

About Booz Allen Hamilton

Booz Allen Hamilton has been at the forefront of strategy and technology consulting for 95 years. Every day, government agencies, institutions, corporations, and not-for-profit organizations rely on the firm's expertise and objectivity, and on the combined capabilities and dedication of our exceptional people to find solutions and seize opportunities. We combine a consultant's unique problem-solving orientation with deep technical knowledge and strong execution to help clients achieve success in their most critical missions. Providing a broad range of services in strategy, operations, organization and change, information technology, systems engineering, and program management, Booz Allen is committed to delivering results that endure.

With more than 22,000 people and \$4.5 billion in annual revenue, Booz Allen is continually recognized for its quality work and corporate culture. In 2009, for the fifth consecutive year, *Fortune* magazine named Booz Allen one of "The 100 Best Companies to Work For," and *Working Mother* magazine has ranked the firm among its "100 Best Companies for Working Mothers" annually since 1999.

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What is the Future of Public Relations?



Executive Summary

The public relations industry is continually evolving as the communications landscape becomes increasingly global and technological advancements diffuse, allowing more and more people to participate in the public debate. In October 2009, Booz Allen Hamilton, in collaboration with the Public Relations Society of America (PRSA), conducted a landmark industry-wide survey to capture association members' input on potential future trends in the field. The goal of the survey was to develop a better understanding of what lies ahead as defined by leaders in the public relations community. Reflecting on recent industry changes and acknowledging public relations' present state, more than 2,000 industry members provided input on how they foresee the future state of the industry.

Summary Findings

- Respondents identified the growth of social media as a major future trend. Ninety-five percent reported they plan to use social media on behalf of their client or organization. Nearly half (46 percent) predicted "extremely significant" development and growth of multimedia sharing capabilities found on sites such as YouTube, Flickr, Twitter, and Facebook.
- Managing "ever-expanding channels of communication," budgeting limited monetary resources, and demonstrating return on investment for clients or organizations are anticipated to be the top three challenges in the next 5 years.
- Survey respondents reported strategic communications, social media, and crisis communications as top opportunities for job growth and career success.
- Most respondents agreed that there has been increased democratization in the formulation of public opinion and that the use of two-way communication in the public relations realm has dramatically increased with the advent of social media.
- Findings indicate a future of continual change based on rapid advances in communication technology and more empowered information consumers.

The Future of Public Relations Survey Approach

Methodology

To develop a better understanding of what lies ahead as defined by leaders in the public relations community, Booz Allen Hamilton, in conjunction with PRSA, developed a two-stage approach to accomplish the *Future of Public Relations Survey*.

A preliminary qualitative survey (stage one) was conducted in August 2009 to engage a random sampling of 400 PRSA members and obtain their opinion on challenges, trends, and areas of interest. Forty-five individuals responded (11 percent) and provided the basis for the questions and choices included in the larger quantitative survey.

In October 2009, the second survey was e-mailed to more than 16,000 PRSA members, and more than 2,000 responded (12 percent). Respondents closely matched the demographics of the organization as a whole as seen in the table below.

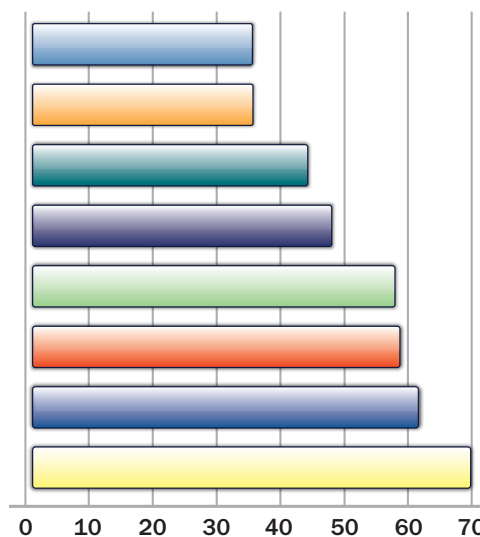
Demographics

	PRSA*	SURVEY RESPONDENTS
Work Environment: Corporate	26%	27%
Professional Role: Management	26%	26%
Gender: Female	71%	70%
Average Years in PR	16	15

