PR Agency Rankings 2020

ICCO WORLD PR REPORT 2021-2022

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AGENCY VIEWS OF THE PATH AHEAD

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

NETWORKS ACROSS 70 COUNTRIES

THOUGHT LEADERSHIP AND RESEARCH

20+ INTERNATIONAL EVENTS

100S OF PROFESSIONAL DEVELOPMENT AND LEARNING RESOURCES

INTERNATIONAL MATCHMAKING AND PARTNER DEVELOPMENT

KNOWLEDGE EXCHANGE AND COLLABORATIVE CAMPAIGNS

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WORLD PR REPORT 2021- 2022

Francis Ingham
CHIEF EXECUTIVE, ICCO

Last year's ICCO World PR Report provided a sobering analysis of the impact of Covid on our industry. Encouragingly though, it also reported that PR leaders were confident that having weathered the Covid storm, a road back to growth and profitability was visible.

This report shows that their remarkable confidence was resoundingly correct.

The numbers within this publication are reason for celebration. They show a resurgent industry, growing again, and having proved that its fundamentals were absolutely sound. They also show an industry that continues to have the best of both worlds -old school skills are still heavily in demand, but insight, corporate reputation management, and strategic counsel continue to power ahead.

Against the backdrop of such positive news, it is of course important to be realistic. Challenges of ethics, fake news, talent, mental health and diversity remain.

And sadly, while our industry is recruiting again at scale, there will be practitioners reading this report who lost their job and who are yet to find a new one; agency owners and managers whose agencies didn't make it; people who have been scared mentally by this period. But to them, I would say that I hope the picture painted here provides grounds for optimism about the future.

That's the overview. What about the specifics?

1. There is strong global growth and optimism as the industry recovers

- Overall optimism is notably higher than last year -up from 6.4 out of 10 to 7.3; and above 5 in every world region.
- Expectations of a more profitable year have increased by almost fifty percent. Respondents in every region are positive, compared with respondent in only two regions last year.
- An astonishing 95% expect an increase in client income -compared with only one in five last year.

2. Where is this growth coming from?

- The top 3 growth sectors remain the same as last year, and indeed in the same order. But their salience is growing. So IT and technology is number 1 (67% of respondents saying it is in their top 3 growing sectors, up from 52% last year); healthcare is number 2 (58% up from 41%); and financial and professional services is number 3 (35% up from 22%)
- Addressing the digital needs of clients is more important than ever; and PR agencies continue to provide non-PR services, such as marketing and advertising.
- Agencies are reflecting this growth with own their spending plans. 3 of the top 4 areas PR firms plan to invest in are digital –and ESG is the other big spend item, reflecting the renewed focus in this area of business.

- The top service area is again corporate reputation and is also more pronounced (35% putting it in their top 3, up from 27% last year); with strategic consulting still at number, and increasing its numbers from 26% to 32%. Purpose and CSR work is now the average agency's second biggest growth service area, reflecting presumably how public expectations of corporate behaviour have been transformed, and mirroring the surge in ESG investment too.

3. This increased focus from clients on corporate reputation can also be seen in other areas of the report

- Companies in every region of the world are paying more attention to corporate purpose than ever before.
- CEOs taking corporate reputation seriously is up to a record high.
- Strategic consulting is the number one skill requirement for future PR executives.
- Corporate reputation is also now reported as being the most important PR objective for clients.

4. Measurement and evaluation sophistication continues to increase

- Awareness of, and use of AMEC tools has never been higher.
- While AVEs are alive still, their extinction continues.
- Clients are increasing requesting more varied measurement methods, such as engagement metrics and sentiment metrics.
- All of this backs up our industry's move to more and more strategic work, and is testimony to the success and dedication of AMEC's leadership team over the years.

5. Tech remains a golden opportunity.

- AI retains its place as the most important technology for PR businesses in the future.
- Agencies are using tech and digital to operate more efficiently and to improve employee engagement, as well as to build online communities for their clients. It's all part of the industry's evolution.

6. Five critical challenges are discernible

- Retaining talent is the number one challenge faced by agency leaders, with basically no change in the number saying that we are good at recruiting people from outside of the industry.
- A majority of respondents say that identifying fake news is a problem.
- While two of three say that PR is ethical, a significant minority disagree.
- There is basically no change in PR reflecting the diversity of society.
- And finally, offering mental health support to staff is still not the default position -a fact which is shameful given how many practitioners have suffered to keep their companies viable.

So. Plenty to digest, and plenty of challenges to face. But this is such as a positive and encouraging report. If we think back to when Covid first hit each of our countries, such a remarkable recovery would have seemed literally unbelievable. But our industry is roaring back, and the good times are with us once more.

OPINIUM SUMMARY

A TECHNOLOGY DRIVEN FUTURE AHEAD FOR THE WORLD OF PR

James Endersby

CHIEF EXECUTIVE

OPINIUM

We are proud to be partnering with ICCO on the World PR Report for a third year. Our research and insights provide PR leaders, movers and shakers, the strategic know-how to overcome foreseeable challenges and make the most of opportunities and successfully position themselves as a value asset, for clients, competitors, potential partners and future employees alike.

2021 has been a year of success for many within the PR industry, and over half are expecting to close off the year with growth in client income fees (52%), which is a stark contrast from last year in the midst of the Coronavirus Pandemic where 61% were expecting a drop. Furthermore, there has been some positives coming out of the pandemic for PR firms across the globe, with two in five seeing it bring about new opportunities (39%) and a quarter experiencing increased business (24%) as a result.

The influence of tech and digital trends continues to grow and permeate all aspects of the PR world.

Looking past the effects of the pandemic, the global PR industry continues to see a growing shift towards a deeper immersion into the digital, tech and social media world.

Many PR companies are expecting to invest more heavily in social media management (45%) and multimedia content creation (32%), and are expecting to see growth in the IT and Technology sector (67%) above all others. However, the PR industry could be left behind if it doesn't keep up with these trends as currently professionals rate the PR industry's adoption of new technology only a 6 out of 10, which is just above average. More specifically, it will be well worth keeping up with innovation in AI and Data Science as these are expected to be ever more relevant to the world of PR in the years to come (53% and 40% respectively).

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 Media

Global PR Agency Rankings 2020

PROVOKE TOP 250 RANKINGS

2021 RANK	2020 RANK	AGENCY	HQ	FEE INCOME 2020 ($)	FEE INCOME 2019 ($)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
1	1	Edelman	USA	840,022,000	892,039,000	5,703	-5.8%	-5.8%
2	2	Weber Shandwick	USA	820,000,000	865,000,000		-5.2%	-5.2%
3	3	BCW	USA	715,000,000	740,000,000		-3.4%	-3.4%
4	4	FleishmanHillard	USA	615,000,000	605,000,000		1.7%	1.7%
5	5	Ketchum	USA	500,000,000	535,000,000		-6.5%	-6.5%
6	10	Brunswick	UK	367,160,000	335,280,000	1,200	9.5%	5.5%
7	6	MSL	France	365,000,000	365,000,000	2,110	0.0%	0.0%
8	9	BlueFocus	China	363,988,458	329,123,818	5,058	10.6%	4.1%
9	15	Real Chemistry	USA	360,000,000	222,000,000	1,519	62.2%	62.2%
10	7	Hill+Knowlton Strategies	USA	345,000,000	360,000,000		-4.2%	-4.2%
11	8	Ogilvy	USA	337,000,000	345,000,000		-2.3%	-2.3%
12	12	Golin	USA	252,000,000	252,000,000		0.0%	0.0%
13	17	ICF Next	USA	232,770,338	258,775,242	1,280	-10.0%	-10.0%
14	13	FTI Consulting	USA	228,712,000	243,000,000	770	-5.9%	-5.9%
15	14	Havas PR Global Collective	France	225,000,000	225,000,000	1,350	0.0%	0.0%
16	22	Finsbury Glover Hering	UK	221,000,000	221,000,000	708	0.0%	0.0%
17	11	MC Group	Germany	217,455,000	274,618,124	1,085	-20.8%	-20.8%
18	16	Vector Inc.	Japan	214,600,000	219,500,000	1,064	-2.2%	-2.2%
19	19	Teneo Holdings	UK	170,000,000	145,000,000	850	17.2%	17.2%
20	20	WE Communications	USA	149,100,000	143,500,000	1,126	3.9%	3.9%
21	21	APCO Worldwide	USA	142,960,000	142,262,200	799	0.5%	0.5%
22	18	Sunny Side Up Inc	Japan	113,668,709	148,009,233	344	-23.2%	-23.2%
23	24	Syneos Health	USA	110,000,000	110,000,000	337	0.0%	0.0%
24	23	Finn Partners	USA	108,897,017	119,321,160	720	-8.7%	-8.7%
25	27	ICR	USA	106,000,000	88,000,000	260	20.5%	20.5%
26	24	Porter Novelli	USA	103,000,000	110,000,000		-6.4%	-6.4%
27	29	GCI Health	USA	102,500,000	80,000,000	440	28.1%	28.1%
28	26	FischerAppelt	Germany	96,382,440	92,624,000	676	4.1%	-4.5%
29	30	SEC Newgate	Italy	96,351,773	79,501,533	638	21.2%	21.2%
30	33	Ruder Finn	USA	87,775,000	78,000,000	732	12.5%	12.5%
31	31	Zeno Group	USA	85,994,010	79,269,860	513	8.5%	8.5%
32	37	SKD Knickerbocker	USA	85,000,000	62,000,000	168	37.1%	37.1%
33	28	Allison+Partners	USA	78,700,000	80,800,000	539	-2.6%	-2.6%
34	34	Marina Maher Communications	USA	69,000,000	77,000,000	181	-10.4%	-10.4%
35	32	Hopscotch Groupe	France	67,832,000	78,736,000	700	-13.8%	-20.9%
36	35	Freuds	UK	63,526,900	68,603,461	270	-7.4%	-10.8%
37	40	Prosek Partners	USA	62,000,000	58,200,000	225	6.5%	6.5%
38	41	Lewis	UK	61,650,000	56,760,000	370	8.6%	4.7%
39	38	Archetype	USA	56,000,000	60,000,000	600	-6.7%	-6.7%
40	76	Serviceplan PR Group	Germany	52,826,000	32,121,600	304	64.5%	51.0%
41	43	DKC Public Relations	USA	52,250,000	55,000,000	225	-5.0%	-5.0%
42	46	Grayling	UK	50,964,000	50,688,000	490	0.5%	-3.1%
43	38	R&CPMK	USA	50,000,000	55,000,000	325	-9.1%	-9.1%
43	52	Portland Communications	UK	50,000,000	45,000,000	255	11.1%	11.1%
45	45	Kyodo Public Relations	Japan	49,900,000	51,813,000	245	-3.7%	-13.3%
46	48	LLYC	Spain	48,919,870	48,221,000	600	1.4%	1.4%
47	36	FSB Comunicacoes	Brazil	48,552,700	63,366,555	471	-23.4%	-23.4%
48	44	H&H Group	Sweden	47,000,000	52,000,000	410	-9.6%	-9.6%
49	50	Dentsu Public Relations	Japan	46,000,000	46,000,000	292	0.0%	0.0%
50	47	Joele Frank	USA	45,000,000	50,000,000	120	-10.0%	-10.0%

PROVOKE TOP 250 RANKINGS

2021 RANK	2020 RANK	AGENCY	HQ	FEE INCOME 2020 ($)	FEE INCOME 2019 ($)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
51	n/a	Bully Pulpit Interactive	USA	43,637,000	30,195,000	136	44.5%	44.5%
52	54	M Booth	USA	43,328,936	43,966,721	208	-1.5%	-1.5%
53	52	SJR	USA	43,000,000	45,000,000	180	-4.4%	-4.4%
54	56	Kreab	UK/Sweden	42,700,000	42,560,000	400	0.3%	-7.9%
55	57	Hotwire	UK	41,748,611	42,161,713	258	-1.0%	-1.0%
56	127	Ashfield Health	UK	41,648,000	36,828,000	246	13.1%	9.0%
57	62	5W Public Relations	USA	40,932,143	36,351,814	169	12.6%	12.6%
58	81	Farner Consulting	Switzerland	40,073,667	29,395,162	173	36.3%	25.2%
59	58	National PR	Canada	40,000,000	42,000,000		-4.8%	-4.8%
60	55	MWWPR	USA	38,878,161	42,741,686	160	-9.0%	-9.0%
61	49	Instinctif Partners	UK	38,360,000	46,200,000	268	-17.0%	-20.0%
62	70	Global Strategy Group	USA	38,000,000	34,000,000	105	11.8%	11.8%
63	69	Engine MHP + Mischief	UK	37,949,000	34,848,000	190	8.9%	4.9%
64	78	Danger!	Germany	37,234,400	31,158,400	194	19.5%	9.7%
64	79	achtung!	Germany	37,234,400	30,828,000	194	20.8%	10.9%
66	72	Imre	USA	36,739,100	33,334,000	185	10.2%	10.2%
67	51	Four Communications Group	UK	36,706,816	45,003,095	310	-18.4%	-21.4%
68	64	PRAP Japan	Japan	36,000,000	36,000,000	273	0.0%	0.0%
69	60	Padilla	USA	35,862,295	37,327,206	613	-3.9%	-3.9%
70	66	Adfactors PR	India	35,227,253	35,637,572	820	-1.2%	-1.2%
71	61	The Outcast Agency	USA	35,000,000	36,700,000		-4.6%	-4.6%
71	64	Carmichael Lynch Relate	USA	35,000,000	36,000,000		-2.8%	-2.8%
73	63	Prain Global	Korea	34,127,832	36,210,555	219	-5.8%	-5.8%
74	86	Rud Pedersen	Sweden	34,120,000	25,816,649	211	32.2%	32.2%
75	67	CYTS-LINKAGE	China	34,000,000	35,480,000	254	-4.2%	-4.2%
76	73	Kivvit	USA	33,900,808	33,049,315	103	2.6%	2.6%
77	75	French/West/Vaughan	USA	33,159,488	32,509,302	122	2.0%	2.0%
78	71	Spectrum Science	USA	33,000,000	33,900,000	120	-2.7%	-2.7%
79	88	Gullers Grupp	Sweden	32,939,160	27,863,110	228	18.2%	8.4%
80	59	Grupo Inpress	Brazil	32,048,623	39,621,750	584	-19.1%	6.4%
81	68	DeVries Global	USA	32,000,000	35,000,000	207	-8.6%	-8.6%
82	104	Current Global	USA	31,866,000	21,150,000	185	50.7%	50.7%
83	94	Hunter Public Relations	USA	31,700,000	24,300,000	161	30.5%	30.5%
84	n/a	Pomilio Blumm	Italy	31,110,000	31,920,000	142	-2.5%	-10.5%
85	89	Evoke Kyne	Ireland	30,984,000	25,149,453	139	23.2%	23.2%
86	84	Hanover	UK	30,003,000	26,897,785	171	11.5%	7.5%
87	92	Crosby	USA	29,092,172	24,534,990	99	18.6%	18.6%
88	97	PR One	South Korea	28,879,567	22,577,855	180	27.9%	27.9%
89	77	Coyne PR	USA	28,000,000	32,000,000	139	-12.5%	-12.5%
90	98	Faktor 3	Germany	27,450,000	22,551,200	240	21.7%	11.7%
91	85	ATREVIA	Spain	26,840,000	26,572,159	398	1.0%	-7.3%
92	80	G&S Business Communications	USA	25,111,105	30,733,412	142	-18.3%	-18.3%
93	82	Fahlgren Mortine	USA	24,991,701	29,504,384	163	-15.3%	-15.3%
94	n/a	Oliver Schrott Kommunikation	Germany	24,790,400	31,136,000	215	-20.4%	-26.9%
95	90	Casbah Group	UK	24,249,000	24,881,884	206	-2.5%	-6.1%
96	95	M&C Saatchi Sport & Entertainment	UK	24,192,830	23,892,000	164	1.3%	-2.4%
97	110	Highwire	USA	24,163,050	19,595,186	87	23.3%	23.3%
98	101	Day One Agency	USA	23,806,648	21,410,269	95	11.2%	11.2%
99	99	PAN Communications	USA	23,539,021	22,493,586	126	4.6%	4.6%
100	74	Citizen Relations	USA	23,410,631	32,577,578	152	-28.1%	-28.1%

