PRBI SURVEY IDENTIFIES INTERNATIONAL COMMUNICATIONS TRENDS

A new international survey commissioned by Public Relations Boutiques International (PRBI), a network of 42 boutique agencies, showcases the most important communications trends and objectives based on targeted questioning of companies in North and South America, Europe and Asia. The most significant results are the increasing dissolution of the traditional boundaries between PR and marketing; constant or growing communications budgets; and the increasing importance of boutique agencies, which are highly valued because of their significant, senior-level expertise, their personalized and independent service, as well as specialized experience.

In total, the survey results reflect input from 32 companies with headquarters in the United States, Canada, Germany, Austria, Brazil, India, Hungary and Italy. These corporations represent very different industries and industrial sectors, and their revenues vary greatly. Two-thirds of the respondents hold communications and/or marketing positions, and the rest identify themselves as either CEOs or as working in another area.

Almost all survey participants indicated that support of general corporate goals is the top priority of an effective communications strategy. Communications must therefore have a positive effect on external audiences and demographics, and increase corporate growth and profit. In addition, measurable successes in the form of positive media coverage, and/or influencing corporate information flow, were also seen as very important goals.

Other survey results:

- Communications results are increasingly measured through social media resonance including the number of comments and subscribers.
- Content development and social media are gaining importance and 40% of respondents said that they spend between 21-30%of their PR budgets in this area.
- Traditional PR work and media coverage remain essential.

Communications Trends

Supporting the corporate strategy is the most important goal of communication, as reported by 78% of respondents, to influence the external environment to allow the company to grow in the most profitable way. Managing the company's news and creating positive media coverage ranked as the third most important goal.

Other findings included:

- Most respondents reported that the budget for communications is projected to stay the same or rise by 1-10% in 2018.
- Almost half of respondents spend 11-25% of their marketing budget on PR.
- Results are increasingly measured by indications from social media – engagement, followers, and comments – as well as traditional media coverage and by sales leads.
- Areas of growing importance for communications programs include social media and content creation, with 40% of those surveyed reporting that they spend 21-30% of their PR budgets in these two areas.

To obtain a copy of the survey, visit prboutiques.com/prbi-survey-identifies-international-communication-trends/.

About PR Boutiques International™

PRBI is an international network of boutique public relations firms. The principals of member firms are experienced practitioners who have held senior positions in large PR agencies and/or corporations, but now put services first and work directly with clients. PRBI member firms excel in meeting a huge range of client needs in a large number of industries, with services that include corporate public relations, consumer PR, health care PR, investor relations, crisis management, business-to-business PR, economic development PR, not-for-profit, academia, government, financial, technology, legal, multicultural and international PR. Member practitioners have won the highest levels of professional awards, and boast qualifications ranging from PhDs to former top journalists to attorneys. They also represent memberships in the most noteworthy international public relations and business associations. For more information, visit prboutiques.com

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Q1: In which country are you working?

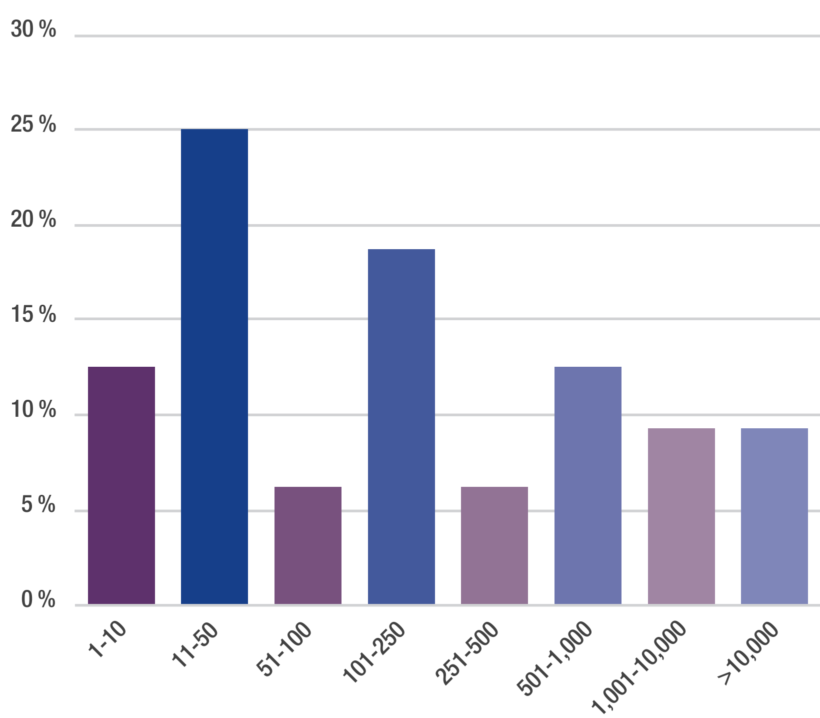
Answered: 32 Skipped: 0

#	Country	People
1	United States	10
2	Germany	7
3	Australia	4
4	UK	4
5	Brazil	2
6	India	2
7	Hungary	1
8	Italy	1
9	USA & Canada	1

Out of a sample of 32, the largest group of respondents represented the United States with almost 1/3 of the total responses. Other countries represented include Germany, Austria, UK, Brazil, India, Hungary, Italy and the combined USA & Canada.

