



ICCO
WORLD PR
REPORT
2022-2023

Agency views of the path ahead

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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 82 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 82 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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Francis Ingham

CHIEF EXECUTIVE
ICCO

This year's report is a robust reminder that our industry is enjoying a period of rapid growth, deserved recognition for what we do, and growing demand for our services, which sees no signs of slowing. However, challenges persist and the path to progress requires work, dedication, and investment.

Here are some observations.

Firstly, the future is bright but challenges remain.

PR leaders are optimistic, they reported considerable growth over the past twelve months and expect an increase in profitability next year. North America is especially optimistic about its future prospects. Of course, while we face a global recession, we can't forget the factors attributed to the industry's growth over the last two to three years: PR diversifying into broader market offerings, the rise of digital, CEOs investing more in organisational reputation, and a shift in budgets from advertising towards PR.

Whilst high demand is a huge opportunity, wherever you look in the world, the industry faces a stern test to recruit and retain talent. Just as it was in 2021, it was no surprise to see this year's World PR Report site recruitment and retaining key talent as a top challenge – up 7% from last year. The data suggests that sourcing talent from outside the industry is particularly problematic in the APAC and Africa regions, whereas it's easiest in the US. Europe sits in the middle. Winning the war on talent comes down to the ability to create a brand associated with success, personal growth, reward, satisfaction, and work-life balance.

It's a results business

So often comms leaders tell me they've never felt more valued. The role of PR has shifted from tactical towards the strategic and insightful. For PR to keep its seat at the top table it must continue to invest in measurement and evaluation tools, like AMEC, to prove its effectiveness and value. In turn, this will lead to higher salaries that competes with other industries.

Economic uncertainty may tighten some budgets, but clients and organisations will still be expecting a meaningful return for their investment. They are looking for organisational-relevant results that support their objectives, not to be serviced by those confusing meaningful evaluation with activity driven 'counts and amounts'.

Adopting to new technologies is essential to mastering data and analytics opportunities, but leaders this year rate adoption of new technologies at 6.3, a slight decrease from 2021, which was 6.5.

In an increasingly complex, fast-evolving world of technology, it is critical that PR professionals develop and maintain the knowledge required to not only advise their clients and employers on the risks and opportunities that new tech brings, but also know how they can incorporate these tools, like AI, in their own comms strategies.

Learning and embracing meaningful measurement approaches and best practice, as championed by AMEC and endorsed by ICCO, is the way to do this.

ESG remains centre stage

ESG is in the top two investment areas for every region of the world. This will only grow in importance as organisations seek to insulate themselves from unpredictability. Looking at the decade ahead, ‘strategic consulting’ and ‘purpose and ESG’ sit at the top of the most relevant skills needed for PR executives across the world.

In the last two years alone, we have had to contend with much. Just as we began to emerge from the global pandemic, the Russian invasion of Ukraine yielded profound impacts around the world.

Leadership response is central to the intense scrutiny organisations face in this field, which is reflected in CEOs increasing the importance they place on reputation management.

Our industry still does not reflect the society in which we operate. And it needs to.

The World Report shows just 30% of the respondents believe the industry reflects the ethnic demographics of the countries they serve. The UK – 12% – and Europe – 24% – appear to have the most work to do. Steps are being taken to change this, with 79% of agencies now having an inclusion and diversity policy – it was 55% in 2021. But this is only first steps. Much more needs to be done.

Our various diversity initiatives generated the following imperatives:

- organisations tracking progress and embedding accountability
- representation in positions of leadership
- gender, ethnicity and disability pay gap
- spotlighting industry trailblazers.

Having gender balanced board rooms is another clear objective, and I am pleased our member Global Women in PR has produced the GWPR Annual Index, detailing affirmative action to tackle this challenge, highlights of which are contained within this report.

For us to be able to speak and advise on how companies and brands can be inclusive, we must first walk the talk in the PR and comms industry. We have a responsibility to understand our role in building a fairer industry if we are to have a positive influence in society.

Mental health can no longer be ignored.

The pandemic opened our eyes to the scale of invisible suffering in the world; shaking loose any lingering illusion of invincibility. We can no longer look the other way. Worryingly, there was a 12% increase of respondents reporting to have had experienced a mental health issue compared to 2021. The UK, Latin America and the US rank the highest in reported experiences of poor mental health. In the background to all this is a quarter of agencies still don’t have a mental health policy in place.

But the picture isn’t entirely bleak. Respondents generally agree that the situation has improved, and the majority feel the support they receive from their company is effective. Creating a culture of support is a first step and one I hope the industry grasps with both hands and takes forward.

In conclusion

We have seen an elevation in the importance of the PR and communications role. Our members are assuming increasingly important responsibilities in advising, guiding, often stewarding, and executing complex programmes for their organisations. PR is no longer just media relations and content curation.

But to meet the challenges ahead, we must continue upskilling, embrace the latest in tech and analytics, be authentic and create an environment that will attract and retain talent. With this in focus, PR and communications will meet the increase in demand, raise our own standards, and in turn, the standards of our clients.



Jane Hales

CO-FOUNDER AND DIRECTOR
SAPIO RESEARCH

The chance to partner with ICCO on their World PR Report is not one that is granted to many. For that reason, we at Sapio Research are delighted to be partnering with the leading voice of public relations around the world. With this research, we want to help the PR world place themselves in as strong a position as possible going forward.

As 2022 draws to a close, PR agencies are facing a new set of challenges with a looming recession and cost of living crisis, set against the backdrop of political instability. Back in June our International [business barometer](#), found that 95% of Business Decision Makers concerned about a recession to some extent, with a fifth already feeling the effects of the economic downturn. Many companies will be tempted to cut their marketing spending, but the PR industry doesn't need to panic just yet.

In fact, PR professionals seem quite positive about their future, rating their confidence about the future growth of the industry 7.3/10 on average and bullish about an increase in agency profitability (7/10 on average).

This is perhaps a rosier picture than one might have thought, but firms have reason to keep positive. Businesses need them, now more than ever. One year after the Covid crisis began our UK barometer found nearly a third of companies had experienced a PR crisis. So, the recession may force them to constrain their communication budget, but at least one third of UK BDMs are aware that cutting it completely is detrimental.

Our latest barometer also saw a quarter of companies feeling less confident in their PR approach compared to before the pandemic, both a pressure and opportunity for agencies.

At the same time, this ICCO study shows there are internal issues to be considered. Agencies are contending with pressure to have a workforce that reflects the ethnic demographics of their country. Only 13% currently think that the industry does this. Positively, we have seen a sizeable increase from 2021 to 2022 of the percentage of agencies that have an inclusion and diversity policy (55% vs 79%) though.

The ICCO survey results also suggest an increased attention to ethics in PR. More agencies have signed a code of conduct and turned down clients for ethical reasons this year. Perhaps no surprise as 90% of respondents think that agencies have a responsibility to advise their client on ethical behaviour.

Despite this progress, the PR industry cannot rest on its laurels. There is still the issue of mental health. Since the 2021 study, an additional 12% of respondents have reported experiencing mental distress, but still over a quarter of agencies doesn't have specific mental health policies in place. PR is counted among the most stressful professions, and considering the proven costs of employee burnout, agencies are losing large sums of money if they don't take care of their employees' wellbeing. There are signs of improvement, but given the increasingly unstable global situation, improving employee wellbeing alongside increasing diversity could contribute to solving the industry's recruitment issue, and help meet this ever-growing demand for services".

So there are high pressures, yes, but also plenty of opportunities for the astute.

2022 RANK	2021 RANK	AGENCY	HQ	FEE INCOME 2021 (\$)	FEE INCOME 2020 (\$)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
1	1	Edelman	USA	984,921,000	840,022,000	6,004	17.20%	17.20%
2	2	Weber Shandwick	USA	860,000,000	820,000,000		4.90%	4.90%
3	3	BCW	USA	772,000,000	715,000,000		8.00%	8.00%
4	4	FleishmanHillard	USA	680,000,000	615,000,000		10.60%	10.60%
5	5	Ketchum	USA	550,000,000	500,000,000		10.00%	10.00%
6	6	Brunswick	UK	490,185,000	367,160,000	1,250	33.50%	35.50%
7	9	Real Chemistry	USA	475,000,000	360,000,000	1,848	31.90%	31.90%
8	16	Finsbury Glover Hering	USA	394,000,000	334,000,000	1,099	18.00%	18.00%
9	7	MSL	France	387,000,000	365,000,000	2,110	6.00%	6.00%
10	10	Hill+Knowlton Strategies	USA	370,000,000	345,000,000		7.20%	7.20%
11	8	BlueFocus	China	368,590,924	363,988,458	2,885	1.30%	-1.30%
12	11	Ogilvy	USA	366,000,000	337,000,000		8.60%	8.60%
13	17	MC Group	Germany	297,650,000	217,455,000	1,719	36.90%	36.90%
14	18	Vector Inc.	Japan	292,400,000	214,600,000	1,155	36.30%	36.30%
15	12	Golin	USA	282,000,000	252,000,000		11.90%	11.90%
16	14	FTI Consulting	USA	267,647,000	228,712,000	814	17.00%	17.00%
17	13	ICF Next	USA	215,408,957	232,770,338	1,178	-7.50%	-7.50%
18	19	Teneo Holdings	UK	200,000,000	170,000,000	1,000	17.60%	17.60%
19	25	ICR	USA	195,000,000	106,000,000	378	84.00%	84.00%
20	85	Evoke Kyne	USA	181,000,000	168,000,000	850	7.70%	7.70%
21	20	WE Communications	USA	172,600,000	149,100,000	1,302	15.80%	15.80%
22	21	APCO Worldwide	USA	172,398,000	142,960,000	926	20.60%	20.60%
23	n/a	D&S Media	China	171,274,471	143,523,180	953	19.30%	16.30%
24	24	Finn Partners	USA	162,202,666	108,897,017	1,032	49.00%	49.00%
25	22	Sunny Side Up Group Inc	Japan	145,840,434	103,166,904	328	41.40%	41.40%
26	27	GCI Health	USA	127,000,000	102,500,000	500	23.90%	23.90%
27	23	Syneos Health	USA	120,000,000	110,000,000	337	9.10%	9.10%
28	31	Zeno Group	USA	118,643,933	85,994,010	709	38.00%	38.00%
29	30	Ruder Finn	USA	112,200,000	87,775,000	860	27.80%	27.80%
30	29	SEC Newgate spa	Italy	106,186,819	96,351,773	696	10.20%	10.20%
31	26	Porter Novelli	USA	98,000,000	103,000,000		-4.90%	-4.90%
32	32	SKD Knickerbocker	USA	95,000,000	85,000,000	200	11.80%	11.80%
33	33	Allison+Partners	USA	93,300,000	78,700,000	447	18.60%	18.60%
34	28	FischerAppelt	Germany	82,650,000	84,233,680	597	-1.90%	5.00%
35	37	Prosek Partners	USA	80,050,000	62,000,000	299	29.10%	29.10%
36	35	Hopscotch Groupe	France	76,494,000	67,832,000	750	12.80%	20.70%
37	34	Marina Maher Communications	USA	73,000,000	69,000,000	181	5.80%	5.80%
38	36	Freuds	UK	72,079,200	63,526,900	293	13.50%	15.10%
39	84	Pomilio Blumm	Italy	69,599,280	31,110,000	257	123.70%	139.40%
40	39	Archetype	USA	65,500,000	56,000,000	650	17.00%	17.00%
41	38	Lewis	UK	63,450,000	61,650,000	370	2.90%	4.40%
42	47	LLYC	Spain	60,797,750	48,995,932	966	24.10%	32.80%
43	42	Grayling	UK	60,210,000	50,964,000	515	18.10%	19.90%
44		Grupo FSB	Brazil	58,379,351	48,552,700	471	20.20%	20.20%
45	40	Serviceplan PR Group	Germany	58,254,000	52,826,000	266	10.30%	18.00%
46	53	M Booth	USA	58,055,889	43,328,936	268	34.00%	34.00%
47	44	R&CPMK	USA	55,000,000	50,000,000	264	10.00%	10.00%
47	41	DKC Public Relations	USA	55,000,000	52,250,000	225	5.30%	5.30%
49	43	Global Strategy Group	USA	53,400,000	53,500,000	131	-0.20%	-0.20%
50	75	CYTS-LINKAGE	China	52,800,000	34,000,000	265	55.30%	55.30%

