

Research Findings
The State of Public Relations in Québec

Highlights

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Phase 1
Survey Results
(October 27 to December 5, 2003)

A. General Overview of Public Relations in Québec

Socio-demographic Profile

Main Characteristics

Strong presence of women: 70%

Includes both new and experienced professionals

• **Age**

- More than 60% are over 35 years of age
- Nearly 15% are under 25 years of age*

• **Professional experience**

- One third of PR practitioners have over 15 years of experience
- 30%: less than 5 years of experience*

*corroborating the influx of many young graduates into the profession

Educated and well-paid

• **Schooling**

- More than 85% hold a Bachelor's degree
- Primary fields of study:
 - public relations (42.5%)
 - communications (34.8%)

• **Income**

- Average salary: \$60,000
- 4 in 10 PR practitioners earn over \$66,000 annually
- 1 in 4 PR practitioners earn over \$80,000 annually

Job sectors

- Organizations: over 80%, excluding self-employed professionals.
(public/parapublic sector, companies, NPOs, associations)
– *Nearly half work in the public/parapublic sector*
- Consulting firms: 17.7%
(includes PR firms, PR department in advertising agencies and in other types of consulting firms)
- Recent trend
New professional category: 11% are self-employed

Note: A total of over 100% is reached due to a number of PR practitioners who work both for themselves and for an organization.

Work organization

Position

- Public relations managers: 42%
- Public relations practitioners: 53%

Position on the organization chart

- Half report directly to someone at the top level in their organization or firm.
 - Primary organizational unit: Head office or CEO's office (42%)
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Job titles

The most common

- Consultant: 28%
- Manager: 24%

Virtually extinct:

- "Relationniste" * (less than 1%)

* *Public relations practitioner (French title used exclusively in Québec)*

Areas covered

Geographic areas typically covered by Québec PR professionals

- 67%: the province of Québec
 - 21%: Canada
 - 5%: United States
 - 7%: other countries
-

Types of Responsibilities

Main PR activities, by order of importance

(identified by PR practitioners as very important or important)

- Strategic planning (79%)
 - Media relations (77%)

 - Event organization (72%)
 - Marketing communications (68%)
 - Internal communications (66%)
 - Issue management (60%)
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Daily Tasks

Most regular activities

(identified as very important or important)

- Writing/editing: 83%
- Consulting: 81%
- Strategic writing: 72%

Of note

- Research: 39%
- (surveys, group discussions, interviews, document analysis, etc.)
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Main Target Audiences

- Nearly three out of four PR practitioners communicate with the media on a regular basis.
 - Two out of three PR practitioners deal regularly with upper management.
 - Approximately 60% are in frequent contact with clients and their company's senior management and employees.
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New Information Technology

Positive outcomes

- Simplifies work methods
 - Provides for improved modes of communication
 - Allows for direct contact with the public
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Level of Satisfaction with Their Profession

Very high level of satisfaction

- More than 90% are very satisfied or satisfied with their career
- Nearly all (99.4%) wish to continue pursuing their career in PR

Career objectives

- For many, the field of public relations constitutes a professional career path: 33% want to increase their responsibilities, move up the corporate ladder and take on greater professional challenges.

Promising future for PR Practitioners

- The majority are optimistic about the future of public relations practitioners.
 - Many believe the importance of PR practitioners will grow.
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Ethics

- Confronted with an ethical issue
 - half: never
 - a quarter: occasionally
 - One out of ten PR practitioners is unacquainted with the Code of Professional Standards.
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Key Issues for PR Practitioners

The top ten issues, by order of importance:

- Participating in the strategic management of the organizations
 - Recognition of the profession
 - Disseminating information
 - Achieving credibility
 - Producing results, achieving objectives
 - Managing relations between the various audiences in the organizations
 - Improving communications
 - Developing skill sets and improving performance levels
 - Encouraging transparency within the profession
 - Managing perceptions and requirements regarding corporate identity
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Budget Evolution since 2000

- **Organizations** (PR Budget)
 - increasing (43%)
 - status quo (35%)
 - **Firms** (Revenues)
 - increasing for nearly 80% of firms
 - **Self-employed professionals** (Gross fees)
 - increasing for nearly 60% of workers
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B. Detailed Overview of Public Relations in Québec

The current state of public relations in organizations and consulting firms, as well as for self-employed professionals, is similar in many ways to what is described in the general overview. The following data describes the characteristics of each of these three categories:

Profile of Public Relations in Organizations

(public/parapublic sector, companies, NPOs, associations)

- A majority (58.8%) of the PR practitioners surveyed work for companies with 500+ employees.
- Nearly half (46.5%) work in a team of two to five PR professionals, whereas one in four works alone.
- Some 20% of PR executives note that the emergence of new issues and problems is the main reason for the increase in PR budgets.
- About three quarters of PR executives (73.5%) do not expect a staff increase, while 15.3% anticipate an increase.
- According to organization executives, the most useful fields of study for PR practitioners – after Public Relations – are Management, Journalism and Marketing.

