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ICCO WORLD PR REPORT 2020-2021

AGENCY VIEWS OF THE PATH AHEAD

PRovoke

Global PR Agency Rankings 2020

07 Op Opinium

#worldprreport

THE INTERNATIONAL COMMUNICATIONS CONSULTANCY ORGANISATION (ICCO)

The International Communications Consultancy Organisation (ICCO) is the global voice of the public relations and communications industry. Through our network of 41 associations, representing PR and communications agencies in 70 countries, ICCO members strive to shape the future of communications by improving professional standards and tackling collective issues collaboratively.

Engage with ICCO to forge international partnerships and join a global network of communications agencies.

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ICCO
INTERNATIONAL COMMUNICATIONS CONSULTANCY ORGANISATION

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INTERNATIONAL MATCHMAKING AND PARTNER DEVELOPMENT

KNOWLEDGE EXCHANGE AND COLLABORATIVE CAMPAIGNS

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FACING THE FUTURE WITH CONFIDENCE

Francis Ingham
CHIEF EXECUTIVE, ICCO

In last year's World Report, I ended my summary with this paragraph:

"Finally, there are most certainly plenty of challenges lying ahead of our industry. And they all need to be accepted. But greater than the challenges are the opportunities. And our industry faces both the challenges and the opportunities from a position of enormous and growing strength."

A year on, it is fair to say that none of us realised the epic scale of those future challenges. But while 2020 has created a multitude of things we would all rather have avoided, it has also created one positive for our industry: it has shown the power and the purpose of PR. It has proved the centrality of our advice to Governments, organisations, and individuals. And in my view, it has also proved quite how strong are the foundations on which our industry stands.

What are the key findings of this, the definitive annual analysis of the size, shape and future direction of our industry, pulled together via responses from ICCO's 41 Associations, and 3,000 agency heads, operating in 70 countries?

Covid has unquestionably taken its toll. Profitability is down. Income is down. A myriad of contracts have been cancelled or put on hold. And as we all know, many people have lost their jobs. But in every single region of the world, agency heads look forward to 2021 with confidence, predicting growth once more. And quite honestly -and quite sadly- how many other industries can say the same?

Happily, there are positive stories even in terrible times.

CEOs are paying more attention than ever to their corporate reputation. 2020 has turned a vicious -sometimes blinding, sometimes illuminating- spotlight on how organisations have acted. Has it been with nuance and empathy? Has it been with the callous chasing of every last penny, and every last cent? Have companies been authentic? Or have they been fake? Have CEOs led? Or have CEOs hidden?

All of which means that 2020 will provide the case studies of a whole decade. When people ask 'What's the point of PR?' we will suggest that they look at the good and the bad of this period.

There is also a clear shift away from the tactical and towards the strategic, while the value of crisis counsel has never been more apparent.

And, of course, the prominence and salience of digital skill has never been higher. Every region says that they are handling clients' digital needs well, and are delivering an ever-broader array of services. Content creation and influencer marketing are in the ascendancy. Our industry has never had as many places at that fabled top table.

All of these trends have been discernible in previous years. All have been turbocharged by this crisis.

And the investment in digital that this report reveals shows that our industry is putting its money where its future is. When we get through to the other side of this pandemic, PR's medium-term prospects are remarkably bright.

In terms of growth sectors, it is no surprise that IT, tech, and healthcare lead the way. Nor that the not-for-profit and retail sectors are to be found somewhat further down the growth hierarchy. But even here, a substantial number of agency heads expect sectoral growth.

Despite how tough these times are, talent remains a huge challenge. A challenge that is particularly acute in recruiting the people with the skills that we need -with data, measurement, and analytics at the top of the pile here. As our industry recovers, this challenge will intensify obviously.

There are four final issues that we need to highlight and to address.

First, workforce diversity is an increasingly pressing issue in many regions of the world, but most especially in North America and the UK, where the industry comes nowhere close to reflecting the society with which it engages.

Encouragingly though, those two regions also lead the way in employers having a diversity and inclusion policy -a positive sign of progress. The next phase must focus intently on enacting meaningful change on representation and inclusion.

Secondly, mental health has now become a key issue for almost all of us. The agency heads I speak with are often burned out. Overwhelmed with the scale and the length of the critical challenges with which they are wrestling. And this sense of exhaustion permeates the industry at every stratum. But it is encouraging to see our industry rapidly becoming more comfortable with discussing these issues, and more proactive in offering support to those who need it.

Thirdly. Progress continues to be made on making sophisticated, meaningful evaluation the norm. The use of dinosaur AVEs continues to decline. The use of AMEC tools has grown remarkably over the past twelve months under the leadership of AMEC's Johna Burke and Richard Bagnall. This is excellent news for our industry.

Finally, as the GWPR data show, we have a great deal more to do on the gender pay gap, and on industry leadership. Put simply, when two out of three practitioners in a profession are women, it is indefensible that two out of three at the top of the pyramid are men.

To conclude

This is a memorable year -for all of the wrong reasons. A year of retrenchment; reconfiguration; reaction to challenges of incredible ferocity. Many people I speak with say this- they can't wait for 2020 to be over. It's the longest year in history.

And yet, 2020 has proved that the fundamentals of our industry are incredibly resilient. That we can change course with remarkable speed. That every crisis brings fresh opportunities -you just need to weather the storm in order to embrace them.

All of which leads me to a final observation. I am confident that next year's World Report will look back on enormous challenges overcome. And on bold changes made. Will record that if 2020 was a year of survival and change, then 2021 was a year of unparalleled growth. And will conclude quite frankly -and with a collective sigh of relief- at a crisis faced successfully.

OPINIUM SUMMARY

A PROMISING OUTLOOK DESPITE GLOBAL CHALLENGES BEING FACED

James Endersby

CEO, OPINIUM

We are delighted to partner with ICCO on the World PR Report for the second year in a row – a vital tool filled with insights for PR leaders who are conscious of the challenges ahead and are strategically working to overcome these by positioning themselves as a value asset.

The coronavirus pandemic has impacted almost all aspects of life as we knew it, and the PR industry has faced their share of challenges. Whilst many PR agencies have experienced delayed or cancelled campaigns (62%) and a loss of earning (46%), encouragingly, many PR professionals also see a brighter outlook for the future. Many remain optimistic about the growth of the public relations market, which is mostly expected to come from the technology (63%) and healthcare sectors (53%).

Furthermore, there is more positivity to be found from this report.

In our ever more conscious world and with the social, environmental, and global issues we have faced in 2020, it is no surprise that PR professionals are seeing an uplift in corporate CEO's paying more attention to corporate purpose. This is reflected in that the area which saw the most growth in the last 12 months has been Corporate Reputation (41%).

Issues being addressed are such things as Sustainability and Climate Change (56%), Diversity and Inclusion (46%) and Healthcare (33%). Whilst these issues are not just being addressed by PR clients, the PR industry has also been internally responding to such issues. Globally 60% of PR professionals work for a company which has a Diversity and Inclusion policy, with North America (77%) and the UK (77%) being the most likely to have adopted such a policy. The report further highlights how PR firms are recognising the importance of employee wellbeing. We can see half have put a formal support structure in place to support wellbeing (52%), with North America (77%) followed by Asia Pacific (70%) leading the way.

As these challenging times continue, I am sure the positive outlook of the PR industry shown in this report will only result in more resilience and progress.

07 Op Opinium

OPINIUM is an award winning strategic insight agency built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on pulse of what people think, feel and do. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and overcome strategic challenges – helping them to get to grips with the world in which their brands operate. We use the right approach and methodology to deliver robust insights, strategic counsel and targeted recommendations that generate change and positive outcomes.

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PROVOKE TOP 250 RANKINGS

2020 RANK	2019 RANK	AGENCY	HQ	FEE INCOME 2019 ($)	FEE INCOME 2018 ($)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
1	1	Edelman	USA	892,039,000	888,405,000	5,703	0.4%	0.4%
2	2	Weber Shandwick	USA	865,000,000	840,000,000		3.0%	3.0%
3	3	BCW	USA	740,000,000	723,000,000		2.4%	2.4%
4	4	FleishmanHillard	USA	605,000,000	605,000,000		0.0%	0.0%
5	5	Ketchum	USA	535,000,000	545,000,000		-1.8%	-1.8%
6	6	MSL	France	450,000,000	450,000,000	2,271	0.0%	0.0%
7	7	Hill+Knowlton Strategies	USA	360,000,000	400,000,000		-10.0%	-10.0%
8	8	Ogilvy	USA	345,000,000	355,000,000		-2.8%	-2.8%
9	9	BlueFocus	China	329,123,818	336,372,995		-2.2%	-1.5%
10	10	Brunswick	UK	324,000,000	280,000,000	1,200	15.7%	15.7%
11	12	MC Group	Germany	274,618,124	235,047,605	1,238	16.8%	16.8%
12	11	Golin	USA	252,000,000	245,000,000		2.9%	2.9%
13	13	FTI Consulting	USA	243,000,000	223,331,000	728	8.8%	8.8%
14	14	Havas PR Global Collective	France	225,000,000	220,000,000	1,350	2.3%	2.3%
15	16	W2O Group	USA	222,000,000	177,500,000	926	25.1%	25.1%
16	15	Vector Inc.	Japan	219,500,000	187,300,000	984	17.2%	17.2%
17	17	ICF Next	USA	170,041,953	157,823,000	950	7.7%	7.7%
18	20	Sunny Side Up Inc	Japan	148,009,233	125,869,503	376	17.6%	17.6%
19	19	Teneo Holdings	UK	145,000,000	130,000,000		11.5%	11.5%
20	21	WE Communications	USA	143,500,000	126,600,000	1,172	13.3%	13.3%
21	18	APCO Worldwide	USA	142,262,200	134,136,700	786	6.1%	6.1%
22	22	Finsbury	USA	130,000,000	125,000,000	250	4.0%	4.0%
23	25	Finn Partners	USA	119,321,160	88,114,000	777	35.4%	35.4%
24	26	Syneos Health	USA	110,000,000	100,000,000	350	10.0%	10.0%
24	23	Porter Novelli	USA	110,000,000	120,000,000		-8.3%	-8.3%
26	35	FischerAppelt	Germany	92,624,000	66,690,000	714	38.9%	41.4%
27	30	ICR	USA	88,000,000	70,000,000	225	25.7%	25.7%
28	32	Allison+Partners	USA	80,800,000	68,000,000	489	18.8%	18.8%
29	34	GCI Health	USA	80,000,000	67,000,000	300	19.4%	19.4%
30	53	SEC Newgate	Italy	79,501,533	34,289,214	601	131.9%	131.9%
31	28	Zeno Group	USA	79,269,860	73,373,239	489	8.0%	8.0%
32	36	Hopscotch Group	France	78,736,000	62,472,000	750	26.0%	28.3%
33	29	Ruder Finn	USA	78,000,000	70,500,000	702	10.6%	10.6%
34	30	Marina Maher Communications	USA	77,000,000	70,000,000	213	10.0%	10.0%
35	41	Freuds	UK	68,603,461	55,010,000	245	24.7%	20.9%
36	33	FSB Comunicacoes	Brazil	63,927,129	67,860,000	639	-5.8%	-2.0%
37	38	SKD Knickerbocker	USA	62,000,000	60,000,000	115	3.3%	3.3%
38	42	Rogers & Cowan/PMK*BNC	USA	60,000,000	53,000,000	350	13.2%	13.2%
38	27	Archetype	USA	60,000,000	74,000,000	605	-18.9%	-18.9%
40	44	Prosek Partners	USA	58,200,000	50,346,047	195	15.6%	15.6%
41	40	Lewis	UK	56,760,000	55,296,000	370	2.6%	-0.5%
42	37	Hering Schuppener	Germany	55,664,000	54,150,000	199	2.8%	4.6%
43	42	DKC Public Relations	USA	55,000,000	53,000,000	250	3.8%	3.8%
44	39	H&H Group	Sweden	52,000,000	55,550,000	410	-6.4%	-6.4%
45	48	Kyodo Public Relations	Japan	51,813,000	47,853,000	250	8.3%	8.3%
46	47	Grayling	UK	50,688,000	49,024,000		3.4%	0.3%
47	45	Joele Frank	USA	50,000,000	50,000,000	120	n/a	n/a
48	49	LLYC	Spain	48,221,000	45,327,150	610	6.4%	6.4%
49	46	Instinctif Partners	UK	46,200,000	49,920,000	320	-7.5%	-10.3%
50	50	Dentsu Public Relations	Japan	46,000,000	45,000,000	292	2.2%	2.2%