PRovoke Media

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101	115	Precision	USA	23,354,375	18,057,133	85	29.3%	29.3%
102	87	Havas Formula	USA	22,673,654	25,630,379	118	-11.5%	-11.5%
103	100	Sopexa	France	22,570,000	22,400,000	211	0.8%	-7.5%
104	n/a	Matter Communications	USA	22,500,000	23,000,000	167	-2.2%	-2.2%
105	116	Headland Consultancy	UK	22,297,493	17,859,320	91	24.9%	20.3%
106	93	Strategic Public Relations Group	Hong Kong	21,630,000	24,530,000	225	-11.8%	-11.8%
107	83	Citigate Dewe Rogerson	UK	21,372,000	29,040,000		-26.4%	-29.1%
108	108	Walker Sands	USA	21,258,121	19,982,208	136	6.4%	6.4%
109	103	Brands2Life	UK	20,969,093	21,118,900	142	-0.7%	-0.7%
110	91	Jackson Spalding	USA	20,881,110	24,844,375	103	-16.0%	-16.0%
111	106	Barabino & Partners	Italy	20,740,000	20,384,000	105	1.7%	-6.6%
112	111	Mikhailov & Partners	Russia	19,962,481	19,132,172	244	4.3%	19.2%
113	107	Taylor	USA	19,700,000	20,200,000	90	-2.5%	-2.5%
114	144	Faktenkontor	Germany	19,629,800	12,992,000	140	51.1%	38.7%
115	123	Proof Strategies	Canada	19,365,894	16,008,088	130	21.0%	13.2%
116	105	InkHouse	USA	18,800,000	20,400,000	125	-7.8%	-7.8%
117	96	Premier	UK	18,697,760	23,628,000	111	-20.9%	-23.8%
118	113	V+O	Greece	18,644,289	17,592,324	171	6.0%	-2.7%
119	131	ORCA Agenturgruppe	Germany	18,324,400	14,784,000	102	23.9%	13.8%
120	102	Praytell	USA	18,000,000	21,200,000	133	-15.1%	-15.1%
120	n/a	Regan	USA	18,000,000	17,300,000	101	4.0%	4.0%
122	109	Geelmuyden.Kiese Group	Norway	17,550,000	19,720,000	145	-11.0%	-11.8%
123	117	Levick Strategic Communications	USA	17,000,000	17,000,000	70	0.0%	0.0%
124	118	The Red Consultancy	UK	16,988,000	16,896,000	126	0.5%	-3.1%
125	129	Interel	Belgium	16,529,780	15,060,640	114	9.8%	0.8%
126	112	LaunchSquad	USA	16,376,510	18,602,375	117	-12.0%	-12.0%
127	133	W	UK	15,481,000	13,464,000	99	15.0%	10.8%
128	n/a	The Zimmerman Agency	USA	15,400,000	15,400,000	46	0.0%	0.0%
129	122	Lansons	UK	15,154,248	16,025,125	98	-5.4%	-8.9%
130	130	The Hoffman Agency	USA	15,115,000	15,018,000	160	0.6%	0.6%
131	119	Mission North	USA	15,000,000	16,500,000	75	-9.1%	-9.1%
131	160	Kwittken	USA	15,000,000	11,000,000	70	36.4%	36.4%
133	141	Powerscourt	UK	14,933,000	11,919,600	49	25.3%	20.7%
134	177	JPA Health Communications	USA	14,848,067	10,305,362	75	44.1%	44.1%
135	137	Method Communications	USA	14,761,362	13,498,800	69	9.4%	9.4%
136	124	DNA Communications	USA	14,500,000	16,000,000	100	-9.4%	-9.4%
137	121	rbb Communications	USA	14,496,676	16,051,825	82	-9.7%	-9.7%
138	120	M Booth Health	USA	14,433,794	16,582,440	43	-13.0%	-13.0%
139	149	Marathon Strategies	USA	14,391,080	12,604,467	39	14.2%	14.2%
140	140	Bliss Integrated Communications	USA	14,000,000	13,250,000	57	5.7%	5.7%
141	174	JIN	France	13,786,000	10,416,000	80	32.4%	21.5%
142	147	KPR & Associates	South Korea	13,738,642	12,390,004	111	10.9%	10.9%
143	n/a	No Fixed Address	Canada	13,650,000	10,037,500	60	36.0%	27.3%
144	135	Spark	USA	13,500,000	14,000,000	60	-3.6%	-3.6%
145	138	Wellcom	France	13,420,000	13,440,000	120	-0.1%	-8.3%
146	166	CROS	Russia	13,324,000	10,810,090	151	23.3%	23.3%
147	126	Shift Communications	USA	13,100,000	15,884,974	62	-17.5%	-17.5%
148	150	RF|Binder	USA	12,900,000	12,000,000	55	7.5%	7.5%
149	159	C+C	USA	12,728,303	11,055,642	74	15.1%	15.1%
150	142	LaForce	United States	12,628,764	13,064,376	81	-3.3%	-3.3%

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2021 RANK	2020 RANK	AGENCY	HQ	FEE INCOME 2020 ($)	FEE INCOME 2019 ($)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
151	168	Argyle	Canada	12,589,521	10,582,591	92	19.0%	11.3%
152	190	Vested	USA	12,400,000	9,236,000	30	34.3%	34.3%
153	155	Citypress	UK	12,330,000	11,401,041	84	8.1%	4.2%
154	157	F&H Communications	Germany	12,322,000	11,312,000	92	8.9%	0.0%
155	n/a	Markenzeichen	Germany	12,285,400	10,113,600	74	21.5%	11.5%
156	139	JeffreyGroup	USA	12,210,949	13,310,186	233	-8.3%	-8.3%
157	202	Tact Intelligence-conseil	Canada	12,126,000	10,234,000	81	18.5%	18.5%
158	114	Racepoint Global	USA	12,000,000	18,333,000	57	-34.5%	-34.5%
158	146	Jarrard Phillips Cate & Hancock	USA	12,000,000	12,416,807	43	-3.4%	-3.4%
160	152	Davies	USA	11,750,000	11,730,000	34	0.2%	0.2%
161	143	Exponent PR	USA	11,700,500	13,000,000	47	-10.0%	-10.0%
162	151	First House	Norway	11,590,000	11,873,120	35	-2.4%	-10.4%
163	n/a	Palmer Hargreaves	Germany	11,297,200	9,486,400	140	19.1%	9.3%
164	160	Diplomat Group	Sweden	11,040,000	11,000,000	110	0.4%	-8.0%
165	154	Hope&Glory	UK	10,982,358	10,808,160	80	1.6%	-2.1%
166	128	TRACCS	Saudi Arabia	10,830,000	15,400,000	200	-29.7%	-29.7%
167	156	Gregory FCA	USA	10,800,000	11,400,000	79	-5.3%	-5.3%
168	171	Action Global Communications	Cyprus	10,700,000	10,500,000	187	1.9%	1.9%
169	200	BECG	UK	10,686,000	8,580,000	77	24.5%	20.0%
170	169	Lambert	USA	10,647,000	10,570,000	74	0.7%	29.1%
171	158	Marco	Spain	10,634,042	11,144,796	115	-4.6%	-12.4%
172	135	Axon Communications	UK	10,500,000	14,000,000	74	-25.0%	-25.0%
173	188	Narva	Sweden	10,452,000	9,383,000	57	11.4%	2.1%
174	167	Lift World	Portugal	10,370,000	10,594,715	114	-2.1%	-10.1%
175	182	Harvard	UK	10,343,500	9,795,720	81	5.6%	1.7%
176	153	Mower	United States	10,265,655	11,655,290	35	-11.9%	-11.9%
177	184	LDWW	USA	10,256,718	9,568,620	44	7.2%	7.2%
178	180	furrerhugi.	Switzerland	10,126,000	9,968,000	38	1.6%	-6.7%
179	171	GoodIdea Media	China	10,000,000	10,500,000	100	-4.8%	-4.8%
180	185	MP&F Public Relations	USA	9,931,000	9,490,000	72	4.6%	4.6%
181	148	Haebmau	Germany	9,882,000	12,320,000	125	-19.8%	-26.4%
182	165	90TEN	UK	9,857,749	10,912,188	65	-9.7%	-13.0%
183	181	LVT Group	Netherlands	9,760,000	9,915,930	75	-1.6%	-9.6%
184	160	DCI	USA	9,500,000	11,000,000	55	-13.6%	-13.6%
184	171	Veritas	Canada	9,500,000	10,500,000	55	-9.5%	-9.5%
186	197	Moore	USA	9,462,495	8,817,078	46	7.3%	7.3%
187	134	Mitchell	USA	9,127,102	11,015,996	37	-17.1%	-17.1%
188	n/a	J Public Relations	USA	9,100,000	11,300,000	53	-19.5%	-19.5%
189	209	komm.passion	Germany	9,089,000	7,840,000	64	15.9%	6.4%
190	170	Good Relations	UK	9,042,000	10,560,000	60	-14.4%	-17.5%
190	201	Threepipe Communications	UK	9,042,000	8,276,400	87	9.3%	5.3%
192	236	Clarity PR	USA	9,035,115	6,144,412	65	47.0%	47.0%
193	n/a	Thrive PR & Communications	Australia	8,704,381	5,668,430	63	53.6%	34.4%
194	189	Grupo CDI	Brazil	8,700,000	9,290,000	200	-6.4%	-6.4%
195	225	Octopus Group	UK	8,631,000	8,178,720	58	5.5%	1.7%
196	176	360PR+	USA	8,575,221	10,326,547	51	-17.0%	-17.0%
197	187	Max Borges Agency	USA	8,500,000	9,404,384	49	-9.6%	-9.6%
198	199	Another	Mexico	8,479,214	8,725,502	171	-2.8%	-2.8%
199	145	Apple Tree Communications	Spain	8,416,475	12,710,880	80	-33.8%	-39.2%
200	192	Peppercomm	USA	8,313,000	9,000,000	29	-7.6%	-7.6%

PROVOKE TOP 250 RANKINGS

2021 RANK	2020 RANK	AGENCY	HQ	FEE INCOME 2020 ($)	FEE INCOME 2019 ($)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
201	191	Hot Paper Lantern	USA	8,260,000	9,076,690	35	-9.0%	-9.0%
202	226	Aspectus	UK	8,220,000	6,600,000	58	24.5%	20.0%
203	164	MMGY NJF	USA	8,203,073	10,949,994	60	-25.1%	-25.1%
204	198	Greentarget	USA	8,184,000	8,765,100	39	-6.6%	-6.6%
205	220	Monet + Associes	France	8,161,800	6,787,200	68	20.3%	10.4%
206	232	Sam Brown	USA	8,000,000	6,341,946	51	26.1%	26.1%
207	231	Piabo PR	Germany	7,991,439	6,332,985	44	26.2%	15.8%
208	219	PLMR	UK	7,981,987	6,884,494	48	15.9%	11.7%
209	218	Segmenta Communications	Germany	7,978,800	6,899,200	83	n/a	n/a
210	195	SenateSHJ	New Zealand	7,973,000	9,106,000	33	-12.4%	-12.4%
211	226	Madano Partnership	UK	7,946,000	6,600,000	38	20.4%	16.0%
212	207	EMG	The Netherlands	7,930,000	8,018,080	43	-1.1%	-9.2%
213	224	Kaltwasser Kommunikation	Germany	7,917,800	6,675,200	55	18.6%	8.9%
214	196	Infinite Global	USA	7,635,093	8,857,808	47	-13.8%	-13.8%
215	223	Pierpont Communications	USA	7,606,648	7,643,412	32	n/a	n/a
216	328	Pretty Green Things	UK	7,569,250	6,870,600	31	10.2%	6.1%
217	178	M&C Saatchi Talk	UK	7,511,988	10,818,432	64	-30.6%	-33.1%
218	192	Merritt Group	USA	7,500,000	7,500,000	35	0.0%	0.0%
218	n/a	Stanton	USA	7,500,000	6,900,000	26	8.7%	8.7%
220	203	Nelson Bostock Unlimited	UK	7,398,000	8,226,240	60	-10.1%	-13.4%
221	205	Lou Hammond Group	USA	7,350,509	8,100,000	40	-9.3%	-9.3%
222	212	Thomas Marko & Associes	France	7,320,000	7,280,000	36	0.5%	-7.7%
222	215	AMI Communications	Czech Republic	7,320,000	7,168,000	85	2.1%	-6.3%
224	237	CP/compartner	Germany	7,124,800	6,003,200	68	18.7%	9.0%
225	228	Evercom	Spain	7,100,400	6,484,800	65	9.5%	0.5%
226	n/a	Icon Agency	Australia	7,030,493	4,860,976	58	44.6%	26.6%
227	240	Navos	Germany	7,015,000	5,980,800	55	17.3%	7.7%
228	206	Sassy	UK	6,970,560	8,074,943	30	-13.7%	-16.8%
229	213	Kirchhoff Consult	Germany	6,898,934	6,730,080	52	2.5%	-5.9%
230	230	Red Lorry Yellow Lorry	UK	6,850,000	6,468,000	28	5.9%	2.0%
231	244	Cannings Purple	Australia	6,800,000	5,854,309	42	16.2%	1.6%
232	241	Bospar	USA	6,785,878	5,825,852	37	16.5%	16.5%
233	243	LoeschHundLiepold Kommunikation	Germany	6,734,400	5,880,000	50	14.5%	5.1%
234	210	Frank	UK	6,652,220	7,796,160	41	-14.7%	-17.8%
235	211	Fink & Fuchs	Germany	6,542,607	7,366,834	67	-11.2%	-18.5%
236	259	Whyte Corporate Affairs	Belgium	6,446,480	5,154,240	31	25.1%	14.8%
237	233	Dukas Linden Public Relations	USA	6,400,000	6,318,683	24	1.3%	1.3%
238	319	Taylor Herring	UK	6,302,000	5,280,000	25	19.4%	15.0%
239	204	A&B Communications Group	Germany	6,222,000	8,120,000	44	-23.4%	-29.7%
240	221	Klenk & Hoursch	Germany	6,087,800	6,720,000	52	-9.4%	-16.8%
241	247	The Academy	UK	6,069,100	5,808,000	50	4.5%	0.7%
242	160	Murphy O'Brien	USA	5,920,000	11,000,000	37	n/a	n/a
243	208	Rasky Partners	USA	5,900,000	8,000,000	22	-26.3%	-26.3%
243	242	The Bulleit Group	USA	5,900,000	5,890,700	30	0.2%	0.2%
245	287	Manifest	UK	5,891,000	5,544,000	38	6.3%	2.4%
246	250	Trigger Oslo	Norway	5,856,000	5,600,000	45	4.6%	-4.0%
247	n/a	Sachs Media	USA	5,809,668	5,154,512	34	12.7%	12.7%
248	n/a	Berk Communications	USA	5,707,363	4,306,145	24	32.5%	32.5%
249	217	Approach	Brazil	5,700,000	6,919,947	161	-17.6%	8.4%
250	254	Singer Associates	USA	5,682,442	5,483,657	19	3.6%	3.6%