Profile of Public Relations in Consulting Firms

(PR agency, PR department of an advertising or other type of agency)

- A great majority (80%) of the consulting firms surveyed are owned by Quebecers.
- One agency in four is mid-sized and has between six (6) and ten (10) employees working full-time on public relations activities.
- A large number of experienced PR practitioners work for consulting firms, with one in three possessing over 20 years experience.
- 30% report an income of over \$116,000.
- More than one third (36.3%) of the PR practitioners who work for consulting firms have a graduate degree such as a *Diplôme d'études supérieures spécialisées* (DESS, or *Specialized Graduate Studies Diploma*), a Master's degree, etc.
- Business seems to be on the rise for a large majority of PR consulting firms: 80% have seen their revenues grow since 2000 and approximately two in three firms expect to see their employee numbers rise by the next fiscal year.
- The fees charged by over half the firms (57.1%) are in the range of \$1 million to \$6 million.
- The fields of study most often mentioned by firm executives as being most useful to PR practitioners — after Public Relations — are (1) Management and Marketing, followed by (2) Journalism and Sociology.

Profile of Self-employed PR Practitioners

- Nearly half (48.4%) possess over 15 years of experience in public relations, and one in five (19.4%) has over 25 years of experience.
- Over one quarter of self-employed practitioners earn more than \$80,000 annually and 16% of them take home over \$116,000.
- At the other end of the scale, some 25% of those self-employed have less than 5 years of experience, and nearly 20% earn less than \$25,000 annually, which may explain the large number of novice PR practitioners working as freelancers while awaiting a permanent full-time position.
- Approximately two thirds (64.3%) have been freelancing for less than five years; their main incentives are the personal challenge the work presents, the need for autonomy and the flexible work hours.
- As for the level of satisfaction, nearly nine out of ten are very satisfied or satisfied with their work; of these, over half (54.8%) say they are 'very' satisfied, which qualifies as a high percentage in this category.
- One in three is Accredited in Public Relations, having completed the certification program and passed the accreditation exams that lead to the APR designation.
- A good number (36.5 %) of self-employed PR practitioners hold a graduate degree such as a DESS, a Master's degree, etc.

C. The Evolution of Public Relations Since 1990

Comparison of four studies conducted between 1990 and 1991

Socio-demographic progress

Three significant points were uncovered:

- The large influx of newly-graduated PR practitioners
- The greater role played by a greater number of women in different PR sectors
- The emergence of a new category of professional with a well-defined profile: self-employed practitioners.
This category did not exist in previous studies (under "others")

Age

- Higher percentage of very young PR practitioners:
15% are under 25 years of age, whereas in 1990 they represented constituted only 1%

Experience

- More professionals with experience:
Nearly one in three have over 15 years of experience compared to one in four in 1990
- More individuals in the early stages of a PR career:
Nearly one in three has less than 5 years of experience compared to one in four in 1990

Job Titles and Professional Status

Job titles:

- The most prevalent: Consultant. Found in all sectors and at all levels, it has increased fourfold (28%) since 1990 (7%).
 - In regression: Agent. Used half as often in 2003 as in 1990, it affects only 7% of PR practitioners
Virtually extinct: less than 1% use the title "*relationniste*", which in 1990 was already waning (5%)
- Professional Status:
- Lower percentage of managers: 42% in 2003 versus 60% in 1990

Professional Responsibilities and Activities

- Their responsibilities have a greater strategic importance.
- They are more confident about the importance of their role.
- Issue and crisis management, government relations and marketing communications have taken a significant precedence over all other priorities.
- Research has increased, even though it remains a low priority: three times as many PR practitioners devote themselves to research on a regular basis.
- The advent of new information technologies: virtually everybody agreed on the positive influence new technology has had on their work.

Position on the organization chart

- Almost two out of three report directly to top management within their organization or consulting firm.
- They work in close collaboration with the highest decision-makers in their firm or organization.
- Many are nevertheless attempting to obtain recognition of the importance of their role from their employers, executive management, colleagues and clients: junior PR professionals most definitely belong to this group.

Ethics and Rules of Professional Conduct

In 2003: 10% are unfamiliar with the Code of Professional Standards

In 1990: 60% are not familiar with the Code of Professional Standards

Progress of Women in Public Relations

Demographic Breakthrough and Career Advancement

(some examples)

- **Demographics**

- In 1990: 10% fewer women than men
- In 2003: 40% more women than men

- **Income**

- In 1990:
 - Men earned much more than women
 - More women were on a lower pay scale
 - Far fewer women than men occupied the higher echelons
- In 2003:
 - Proportionately fewer women than men reported very low incomes
 - Strong presence of women in every other income segment, excluding the “over \$116,000” salary range.

