



Impulse Research Corporation
P.O. Box 506
Culver City, CA 90232 - USA

Thomas L. Harris/Impulse Research
2004 Public Relations Client Survey

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BACKGROUND AND METHODOLOGY

This is the 12th annual Thomas L. Harris/Impulse Research Public Relations Client Survey, the largest and most comprehensive survey in the field of public relations.

The total mailing to clients of PR firms this year was to 3,500 communications professionals gathered from the Fortune 500, O'Dwyer's Directory of Communications, other industry sources and lists provided by the participating public relations agencies that sponsor this survey. A total of 1,026 completed survey questionnaires were returned by August 1, a 34% response rate - down from 45% in 2003..

Quality of Performance

Here we deal with the experience of clients working with their own agency, as opposed to the perceptions of non-clients.

All ratings reported here are those of "Outstanding" and "Very Good" combined.

PR firm Performance on Evaluation Criteria

This survey uses 26 dimensions of quality to evaluate a firm's performance. Clients of the firm are asked to rate their firm's performance over the past year on each dimension, as well as overall.

On average, firms were rated 68% on these dimensions of quality, an average decline of 6% from 2003 - following two years of steady improvement.

The data on the following page are averages of the performance of all PR firms rated by clients in the 2004 survey.

Although clients rated their agencies more harshly than in 2003 some areas of performance improved: international capabilities (+32%) and Internet capabilities (+31%), quality of writing (+9%), measures results (+14%) and fast turnaround on deliverables.

The greatest declines in satisfaction with agency performance were in: Meets deadlines, keeps promises (-49%), quality of account team (-48%), full service capabilities (-40%), strategic counsel (-32%), practice areas match our needs (-29%) and quality of management (-28%).

(See table on the following page.)

PR Firm Performance on Evaluation Criteria

(All Firms Combined)

| | <u>2004</u> | <u>2003</u> | <u>2002</u> | <u>2001</u> | <u>Change</u> <u>03 to 04</u> |
|-----------------------------------|--------------------|--------------------|--------------------|--------------------|--|
| Accessibility of account team | 87% | 94% | 88% | 86% | -7% |
| Chemistry | 91% | 90% | 79% | 75% | 1% |
| Client service | 84% | 90% | 79% | 72% | -6% |
| Quality of management | 62% | 90% | 75% | 68% | -28% |
| Quality of my account team | 41% | 89% | 77% | 70% | -48% |
| Involve senior mgmt in my account | 62% | 76% | 70% | 63% | -14% |
| Overall quality of their work | 78% | 90% | 77% | 67% | -12% |
| Honest, accurate billing | 79% | 75% | 62% | 55% | 4% |
| Full service capabilities | 40% | 80% | 70% | 66% | -40% |
| Meets deadlines, keeps promises | 40% | 89% | 73% | 65% | -49% |
| Access to influential people | 82% | 67% | 60% | 59% | 15% |
| Knowledge of my industry | 68% | 70% | 64% | 64% | -2% |
| Strategic counsel | 43% | 75% | 67% | 59% | -32% |
| Practice areas match our needs | 51% | 80% | 66% | 66% | -29% |
| Creativity | 71% | 81% | 55% | 51% | -10% |
| Thorough/attention to detail | 80% | 80% | 65% | 58% | 0% |
| Stability of staff | 68% | 64% | 63% | 59% | 4% |
| Fast turnaround on deliverables | 80% | 74% | 66% | 60% | 6% |
| Quality of writing | 80% | 71% | 60% | 52% | 9% |
| Specialized services we need | 67% | 75% | 55% | 51% | -7% |
| Media placement | 57% | 71% | 47% | 45% | -14% |
| Research capabilities | 61% | 62% | 49% | 44% | 1% |
| Fair and equitable compensation | 65% | 56% | 38% | 37% | 9% |
| Measures results | 76% | 62% | 45% | 35% | 14% |
| International capabilities | 73% | 41% | 41% | 33% | 31% |
| Internet capabilities | 75% | 44% | 33% | 33% | 32% |
| Average | 68% | 74% | 62% | 57% | -6% |

Note: Data shown is the average rating of “outstanding” or “Very Good” among all clients when asked to evaluate the performance of their current firm on each dimension of quality.

