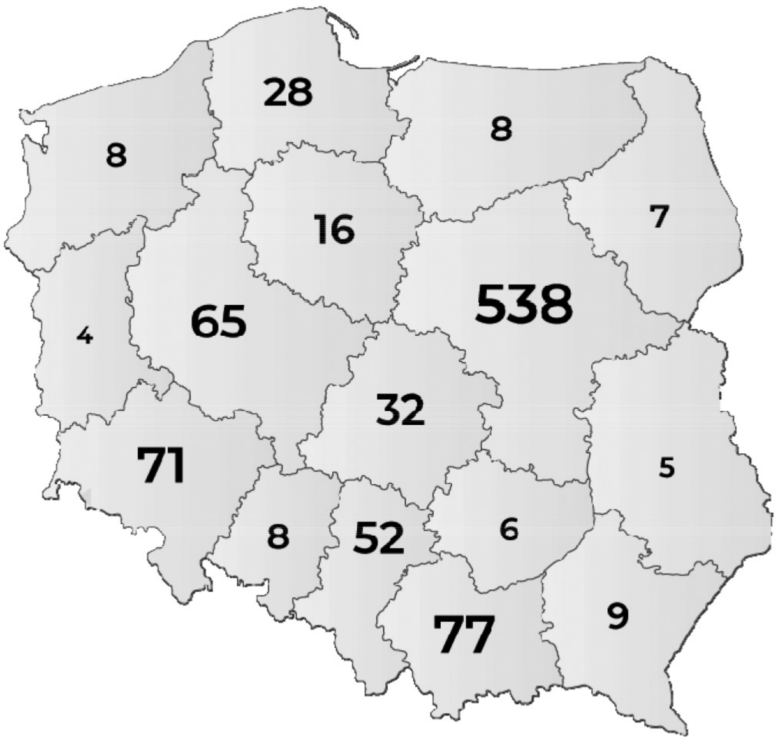
There is no universal methodology to determine whether a company can be considered a PR agency. With this in mind, a case-by-case verification approach was required in the analysis. The PR sector is dispersed in terms of the quality of its services, and thus its constituent entities have different business profiles. For the authors of the study, the key sources of information were websites, social media profiles and available data from industry organisations, as well as experience gained from many years of research on the agencies sector in Poland. Based on this, it is possible to verify whether we are dealing with a PR agency and what are the specialisations of this entity. Furthermore, other sources were taken into account, including data generated by the companies themselves and made available to the public, i.e. type of business activity in terms of PKD and company name.

PR Agencies — Initial Situation in Numbers

On the basis of the conducted research, it was shown that 934 companies in Poland (as of 2021) can be called PR agencies. More than half of them are from Masovia, and almost every fourth is a one-person company (in terms of legal form). In the authors' opinion, 212 entities (23% of the total) can be called an experienced agency, as they meet all the criteria adopted by the researchers as differentiating elements. These included an active website, positioning of the company as a PR agency, the PKD number 70.21.Z, meaning interpersonal relations (PR and communications), positioning and visibility of the agency's leader on the web and a duration of no less than 5 years of active operation on the market (Figure 1).

The research shows that >58% of the entities defined as PR agencies operate in Mazowsze (region of Poland) and that is where the centre of advisory and communication services is located, which results, for example, from the number of large companies and corporations. Quite a large group of entities providing specialised communication consulting services is also located in the Małopolska (77), Dolnośląskie (71) and Wielkopolska (65) regions of Poland. The smallest number of PR agencies is located in Lubelskie (5) and Lubuskie (4) (regions of Poland).

Figure 1. Territorial distribution of public relations agencies in Poland



Source: Own elaboration based on research

The research found that there are 934 PR agencies on the Polish market. The vast majority of them are limited liability companies (62%). On average, every fourth agency operates as a sole proprietorship, and the remaining 13% of entities establish other forms of partnerships (e.g. civil, general and, the most numerous in this group, limited partnerships). It is worth mentioning that 69% of the agencies in the sampling frame have a company website (Table 1).

