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State of the PR Landscape in Southeast Europe 2023

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Foreword

Renna Markson
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For PRCA, a greater emphasis on robust evaluation is key to unlocking understanding of public relations and we look forward to supporting our members in making this happen.

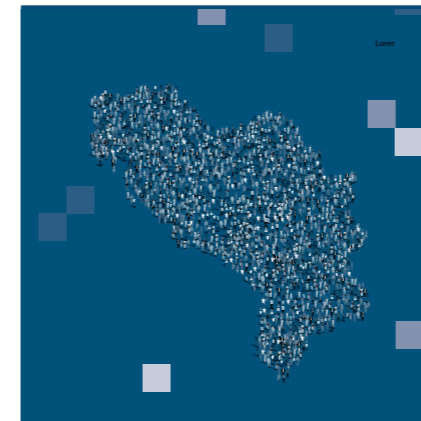
Welcome to the State of Southeast Europe PR Landscape Report, a significant milestone for PRCA Southeast Europe, the newest network of the world's largest professional PR organisation.

This report on the PR landscape in Southeast Europe indicates an industry undergoing change. The challenges and opportunities presented by new technology sit alongside more traditional PR activities such as media relations, event planning and corporate reputation management. Digital content is up, traditional channels such as newsletters are becoming less important.

PR practitioners do not operate in a vacuum. The long-term effects of the COVID-19 pandemic continue to reverberate throughout the economy. That manifests itself in reduced budgets but also a growing demand for internal communication. This latter may be a result of a flexible or hybrid working model which remains important for nearly four in ten of our respondents. PR continues to battle for its place in the boardroom. Savvy leaders understand the importance of investment in PR for underpinning the reputation of their organisations. But the industry remains slow to adopt the modern measurement and evaluation methods that might convince boards of our industry's impact. For PRCA, a greater emphasis on robust evaluation is key to unlocking understanding of public relations and we look forward to supporting our members in making this happen.

I am grateful to the members of the PRCA Southeast Network, Danijel Koletic, Katja Fašink, Eleonora Albijanic and Nadja Lutvikadic-Foco for their contributions to this research programme. This report provides key insights that will help us to work together with PR professionals across the region. PRCA looks forward to supporting the industry through this time of change and laying foundations for future prosperity.

Executive Summary



The industry's ethical standing appears moderately favourable, though it calls for continued efforts to uphold ethical standards.

The PR landscape in Southeast Europe in 2023 reflects a field in transition. PR professionals wear multiple hats, with communications strategy development and general media relations at the forefront of their roles. Notably, digital/social media has emerged as a top priority, signalling the industry's adaptation to the digital era.

However, challenges persist in asserting PR's value at the boardroom level, with a significant portion of practitioners feeling undervalued or constantly needing to prove their worth. Additionally, there's a growing interest in technology-related training, underpinning the need to stay ahead in an ever-evolving field.

The industry's ethical standing appears moderately favourable, though it calls for continued efforts to uphold ethical standards. As Southeast Europe's PR landscape evolves, it must navigate challenges like reduced budgets, talent acquisition, and the impact of fake news while embracing comprehensive measurement and evaluation methods to demonstrate its value effectively.

METHODOLOGY

This year's the State of the PR landscape in Southeast Europe was issued in June 2023. The online survey was generated by 3Gem using two different sample sources:

- A targeted sample was sent to PRCA Southeast Europe Members and its database.
- Public on PRCA website and social media platforms.