PROVOKE TOP 250 RANKINGS

PRovoke

2020 RANK	2019 RANK	AGENCY	HQ	FEE INCOME 2019 ($)	FEE INCOME 2018 ($)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
51	54	Four Communications Group	UK	45,003,095	40,914,150	345	10.0%	6.7%
52	n/a	SJR	USA	45,000,000	0	180	n/a	n/a
52	57	Portland Communications	UK	45,000,000	42,000,000	235	7.1%	7.1%
54	56	M Booth	USA	43,966,721	39,769,636	194	10.6%	10.6%
55	52	MWWPR	USA	42,741,686	42,584,020	178	0.4%	0.4%
56	51	Kreab	UK/Sweden	42,560,000	43,320,000	400	-1.8%	0.0%
57	59	Hotwire	UK	42,161,713	36,879,576	280	14.3%	14.3%
58	n/a	National PR	Canada	42,000,000	n/a			
59	62	Grupo Inpress	Brazil	39,621,750	36,123,360	584	9.7%	14.1%
60	n/a	Padilla	USA	37,327,206	41,233,936	194	-9.5%	-9.5%
61	65	The Outcast Agency	USA	36,700,000	35,000,000		4.9%	4.9%
62	64	5W Public Relations	USA	36,351,814	35,251,222	158	3.1%	3.1%
63	70	Prain Global	Korea	36,210,555	30,696,234	224	18.0%	18.0%
64	60	Carmichael Lynch Relate	USA	36,000,000	36,000,000		0.0%	0.0%
64	55	PRAP Japan	Japan	36,000,000	40,000,000	283	-10.0%	-10.0%
66	67	Adfactors PR	India	35,637,572	33,810,000	750	5.4%	5.4%
67	63	CYTS-LINKAGE	China	35,480,000	35,580,815	300	-0.3%	-0.3%
68	60	DeVries Global	USA	35,000,000	36,000,000	207	-2.8%	-2.8%
69	80	Engine MHP + Mischief	UK	34,848,000	31,232,000	195	11.6%	8.2%
70	66	Global Strategy Group	USA	34,000,000	34,000,000	100	0.0%	0.0%
71	69	Spectrum Science	USA	33,900,000	32,900,000	116	3.0%	3.0%
72	91	Imre	USA	33,333,949	21,940,000	158	51.9%	51.9%
73	84	Kivvit	USA	33,049,315	24,205,190	88	36.5%	36.5%
74	n/a	Citizen Relations	US	32,577,578	32,088,046	206	1.5%	1.5%
75	75	French/West/Vaughan	USA	32,509,302	29,280,490	113	11.0%	11.0%
76	77	Serviceplan PR Group	Germany	32,121,600	27,451,200	214	17.0%	19.1%
77	72	Coyne PR	USA	32,000,000	30,000,000	150	6.7%	6.7%
78	n/a	Attention	Germany	31,158,400	21,796,800	174	42.9%	45.5%
79	92	achtung!	Germany	30,828,000	21,801,360	158	41.4%	43.9%
80	71	G&S Business Communications	USA	30,733,412	30,480,000	179	0.8%	0.8%
81	73	Farner Consulting	Switzerland	29,685,283	29,769,083	145	-0.3%	1.5%
82	74	Fahlgren Mortine	USA	29,504,384	29,632,896	193	-0.4%	-0.4%
83	76	Citigate Dewe Rogerson	UK	29,040,000	28,032,000		3.6%	0.5%
84	85	Hanover	UK	26,897,785	24,001,576	172	12.1%	8.7%
85	79	ATREVIA	Spain	26,572,159	26,416,098	398	0.6%	2.4%
86	86	Rud Pedersen	Sweden	25,816,649	23,603,800	165	9.4%	9.4%
87	90	Havas Formula	USA	25,630,379	22,324,063	130	14.8%	14.8%
88	98	Gullers Grupp	Sweden	25,355,550	20,185,770	186	25.6%	25.6%
89	155	Evoke Kyne	Ireland	25,149,453	22,400,000	107	12.3%	12.3%
90	107	Casbah Group	UK	24,881,884	24,236,193	206	2.7%	-0.4%
91	81	Jackson Spalding	USA	24,851,907	25,300,426	149	-1.8%	-1.8%
92	99	Crosby	USA	24,534,990	20,111,007	85	22.0%	22.0%
93	82	Strategic Public Relations Group	Hong Kong	24,530,000	24,800,000	264	-1.1%	-1.1%
94	86	Hunter Public Relations	USA	24,300,000	24,000,000	121	1.3%	1.3%
95	89	M&C Saatchi Sport & Entertainment	UK	23,892,000	23,040,000	200	3.7%	0.6%
96	n/a	Premier	UK	23,628,000	23,808,000	140	-0.8%	-3.8%
97	93	PR One	South Korea	22,577,855	21,057,348	170	7.2%	7.2%
98	96	Faktor 3	Germany	22,551,200	20,748,000	221	8.7%	10.6%
99	100	PAN Communications	USA	22,493,586	19,893,729	148	13.1%	13.1%
100	88	Sopexa	France	22,400,000	23,798,640	211	-5.9%	-4.2%

PRovoke

PR Agency Rankings 2020

PROVOKE TOP 250 RANKINGS

2020 RANK	2019 RANK	AGENCY	HQ	FEE INCOME 2019 ($)	FEE INCOME 2018 ($)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
101	120	Day One Agency	USA	21,410,269	14,751,905	93	45.1%	45.1%
102	110	Praytell	USA	21,200,000	16,500,000	133	28.5%	28.5%
103	103	Brands2Life	UK	21,118,900	19,128,191	133	10.4%	10.4%
104	128	Current Global	USA	20,500,000	13,747,500	200	49.1%	49.1%
105	106	InkHouse	USA	20,400,000	17,500,000	118	16.6%	16.6%
106	97	Barabino & Partners	Italy	20,384,000	20,200,800	105	0.9%	2.7%
107	94	Taylor	USA	20,200,000	20,900,000	90	-3.3%	-3.3%
108	119	Walker Sands	USA	19,982,208	14,886,412	138	34.2%	34.2%
109	101	Geelmuyden.Kiese Group	Norway	19,720,000	19,727,866	155	0.0%	0.0%
110	105	Highwire	USA	19,595,186	17,901,420	82	9.5%	9.5%
111	117	Mikhailov & Partners	Russia	19,132,172	15,407,143	192	24.2%	8.7%
112	102	LaunchSquad	USA	18,602,375	19,284,304	117	-3.5%	-3.5%
113	115	V+O	Greece	18,485,600	16,044,930	169	15.2%	17.3%
114	95	Racepoint Global	USA	18,333,000	20,876,000	85	-12.2%	-12.2%
115	n/a	Precision Strategies	USA	18,057,133	14,843,111	67	21.7%	21.7%
116	123	Headland Consultancy	UK	17,859,320	14,116,294	95	26.5%	22.7%
117	104	Levick Strategic Communications	USA	17,000,000	18,000,000	70	-5.6%	-5.6%
118	109	The Red Consultancy	UK	16,896,000	16,768,000	140	0.8%	-2.3%
119	122	Mission North	USA	16,800,000	14,499,420	70	15.9%	15.9%
120	n/a	M Booth Health	United States	16,582,440	n/a	50	#VALUE!	#VALUE!
121	125	rbb Communications	USA	16,051,825	14,054,774	80	14.2%	14.2%
122	127	Lansons	UK	16,025,125	13,867,206	110	15.6%	12.1%
123	118	Proof	Canada	16,008,088	15,111,535	122	5.9%	5.9%
124	112	Mazarine Asia Pacific	Hong Kong	16,000,000	16,384,000	58	-2.3%	-2.3%
124	111	DNA Communications	USA	16,000,000	16,400,000	100	-2.4%	-2.4%
126	95	SHIFT Communications	USA	15,884,974	17,508,661	91	-9.3%	-9.3%
127	116	Pegasus	UK	15,444,000	15,675,875	120	-1.5%	-4.5%
128	113	TRACCS	Saudi Arabia	15,400,000	16,054,000	200	-4.1%	-4.1%
129	78	Interel	Belgium	15,060,640	14,481,420	113	4.0%	5.9%
130	129	The Hoffman Agency	USA	15,000,000	13,742,000	185	9.2%	9.2%
131	208	ORCA Agenturgruppe	Germany	14,784,000	6,942,600	95	112.9%	116.7%
132	124	Maitland	UK	14,520,000	14,080,000	53	3.1%	0.0%
133	168	W	UK	14,185,800	9,600,000	92	47.8%	47.8%
134	114	Mitchell	USA	14,153,546	15,085,700		-6.2%	-6.2%
135	126	Spark	USA	14,000,000	14,000,000	60	0.0%	0.0%
135	n/a	Axon Communications	UK	14,000,000	14,000,000	75	0.0%	0.0%
137	142	Method Communications	USA	13,498,800	11,935,285	66	13.1%	13.1%
138	134	Wellcom	France	13,440,000	12,540,000	120	7.2%	9.1%
139	164	JeffreyGroup	USA	13,310,186	9,975,712	232	33.4%	33.4%
140	150	Bliss Integrated Communications	USA	13,250,000	11,000,000	57	20.5%	20.5%
141	133	Powerscourt	UK	13,200,000	12,672,000	53	4.2%	1.0%
142	n/a	LaForce	United States	13,064,376	11,892,563	85	9.9%	9.9%
143	132	Exponent PR	USA	13,000,000	13,200,000	55	-1.5%	-1.5%
144	131	Faktenkontor	Germany	12,992,000	13,224,000	100	-1.8%	0.0%
145	328	Apple Tree Communications	Spain	12,976,320	12,234,480	115	6.1%	8.0%
146	143	Jarrard Phillips Cate & Hancock	USA	12,416,807	11,591,239	43	7.1%	7.1%
147	135	KPR & Associates	South Korea	12,390,004	12,218,982	108	1.4%	1.4%
148	121	Haebmau	Germany	12,320,000	14,706,000	145	-16.2%	-14.7%
149	n/a	Marathon Strategies	USA	12,198,838	10,771,727	46	13.2%	13.2%
150	137	RF|Binder	USA	12,000,000	12,000,000	55	0.0%	0.0%

PROVOKE TOP 250 RANKINGS

2020 RANK	2019 RANK	AGENCY	HQ	FEE INCOME 2019 ($)	FEE INCOME 2018 ($)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
151	167	First House	Norway	11,873,120	7,410,000	35	60.2%	63.1%
152	150	Davies	USA	11,730,000	11,000,000	35	6.6%	6.6%
153	148	Mower	United States	11,655,290	11,100,000	42	5.0%	5.0%
154	179	Hope&Glory	UK	11,616,774	8,990,755	80	29.2%	25.3%
155	157	Citypress	UK	11,401,041	10,565,760	90	7.9%	4.6%
156	161	Gregory FCA	USA	11,400,000	10,000,000	77	14.0%	14.0%
157	144	F&H Communications	Germany	11,312,000	11,514,000	60	-1.8%	0.0%
158	145	Marco	Spain	11,144,796	10,191,247	120	9.4%	11.3%
159	147	C+C	USA	11,055,642	11,153,672	66	-0.9%	-0.9%
160	161	DCI	USA	11,000,000	10,000,000	58	10.0%	10.0%
160	159	Murphy O'Brien	USA	11,000,000	10,170,481	50	8.2%	8.2%
160	148	Diplomat Group	Sweden	11,000,000	11,000,000	110	0.0%	0.0%
160	150	Kwittken	USA	11,000,000	11,000,000	70	0.0%	0.0%
164	173	MMGY NJF	USA	10,949,994	9,376,703	63	16.8%	16.8%
165	185	90TEN	UK	10,912,188	8,448,227	72	29.2%	25.3%
166	130	CROS	Russia	10,810,090	13,458,180	139	-19.7%	-19.7%
167	153	Lift World	Portugal	10,594,715	10,777,045	114	-1.7%	0.1%
168	171	Argyle	Canada	10,582,591	9,491,736	92	11.5%	11.5%
169	160	Lambert	USA	10,570,000	10,055,000	56	5.1%	5.1%
170	157	Good Relations	UK	10,560,000	10,240,000	75	3.1%	0.0%
171	161	GoodIdea Media	China	10,500,000	10,000,000	100	5.0%	5.0%
171	146	Action Global Communications	Cyprus	10,500,000	11,275,766	185	-6.9%	-6.9%
171	165	Veritas	Canada	10,500,000	10,500,000	72	0.0%	0.0%
174	191	JIN	France	10,416,000	8,892,000	75	17.1%	19.2%
175	154	Makovsky	USA	10,400,000	10,409,000	48	-0.1%	-0.1%
176	166	360PR+	USA	10,326,547	9,738,953	56	6.0%	6.0%
177	175	JPA Health Communications	USA	10,305,362	9,264,491	53	11.2%	11.2%
178	n/a	M&C Saatchi Talk	UK	10,296,000	12,800,000		-19.6%	-22.0%
179	137	Sloane & Company	USA	10,000,000	12,000,000	19	-16.7%	-16.7%
180	177	furrerhugi.	Switzerland	9,968,000	9,032,767	38	10.4%	-0.5%
181	156	LVT Group	Netherlands	9,915,930	10,347,210	75	-4.2%	-2.5%
182	186	Harvard	UK	9,795,720	8,224,000	78	19.1%	15.5%
183	174	Cicero Group	UK	9,636,000	9,313,350	70	3.5%	0.3%
184	189	LDWW	USA	9,568,620	8,042,792	31	19.0%	19.0%
185	170	MP&F Public Relations	USA	9,480,016	9,541,832	72	-0.6%	-0.6%
186	172	Jeschenko MedienAgentur	Germany	9,475,200	9,393,600	44	0.9%	2.7%
187	195	Max Borges Agency	USA	9,404,384	7,771,854	49	21.0%	21.0%
188	181	Narva	Sweden	9,344,280	8,200,280	57	14.0%	14.0%
189	169	Grupo CDI	Brazil	9,290,000	9,580,000	200	-3.0%	-3.0%
190	190	Vested	USA	9,236,000	7,344,000	39	25.8%	25.8%
191	n/a	Hot Paper Lantern	USA	9,076,690	8,714,381	35	4.2%	4.2%
192	328	Peppercomm	USA	9,000,000	8,800,000	30	2.3%	2.3%
192	178	Saxum	USA	9,000,000	9,000,000	51	0.0%	0.0%
194	176	SenateSHJ	New Zealand	8,886,880	9,307,298	53	-4.5%	-4.5%
195	188	Infinite Global	USA	8,857,808	8,055,189	41	10.0%	10.0%
196	328	Moore	USA	8,817,078	6,746,110	39	30.7%	30.7%
197	184	Greentarget	USA	8,765,100	8,467,300	42	3.5%	3.5%
198	328	Another Company	Mexico	8,725,502	7,486,110	160	16.6%	16.6%
199	196	BECG	UK	8,580,000	8,320,000	64	3.1%	0.0%
200	242	Threepipe Communications	UK	8,276,400	6,732,800	80	22.9%	19.2%
201	215	Tact Intelligence-conseil	Canada	8,249,642	6,523,000	72	26.5%	26.5%