The statistical agency from the survey frame has been operating in the market for nearly 10 years (average: 9.8 years). However, as many as 200 entities have been in the industry for <5 years. Only 7% of agencies are affiliated with one of the industry organisations such as the Association of Public Relations Agencies (SAPR) or the Polish Public Relations Consultancies Association (ZFPR). This may result from a lack of need for involvement, a lack of desire to engage in social activities or a lack of familiarity with the activities undertaken by the mentioned associations of entities that form the PR industry. The criteria for becoming a member of Polish associations (SAPR or ZFPR) are also gaining in importance (Table 2).

Table 1. Legal form of a public relations agency

Legal form	Frequency (%)
Limited liability companies	582 (62.31)
Sole proprietorship	230 (24.63)
Limited partnerships	62 (6.64)
Other forms of partnerships	60 (6.42)

Source: Own elaboration based on research.

Table 2. Duration of operation in the public relations industry by PR agencies

Duration of operation in the PR industry (years)	Frequency (%)
<5	200 (21.41)
5-9	309 (33.08)
10-19	363 (38.87)
≥20	62 (6.64)

Source: Own elaboration based on research.

On the basis of the conducted analysis, it was found out that 85% of all the agencies have the number 70.21.Z entered within their PKD codes, meaning interpersonal relations (PR) and communication. However, 'only' 532 companies (57%) indicate this code as the main PKD. The research confirmed the scale of the problem faced by Polish PR, namely the lack of a clear distinction between a factual PR agency and entities providing various quality services qualified as PR activities. This is indicated by the difference between the two previously discussed rates (and we are talking about almost 28 percentage points). It is also noteworthy that only one-third of the agencies send a message via their website that they are a PR agency (in 32.9% of cases, the phrase 'we are a PR agency' etc. appears) (Table 3).

Table 3. PKD codes assigned to the studied public relations agencies

Type of main PKD	Scope	Frequency (%)
70.21.Z	Interpersonal relations (public relations and communications)	532 (56.96)
73.11.Z	Advertising agency activities	140 (14.99)
Not assigned	Lack of main PKD	117 (12.53)
70.22.Z	Other business and management consultations	36 (3.85)
82.30.Z	Activities related to organisation of trade fairs, exhibitions and congresses	17 (1.82)
62.01.Z	Software-related activities	11 (1.18)
73.20.Z	Market and opinion surveys	5 (0.54)
Other indications	A total of 49 other main PKD codes	76 (8.14)

PKD, Polish Classification of Activities.
Source: own elaboration based on research.

The optionality in defining activity codes is also a problem. On average, one in eight agencies does not provide this information. Another challenge is the influence of competing disciplines and their intermingling. This is evidenced by the fact that as many as 15% of agencies — defined by the researchers as PR agencies — position themselves more as an advertising agency (code: 73.11.Z). The surveyed entities less frequently emphasise the connection with the event-and-technology industry.

Based on the analysis of available financial reports for 2019, we can determine the potential and dynamics of changes occurring in the agency market. An in-depth analysis of financial data from nearly 400 PR agencies revealed, among other things, the following:

- Actual net revenue from the services of the indicated 400 agencies (which report their financial data) in the pre-COVID year (2019) amounted to nearly 846 million net.
- The profit generated by these agencies was 54 million, with one in three companies (on average) reporting a loss for 2019 (120 out of 386 companies).
- The total value of equity capital of all PR agencies (for which financial data were available) amounted to PLN 188 million, and their estimated market value ranged from PLN 400-500 million.