Q2: How many employees do you currently have?

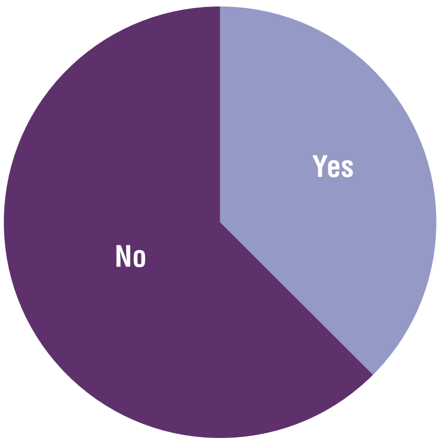
Answered: 32 Skipped: 0



Out of the 32 surveyed on how many employees they have, the largest segment – 25% – had 11-50 employees.

Q3: Is your company a subsidiary of an international business?

Answered: 32 Skipped: 0



Answer Choices	Responses	People
Yes	37.5%	12
No	62.5%	20

The majority of respondents - 62.5% - report that their companies are not subsidiaries of international businesses.

Q4: What are your company's total annual revenues (approximate)?

Answered: 25 Skipped: 7

Answer Choices	Companies
More than 1 Billion	6
500 Million - 1 Billion	3
100-499 Million	1
1- 99 Million	9
Under 1 Million	2
N/A	4

The majority of the respondents have estimated revenues of between $1,000,000 and $35,000,000. Twenty percent of firms surveyed had revenues of more than $1 billion.

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Q5: In which industrial sector does your firm operate?

Answered: 32 Skipped: 0

Industries	%	#
Administration/Public Sector	0%	0
Construction	3%	1
Education	3%	1
Energy & Utilities	9%	3
Financial Services	6%	2
Healthcare & Pharmaceuticals	16%	5
Manufacturing	0%	0
Media & Entertainment	16%	5
Non-Profit Organization	9%	3
Retail & Consumer Goods	12.5%	4
Technology & Communications	19%	6
Industrial Transport	3%	1
Travel, Tourism & Leisure	0%	0
Other (please specify)	25%	8

Respondents represented a variety of industry sectors. The largest number of firms originated in the Healthcare & Pharmaceuticals, Media & Entertainment, and Technology & Communications industries.

Q6: What is your job title?

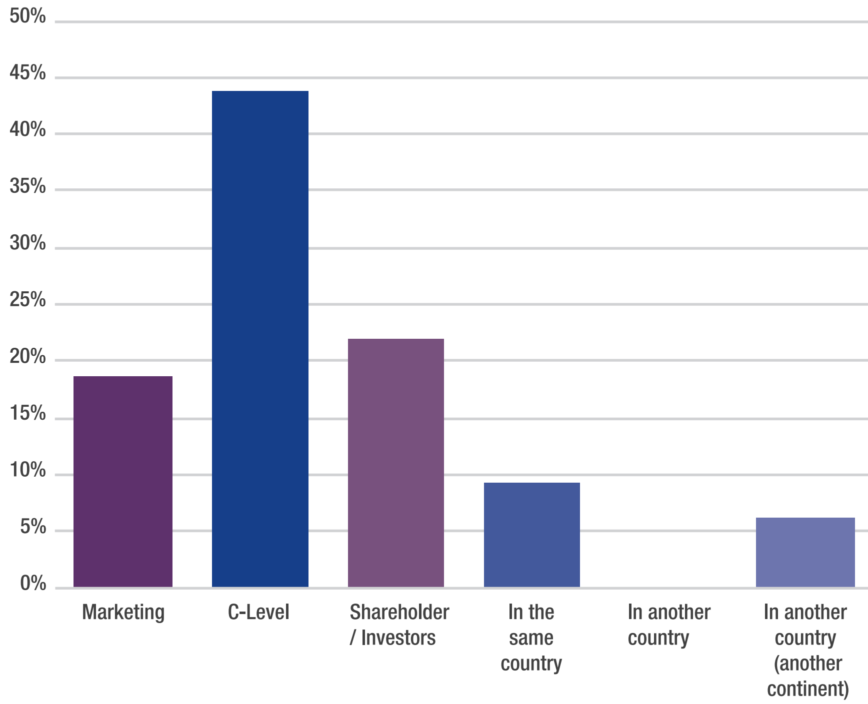
Answered: 31 Skipped: 1

Title	#
Communications Sector	11
CEO	5
Marketing	10
Other	5

One-third of respondents were in communications, one-third in marketing, one-sixth described themselves as CEOs, and one-sixth had other job titles.

Q7: To whom do you report your communications results?