PRovoke

Global PR Agency Rankings 2020

PROVOKE TOP 250 RANKINGS

2020 RANK	2019 RANK	AGENCY	HQ	FEE INCOME 2019 ($)	FEE INCOME 2018 ($)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
202	187	Nelson Bostock Unlimited	UK	8,226,240	8,064,000	73	2.0%	-1.1%
203	141	A&B One	Germany	8,120,000	11,970,000	50	-32.2%	-31.0%
204	183	Lou Hammond Group	USA	8,100,000	8,478,506	40	-4.5%	-4.5%
205	193	Sassy	UK	8,074,943	7,877,743	36	2.5%	-0.6%
206	206	EMG	The Netherlands	8,018,080	7,056,600	43	13.6%	15.7%
207	182	Rasky Partners	USA	8,000,000	8,600,000	32	-7.0%	-7.0%
208	194	komm.passion	Germany	7,840,000	7,866,000	64	-0.3%	1.4%
209	202	Frank	UK	7,796,160	7,372,136	52	5.8%	2.5%
210	199	Fink & Fuchs	Germany	7,366,834	7,666,500	72	-3.9%	-2.2%
211	201	Thomas Marko & Associes	France	7,280,000	7,410,000	36	-1.8%	0.0%
212	217	Kirchhoff Consult	Germany	7,231,311	6,968,631	57	3.8%	5.6%
213	209	RPMA Comunica ‹o	Brazil	7,195,000	6,890,000	150	4.4%	4.4%
214	204	AMI Communications	Czech Republic	7,168,000	7,333,620	85	-2.3%	-0.5%
215	207	Blumberry	Germany	7,123,200	6,976,800	53	2.1%	3.9%
216	200	Approach	Brazil	6,919,947	7,090,084	161	-2.4%	1.5%
217	238	Segmenta Communications	Germany	6,899,200	5,323,800	67	29.6%	31.9%
218	216	PLMR	UK	6,884,494	6,203,237	46	11.0%	7.6%
219	221	Monet + Associes	France	6,787,200	5,739,900	52	18.2%	20.4%
220	210	Klenk & Hoursch	Germany	6,720,000	6,885,600	55	-2.4%	-0.7%
221	247	EM	Russia	6,700,000	5,000,000	24	34.0%	34.0%
222	203	Pierpont Communications	USA	6,689,736	6,671,968	33	0.3%	0.3%
223	231	Kaltwasser Kommunikation	Germany	6,675,200	5,415,000	53	23.3%	25.5%
224	214	Octopus Group	UK	6,666,000	6,534,400	56	2.0%	-1.1%
225	234	Aspectus	UK	6,600,000	5,376,000	50	22.8%	19.0%
225	n/a	Madano Partnership	UK	6,600,000	5,888,000	32	12.1%	8.7%
227	211	Evercom	Spain	6,496,000	6,805,800	68	-4.6%	-2.8%
228	225	Konnect Agency	USA	6,481,237	5,754,446	31	12.6%	12.6%
229	220	Red Lorry Yellow Lorry	UK	6,468,000	5,760,000	28	12.3%	8.9%
230	222	Piabo PR	Germany	6,384,000	5,700,000	36	12.0%	14.0%
231	226	Sam Brown Inc.	USA	6,341,946	5,621,644	1	12.8%	12.8%
232	233	Dukas Linden Public Relations	USA	6,318,683	5,409,375	24	16.8%	16.8%
233	328	INK Communications Co.	USA	6,217,065	6,159,584	37	0.9%	0.9%
234	213	Eulogy!	UK	6,210,975	6,538,675	44	-5.0%	-7.9%
235	249	Clarity PR	USA	6,200,000	4,900,000	48	26.5%	26.5%
236	224	CP/compartner	Germany	6,003,200	5,677,200	66	5.7%	7.6%
237	241	Hawkins International Public Relations	USA	6,000,000	5,200,000	38	15.4%	15.4%
237	218	Partner of Promotion Sp. zo.o.	Poland	6,000,000	6,027,000	65	-0.4%	-0.4%
239	n/a	Navos	Germany	5,980,800	4,993,200	48	19.8%	21.9%
240	257	Bospar	USA	5,910,075	4,633,686	30	27.5%	27.5%
241	237	The Bulleit Group	USA	5,890,700	5,350,000	30	10.1%	10.1%
242	231	LoeschHundLiepold Kommunikation	Germany	5,880,000	5,415,000	48	8.6%	10.5%
243	239	Cannings Purple	Australia	5,854,309	5,312,797	40	10.2%	10.2%
244	328	URBAN Grupo de Comunicacion	Argentina	5,840,000	5,300,000	102	10.2%	10.2%
245	243	Whiteoaks International	UK	5,749,610	5,165,480	38	11.3%	7.9%
246	240	The Academy	UK	5,748,600	5,331,200	47	7.8%	4.6%
247	228	Seven Hills	UK	5,727,174	5,520,344	45	3.7%	0.6%
248	251	Ballou	UK	5,603,809	4,890,358	51	14.6%	11.1%
249	258	Kreos Reputation & PR	Germany	5,600,000	5,472,000	48	2.3%	4.2%
249	222	Trigger Oslo	Norway	5,600,000	5,700,000	45	-1.8%	0.0%
251	286	Firehouse Strategies	USA	5,560,387	3,239,139	17	71.7%	71.7%

GLOBAL RESULTS

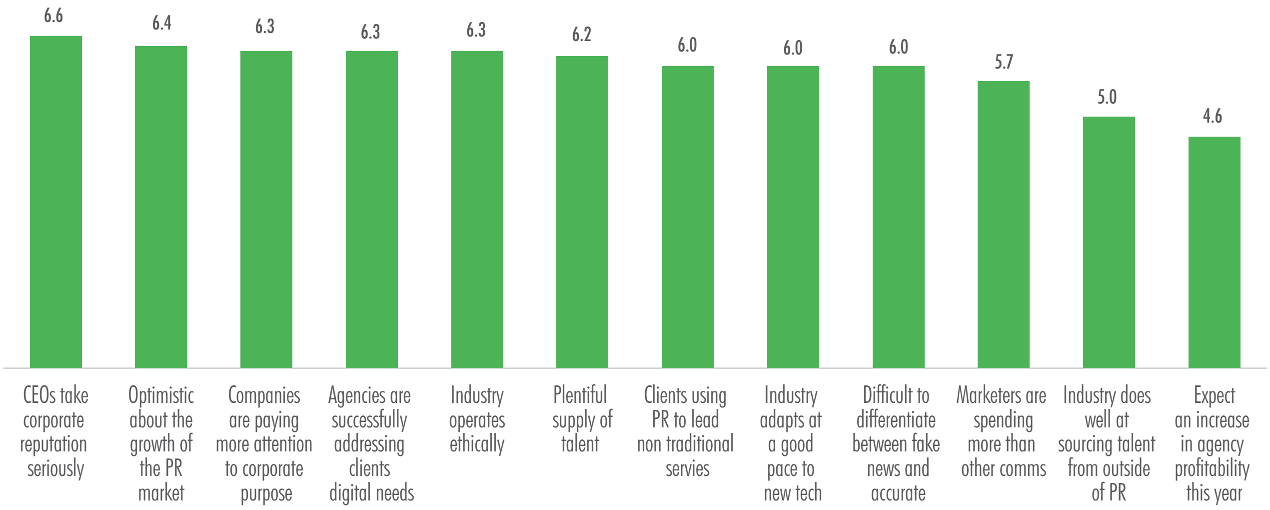
These results are based on findings from an online survey conducted between August and September 2020.

268 PR professionals were surveyed from the following regions:

Africa
Asia-Pacific
Eastern Europe*
Western Europe
United Kingdom
North America *
Latin America *
Middle East

*Sample sizes between 20-30 participants

Perceived growth and opportunity

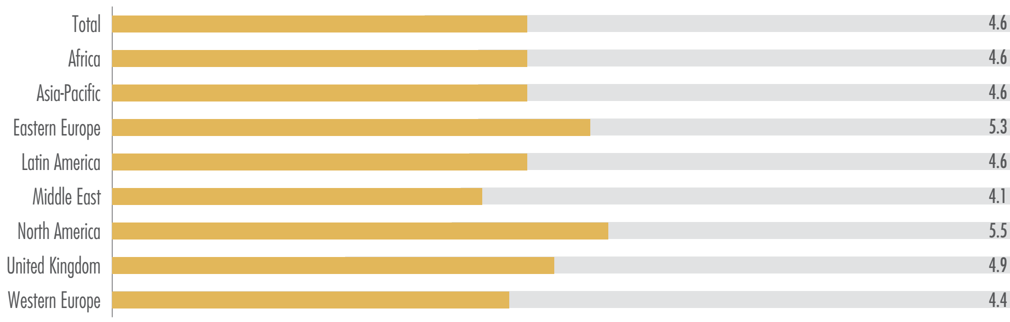


Base: All who work in PR(268)Q1.
"Tell us how much you agree with these statements as they relate to on a scale of 1 to 10, where 1 = strong disagreement and 10 = strong agreement."

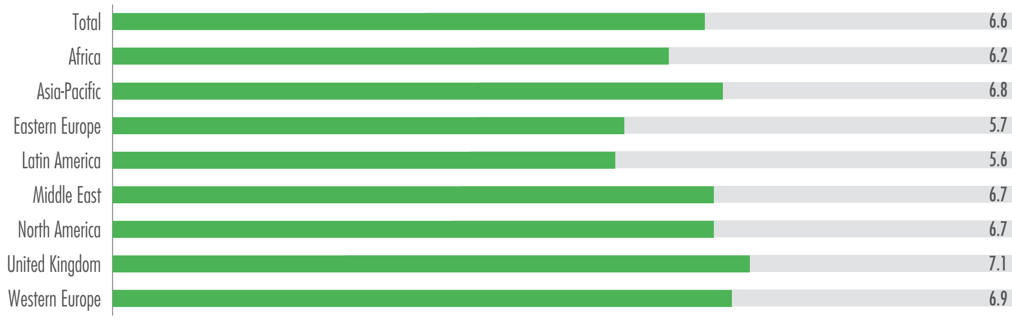
Average levels of agreement on a 10 point scale

I am optimistic about the growth of the public relations market

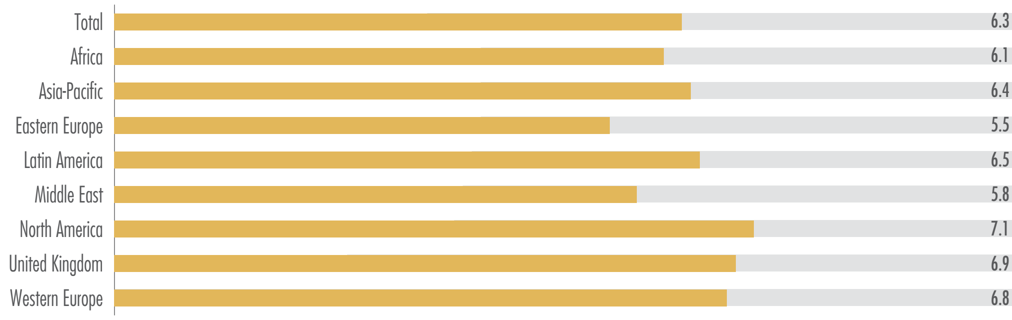
Expect an increase in agency profitability this year



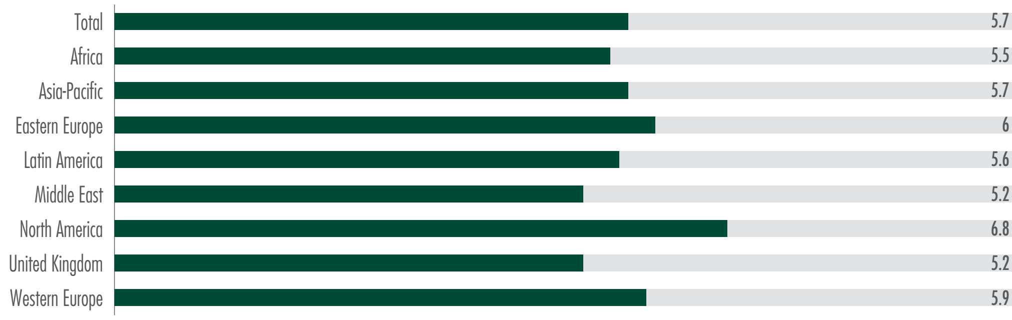
Corporate CEOs take corporate reputation seriously



Companies are paying more attention to corporate purpose



Marketers are spending more money in comparison to other communications disciplines

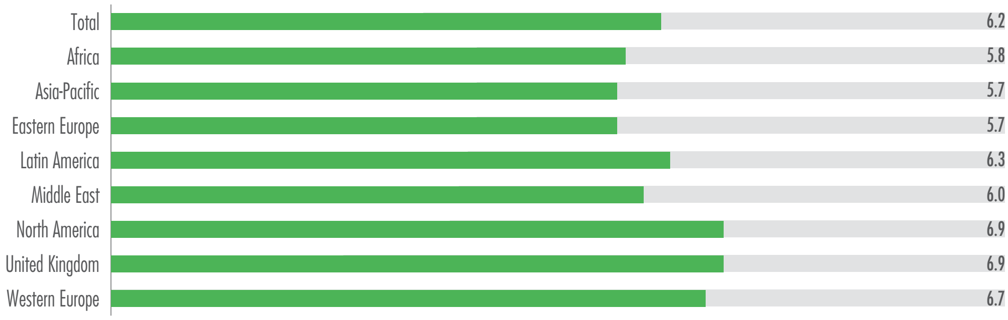


Clients in this market are willing to turn to PR firms to provide non-traditional services such as advertising and marketing

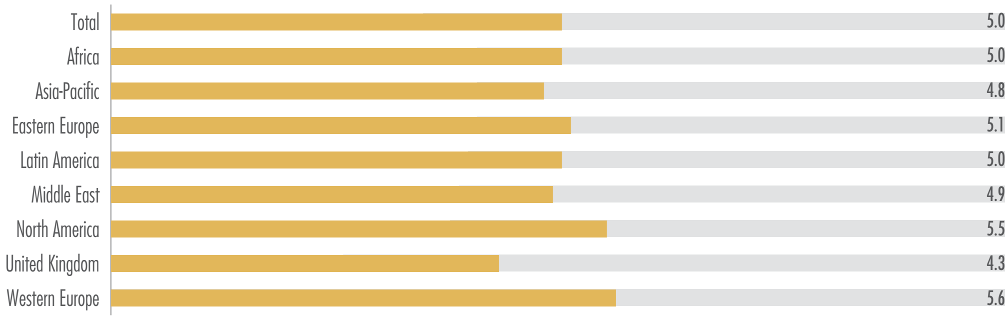
PR agencies are successfully addressing clients' digital needs

Participants indicated how much they agreed with each statements, in relation to their market, on a scale of 1 to 10, where 1 = strong disagreement and 10 = strong agreement'

There is a plentiful supply of talent in PR



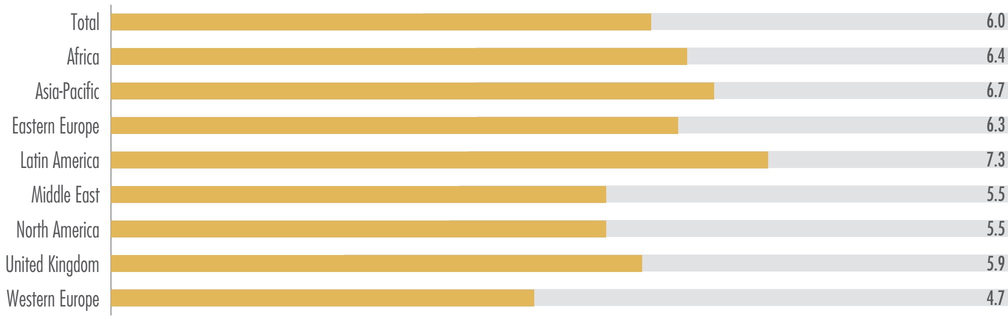
The PR industry does a good job of sourcing talent from outside the industry



The PR industry is adapting to new technologies at an appropriate pace

The PR industry operates ethically

It is becoming difficult to differentiate between accurate information and fake news

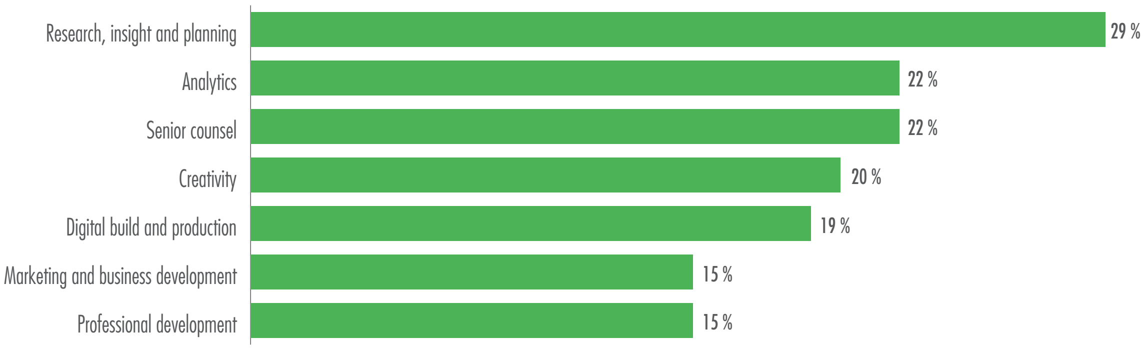


Participants indicated how much they agreed with each statements, in relation to their market, on a scale of 1 to 10, where 1 = strong disagreement and 10 = strong agreement'