GLOBAL RESULTS

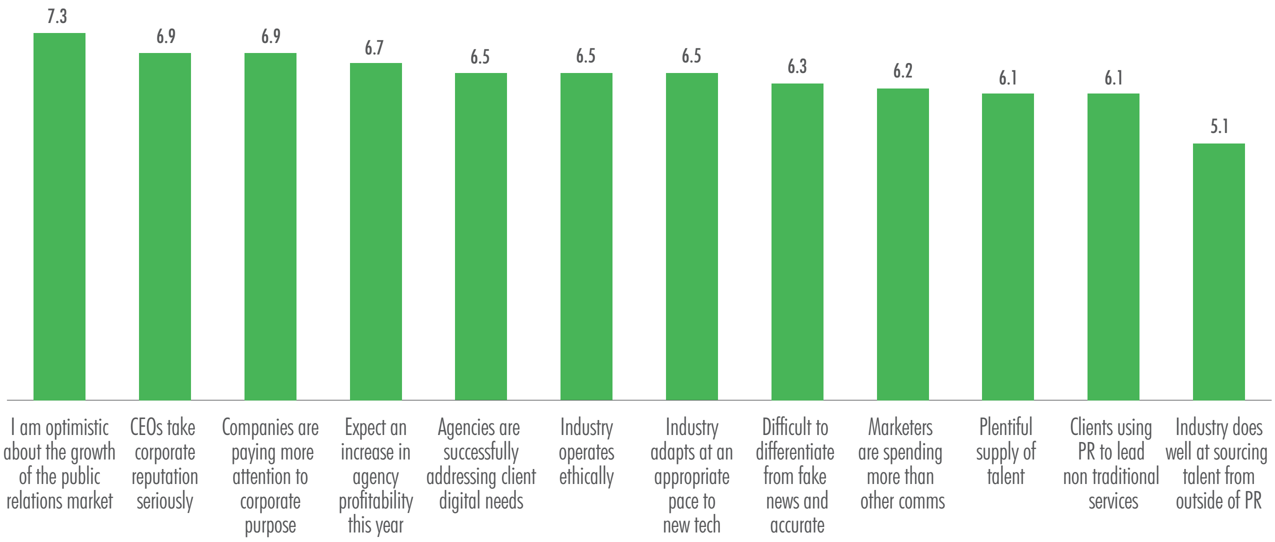
These results are based on findings from an online survey conducted between August and September 2020.

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

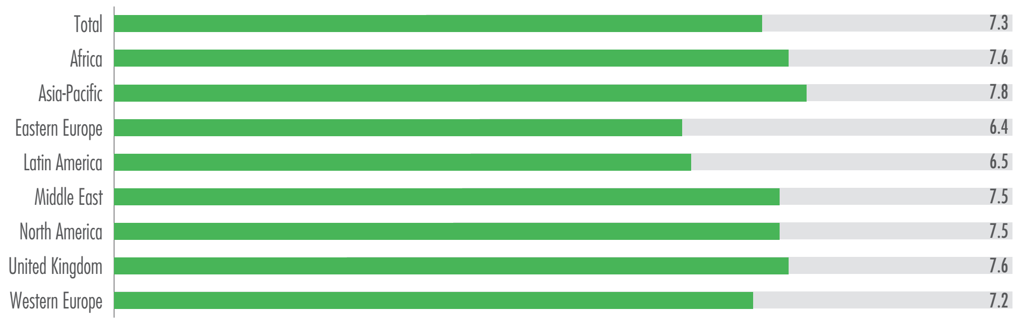
Perceived growth and opportunity



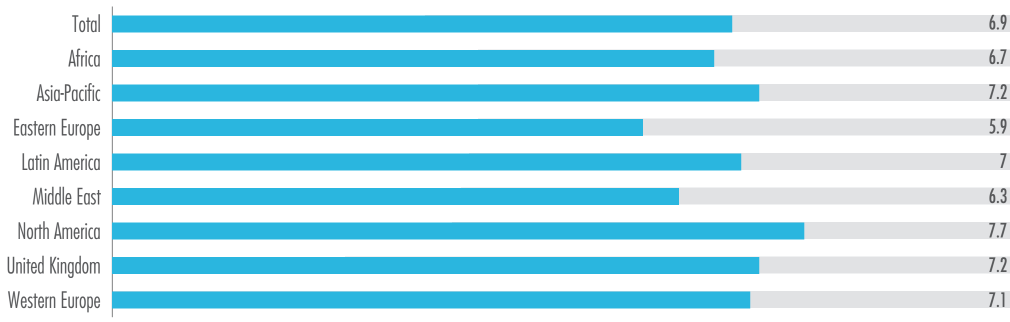
Base: All who work in PR (260)Q1.
"Tell us how much you agree with these statements on a scale of 1 to 10, where 1 = strong disagreement and 10 = strong agreement."

Average levels of agreement on a 10 point scale

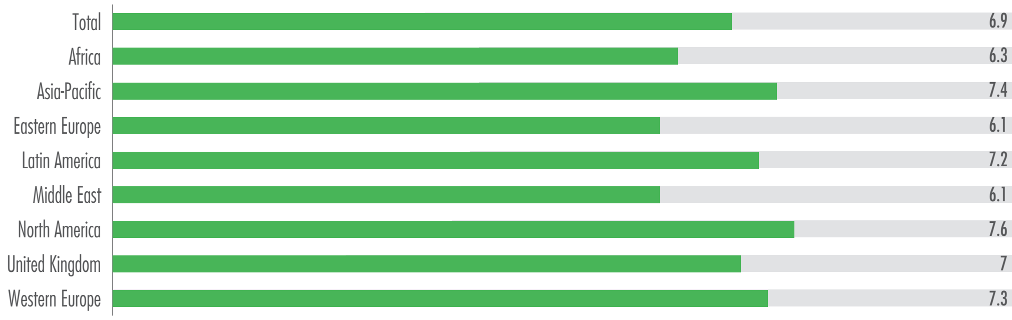
I am optimistic about the growth of the public relations market



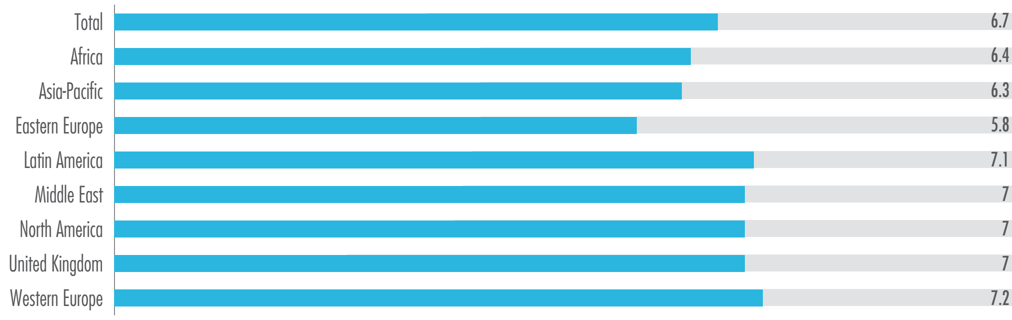
Expect an increase in agency profitability this year



Companies are paying more attention to corporate purpose



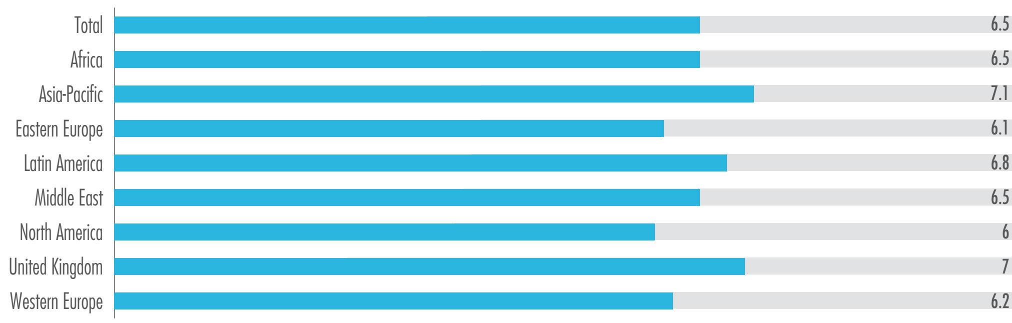
Expect an increase in agency profitability this year



PR agencies are successfully addressing client digital needs

The PR industry operates ethically

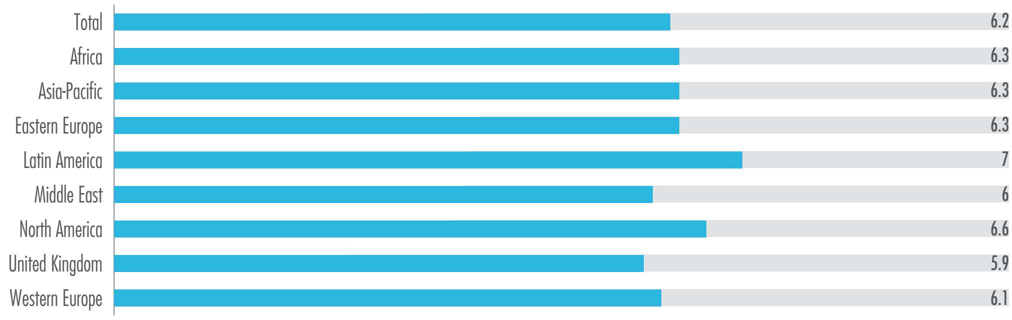
The PR industry is adapting to new technologies at an appropriate pace



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'

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

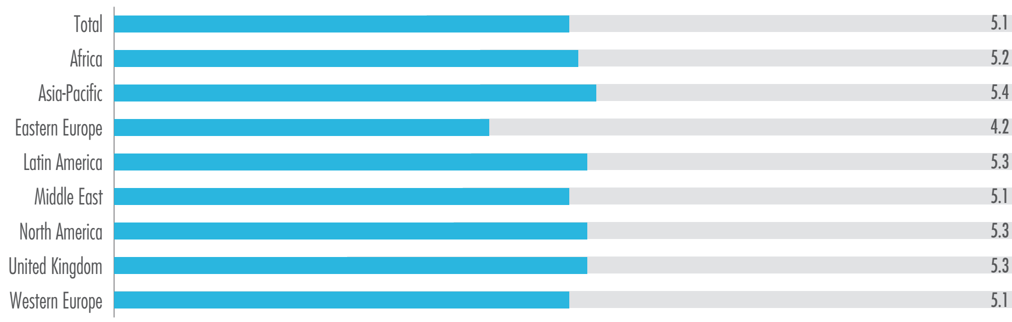
Marketers are spending more money in comparison to other communications disciplines



There is a plentiful supply of talent

Clients are willing to turn to public relations firms to lead non-traditional services

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



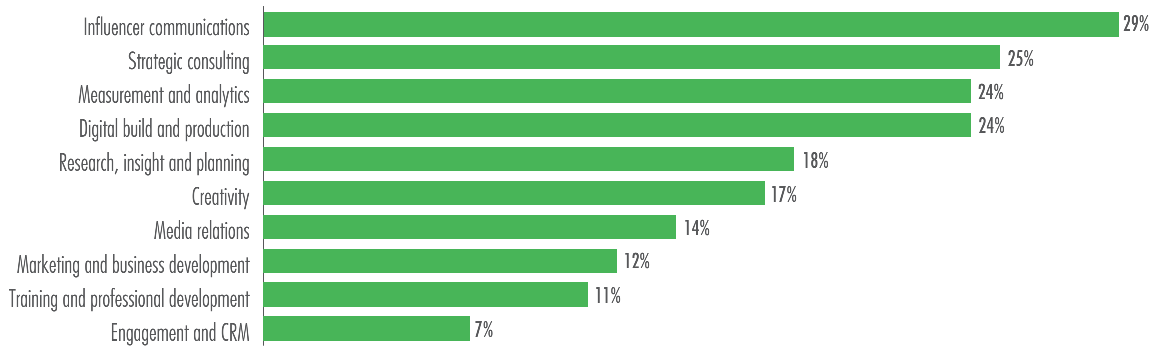
Participants indicated how much they agreed with each statements, in relation to their market, on a scale of 1 to 10, where 1 = strong disagreement and 10 = strong agreement'