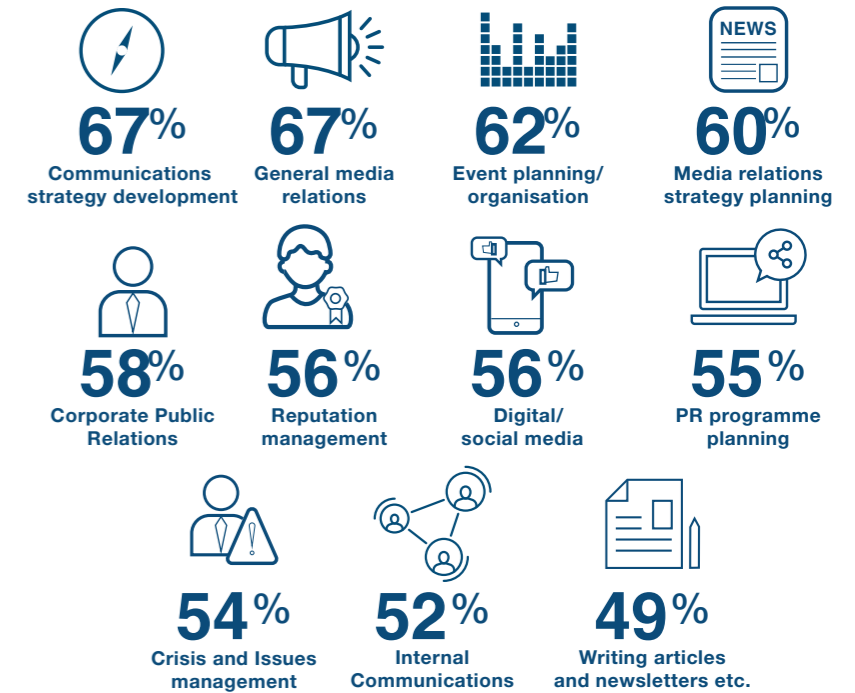
The fieldwork was conducted between the 12th of June to 15th of July 2023. The survey generated 139 responses. Respondents had to fulfill the following criterion: work in a communications or PR remit.

The Present Landscape

WHAT PR PROFESSIONALS DO

The roles of PR and communications professionals cover a wide range of responsibilities. We asked respondents to choose the main function or functions of their role from a list of options. The range of options selected by the respondents indicates the versatility required of PR practitioners.

Communications strategy development (68%) was the most common response, with general media relations following closely behind (67%). Other common responses were media relations strategy planning (60%), corporate public relations (58%), reputation management (56%) and digital/ social media (56%).

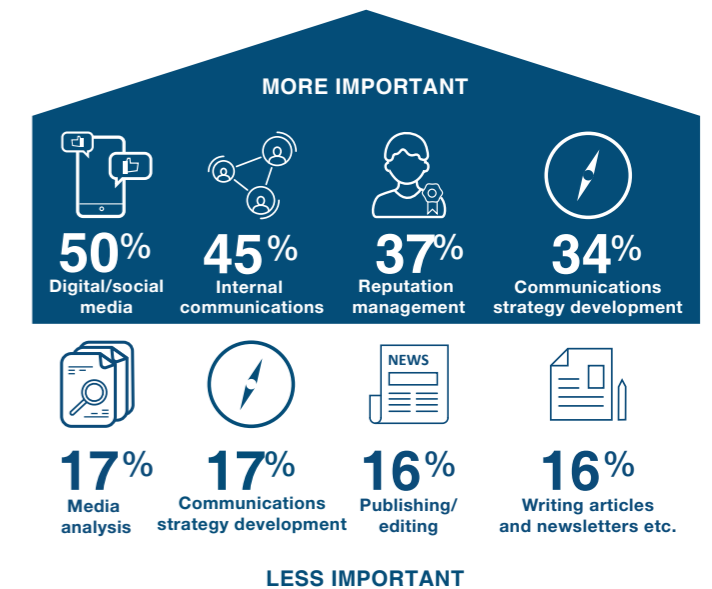


A CHANGING ROLE

Respondents were asked which PR activities they thought had become more important in their country in the past two years, as well as those which had become less important.

Interestingly, half of the practitioners selected digital/ social media (50%), and this is seen as the highest priority. This is followed by internal communications (45%). Reputation management (37%) and communications strategy development (34%) also ranked highly. When asked which PR activities had decreased in importance, the most common responses were media analysis (17%), communications strategy development (17%), publishing/ editing (16%) and writing articles and newspapers (16%).