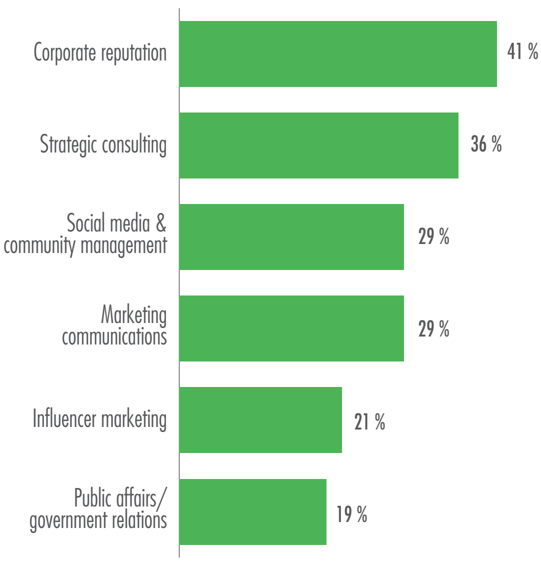
GROWTH AND OPPORTUNITY

Expected areas of investment for 2021

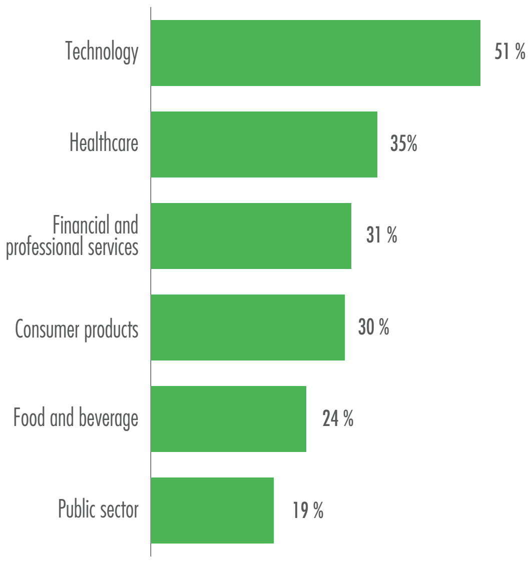
Social media community management 32% | **Multimedia content creation 31%** | **Influencer marketing 29%**



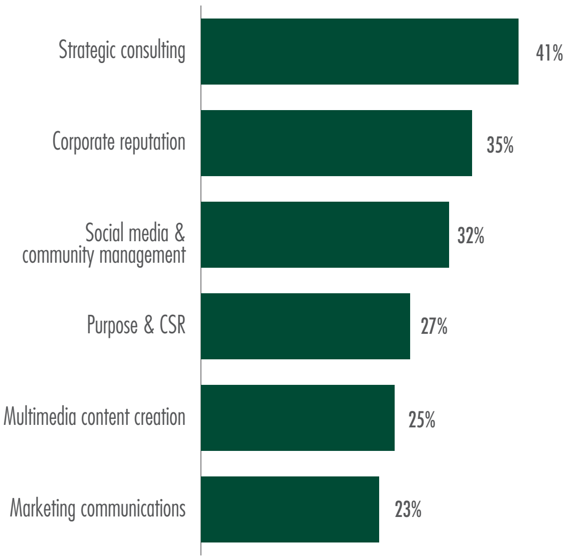
Areas of growth - last year



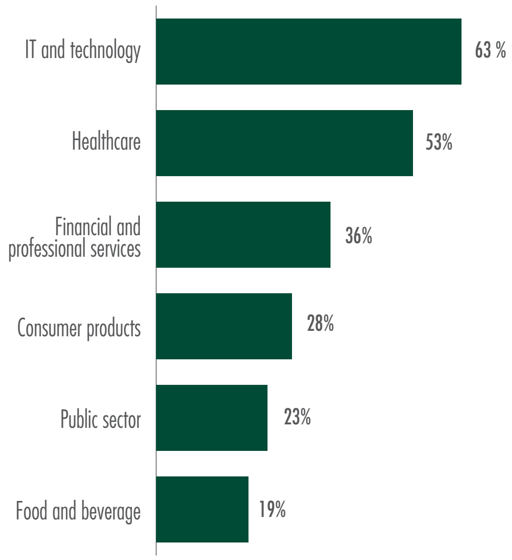
Sectors of growth - last year



Expected areas of growth over the next five years

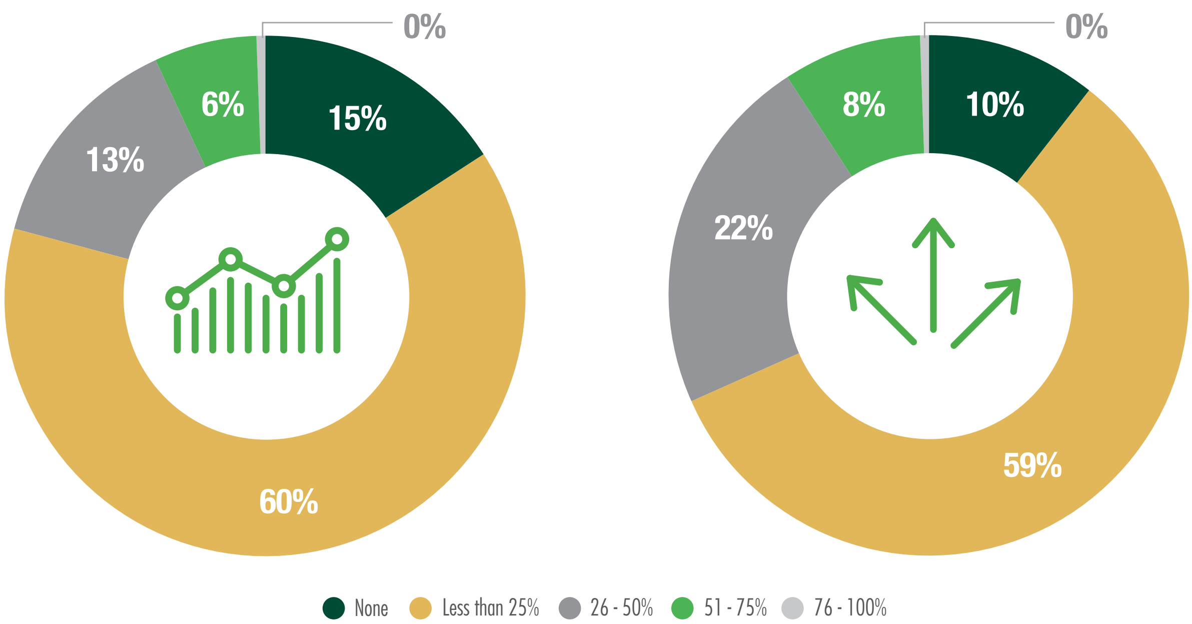


Expected sectors of growth over the next five years



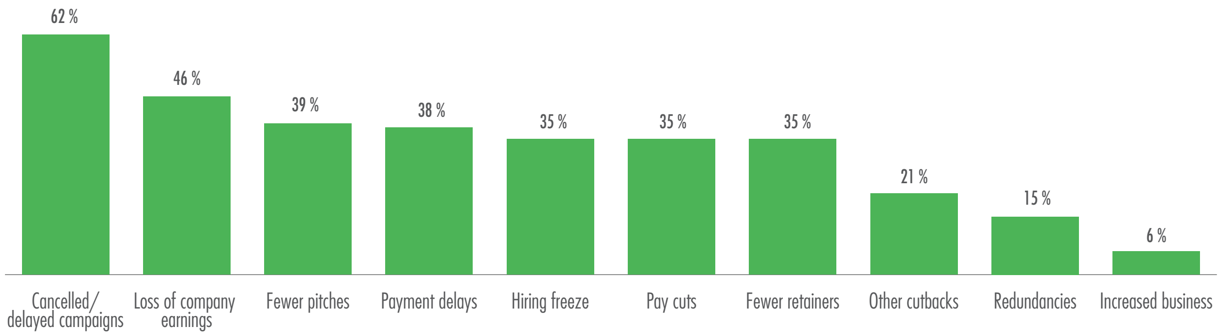
Current work allocation (Paid Media)

Forecasted growth (Paid media)

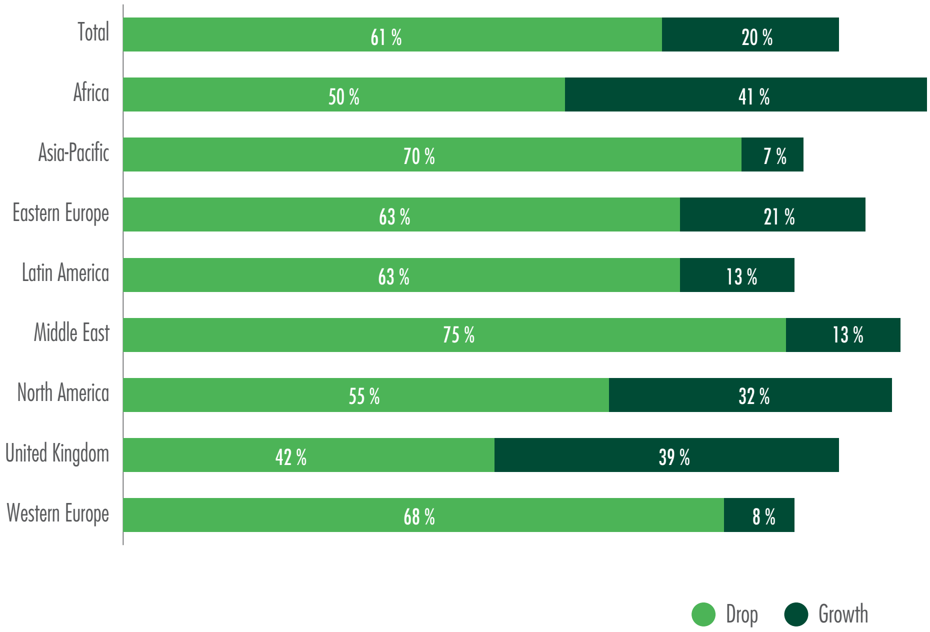


IMPACT OF THE COVID-19 PANDEMIC

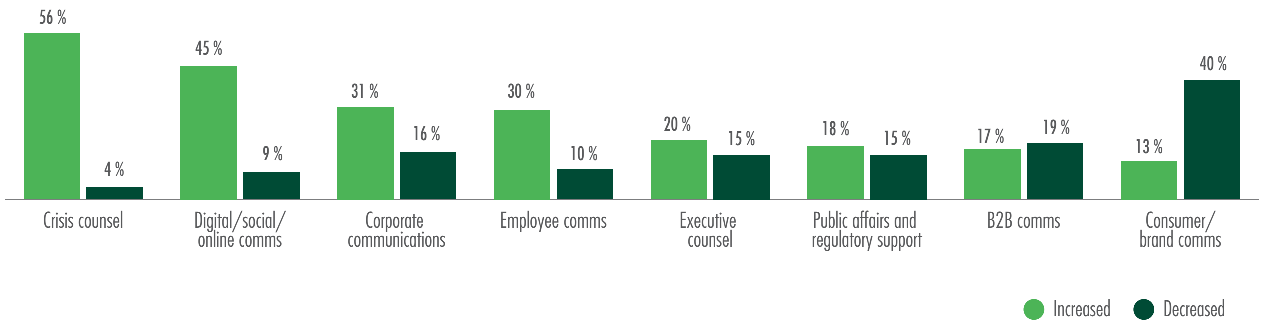
Impact of Covid-19 on PR firms



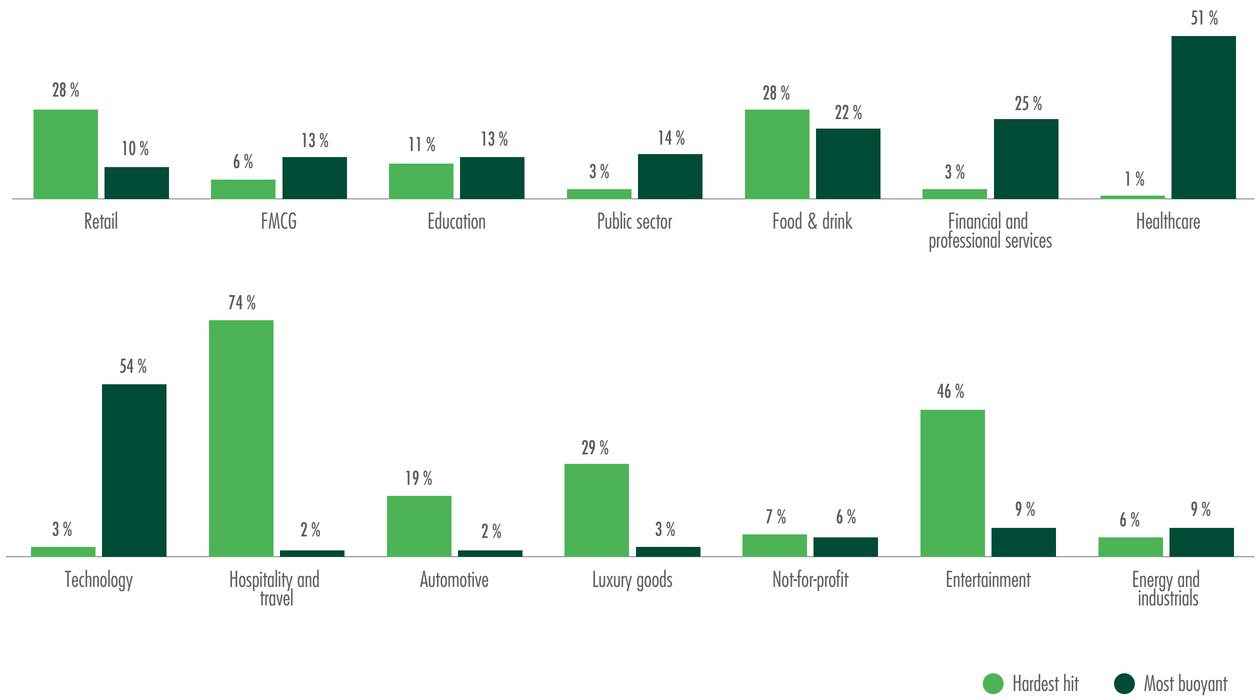
% expecting drop or growth of client income fee