PR firm Performance - Continued

In order to assess the importance of each of the evaluation criteria to client satisfaction with their PR firms, we conducted a statistical analysis, which identified the 10 factors that are most correlated with overall client satisfaction with their PR/PA firm.

We call these 10 the “Key Drivers” of client satisfaction because they have the greatest impact on how clients feel about the performance of their agency.

Key Drivers of Client Satisfaction

The table below shows that overall performance on most the 10 key drivers declined in 2004, reversing most of the improvement achieved in 2003.

The exceptions are quality of writing (+9%) and stability of staff (+4%).

Chemistry (+1%) and thorough/attention to detail (+/-0%) were unchanged from the previous year.

The data below is for all firms combined.

| Performance on Key Drivers of Client Satisfaction | | | | | <u>Change</u> |
|--|--------------------|--------------------|--------------------|--------------------|------------------------|
| (All firms combined) | | | | | <u>03 to 04</u> |
| | <u>2004</u> | <u>2003</u> | <u>2002</u> | <u>2001</u> | |
| 1 Chemistry | 91% | 90% | 79% | 75% | 1% |
| 2 Client service | 84% | 90% | 79% | 72% | -6% |
| 3 Quality of management | 62% | 90% | 75% | 68% | -28% |
| 4 Quality of my account team | 41% | 89% | 77% | 70% | -48% |
| 5 Overall quality of their work | 78% | 90% | 77% | 67% | -12% |
| 6 Meets deadlines, keeps promises | 40% | 89% | 73% | 65% | -49% |
| 7 Creativity | 71% | 81% | 55% | 51% | -10% |
| 8 Thorough/attention to detail | 80% | 80% | 65% | 58% | 0% |
| 9 Stability of staff | 68% | 64% | 63% | 59% | 4% |
| 10 Quality of writing | 80% | 71% | 60% | 52% | 9% |
| Average | 69% | 83% | 70% | 64% | -14% |

Note: Data shown is the average rating of “outstanding” or “very good” among all clients when asked to evaluate the performance of their current firm on each dimension of quality.

Satisfaction With Firm - Total

While performance ratings of outstanding increased 2%, indicating that at least some clients continue to be highly satisfied with their agencies, the overall total of clients very satisfied with their firm's performance declined 12%, from 90% in 2003 to 78% in 2004. Ratings of fair or poor rose to 6% from only 1% last year.

An indication of things to come if these trends continue is the 15% decline in the number of clients very committed to their firm – from 80% very committed in 2003 to only 65% in 2004.

The data in the tables below are for all firms combined.

All Firms Combined

| Overall Agency Performance | Change | | | | |
|-----------------------------------|---------------|-------------|-------------|-------------|-----------------|
| | 2004 | 2003 | 2002 | 2001 | 03 to 04 |
| Outstanding | 40% | 38% | 30% | 24% | 2% |
| Very Good | 38% | 52% | 45% | 45% | -14% |
| Good | 16% | 9% | 21% | 23% | 7% |
| Fair | 5% | 1% | 5% | 6% | 4% |
| Poor | 1% | 0% | 0% | 2% | 1% |
| Outstanding or Very Good | 78% | 90% | 74% | 69% | -12% |
| Fair or Poor | 6% | 1% | 5% | 8% | 5% |

Change in Performance vs. Year Ago

| | | | | | |
|-------------------|-----|-----|-----|-----|-----|
| Improved | 32% | 39% | 26% | 22% | -7% |
| Remained the same | 44% | 50% | 50% | 46% | -6% |
| Declined | 9% | 2% | 8% | 10% | 7% |
| Not applicable | 15% | 9% | 17% | 21% | 6% |