The data highlights a dynamic shift in PR priorities in Southeast Europe with the rise of online engagement and organisational cohesion being evident. While strategic development is crucial, 17% noting its reduced importance suggests a recalibration of traditional approaches. Decreased emphasis on media analysis, publishing, and writing also signifies a move towards more interactive/ digital and real-time content strategies.



THE DATA HIGHLIGHTS A DYNAMIC SHIFT IN PR PRIORITIES IN SOUTHEAST EUROPE WITH THE RISE OF ONLINE ENGAGEMENT AND ORGANISATIONAL COHESION

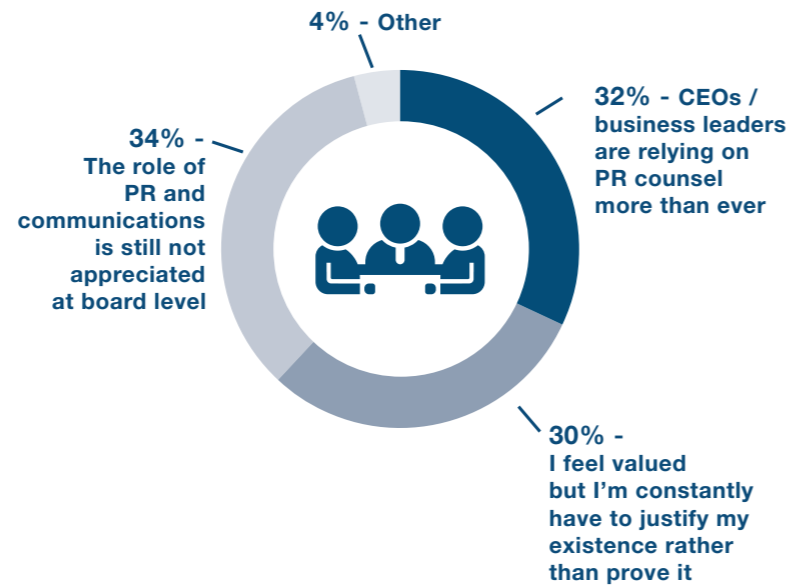
PR'S STANDING IN THE BOARDROOM

We asked PR practitioners to rank their experiences and to describe the standing that the field has within an organisation's boardroom.

A concerning figure is that 34% of respondents stated that the role of PR and communications is still not appreciated at board level – this was also the most selected option. 30% said that they felt valued but are constantly having to prove their value. Meanwhile, 32% said that CEOs/ business leaders are relying on PR counsel more than ever.

The results underpin a mixed perception of PR's significance within boardrooms. While 32% indicate a rising reliance on PR counsel and highlight the field's strategic importance, the majority ultimately feel as though they are not appreciated or that they must prove their value. This clearly underscores the ongoing challenge of substantiating PR's impact in organisational contexts.

IN YOUR EXPERIENCE, HOW WOULD YOU DESCRIBE PR'S STANDING IN THE BOARDROOM?



THE FEELINGS OF NOT BEING APPRECIATED OR HAVING TO PROVE THEIR VALUE CLEARLY UNDERSCORE THE ONGOING CHALLENGE OF SUBSTANTIATING PR'S IMPACT IN ORGANISATIONAL CONTEXTS

TRAINING NEEDS

Training and development are important for all industries. As such, we asked PR and communications practitioners in southeast Europe what training they would recommend in their region.

The top responses were communications strategy development (47%), crisis management (43%) and reputation management (38%). Interestingly, when asked which areas respondents would be interested in taking training sessions on, the 'metaverse' was selected 27% of the time and as a result, was one of the most selected options. This focus on technology outlines the importance of getting ahead of the curve and educating PR professionals within the region on contemporary matters such as artificial intelligence and how it will impact the sector.