Expected areas of investment

Social media community management 45%

ESG 32%

Multimedia content creation 32%

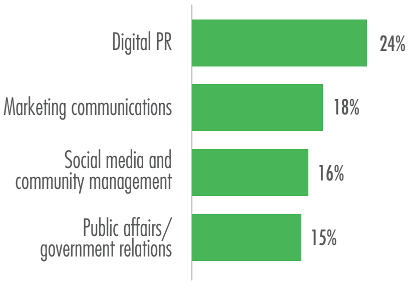


Expected decline or growth in organisation

Areas of growth - last year

Corporate reputation 27%

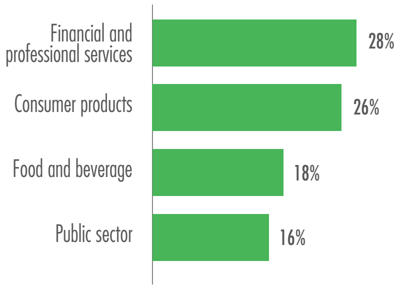
Strategic consulting 26%



Sectors of growth - last year

Technology 52%

Healthcare 41%



Expected areas of growth over the next five years

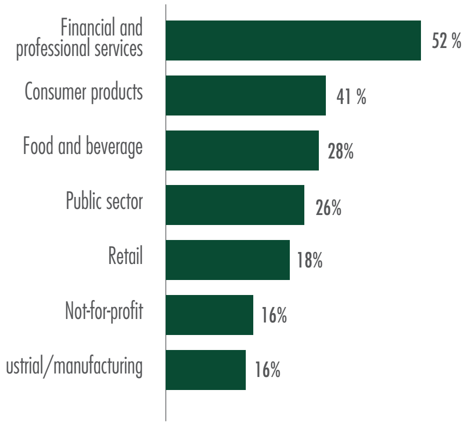
Corporate reputation 35%

Purpose and CSR 35%

Expected sectors of growth over the next five years

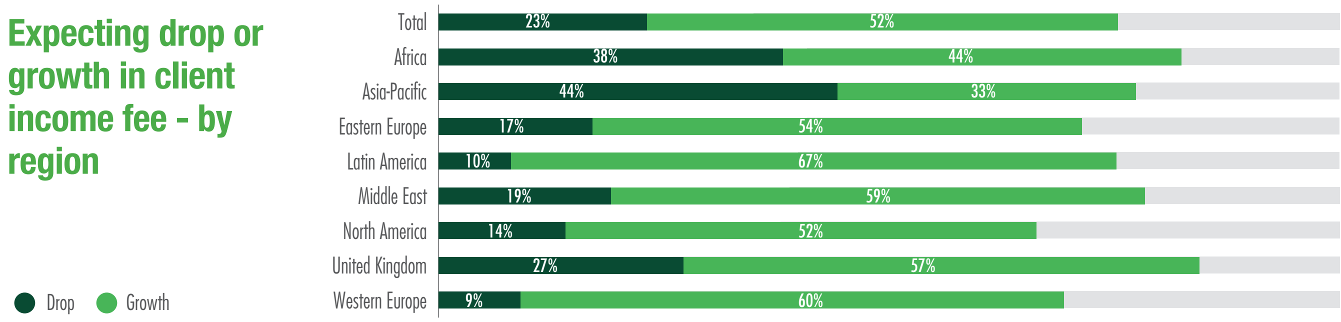
IT and technology 67%

Healthcare 58%

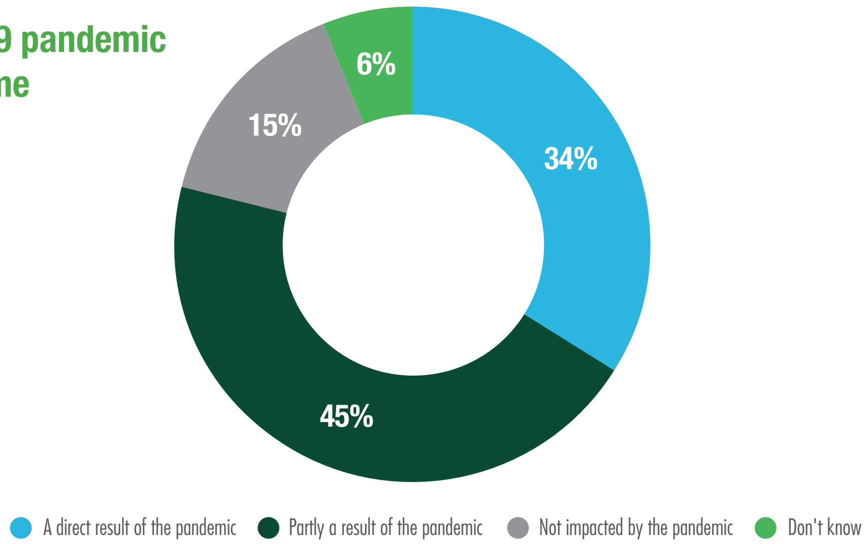


IMPACT OF THE COVID-19 PANDEMIC

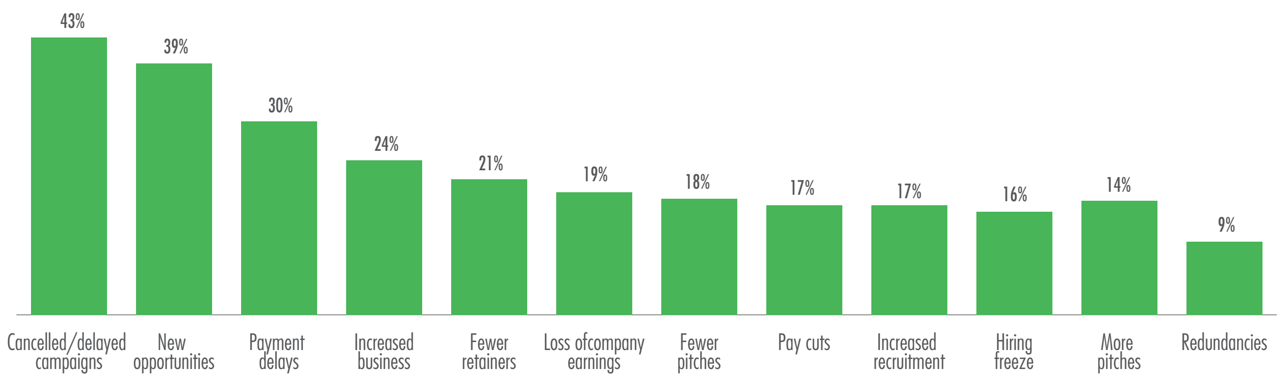
Expecting drop or growth in client income fee - by region



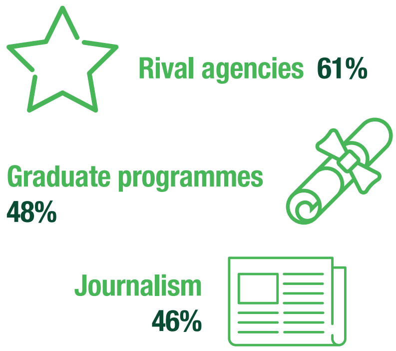
Impact of Covid-19 pandemic on client fee income

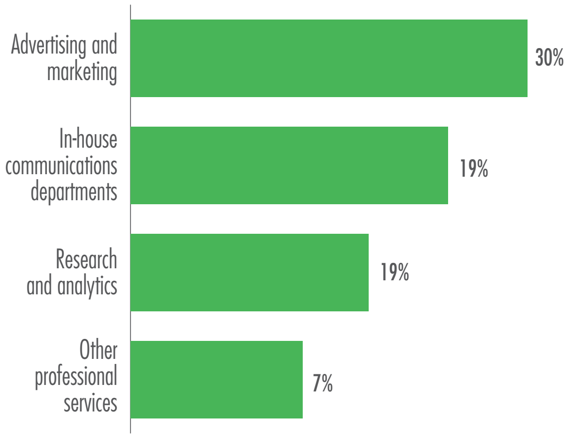


Impact of Covid-19 on PR firms

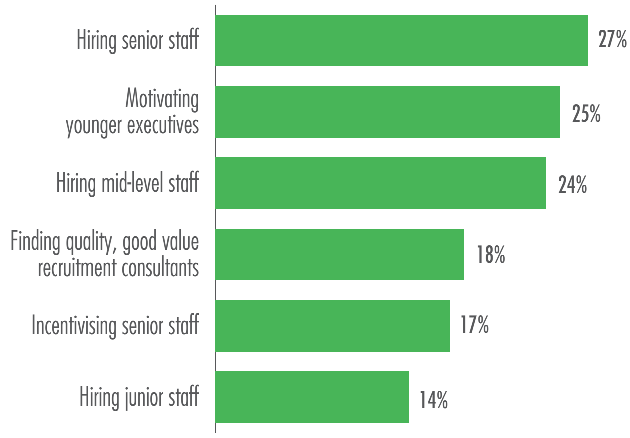


Expecting to source talent from

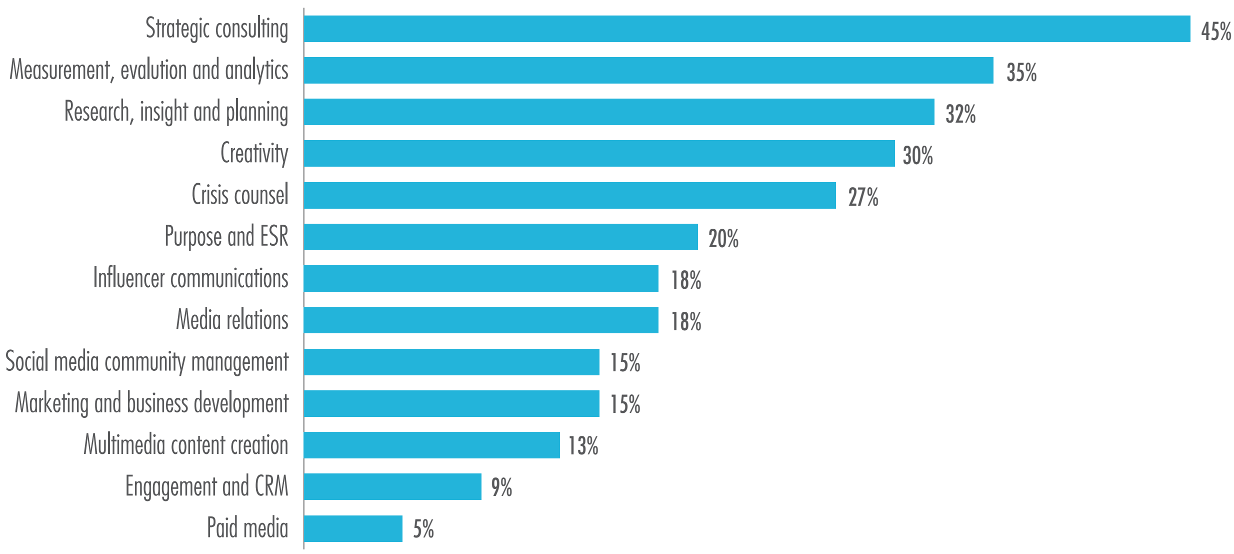




Talent strategy challenges



Future talent relevant skill sets



Respondents indicated their top 3 relevant skills for the future

TIME TO SEE THE BIG PICTURE

Rohan Shah
MANAGING DIRECTOR
AND CO-FOUNDER,
REUBEN SINCLAIR

As the industry makes a buoyant return amid the Covid-19 pandemic, it's clear that in many areas relating to talent sourcing, strategy, and future planning, not much has changed since last year's ICCO World Report. Firms continue to seek highly skilled and competent new employees from rival agencies, which ensures that retaining key talent remains a significant challenge across the board. We must remember however, that with the industry lacking in employees from diverse groups, sourcing existing talent from rival agencies will unlikely help achieve a more diverse workforce in the workplace and the industry.

It's interesting to see that motivating younger executives is no longer deemed to be such a priority for many this year, whilst a greater emphasis has been placed on the need to develop junior and mid-level staff and find people with non-traditional backgrounds. Given the tumultuous nature of the last two years, it is perhaps no surprise that 45% of respondents believe the most relevant skillset for future PR executives over the next decade will be in the realms of strategic consulting. Providing companies follow through on hiring people with non-traditional backgrounds, the diverse career experiences will help pave the way for innovative approaches and alternative working dynamics, which will ensure organisations stand out from the mainstream.

Many will undoubtedly wonder how to keep their senior staff and key players off the radars of competitive businesses, and this is a thought that will continue to dominate over the coming year. The first step for any organisation looking to improve in this area is to ensure you have a compelling offering when it comes to your Employee Value Proposition (EVP).

Being absolute in distinguishing between key staff will be critical; are your most highly prized personnel those who hold critical roles, or are they your current top performers? Perhaps you're more interested in looking ahead and want to ensure you retain those employees who show the most potential when it comes to moving from junior to mid-level, or mid-level to senior staffing positions.

Identifying whom you believe it's essential to keep will allow you to create a strategically aligned EVP as well as enabling better measurement of job satisfaction.

This should, of course, be done across the board, but ensure you are creating an environment where your team feels they can talk openly about their job satisfaction and how they perceive their value against your wider offering.

Compensating above market value is often a significant motivator for encouraging staff to stay with you; however, it is by no means a sure-fire way to get dissatisfied and unmotivated talent to stay.

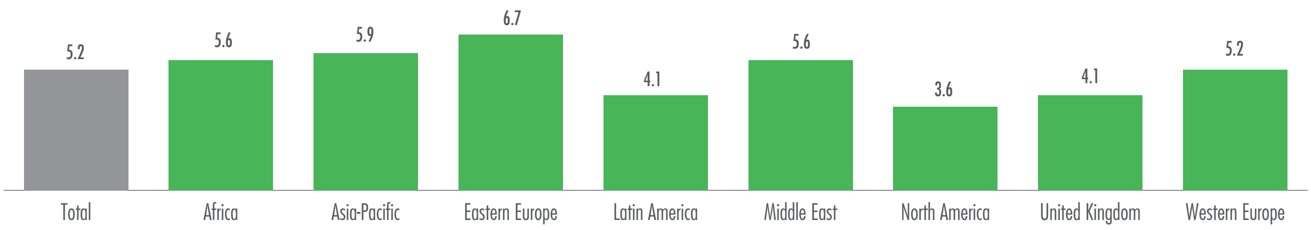
Other benefits, such as healthcare, the opportunity to work from home, increased holiday allowance and additional job security are all worth considering.

Find what your staff value most, if this can be done on individual basis – even better and build that into your perks, benefits and incentives wherever possible. Incentivising all staff, not just your senior members, is a critical component of this and something more organisations should be looking to invest time and money in.

As well as retaining staff, these approaches and a solid employer brand message will be vital in helping to attract future talent. Whether that be across sectors, or via your competitors.