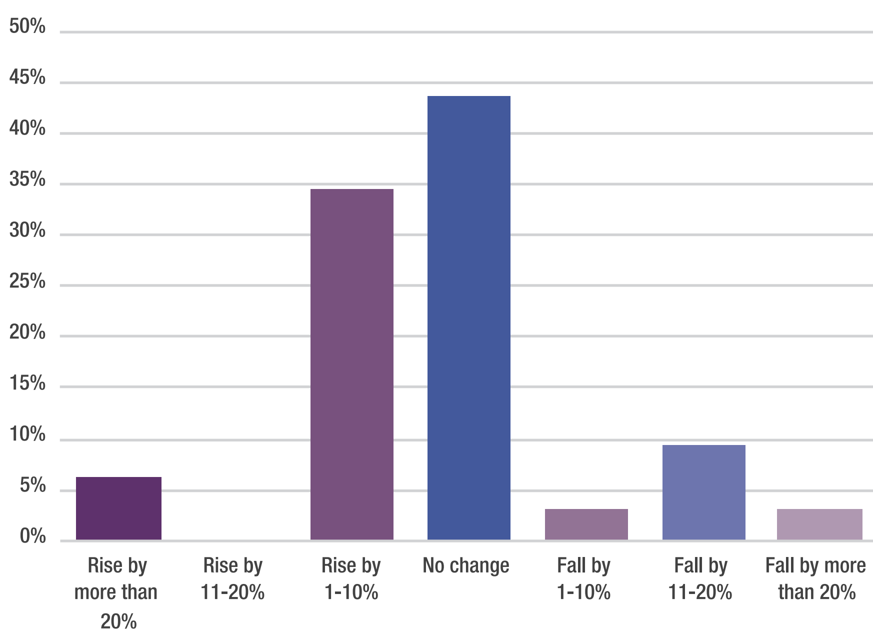
Answered: 32 Skipped: 0



The majority of those surveyed report communications results to C-Level executives, followed by Shareholders/Investors and Marketing.

Q8: In 2018, will your communications budget rise or fall?

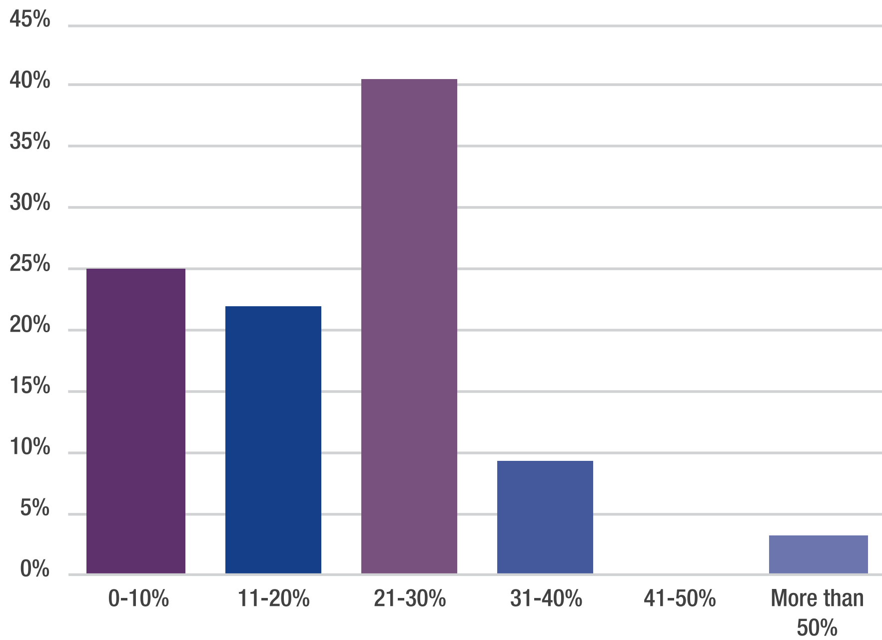
Answered: 32 Skipped: 0



Overall, four out of ten respondents project their communication budgets will remain stable or increase in the near future. Only 3% anticipated a budget decrease, and 6% predicted an increase of more than 20%.

Q9: How much of your PR spend do you devote to content marketing and social media?

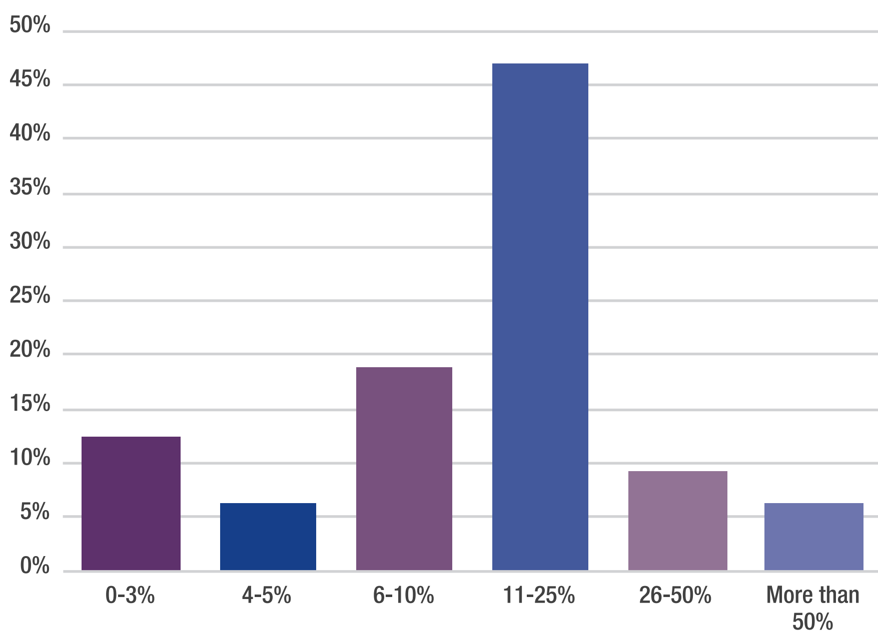
Answered: 32 Skipped: 0



Four out of ten report that 21-30% of their PR spend is devoted to content marketing and social media. One respondent dedicates more than 50% of their budget to these areas. One in four spends 10% or less of their PR spend in these areas.