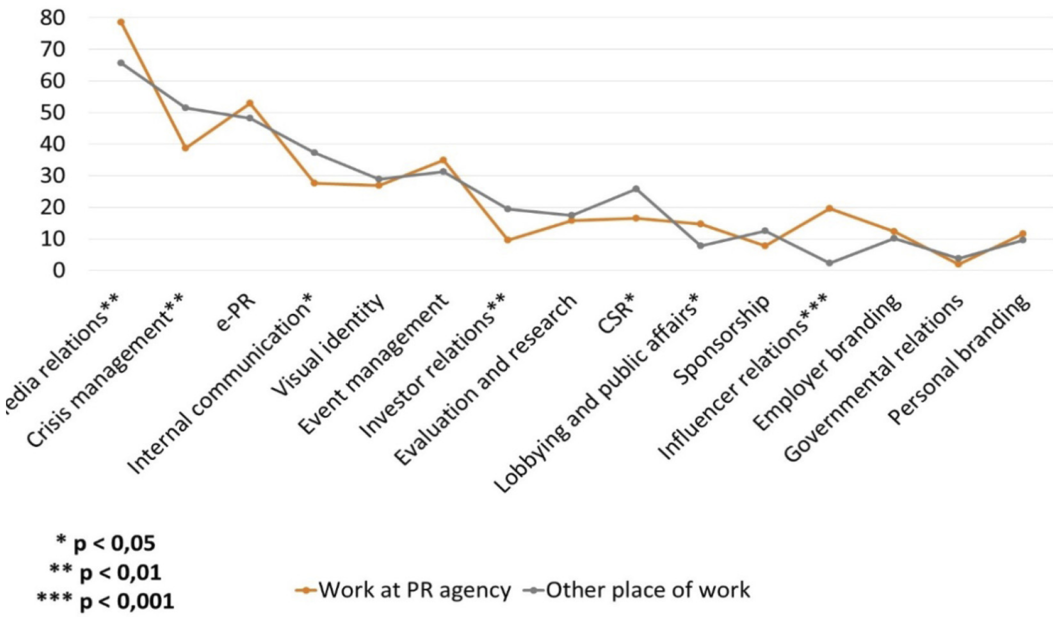
Subsequently, we used the obtained data and, based on statistical methods, we were able to estimate the values of financial ratios of the entire PR agencies sector in 2019. The strategic purpose of the research project was to develop Poland's first PR agency sampling frame, which would include the most up-to-date data regarding their characteristics and market condition. Besides this, the net revenue from the services sale for 2019 was also estimated. Calculations were based on actual data obtained for 384 agencies, which in their reports declared a total revenue of PLN 846 million. For the remaining 550 agencies, which either do not have a National Court Register (*Krajowy Rejestr Sądowy* or KRS) number or their financial statements are not available for inspection, we used estimation based on the median value of revenue (calculated on the basis of financial data of entities reporting their revenue — the median amounted to PLN 503,000). Then, the median value was multiplied by the number of 'non-reporting' agencies and summed with the data extracted from the financial reports. The estimate equals PLN[1] billion 123 million. This is the approximate value of the PR market in Poland in 2019. This is mainly due to the fact that 2020 (the year in which the study was conducted) was a pandemic (COVID-19) year and agencies did not post up-to-date financial reports in time or they were 'impaired' by the global crisis. Estimated net profit of the surveyed agencies amounted to PLN 63 million, while the estimated market value of PR agencies in Poland counted as total assets amounted in the examined year to PLN 563 million.

In this research, it was assumed that the company website is the communication showcase of the agency. In this context, it is worth noting that more than two-thirds of the surveyed entities have their own website (69%), while its correct operation was found in 59% of cases. The difference is due to the fact that at some of the companies, the website was not working or was under reconstruction. An analysis of the websites' content showed that the vast majority of companies present their services in detail. On the websites, there is a description of each activity along with a portfolio presentation and a list and visualisation of completed projects. Less often do agencies choose to introduce their staff (if they do, there is a bio of the leader/key experts on the site). The communication portrait of PR agencies should be complemented with the information that 28% of the surveyed entities maintain an official profile on LinkedIn and 32.8% on Facebook. In the meantime, 202 agencies have each of the discussed communication channels (their own website and company accounts — LinkedIn and Facebook).