Commitment to PR firm

| | | | | | |
|------------------------------|------------|------------|------------|------------|------------|
| Very committed | 65% | 80% | 61% | 48% | -15% |
| Somewhat committed | 25% | 13% | 27% | 33% | 12% |
| Neutral | 8% | 4% | 8% | 12% | 4% |
| Not too committed | 2% | 3% | 4% | 4% | -1% |
| Not at all committed | 1% | 0% | 1% | 4% | 1% |
| Very or Somewhat | 89% | 93% | 88% | 81% | -4% |
| Not too or Not at All | 3% | 3% | 4% | 7% | 0% |

Relationships With Public Relations Firms

Corporate Culture - All Firms Combined

Several positive perceptions of the corporate culture or their PR firms declined this year according to clients surveyed. Agency personnel seem more busy (+24%), less outside the box (-35%), less cutting edge (-21%), less willing to take risks (-31%) and less entrepreneurial (-25%).

Corporate Culture - All Firms Combined

| | <u>2004</u> | <u>2003</u> | <u>2002</u> | <u>2001</u> | <u>Change 03 to 04</u> |
|---------------------|-------------|-------------|-------------|-------------|----------------------------|
| Professional | 85% | 92% | 86% | 81% | -7% |
| Collaborative | 78% | 69% | 70% | 64% | 9% |
| Communicative | 75% | 79% | 68% | 60% | -4% |
| Responsive to needs | 72% | 78% | 74% | 65% | -6% |
| Flexible | 66% | 64% | 58% | 51% | 2% |
| Energetic | 64% | 66% | 55% | 47% | -2% |
| Intelligent | 64% | 77% | 71% | 65% | -13% |
| Confident | 64% | 62% | NA | NA | 2% |
| Warm/friendly | 61% | 80% | 73% | 68% | -19% |
| Stable/dependable | 58% | 53% | NA | NA | 5% |
| Strategic | 54% | 74% | NA | NA | -20% |
| Values quality | 48% | 78% | 58% | 42% | -30% |
| Creative | 46% | 67% | 48% | 39% | -21% |
| Fair | 40% | 62% | 41% | 31% | -22% |
| Mature/seasoned | 37% | 46% | NA | NA | -9% |
| Busy | 33% | 9% | 27% | 23% | 24% |
| Fast paced | 26% | 61% | 41% | 34% | -35% |
| Thought leaders | 23% | 42% | NA | NA | -19% |
| Entrepreneurial | 21% | 46% | 18% | 16% | -25% |
| Challenging | 15% | 11% | 9% | 9% | 4% |
| Outside of the box | 15% | 50% | 15% | 12% | -35% |
| Exciting | 14% | 36% | 18% | 12% | -22% |
| Culturally diverse | 13% | 26% | 13% | 12% | -13% |
| Takes risks | 9% | 40% | 9% | 7% | -31% |
| Political | 9% | 9% | 6% | 6% | 0% |
| Cutting edge | 4% | 25% | 8% | 7% | -21% |
| Irreverent | 2% | 0% | 1% | 2% | 2% |
| Arrogant | 1% | 5% | 3% | 4% | -4% |
| Care free | 1% | 0% | 1% | 1% | 1% |
| Hostile | 1% | 1% | 1% | 1% | 0% |
| Inflexible | 1% | 1% | 1% | 3% | 0% |
| Cold/alooof | 0% | 1% | 1% | 1% | -1% |

Relationship with public relations firms (new)

Most clients surveyed (80%) employ at least one full-service PR firm. Only 6% do all PR work in-house. Usage of agencies increased for 44% of clients, compared with only 21% using outside firms less. 35% reported no change.

Type of agency used

| | |
|---|-----|
| Full service firm | 80% |
| PA firm which specializes in a particular practice area | 17% |
| Regional/local firm | 16% |
| Freelancers | 16% |
| Don't employ firm/freelancers | 6% |

Note: Adds to more than 100% due to multiple responses

Change in use of external PR/PA agencies

| | |
|-----------|-----|
| Increased | 44% |
| Decreased | 21% |
| No change | 35% |

Client areas of responsibility

Clients surveyed in 2004 more are busier this year. In 2004 they more often have responsibility for Business-to-Business PR activities (+4%), Community Relations (+6%) and Crisis Management (+5%). No area of responsibility decreased significantly.