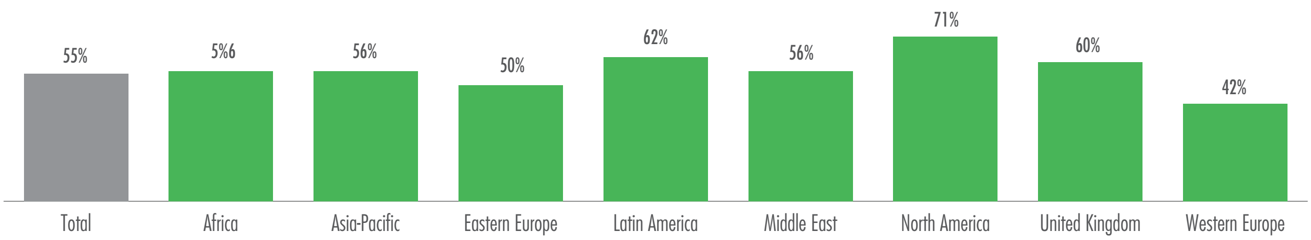
DIVERSITY AND INCLUSION

Diversity - reflecting ethnicity demographics by region

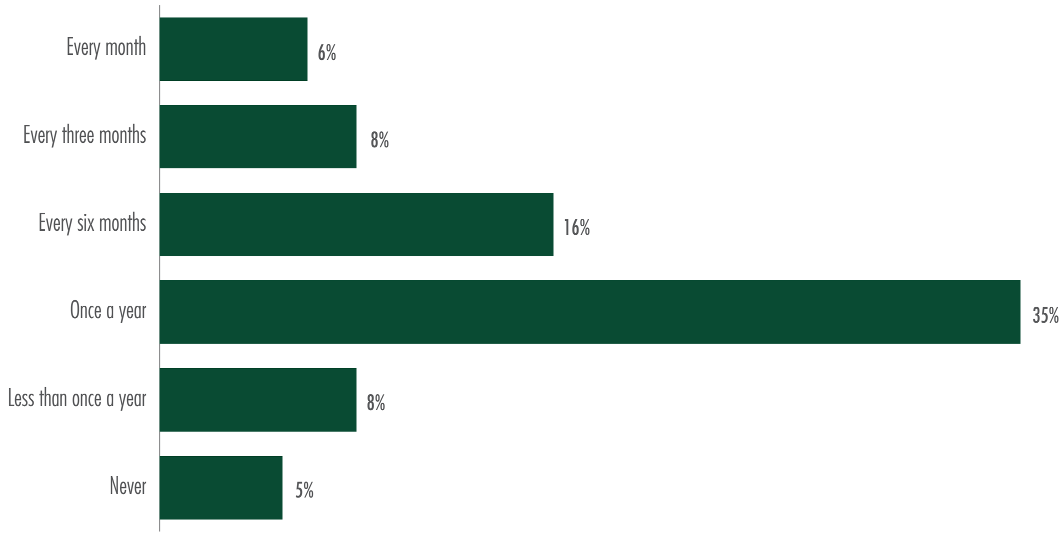


Respondent indicated whether their workforce was representative of their local ethnicity demographics

% of firms that have a diversity and inclusion policy by region



Frequency the diversity and inclusion policy gets reviewed and updated



2021: A TIME FOR AUTHENTICITY AND ACTION

It is that time of the year again, when businesses and individuals take stock of where they are at, so they might plan for the future based on insights and learnings of the current year. As I review the data from ICCO's World PR Report, I sit with the awareness and understanding that coun-tries and cultures are not homogenous, they are different and unique. That when we speak about diversity, equity and inclusion (DEI), we are at different points in our journey; sensitivity and awareness levels may wildly differ from country to country within a region or a continent. It is important to understand that priorities differ from country to country and sometimes in the same country the drivers of DEI differ from one region to another.

The insights from the report are interesting but not surprising.

The US and UK - parts of the West that were roiled last year after the brutal murder of George Floyd and 'Black Lives Matter' (BLM) - and Latin America fared poorly on the question of ethnic representation. The US was at 3.6 and the other two at 4.1. The key takeaway here is that there is heightened awareness and recognition of the inequalities in these geographies which is great, because it means that there is an acknowledgement of a) the problem and b) the need for urgent change.

This is further re-flected in the fact the same three countries score highest on firms that have a diversity and inclu-sion policy with the US at 71% followed by Latin America(62%) and UK(60%).

However, there seems to be worrying shift though in the Middle-East, Asia-Pac, and Africa if we compare with last year's data: representation of ethnic minorities has gone down in percentage terms. Surprisingly Western Europe fares the worst amongst the eight regions surveyed and we need further data to understand why that is. Overall the data is indicative of the absence of sub-stantive progress across countries/corporates and that may very well be due to the fact that in the past 18 months companies have paused to reflect and review their efforts in the direction. Or that most corporates have been fairly oblivious to systemic inequalities. It is encouraging to see that a large number of those surveyed review their policy at least once a year if not more.

The DEI agenda in the West was propelled by the horrific murder of George Floyd, BLM and the pandemic that exacerbated racial and ethnic inequalities. It required seismic events to spotlight the trials and tribulations of marginalised communities.

SUDHA SINGH

FOUNDER, THE PURPOSE ROOM

PODCAST HOST, THE ELEPHANT IN THE ROOM

C O-CHAIR, PRCA EQUITY & INCLUSION ADVISORY COUNCIL,

FOUNDING MEMBER, PRCA RACE & ETHNICITY EQUITY BOARD(REEB)

The impetus in some regions/ countries is regulatory requirements and for many companies it gets to the top of the agenda because of the associated business and reputation risks. In India for example the conversation centres largely on gender; the LGBTQ agenda comes to the fore at multinationals - where DEI policies at the HQ become the trigger points in local markets. Western multinationals have the power to enable positive change in the countries and communities where they operate.

However, it is crit-ical to keep in mind that companies must not try to force fit their policies in local markets, they must be mindful of local realities and engage with teams and experts to identify priorities or focus areas.

The last 18 months has laid bare the stark inequalities in our world. As we slowly move towards recovery, the outlook is fairly positive for our industry. This has also been a time for the sober-ing realisation that we are failing abysmally on representation, equity and inclusion, and the consensus all around is that it will require transformative changes if we are to build a fairer in-dustry. For businesses as they struggled with aftershocks, it has been a time to align their core purpose to broader societal needs, listen to their stakeholders, take a stand on important is-sues and not just because of share holder imperatives. CEOs and the C-suite are grappling with the pace of change, to adapt, and understand whatever state of flux we are in at that point in time. For an industry that aspires to have a seat at the table, and advise clients on purpose and sustainability, this puts us on the back foot. How can we advise clients authentically if we as an industry are not equitable or inclusive?

As we look to the future it is important to think about what we can do to build a better and fair-er industry. We can start by creating awareness about best practice through setting benchmarks and making cultural intelligence a key skill for all practitioners. According to a recent article in Forbes, the rise of awareness about diversity and inclusion has been one of the most transform-ative cultural trends of the last 10 years. How can we ride this wave, and what can we do to take advantage of the momentum?

Prioritise on just two things:

a) Be Authentic
b) Take Action

To be authentic live the values that we preach. Don't just say it to other people or for your clients, embed inclusion into your business. Start with C-Suite buy in and accountability; listen to your employees and stakeholders; create an inclusive hiring process; be transparent about the pay gap; consider intersectionality; be a sponsor and monitor constantly.

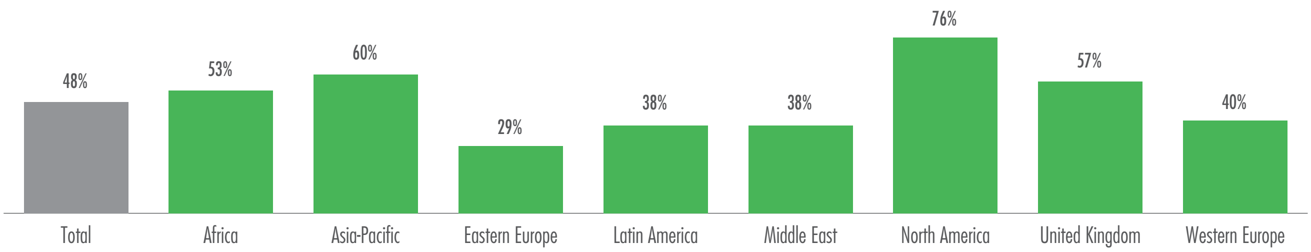
Take Action: Before you head to the next conference or write the next blog on equity and inclu-sion check your equity and inclusion policy. If you have one, map where you are on the journey; share your journey including your challenges. If you are not on the journey, get started.

And lose diversity, make it about equity and inclusion.

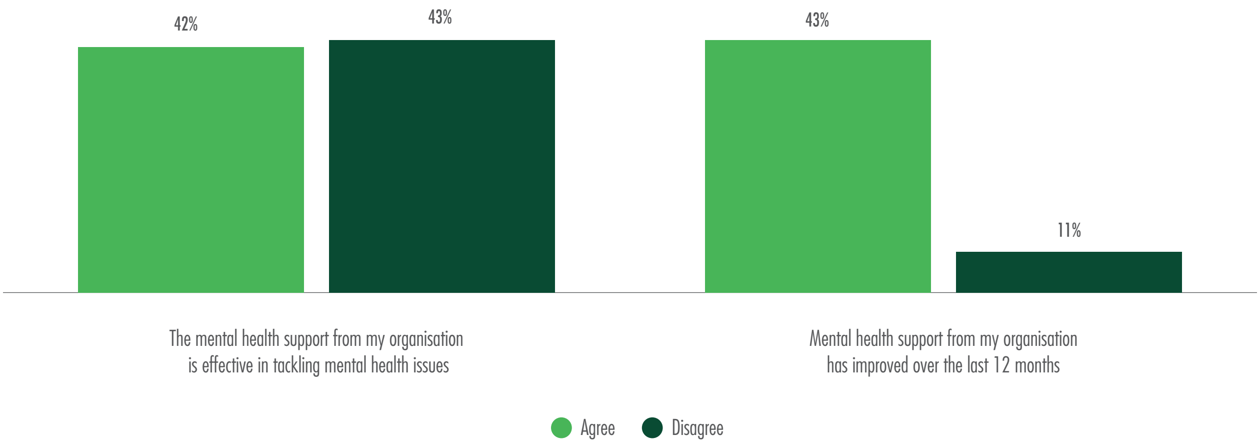
"It is not our differences that divide us. It is our inability to recognise, accept and celebrate those differences."

AUDRE LORDE

% of firms that have formal mental health and wellbeing support by region



Agreement with the following statements



Most used B2C Social media platform

Instagram 37% **Facebook 30%** **Twitter 13%**

LinkedIn 9% | **YouTube 2%** | **TikTok 2%**

6% do not use social media for B2C purposes

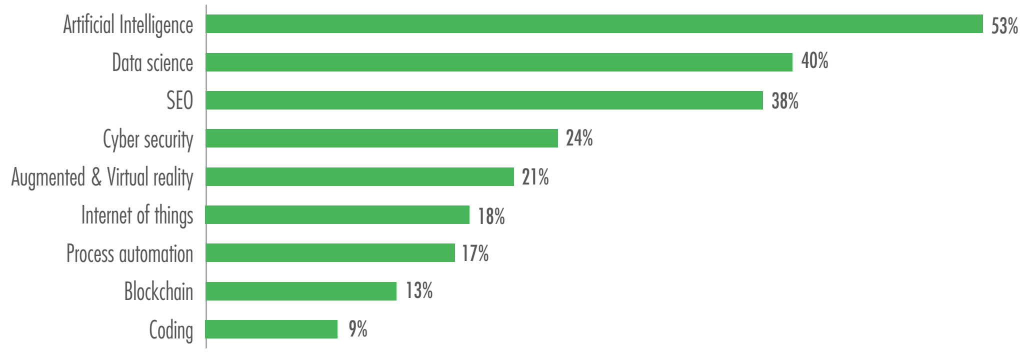
Most used B2B Social media platform

LinkedIn 65% **Twitter 12%** **Facebook 11%**

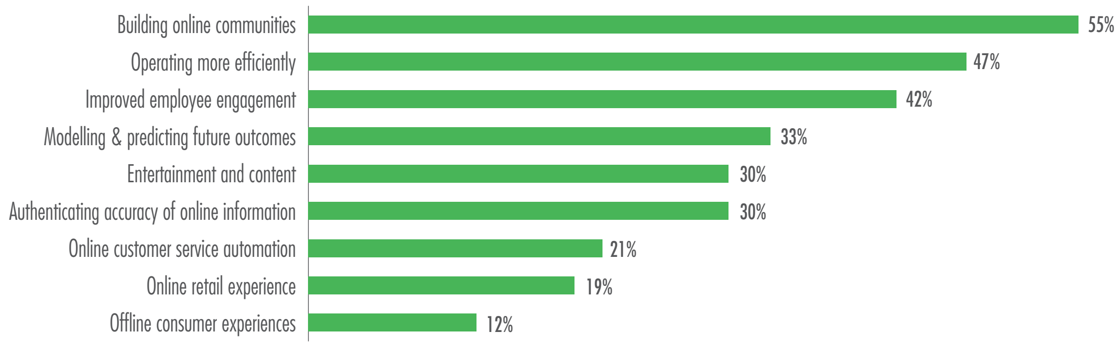
Instagram 4%

1% do not use social media for B2B purposes

Most relevant technologies – future prediction

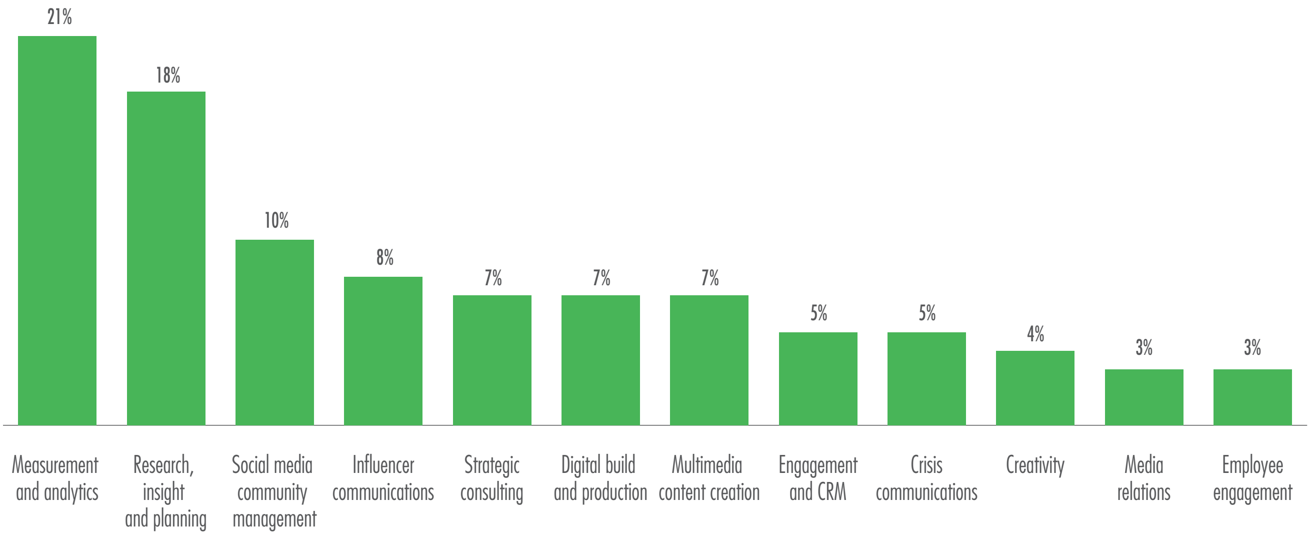


Important tech applications for businesses – future prediction



Rating of adoption of new technology by region

Technology having the greatest impact – future prediction



NO TIME TO LOSE

Richard Bagnall

CHAIR AMEC AND CO-MANAGING PARTNER, CARMA INTERNATIONAL

ICCO's World PR Report this year makes for some fascinating reading. After the shock of the calamitous world events in 2020, it is great to see the PR and comms industry recovering so strongly from the pandemic. Optimism abounds across the world for the future growth of the market. More agencies than not believe that profitability will increase. Opportunity exists in multiple areas with clients looking for support with corporate purpose initiatives, managing reputations and digital services.