Q10: How much of your marketing budget do you devote to PR?

Answered: 32 Skipped: 0



The largest number of survey respondents – 47% - report using 11-25% of their marketing budget for PR, while, 12.5% report a 0-3% spend.

Q11: What tools and/or key metrics do you use to evaluate the effectiveness of your PR program?

Answered: 32 Skipped: 0

Answers	%	#
Sales contacts as results of PR and communications	56%	18
Social signals, e.g. comments, likes, retweets, mentions, etc.	78%	25
Share-of-voice analysis compared to competitors	28%	9
Follower numbers on our social media platforms	44%	14
Changes in perception, attitude and popularity tracked by a third party provider	28%	9
Click-through rate to a link mentioned in content	34%	11
Advertising Value Equivalents (AVEs)	25%	8
Coverage amount	56%	18
Coverage tonality	47%	15
Cost per thousand (impressions)	19%	6
Other	3%	1
We do not evaluate the effectiveness of our communications work	3%	1

When asked how they measured results, 78% use social signals (i.e. comments, likes, retweets and mentions) while 56% use coverage amount and/or sales contacts that resulted from PR and communications. More than four out of ten also use coverage tonality and social media followers as metrics.

Q12: Which statement would you most agree with, concerning the business impact of your communications works?

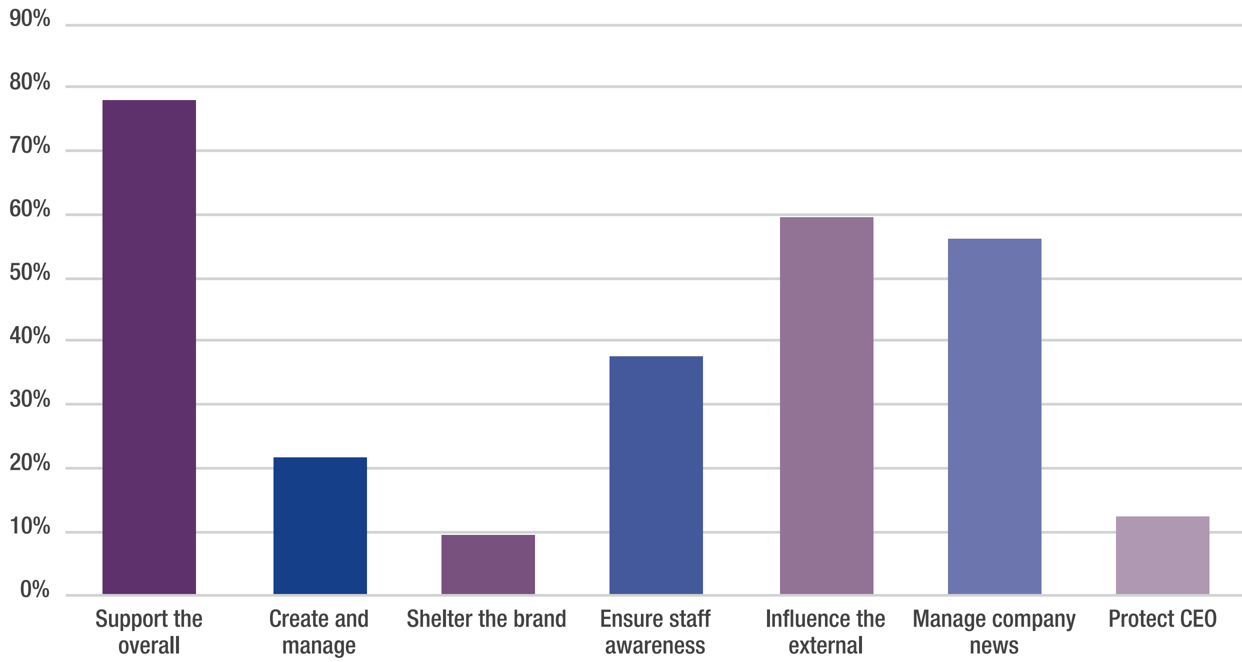
Answered: 31 Skipped:1

Answers	%	#
We cannot properly evaluate the contribution that our communications work makes to the success of the business	6%	2
We are developing evaluation models that display how communications support the business's core metrics	35%	11
For some of our work, we can display the concrete difference our work makes to the business	19%	6
We make a concrete contribution to the success of the business but there is no reliable internal performance data	19%	6
We can immediately show sales leads and/or sales from our communications work	6%	2
We can immediately show changes in image perception from our communications work	10%	3
PR and communications cannot demonstrate real business impact like other marketing disciplines	3%	1

One in three respondents are developing models to evaluate how communications support the business's core metrics. One in five believed their communication work contributed to business results but did not have data to support this belief, and one in five stated that they had evidence that some of their work produced business results. One in ten can show immediate changes in image perception.

Q13: What are the most important goals for corporate communications for your company?