Areas of Responsibility

| | <u>2004</u> | <u>2003</u> | <u>2002</u> | <u>2001</u> | <u>Change</u> |
|--------------------------------|-------------|-------------|-------------|-------------|---------------|
| Business-to-Business | 32% | 28% | 39% | 40% | 4% |
| Community Relations | 45% | 39% | 44% | 40% | 6% |
| Crisis Management | 63% | 58% | 64% | 54% | 5% |
| Financial/Investor Relations | 15% | 19% | 22% | 23% | -4% |
| Internal/Employee Comm's | 46% | 47% | 56% | 47% | -1% |
| Internet/Web Management | 38% | 39% | 42% | NA | -1% |
| Issues Advertising | 21% | 22% | 20% | 23% | -1% |
| Marketing PR | 70% | 69% | 50% | 48% | 1% |
| Media Relations | 77% | 77% | 84% | 80% | -0% |
| Philanthropy | 22% | 20% | NA | NA | 2% |
| Public Affairs/Gov't Relations | 34% | 35% | 36% | 31% | -1% |

Client Budgets

Total Budgets

The average client budget among survey participants was \$3,144,000 on average, up \$897,000 or +28.5% from a year ago.

Internal budgets increased 718,000 (+43%) compared to \$1,666,000 while external budgets increased only \$179,000 (+12%).

Budget Totals

| Internal Budgets | <u>2004</u> | <u>2003</u> | <u>2002</u> | <u>2001</u> | <u>Change</u> |
|--------------------------|--------------------|--------------------|--------------------|--------------------|----------------------|
| Under \$100,000 | 35% | 26% | 22% | 24% | 9% |
| \$100,000 to \$250,000 | 19% | 21% | 19% | 27% | -2% |
| \$250,001 to \$500,000 | 12% | 19% | 18% | 17% | -7% |
| \$500,001 to \$750,000 | 5% | 3% | 7% | 3% | 2% |
| \$750,001 to \$1 million | 6% | 11% | 9% | 9% | -5% |
| \$1 to \$2.5 million | 10% | 10% | 13% | 7% | -0% |
| \$2.5 to \$5 million | 5% | 3% | 8% | 6% | 2% |
| \$5.1 to \$10 million | 3% | NA | NA | NA | NA |
| \$10.1 to \$20 million | 3% | NA | NA | NA | NA |
| \$20.1 to \$30 million | 2% | NA | NA | NA | NA |
| Over \$30 million | 1% | NA | NA | NA | NA |
| Average (000's) | \$1,666 | \$948 | \$952 | \$874 | \$718 |

External Budgets

| | | | | | |
|--------------------------|----------------|----------------|----------------|----------------|--------------|
| Under \$100,000 | 33% | 15% | 17% | 12% | -18% |
| \$100,000 to \$250,000 | 18% | 25% | 22% | 24% | 7% |
| \$250,001 to \$500,000 | 9% | 17% | 16% | 21% | 8% |
| \$500,001 to \$750,000 | 8% | 10% | 7% | 7% | 2 |
| \$750,001 to \$1 million | 5% | 5% | 7% | 11% | -0 |
| \$1 to \$2.5 million | 13% | 14% | 16% | 11% | -1 |
| \$2.5 to \$5 million | 6% | 7% | 8% | 7% | -1% |
| \$5.1 to \$10 million | 3% | NA | NA | NA | NA |
| \$10.1 to \$20 million | 4% | NA | NA | NA | NA |
| \$20.1 to \$30 million | 0% | NA | NA | NA | NA |
| Over \$30 million | 1% | NA | NA | NA | NA |
| Average (000's) | \$1,478 | \$1,299 | \$1,558 | \$1,168 | \$179 |

Total Budget **\$3,144** **\$2,247** **\$2,510** **\$2,042** **\$897**

Note: Categories above \$5 million added in 2004

Note: Based on reported internal and external PR/PA budgets by participating clients.