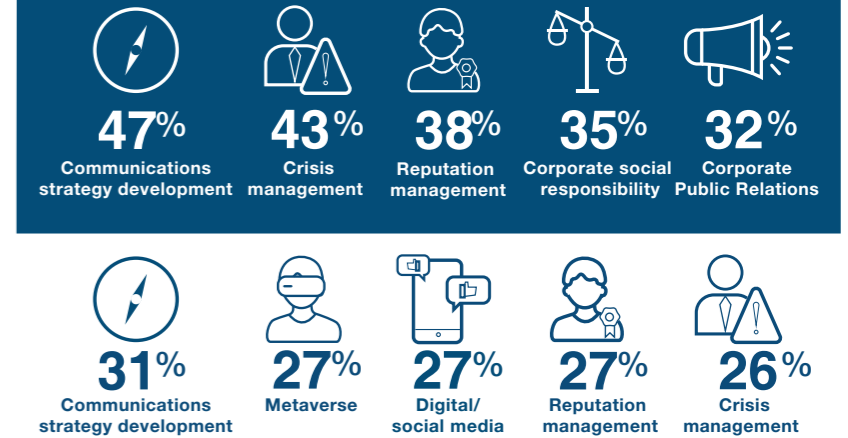
Other common selections were communications strategy development (31%), digital/ social media (27%) and reputation management (27%). The PRCA wishes to further their efforts in assisting southeast European PR practitioners in becoming more strategic and improving their standing in the boardroom. Training remains a priority and we will work closely together with members to support the industry across the continent.

WORKING MODELS

Regarding working models within the region, 57% of respondents reported working in the office full time, 32% said that they operate in a hybrid model, while 6% are fully remote.

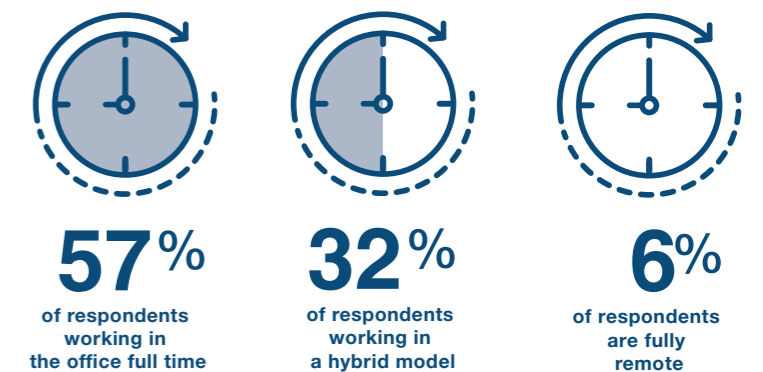
Interestingly, when asked which factors they would value most when considering a new role, flexible working was selected only 12% of the time, whilst remote working was selected only 5% of the time. Factors such as organisational values and purpose (35%), development opportunities (27%) and financial compensation (17%) all ranked higher.

WHAT TRAINING WOULD YOU RECOMMEND

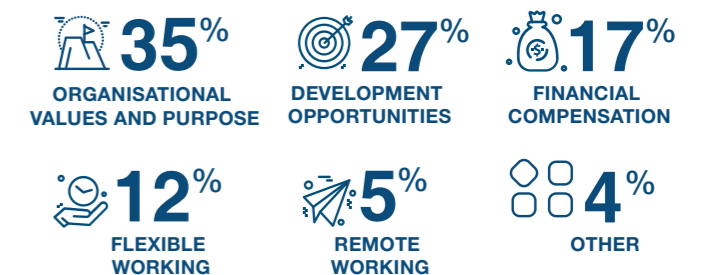


WHAT TRAINING WOULD YOU BE INTERESTED IN

WORKING MODELS



MOST VALUED FACTORS TO CONSIDER A NEW ROLE



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Ethics and Reputation in Southeast European PR and Communications

ETHICS

Ethical standards are crucial for PR and communications' best practices. All PRCA members must abide by, and are accountable to the [PRCA Professional Charter and Codes of Conduct](#).