- **Professional Status**

- In 1990:
 - Women outnumbered men in non-management positions.
- In 2003:
 - The number of women in non-management positions versus management positions was proportional to the number of men in those categories (67.5% and 32.5% respectively).

- **Management Positions**

Title	1990		2003	
	F Representativeness 45.0%	M Representativeness 55.0 %	F Representativeness 70.0%	M Representativeness 30.0%
Manager	32.0%	68.0%	69.4%	30.6%
Vice-president	7.7%	92.3%	71.4%	28.6%
President	17.7%	82.3%	40.0%	60.0%

Phase 2

Main Observations of the Three Focus Groups (February 18, 19 and 25, 2004)

The dominant observation emerging from the three focus groups is unquestionably that the profession of public relations has reached a significant level of maturity that it did not have ten years before. Confirming the survey results, PR practitioners explained that this level of achievement is reflected through the extent of their responsibilities, their more strategic role, their access to decision-makers and their overall influence, not to mention their training, which responds more closely to the needs of the profession.

They are eager to take on many different mandates and to seek complex and diverse challenges. Motivated by their responsibilities, they have the impression that they are taking part in the social evolution of their environment by promoting the development of more open relationships between organizations and society in general.

A Plural Reality

The profession of PR practitioner is a plural reality; the practitioners who participated in the focus groups were quick to point out that public relations combines various roles and areas of expertise. They explained that while the role of PR practitioner is more important to decision-makers today than it was ten years ago, it is their role as “consultant” that wields the most influence. However, not all PR professionals are that influential. There are two reasons for this. First, a bond of trust must be established with decision-makers. Second, a significant number of professionals specialize in areas defined as general support for communication strategies: event logistics and producing communication tools fall in this category. In fact, PR professionals can be grouped into either of these equally essential areas of practice: consulting and support.

A Status with Blurred Boundaries

The focus groups also provided PR practitioners with an opportunity to discuss the issues that concerned them most. They often addressed the matter of “profession”, and on several levels. For one, they were very concerned about the use of the title "*relationniste*" in Québec by those whose skills and qualifications are questionable or do not provide sufficient right to claim the status of “professional”. The participants also pointed out that situations of unethical behaviour which surface periodically, involving people claiming to be PR professionals, usually involve individuals who have entered the field on as amateurs, without the proper training or for reasons incompatible with the professional values upheld by dedicated PR practitioners.

The fact that it has become so easy to use the title "*relationniste*" in Québec has increasingly come to haunt the many professionals who have seen the title take on a negative connotation, and who feel that the term is "burned out" and often linked to the "spin doctor" label. Several have even gone so far as to say that they prefer not to refer to themselves as such, preferring to adopt other titles. It is interesting to note that the survey results indicate a major drop in the use of the title "*relationniste*" within the field, with less than 1% of PR practitioners in Québec using this title.

Similarly, the label "image-maker", which is often associated with this profession, evoked strong objections from all focus group participants. In this regard, it is interesting to note that managing a company's image is ranked last among the ten concerns most frequently expressed by PR practitioners when asked an open-ended question as to what they perceive to be the biggest issue when carrying out their duties. This lags far behind the issues of participating in the strategic management of organizations, professional recognition and the credibility of the profession. Similarly, the professionals working in consulting firms declared unanimously, within their focus groups, that the role of PR practitioners is unclear and that it is frequently associated with that of publicists.

Professional Ethics and Credibility

The participants were unanimous with respect to the importance of credibility and ethics. On this point, the shockwave created by the sponsorship scandal, which was making headlines in early 2004, profoundly disturbed all the PR professionals with whom we met.

Without being prompted, all of them spontaneously brought up the issue within their focus groups. This scandal, which has affected the entire communications milieu, is, in their view, a clear demonstration of the need to implement concrete disciplinary measures that could better protect their credibility as PR professionals; this example is used to show the level of importance ethics need to be assigned.

Hence, the participants strongly favour the idea of creating a professional order that would preside over designated areas of PR practice, to protect it from amateurs and incompetents, while promoting a positive image of PR practitioners.

They consider that a professional body would also lend official status to the accreditation process implemented years ago by professional public relations associations as a means of recognizing the levels of skills and quality standards in public relations.

Demographic Changes

With the new contingents of young graduates hitting the labour market each year, the public relations scene is getting progressively younger. Consequently, consulting firms and organizations are having to adapt to this new reality in terms of hiring, training and support capacities .