Answered: 32 Skipped: 0



Answer	%	#
Support the overall corporate strategy	78%	25
Create and manage understanding of the corporate strategy among the stakeholders to ensure their support	22%	7
Shelter the corporate brand from crisis and concerns	9%	3
Ensure that the staff is aware of the corporate messages and communicates them properly	37.5%	12
Influence the external environment to allow the company to grow in its most profitable way	59%	19
Manage the company's news and create positive media coverage	56%	18
Manage and protect the CEO's profile	12.5%	4

Supporting the corporate strategy is the most important goal of communication, as reported by 75% of respondents. Six out of ten strive to influence the external environment to allow the company to grow in the most profitable way. Managing the company's news and creating positive media coverage ranked as third most important goal.

Q14. Communications is constantly changing. What trends or changes are you seeing in your markets that impact the success of your communications program?

Answered: 22 Skipped: 10

1. ONE: Our markets and user segments exist across border, so PR and communications has to follow. Country-level coverage is no longer good enough. TWO: In health tech, perceptions are created through credibility. Credibility is backed by research and data. This influences what, where and to whom we say what we do.
2. Real stories that impact life
3. The last election has shifted focus from climate change to rural economic development
4. One on one communications with stakeholders through email newsletters, which gives a personal touch to our work
5. Digital
6. Over exposure by a number of brands with accessibility to multiple social content platforms
7. SPAM filters are blocking some of the messages sent out through our Constant Contact application or emails sent with a PDF attachment
8. "Down to top" communication, employees and client inclusion, employees advocacy, storytelling
9. More use of social media and more communications channels than ever
10. Today trust is everything. Companies need to deliver what they are promising.
11. Relevance of webshops constantly growing as sales channel but also opinion leader platform
12. Harder to cut through
13. Social/digital marketing
14. Customer centricity, digitization, earned media
15. Being able to communicate directly with our target audiences
16. Social media, video becoming increasingly important
17. Individualized communications - storytelling
18. Industry 4.0, digital transformation, employees' access to digital platforms
19. Growing cross media market
20. Social media
21. In the last few years, providing useful content to clients and prospects started to bring more results than pure advertising.

Survey participants cited the growth of social media and storytelling to connect with their target audiences. Other trends listed included cutting through the clutter, the shift to content marketing from advertising, and one on one communication with stakeholders.

Q15. What's trending with the basic PR Tools? Please rate from 1 (becoming less important) to 5 (becoming more important)

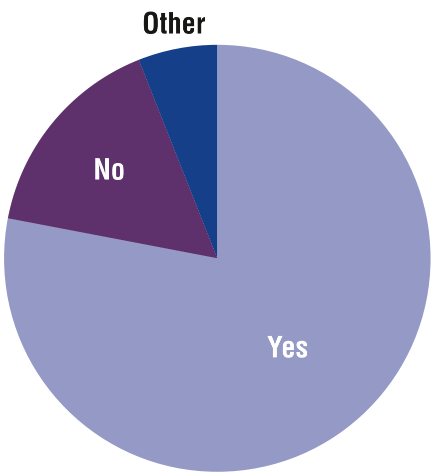
Answered: 22 Skipped: 10

Trending PR Tools	1	2	3	4	5
Press releases	3%	34%	41%	14%	7%
Visual communication tools	0%	6%	10%	48%	35%
Photos	0%	3%	29%	39%	29%
Infographics	3%	6%	34%	31%	25%
Video	3%	0%	3%	55%	37%
Advertising/sponsored content (paid)	7%	27%	37%	23%	7%
Google Adwords	9%	25%	32%	25%	9%
Media print	10%	35%	29%	23%	3%
Media online	0%	13%	23%	35%	29%
TV	26%	29%	32%	13%	0%
Outdoor	29%	42%	26%	3%	0%
Radio	33%	30%	30%	7%	0%
Cinema	53%	30%	13%	3%	0%
Blogs	10%	6%	26%	45%	13%
Social media (unpaid)	3%	0%	12%	44%	41%
Facebook	2%	19%	29%	32%	16%
LinkedIn	6%	10%	32%	29%	23%
Twitter	6%	19%	23%	35%	16%
Instagram	0%	19%	32%	26%	23%
Snapchat	17%	43%	13%	23%	3%
Events	3%	16%	35%	26%	19%
Meetings	3%	19%	39%	26%	13%
Press trips/conferences	10%	26%	35%	19%	10%
Launch events/road shows	6%	13%	45%	23%	10%
Stakeholder events	3%	17%	37%	30%	13%

PR tools ranked as growing in importance were social media (unpaid), video, visual communication tools, photos, on-line media and info graphics.

Q16: Does your firm work with a PR Agency?

Answered: 32 Skipped: 0



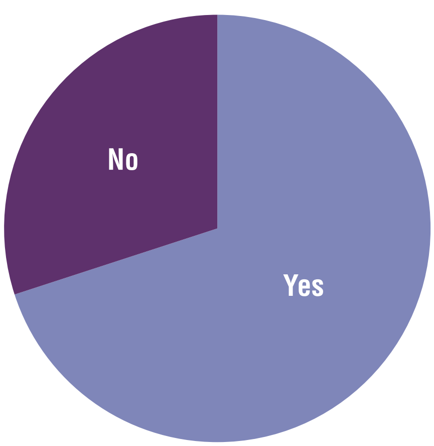
Answer	%	#
Yes	78%	25
No	16%	5
Other*	6%	2

Eight out of ten respondents report that their firms work with PR agencies.