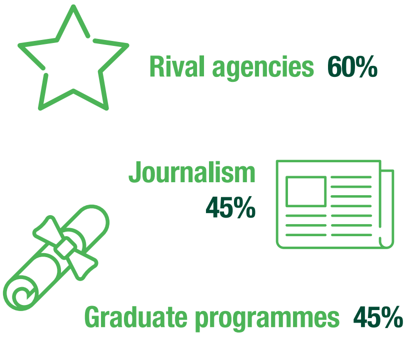
PR services that have decreased or increased due to Covid-19

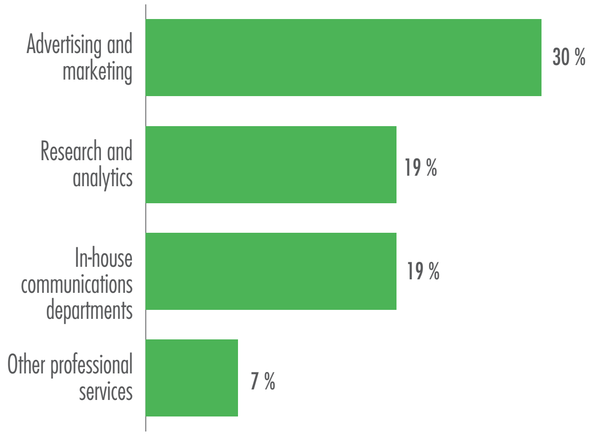


Hardest hit and most buoyant industry sectors during the pandemic

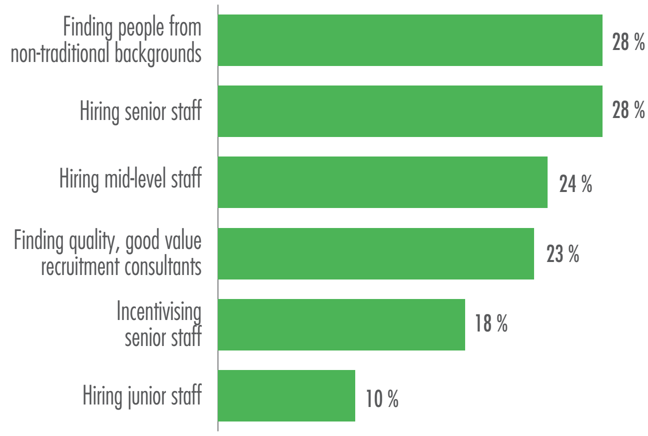


Expecting to source talent from

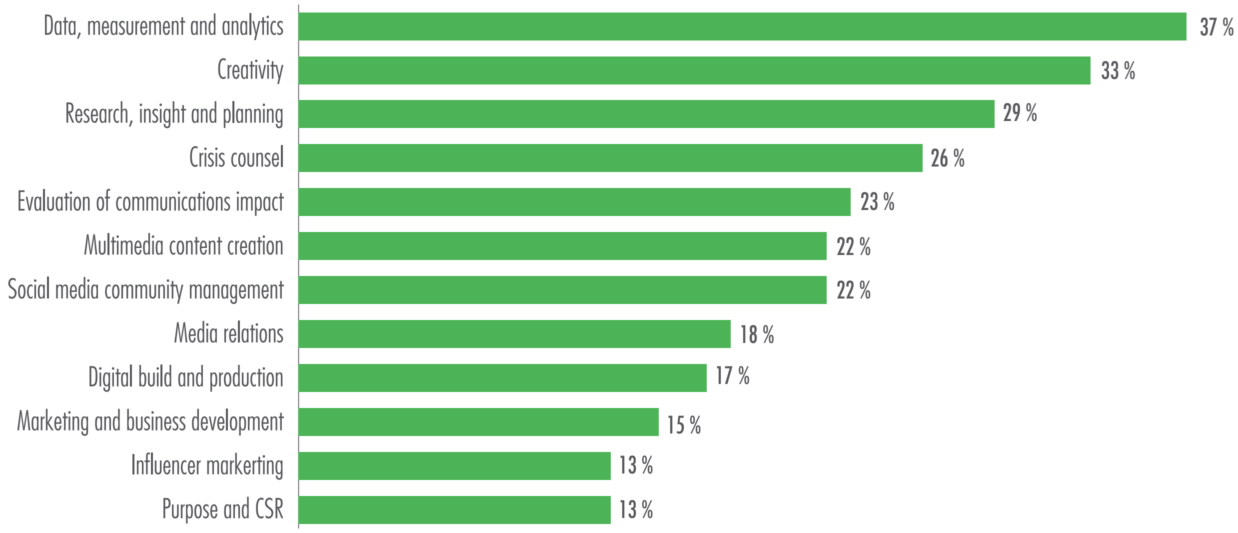




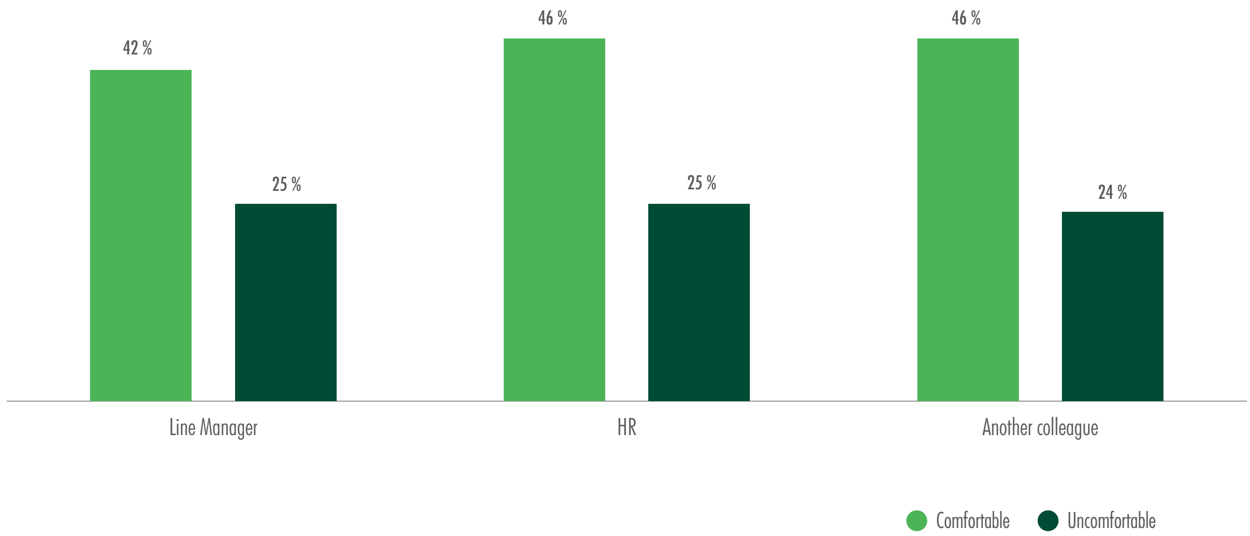
Talent strategy challenges



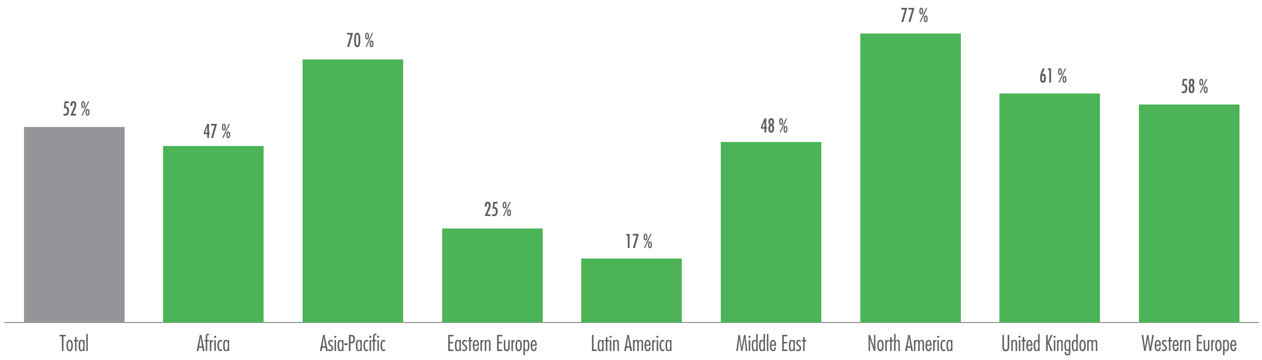
Future talent relevant skill sets



How comfortable or uncomfortable would you feel talking to the following if you were experiencing mental health issues?



% of firms that have formal mental health and wellbeing support



DIVERSITY AND INCLUSION IN THE PR INDUSTRY – WHAT'S THE STATUS QUO?

Mélanie Chevalier

FOUNDER, CREATIVE CULTURE

A review of ICCO's World PR Report's findings point to a very mixed global picture across the three key areas of having in-house D&I policies, reviewing these policies on an ongoing basis, and being an employer that ensures representation and diversity in the workforce.

The Report highlights some interesting contradictions. For example, whilst the USA and UK score well on raising the importance of diversity and inclusion over the period, their sector falls on as being "not representative" of local ethnic demographics. The picture across the rest of the world is mixed – Latin America and Western Europe score below five, whereas Eastern Europe, Africa, APAC and Middle East are more optimistic in their outlook but showcasing there is still some room for improvement across the board.

When working on a global scale, we must not assume the term diversity means the same thing everywhere. If you have offices in India, Brazil, UAE and Korea for instance, you will be facing different challenges and expectations, therefore it is important to consult different experts for each marketplace and customise your approach. Even within the same country, this may vary region to region, and it is important to be sensitive of this.

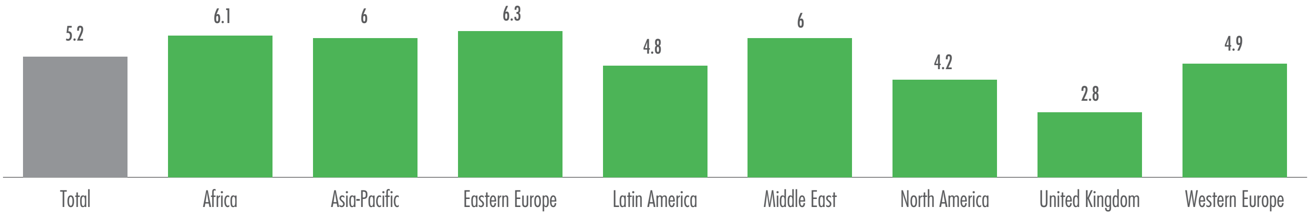
What are the ways to improve then – to make a real change? The key is to be proactive, to engage and to prove authenticity – EDUCATE, ENGAGE, EMPOWER.

- **EDUCATE**: raise awareness of what the real challenge is and how to become more inclusive internally and externally – get coaches involved, ensure to seek advice from those with relevant experience in diversity matters whatever the angle (gender, ethnicity, mobility, mental health).
- **ENGAGE**: getting activists on the subject matter is also very powerful. They may not be experts in your industry or subject matter but are certainly the most engaged on this topic and will work as a great sounding board for initiatives you are developing. This is also sending a message to the industry and your audiences that you are active in making this change happen.
- **EMPOWER**: look at developing internal tools and guidelines, such as Cultural Compasses to support your teams in the long run. Whether you are externally or internally facing, the input of cultural experts or semioticians to soundproof and feed your initiatives and messages will ensure they land well and are always inclusive.

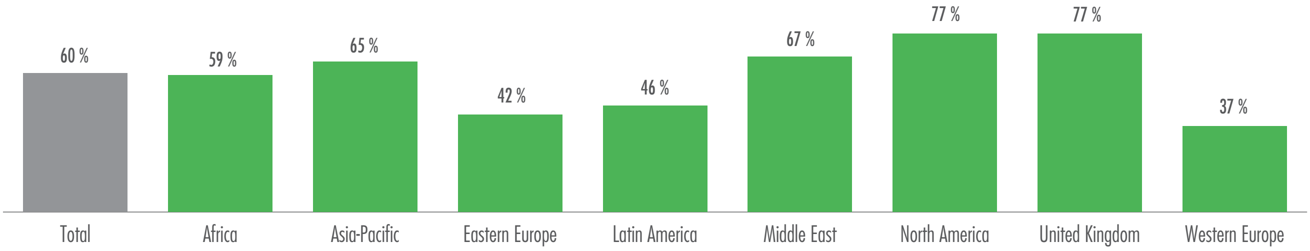
In conclusion, it is a message of possibilities and of hope. More and more companies and brands now understand and value the importance of diversity and inclusion and are actively looking at resolving both international and domestic challenges around the whole topic and throughout their organisations and communications.

As raised by Neuroscience Consultant and Author, Hilary Scarlett, it is proven that diversity increases productivity at work: "Research studies show that diverse teams can have a positive impact on the quality of our thinking. It interrupts one of our brain's shortcuts where we tend to behave unthinkingly as others do." Therefore, the benefits are not just relevant to certain groups or the world of Comms but can be seen across the organisation.

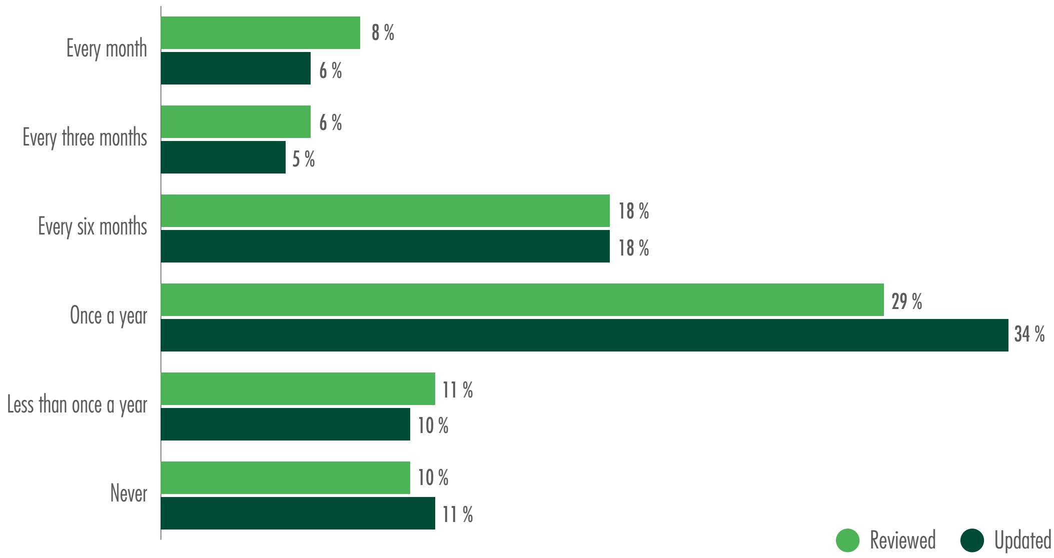
Diversity - reflecting ethnicity demographics



% of firms that have a diversity and inclusion policy



When is the diversity and inclusion policy reviewed or updated?