*PRSA demographics reference PRSA's 2008 Membership Value Perception and Satisfaction Study, 2008 Member Demographics

Key Challenges

Respondents were asked to what extent they felt specific public relations services on behalf of their client or organization would be a challenge over the next 5 years. Ratings were on a scale of 1–5, with 1 being "not a challenge" and 5 being "a great challenge." The below graphic represents the percentage of respondents that gave a rating of 4 or 5.



- 36% Responding in a timely manner to inquiries in a 24-hour news environment
- 36% Obtaining organization leadership support or content for media efforts
- 44% Maintaining individual privacy in a more connected world
- 49% Brand management in an era with few barriers to mass communication
- 57% Demonstrating return on investment
- 58% Finding the time to engage in online social media communities on a regular basis
- 61% Limited resources due to economic pressures
- 70% Monitoring ever-expanding channels of communication

Findings Suggest Three General Themes

Return on Investment

As our clients' understanding of media and costs rises, it becomes increasingly important to illustrate the value of public relations to management. At the same time, measuring the effectiveness of programs has become more difficult as communications channels become more diffuse and the impact of more traditional media outlets, such as newspapers and network broadcast television, decline.

When asked about the greatest challenges over the next 5 years, among the most widely recognized were "limited resources due to economic pressures" (61 percent) and "demonstrating return on investment" (58 percent). Similarly, two-thirds of respondents saw "measurement and evaluation" as a growth area in the industry over the next 5 years.

"I believe that ROI, while mentioned, is an extremely dangerous issue for our industry. We recently pitched a story that was picked up by 20+ blogs and retweeted numerous times. The client, who is over 60 years old, saw no value whatsoever in this and was very disappointed. We need to find out how to show a value for these kinds of hits, which are becoming more and more important as people begin to pay more attention to online articles/blogs than those that run in print or broadcast media outlets."
—Survey Response

Staying Current

Social media, blogs, and other new sources of media require significant investments of resources to stay actively engaged. These new requirements are in addition to traditional media outreach, employee communications, and other activities that continue to be priorities.

When asked about the greatest challenges over the next 5 years, most highly recognized was "monitoring ever-expanding channels of communication" (70 percent). "Finding the time to engage in online social media communities on a regular basis" (57 percent) was also indicated as a challenge to overcome.

Eighty percent said "monitoring a growing number of news sources" has had a strong or very strong impact on the public relations profession, and 95 percent plan to use social media for their clients in the next 5 years.

"Before it was crucial your clients had a website. Now, it's crucial they have a presence on Twitter, Facebook, and more."
—Survey Response

Identifying and Incorporating What's Next

With the speed of innovation in communications, public relations professionals are challenged to keep up with the technologies that exist today,

as well as to look ahead to the impacts of emerging tools and methodologies.

"Social media tools will continue to change and evolve, we should not get stuck on a particular tool but be flexible and put our strategy to work on the appropriate platform."
—Survey Response

Ninety percent strongly agreed with the following statement: "Over the past 5 years, there has been increased democratization (the ability for the general public to share their point of view)."

More than 1,200 respondents commented on a range of technologies and trends, with many reflecting the idea that "technology is moving too fast for us to determine what the next trend is until it's here."

More than 76 percent agreed or strongly agreed that "public relations has had a dramatic increase in two-way communication with the advent of social media."

Future Opportunities for Job Growth and Career Success

Percentages represent a rating of 4 or 5 on a scale of 1 to 5 (1 being "strongly disagree" and 5 being "strongly agree"). Respondents were asked to what extent they agree each option will be a top opportunity for job growth and career success in public relations over the next 5 years.