Prospects for Change in the Market of PR Agencies

At this point, it is worth noting the specific nature of work in PR agencies. Data in this area are provided by other research projects conducted by the authors of this article. The research shows that professionals working in PR agencies significantly more often carry out tasks related to media relations (79% versus 66%), lobbying and public affairs (15% versus 8%) and cooperate with influencers (20% versus 2%)[5] . Specialists working in PR outside the agency activities declared a stronger focus on crisis management, internal communications, investor relations and corporate social responsibility (CSR) (Tworzydło, Szuba & Życzyński, 2020) (Figure 2).

Figure 2. Professional duties of public relations specialists — areas of activity (in %)



Source: Tworzydło, D., Szuba, P., & Życzyński, N. (2020).

Research conducted by a team led by the authors of the publication showed that COVID-19 caused a number of changes not only in the PR market but also in the area of the range of services offered to clients. First, it is important to note that there has been a smooth shift towards remote working. Many companies and their employees have realised that it is possible to get work done and there is no need for employees and managers to be physically present at the company headquarters or branches. The shift, initially planned as temporary, turned out to be a permanent change that has affected PR firms. It is amplified and commonly used even today. Another lasting change that has taken place in the analysed industry is the shift of focus to highly specialised services, such as crisis management or internal communications (see Table 4). In the first case, the situation is reasonable since COVID-19 caused a series of micro-crises and — events that permanently and heavily burdened the image of some entities. Crises, therefore, are becoming an increasingly desirable speciality, as more and more projects for clients include such activities. In a significant portion of the solicitations, crisis support becomes a permanently included element in the scope of tasks expected from the entity that is to perform the contract.

The same is for the internal communication issue. Respondents indicate that this area, along with crisis management and digital PR, is what may become increasingly important in the future. Internal communication has become crucial especially because of the following reasons:

- decreasing attachment of employees to the headquarters of individual companies, excluding production workers;
- increased employee turnover and a still-functioning employee market;
- increased expectations of employees towards their employers, especially in terms of flexible approach to their duties.

The changes that are occurring in the PR industry will affect, on the one hand, the functioning of PR agencies, which flexibly adapt to client requirements and emerging trends. On the other hand, it will also have an impact on employees, who will have to acquire knowledge not only in the field of psychology, but also in analytical areas, in order to skilfully and accurately respond to the needs reported by the clients of PR agencies.

However, these changes will certainly contribute to the professionalisation of the industry and the profession. In the near future, mainly those agencies that employ versatile specialists or skilfully use the benefits of outsourcing will be competitive on the market.

Table 4. Demand for PR task areas in the opinion of PR specialists

PR areas — trends (%)*	Demand will increase (%)	Demand will remain unchanged (%)	Demand will decrease (%)
Crisis management	76.7	15.8	7.5
Digital PR	71.6	18.2	10.2
Internal communication	51.0	29.5	19.5
CSR	42.6	22.8	34.6
Influencer relations	32.9	26.6	40.5
Employer branding	32.3	33.2	34.5
Media relations	31.3	43.8	25.0
Lobbying and public affairs	29.4	42.9	27.7
Investor relations	26.1	51.3	22.7
Research, research projects and evaluations	24.7	32.9	42.4
Corporate identity	23.8	50.2	26.0
Event management	10.7	11.2	78.1
Sponsoring	8.8	28.0	63.2
Total average	35.5	31.2	33.2

CSR, corporate social responsibility; PR, public relations.
*Values in this table have been rounded; so they may not add up to 100%.
Source: Own elaboration based on research.