Client Budgets - By Total Revenues of Firms

The charts below show average internal and external budgets for client firms broken out by their total revenues.

| | Total Revenue | | | | | |
|--------------------------|----------------------------------|------------------------------------|------------------------------------|------------------------------------|-------------------------------------|---------------------------------|
| | <u>Under \$10 million</u> | <u>\$10 to \$99 million</u> | <u>\$100 to \$1 billion</u> | <u>\$1.1 to \$5 billion</u> | <u>\$5.1 to \$10 billion</u> | <u>Over \$10 billion</u> |
| Internal Budgets | | | | | | |
| Under \$100,000 | 65% | 50% | 32% | 28% | 13% | 8% |
| \$100,000 to \$250,000 | 25% | 25% | 14% | 26% | 7% | 10% |
| \$250,001 to \$500,000 | 5% | 17% | 24% | 11% | 5% | 5% |
| \$500,001 to \$750,000 | 3% | 5% | 14% | 10% | 13% | 3% |
| \$750,001 to \$1 million | 2% | 3% | 7% | 10% | 20% | 5% |
| \$1.1 to \$2.5 million | 0% | 0% | 7% | 8% | 27% | 15% |
| \$2.6 to \$5 million | 0% | 0% | 4% | 9% | 7% | 10% |
| \$5.1 to \$10 million | 0% | 0% | 0% | 0% | 0% | 20% |
| \$10.1 to \$20 million | 0% | 0% | 0% | 0% | 7% | 13% |
| \$20.1 to \$30 million | 0% | 0% | 0% | 0% | 2% | 8% |
| Over \$30 million | 0% | 0% | 0% | 0% | 0% | 5% |
| Average (000's) | \$139 | \$198 | \$552 | \$715 | \$1,491 | \$3,014 |
| External Budgets | | | | | | |
| Under \$100,000 | 51% | 46% | 39% | 28% | 6% | 8% |
| \$100,000 to \$250,000 | 24% | 15% | 21% | 13% | 28% | 8% |
| \$250,001 to \$500,000 | 7% | 17% | 12% | 2% | 6% | 8% |
| \$500,001 to \$750,000 | 7% | 12% | 11% | 9% | 6% | 8% |
| \$750,001 to \$1 million | 5% | 2% | 6% | 4% | 10% | 8% |
| \$1.1 to \$2.5 million | 5% | 5% | 8% | 26% | 10% | 9% |
| \$2.6 to \$5 million | 0% | 2% | 2% | 12% | 24% | 12% |
| \$5.1 to \$10 million | 0% | 0% | 2% | 6% | 9% | 14% |
| \$10.1 to \$20 million | 0% | 0% | 0% | 0% | 0% | 13% |
| \$20.1 to \$30 million | 0% | 0% | 0% | 0% | 0% | 9% |
| Over \$30 million | 0% | 0% | 0% | 0% | 0% | 3% |
| Average (000's) | \$277 | \$397 | \$577 | \$1,471 | \$1,911 | \$2,668 |
| Total Budget | \$416 | \$594 | \$1,129 | \$2,186 | \$3,402 | \$5,682 |

Budget Breakdown – Spending by Activity

The tables below show how total PR/PA budgets were allocated for different programs and activities. Corporate media relations (23%) is no longer the largest budget item – surpassed by product media relations (31% up 15%) for the first time.

Community relations spending (23% up 17%) has also increased substantially.

Budget Breakdown - Percent

| | <u>2004</u> | <u>2003</u> | <u>2002</u> | <u>2001</u> | <u>03 to 04</u> <u>Change</u> |
|---------------------------|-------------|-------------|-------------|-------------|----------------------------------|
| Charitable contributions | 4% | 6% | 6% | 5% | -2% |
| Community Relations | 23% | 6% | 7% | 5% | 17% |
| Corporate Media Relations | 7% | 25% | 22% | 26% | -18% |
| Government Relations | 1% | 7% | 5% | 4% | -6% |
| Internal Communications | 6% | 14% | 11% | 8% | -8% |
| Investor Relations | 6% | 7% | 8% | 6% | 1% |
| Issues Advertising | 7% | 3% | 3% | 4% | 4% |
| Product Media Relations | 31% | 16% | 19% | 23% | 15% |
| Public Affairs | 3% | 7% | 7% | 5% | -4% |
| Research | 3% | 3% | 4% | 5% | 0% |
| Special events | 7% | 7% | 8% | 9% | 0% |