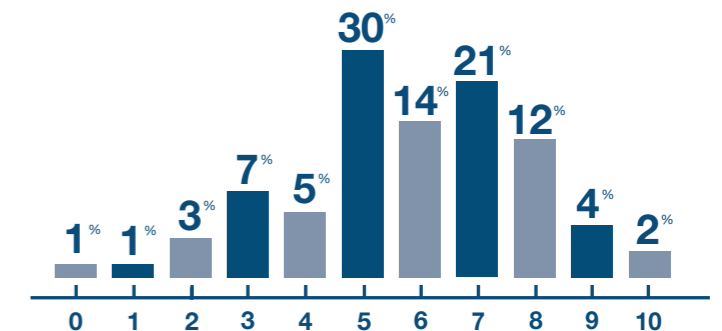
We asked PR practitioners in southeast Europe if they had been asked by someone to act in an unethical way, or had decided to do so, in the last 12 months. Most respondents said no (84%). However, 8% said that they had acted unethically, 4% were unsure if their actions were unethical and 4% did not wish to disclose this information.

Respondents were also asked to rate how ethical they thought the PR industry is regarded in their country, on a scale from zero to 10, with zero meaning not ethical at all and 10 meaning very ethical. Most respondents selected five (30%), followed by seven (21%) and six (14%). The mean average score is 5.8 in 2023. Consequently, PR's perceived ethical standing appears to be moderate, with a notable portion of practitioners placing it in the middle range of the ethical spectrum. This suggests a need for continued efforts to enhance and uphold ethical standards within the industry.

ACTING OR BEING ASKED TO ACT IN AN UNETHICAL WAY IN THE LAST 12 MONTHS

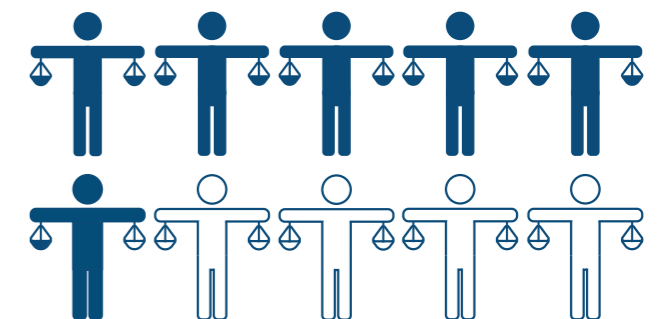


● Yes - 8% ● No - 84%
● Unsure - 4%



0 = not ethical at all, 10 = very ethical

Average: 5.8 out of 10



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PR & Comms in Southeast Europe *Navigating Opportunities and Challenges*

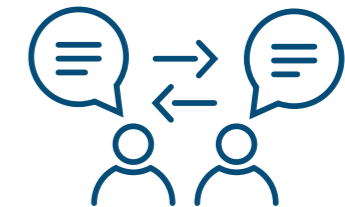
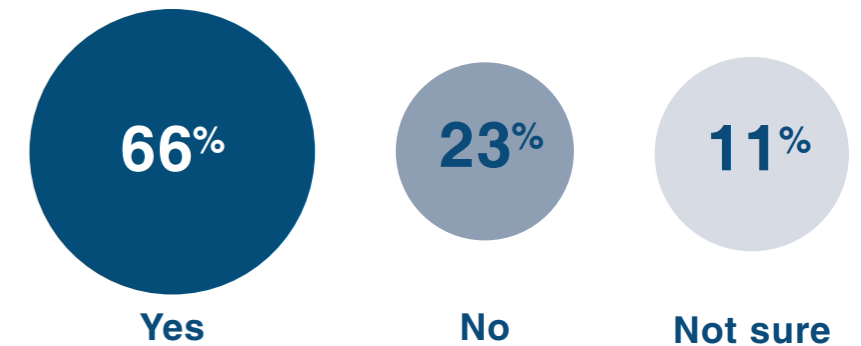
IS THE INDUSTRY RECESSION PROOF?