*Marketing, digital, media placements, communications agency

Q17: Do you consider it important for the agency you're working with to have relationships with other agencies (such as an affiliate network of independent agencies)?

Answered: 30 Skipped: 2

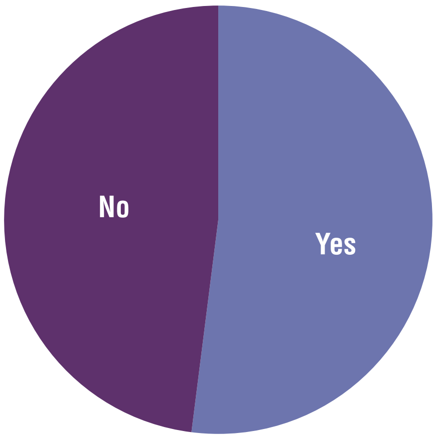


Answer	%	#
Yes	70%	25
No	30%	5

Seventy percent of survey participants say that it is important for the agencies they work with to be involved with other agencies (i.e. be part of affiliate networks).

Q18: Is your agency part of a global network with offices across the continent/the world?

Answered: 29 Skipped: 3

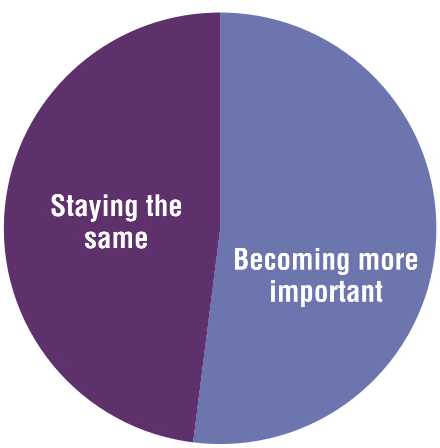


Answer	%	#
Yes	52%	15
No	48%	14

About half of respondents reported their PR agencies were members of global networks.

Q19: What is trending with agency networks?

Answered: 29 Skipped: 3

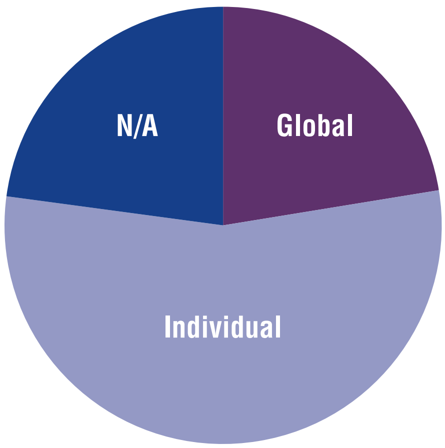


Answer	%	#
Becoming more important	52%	15
Staying the same	48%	14
Becoming less Important	0	0

Half of respondents indicated that membership in global agency networks was becoming more important to them

Q20: Would you personally prefer a global network (owned by one company) or affiliate network with independent agencies?

Answered: 31 Skipped: 1

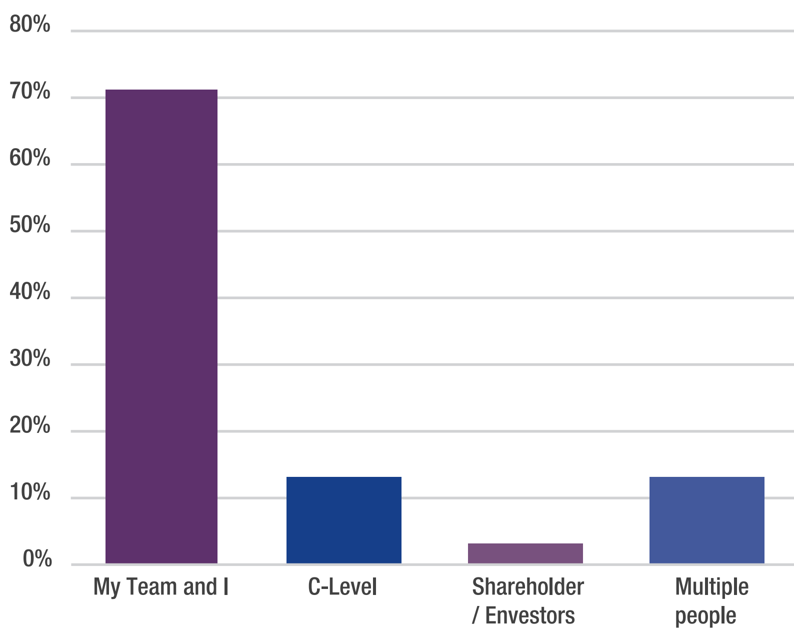


Answer	%	#
Global network	23%	7
Individual, owner-based agencies that form an independent network	55%	17
International does not matter to me	23%	7

More than half of respondents prefer a network of individual agencies (independent network) over a global network, owned by one company. One in five are not interested in international reach.

Q21: Who decides on the selection of which network: global vs. independent?