PROVING OUR VALUE

Richard Bagnall
Chair, AMEC

CO-MANAGING PARTNER,
CARMA INTERNATIONAL

What a tough year 2020 has proved to be for so many communications and PR professionals all over the world. The impact of COVID has been severe on our industry with over 60% of ICCO members citing cancelled or delayed work and nearly half pointing to a loss in company earnings. As we write ahead of going to press in October 2020, the global situation is feared likely to get worse before it begins to get better, with many expecting significant budget cuts and job losses still to come. 2021 is looking like it will be another very tough year.

This new business reality means that PR and communications professionals must operate in the age of accountability. We will have to defend and fight for budget every step of the way.

To do this, we must prove our value to client organisations in meaningful and credible ways. We cannot afford to be seen as a cost centre, just running tasks and activities that have little or no tangible benefit to the client organisation. We cannot continue to sit in a comfort bubble counting activity driven vanity metrics that show no link to organisational goals and desired outcomes. We cannot confuse meaningful measurement with counting ‘stuff’. We must defend budgets with proof of value, not just evidence of activity. Measurement and evaluation must evolve quickly to reflect this.

Happily, ICCO’s members recognise this. Looking to the future, in all regions across the world, ‘data, measurement and evaluation’ and ‘Research, Insight and Planning’ skills are listed as in the top three skill sets most relevant and in demand to the industry.

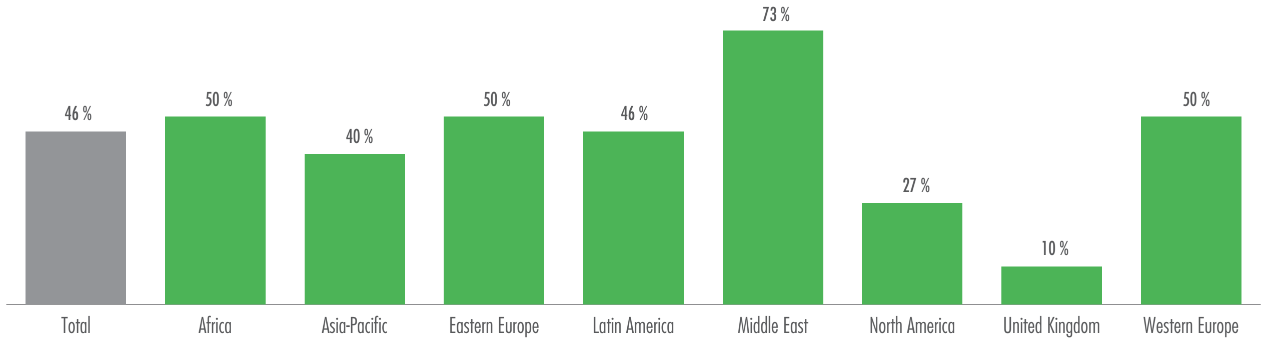
The good news is that help is at hand. AMEC, the global trade association that represents best practice in the communications evaluation sector, is focussed on educational initiatives to upskill the sector with the confidence and tools to do exactly this. It is reassuring to see that three quarters of the ICCO membership now report that they are using AMEC’s free resources and tools, up from 50% last year.

AMEC has created the Barcelona Principles (refreshed for 2020), the Integrated Evaluation Framework, the Measurement Maturity Mapper and the Strategic Planning Guide and made them all freely available in multiple languages. Do check them out at www.amecorg.com.

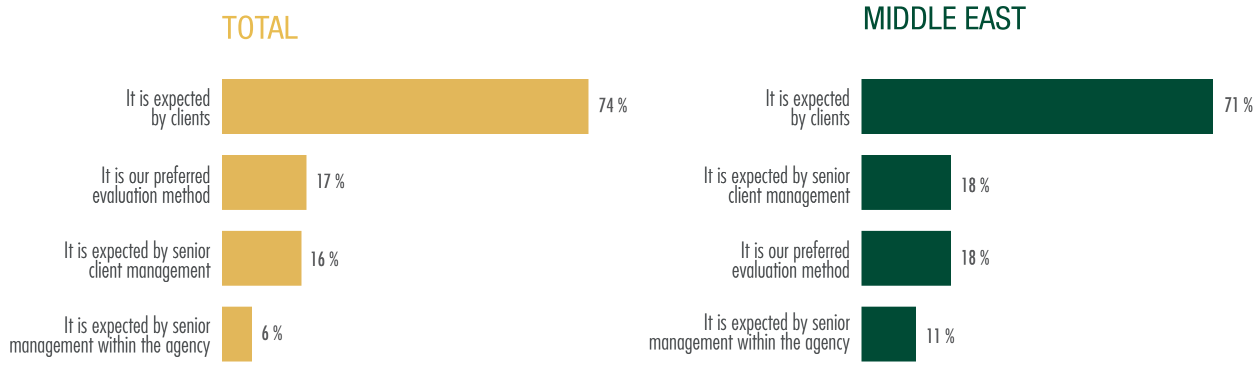
The measurement and evaluation news is not all rosy however. Too many ICCO members are still reporting that they use AVE, despite it being globally condemned as a meaningless metric (more here: www.bit.ly/saynotoaves). While the trend for its use continues to be downward, in some regions AVE is still far too prevalent, with the oft repeated excuse that it is being produced ‘because the client demands it’. In this age of accountability and as we seek to elevate our positioning to that of strategic counsellors, we must have the courage to stand up to clients requesting meaningless metrics and all must play our part in the global educational challenge.

AMEC values our partnership with ICCO. We look forward to working with the global communications industry, helping it to navigate these challenging times with hard evidence of the value and benefits it creates.

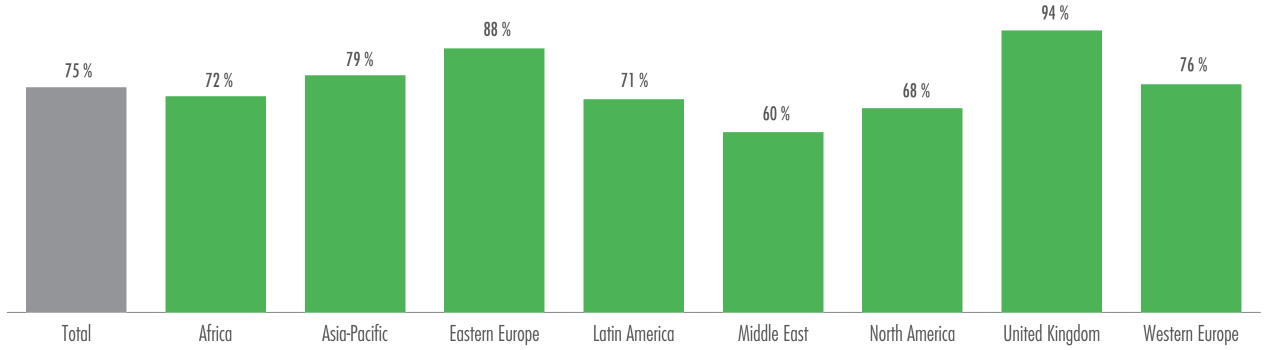
Use of AVEs by region



Reasons why AVEs are used



Use AMEC tools and guides



Most used B2C Social media platform

Instagram 42% Facebook 30% Twitter 11%

LinkedIn 7% | YouTube 1% | TikTok 1%

7% do not use social media for B2C purposes

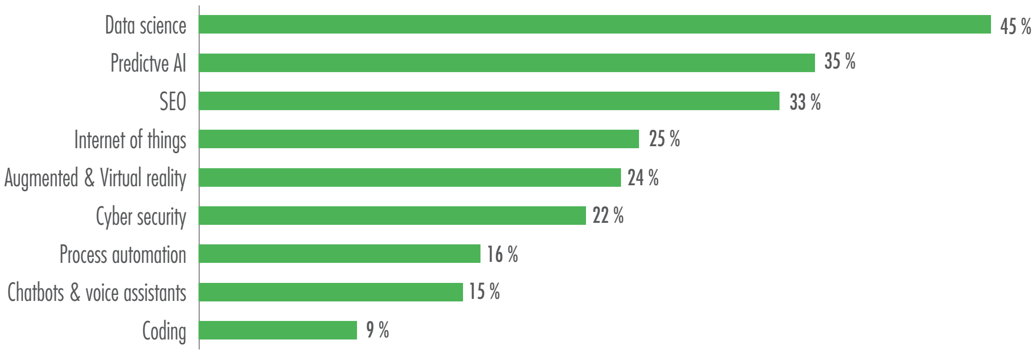
Most used B2B Social media platform

LinkedIn 56% Twitter 13% Facebook 13%

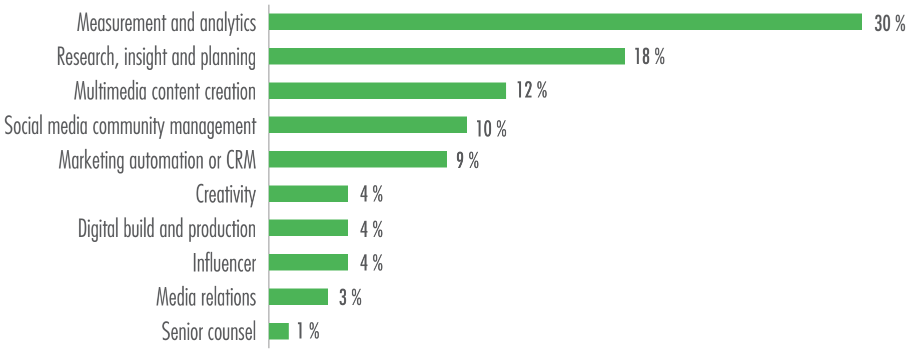
Instagram 12%

2% do not use social media for B2B purposes

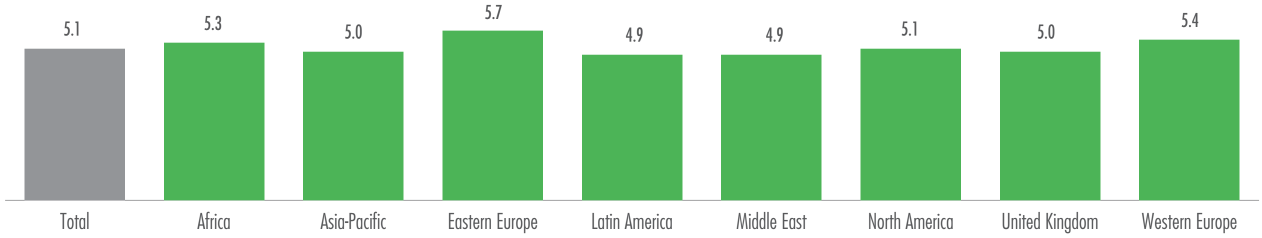
Most relevant technologies – future prediction



Technology having greatest impact – future prediction



Rating of adoption of new technology by regions



Rating out of 10, where 0 is poor at adopting technology and 10 is excellent

Most likely client requests

- Media clippings 29 %
- Connecting communications activity to business results 20 %
- Engagement metrics 17 %
- Advertising value equivalency (AVE) 13%
- Website analytics 5 %
- Awareness metrics 4 %

Most important objectives to clients' public relations goals

- Product marketing & sales 44 %
- Corporate reputation 37 %
- Issues & crisis management 6 %

Purpose and social issues clients are most likely to address

- Sustainability & climate change 56 %
- Diversity & social inclusion 46 %
- Healthcare 33 %

REGIONAL RESULTS

Top 3 most commonly selected answers

1

In which of the following areas did your organisation see the most growth last year?

1. Corporate reputation
2. Strategic Consulting
3. Social media and community management

2

In which of the following sectors did you see the most growth last year?

1. Technology
2. Financial and professional services
3. Healthcare

3

In which of the following areas do you expect an increase in PR firms' investment this year?

1. Multimedia content creation
2. Social media
3. Research, insight and planning

4

Which of the following issues do you believe pose the greatest challenges for the PR firms in your market?

1. Economic conditions generally
2. Pandemic recovery
3. Clients unwilling to commit sufficient funds

5

Which of the following do you think are currently the biggest ethical challenges for PR professionals and agencies?

1. Lack of consequences for agencies that do not behave ethically
2. Pressure from clients
3. Balancing agency income, growth with considerations around ethical behaviour and clients

6

Which of the following services have you seen an increased demand for during the Covid-19 pandemic?

1. Employee comms
2. Crisis counsel
3. Digital, social and online comms

7

Which industry sectors have proved to be most buoyant during the pandemic?

1. Technology
2. Healthcare
3. Financial and professional services

8

What is the biggest challenge PR agencies face when it comes to their talent strategy?

1. Retaining key talent
2. Training and developing junior and mid-level staff
3. Hiring senior staff

9

Looking at the next decade, which skill sets will be most relevant for PR executives?

1. Data, measurement and analytics
2. Research, insight and planning
3. Evaluation of communications impact

10

When it comes to purpose and social issues, which of the following are your clients most likely to address?

1. Education
2. Diversity and social inclusion
3. Sustainability and climate change

ASIA-PACIFIC

Top 3 most commonly selected answers

1
In which of the following areas did your organisation see the most growth last year?

1. Corporate Reputation
2. Strategic consulting
3. Social media and community management

2
In which of the following sectors did you see the most growth last year?

1. Technology
2. Healthcare
3. Financial and professional services

3
In which of the following areas do you expect an increase in PR firms' investment this year?

1. Influencer marketing
2. Research, insight, and planning
3.Social media

4
Which of the following issues do you believe pose the greatest challenges for the PR firms in your market?

1. Economic conditions generally
2. Pandemic recovery
3. Clients unwilling to commit sufficient funds

5
Which of the following do you think are currently the biggest ethical challenges for PR professionals and agencies?

1. Lack of consequences for agencies that do not behave ethically
2. Pressure from clients
3. Balancing agency income, growth with considerations around ethical behaviour and clients

6
Which of the following services have you seen an increased demand for during the Covid-19 pandemic?

1. Crisis counsel
2. Digital, social, and online comms
3. Corporate communications

7
Which industry sectors have proved to be most buoyant during the pandemic?

1. Healthcare
2. Technology
3. Financial and professional services

8
What is the biggest challenge PR agencies face when it comes to their talent strategy?

1. Retaining key talent
2. Hiring mid-level staff
3. Training and developing junior and mid-level staff

9
Looking at the next decade, which skill sets will be most relevant for PR executives?

1. Data, measurement and analytics
2. Creativity
3. Research, insight, and planning

10
When it comes to purpose and social issues, which of the following are your clients most likely to address?

1. Sustainability and climate change
2. Diversity and social inclusion
3. Healthcare

Top 3 most commonly selected answers

1
In which of the following areas did your organisation see the most growth last year?

1. Corporate reputation
2. Strategic consulting
3. Social media and community management

2
In which of the following sectors did you see the most growth last year?

1. Consumer products
2. Technology
3. Financial and professional services

3
In which of the following areas do you expect an increase in PR firms' investment this year?

1. Social media
2. Multimedia
3. Influencer marketing

4
Which of the following issues do you believe pose the greatest challenges for the PR firms in your market?

1. Pandemic recovery
2. Economic conditions generally
3. Clients unwilling to commit sufficient funds

5
Which of the following do you think are currently the biggest ethical challenges for PR professionals and agencies?

1. Misinformation and disinformation
2. Pressure from clients
3. Lack of consequences for agencies that do not behave ethically

6
Which of the following services have you seen an increased demand for during the Covid-19 pandemic?

1. Crisis counsel
2. Employee comms
3. Digital, social, and online comms

7
Which industry sectors have proved to be most buoyant during the pandemic?

1. Technology
2. Healthcare
3. Food and drink

8
What is the biggest challenge PR agencies face when it comes to their talent strategy?

1. Retaining key talent
2. Hiring senior staff
3. Motivating younger executives

9
Looking at the next decade, which skill sets will be most relevant for PR executives?

1. Creativity
2. Crisis counsel
3. Evaluation of communications impact

10
When it comes to purpose and social issues, which of the following are your clients most likely to address?

1. Sustainability and climate change
2. Education
3. Healthcare

LATIN AMERICA

Top 3 most commonly selected answers

1

In which of the following areas did your organisation see the most growth last year?