There is confidence about future investment decisions and priorities.

The long list of areas where investment will be made features both 'measurement, evaluation and analytics' - where one in four ICCO members are expecting to invest, and 'research, planning and insights' where 18% are expecting to invest in 2022. This investment reflects some of the perceived challenges expected for the future. Approximately one third of all respondents see these same two investment priorities as top three issues for forthcoming skills challenges. They are topped only by 'strategic consulting' – which surely can only occur at an agency that has a good grip on research, planning and insights as well as its measurement, evaluation and insights.

We need however to see a lot more focus on getting these investment priorities right as there are other areas of this report that concern me, especially in relation to the great scourge of the measurement industry, the dreaded AVE.

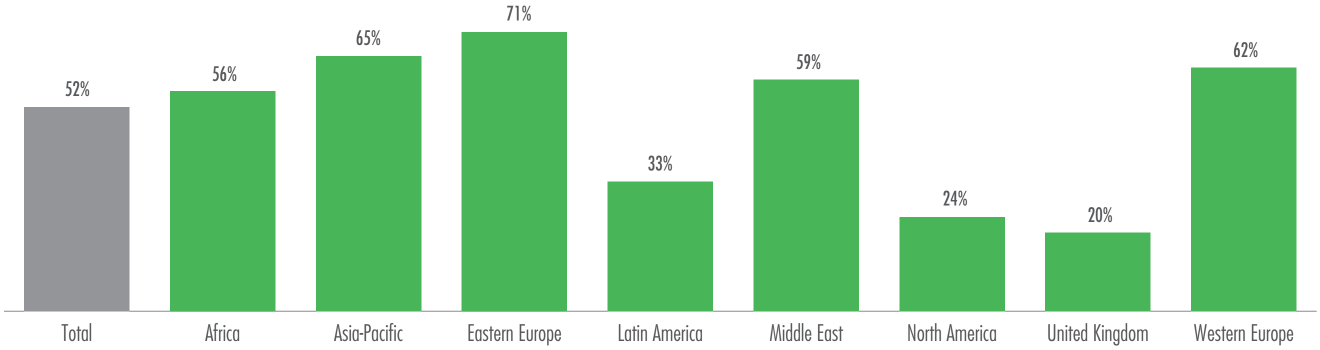
A shocking 52% of ICCO's survey respondents state that they use AVE as a metric, despite all the education work that has been done in the industry by the likes of AMEC, the PRCA and ICCO to eradicate its use. Since 2010's Barcelona Principles, AVE has been globally acknowledged as an 'invalid metric' that is not worth the paper it is written on. For a sector that knows how important ethical behaviour is, its continued widespread use in PR agency is simply not good enough. To blame its use on 'client demand' - which 38% of the respondents have done in this report - is not acceptable. Where is the courage to take an ethical stand and a strategic consulting position and advise the clients that are asking for it that it is a waste of time and money? Those looking for help on how to do this can find 22 reasons that they should not be used over on AMEC's site here www.bit.ly/saynotoaves. It's not just AVEs though. The top three metrics cited as being provided to clients are 'media clippings', 'engagement metrics' and 'AVE's. These are all activity driven metrics and are all ranked in the survey results well ahead of the metrics that actually measure the benefits that our work brings to our clients (metrics like awareness, web traffic and business results).

As we move out of the pandemic into the anticipated better days ahead, it is time for the PR agency sector to wake up.

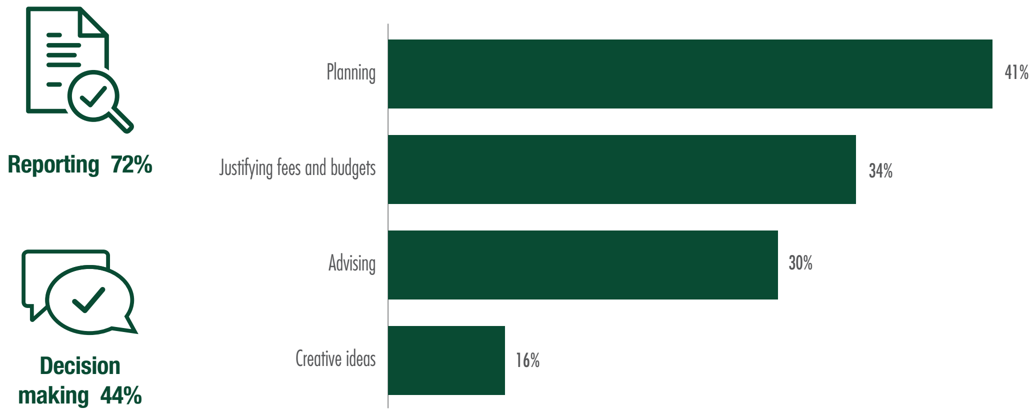
There is no more time for excuses, blaming others or inaction. Economic uncertainty around the globe driven by unprecedented debt levels, socio-economic and political challenges means that budgets will be tight and client organisations will be expecting a meaningful return for their investment. They are looking for organisational-relevant results that support their objectives, not to be serviced by 'busy fools' confusing meaningful evaluation with activity-driven 'counts and amounts'. Your client does not benefit from activity that cannot show any link to relevant results. If the counts and amounts of vanity metrics and AVEs are what you rely on for your measurement, you run the risk of your agency being seen as a cost centre and not a value creator.

If that is you, it is time to lean in, learn and embrace the approaches to provide meaningful measurement and evaluation. Join the 73% of ICCO members who already use AMEC's tools and resources. Head on over to the AMEC website where we provide multiple free resources to help you with your measurement journey, adopt best practice and solve these challenges. But hurry! There is now no time to lose.

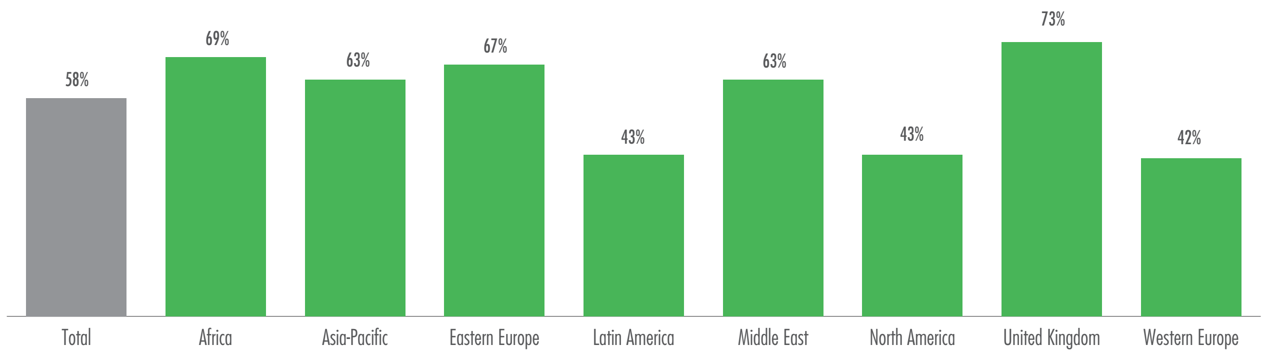
Use of AVE by region



Uses for measurement and evaluation



Usage of AMEC by region



Most likely client requests

- Media clippings **50%**
- Engagement metrics **43%**
- Advertising value equivalency (AVE) **38%**
- Web traffic analytics **32%**
- Media summaries **27%**
- Sentiment metrics **24%**

Most important objectives to clients' public relations goals

- Corporate reputation **61%**
- Building brand purpose **47%**
- Increased sales **46 %**

Purpose and social issues clients are most likely to address

- Sustainability & environment **56%**
- Diversity & social inclusion **34%**
- Healthcare **27%**

ANNUAL INDEX SURVEY FINDINGS

Angela Oakes

CO-FOUNDER &
JOINT PRESIDENT,

GLOBAL WOMEN IN PR

Flexible working - highly valued and here to stay

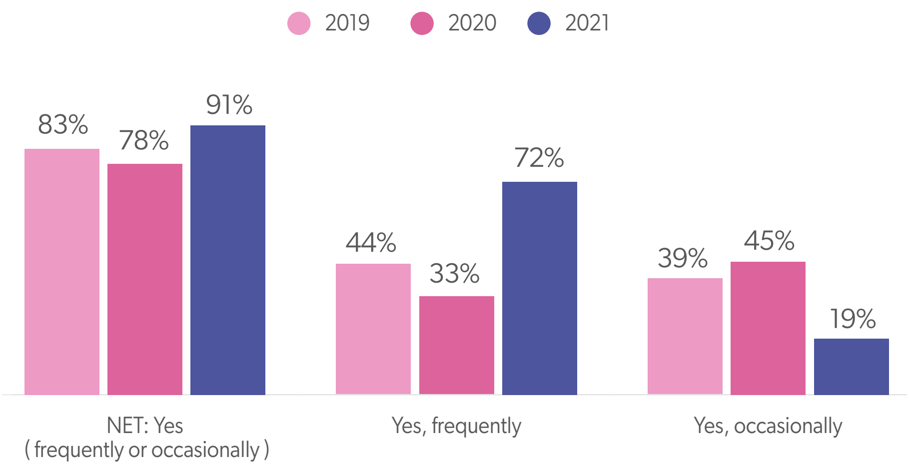
The Covid-19 crisis has put extraordinary pressure on companies and employees. The pandemic has shaken the global economy and turned peoples' lives upside down, both at work and at home.

Over the past 18 months there has been a fundamental change in the way people work. Companies have embraced flexibility and remote working at levels that would have seemed impossible just a few years ago.

It will take time for the full impact of the pandemic to be realised, but one thing is clear: hybrid working is here to stay. So will this advantage the careers of women working in the global PR industry?

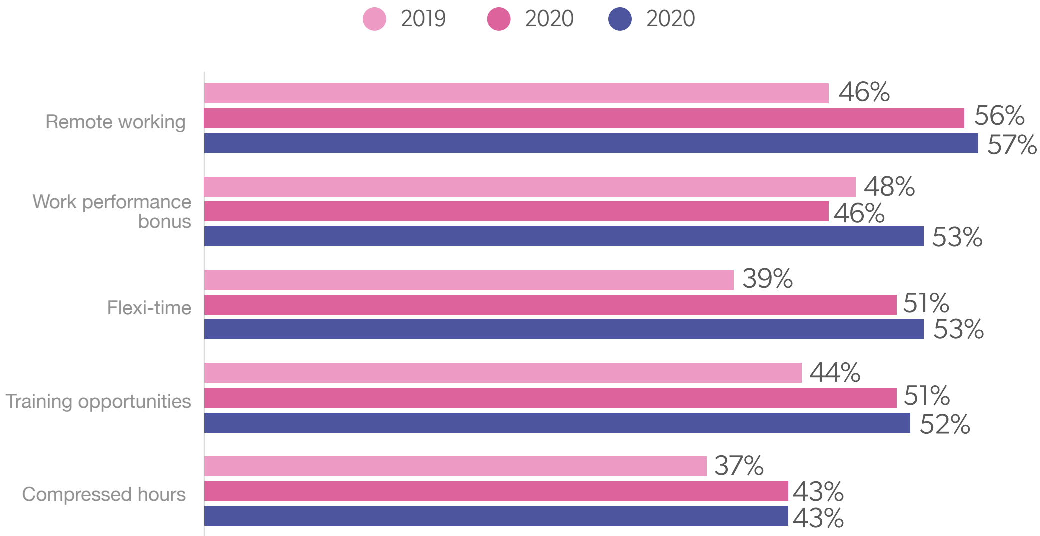
Since the beginning of the pandemic there has been a significant increase in PR professionals working flexibly – up to 91%

Flexible working in 2019, 2020 and 2021

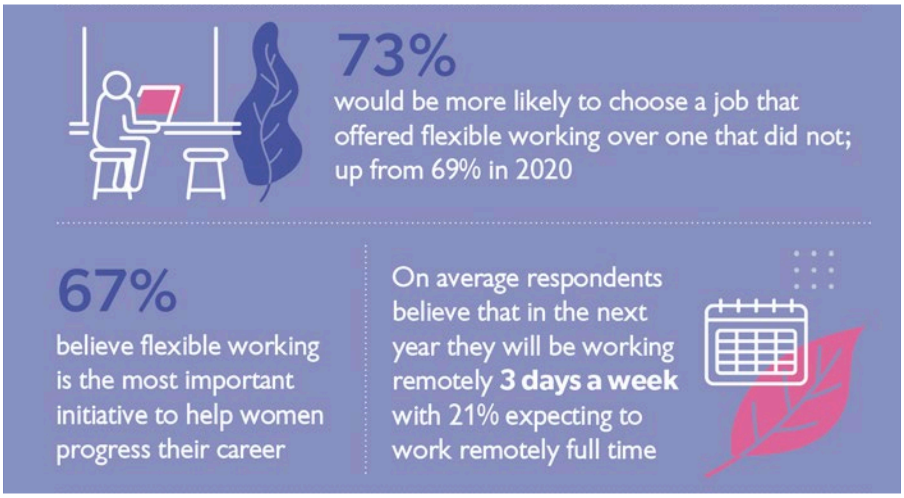


Of note is the finding that remote working is the workplace benefit most desired now by 57% of PR professionals – ahead of financial reward.

What do PR professionals want from their workplace?