Answered: 31 Skipped: 1

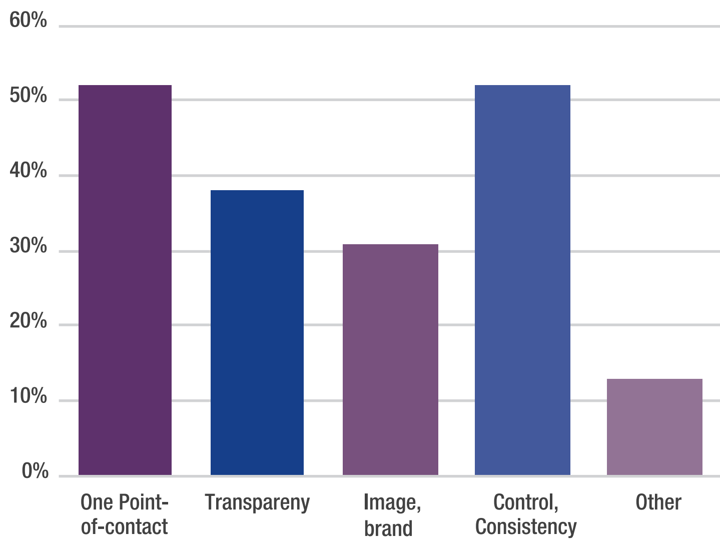


Answer	%	#
My team and I	71%	22
C-Level	13%	14
Shareholder/Investors	3%	1
Multiple people from multiple levels/ departments	13%	4

Most respondents indicated that the decision to select either global or independent networks lies with their teams, not with C-Level executives or shareholders/investors.

Q22: If you would consider working with a global network, what do you see as advantage of a global network vs a small boutique agency?

Answered: 29 Skipped: 3

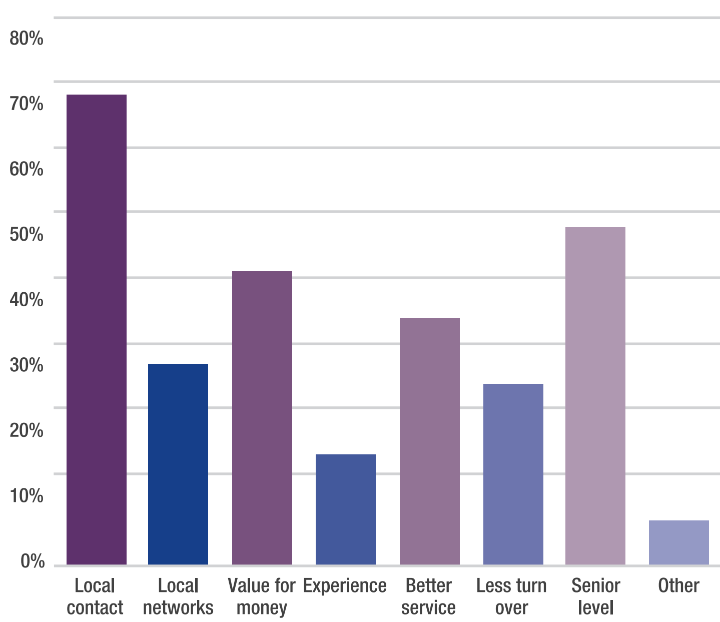


Answer	%	#
One point-of-contact	52%	15
Transparency	38%	11
Image, brand of the network	31%	9
Control, consistency	52%	15
Other	13%	4

The advantages of a global network vs. a small boutique agency are having one point-of-contact and having control and consistency. There is also value placed on transparency, image and the branding of the network.

Q23: If you would consider working with a boutique PR agency, what do you see as the advantage of a boutique agency vs a larger agency?