As the financial world continues to recover from the impact of COVID-19, other challenges loom. In this survey, we asked respondents to consider the importance of PR and communications and whether they felt that the perception of PR had improved, and if the industry would be utilised more if a recession were to occur.

The majority of practitioners (66%) responded with 'yes', whilst 23% responded with 'no' and 11% stated that they were 'not sure'. The data reflects a mixed sentiment within the PR industry regarding its role in the post-COVID financial landscape. A substantial number of practitioners express optimism about the growing importance of PR.

This suggests that many see PR as a crucial asset for navigating uncertain times and building trust. However, the presence of 23% who are less convinced and 11% who remain uncertain underpins the need for continued efforts to demonstrate PR's value in economic recovery. It is apparent that while a majority holds positive expectations, there is still work to be done to convince some stakeholders of the industry's pivotal role in turbulent times.

IS THE INDUSTRY RECESSION PROOF?



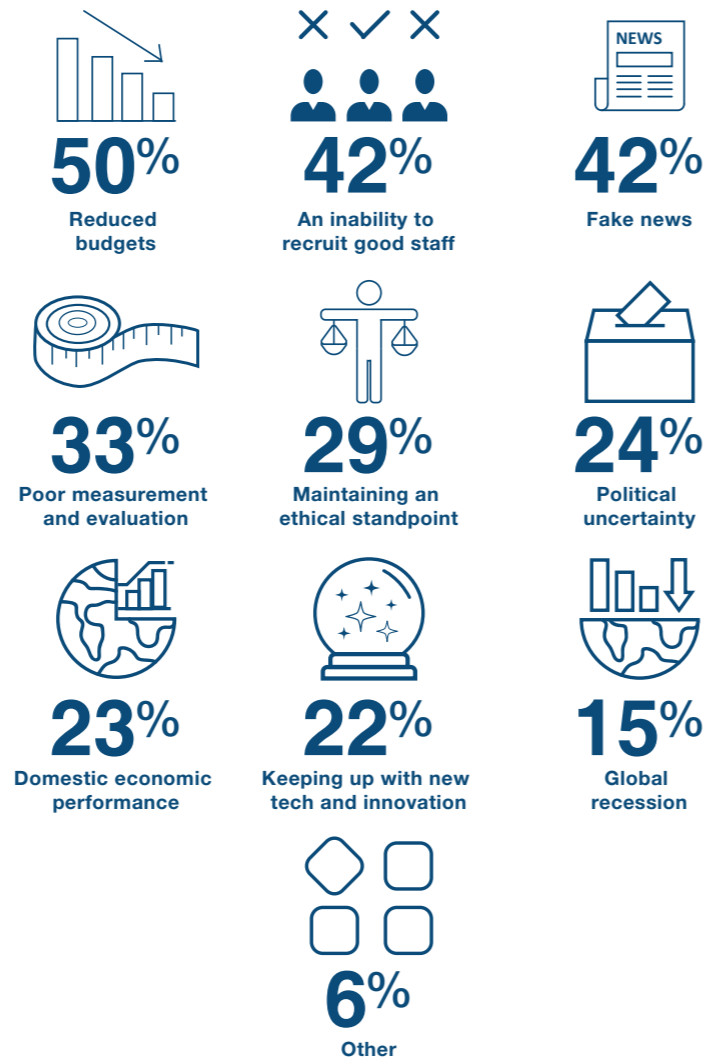
“ WHILE A MAJORITY HOLDS POSITIVE EXPECTATIONS, THERE IS STILL WORK TO BE DONE TO CONVINCE SOME STAKEHOLDERS OF THE INDUSTRY'S PIVOTAL ROLE IN TURBULENT TIMES. ”

FUTURE CHALLENGES

We asked respondents about the biggest threats facing the PR industry in the immediate future. The results show that reduced budgets (50%), an inability to recruit adequate staff with the right expertise (42%) and interestingly, fake news (42%) lead the way. Other major threats include the poor measurement and evaluation (33%), maintaining an ethical standpoint (29%), and political uncertainty (24%).