1. Social media and community management
2. Public affairs and government relations
3. Multimedia content creation

2

In which of the following sectors did you see the most growth last year?

1. Social media and community management
2. Public affairs and government relations
3. Multimedia content creation

3

In which of the following areas do you expect an increase in PR firms' investment this year?

1. Influencer marketing
2. Social media
3. Multimedia

4

Which of the following issues do you believe pose the greatest challenges for the PR firms in your market?

1. Economic conditions generally
2. Pandemic recovery
3. Competition from other marketing disciplines

5

Which of the following do you think are currently the biggest ethical challenges for PR professionals and agencies?

1. Misinformation and disinformation
2. Lack of internal policy on ethical behaviour
3. Lack of consequences for agencies that do not behave ethically

6

Which of the following services have you seen an increased demand for during the Covid-19 pandemic?

1. Crisis counsel
2. Digital, social and online comms
3. Corporate communications

7

Which industry sectors have proved to be most buoyant during the pandemic?

1. Financial and professional services
2. Technology
3. Healthcare

8

What is the biggest challenge PR agencies face when it comes to their talent strategy?

1. Hiring senior staff
2. Finding quality, good value recruitment consultants
3. Retaining key talent

9

Looking at the next decade, which skill sets will be most relevant for PR executives?

1. Data, measurement and analytics
2. Creativity
3. Research, insight, and planning

10

When it comes to purpose and social issues, which of the following are your clients most likely to address?

1. Diversity and social inclusion
2. Sustainability and climate change
3. Tech platforms and fake news

MIDDLE EAST

Top 3 most commonly selected answers

1
In which of the following areas did your organisation see the most growth last year?

1. Corporate reputation
2. Marketing Communications
3. Strategic Consulting

2
In which of the following sectors did you see the most growth last year?

1. Technology
2. Food and beverage
3. Consumer products

3
In which of the following areas do you expect an increase in PR firms' investment this year?

1. Multimedia
2. Social Media
3. Influencer Marketing

4
Which of the following issues do you believe pose the greatest challenges for the PR firms in your market?

1. Pandemic recovery
2. Clients unwilling to commit sufficient funds
3. Economic conditions generally

5
Which of the following do you think are currently the biggest ethical challenges for PR professionals and agencies?

1. Lack of consequences for agencies that do not behave ethically
2. Pressure from clients
3. Balancing agency income, growth with considerations around ethical behaviour and clients

6
Which of the following services have you seen an increased demand for during the Covid-19 pandemic?

1. Digital, social, and online comms
2. Crisis counsel
3. Corporate communications

7
Which industry sectors have proved to be most buoyant during the pandemic?

1. Technology
2. Healthcare
3. Financial and professional services

8
What is the biggest challenge PR agencies face when it comes to their talent strategy?

1. Retaining key talent
2. Motivating younger executives
3. Training and developing junior and mid-level staff

9
Looking at the next decade, which skill sets will be most relevant for PR executives?

1. Creativity
2. Data, measurement, and analytics
3. Crisis counsel

10
When it comes to purpose and social issues, which of the following are your clients most likely to address?

1. Sustainability and climate change
2. Diversity and social inclusion
3. Healthcare

NORTH AMERICA

Top 3 most commonly selected answers

1
In which of the following areas did your organisation see the most growth last year?

1. Marketing communications
2. Social media and community management
3. Influencer marketing

2
In which of the following sectors did you see the most growth last year?

1. Technology
2. Healthcare
3. Consumer products

3
In which of the following areas do you expect an increase in PR firms' investment this year?

1. Measurement of communications
2. Multimedia
3. Creativity

4
Which of the following issues do you believe pose the greatest challenges for the PR firms in your market?

1. Pandemic recovery
2. Economic conditions generally
3. Clients unwilling to commit sufficient funds

5
Which of the following do you think are currently the biggest ethical challenges for PR professionals and agencies?

1. Pressure from clients
2. Balancing agency income, growth with considerations around ethical behaviour and clients
3. Lack of consequences for agencies that do not behave ethically

6
Which of the following services have you seen an increased demand for during the Covid-19 pandemic?

1. Crisis counsel
2. Digital, social, and online comms
3. Employee comms

7
Which industry sectors have proved to be most buoyant during the pandemic?

1. Financial and professional services
2. Technology
3. Healthcare

8
What is the biggest challenge PR agencies face when it comes to their talent strategy?

1. Hiring mid-level staff
2. Retaining key talent
3. Training and developing junior and mid-level staff

9
Looking at the next decade, which skill sets will be most relevant for PR executives?

1. Creativity
2. Data, measurement, and analytics
3. Research, insight, and planning

10
When it comes to purpose and social issues, which of the following are your clients most likely to address?

1. Diversity and social inclusion
2. Sustainability and climate change
3. Healthcare

UNITED KINGDOM

Top 3 most commonly selected answers

1
In which of the following areas did your organisation see the most growth last year?

1. Corporate reputation
2. Strategic consulting
3. Marketing communications

2
In which of the following sectors did you see the most growth last year?

1. Technology
2. Healthcare
3. Financial and professional services

3
In which of the following areas do you expect an increase in PR firms' investment this year?

1. Research, insight and planning
2. Multimedia
3. Analytics

4
Which of the following issues do you believe pose the greatest challenges for the PR firms in your market?

1. Pandemic recovery
2. Economic conditions generally
3. Clients unwilling to commit sufficient funds

5
Which of the following do you think are currently the biggest ethical challenges for PR professionals and agencies?

1. Balancing agency income, growth with considerations around ethical behaviour and clients
2. Lack of consequences for agencies that do not behave ethically or work for unethical clients
3. Pressure from clients

6
Which of the following services have you seen an increased demand for during the Covid-19 pandemic?

1. Crisis counsel
2. Digital, social, and online comms
3. Corporate communications

7
Which industry sectors have proved to be most buoyant during the pandemic?

1. Technology
2. Healthcare
3. Financial and professional services

8
What is the biggest challenge PR agencies face when it comes to their talent strategy?

1. Finding people from non-traditional backgrounds
2. Retaining key talent
3. Training and developing junior and mid-level staff

9
Looking at the next decade, which skill sets will be most relevant for PR executives?

1. Data, measurement, and analytics
2. Research, insight, and planning
3. Crisis counsel

10
When it comes to purpose and social issues, which of the following are your clients most likely to address?

1. Diversity and social inclusion
2. Sustainability and climate change
3. Data privacy

WESTERN EUROPE

Top 3 most commonly selected answers

1
In which of the following areas did your organisation see the most growth last year?

1. Strategic consulting
2. Corporate reputation
3. Social media and community management

2
In which of the following sectors did you see the most growth last year?

1. Healthcare
2. Technology
3. Financial and professional services

3
In which of the following areas do you expect an increase in PR firms' investment this year?

1. Social media
2. Research, insight, and planning
3. Analytics Multimedia content creation

4
Which of the following issues do you believe pose the greatest challenges for the PR firms in your market?

1.Pandemic recovery
2. Economic conditions generally
3. Financial pressure to meet profit and margin targets

5
Which of the following do you think are currently the biggest ethical challenges for PR professionals and agencies?

1. Balancing agency income, growth with considerations around ethical behaviour and clients
2. Lack of consequences for agencies that do not behave ethically or work for unethical clients
3. Pressure from clients

6
Which of the following services have you seen an increased demand for during the Covid-19 pandemic?

1. Crisis counsel
2. Digital, social, and online comms
3. Public affairs and regulatory support

7
Which industry sectors have proved to be most buoyant during the pandemic?

1. Healthcare
2. Technology
3. Food and drink

8
What is the biggest challenge PR agencies face when it comes to their talent strategy?

1. Retaining key talent
2. Hiring new staff
3. Motivating younger executives

9
Looking at the next decade, which skill sets will be most relevant for PR executives?

1. Data, measurement, and analytics
2. Creativity
3. Research insight and planning

10
When it comes to purpose and social issues, which of the following are your clients most likely to address?

1. Sustainability and climate change
2. Diversity and social inclusion
3. Healthcare

A PIVOTAL MOMENT FOR AFRICA

Overview

Reputation has never been harder-earned or more vital to business success. At the same time, it has never been more fragile.

While some threats are constant, new ones are emerging all the time. In the last 12 months, issues have spiked around the #Metoo movement, political unrest on both sides of the Atlantic and data misuse have caused major issues, and today COVID-19 is disrupting businesses around the world in an unprecedented way.

Many of the most valuable African brands stand to lose up to $60bn of cumulative brand value following COVID-19 pandemic. (Source: Brand Finance Africa 2020 report)

COVID-19 changing crisis communications forever

COVID-19 is not just changing the way we do business now; the ramifications will be felt long into the future.

On the African economic front, the crisis in jobs and livelihoods has had a major impact on business, corporates, multinationals as well as agencies.

As with any global health crisis, the Coronavirus outbreak has three distinct phases. The duration of these phases is unknown or may be different in each country or region; however, each stage has implications for the decisions that businesses make.

Cyber security at the forefront of corporate reputation

Corporate reputation is essential to cybersecurity resilience. Africa has become the new hunting ground for cyber criminals and fraudsters looking to exploit user vulnerabilities.

With Africa's Internet penetration about to double to one billion Internet users by 2022, the continent has become an attractive target. Africa's people are under cyber-attack and many of these users will be connecting for the first time and will have very little awareness of the risks.

According to an Accenture report, Sub-Saharan Africa is the region with the most financial transactions happening via mobile devices. Public relations play a key role in educating users of the risks of using their mobile devices.

Social media on the increase

COVID-19 has greatly impacted technology and the growth of social media. More and more Africans are using mobile devices to access social media platforms on the internet. The global media landscape has changed. Consumer behaviour and media consumption has shaped the way we communicate on the continent.

Engagement of sponsored content has increased by over 40%. The increase is likely due to more time spent, which presents a major opportunity for brands.

Bridget von Holdt

SVP, COHN, AND WOLFE
AFRICA PRESIDENT, ICCO

Communication and diversity

As many parts of the world grapple with how to move forward and learn from one another, it is no different in Africa. Brands, corporations, and organisations need to take a stand: to listen, to learn, to act in meaningful ways.

Diversity and inclusion within communications and public relations is particularly important for companies as we serve as an essential voice in guiding the strategic communications direction of a company, especially during crisis.

PURPOSE-LED COMMUNICATIONS ARE CAUSE FOR OPTIMISM

Nitin Mantri

CEO, AVIANWE
PRESIDENT, ICCO

Optimistic outlook

The ongoing COVID-19 crisis has made strategic communication and visibility essential for business well-being across the world. The public relations (PR) industry, consequently, looks poised to play an even more critical role for clients globally.

Consultancy heads in the Asia Pacific (APAC) region are bullish about the PR market, pegging the predictive score for growth at 7.5 -on an ascending scale of 1 to 10 -head and shoulders over North America (6.6), Eastern Europe (6.3) and even the global average score of 6.4.

Looking forward, profitability in the APAC market is expected to be at 4.6, at par with the global average but down from the 6.7 score of the previous year.

COVID-19 impact

The pandemic, which has caused global economic disruption, has had an impact on the PR industry as well.

Evaluating the impact, 62% leaders shared that cancelled or delayed campaigns was a major fallout of the situation globally along with fewer pitches (46%) and payment delays (38%). At the same time, and not surprisingly, 56% observed an increase in demand for crisis counsel services.

In the APAC region, in particular, crisis counsel, digital/social/online communications and corporate communications have been the most in demand. However, 70% of firms foresee a drop in client income fees.

A heartening data point though, given the challenging global scenario, is that 70% APAC firms claim to have mental health and well-being support mechanisms in place. This is higher than the global average of 52%.

Growth drivers

APAC region firms saw technology, healthcare, and financial and professional services as the biggest growth drivers last year. Technology has been the number one growth sector overall, with United Kingdom (56%), followed by Asia Pacific (51%), witnessing the highest growth from tech businesses.

This is likely to continue with tech innovations shaping every aspect of life and work. In addition, the pandemic has served as a catalyst to push tech businesses into the spotlight as everything from schools to healthcare went online. Well-executed PR interventions can step in to help tech firms drive business growth and profitability and enhance corporate visibility.

For this year, influencer marketing is the most likely area to see an increase in investment from APAC consultancies, followed by research, insight and planning, and social media. This is not far off the mark compared to global expectations of investments in social media and community management (32%), followed by multimedia content creation (31%), influencer marketing (29%), and research, insight and planning (29%).

Firms also foresee clients going **bigger on purpose** to gain a competitive edge and inspire brand loyalty through emotional connect with consumers. According to APAC leaders, the top three social issues clients are most likely to address are **sustainability and climate change, diversity and social inclusion, and healthcare**.

Future trends

Strategic consulting, corporate reputation, and social media and community management remain the expected areas of growth for the next five years and expected sectors of growth during that period are IT and tech, healthcare, and financial and professional services.

In the coming decade, APAC heads see data, measurement and analytics, creativity and research, insight and planning as the most relevant skill sets for PR executives. Meanwhile, data science, predictive AI, SEO, IoT, and augmented and virtual reality are being touted as the most relevant future technologies.

The technology takeover notwithstanding, real-time relationships will still be at the heart of PR. Needs and expectations of the target audience will continue to be the compass for every PR intervention, irrespective of the channel deployed to get the message across, and brands will have to find their unique purpose in this world and consistently lead with it in all their communications.

A TIME TO DEMONSTRATE THE VITAL IMPORTANCE OF PR

Juergen H. Gangoly

CEO, THE SKILLS GROUP, AUSTRIA
EUROPEAN PRESIDENT, ICCO

Analysing the ICCO World Report 2020 once again attests how interconnected and interdependent our world and especially the communications industry is. We didn't need the Coronavirus to recognise that.