Answered: 29 Skipped: 3

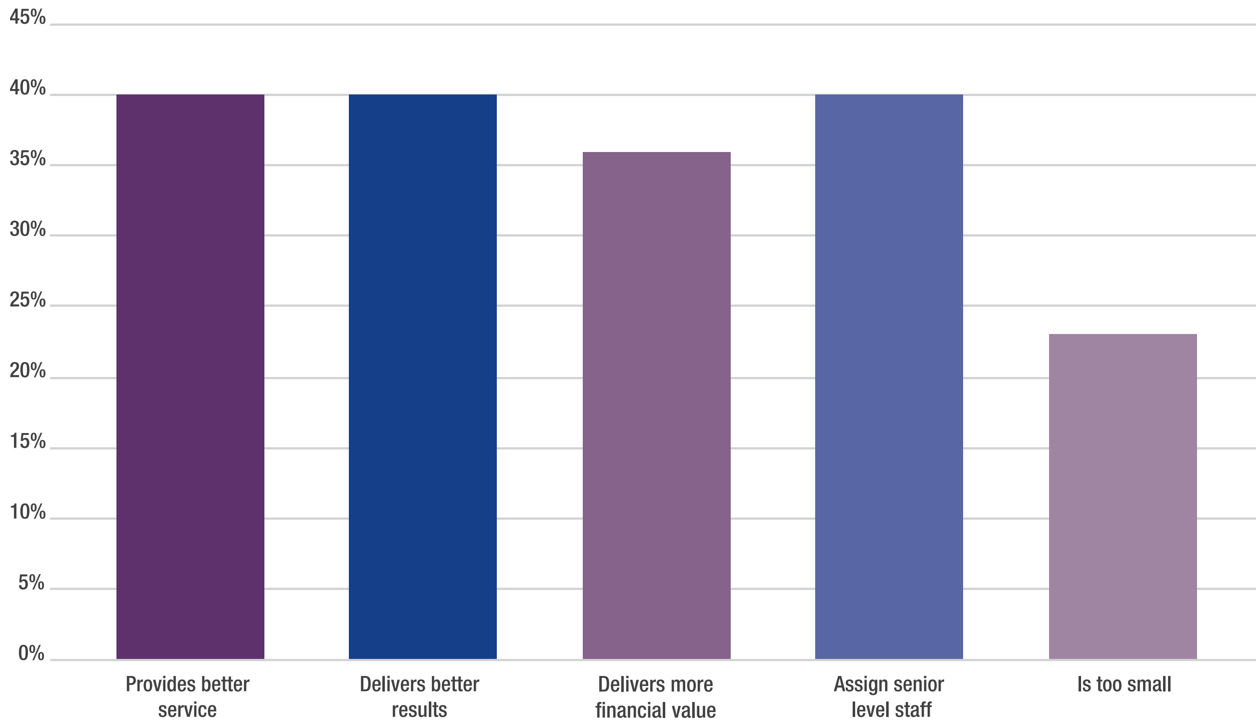


Answer	%	#
Local contact and relationship	72%	21
Local networks	31%	9
Value for money	45%	13
Experience	17%	5
Better service	38%	11
Less turnover with contact persons	28%	8
Working with senior level experts	52%	15
Other	7%	2

The top three advantages of using a boutique agency over a larger agency are local contacts and relationships, working with senior level experts, and the value for the money spent. One in four respondents believe that boutique agencies provide better service.

Q24: You have chosen to engage a boutique PR firm for your company. Please rate the following attributes in order of 1-5, with 5 being most important, in you assessment of the value of your boutique PR agency.

Answered: 29 Skipped: 3

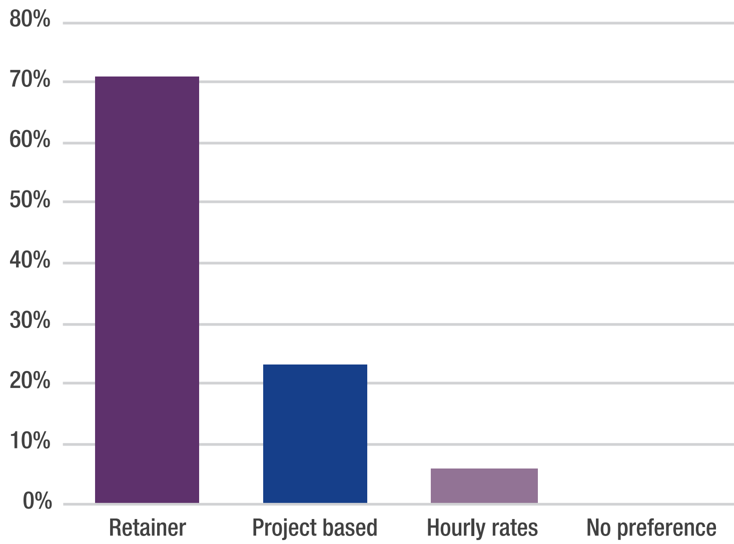


	1	2	3	4	5
Provides better service than larger agencies	3%	7%	20%	25%	45%
Delivers better results than larger agencies	3%	3%	24%	28%	41%
Delivers more financial value than larger agencies	6.9%	3%	38%	20%	31%
Assign senior level staff to my account	3%	6%	14%	41%	38%
Is too small to handle all of our needs	36%	25%	18%	7%	14%

The most important attributes of boutique PR agencies are getting senior level staff assigned to their accounts, receiving better service than larger agencies, and the boutique agency's ability to deliver better results than larger companies.

Q25: Which billing model do you prefer?

Answered: 31 Skipped: 1

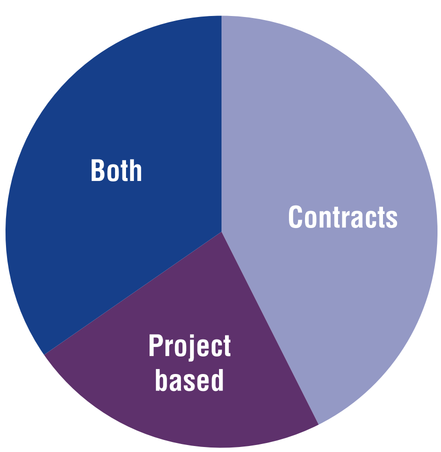


Answer	%	#
Retainer 12 x per year	71%	22
Project based	23%	7
Hourly rates	6%	2
No preference	0%	0

The preferred billing model for 70% of respondents is paying a retainer 12 times per year, while 23% prefer a project-based model, billing by hourly rates ranking last in preference.

Q26: Do you work with yearly contracts or project-based?

Answered: 31 Skipped: 1



Answer	%	#
Contracts	43%	14
Project based	23%	7
Both	35%	11

Four out of ten respondents have yearly PR agency contracts, with others working with a combination of annual contracts and project-based work. Project-based models alone are used by one in five respondents.

Q27. Do you have any comments on communications trends/or the value of the global boutique PR network or a boutique PR agency?

Answered: 3 Skipped: 27

- Prefer boutique agency over global. Team members are more dedicated to their clients.
- No border between PR and marketing, content rules
- Global networks don’t always have the right skills. Selecting agencies by market allows us to get to the specialist in each market.

Survey participants indicated a preference for boutique agencies over global because of team member dedication and the ability to select agencies by market and have specialists in each market.