PROVOKE TOP 250 RANKINGS

2021 RANK	2020 RANK	AGENCY	HQ	FEE INCOME 2020 (\$)	FEE INCOME 2019 (\$)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
51	49	H&H Group	Sweden	50,500,000	47,000,000	318	7.40%	7.40%
52	46	Kyodo Public Relations	Japan	50,490,000	49,900,000	232	1.20%	12.40%
53	70	Adfactors PR Pvt Ltd	India	50,110,000	35,227,253	980	42.20%	42.20%
54	51	Joele Frank	USA	50,000,000	45,000,000	120	11.10%	11.10%
54	68	PRAP Japan	Japan	50,000,000	45,000,000	332	11.10%	11.10%
56		5W Public Relations	USA	49,997,947	38,092,948	245	31.30%	31.30%
57	73	Prain Global	Korea	49,075,262	34,127,832	278	43.80%	43.80%
58	78	Spectrum Science	USA	48,850,000	32,900,000	200	48.50%	48.50%
59	56	Hotwire	USA	48,223,657	41,748,611	293	15.50%	15.50%
60	54	SJR	USA	48,000,000	43,000,000	180	11.60%	11.60%
60	60	National PR	Canada	48,000,000	40,000,000	270	20.00%	20.00%
60	50	Dentsu Public Relations	Japan	48,000,000	46,000,000	360	4.30%	4.30%
60	44	Portland Communications	UK	48,000,000	50,000,000	270	-4.00%	-4.00%
64	52	Bully Pulpit Interactive	USA	47,200,000	43,600,000	186	8.30%	8.30%
65		MikeWorldWide	USA	45,390,416	38,878,161	207	16.80%	16.80%
66	66	Imre	USA	45,052,000	36,739,100	239	22.60%	22.60%
67	57	Ashfield Health	UK	43,605,000	41,648,000	238	4.70%	6.30%
68	83	Hunter Public Relations	USA	42,300,000	31,700,000	210	33.40%	33.40%
69	55	Kreab	UK/Sweden	42,180,000	42,700,000	400	-1.20%	5.70%
70		MHP Mischief	UK	42,120,000	37,949,000	195	11.00%	12.60%
71	80	Grupo Inpress	Brazil	41,826,596	32,048,623	663	30.50%	37.80%
72	74	Rud Pedersen	Sweden	41,472,928	34,120,000	295	21.60%	21.60%
73	62	Instinctif Partners	UK	41,391,000	38,360,000	289	7.90%	9.50%
74		Red Havas	USA	41,200,000	28,500,000	350	44.60%	44.60%
75	76	Kivvit	USA	39,436,298	34,899,714	110	13.00%	13.00%
76	59	Farner Consulting AG	Switzerland	38,317,224	40,073,667	176	-4.40%	2.30%
77	82	Current Global	USA	38,235,000	31,866,000	203	20.00%	20.00%
78	71	The Outcast Agency	USA	38,000,000	35,000,000	167	8.60%	8.60%
79	71	Carmichael Lynch Relate	USA	37,600,000	35,000,000	114	7.40%	7.40%
80	67	Four Communications Group	UK	37,128,470	36,737,649	310	1.10%	2.60%
81	77	French/West/Vaughan	USA	36,727,448	33,159,488	133	10.80%	10.80%
82	69	Padilla	USA	36,198,229	35,862,295	179	0.90%	0.90%
83	89	Coyne PR	USA	35,900,000	28,000,000	172	28.20%	28.20%
84	101	Precision	USA	35,529,332	23,354,375	121	52.10%	52.10%
85	98	Day One Agency	USA	35,000,000	23,806,648	150	47.00%	47.00%
86	86	Hanover Communications	UK	34,425,000	30,003,000	182	14.70%	16.40%
87	88	PR One	South Korea	33,599,328	28,879,567	185	16.30%	16.30%
88	91	ATREVIA	Spain	31,948,532	26,525,003	398	20.40%	28.90%
89	104	Matter Communications	USA	30,116,000	22,500,000	254	33.80%	33.80%
90	93	Fahlgren Mortine	USA	30,039,544	24,991,701	188	20.20%	20.20%
91		Dentons Global Advisors	USA	30,000,000		235	n/a	n/a
92	108	Walker Sands	USA	29,961,330	21,258,121	180	40.90%	40.90%
93	87	Crosby	USA	29,421,739	29,092,172	99	1.10%	1.10%
94	64	achtung!	Germany	29,412,000	37,234,400	180	-21.00%	-15.50%
95	97	Highwire Public Relations, Inc.	USA	29,312,000	24,162,000	116	21.30%	21.30%
96	100	Citizen Relations	USA	29,123,190	22,717,370	185	28.20%	28.20%
97	79	Gullers Grupp	Sweden	28,142,400	32,939,160	194	-14.60%	-6.80%
98	81	DeVries Global	USA	28,000,000	32,000,000	135	-12.50%	-12.50%
99	94	Oliver Schrott Kommunikation	Germany	27,827,400	24,790,400	223	12.30%	20.10%
100	105	Headland Consultancy	UK	27,690,927	22,297,493	116	24.20%	26.00%

2021 RANK	2020 RANK	AGENCY	HQ	FEE INCOME 2020 (\$)	FEE INCOME 2019 (\$)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
101	96	M&C Saatchi Sport & Entertainment	UK	27,599,654	24,192,830	186	14.10%	15.80%
102	102	Havas Formula	USA	26,718,617	22,673,654	152	17.80%	17.80%
103	109	Brands2Life	UK	26,437,050	21,137,730	174	25.10%	26.90%
104	99	PAN Communications	USA	26,131,000	23,200,000	209	12.60%	12.60%
105	120	Praytell	USA	25,500,000	17,900,000	133	42.50%	42.50%
106		The Next Practices Group	USA	25,100,000	16,700,000	120	50.30%	50.30%
107		medicom	South Korea	25,000,000	28,000,000	180	-10.70%	-10.70%
108	92	G&S Business Communications	USA	24,802,633	25,111,105	153	-1.20%	-1.20%
109	116	InkHouse	USA	24,782,746	18,800,000	125	31.80%	31.80%
110	90	FAKTOR 3 AG	Germany	24,339,000	24,766,000	231	-1.70%	5.20%
111	110	Jackson Spalding	USA	24,045,390	20,902,405	118	15.00%	15.00%
112	107	Citigate Dewe Rogerson	UK	22,950,000	21,372,000		7.40%	9.00%
113	118	V+O	Greece	21,702,215	18,644,289	183	16.40%	24.60%
114	113	Taylor	USA	21,600,000	19,700,000	92	9.60%	9.60%
115	106	Strategic Public Relations Group	Hong Kong	21,100,000	21,630,000	208	-2.50%	-2.50%
116	130	The Hoffman Agency	USA	20,158,000	15,115,000	194	33.40%	33.40%
117	127	W	UK	19,845,000	15,481,000	141	28.20%	30.10%
118	115	Proof Strategies	Canada	19,750,000	19,365,894	130	2.00%	0.70%
119	111	Barabino & Partners	Italy	19,380,000	20,740,000	105	-6.60%	0.00%
120	120	Regan	USA	19,143,913	18,000,000	118	6.40%	6.40%
121	114	Faktenkontor Group	Germany	19,095,000	19,373,600	150	-1.40%	5.50%
122	150	LaForce	USA	19,000,000	12,628,764	118	50.50%	50.50%
122	131	Mission North	USA	19,000,000	15,000,000	103	26.70%	26.70%
124	124	The Red Consultancy	UK	18,512,550	16,988,000	133	9.00%	10.60%
125	142	KPR & Associates	South Korea	18,416,289	13,738,642	119	34.00%	34.00%
126	135	Method Communications	USA	18,352,958	14,761,362	79	24.30%	24.30%
127	126	LaunchSquad	USA	18,328,796	16,376,510	114	11.90%	11.90%
128	141	JIN	France	17,898,000	13,786,000	80	29.80%	38.90%
129	131	KWT Global	USA	17,800,000	15,000,000	85	18.70%	18.70%
130	152	Vested	USA	17,543,000	12,409,000	98	41.40%	41.40%
131	133	Powerscourt	UK	17,415,000	14,933,000	57	16.60%	18.30%
132	129	Lansons	UK	17,408,394	14,295,231	84	21.80%	21.80%
133	177	LDWW	USA	17,392,144	10,256,718	60	69.60%	69.60%
134	117	Premier	UK	17,135,550	18,697,760	125	-8.40%	-7.00%
135	151	Argyle	Canada	17,089,788	12,589,521	110	35.70%	34.00%
136	123	Levick Strategic Communications	USA	17,000,000	17,000,000	70	0.00%	0.00%
137	122	Geelmuyden.Kiese Group	Norway	16,950,000	17,550,000	145	-3.40%	0.00%
138	134	JPA Health Communications	USA	16,900,782	14,848,067	80	13.80%	13.80%
139	170	Lambert	USA	16,671,000	10,647,000	88	56.60%	22.10%
140	138	M Booth Health	USA	16,290,421	14,433,794	51	12.90%	12.90%
141	167	Gregory FCA	USA	16,287,822	10,800,000	81	50.80%	50.80%
142	149	C+C	USA	16,266,920	12,728,303	86	27.80%	27.80%
143	128	The Zimmerman Agency	USA	16,200,000	15,400,000	44	5.20%	5.20%
144	137	rbb Communications	USA	15,979,737	14,494,656	82	10.20%	10.20%
145	139	Marathon Strategies	USA	15,516,883	14,732,231	48	5.30%	5.30%
146	207	PIABO PR	Germany	15,000,000	7,500,000	73	100.00%	100.00%
147	171	Marco	Spain	14,818,290	10,634,042	165	39.30%	49.10%
148	143	No Fixed Address	Canada	14,615,000	13,650,000	60	7.10%	5.70%
149	192	Clarity PR	USA	14,435,626	9,035,115	93	59.80%	59.80%
150	153	Citypress	UK	14,175,000	12,467,000	97	13.70%	15.40%

PROVOKE TOP 250 RANKINGS

2021 RANK	2020 RANK	AGENCY	HQ	FEE INCOME 2020 (\$)	FEE INCOME 2019 (\$)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
151	136	DNA Communications	USA	14,000,000	14,500,000	100	-3.40%	-3.40%
152		Wachsmann	USA	13,959,000	6,089,000	105	129.20%	129.20%
153	156	JeffreyGroup	USA	13,886,967	12,210,949	305	13.70%	13.70%
154	147	Shift Communications	USA	13,800,000	13,100,000	66	5.30%	5.30%
155	146	CROS	Russia	13,727,000	13,324,000	65	3.00%	3.00%
156	165	Hope&Glory	UK	13,687,759	10,982,358	87	24.60%	26.50%
157	163	Palmer Hargreaves	Germany	13,600,200	11,297,200	153	20.40%	28.80%
158	169	BECG Group	UK	13,512,542	10,709,852	82	26.20%	28.00%
159	148	RFIBinder	USA	13,500,000	12,900,000	55	4.70%	4.70%
160	166	TRACCS	Saudi Arabia	13,200,000	10,830,000	220	21.90%	21.90%
161	145	Wellcom	France	12,540,000	13,420,000	120	-6.60%	0.00%
162	232	Bospar	USA	12,403,000	6,282,000	82	97.40%	97.40%
163	173	Narva Communications AB	Sweden	12,340,000	10,452,000	56	18.10%	18.10%
164	188	J Public Relations	USA	12,118,000	9,100,000	79	33.20%	33.20%
165	155	Markenzeichen	Germany	12,084,000	12,285,400	81	-1.60%	5.30%
166	198	Another	Mexico	11,756,600	8,479,214	226	38.70%	38.70%
167	119	ORCA Agenturgruppe	Germany	11,639,400	18,324,400	112	-36.50%	-32.00%
168	157	Tact Intelligence-conseil	Canada	11,534,000	11,388,000	86	1.30%	16.80%
169	160	Davies	USA	11,500,000	11,750,000	34	-2.10%	-2.10%
170	175	Harvard	UK	11,488,094	10,338,341	98	11.10%	12.80%
171	199	Apple Tree Communications	Spain	11,286,570	8,416,475	112	34.10%	43.50%
172	226	Icon Agency	Australia	11,229,391	6,678,098	80	68.20%	84.30%
173	205	Monet + Associes	France	11,217,600	8,161,800	97	37.40%	47.10%
174	180	MP&F Public Relations	USA	11,047,861	9,931,000	70	11.20%	11.20%
175	202	Aspectus	UK	11,022,750	8,220,000	73	34.10%	36.10%
176	168	Action Global Communications	Cyprus	10,900,000	10,700,000	169	1.90%	1.90%
177	181	Haebmau	Germany	10,841,400	9,882,000	109	9.70%	17.40%
178	162	First House	Norway	10,830,000	11,590,000	35	-6.60%	0.00%
179		Styleheads	Germany	10,773,000	10,126,000	117	6.40%	13.90%
180	195	Octopus Group	UK	10,665,000	8,631,000	72	23.60%	25.40%
181	186	Moore Inc	USA	10,638,221	9,462,495	41	12.40%	12.40%
182	158	Racepoint Global	USA	10,400,000	12,000,000	52	-13.30%	-13.30%
183	174	Lift World	Portugal	10,260,000	10,370,000	114	-1.10%	5.90%
184	193	Threepipe Communications	UK	10,125,000	9,042,000	80	12.00%	13.60%
185	164	Diplomat Group	Sweden	10,120,000	11,040,000	110	-8.30%	0.00%
186		Verge Scientific Communications	USA	10,100,000	4,500,000	35	124.40%	124.40%
186		ROKK Solutions	USA	10,100,000	4,600,000	32	119.60%	119.60%
188	176	360PR+	USA	10,050,300	8,575,220	59	17.20%	17.20%
189	190	Good Relations	UK	10,029,150	8,895,410	65	12.70%	14.40%
190	184	Veritas	Canada	10,000,000	9,500,000	65	5.30%	5.30%
191	193	Thrive PR & Communications	Australia	9,849,007	8,704,381	81	13.10%	24.00%
192		Axon Communications	UK	9,824,000	9,688,000	74	1.40%	1.40%
193	206	Sam Brown	USA	9,741,816	8,000,000	53	21.80%	21.80%
194	184	DCI	USA	9,500,000	9,500,000	55	0.00%	0.00%
194	179	GoodIdea Media	China	9,500,000	10,000,000	100	-5.00%	-5.00%
196	218	Merritt Group	USA	9,410,209	7,500,000	44	25.50%	25.50%
197	209	Segmenta Communications	Germany	9,393,600	7,978,800	92	17.70%	26.00%
198		Clyde Group	USA	9,306,754	5,465,098	52	70.30%	70.30%
199	208	PLMR	UK	9,223,648	7,981,987	58	15.60%	17.30%
200	216	PrettyGreen	UK	9,180,000	7,569,250	37	21.30%	23.10%