Our industry's crisis communications experience and its ability to develop long-term strategies for clients are also proving to be valuable for steering consultancies through the economic downturn.

Despite all, over 60% of our peers in Europe are still optimistic about the future growth of the public relations market, and around 50% expect increased profitability for 2020. Not too bad for a crisis year.

As a result of the crisis, our colleagues all over Europe expect even more pressure on their profit margins. On the other hand, European communications consultancies keep investing in data research and analytics, digital comms and social media.

Our industry's expertise is needed more than ever. We are the ones to moderate between different groups in society and to explain complex issues like healthcare, sustainability and climate change or diversity and social inclusion. This needs quality and a proper set of responsibility, values, and business ethics. The results of the World PR report ask for more guidance and activities in these areas –and for consequences for agencies that do not work up our own high ethical standards. When it comes to us judging practical business ethics in Europe, we still see remarkable differences in the survey's results between Eastern and Western Europe. The time is now to focus on quality and to show that the experts in the communications industry are "substantial workers", not only for our commercial clients but also for our countries, regions, and its institutions.

In this very special year, the results of the World PR report are more than ever a valuable indicator where the "new normal" might lead us in Europe –and about, how we can lead and give guidance to our clients and employees in the challenging years to come.

THE CONNECTING SILVER LINE BETWEEN THE INDUSTRY AND THE FUTURE

We are trained in the communication industry to anticipate the future and pre-emptively prepare for sudden changes and industry shake-ups. Adaptation is a guiding beacon for us, but as well-equipped to incoming crises as we were, nothing could have represented a presentiment for what was to come. In the wake of the pandemic, the world-over woke up to a new way of life, one that few were ready for and even less were coached or possessed the proficient acumen to adapt to with haste.

The public relations sphere continued towards its path of progress. For this year, though the spread of COVID-19 dominated a multitude of conversations and outlooks, presenting an unavoidable banner that industry practitioners had to manage, being future-ready proved to be the primary objective.

The organisations that refined their technical and digital expertise, aligning with the changing requirements of the communication world, were the ones that managed to stay and emerge stronger. Despite giving the pandemic a tough fight, the results of the 2020 ICCO World PR Report state that PR practitioners in the Middle East deem pandemic recovery to be the greatest challenge in the post coronavirus era, with only a polled 13% growth in expected client income fees. However, when asked how optimistic about the growth of the regional public relations market pollsters were, the resulting value was 6 out of a maximum of 10, signifying a hopeful outlook for the upcoming phase.

During the peak of the pandemic when cities went into lockdowns across the globe, PR agencies were looking at non-traditional ways of positioning themselves and their clients in a world defined by crisis and challenges. In fact, PR organisations in the Middle East saw an uptick in and demand for corporate reputation, garnering a score of 6.7 out of 10 from those polled who were asked if CEOs are taking corporate reputation seriously. Technology, on the other hand, was a sector that proved the most buoyant during the pandemic, witnessing the most growth last year (2019) in the Middle East, with all those polled proclaiming that measurement and analytics stand as the defining digital trend at 30%, followed by research, insight and planning at 18%. This trend is likely to continue, with practitioners expecting their firms to invest more in multimedia, social media, and influencer marketing going into 2021.

Looking at how the digital realm surpassed its status from a necessary tool to a fundamental one to maintain sustainability for a business, it is evident that its allocated budgets within agencies will experience a spiking rise. This growth will be accompanied by policies that will be put in place to ensure that any such crises that should arise in the future are dealt with accordingly and pre-emptively with diligence and workable tools in hand. Those polled justifiably regarded data science to be the primary future-prediction technology at 45%, followed by predictive AI at 35%.

Ahmad Itani

CEO AND FOUNDER, CICERO & BERNAY
VICE PRESIDENT, PRCA MENA

The pandemic may have forced instant change that shook the foundations and scaffoldings of many businesses and practitioners, but it has also resulted in a growth of empathy and social responsibility as well as consolidated the imperative position of digital technology integration and know-how as a prerequisite to every agency's strategy. The future looks ever-brighter, and PR organisations are now equipped with even more knowledge and understanding of how to navigate crises of this calibre.

Our sights are no longer set for the coming year but for the coming decade.

ETHICS, POST-COVID: A CANARY IN THE PR COAL MINE?

Mary Beth West, MPRCA

SENIOR STRATEGIST, FLECTHER MARKETING

ICCO BOARD MEMBER

What a difference a year makes.

"Coronavirus Projected to Trigger Worst Economic Downturn Since 1940s" was just one of many dire headlines from The Wall Street Journal in the early North American phase of the pandemic, as the U.S. alone has assumed a new generation's worth of debt burden within the span of mere months.

While annual GDP growth averaged 2.5% from 1990 to 2019, the next 30-year trajectory estimated by the U.S. Congressional Budget Office now anticipates only an average annual U.S. GDP growth of 1.6% from 2020 to 2050 – a daunting economic check on general industrial expectations for annual growth in the coming decades.

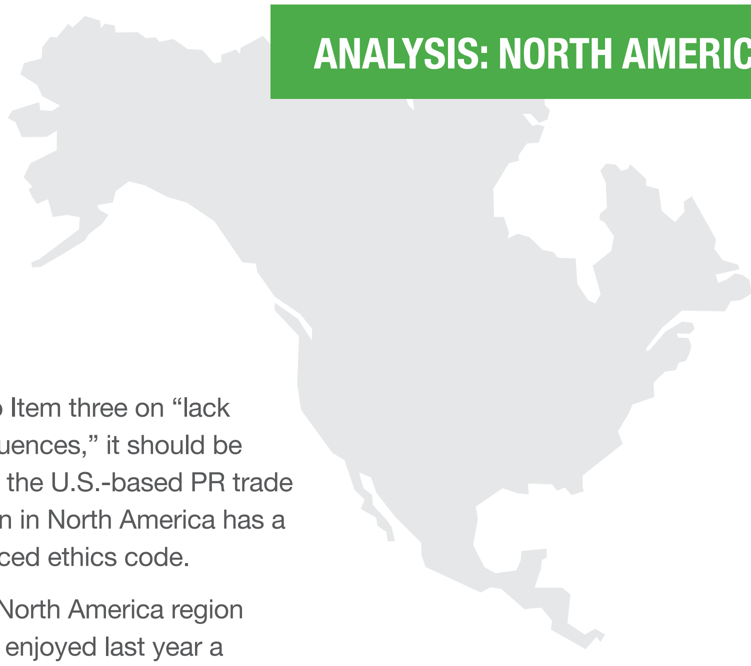
Social, racial, and political unrest and continued urgency surrounding societal changes drive, underscore, and punctuate every aspect of strategic decision-making and communication-crafting in the new era, throughout the region.

As PR agencies look to identify stable niches and low-hanging fruit for revenue-generation and growth amid the chaos, North American ICCO survey respondents for this year's World PR Report indicated that industry sectors proving the "most buoyant" during the pandemic have been 1. Financial and professional services 2.Technology 3. Healthcare.

Respondents expect an increase in PR firms' investment this year in 1. Measurement of communications (unchanged in rank from last year, pre-COVID), 2. Multimedia, and 3. Creativity, reflecting the massive intensification of digital media reliance during COVID as the driving force of strategic communications and all-things-human-connectivity.

Crisis, Ethics and Crisis-of-Ethics: Window of PR Opportunity?

Among the top services for which there has been increased demand during the pandemic, "Crisis Counsel" registered number one by ICCO survey respondents.



As an aside, the North American-based Ethics & Compliance Initiative's (ECI) Global Business Ethics Survey of 180,000 employees across 18 countries recently documented that "employees working in organizations **with four to seven significant changes in 12 months** were **two times as likely to say they observed misconduct** than employees working in an organization without any significant changes."

The level of pandemic-imposed crisis, change, and overall disruption for organisations suggests that high demand for Crisis Counsel services is far from over.

To wit, when this year's ICCO survey asked PR professionals about the biggest ethical challenges for PR professionals and agencies, North American respondents replied:

1. Pressure from clients
2. Balancing agency income/growth with considerations around ethical behaviour / clients
3. Of consequences for agencies that do not behave ethically

Relative to Item three on "lack of consequences," it should be noted that the U.S.-based PR trade association in North America has a **non**-enforced ethics code.

While the North America region previously enjoyed last year a "number one" status compared with all other global regions on the ICCO survey query point of "The PR industry operates ethically," **North America has now lost its No.1 ranking** from last year among all global survey respondents, falling to No. 2, behind Western Europe, in this most recent report.

COVID-19 unleashed a world crisis.

But for organisations universally, resulting ethical fissures may be the canaries in the PR coal mine.

UPSIDE DOWN

Gustavo Averbuj

REGIONAL DIRECTOR LATAM, KETCHUM PR
CHAIRMAN, PRCA LATAM

And one day, in March 2020, all our world changed! When Latam countries went into quarantines, agencies and clients had to leave their offices (many, forever) and start living in the cloud. Some systems' infrastructures were ready for it, some were not. COVID-19 just accelerated some processes. Printed media, that was long suffering from advertising starvation, suddenly stopped printing. Dozens of titles perished. Influencers and the digital environment went through the roof. Industries that were battling to move digitally (like banks and supermarkets) shamelessly crashed, proving that they were not ready at all. Buying online became a staple and logistics were a nightmare. Healthcare (and specifically Coronavirus-related news) ransomed the media agenda for many months.

No surprises then that social media/ community management and multimedia content creation were areas of growth as well as technology and healthcare, or that investments will increase in influencer marketing, social media, and multimedia (and I would add, we will see a diminished investment in "traditional" media relations programs).

As we all stayed home for many months, cooking at home as well as home improvements and decorations also saw a surge in consumer spending, media interest, and in agencies' capabilities.

The pandemic response from Latam countries varied greatly, from denial in Mexico to a defiant Brazil. From the longest quarantine in the world in Argentina to little response from some Central American countries… So government relations and crisis management became more crucial and our surveys reflect that.

Social issues and inequality were also highlighted during this period. Let's remember that more than half of Latin America lives in poverty and that the majority of poor are kids. As it happened all over the world, GDP vanished and the road to recovery became uncertain.

Political turmoil (elections, battles between powers, sparks between neighbouring countries) are unfortunately too common and so social inclusion, sustainability, and climate change (that should be at the top of the political agenda) are not. Unfortunately, too much is said but little is done in these fields. With a few exceptions, corporate statements came up short, as many CSR, sustainability and D&I programs were cut amid huge adjustments made by big organisations to stay afloat.

Somehow, the world has become flatter and our interdependence has become clearer. We are finding the same challenges everywhere from how to create jobs to how to adjust to the new normal. Logistics, digital environment, work from home, transparency, new ways to manage, reconnect with each other, be caring and thoughtful, communicate in new (and sometimes provocative) ways, be creative, are just a few of them.

Our industry is changing as much as the rest. As of March, 2020, population of Latin America and the Caribbean was estimated at more than 652 million. As of 2019, Latin America combined had a nominal GDP of US$5,188,250 million. There's immense importunities with a booming PR, communications and marketing industry ready to grow and overcome the challenging times ahead.

A REMOTE RECOVERY

COVID-19 sits like a black cloud over economies the world over, and the UK is no exception. Businesses focused on technology and healthcare may well have a certain amount of buoyancy, but sectors such as hospitality and travel, leisure and entertainment, retail, automotive and aviation have suffered the greatest damage. This has had an indisputable impact on the PR industry with even the often optimistic leaders of PR agencies recognising that this will impact people and profit. In fact, many leaders, including myself, have had to spend the year making difficult choices.

One of the biggest challenges facing PR agencies is that their staff has -for most of the year –been remotely located with home-based working replacing the traditional office environment almost overnight. While the commute into work has been avoided, the need for proper technology at home and the difficulty in striking the balance between work and personal priorities has presented many challenges. The largest of these challenges as been the impact on the mental health of PR professionals, with many feeling isolated from their colleagues, friends and families, working longer hours with a blurred line between work and home, and spending more time than ever communicating via Zoom –a platform that had little exposure 12 months ago.

Looking after your staff is a priority of any agency and COVID has only served to bring this into ever sharper focus. When all of this is over, a lot about the way that we work will have changed forever, with flexible and remote working being here to stay.

Despite the adversity the pandemic has brought, there will also be opportunities. How businesses have supported their staff and customers during the pandemic has raised the need for investing in a good corporate reputation and valuing strategic consultation. The remote hosting of events, including the UK political party conferences, has created a new market for digital events, as well as an increased demand for digital communications

The long term economic impact of COVID will be difficult to quantify, as a lot of uncertainty remains, making it difficult for businesses to plan ahead. But there is optimism within the PR industry that those agencies who have adjusted to the new ways of working will return to generating the normal profit levels associated with a UK industry which still leads the world in much of its PR work.

Mark Glover, FPRCA

CHIEF EXECUTIVE, NEWINGTON
EXECUTIVE DIRECTOR, SEC NEWGATE
ICCO BOARD MEMBER

How the UK builds back after the pandemic will be critical. We need to ensure that we open up our recruitment as soon as possible, concentrating on increasing diversity and promoting an inclusive workplace, as well as recognising the need to meet sustainability and climate change challenges. It will be challenging, but it is what needs to be done for the industry to thrive once again. And I haven't even mentioned Brexit.

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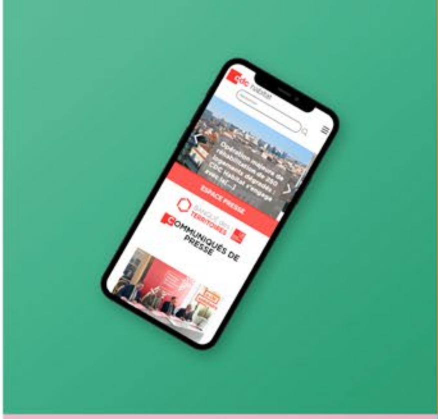

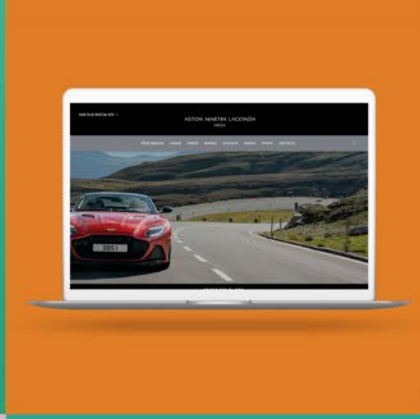

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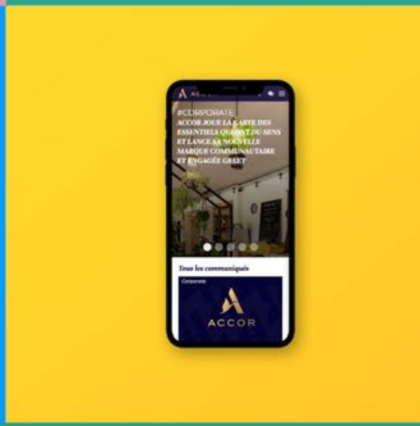

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