Budget Breakdown - Dollars

| | <u>2004</u> | <u>2003</u> | <u>2002</u> | <u>2001</u> | <u>03 to 04</u> <u>Change</u> |
|---------------------------|----------------|----------------|----------------|----------------|----------------------------------|
| Charitable contributions | \$128 | \$132 | \$163 | \$113 | \$(4) |
| Community Relations | \$736 | \$129 | \$191 | \$113 | \$607 |
| Corporate Media Relations | \$217 | \$561 | \$601 | \$585 | \$(344) |
| Government Relations | \$45 | \$153 | \$137 | \$90 | \$(108) |
| Internal Communications | \$179 | \$309 | \$293 | \$180 | \$(130) |
| Investor Relations | \$200 | \$148 | \$211 | \$135 | \$ 52 |
| Issues Advertising | \$224 | \$62 | \$85 | \$90 | \$162 |
| Product Media Relations | \$975 | \$363 | \$517 | \$518 | \$612 |
| Public Affairs | \$105 | \$162 | \$186 | \$113 | \$(57) |
| Research | \$100 | \$62 | \$115 | \$113 | \$378 |
| Special events | \$227 | \$167 | \$231 | \$203 | \$60 |
| Total (\$000's) | \$3,144 | \$2,176 | \$2,510 | \$2,042 | \$968 |

Note: Based on reported internal and external PR/PA budgets by participating clients.

Revenues and Budgets by Industry

| | Average revenues | <u>Revenues of your organization</u> | | | | | |
|------------------------|----------------------|--------------------------------------|----------------------------|-------------------------|-------------------------|-----------------------------|----------------------|
| | | Under \$10 million | \$10 to \$99 million | \$100 to \$1 billion | \$1.1 to \$5 billion | \$5.1 to \$10 billion | Over \$10 billion |
| Health & Medical Servi | 18% \$ 2,347 | 19% | 12% | 28% | 26% | 2% | 14% |
| Consumer Products | 11% \$ 3,204 | 4% | 27% | 23% | 19% | 4% | 23% |
| Other - write-in below | 9% \$ 2,025 | 30% | 26% | 17% | 9% | 0 | 17% |
| Banking & Finance | 8% \$ 5,141 | 11% | 11% | 17% | 6% | 28% | 28% |
| Computer/Technology | 7% \$ 1,838 | 12% | 24% | 35% | 18% | 0 | 12% |
| Government | 7% \$ 2,033 | 19% | 25% | 19% | 25% | 0 | 13% |
| Telecommunications | 7% \$ 5,193 | 13% | 25% | 6% | 6% | 0% | 50% |
| Food & Beverage | 6% \$ 4,229 | 7% | 7% | 20% | 33% | 0 | 33% |
| Manufacturing | 6% \$ 3,425 | 0 | 0 | 20% | 60% | 7% | 13% |
| Transportation | 5% \$ 5,041 | 18% | 0 | 18% | 9% | 27% | 27% |
| Education & Training | 4% \$ 1,117 | 40% | 30% | 20% | 0 | 0 | 10% |
| Agribusiness | 4% \$ 1,438 | 44% | 11% | 11% | 22% | 11% | 0 |
| Information Technology | 3% \$ 2,738 | 13% | 25% | 25% | 13% | 13% | 13% |
| Energy | 3% \$ 6,620 | 0 | 0 | 29% | 0 | 29% | 43% |
| Retailing | 3% \$ 6,195 | 0 | 0 | 29% | 14% | 0 | 57% |
| Total | 100% \$ 3,129 | 14% | 17% | 24% | 19% | 7% | 20% |