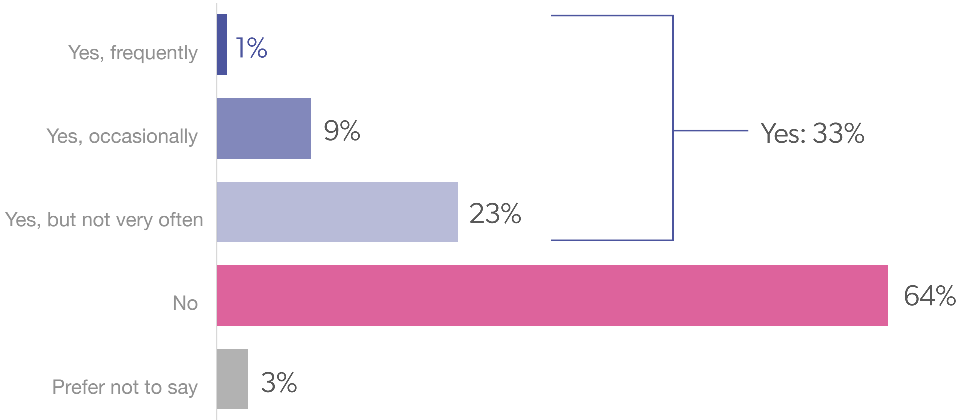
Our GWPR research clearly reveals there is a huge and growing demand amongst PR women for flexible and remote working. Flexible working is particularly beneficial to women with children; who believe it gives them a healthier work-life balance.



A burn-out work culture

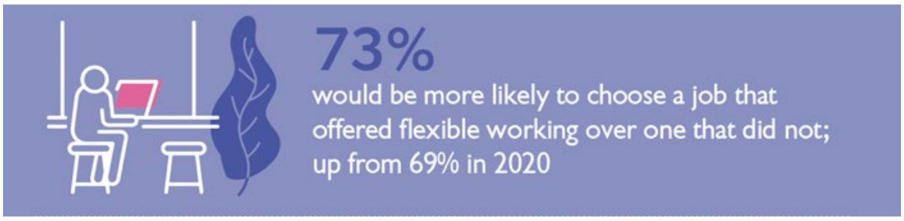
On the down side flexible working can quickly turn into an "always on" 24/7 work culture and burn out. Only around half of PR professionals claim to have a good work-life balance. One in three have suffered from work-related stress and worryingly this increases to over half of 18-34year olds. One thing organisations must do is set clear boundaries for flexible working and provide more mental health support initiatives. Globally, 1/3 of organisations don't provide any support.

Have you ever been absent from work because of work-related stress, or anxiety?



Boardroom benefits and barriers

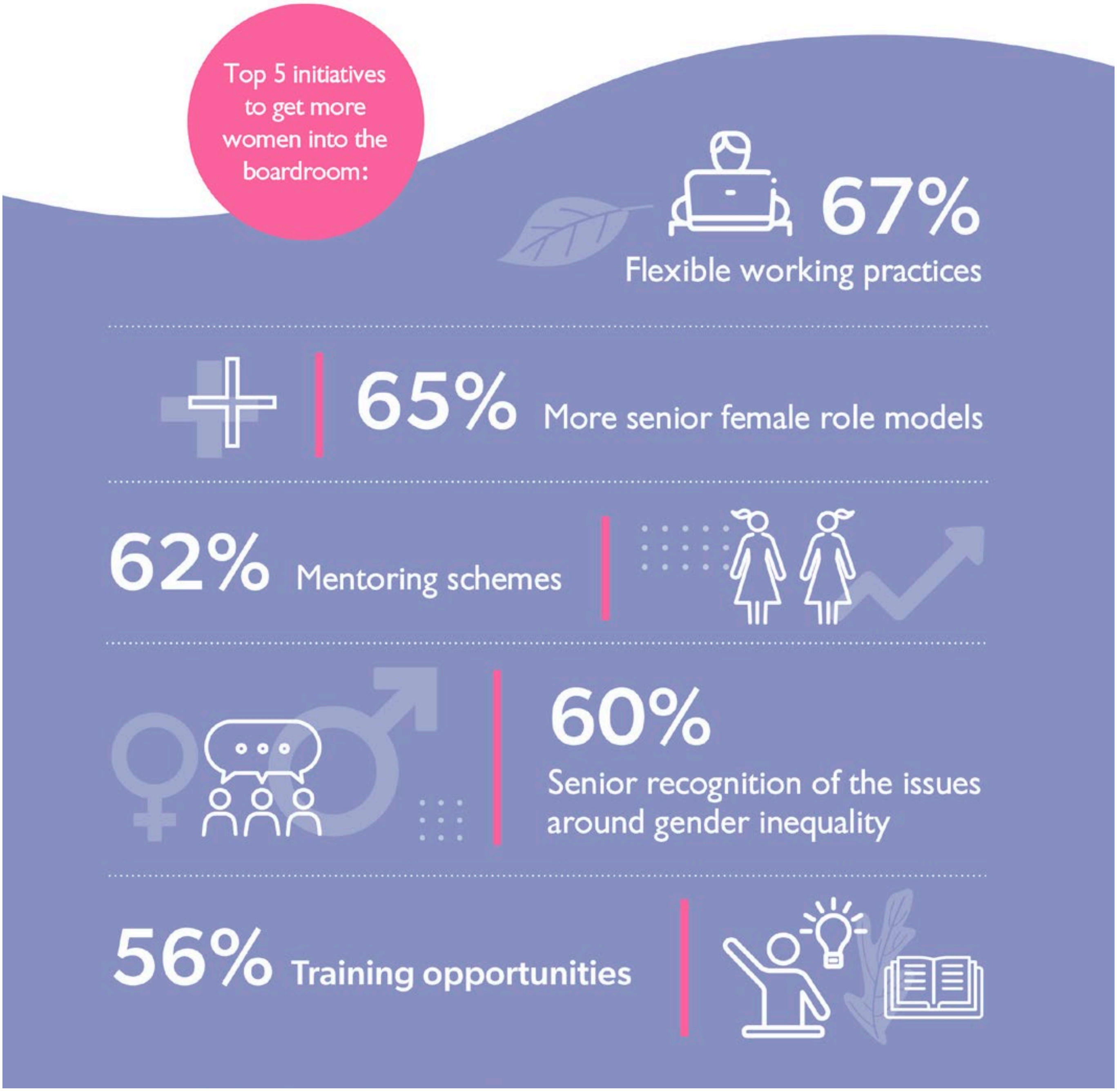
The prospect of more women in the boardroom is acknowledged as great for business, but change continues to be frustratingly slow.



Business Benefits

Biggest Barrier

We know the biggest barrier women face when it comes to progressing in to senior positions continues to be childcare or caring responsibilities (86%). So what can we do to accelerate change?



Flexible working is recognised as being the most beneficial initiative to get more women into the boardroom. As we've seen this is on the rise and will help drive change.

At GWPR we are launching EMPOWER - the first ever international leadership and mentoring programme for women in 2022. Another initiative to encourage and support the next generation of PR women.

It will be fascinating to see if the long-term impact of Covid will have positively helped women in the PR workplace of the future.

The GWPR Annual Index 2021 report will be available to download at **www.globalwpr.com**.

Our thanks to strategic insight agency **Opinium** for continuing to support GWPR.

Founded to connect, champion and support women in senior PR and Communication roles around the world, GWPR is a not-for-profit organisation driven by a desire to change the landscape for women working in our industry.

REGIONAL RESULTS

Top 3 most commonly selected answers

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

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

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

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

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

1. Social media community management
2. Multimedia content creation
3. Measures and analytics

In which of the following service areas do you expect to see the most growth over the next five years?

1. Corporate reputation
2. Marketing communications
3. Multimedia content creation

Has the covid-19 pandemic impacted your PR firm and it's work in any of the following ways since January 2021?

1. Cancelled/delayed campaigns
2. Payment delays
3. Loss of company earnings

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

1. Retaining key talent
2. Finding people with diverse career backgrounds
3. Hiring senior staff

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

1. Strategic consulting
2. Crisis counsel
3. Measurement, evaluation and planning

Which, if any, 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/work with unethical clients
2. Pressure from clients
3. Misinformation/disinformation

Which of the following social issues are you/ your client most likely to address?

1. Sustainability and environment
2. Education
3. Economic inequality and poverty

Which of the following tech applications is important to your business in the near future?

1. Authenticating accuracy of online information
2. Building online communities
3. Operating more efficiently

ASIA-PACIFIC

Top 3 most commonly selected answers

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

1. Corporate reputation
2.Online PR
3. Digital PR

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

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

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

1.Social media community management
2. Multimedia content creation
3. ESG (environmental, social and governance)

In which of the following service areas do you expect to see the most growth over the next five years?

1. Influencer marketing
2.Social media and community management
3. Corporate reputation

Has the covid-19 pandemic impacted your PR firm and it's work in any of the following ways since January 2021?

1.Cancelled/delayed campaigns
2. Payment delays
3. New opportunities

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

1. Retaining key talent
2. Developing junior and mid-level staff
3. Finding people with diverse career backgrounds

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

1. Strategic consulting
2. Measurement, evaluation and analytics
3. Research, insight, planning

Which, if any, 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/work with unethical clients
2. Lack of training
3. Misinformation/disinformation

Which of the following social issues are you/ your client most likely to address?

1. Sustainability and environment
2. Healthcare
3. Education

Which of the following tech applications is important to your business in the near future?

1. Building online communities
2. Operating more efficiently
3. Improved employee engagement

Top 3 most commonly selected answers

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

1. Social media and community management
2. Corporate reputation
3. Public affairs/government relations

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

1.Healthcare
2. Consumer products
3. Technology

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

1. Social media and community management
2. Multimedia content creation
3. Strategic consulting

In which of the following service areas do you expect to see the most growth over the next five years?

1. Purpose and CSR
2. Corporate reputation
3. Strategic consulting

Has the covid-19 pandemic impacted your PR firm and it's work in any of the following ways since January 2021?

1.New Opportunities
2. Cancelled/delayed campaigns
3. Delayed payments

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

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

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

1. Strategic consulting
2. Research, insights, planning
3. Measurement, evaluation and analytics

Which, if any, 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 or work for unethical clients
2. Misinformation/disinformation
3. Pressure from clients

Which of the following social issues are you/ your client most likely to address?

1. Education
2. Sustainability and environment
3. Healthcare

Which of the following tech applications is important to your business in the near future?

1. Operating more efficiently
2. Improved employee engagement
3. Building online communities

LATIN AMERICA

Top 3 most commonly selected answers

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

1. Digital PR
2. Strategic consulting
3. Marketing communications

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

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

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

1.Strategic consulting
2. ESG (Environmental, Social and Governance)
3. Social media community management

In which of the following service areas do you expect to see the most growth over the next five years?

1. Corporate reputation
2. Strategic consulting
3. Influencer marketing

Has the covid-19 pandemic impacted your PR firm and it's work in any of the following ways since January 2021?

1. New Opportunities
2. Cancelled/delayed campaigns
3. Payment delays

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

1. Retaining key talent
2. Developing junior and mid-level staff
3. Finding people with diverse career backgrounds

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

1. Strategic consulting
2. Research, insights, planning
3. Measurement, evaluation and analytics

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

1.Misinformation/disinformation
2. Lack of training
3. Lack of consequences for agencies that do not behave ethically or work for unethical clients

Which of the following social issues are you/ your client most likely to address?

1. Sustainability and environment
2. Diversity and inclusion
3. Social media ethics (e.g. bots, fake news, hate speech etc)

Which of the following tech applications is important to your business in the near future?

1. Building online communities
2. Operating more efficiently
3. Improved employee engagement

MIDDLE EAST

Top 3 most commonly selected answers

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

1. Insights, data, evaluation and analytics
2. Digital PR
3. Influencer marketing

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

1.Technology
2. Consumer products
3. Public sector

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

1.Influencer marketing
2.Social media community management
3. Digital build and product

In which of the following service areas do you expect to see the most growth over the next five years?

1. Social media and community management
2. Influencer marketing
3. Multi media content creation

Has the covid-19 pandemic impacted your PR firm and it's work in any of the following ways since January 2021?

1.Cancelled/delayed campaigns
2. Payment delays
3. New opportunities

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

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

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

1. Creativity
2. Crisis counsel
3. Measurement, evaluation and analytics

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

1. Pressure from clients
2. Lack of training
3. Lack of consequences for agencies that do not behave ethically or work for unethical clients

Which of the following social issues are you/ your client most likely to address?

1. Sustainability and environment
2. Technology empowerment
3. Mental health

Which of the following tech applications is important to your business in the near future?

1. Building online communities
2. Entertainment and content
3. Operating more efficiently

NORTH AMERICA

Top 3 most commonly selected answers

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

1. Strategic consulting
2. Digital PR
3. Mutlimedia content creation

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

1. Healthcare
2. Technology
3. Consumer products

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

1. Social media and community management
2. ESG (Environment, social and Governance)
3. Influencer communications

In which of the following service areas do you expect to see the most growth over the next five years?

1. Corporate reputation
2. Social media and community management
3. Influencer marketing

Has the covid-19 pandemic impacted your PR firm and it's work in any of the following ways since January 2021?

1. New Opportunities
2. Increased business
3. Increased recruitment

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

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

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

1. Strategic consulting
2. Research, insights, planning
3. Measurement, evaluation and analytics

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

1. Misinformation/disinformation
2. Lack of consequences for agencies that do not behave ethically or work for unethical clients
3. Balancing agency income/growth with considerations around ethical bahaviour

Which of the following social issues are you/ your client most likely to address?

1. Diversity and inclusion
2. Sustainability and environment
3. Healthcare

Which of the following tech applications is important to your business in the near future?

1. Operating more efficiently
2. Building online communities
3. Improved employee engagement

UNITED KINGDOM

Top 3 most commonly selected answers

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

1. Strategic consulting
2. Digital PR
3. Corporate reputation

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

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

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

1. ESG (Environment, Social and Governance)
2. Multimedia content creation
3. Social media community management

In which of the following service areas do you expect to see the most growth over the next five years?

1. Purpose and CSR
2. Strategic consulting
3. Corporate reputation

Has the covid-19 pandemic impacted your PR firm and it's work in any of the following ways since January 2021?

1. New Opportunities
2. Increased recruitment
3. Cancelled/delayed campaigns

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

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

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

1. Strategic consulting
2. Measurement, evaluation and analytics
3. Media relations

Which, if any, 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 or work for unethical clients
2. Balancing agency income/growth with considerations around ethical behaviour
3. Lack of internal policy on ethical behaviour

Which of the following social issues are you/ your client most likely to address?

1. Sustainability and environment
2. Diversity and Social inclusion Education
3. Technology empowerment

Which of the following tech applications is important to your business in the near future?

1. Operating more efficiently
2. Building online communities
3. Improved employee engagement

WESTERN EUROPE

Top 3 most commonly selected answers

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

1. Digital PR
2. Strategic consulting
3. Marketing communications

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

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

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

1. Strategic consulting
2. ESG (Environmental, Social and Governance)
3. Social media community management

In which of the following service areas do you expect to see the most growth over the next five years?