2021 RANK	2020 RANK	AGENCY	HQ	FEE INCOME 2020 (\$)	FEE INCOME 2019 (\$)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
201	200	Peppercomm	USA	9,166,850	8,313,000	29	10.30%	10.30%
202	204	Greentarget Global Group	USA	9,150,000	8,184,000	48	11.80%	11.80%
203	210	SenateSHJ	New Zealand	9,147,786	7,893,388	46	15.90%	15.90%
204	183	LVT Group	Netherlands	9,120,000	9,760,000	75	-6.60%	0.00%
205	238	Taylor Herring	UK	9,045,000	6,302,000	45	43.50%	45.70%
206	194	Grupo CDI	Brazil	9,036,000	7,030,000	235	28.50%	35.70%
207	189	komm.passion	Germany	9,017,400	9,089,000	66	-0.80%	6.20%
208	187	Mitchell	USA	9,000,000	9,127,102	37	-1.40%	-1.40%
209	203	MMGY NJF	USA	8,993,878	8,203,073	60	9.60%	9.60%
210	201	Hot Paper Lantern	USA	8,900,000	8,260,000	33	7.70%	7.70%
211	227	Navos	Germany	8,664,000	7,015,000	62	23.50%	32.20%
212		SourceCode Communications	USA	8,588,900	5,168,512	38	66.20%	66.20%
213	237	Dukas Linden Public Relations	USA	8,510,029	6,381,400	30	33.40%	33.40%
214	211	Madano Partnership	UK	8,505,000	7,946,000	49	7.00%	8.60%
215	218	Stanton	USA	8,500,000	7,500,000	32	13.30%	13.30%
215	197	Max Borges Agency	USA	8,500,000	8,500,000	49	0.00%	0.00%
217	248	Berk Communications	USA	8,487,507	5,707,363	28	48.70%	48.70%
218	221	Lou Hammond Group	USA	8,328,815	7,350,509	40	13.30%	13.30%
219	182	90TEN	UK	8,268,420	9,857,749	49	-16.10%	0.80%
220	230	Red Lorry Yellow Lorry	UK	8,100,000	6,850,000	50	18.20%	20.00%
220	220	Nelson Bostock Unlimited	UK	8,100,000	7,398,000	62	9.50%	11.10%
222	257	Firehouse Strategies	USA	8,039,000	6,413,000	17	25.40%	25.40%
223	217	M&C Saatchi Talk	UK	7,830,000	7,511,988	54	4.20%	5.80%
224	260	Jeschenko MedienAgentur	Germany	7,809,000	9,198,800	38	-15.10%	-9.20%
225	260	URBAN Grupo de Comunicacion	Argentina	7,803,300	5,423,485	125	43.90%	43.90%
226	225	Evercom	Spain	7,558,200	7,090,640	85	6.60%	14.10%
227	n/a	UTOPIA Lab S.r.l.	Italy	7,486,353	6,359,083	58	17.70%	26.00%
228	246	Trigger Oslo	Norway	7,410,000	5,856,000	40	26.50%	35.40%
228	212	LHLK	Germany	7,410,000	6,734,400	59	10.00%	17.80%
228	213	Kaltwasser Kommunikation	Germany	7,410,000	7,917,800	58	-6.40%	0.20%
228	212	EMG	The Netherlands	7,410,000	7,930,000	43	-6.60%	0.00%
232	215	Pierpont Communications	USA	7,385,651	6,800,000	31	8.60%	8.60%
233	224	CP/partner	Germany	7,375,800	7,124,800	70	3.50%	10.80%
234	214	Infinite Global	USA	7,325,323	5,600,000	34	30.80%	30.80%
235	236	Trevelino/Keller	USA	7,100,000	4,886,767	38	45.30%	45.30%
235	176	Mower	USA	7,100,000	10,265,655	30	-30.80%	-30.80%
237	229	Kirchhoff Consult	Germany	7,068,000	7,076,000	55	-0.10%	6.90%
238	249	Approach	Brazil	7,020,000	5,700,000	161	23.20%	30.00%
239	298	The Romans	UK	6,885,000	3,685,300	52	86.80%	89.60%
239	245	Manifest	UK	6,885,000	4,110,000	43	67.50%	70.00%
241	235	Fink & Fuchs AG	Germany	6,874,200	6,539,200	62	5.10%	12.50%
242	222	AMI Communications	Czech Republic	6,840,000	7,320,000	85	-6.60%	0.00%
242	222	Thomas Marko & Associates	France	6,840,000	7,320,000	36	-6.60%	0.00%
244	236	Whyte Corporate Affairs	Belgium	6,773,880	6,446,480	31	5.10%	12.50%
245	246	Value 360 Communications	India	6,721,416	3,656,350	285	83.80%	83.80%
247	241	The Academy	UK	6,615,000	6,069,100	56	9.00%	10.60%
247	245	Engel & Zimmermann	Germany	6,703,200	6,380,600	50	5.10%	12.40%
248	248	Lumina Communications	USA	6,432,200	5,200,000	34	23.70%	23.70%
249	249	Circle	UK	6,415,200	4,816,920	45	33.20%	35.20%
250	250	Global Gateway Advisors	USA	6,400,000	4,500,000	25	42.20%	42.20%



GLOBAL RESULTS

These results are based on findings from an online survey conducted between July and October 2022.

271 PR professionals were surveyed from the following regions:

Africa
Asia-Pacific
Europe
Latin America*

Middle East
North America*
United Kingdom

*Sample sizes between 20-30 participants

Perceived growth and opportunity



2022
2021

Base: 271 (2022) / 260 (2021)
Q: Tell us how much you agree with these statements on a scale of 1 to 10, where 1 = strong disagreement and 10 = strong agreement.

*non-traditional services include advertising, digital, online communications, word-of-mouth, public affairs, or wider communication strategy

Average levels of agreement on a 10 point scale

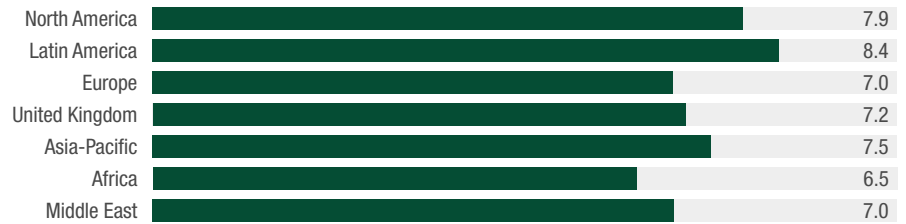
I am optimistic about the growth of the public relations market in my country



I expect an increase in agency profitability this year



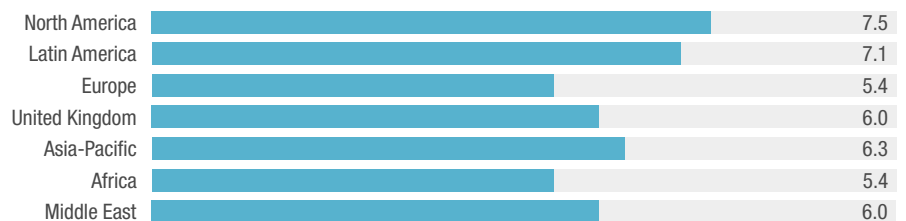
Corporate CEOs in my country take corporate reputation seriously



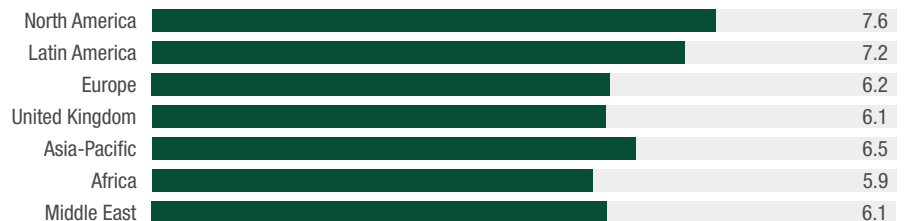
Companies in my country are paying more attention to corporate purpose



Marketers in my country are spending more money on public relations relative to communications disciplines



Clients in my country are confident in using public relations to lead non-traditional services such as advertising, digital, online communications, word-of-mouth, public affairs, or wider communication strategy



PR agencies in my country are successfully addressing client digital needs

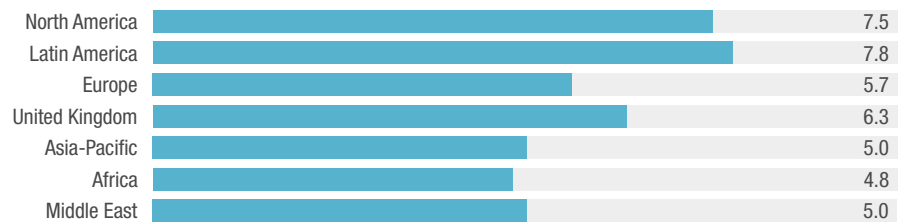


Base: 271

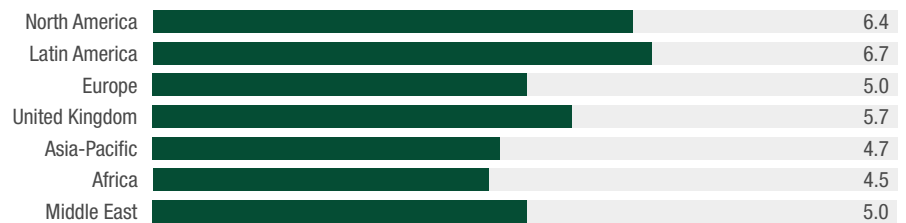
Q: Tell us how much you agree with these statements as they relate to your country on a scale of 1 to 10, where 1 = strong disagreement and 10 = strong agreement.

GROWTH OPPORTUNITY

There is a plentiful supply of talent in my country



The PR industry in my country 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 in my country operates ethically



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



Base: 271

Q: Tell us how much you agree with these statements as they relate to your country on a scale of 1 to 10, where 1 = strong disagreement and 10 = strong agreement.

Expected areas of investment



ESG (Environmental, Social, and Governance)

2022: 44% (2021: 32%)



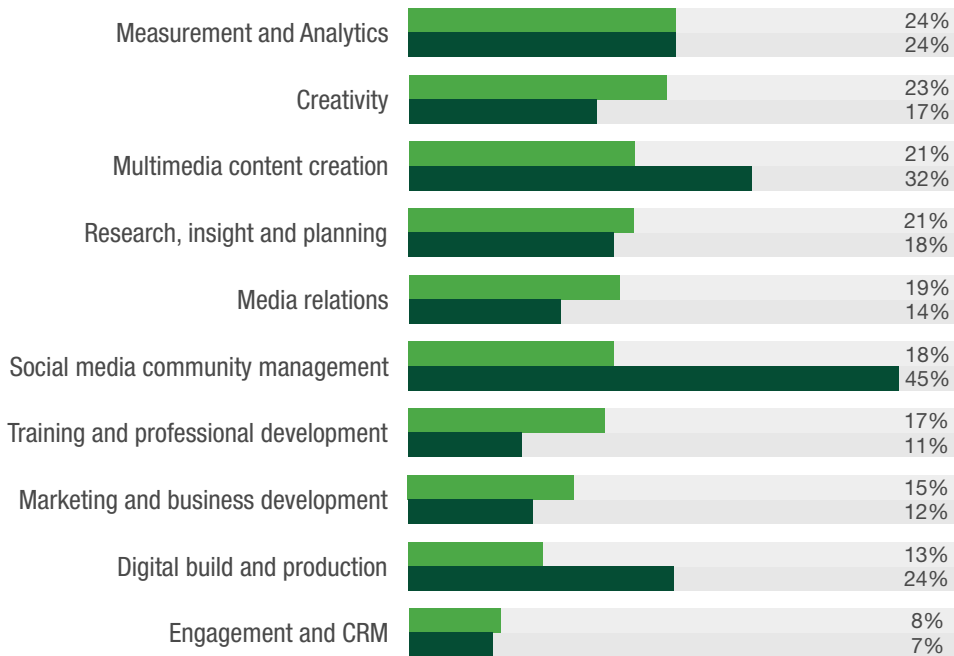
Influencer communications

2022: 36% (2021: 29%)



Strategic Consulting

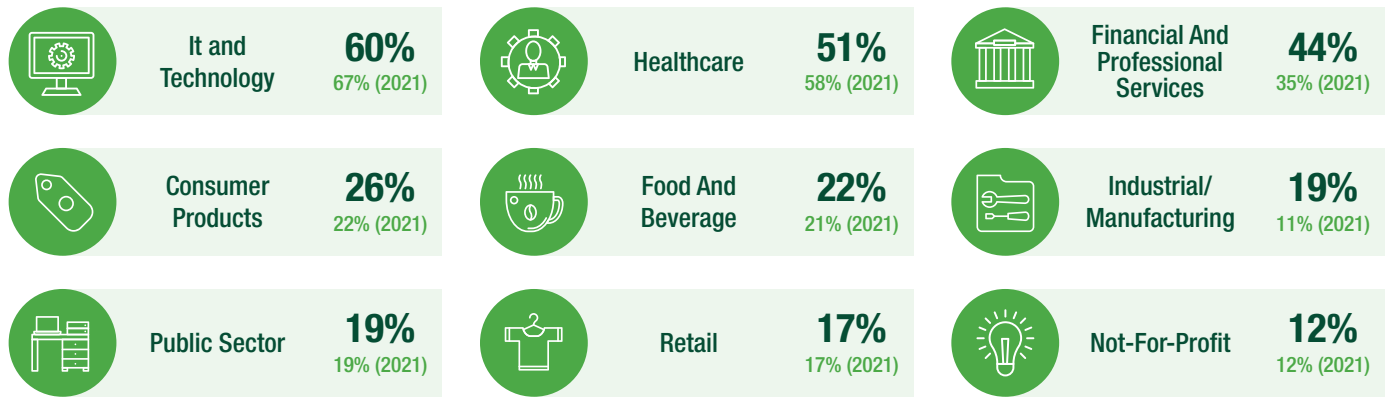
2022: 30% (2021: 25%)



Base: 271 (2022) / 260 (2021)
Q: In which of the following business areas do you expect an increase in PR firms' investment this year? (Top 3)