| | Average revenues | <u>Internal External</u> | | |
|-------------------------|----------------------|--------------------------|-----------------|-----------------|
| | | <u>PR</u> | <u>PR</u> | <u>Total PR</u> |
| | <u>program</u> | <u>program</u> | <u>Program</u> | |
| | <u>budget</u> | <u>budget</u> | <u>Budget</u> | |
| | \$billions | \$millions | \$millions | |
| Health & Medical Servic | 18% \$ 2,347 | \$ 2,541 | \$ 2,717 | \$ 5,258 |
| Consumer Products | 11% \$ 3,204 | \$ 407 | \$ 1,953 | \$ 2,359 |
| Banking & Finance | 8% \$ 5,141 | \$ 1,031 | \$ 819 | \$ 1,850 |
| Computer/Technology | 7% \$ 1,838 | \$ 1,113 | \$ 763 | \$ 1,875 |
| Government | 7% \$ 2,033 | \$ 444 | \$ 1,237 | \$ 1,681 |
| Telecommunications | 7% \$ 5,193 | \$ 578 | \$ 293 | \$ 871 |
| Food & Beverage | 6% \$ 4,229 | \$ 1,107 | \$ 3,546 | \$ 4,653 |
| Manufacturing | 6% \$ 3,425 | \$ 1,700 | \$ 1,585 | \$ 3,285 |
| Transportation | 5% \$ 5,041 | \$ 2,465 | \$ 1,990 | \$ 4,455 |
| Education & Training | 4% \$ 1,117 | \$ 2,927 | \$ 3,680 | \$ 6,607 |
| Agribusiness | 4% \$ 1,438 | \$ 699 | \$ 873 | \$ 1,572 |
| Information Technology | 3% \$ 2,738 | \$ 1,069 | \$ 281 | \$ 1,350 |
| Energy | 3% \$ 6,620 | \$ 3,557 | \$ 1,695 | \$ 5,251 |
| Retailing | 3% \$ 6,195 | \$ 1,110 | \$ 610 | \$ 1,720 |
| Other | 9% \$ 2,025 | \$ 1,052 | \$ 792 | \$ 1,844 |
| Total | 100% \$ 3,129 | \$1,666 | \$ 1,478 | \$ 3,144 |

Background Information About Respondents

Title and Position

| Title | <u>2004</u> | <u>2003</u> | <u>2002</u> | <u>2001</u> | <u>Change</u> |
|--------------------------|--------------------|--------------------|--------------------|--------------------|----------------------|
| Manager | 19% | 22% | 23% | 27% | -3% |
| Director | 33% | 34% | 39% | 34% | -1% |
| Vice President | 18% | 22% | 19% | 20% | -4% |
| Sr. Vice President | 8% | 10% | 8% | 5% | -2% |
| Executive Vice President | 5% | 3% | 2% | 3% | 2% |
| President/CEO | 9% | 5% | 5% | 6% | 4% |
| Other | 9% | 5% | 4% | 6% | 4% |

| Position | <u>2004</u> | <u>2003</u> | <u>2002</u> | <u>2001</u> | <u>Change</u> |
|--------------------------------|--------------------|--------------------|--------------------|--------------------|----------------------|
| Brand management | 2% | 1% | NA | NA | 1% |
| Corp. Comm./Public Relations | 45% | 55% | 53% | 48% | -10% |
| Corporate management | 11% | 6% | 8% | 7% | 5% |
| Investor relations | 1% | 2% | 3% | 6% | -1% |
| Marketing/Mktg. Communications | 24% | 18% | 21% | 28% | 6% |
| Public affairs | 5% | 7% | 8% | 10% | -2% |
| Other | 8% | 10% | 7% | 2% | -2% |

Client Organization

| | <u>2004</u> | <u>2003</u> | <u>2002</u> | <u>2001</u> | <u>Change</u> |
|-------------------------------|--------------------|--------------------|--------------------|--------------------|----------------------|
| Charitable organization | 4% | 4% | 5% | 4% | -0% |
| Educational institution | 3% | 2% | 1% | 2% | 1% |
| Gov't agency/dept | 7% | 4% | 3% | 5% | 3% |
| Non governmental organization | 3% | 3% | NA | NA | -0% |
| Private corporation | 34% | 27% | 28% | 35% | 7% |
| Public corporation | 45% | 55% | 56% | 48% | -10% |
| Trade association | 5% | 5% | 8% | 6% | 0% |

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