The data sheds light on the top concerns PR practitioners anticipate in the near future. Reduced budgets underline the ongoing financial challenges post-COVID. The struggle to secure specialised talent highlights the growing demand for PR expertise, which could strain the industry's growth potential.

The intriguing recognition of fake news as a significant threat underpins the importance of addressing misinformation and credibility issues in the digital age. Meanwhile, the concerns about measurement, ethical considerations, and political uncertainty reflect the multifaceted nature of challenges PR professionals face, emphasising the need for strategic agility and ethical resilience in the field.



“ THE RECOGNITION OF FAKE NEWS UNDERPINS THE IMPORTANCE OF ADDRESSING MISINFORMATION AND CREDIBILITY ISSUES ”



“ THE CONCERNS ABOUT MEASUREMENT, ETHICAL CONSIDERATIONS, AND POLITICAL UNCERTAINTY EMPHASIZES THE NEED FOR STRATEGIC AGILITY AND ETHICAL RESILIENCE IN THE FIELD. ”

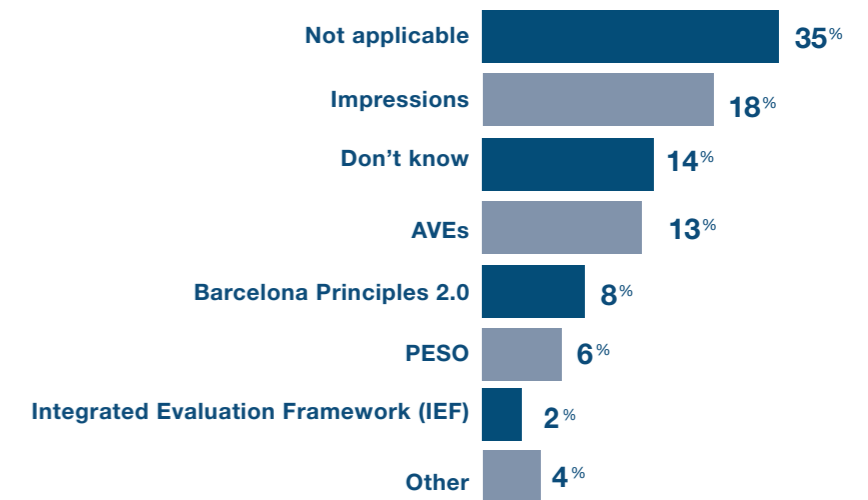
EVALUATING MEASUREMENT

With poor measurement and evaluation continuing to be one of the biggest threats to the industry, it is concerning to see that there has been no real growth in terms of adopting recognised evaluation methods. In fact, over a third of southeast European PR practitioners (35%) said that they do not use PR evaluation methods, whilst 14% said that they did not know.

The most common forms of measurement that are used are Impressions (18%), Advertising Value Equivalents (AVEs) (13%), Barcelona Principles 2.0 (8%), PESO (6%) and Integrated Evaluation Framework (IEF) (2%). The PRCA does not consider AVEs to be a rigorous or meaningful measure and believes strongly that other forms of measurement are always preferable.

Ultimately, the lack of adoption of measurement and evaluation methods is a significant concern for PR professionals in the region. Further education may help to bridge the gap, and it is essential for the industry to embrace more comprehensive and rigorous evaluation methods to demonstrate the value of PR to clients and stakeholders.

WHAT IS YOUR PREFERRED METHOD OF EVALUATION OF YOUR WORK?



Members of the PRCA Southeast Europe Network

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CEO, APRIORI World

Katja Fašink (Slovenia Chapter Chair)
Chief Communications Officer, ELES, d.o.o.

Eleonora Albjanic (Montenegro Chapter Chair)
Head of External Communications, Elektroprivreda Crne Gore AD Nikšić

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