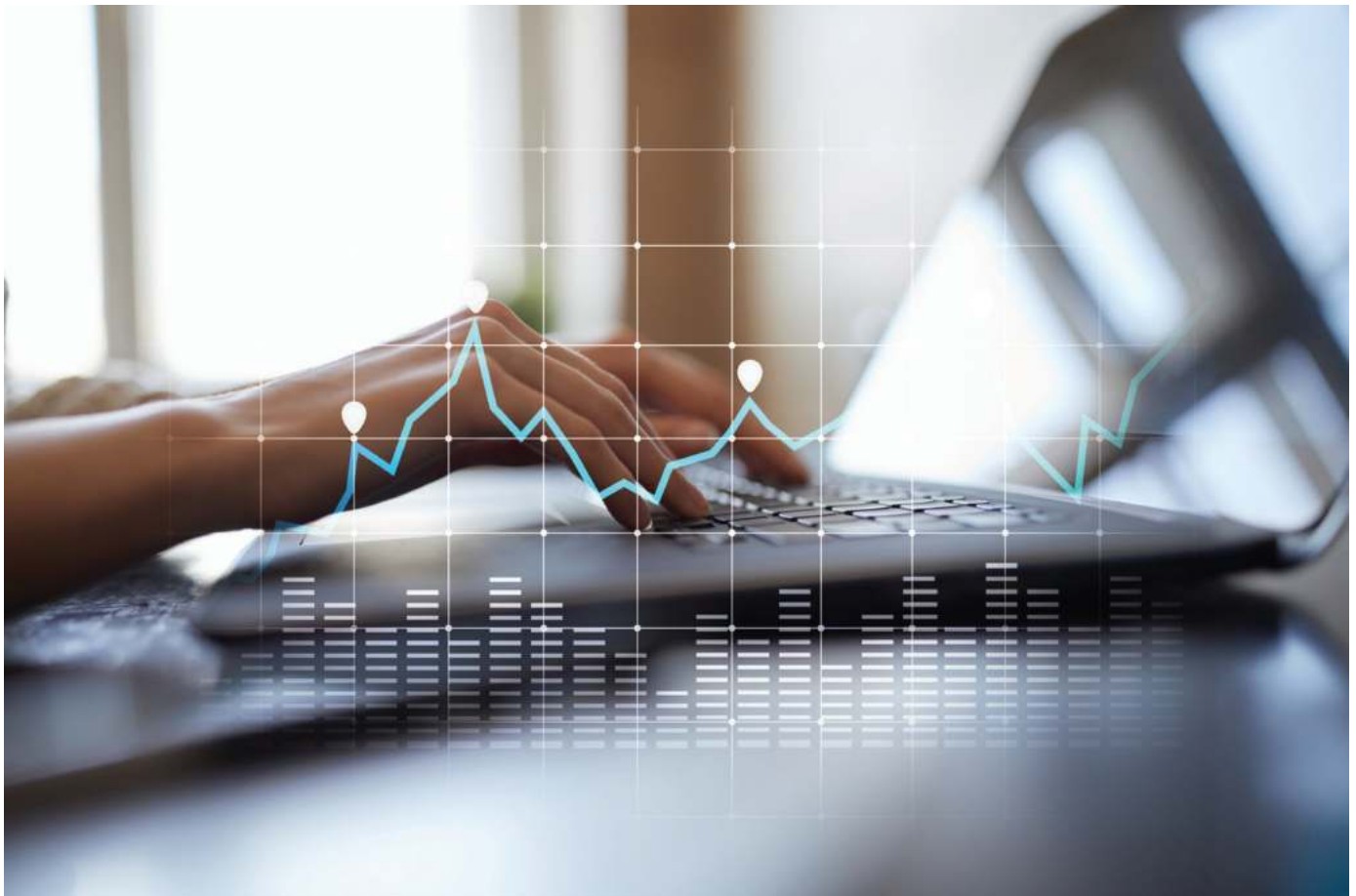
GROWTH OPPORTUNITY

Expected industry sector growth over the next 5 years

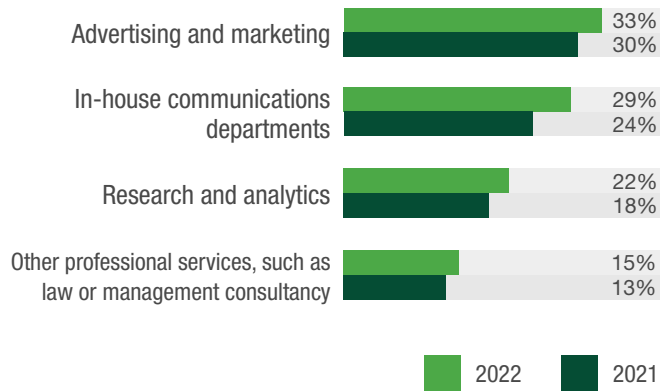
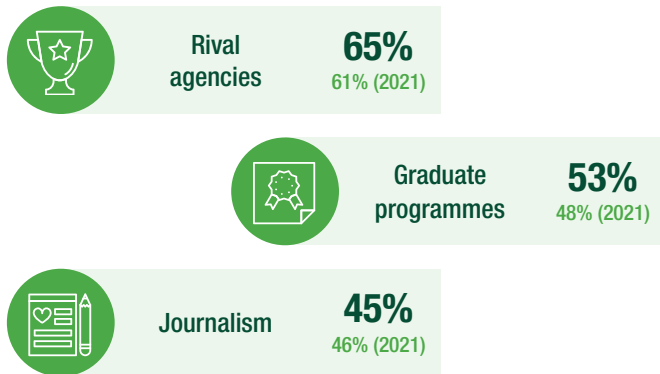


Base: 271 (2022) / 260 (2021)

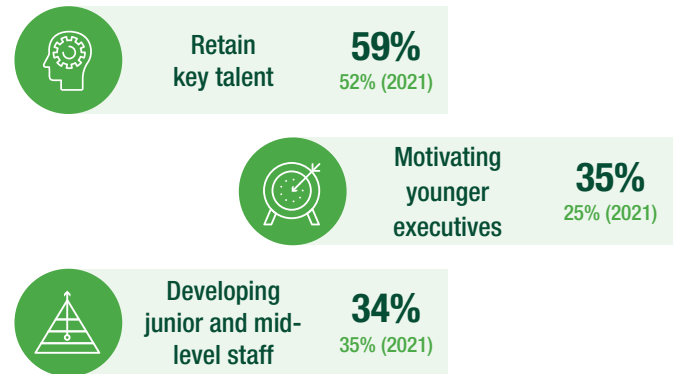
Q: In which of the following industry sectors do you expect to see the most growth over the next five years? (Top 3)



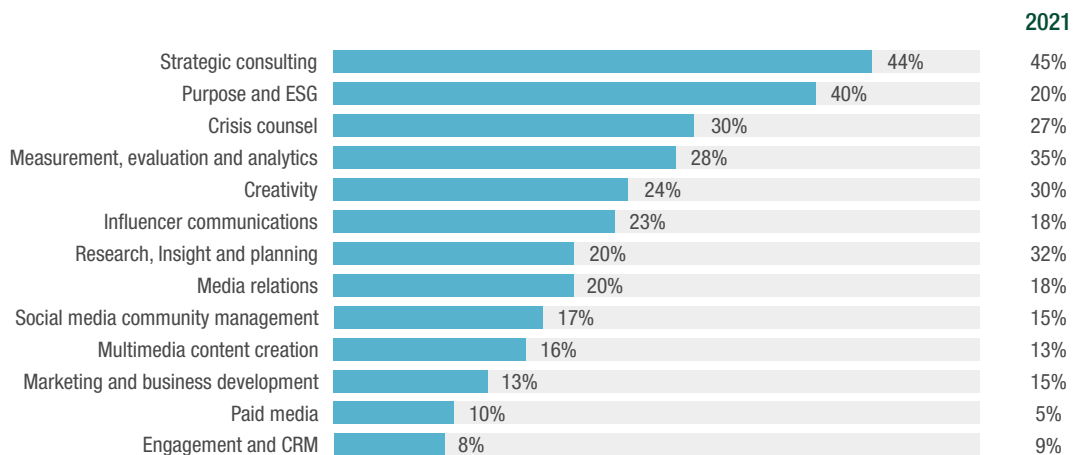
Expected to source talent from



Talent strategy challenges



Most valuable skills sets for the future



Base: 271 (2022) / 260 (2021)

Q: Looking at the next decade, which skill sets will be most relevant for PR executives in your country? (Top 3)



Rohan Shah

CO-FOUNDER AND MANAGING
DIRECTOR, REUBEN SINCLAIR

“The last two years has led a lot of individuals to reevaluate what they want from their job and from life”

The report suggests that the global picture is mixed, although there are certain concerns shared equally by PR firms around the world. 73% of PR firms expressed optimism about the health of the industry and 70% expected profitability to rise, yet half of those with a positive outlook acknowledged the threat from current global economic conditions. Just as it was in 2021, it was no surprise to see recruitment and retention in the top 3 challenges for PR firms across the globe.

The jobs market in the UK is almost uniquely weighted in favour of candidates because of the skills shortage that has led to demand outstripping supply. The report suggests that the two main sources of new appointments remain the same as 2021; this is by attracting talent from competitors or through graduate programs. These are cited, respectively, by 65% and 53% of respondents, percentages which have risen by four or five points each since 2021.

Although the economic environment is clearly an obstacle to growth, issues of recruitment and retention emerge as significant concerns. There are other difficulties related to client expectations and an unwillingness to commit sufficient funds to PR projects, but it's the restricted access to talent which seems most likely to hold back expansion.

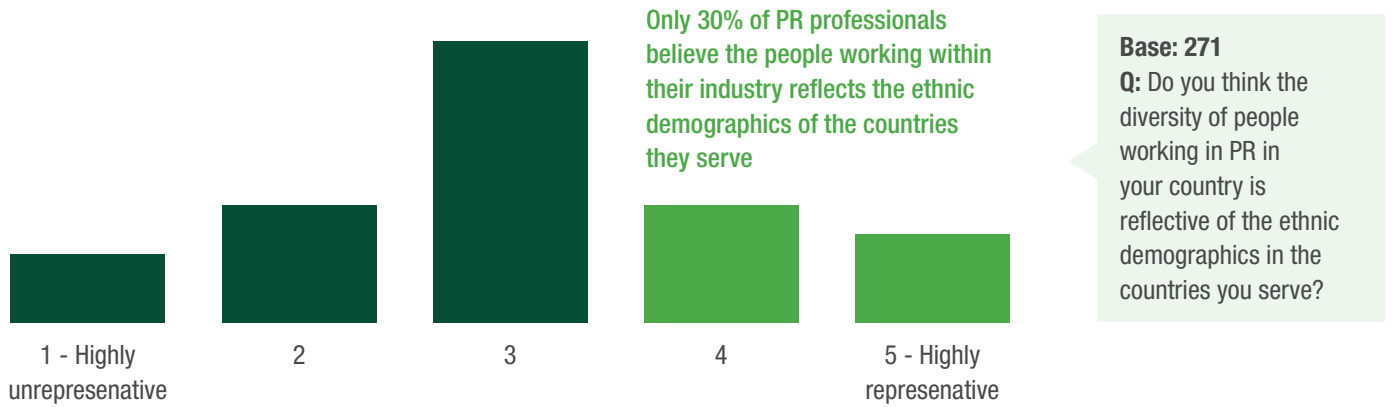
If PR firms are relying largely upon professionals already in the sector plus some extra input from graduate trainees, it makes sense to look outside the sector for people with the potential, if not the experience or training.

It seems hardest to do in Africa, the Middle East and Asia-Pacific, whereas it's easiest in the USA. Europe sits somewhere in the middle. If done well however, this is a creative way of augmenting PR teams, which takes time and investment but can encourage employee loyalty at an early stage, thereby minimising employee turnover. The new survey identifies that retaining talent is the single biggest challenge facing all markets currently and this is a very real challenge – A recent McKinsey survey of 13,000 employees globally suggested that circa 40% of employees might leave their jobs in the next 3-6 months. The last two years has led a lot of individuals to reevaluate what they want from their job and from life; it would seem that now more than ever a focus on personal priorities comes before work. Employers embracing a radical level of flexibility by allowing employees to fulfil their personal priorities and commitments whilst working are the ones likely to overcome the retention challenge, as well as being more attractive to talent seeking work or considering options. Employees want to be seen as people, not just workers; value is more than a benefits package, people want a person first understanding. If you are to truly overcome the retention challenge, you must start by understanding your employee personas and deliver accordingly. Of course, we can't overlook Internal promotions as another option. However, roughly a third of firms reported that motivating younger executives and developing junior and mid-level staff is more challenging than hiring at both senior and junior levels.



As ever, ICCO has produced a very authoritative and wide-ranging overview of the PR industry, a discipline which provides one of the most important B2B services in modern commerce. With this service being nothing without the people in your business, it's precisely why your recruitment and retention strategies should be top of your agenda for 2023.

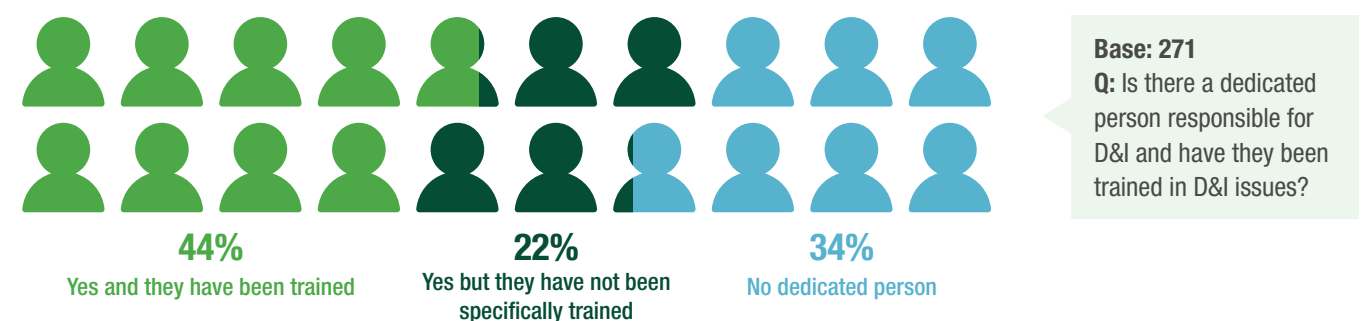
Diversity - reflecting ethnicity demographics by region



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



Dedicated people for Diversity and Inclusion



DEI IS NOT A SPRINT OR A MARATHON, IT IS NOT A SPORT! IT IS A SOCIAL JUSTICE ISSUE



Sudha Singh, FPRCA

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 reality is that dismantling systemic racism or embedding inclusion in an organisation is not as easy as it is made out to be. But, November 2022 seems to be a good mid-point to assess progress after the tragic killing of George Floyd, when organisations scrambled to showcase their DEI credentials. Have we made real progress or has it all been largely performative?

Research and anecdotal evidence indicates that progress has by and large stalled, that organisations have focused on the quick wins - to be seen to be on the right side of history and public opinion. There has been distinct effort on increasing diverse hires, on numbers but missing out the equity and inclusion piece by a long mile. All this because organisations have not factored in the financial commitment, manpower and time required for real change.

However, data from the recent ICCO World PR Report indicates that it is not all doom and gloom, there is heightened awareness about inequalities faced by marginalised groups. The good news is that more agencies (79% in 2022 as compared to 55% in 2021) than ever before have a DEI policy and a dedicated person (66%) in place for D&I. The bad news - DEI polices at the end of the day can just be a tick in the box. And the reality is that over a quarter of these persons are not trained specifically to deliver on their role, which seems rather counterintuitive - it's like setting them up and any DEI initiative for failure.

In terms of trends, there is no specific pattern to be discerned in different geographies. The UK performs the best on percentage of organisations with a DEI policy at 98%, followed by Latam (93%), Africa (84%), North America (86%).

Surprisingly Europe is at the bottom of the table at 55% - not great news for a geography that prides itself on inclusion. The other positive trend is that 18% of those surveyed have introduced measurement this year. This has been the big missing piece - without measurement there can be no accountability and it would be difficult to discern the impact of any initiatives. For change to be substantive and sustainable, we need more organisations to embed measurement into the design of their DEI programmes.

Despite the disproportionate focus on diverse hires, numbers and representations, only 30% of PR professionals believe the people working within their industry reflects the ethnic demographics of the communities they serve. And only 13% believe that the industry is highly representative. The statistics are disappointing and should be taken as a wake up call by leaders - numbers on their own are not going to help us remove inequalities, hiring diverse talent on its own is not the magic fix. HR-focused writer Riia O'Donnell describes it this way, "If diversity is the noun, then inclusion and belonging are the verbs that make it happen. You can hire as many people from disparate backgrounds as you like, but if they don't believe they belong, or if their points of view are not included in the culture, you're just checking off items on a list."