The three focus groups also confirmed the importance of the role of women in public relations, a point also raised in the survey. Pay equity and professional respect in all aspects relating to the practice of their profession have played a big part for women, who no longer suffer from the discrimination their predecessors faced only 20 or 25 years ago.

The only gap noted by all three groups of participants is also corroborated by the survey data: women are proportionally less represented than men in strategic positions, with men dominating in the upper ranks. However, the extent of this phenomenon is not as marked as it was one or two decades ago.

Also, both the survey and the focus groups brought to light the increase in the number of self-employed public relations practitioners, a trend that has led to the appearance of a new, well-defined category whose characteristics cannot be overlooked in Québec. Aside from the newly graduated young public relations practitioners, who are getting their feet wet in this profession, self-employed professionals represent a category which includes a large number of public relations specialists holding a long track record and appreciable influence among their clients.

Findings

The focus groups also helped pinpoint the contribution public relations practitioners make to strategic planning, an area identified by many in the survey as being either a very important or important part of their work. The responses obtained from each of the focus groups demonstrate that their involvement concentrates mainly on communications and that few of them actually participate in the planning of the organizations' strategic direction.

On another level, and as previously revealed by the survey, communicating risks did not rank as a priority for public relations practitioners; the focus groups did, however, point out that issues surrounding social responsibility have yet to be placed on the agendas of organizations and companies. Nonetheless, public relations practitioners see future opportunities in this respect.

When asked to reflect on the 'local' nature of their practice, as revealed by the survey, the participants explained that they had considerable doubts when it came to practicing abroad. They noted that to be successful, a communication program requires a respect of local cultures and must include specific knowledge of the various audiences, their expectations and their needs. Languages, religions, cultures, work habits, management styles, administrative rules, political regimes: too many unknowns that are difficult to combine with the rules of effective communication they have already mastered. But when their mandates take them abroad, they prefer to create partnerships with public relations firms already established in the countries and milieus that are targeted by their communications so that their input will be properly adapted to the intricacies of foreign contexts.

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Methodology

Survey

The first part of this study used a quantitative method to collect data: an on-line survey comprising fifty-nine (59) closed-ended questions, two open-ended questions and some twenty questions requiring further clarification (“other”). This survey was conducted between October 27 to December 5, 2003. The respondents were members of five of Québec’s professional associations. To carry out this study, a list of approximately 1000 names was compiled, which corresponded to the exhaustive lists of all members of the associations taking part in the study: the *Société des relationnistes du Québec*, the International Association of Business Communicators, the *Forum des responsables des communications du gouvernement du Québec*, the *Association des communicateurs municipaux du Québec*, and the *Alliance des cabinets de relations publiques du Québec*.

This base population was formed exclusively of members in good standing of these associations. The only communication channel used to contact the target population was the members’ e-mail accounts. The exact number of addresses (approximately 1000) cannot be specified, as a certain (though minimal) percentage of these addresses were no longer active. Of these approximately 1000 public relations practitioners, 273 completed the questionnaire and returned it to the researchers by electronic means, representing a response rate of approximately 30%, which takes into account the fact that some public relations practitioners are members of two (or more) associations.

This census-style survey of all members of the five professional associations participating in the study enabled us to obtain a high degree of validity, due to the response rate, which was representative of the public relations practitioners who declared belonging to an association of PR practitioners or professional communicators. However, because the conceptual definition of the term “relationniste” is blurry and not all public relations practitioners are members of these associations, the validity of the study cannot be extended to the entire population of public relations practitioners in Québec. Consequently, the total population of public relations practitioners in Québec cannot be quantified scientifically, even though the membership of the five associations can be quantified precisely, which lends a very satisfactory degree of validity to the survey results.

Focus Groups

Three focus group meetings were held on February 18, 19 and 25, 2004, in order to further assess some of the survey results, thereby providing qualitative data to round out this study. The focus groups were established based on application forms – appended to the online survey - that were received after the survey was completed. The three focus group meetings took place in Montréal in an observation room at UQÀM. Three homogenous groups were created according to their place of work:

- those working in a variety of organizations – companies, government departments, associations, NPOs – other than in public relations firms;
- public relations practitioners working in consulting firms (only PR practitioners working in PR firms participated; those working in the PR departments of advertising agencies or in any other category of consulting firms were not represented); one self-employed practitioner also participated in this group;
- self-employed public relations practitioners.

The interviews were not directed, thus ensuring free and spontaneous discussions while guarding the integrity of the results. The interview structures were similar for the three target groups, and the discussions were recorded with the consent of the participants. In order to guarantee the scientific validity of the results, the interviews continued until the opinions received reached the saturation level. The opinions gathered during these three focus groups enabled us to obtain significant results which corroborated the data collected through the survey.