Summary

The results of the research presented in this paper have allowed us to gain unique knowledge about the Polish PR services sector. By consolidating information obtained directly from agencies, a huge number of databases and other sources, we have obtained knowledge that shows the potential of the PR market, with particular emphasis on the role of PR agencies. The available estimates show that, on average, every fourth professional dealing with issues related to PR and communication in Poland is an employee of a PR agency (Szuba, 2022). As a result, agencies are the glue that holds the entire industry together, have a real impact on shaping its condition (especially those affiliated with industry-oriented organisations) and serve as the primary service provider. Experience shows that working in an agency is often a starting point or a stage in the career development process of PR specialists.

It should be emphasised that, in Poland, there are 18 network agencies, meaning agencies based outside of Poland or belonging to international networks. The entry of international network agencies was a result of market evaluation and its potential noticed in foreign reports that estimated the value of the PR sector in Poland (Rydzak, 2009). Networking is usually a guarantee of quality for customers who represent socially known brands. It is also a strongly developed aspect of procedures and standards of international importance (Hejnowski, 2016). During the analysis, it turned out that agencies associated in one of the two leading industry organisations (SAPR and ZFPR) in Poland generate significantly higher revenue (an affiliated agency is nearly four times the average), generate significantly higher profit (affiliated agency is 3.6 times higher on average) and also have a longer history of functioning in the market (they operate, on average, 1 year longer) than entities remaining outside the indicated associations.

The analysis provides a picture of the Polish PR service centre located in Warsaw and in the Mazowsze region. Warsaw is a city where 55% of the surveyed agencies are located. The following regions, in terms of the number of PR agencies, are as follows: Małopolskie (8%), Dolnośląskie (8%), Wielkopolskie (7%) and Śląskie (6%). It can be concluded that there is increased competition among PR firms in the above regions. The results of the research confirm, first of all, the fact that PR must be near the decision-making centres. It is in Warsaw where most of the large corporations and entities that use such services are based. Secondly, it confirms the fact that PR must be close to the national media, because still one of the key areas of PR activities is media relations, including modern media (Tworzydło, Gawroński & Szuba, 2020). The research allowed us to observe that in the surveyed population, 42% of entities have been operating for more than 1 decade, which only confirms that the industry has consolidated its position and strengthened its role in the Polish economy. However, there is still no reliable comparative analysis with other countries, e.g. with the British Isles — the largest European market of PR services.

From all the analyses that have been conducted, there also emerges a picture of a statistical PR agency in Poland. It is an entity functioning as a limited liability company, with rich experience, which can be expressed by the period of functioning on the market, as well as the way it communicates with the market environment. However, it is an entity that sporadically cooperates with industry organisations and selectively shares detailed information on the specifics of its operations and performance, e.g., the minimalism of its financial statements confirms this. PR agencies — as the authors of this article aimed to prove — constitute a key element of the PR industry and, more broadly, of communication consultations in Poland. According to estimates, Polish PR agencies employ >11,000 consultants using various forms of cooperation. For comparison, about 14,500 PR specialists work in private companies (which are not PR agencies), forming the so-called in-house PR services of the organisation. This group is the largest part of the PR market structure in our country (Szuba, 2022).

Endnotes

[1] In this article, to avoid repetition, the terms PR agencies and PR firms are used interchangeably.

[2] It is assumed that the first PR agency, First Public Relations — headed by Piotr Czarnowski, was created in 1990; https://www.firstpr.pl/o-first-pr, accessed 02.05.2022.

[3] This article presents the results of the study 'Analysis of the market of PR agencies' services', which was conducted between November 2020 and July 2021 under the supervision of the authors of the publication. The institutional partners of the project were Maria Curie-Skłodowska University in Lublin, the Faculty of Journalism, Information and Bibliology at Uniwersytet Warszawski and the Think Tank operating within the Public Relations Agencies Association (SAPR).

[4] The possibility of using desk research as a separate and independent research technique is indicated, among others, by Zofia Bednarowska-Michaiel (after: Bednarowska-Michaiel, Z. (2015). Desk research — wykorzystanie potencjału danych zastanych w prowadzeniu badań marketingowych i społecznych, Marketing i Rynek, nr 7, p. 19).

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