Elsewhere in the report, talent retention comes up as one of the biggest challenges faced by agencies across geographies at 59% up 7% from last year. Are these figures indicative of the absence of workplaces that foster belonging; or cultures of microaggressions; or pay inequity? Unfortunately, for the longest time organisations have been focusing on diversity as a way to correct institutional and historic inequalities. Organisations need to focus on equity inspired designs for bringing about that change - to creating equitable workplaces where talented people can thrive, no matter where they come from, what they look like. It is important to understand that Inclusion/ belonging, is an outcome and has diversity at its core - do people feel valued, can they bring their true self to work? What is their experience of the workplace? Do they belong?

It is no coincidence that clients are prioritising sustainability and the environment (62%), followed by diversity and inclusion (45%). Clearly, this is in line with global trends, they are responding to the growing demand from employees,/ customers to commit to a higher purpose and drive societal change. In this decade of reporting, it is crucial that as an industry, we step up, move beyond talking about DEI as 'nice to have' and frame it as a fundamental building block of social justice and a human rights concern.

We live in a world in a state of constant turmoil, increasing inequalities of income and access.

As advisors to C-Suite it is our responsibility to maintain momentum to banish discrimination, in equality and inequity from our industry.

The time for excuses is gone, if as an industry we want to thrive, innovate, be sustainable and be able to attract and retain diverse talent - it is important that we speak as one on this issue and hold ourselves accountable. The task is not onerous if we as an industry are purpose led and keep our eyes fixed on the prize : fairer workplaces and a fairer society.

Here are some actions to move the needle...

1

The homogeneity check, can you be accused of homophily?: Do all employees look similar; come from similar backgrounds - education, wealth? Broaden the talent pool; be creative about accessing diverse talent; have inclusive job adverts and create a culture where employees feel they can speak up and belong.

2

Who is in the leadership team: If everyone looks similar create a shadow board of diverse employees. If junior people from underrepresented communities do not see people like them, in leadership positions they are not going to stick around.

3

Pay transparency and fairness: Do your job ads have salary details? Are you paying on par with industry standards or below?; Have you taken into account the cost of living crisis?; Do you pay your interns and apprentices?

4

Have you aligned your DEI vision with your organisational/business purpose?: We measure business success through client wins; profits and employee retention. How do you measure your DEI success? Align the KPIs with business purpose and leadership.

5

Collaborate: Are you aware of industry benchmarks and best practice?; Are you a part of an industry body? Do you collaborate with your peer group to solve problems? - You don't have to do it on your own: Hire an external expert to take you on the journey

6

And last but not the least put your vision out in the open. Talk about it, talk about the challenges, talk about the failures, talk about the wins and how you are going to persevere to build an inclusive industry.

MENTAL WELLBEING IN THE WORKPLACE

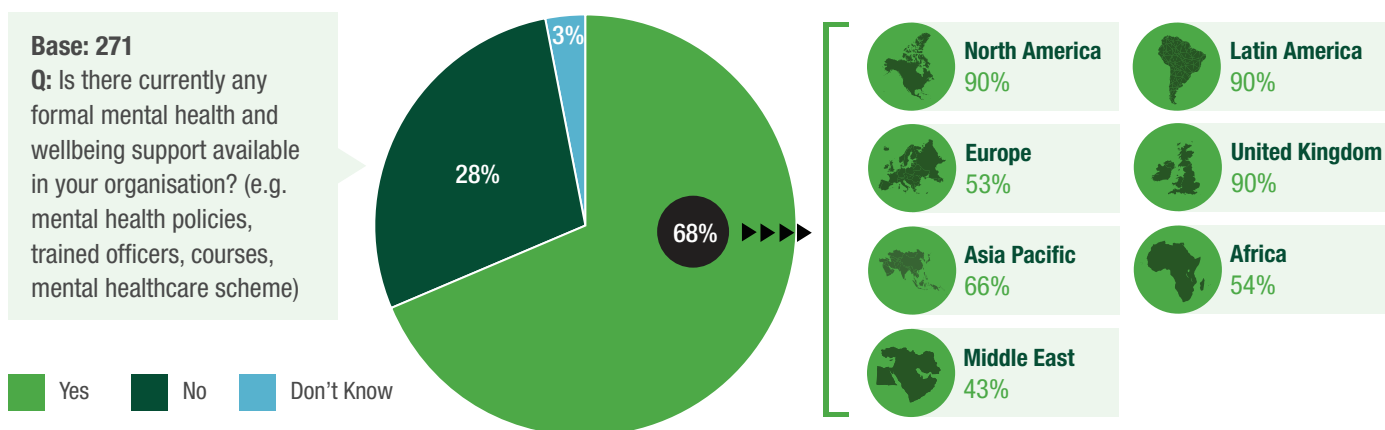
% of participants that have experienced mental health problems



Base: 271

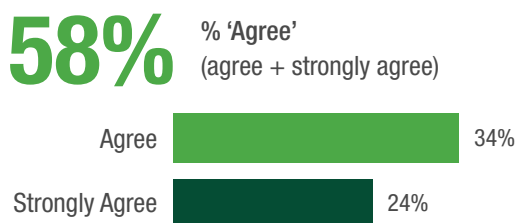
Q: Have you experienced any mental health problems in the last 12 months?

% of firms that have formal mental health and wellbeing support

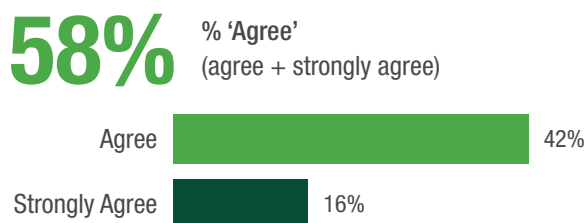


% that agreed with the following statements

The mental health support from my organisation is effective in tackling mental health issues



Mental health support from my organisation has improved over the last 12 months



Most used B2C Social media platform



45% Instagram
(37% in 2021)



20% Facebook
(30% in 2021)



10% LinkedIn
(9% in 2021)

Twitter 9% | TikTok 6% | Youtube 4% | Snapchat 1%
3% don't use B2C social media platforms

Most used B2B Social media platform



64% LinkedIn
(65% in 2021)



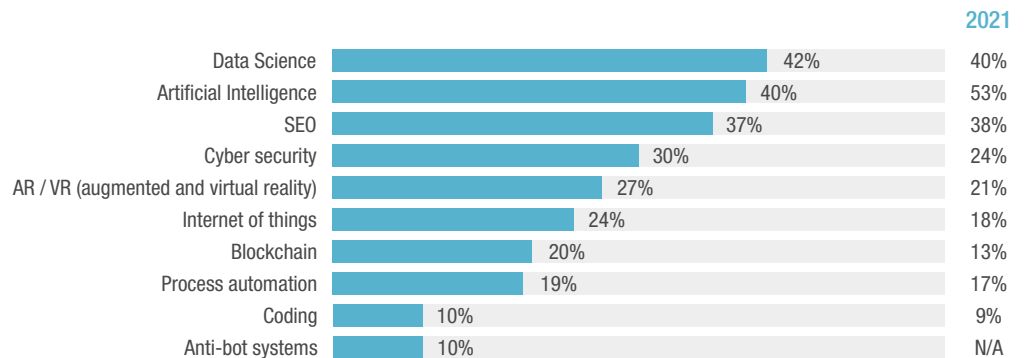
11% Instagram
(4% in 2021)



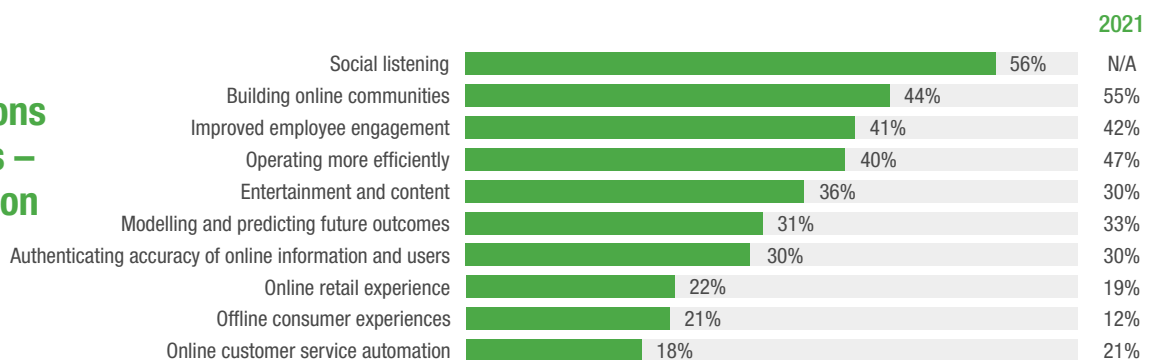
9% Twitter
(12% in 2021)

Facebook 6% | Youtube 3% | TikTok 1% | Snapchat 1%
1% don't use B2B social media platforms

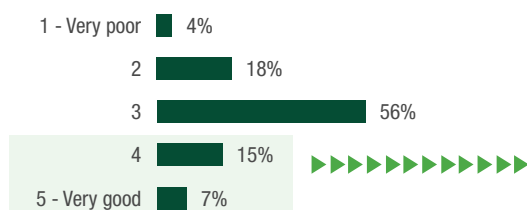
Most relevant technologies - future prediction



Important tech applications for businesses – future prediction



Rating of adoption of new technology by region



North America
45%

Latin America
24%

Asia Pacific
17%

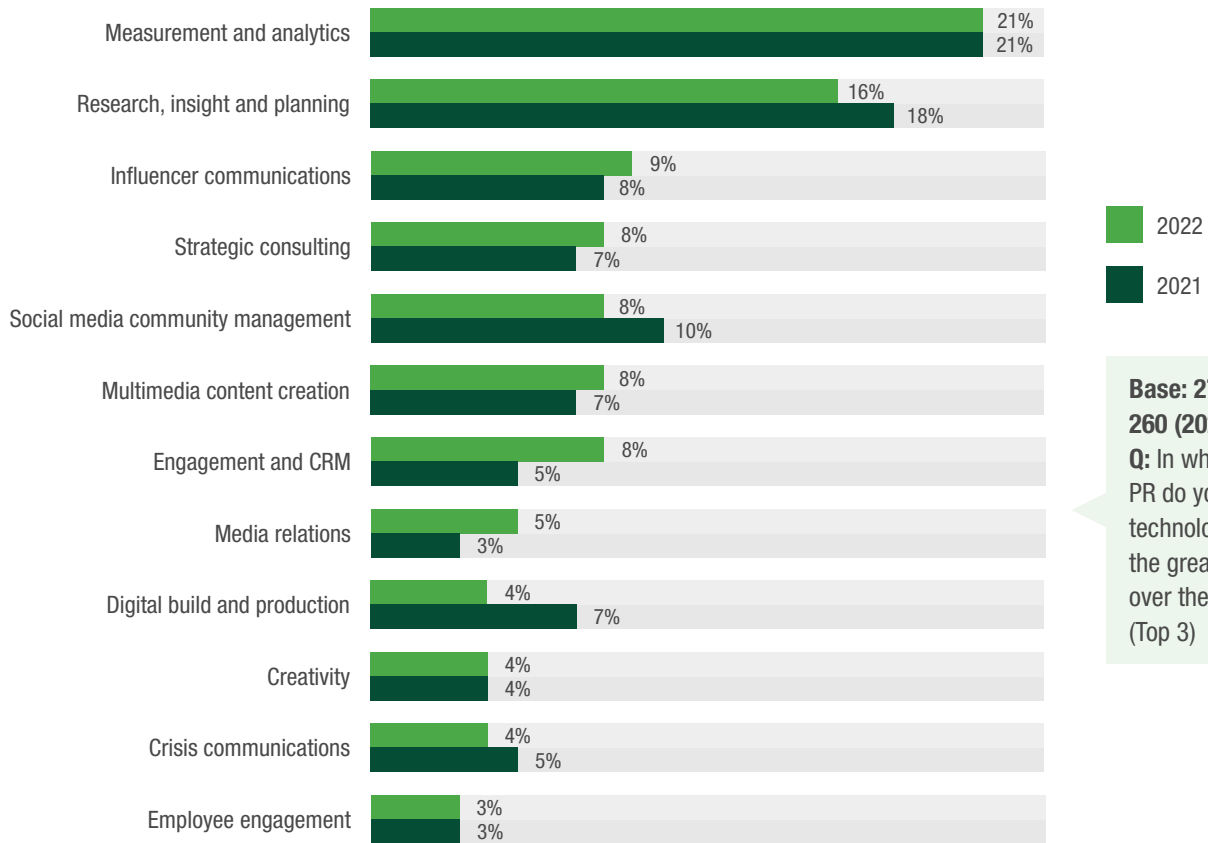
Europe
18%

United Kingdom
21%

Africa
19%

Middle East
14%

Areas most impacted by technology



Base: 271 (2022) / 260 (2021)
Q: In which areas in PR do you envisage technology having the greatest impact over the next 5 years? (Top 3)



Coming hot on the heels of two years of Covid related business disruption, 2022 has not been the year for which we had hoped. Just as things began to look more promising and organisations were emerging with increasing confidence, the world has once again been rocked. War in Ukraine, logistics / supply chain issues and labour shortages have led to a resulting cost of living crisis, spiralling inflation and economic uncertainty. As I type, there is no respite in sight and organisations around the world are buttoning down the hatches and preparing for a looming recession and very challenging 2023.

The human costs on our colleagues have been stark and are clearly called out in this report's section on mental health. As an industry we are becoming better at offering the right support to these human challenges. But are we getting better at looking after the health of our agencies? It would appear not.

Right now, all around the world, finance directors are reviewing budgets and financial plans. In this unprecedented era of uncertainty, discretionary spending is being done away with. Any activity that doesn't drive organisational value is seen as a luxury, not a necessity. Any marketing discipline that conducts activity without demonstrating the organisational value of that work is being seen for what it is – a waste of time and money. And the people and agencies providing it as busy fools not value creators.

According to this report, what do organisations require from their PR agencies?

Well, the research shows that the top three client objectives are improving corporate reputation, increasing sales and building brand purpose. Yet when we come to look at the metrics that agencies are providing, none of the top five speak to these simple business objectives. Engagement metrics, media clips, AVEs, sentiment analysis and media summaries do not demonstrate how comms supports and drives reputation, increases sales or builds brand purpose. They are all metrics that point to activity, not effectiveness. It's only when we get to the lowly sixth and below positions that we see any attempt to link outputs to outcomes – with web traffic, awareness, business results, advocacy and sales all listed.