1. Purpose and CSR
2. Corporate reputation
3. Strategic consulting

Has the covid-19 pandemic impacted your PR firm and it's work in any of the following ways since January 2021?

1. Cancelled/delayed payments
2. New opportunities
3. Increased business

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

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

1. Strategic consulting
2. Creativity
3. Measurement, evaluation and analytics

Which, if any, 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 or work for unethical clients
2. Pressure from clients
3. Misinformation/disinformation

Which of the following social issues are you/ your client most likely to address?

1. Sustainability and environment
2. Diversity and inclusion
3. Healthcare

Which of the following tech applications is important to your business in the near future?

1. Building online communities
2. Improved employee engagement
3. Modelling and predicting future outcomes

Learning new ways, managing expectations and delivering on client objectives remains the focus and priorities of the PR consultant regardless of the impact of Covid. Life goes on and our dynamic industry adjusts and performs accordingly.

Much like last year, the status quo is that the public relations industry has been affected as much as any other. Maybe even a bit more, when you consider how dependent it is on media attention, much of which has been consumed by other mask and lockdown-related headlines.

It is not just about the challenges of campaigns being put on hold, or having to re-build relationships, or navigate the shrinking media environment or even navigating the authenticity of online information, it is also about building, focusing on diversity and promoting an inclusive workplace as well as recognising the need to meet sustainable business practices.

Our peers remain optimistic about the future as they have settled into a new norm. Corporate Reputation was a growth area as well as an increase is crisis counsel and management. Healthcare, financial and professional services and technology were the highest performing sectors and it is expected that the demand will continue into the coming year. Technical and digital innovations are likely to shape agency offerings to clients going forward.

The pandemic made it difficult or impossible to meet in person at client meetings, industry events, and elsewhere. Sure, the whole planet learned to “Zoom” but there are still limits to contact in the virtual world. The drastic reduction in the amount of facetime, has led to previous contacts being lost and fewer new ones made.

One of the biggest challenges is not being able to meet up with journalists in person or have the opportunity to engage at media round tables or other similar events. We have learnt to put more effort into creating video footage and sound bites. We have trained our clients to effectively deliver messages online.

It’s difficult to keep track of which reporter or key contact at which media outlet still covers a particular industry or area, as many media outlets continue to downsize, rely on freelancers, or reconfigure. This pivot to an increasingly remote workforce at media outlets has made it more difficult to be able to connect with the right person for the pitch via phone and in-person networking opportunities are only just now ramping back up. We’ve been able to overcome this challenge by creatively utilising other available avenues of communication, like Twitter and LinkedIn.

As for clients, we are so used to doing all business meetings on Zoom, Teams or Google Meet and when we want the personal touch, we actually pick up the phone and make a call.

Bridget von Holdt

CO-MARKET LEADER: SOUTH AFRICA, MANAGING DIRECTOR & ICCO AFRICA PRESIDENT

One real issue is landing your story in a top publication. Getting noticed by the journalists has really become a difficult task. These top publications receiving 100’s of pitches a day, so getting attention is difficult. And to add to the pressure, they are receiving pitches from email, text, phone calls, DMs, LinkedIn requests, Tweets, Instagram and TikTok comments, and more. The competition for attention is fierce.

Talent retention and attracting senior talent remains a priority for consultancies now and into the future. While the talent is there, the corporate sector is attracting the practitioners. The time is not to look after staff, plot their career paths and provide flexibility in the working environment.

The World Report results are a valuable indicator of where consultancies can adapt to meet the needs of employees and clients and lead them into the future.

HOPE FLOATS

Nitin Mantri

PRESIDENT, ICCO

GROUP CEO, AVIAN WE

The last year has been a mixed bag of challenges and opportunities. Hope followed closely on the heels of despair as vaccines followed COVID-19 and recovery followed lockdowns.

The PR industry was no exception. Consultancy heads, across regions worldwide, admitted that Covid-19 hit business, with 43% identifying cancelled or delayed campaigns as the worst fallout while others said new opportunities (39%) and payment delays (30%) were also affected. However, it was not all gloom and doom as the score for perceived growth and opportunity for PR touched an optimistic 7.3, on an ascending scale of 1 to 10.

Asia Pacific (APAC) region agency heads were the most confident about industry growth, pegging the predictive score for growth and opportunity at 7.8, a notch above Africa and United Kingdom scores of 7.6 and surpassing the global score of 7.3.

Growing stronger

The industry is expecting a decent increase in profitability this year despite the challenges. PR agencies have been successfully addressing client needs, guiding them through the tricky post-pandemic terrain.

The APAC region was most in agreement in this aspect, scoring client needs addressal an enthusiastic 6.8. And this in the face of hurdles like fake news. APAC PR leaders gave an agreement score of 6.3 – at par with the global score – to the increasing difficulty in differentiating between accurate information and fake news. However, leaders insist that the PR industry continued to operate ethically, with APAC sentiments (6.6) similar to the global stance (6.5) on this.

Looking ahead, the biggest areas of growth are expected to be corporate reputation (35%), purpose and CSR (35%) and strategic consulting (32%). IT and technology will continue to be the biggest sector of growth, followed by health care and financial and professional services.

In fact, the APAC region PR heads have shared a score of 7.1, validating that the PR industry is adapting to new technologies at an appropriate pace. This is way ahead of the global score of 6.5. And of these technologies, artificial intelligence, data science and SEO were seen as becoming the most relevant to PR practitioners in the next decade. Tech apps to build online communities, help operational efficiency and improve employee engagement were identified as PR heads as being most important for business in the near future.

In terms of expected areas of investment, the industry chose social media community management, ESG and multimedia content creation as top priorities.

What matters most

The industry seems to have been performing well in terms of corporate responsibility and purpose, both of which have emerged as the most important objectives to clients' public relations goals.

The APAC region agencies gave a score of 7.2 in agreement with the fact that corporate CEOs take corporate reputation seriously and 7.4 to the statement that companies are paying more attention to corporate purpose. The global scores for both aspects stood at 6.9.

Internal affairs

Internally, one of the pain points for the industry is still talent. Retaining key talent has come up as the top issue (52%). The APAC relatability region scores with the premise that there is a plentiful supply of talent is 6.1. Skill sets most relevant to PR executives in the future will be strategic consulting, followed by measurement, evaluation and analytics; research, insight and planning, and creativity.

When it comes to employee well-being, diversity and inclusion are the buzzword across industries globally. For the APAC region this is another pain point. Reflection of ethnic demographics among employees here scores 5.9, indicating considerable scope of improvement. Only 56% firms in the region have a D&I policy compared to 70% in North America, 62% in Latin America and 60% in the UK.

The mental well-being support situation, though, is more promising. 60% of the APAC firms have formal organizational mental health and wellbeing support available - extremely heartening given that the corresponding global figure is 48%.

FROM RESILIENCE TO AMBIDEXTERITY, PR MOVING FROM BUSINESS TO BUSINESS TO HUMAN TO HUMAN

Massimo Moriconi

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The results of the ICCO 2021 World Report highlight the “ambidexterity” of the PR sector, or rather, the ability to be excellent consultants and, at the same time, plan the evolution of our profession in the context of the “BIG reset” originating from the pandemic. If over the last year covid 19 highlighted the resilience of the industry, today the social movements on issues such as vaccines, climate change, and DE&I, give PR consultancies the chance to work on their own evolution. A challenging scenario but also full of opportunities. In the study, in which Western European professionals highlight an optimism equal to 7.2 on a scale of 1 to 10 compared to 6 out of 10 a year ago, it emerges that it is Western Europe that has the highest expectations of growth in profitability, more than any other region in the world.

While Digital PR and strategic consulting have represented the fastest growing services for agencies over the last 12 months, investment intentions for the future and areas with the greatest potential are identified in Strategic Consulting, ESG, Purpose Comms Report and Creativity. The situation shows the willingness of the PR sector to guide and accompany business, and the society in which it operates, in a European context of great change thanks to various investment programs (such as the Next Generation EU or the Fit For 55 package), and the increasingly crucial conversations on environmental and social issues. In this scenario, PR professionals take on the role of co-designers of the information society, an important role that can help create a better world and that must be able to rely on quality and ethical certifications on which, according to the World Report by ICCO, Western Europe is the most virtuous region.

But what are the challenges in this path for the industry?

According to the Report, retaining talents and attracting new ones, especially seniors, from other disciplines remains the main challenge for the Region together with the need for agencies to offer their people support on mental health and flexible working issues.

The human dimension, therefore, emerges in the era of the pandemic as never before, and the opportunity to think about the relationship between clients and agencies no longer just from a business to business but a human-to-human perspective is evident.

To make the most of it, our industry can work on its own culture, HR policies, and areas such as DE&I. Not only that, it can make its own contribution on issues that relate to communication but have a significant impact on society, on people’s lives, for example, freedom of expression and media, media literacy to fight fake news, and the implications of Artificial Intelligence. ICCO is already working on all these thanks to the collaboration with institutions and qualified partners from other sectors, with the aim of co-creating the first White Paper on the challenges of the modern information society. Today, more than ever, is the moment to shape future generations of PR professionals who will be protagonists of the big reset, with new skills and cultural backgrounds.

A FUTURE ALREADY IN THE MAKING

Not two years ago, the digital future was a milestone that we were building towards, exploring the breadth of artificial intelligence and machine learning. Within months from the onset of the pandemic, that same future blindsided us by becoming our immediate present, emboldening our resilience while changing the world in the process overnight.

Our homes became our workspaces, meetings were restricted to virtual interactions, and schools transitioned to an online system that none were prepared for but had to adapt to.

But this human experience, challenging as it may have been, consolidated our resistant spirits and our capability to instinctually adapt to changing situations; we created technology to assist us, and when we needed it most, every tool we had innovated proved worthy.

Of all, the most interesting of such journeys is that of the communication sector, which was equipped to handle the challenges of the pandemic, especially as the onus had always on us to anticipate the future and lay the foundations for adapting to processes before they become prevalent trends. For us in the PR industry in particular, the digital transition is but one of the building blocks that we are employing towards the future and the changes it will bring.

From a statistical standpoint, the Middle East PR ecosystem remained optimistic about the growth of the public relations market, with those surveyed mostly agreeing with the sentiment, scoring 7.5 out of a 10-point mean average, placing the region alongside mature markets, such as those of North America and the UK.

Another important Middle East takeaway from the report is that of the surveyed professionals, most agree (6.3/10) that corporate CEOs have started taking corporate reputation seriously since the onset of the pandemic and that companies are now paying more attention to corporate purpose (6.1/10). This brought forth the need for effective thought leadership programmes that would reflect and exemplify the values and mission of a personal or corporate brand.

Ahmad Itani

CHAIRMAN OF PRCA MENA

PRESIDENT OF ICCO MIDDLE EAST

FOUNDER AND CEO OF CICERO & BERNAY COMMUNICATION CONSULTANCY

Subsequently, as more mediums pivoted towards digitalisation, PR services in the Middle East reflected that change (6.3/10), with agencies now positioning digital presence to the forefront to successfully address clients' evolving needs. Businesses also found themselves in an opportune ecosystem that encouraged the roll-out of innovative services to cater to this change, from virtual showrooms for vehicular brands to an expanded use of e-commerce across every sector.

ANALYSIS: MIDDLE EAST

Therefore, it comes as no surprise that the Middle Eastern PR landscape was cited as one of the most advanced in terms of technology adoption, with the regional PR industry adapting to new technologies at an appropriate pace (6.5/10). This was further reflected in a report by PWC Middle East that positioned AI as a game changer in businesses and PR industry was no different.

The pandemic upended the talent strategies of global organisations, with remote work becoming more of a norm and surveyed Middle East PR professionals stating that retaining key talent, motivating younger executives, and training and developing junior and mid-level staff remained the main challenges PR agencies faced in their talent strategies in the region.

When asked about the areas they expect an increase in PR firms' investment this year, the top three were influencer marketing, social media community management, and digital build and product. Influencers and social media platforms hold a lot of pull with youths and millennials, but that doesn't mean marketers can take a back seat; audience segmentation and market understanding are key to identifying the right tools and influencers to work with to deliver optimal results.

Overall, the results of the survey are a reminder of the fact that the PR industry in the region is resilient and ready to adapt to the changing times.

These are motivating and encouraging insights for the industry as well as a signal of a positive path ahead that hint at the absolute necessity of 360-degree solutions that are as offered as they are anticipated.

HUMAN CONNECTIONS ARE OUR OPPORTUNITY FOR GROWTH

This year's report is particularly exciting, arriving as the world goes through a period of rapid change. In North America, agencies and consultancies have grown over the past year and, importantly, that growth has been driven by strategic consulting and digital services. As complex and systemic issues stacked up and companies accelerated their own digital transformation, boards and C-suite leaders called more on our industry's expertise to help them talk about and make that shift. Communications in health care or technology had a particularly busy year, and as we look ahead, we can see the intersections of these industries increasing.

Health, in fact, was the year's biggest growth area, and I think we can understand the current opportunity as being at that intersection: both physical health and the qualities of mental, social, economic, and planetary health, which are now so prominent in our cultural conversation.

In every sphere of life, from the cultural to the economic, from our personal lives to our national politics, it's clear this is a time of change. Change was in the air well before the shock of Covid-19 – I'm thinking in particular of the Business Roundtable's **redefinition of a corporation's purpose** to focus on positive impact – and the last two years have proven to be fertile ground for thinking about how we might remake the world differently.

You will have felt it yourself, relearning what matters most to you as you build a routine which isn't anchored by the office. The world has recognized that technological and cultural developments are needed to accommodate new ways of fitting work and life together, but the individual attitudinal shifts that stem from this change will play out over a longer timescale. Our task will be to understand and shape that narrative.

It's likely that you also felt it yourself when facing the challenges of personal motivation in a disrupted world, having to find new channels to build a sense of community with colleagues. As working patterns diversify, establishing a clear brand identity which includes purpose and culture and gives people meaning and belonging is becoming more important than ever. Our task will be to take on a more strategic, consultative role which captures that holistic picture of business health.

We've also been witnessing and participating in the upswell of social justice action over the last two years. The headlines may have changed, but the energy and passion of 2020's protests in the US and elsewhere have not, and it's clear that a newfound sense of organizational ethical responsibility will drive real change in how the world works. Our task will be to lead on what truly meaningful action looks like, marrying our business vision with our own sense of ethical purpose.

Heather Kernahan

CEO, HOTWIRE

Ultimately, a focus on health highlights how the human is being recentered in so much of the business world. When English speakers raise a glass, we say cheers; in most other languages I can think of, we toast to health or to life. With human needs and human connection as our north star, the conversations our industry enables will come back to health, in all its forms.

To me, this is nothing less than an incredible opportunity for positive, sustainable growth.

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