This is a wake up call. It is time to lean in and take action. For comms to remain relevant it has to start demonstrating how its work supports organisational objectives. It has to go beyond the 'counts and amounts' of activity driven metrics and point to the value it creates.

It may appear hard, but lots of help is at hand. ICCO's strategic partner AMEC has been driving global best practice in measurement of comms and provides a multitude of free tools and resources to help the industry. They are all available on AMEC's website in multiple languages. I urge you to join the 43% of the global PR agency industry that do use these meaningful measurement techniques. Help is at hand from international AMEC members, not least ICCO's global and exclusive partner CARMA, where I am proud to work.



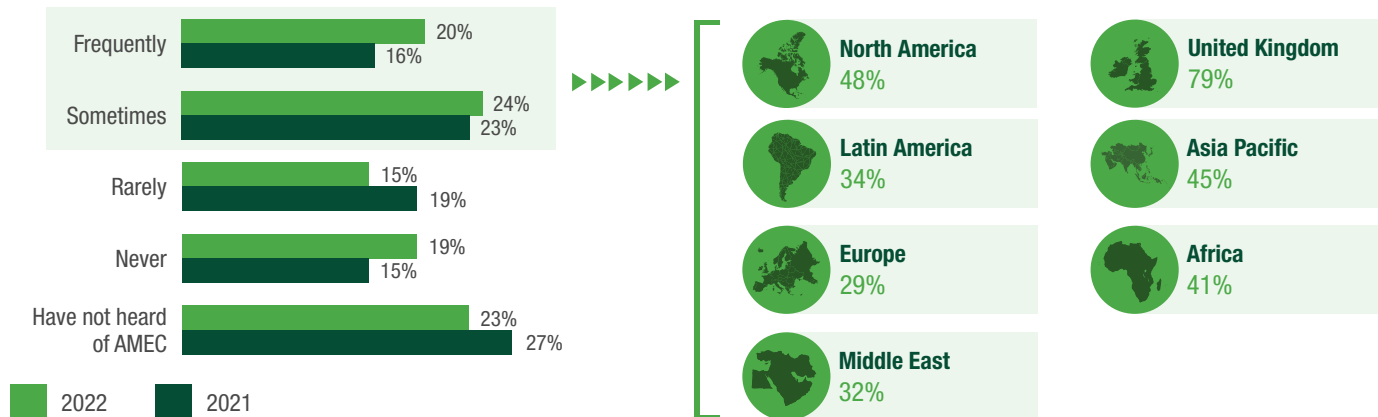
Richard Bagnall

CO-MANAGING PARTNER
CARMA

“For comms to remain relevant it has to start demonstrating how its work supports organisational objectives”

MEASUREMENT AND EVALUATION

Use of AMEC by region



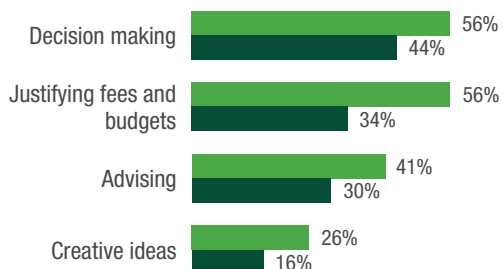
Uses for measurement and evaluation



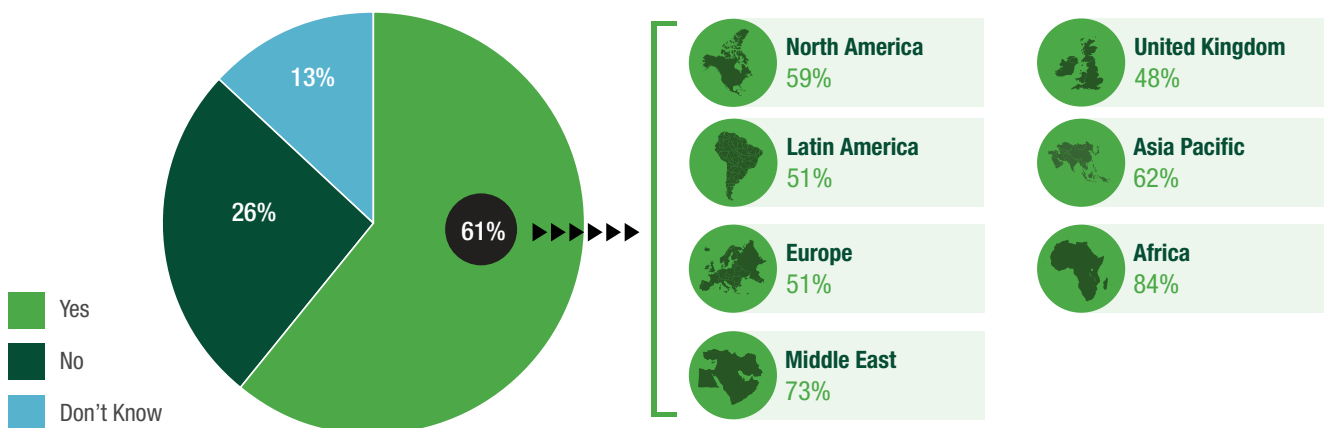
Reporting
78% (72% in 2021)



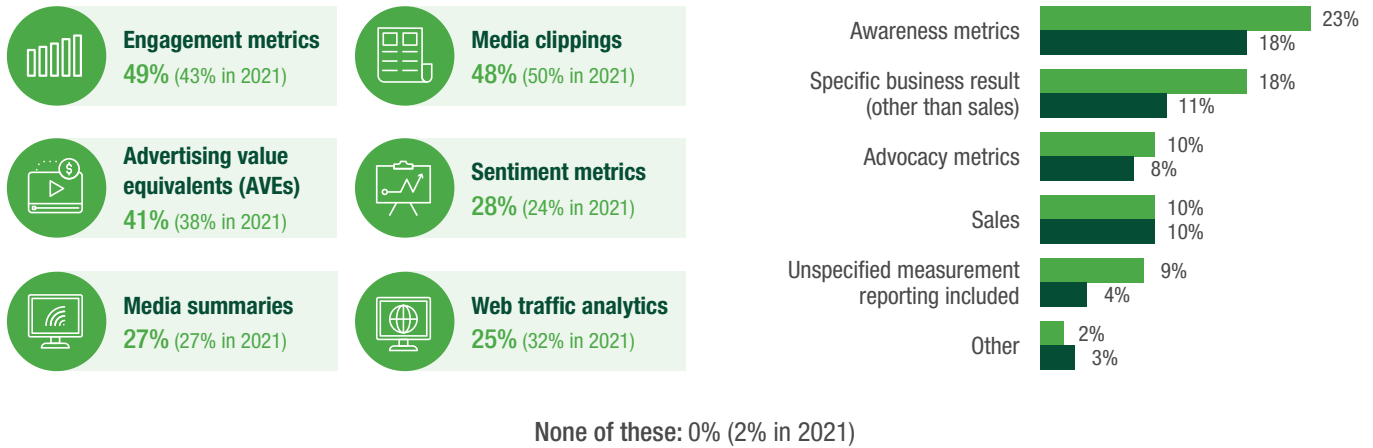
Planning
57% (41% in 2021)



Use of AVE by region



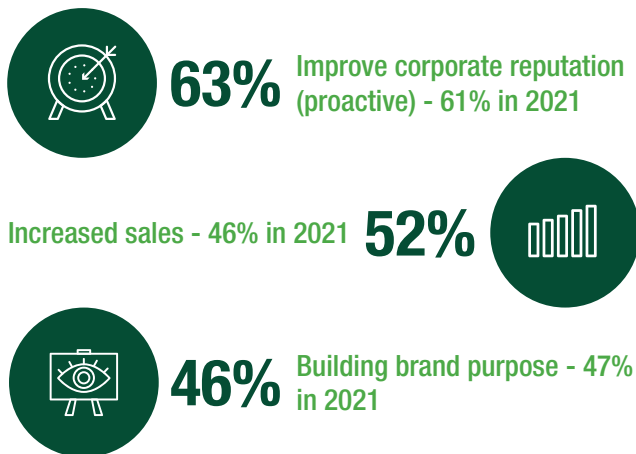
Most likely client requests



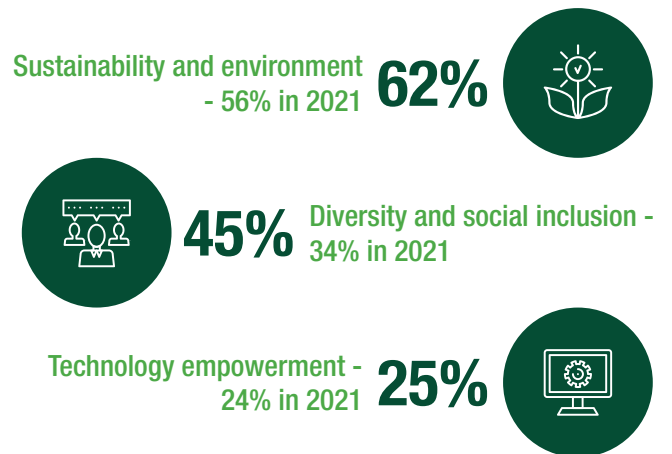
Base: 271 (2022) / 260 (2021)

Q: Which of the following measurement metrics are your clients most likely to request? (Top 3)

Most important objectives to clients' public relations goals



Purpose and social issues clients are most likely to address



GLOBAL WOMEN IN PR ANNUAL INDEX SURVEY HIGHLIGHTS



Angela Oakes

CO-FOUNDER & JOINT PRESIDENT,
GLOBAL WOMEN IN PR



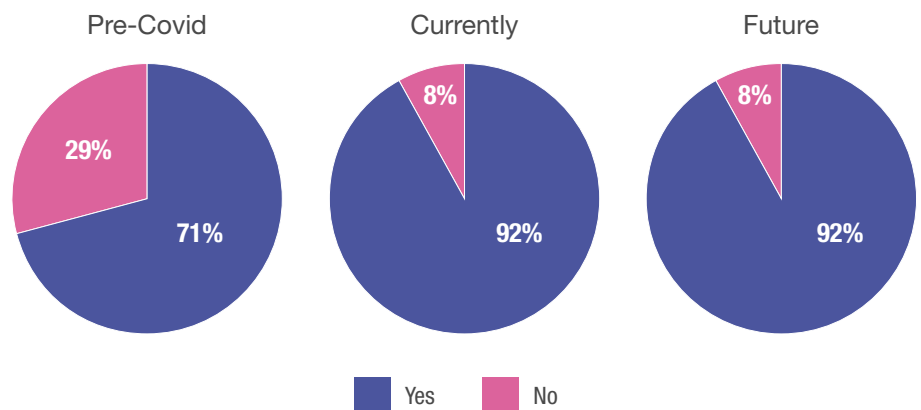
The GWPR Annual Index is a survey-based report measuring the position of women working in the global PR industry. This year is the fourth edition of the Annual Index, which allows us to track changes and understand the issues affecting women in PR. In an industry that is two-thirds female we still have a long way to go to achieve gender equality, but by shining a light on some of the issues we can begin to make the changes necessary that will benefit both business and the next generation of PR women.

So what have we discovered from this year's survey? Has there been much change post-pandemic?

Flexible working on the rise with wide-ranging benefits

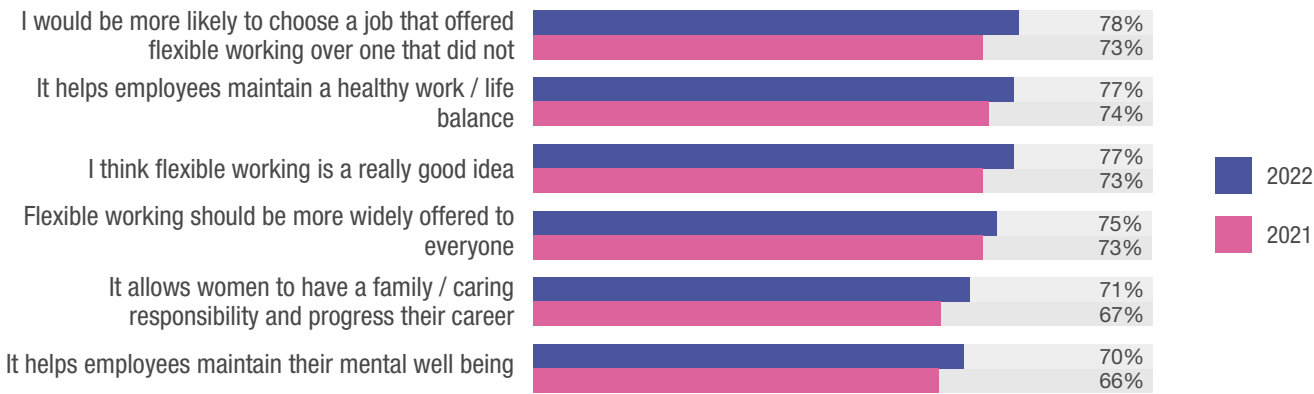
Unsurprisingly, the most significant change we have noted in the workplace relates to flexible working and in particular remote working.

Flexible working practices have increased since the pandemic and are anticipated to remain in the future.



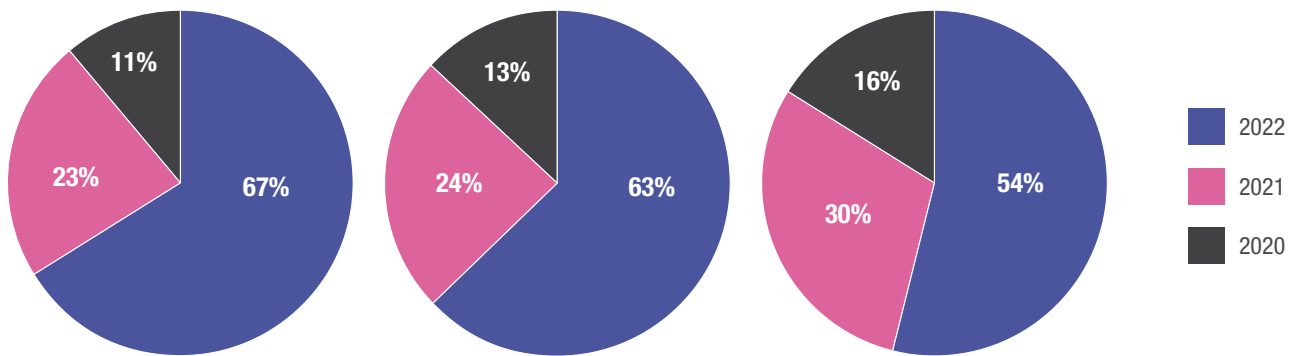
92% of PR women are working flexibly and they anticipate this will not change in the future.

The positive benefits of flexible working are widely acknowledged by PR women, in terms of better work-life balance, juggling caring responsibilities, improved mental wellbeing and progression into leadership positions



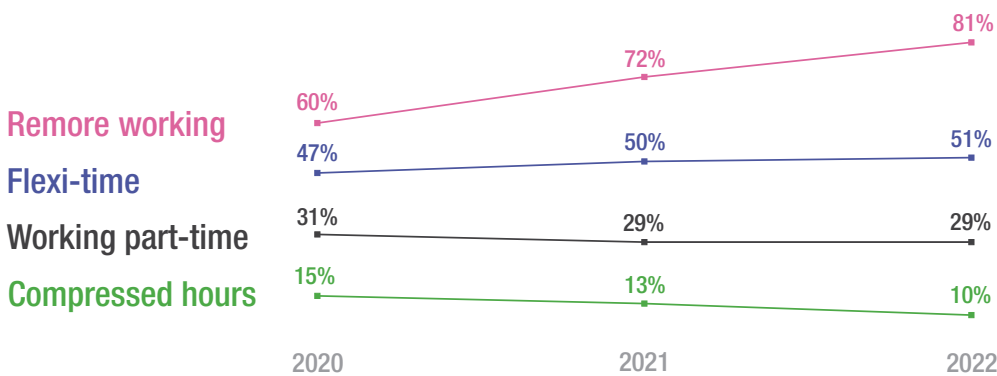
Company perceptions of flexible working

Flexible working is being increasingly perceived as positive by companies



Employers are becoming more positive about flexible working than they were pre-Covid. Two-thirds now have positive views compared with 54% two years ago

Remote working is the type of flexible working that has seen a massive increase, up 35% since 2020. Currently 81% of PR women work remotely.



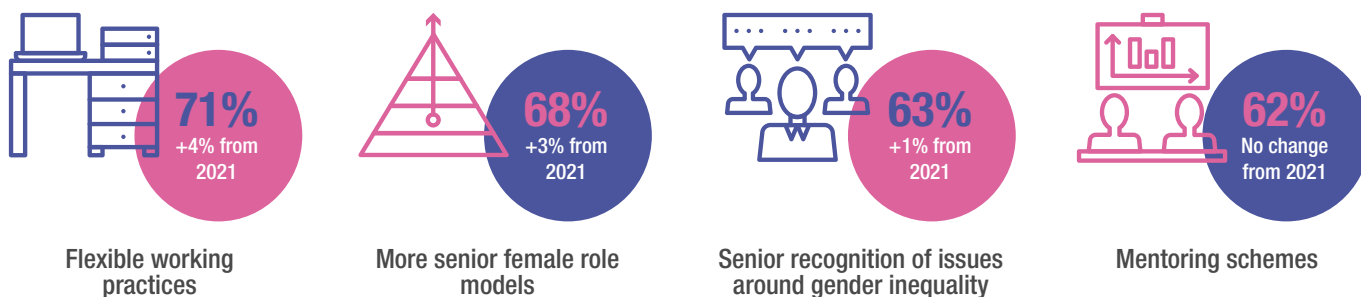
And over half (56%) of PR women expect to be working remotely 2-3 days a week during the next year.

GLOBAL WOMEN IN PR

In an industry that is two-thirds female the boardroom does not reflect this split – though the situation for PR women in agencies is better than for those working in-house.

So what initiatives can best help women progress into leadership positions?

Flexible working and female role models are increasing in importance to help women get into the boardroom



Once again the benefit of flexible working for PR women is highlighted.

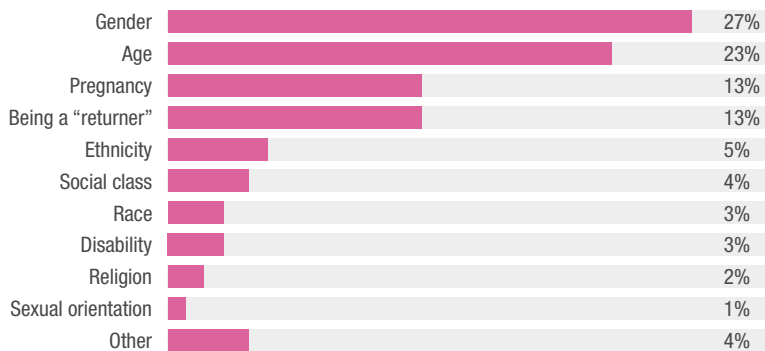
Discrimination in the workplace

Also for this year's Annual Index we decided to take a look at discrimination in the workplace. Worryingly we discovered that over half of PR women say they have experienced some kind of discrimination.

Gender discrimination was the top of the list, but surprisingly the second most common form of discrimination was ageism.

Over half have experienced discrimination in the workplace - mainly because of gender or age

Discrimination faced in the workplace:

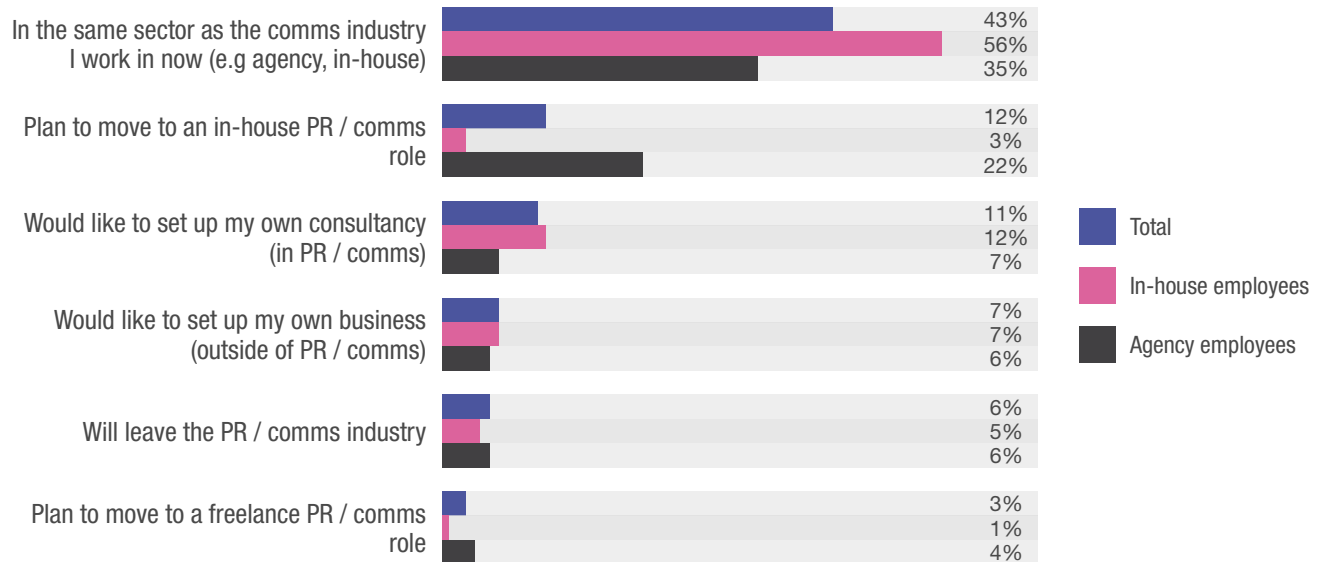


53% say they have experienced discrimination at work
Rising to 58% among those working in the Americas (USA / Mexico / Canada)

The issue of ageism in PR is a very real one and important to acknowledge in an industry where talent retention is a big challenge. The situation is much worse for those working in agency, rather than in-house. Only 35% of PR agency women think they will still be working in an agency when they reach 50 years of age.

Majority of agency PR's don't see themselves staying in agency beyond 50 years of age, in contrast to in-house PR's

Where do you see yourself working at 50+?



The Covid-19 pandemic has undoubtedly changed the way we work. Flexible and remote working are here to stay and employers are increasingly recognising the benefits of hybrid working. This can only benefit PR women in the long-term and help to level up the playing field.

At GWPR this year we have successfully launched EMPOWER - the first ever international leadership and mentoring programme for PR women. Another initiative to encourage and support the next generation of PR women.

The GWPR Annual Index 2022 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 business areas do you expect an increase in PR firms' investment this year?

1. Influencers communications
2. ESG
3. Strategic consulting



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

1. IT and technology
2. Financial and professional services
3. Healthcare



Which of the following measurement metrics are your clients most likely to request?

1. Advertising value equivalents (AVEs)
2. Engagement metrics
3. Media clippings



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. Finding quality, good value recruitment consultants / Hiring senior staff



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

1. Purpose and ESG
2. Strategic consulting
3. Measurement, evaluation and analytics



Which of the following issues do you believe pose the greatest challenges for the PR firms in your market in the next 12 months?

1. Economic conditions generally / Clients unwilling to commit sufficient funds
2. Staff recruitment
3. Staff retention



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

1. Sustainability and environment
2. Education
3. Diversity and social inclusion



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

1. Social listening
2. Building online communities
3. Operating more efficiently

TOP 3 MOST COMMONLY SELECTED ANSWERS



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

1. ESG
2. Influencers communications
3. Strategic consulting



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

1. IT and technology
2. Healthcare
3. Financial and professional services



Which of the following measurement metrics are your clients most likely to request?

1. Engagement metrics / Media clippings
2. Advertising value equivalents (AVEs)
3. Media summaries



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

1. Retaining key talent
2. Motivating younger executives
3. Developing junior and 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. Purpose and ESG / Research, Insight and planning



Which of the following issues do you believe pose the greatest challenges for the PR firms in your market in the next 12 months?

1. Economic conditions generally / Staff retention
2. Clients unwilling to commit sufficient funds / Staff recruitment
3. Inability to effectively measure impact of PR / Digital and new technologies



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

1. Sustainability and environment
2. Diversity and social inclusion
3. Economic inequality and poverty



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

1. Social listening
2. Building online communities / Improved employee engagement / Operating more efficiently
3. Modelling and predicting future outcomes

TOP 3 MOST COMMONLY SELECTED ANSWERS



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

1. ESG
2. Strategic consulting
3. Influencers communications



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

1. Healthcare
2. IT and technology
3. Financial and professional services



Which of the following measurement metrics are your clients most likely to request?

1. Media clippings
2. Web traffic analytics
3. Advertising value equivalents (AVEs)



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

1. Retaining key talent
2. Motivating younger executives / Hiring mid-level staff
3. Developing junior and mid-level staff / Finding quality, good value recruitment consultants



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

1. Strategic consulting
2. Purpose and ESG
3. Crisis counsel



Which of the following issues do you believe pose the greatest challenges for the PR firms in your market in the next 12 months?

1. Clients unwilling to commit sufficient funds
2. Staff recruitment
3. Staff retention



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

1. Sustainability and environment
2. Diversity and social inclusion
3. Education / Data privacy and consumer rights



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

1. Improved employee engagement
2. Social listening
3. Operating more efficiently

TOP 3 MOST COMMONLY SELECTED ANSWERS



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

1. Influencers communications
2. ESG / Marketing and business development
3. Creativity



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

1. IT and technology
2. Healthcare
3. Financial and professional services / Consumer products



Which of the following measurement metrics are your clients most likely to request?

1. Media clippings
2. Engagement metrics
3. Advertising value equivalents (AVEs)



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

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



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

1. Creativity
2. Strategic consulting
3. Crisis counsel



Which of the following issues do you believe pose the greatest challenges for the PR firms in your market in the next 12 months?

1. Economic conditions generally
2. Clients unwilling to commit sufficient funds
3. Digital and new technologies



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

1. Sustainability and environment / Diversity and social inclusion
2. Technology empowerment
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. Social listening / Building online communities
2. Entertainment and content
3. Improved employee engagement / Authenticating accuracy of online information and users

TOP 3 MOST COMMONLY SELECTED ANSWERS



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

1. ESG
2. Influencers communications / Strategic consulting
3. Creativity



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

1. Healthcare
2. IT and technology
3. Financial and professional services



Which of the following measurement metrics are your clients most likely to request?

1. Media clippings
2. Engagement metrics
3. Advertising value equivalents (AVEs)



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. Developing junior and mid-level staff



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

1. Purpose and ESG
2. Crisis counsel
3. Strategic consulting



Which of the following issues do you believe pose the greatest challenges for the PR firms in your market in the next 12 months?

1. Staff retention
2. Staff recruitment
3. Inability to effectively measure impact of PR



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

1. Sustainability and environment
2. Diversity and social inclusion
3. Technology empowerment



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

1. Social listening
2. Improved employee engagement
3. Operating more efficiently

TOP 3 MOST COMMONLY SELECTED ANSWERS



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

1. ESG / Influencers communications
2. Measurement and Analytics
3. Strategic consulting / Creativity / Multimedia content creation



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

1. IT and technology / Healthcare
2. Consumer products
3. Food and beverage



Which of the following measurement metrics are your clients most likely to request?

1. Engagement metrics
2. Awareness metrics
3. Media clippings / Sentiment metrics / Media summaries / Advocacy metrics



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. Developing junior and mid-level staff / Hiring senior staff



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

1. Strategic consulting
2. Purpose and ESG
3. Crisis counsel / Creativity / Influencer communications



Which of the following issues do you believe pose the greatest challenges for the PR firms in your market in the next 12 months?

1. Staff retention
2. Economic conditions generally
3. Competition from management consultancies and other professional service firms



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


1. Diversity and social inclusion
2. Sustainability and environment
3. Technology empowerment



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


1. Social listening
2. Building online communities
3. Improved employee engagement

TOP 3 MOST COMMONLY SELECTED ANSWERS




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

1. ESG
2. Measurement and Analytics / Research, insight and planning
3. Multimedia content creation / Media relations




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

1. Healthcare / Financial and professional services
2. IT and technology
3. Industrial/manufacturing




Which of the following measurement metrics are your clients most likely to request?

1. Engagement metrics
2. Advertising value equivalents (AVEs)
3. Media clippings / Specific business result (other than sales)




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. Hiring mid-level staff




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

1. Strategic consulting
2. Purpose and ESG
3. Measurement, evaluation and analytics / Research, Insight and planning




Which of the following issues do you believe pose the greatest challenges for the PR firms in your market in the next 12 months?

1. Clients unwilling to commit sufficient funds
2. Economic conditions generally / Staff recruitment
3. Financial pressure to meet profit/margin targets



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

1. Sustainability and environment
2. Diversity and social inclusion
3. Economic inequality and poverty / Data privacy and consumer rights



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

1. Operating more efficiently
2. Social listening
3. Building online communities

ICCO REPORT HIGHLIGHTS HOPE IN THE FUTURE OF THE PR INDUSTRY IN AFRICA

As the African continent recovers from effects of Covid-19 and the economic decline resulting from the pandemic, the 2022 ICCO World PR Report has highlighted some needed hope and confidence in the Public Relations industry, especially in the African markets.

Optimism abounds across the continent for the future growth of the market. More agencies believe than not believe that profitability will increase as 7.2 of 10 African respondents stated that they were optimistic about the growth of the public relations market.

Opportunity exists in multiple areas with the top three being clients looking for support with purpose and ESG initiatives (51%), strategic consulting (31%) and measurement, evaluation and analysis (35%). The industry foresees significant growth in clients from the tech (65%), healthcare (43%) and financial sectors (57%).

Challenges

Alongside economic conditions (46%), staff recruitment (32%) and retention (30%) are key challenges PR firms across the continent anticipate facing over the next 12 months. Much like in 2021, rival agencies and graduate programmes are considered the main sources of new talent. For the next decade, the industry will treasure skills like strategic consulting; purpose and ESG; and crisis counsel, but the biggest challenge remains talent retention.

Client Needs and Measurement

Clients' business objectives are improving corporate reputation, increasing sales and building brand purpose, while on the social causes side sustainability and diversity are highlighted. To measure PR success, a worrying 59% of clients still request advertising value equivalents (AVEs) despite all the education that has been done in the industry by the likes of AMEC, the PRCA, PRISA and ICCO to eradicate its use. This has resulted in a shocking 84% of African PR practitioners still using AVE. Additionally, 57% of clients request engagement metrics while 46% use media clippings.

Media and Tech

LinkedIn is still the most popular platform for B2B communication, and Instagram is still the most common for B2C. Respondents are convinced that techniques like SEO (46%), Data Science / Artificial Intelligence (43%), AR/VR (augmented and virtual reality) (32%) will be very important in the future.

Ethics in PR

In contrast to the global market where more agencies (90%) have signed a code of conduct and turned down clients for ethical reasons, only 27% of respondents from the African market have signed up to an industry code of conduct. While this is the case, 95% of



Bridget Von Holdt

CO-MARKET LEADER & MD
BCW AFRICA

African PR practitioners agree that it is the role of PR agencies to advise clients against behaviour that the agency deems unethical.

Mental Health

Worryingly, 43% of respondents have experienced mental health problems in the past. Despite this, over half (54%) do not have any formal mental health and wellbeing support available in their organisation.

Overall, there is clearly plenty of opportunity across the vast continent of Africa but as with the industry globally, attracting the next generation of talent and retaining them is something we still must overcome before these opportunities can truly be realised.

STILL FIGHTING... AND WINNING



Nitin Mantri

PAST 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 postpandemic 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.

Growth Map

APAC region agency heads predict that the biggest areas of growth in the region for the next five years would be IT and technology (72%), healthcare (48%) and financial and professional services (45%).

In terms of PR firms' investment this year, investment in ESG and influencer communication is expected to rise further, while social media security management is taking a considerable tumble from the 2021 data. In fact, ESG appears in the top two areas of investment in every region studied, including APAC.

Overall, PR agencies are taking an optimistic approach to the future in their respective regions. A good sign because optimism, I believe, lays the groundwork for success.

BY SHIFTING FROM “WHY” TO “WHO” PR GETS COMFORTABLE BEING UNCOMFORTABLE

Since 2020, the PR sector has learnt to live with uncertainties those firstly brought by the pandemic and then by factors such as hyperinflation, political instability, and the war in Ukraine with subsequent humanitarian and energy crisis. Despite this scenario and the fears of a big recession on the way, in 2022 public relations and communications consulting business has been solid and growing from high single digit to double digit in many European markets, with ESG comms (47%) and Strategic Consulting (39%) ranking in most comms leaders' top 3 growth areas.

One reason for this is the evolution of the expected role PR should play in such a tragic and uncomfortable situations: we are often called in to help companies, brands, institutions, and NGOs communicate “who” they are to key internal and external stakeholders. The shift in expectation is for PR to find the answers not for “why does this company exist?” but instead a “who is this company” which implies an indissoluble link among commitments, concrete actions and communications.

In this sense, the relationship between c-suite and communicators has never been so tight opening up opportunities especially in Healthcare (55%), Technology (49%) and Financial Services (35%). The “who” journey also implies a clear definition of corporate culture, a delicate and

highly valuable aspect that now lives in hybrid formats presenting threats/opportunities and in which our consultancy plays a crucial role.

In recent years, the research of the “who” has also occurred for ICCO in Europe. Thanks to our members and working groups we succeeded in bringing to life concrete initiatives defining our Organization such as the campaign created with EMA (European Medicines Agency) about responsible communications on Covid-19 vaccines, the new CMS certification (Consultancy Management Standard) allowing our member agencies improving their governance up to the Ukraine Communications Support Network (UCSN) in support of Ukrainian colleagues.

Not only that, in March 2022 we published the first ‘Modern Communication Challenges for Society’ white paper, work done in partnership with Council of Europe setting out the PR industry’s role in improving the global media and communications landscape. The white paper identifies freedom of media and freedom of speech, media literacy and education, and AI and digital media ethics, as the three issues most crucial for the PR industry to have a leading voice on.

To tackle these challenges, the paper calls for an alliance across industries, including journalism, fact-checking, advertising, tech, and policymakers to discuss legislative and educational solutions.



Massimo Moriconi

GM & CEO OMNICO PR GROUP
ITALY
ICCO EUROPE PRESIDENT

Months after the launch, ICCO is already collecting international and national initiatives in response to any of the above mentioned three challenges and is ready to support members willing to start new ones.

We want to be a constructive force enabling the collective design of a better information society where ethics, international high standards and quality of our work are our biggest assets allowing us to feel comfortable being uncomfortable. Today and tomorrow, despite everything.

IT'S TIME TO PRIORITISE



Ahmad Itani

CHAIRMAN OF PRCA MENA
PRESIDENT OF ICCO MIDDLE EAST
FOUNDER AND CEO OF CICERO
& BERNAY COMMUNICATION
CONSULTANCY

The World PR Report, the definitive study of the global public relations industry, conducted annually by the International Communications Consultancy Organisation (ICCO), is a fundamental look at the state of global PR practices and the trends and initiatives affecting and influencing its progress.

When it comes to insights from the Middle East, the GCC seems to continuously take the lead, with Dubai and Riyadh at the forefront. Whether born and raised in the GCC or recently relocated here, there's a desire for people the world over to experience the pace and manner through which such cities develop.

The ICCO World PR Survey serves as a mirror for our industry to assess how counterparts around the world feel about areas that impact us. Year after year, we witness perspectives that suggest improvement in attitudes or take-up of key elements, whether technological in nature or addressing corporate responsibility.

We analyse these with an appreciation of the numerous factors steering differing results and recognise that our entire region doesn't have the historical framework of Europe and North America but has been on an enviably fast-paced catch-up for decades.

This year, the issue of attracting the right people is proving to be a topic for discussion, and we see this reflected in the survey's talent questions.

Marketing agencies in the UAE feel that staff retention and recruitment are what firms in the next 12 months are keenest to focus on, especially considering the welcome policy and visa changes the government continue to introduce. Across the board, the industry worldwide believes that retention is the most difficult element of their talent strategy; however, one foresees that at some point, there will be a shift regionally and that national developments geared at addressing these problems produce desired results. The UAE has introduced several measures to improve employee happiness.

Companies themselves have adapted to a more convenient shorter working week, which has been a morale booster.

The ME and Africa both believe, more so than others surveyed, that their staff demographics reflect that of the country. Diversity implementation is at an impressive level; even anecdotally, we see that both the demographic spread of the talent pool and the office makeup align with the ethnic personality of the UAE.

Almost half of those surveyed claimed to have experienced mental health issues in the previous 12 months. 43% said that their organisations had measures in place to support such occurrences, a number that grants the industry scope to push on for better provision.

Ultimately what this report offers is a chance to reflect on the ways in which we can be better. There are plenty of areas we are the best in the world, with support provided for staff being something we could certainly continue our good work toward. Additionally, an improved understanding of the talent in our offices boosts morale, increases productivity and generates greater optimism about the years ahead for the PR and marketing industry. The future will always be bright.

OUR TALENT COMMITMENTS IN TIME OF CHANGE

This year's report spotlights a seismic shift happening across industries. In a post-pandemic culture, corporations are faced with pressure to examine their values and address lackluster recruitment efforts in hiring diverse talent. Public relations agencies and communications consultancies are no exception. The complexities of structural discrimination in American society have helped design talent pools that obstruct access for underrepresented people and groups. As for those that make it through, the issue of retention remains.

Key talent ranging from junior associates to C-Suite leaders are steadily falling through the cracks or being overlooked altogether until it's much too late. It's no secret that team turnover makes business objectives incredibly difficult to achieve and as a leader, the tension is present every day.

As an agency CEO, I've had to humbly lift a magnifying glass to look at where organizational holes in our internal culture and hiring lie and empower my teams to get behind what we can control.

To authentically engage, leadership must begin by educating themselves to recognize how biases, intentional and unintentional, fuel turnover and dispassion among employees. Secondly, effective listening has to be valued. Think internal channels where employee concerns and ideas around career development can be raised and followed up with clear and transparent actions. These are just a few ways agencies can lay a critical foundation to craft a diversity, equity, inclusion and belonging strategy and long-term commitments to make sizeable changes throughout their business.

The rate of change in our business is not slowing down and there is no business blueprint for the year ahead. In riding the waves of economic shifts, we can expect to experience growth challenges that impact us all. However, there is still an underlying need to attract and develop talent in communications and marketing, particularly in supporting the tech industry. Attracting diverse and ambitious talent showcases agencies' capabilities to be strategic partners to meet client needs of tomorrow.

Ultimately as consultants, our clients look to us as experienced guides and want to see our businesses reflect the counsel we provide them. By using this time to build an internal workforce that champions diverse and inclusive career expansion we can be the business leaders our team and clients need to do the same.



Heather Kernahan

CEO, HOTWIRE
ICCO VICE-PRESIDENT

“Attracting diverse and ambitious talent showcases agencies’ capabilities to be strategic partners to meet client needs of tomorrow”

DESPITE UPS AND DOWNS IN LATIN AMERICA, OPTIMISM PREVAILS



Ciro Dias Reis

OWNER, IMAGEM CORPORATIVA &
ICCO BOARD MEMBER

Latin American PR market is still recovering from the social and economic impacts of Covid-19, which have severely punished the region. Latin America had 1.7 million deaths from the pandemic until October 2022, almost 25% of the world total, despite the region having 586 million inhabitants, that is, only 7.5% of the planet's population.

This recovery of Latin American economies, after a prolonged period of pandemic, was greatly benefited by stimuli from different governments that, each in their own way, injected a lot of resources into their markets: on the one hand, support for low-income/poor populations; on the other hand, financial credits for companies, especially small/midsize business. This boosted demand that had been repressed, with Latin American populations responding to these stimuli, and several companies having at least basic financial conditions to get through the worst moments of the pandemic.

Latin America's GDP is expected to grow by 3.2% in 2022. This trend has already translated into greater demand for PR activities in the region, based on some specific pillars such as: digital services; internal communication and engagement projects (result of new work formats among clients in general); ESG and purpose projects; crisis management.

As in so many other countries in the world, inflation is a cause for concern in the region. In the 6 largest economies in Latin America, prices rose (comparison between July 2021 and July 2022): 71% in Argentina; 13.1% in Chile; 10.2% in Colombia; 10% in Brazil; 8.1% in Mexico; 5.6% in Peru. In addition to salary pressure (hiring and recruiting talents has been a challenge for PR agencies across the region), inflation also limits client budgets and makes it more difficult to negotiate fees.

The combination of all the above factors, however, has led to a degree of optimism on the part of PR agencies in the region. Part of this scenario is the result of adapting to market dynamics, which requires agencies to be increasingly agile in delivering integrated products and services, often acting as one-stop-shops (going from traditional PR to more sophisticated solutions such as analytics and BI).

Another traditional variable that impacts economic activities in Latin America and, consequently, PR business in the region is related to politics. In years of general elections, traditional polarizations slow down investment decisions and other economic movements, thus influencing the PR market. In 2021, general elections took place in Colombia, Chile and Peru. 2022 the same happens in Brazil. In 2023, it's election time in Argentina.

SIGNS OF RESILIENCE

While the UK market outlook for the next year might feel uncertain, the results of the 2022-23 report demonstrate the true resilience and confidence of the PR sector.

Unquestionably, the UK market has shown signs of strain and pain from political and economic uncertainty over the last year. Yet, survey respondents remain optimistic about the industry's growth. The average score in confidence of corporate CEOs taking corporate reputation seriously, paying more attention to corporate purpose, and increasing agency profitability have all grown across the board.

The World Report results can act as a valuable indicator and reminder of our confidence in the outlook for the year ahead. With our growth and recognition of the value our services provided, there's a bright, positive light to guide us forward.

UK becoming the industry standard bearer

The World Report shows just how much the UK has to be proud of. Collectively, the market leads the charge on our commitment to using AMC tools and principles for evaluation and measurement (79%). The UK also spearheads signing up to the industry code of conduct in ethics (86%) and proves it values its moral compass, with 90% of the market having turned down a job for ethical reasons.

On the back of an upswell of change, we've put diversity and

inclusion policies (98%) at the heart of our business plans. Holding ourselves to account, we've appointed a dedicated person responsible for equity and inclusion in almost all our businesses (98%). There's still a long journey ahead as only 12% of the market believes the people working in our industry reflect the ethnic demographics of their country. This will take collective efforts to tackle at every level.

Beyond the pandemic – tackling the challenge of poor mental health

PR professionals have always faced a combination of constricted time, budget and resources, putting our industry under pressure to achieve more with less. The scale of that pressure has pushed mental health to a business-critical issue for the industry over the last two years. Yet disappointingly across the UK, 69% of surveyed participants reported having experienced a mental health problem in the last 12 months.

As an industry, we need to ask ourselves why and how we've failed to look after our mental health. While there may not be obvious quick wins, we might be able to find course-correcting concepts from our continental partners across Europe who report a substantially lower rate of mental health problems in the last year (22%). Asking those tough questions is part of our duty to our industry and to the incredible professionals working within it.



Christopher Onderstall

HEAD OF TRANSFORMATION
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