

# ICCO WORLD PR REPORT 2024-2025

#worldprreport

AGENCY VIEWS OF THE PATH AHEAD

PRovoke  
Media



# 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 30+ members, representing PR and communications agencies across all continents, ICCO members strive to shape the future of communications by improving professional standards and tackling collective issues collaboratively.

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**ICCO**

INTERNATIONAL  
COMMUNICATIONS  
CONSULTANCY  
ORGANISATION



## ADVOCACY AND LOBBYING

## STRATEGIC AND PROFESSIONAL PARTNERSHIPS



## AWARD WINNING CAMPAIGNS

## AGENCY FINDER AND PARTNER DEVELOPMENT



## CONSULTANCY MANAGEMENT STANDARDS (ICCO CMS)

## MEMBERSHIP SERVICES



# CONTENTS

<b>Executive summaries .....</b>	<b>4</b>
<b>Global results .....</b>	<b>9</b>
<b>Growth and opportunity .....</b>	<b>10</b>
<b>Talent and challenges .....</b>	<b>15</b>
<b>Diversity and inclusion .....</b>	<b>17</b>
<b>Mental wellbeing in the workplace .....</b>	<b>19</b>
<b>Digital trends .....</b>	<b>20</b>
<b>Measurement and evaluation .....</b>	<b>22</b>
<b>Client requests .....</b>	<b>24</b>
<b>Ethics in the industry .....</b>	<b>25</b>
<b>Regional results .....</b>	<b>29</b>

## A DEFINING YEAR FOR PR: NAVIGATING GEOPOLITICAL SHIFTS, AI, AND ETHICAL LEADERSHIP



**Grzegorz Szczepański**

**ICCO PRESIDENT  
CEO BURSON POLAND**

The ICCO World PR Report 2024-2025 captures the public relations industry at a pivotal crossroads. While economic uncertainty and financial pressures persist, a more profound challenge is emerging: navigating the seismic geopolitical shifts that threaten to reshape the global order. In a world where political discourse increasingly influences business communication and where misinformation spreads alarmingly fast, the need for ethical leadership has never been greater. Against this backdrop, PR leaders worldwide continue to adapt, innovate, and invest in the future. This year's findings highlight the growing role of AI, the increasing value of strategic consulting, and the urgent call for ethical leadership in an era defined by both technological advancement and ideological polarization.

### Navigating Economic Pressures with Optimism

Despite global instability, most PR leaders (67%) remain optimistic about market growth, and 61% expect increased profitability this year. However, budget constraints and economic concerns persist, requiring agencies to demonstrate tangible value and strategic impact to clients.

Corporate reputation and strategic consulting continue to be key growth areas, while public affairs has risen notably, reflecting the increasing need for expert guidance in a shifting political and regulatory landscape. This trend underscores the essential role PR professionals play in helping organizations navigate not just market forces, but also the complexities of a fractured geopolitical environment.

### AI: Transforming PR at Unprecedented Speed

This year marks a turning point in how PR agencies adopt and integrate AI. With 74% of professionals already using AI tools and 47% identifying AI mastery as the most critical skill for the future, it is clear that the industry is embracing automation, data analysis, and content generation.

However, with great innovation comes great responsibility. AI-driven misinformation poses a significant ethical challenge that PR professionals must tackle proactively. The industry's ability to balance efficiency with credibility will define its role in shaping public trust and corporate reputation in the years ahead. As corporate communications increasingly reflect the language and tone of broader political discourse, the potential for misinformation to influence public narratives is more significant than ever. PR leaders must be vigilant, ensuring technological advancements uphold truth and transparency.

# ICCO SUMMARY

## A Global Perspective: Opportunities and Challenges

Each region brings unique insights and priorities:

1. **North America** leads AI adoption but faces ethical challenges and talent retention issues.
2. **Europe** prioritizes corporate reputation, ESG, and AI governance, reinforcing its strong ethical stance.
3. **Asia-Pacific** is highly optimistic, with corporate purpose and technological innovation driving growth.
4. **Latin America** navigates economic challenges but sees opportunities in reputation management and digital PR.
5. **Africa** is a high-growth market, particularly in social media, influencer marketing, and ESG communications.

The global landscape reflects both shared and region-specific challenges, reinforcing the need for tailored strategies that address local realities while maintaining global ethical standards.

## The Future of PR: Leading with Purpose

Beyond technology and economic shifts, the industry urgently needs to attract and retain top talent. Younger professionals are drawn to purpose-driven careers, making diversity, inclusion, and ethical leadership critical for long-term success. Recent corporate retrenchment from DE&I initiatives signals a broader shift in priorities. This makes it even more essential for the PR industry to champion transparency and public interest, resisting the drift toward self-serving, propagandistic narratives.

At ICCO, we are committed to helping PR agencies thrive by providing advocacy, thought leadership, and strategic partnerships. As we look ahead, the challenge is clear: embrace innovation while staying true to the core values of transparency, trust, and ethical communication.

The PR industry has always been about influence, storytelling, and shaping narratives—and in 2025, it has never been more important to lead with integrity.





# PROVOKE SUMMARY

## PURPOSE, TALENT, AND AI: NAVIGATING PR'S SHIFTING LANDSCAPE



**Paul Holmes**

FOUNDER AND EDITOR,  
PROVOKE MEDIA

**As always, the ICCO World PR Report provides plenty of useful real-world data on the growth and outlook of the public relations business, but this year there were a few things that stood out to me.**

The first is that the backlash against what critics call “woke”—a term that has come to mean anything organizations do that is focused on making a positive contribution beyond quarterly profits—is being felt by agencies around the world, and particularly those in the US and UK.

Asked about whether companies are paying more attention to corporate purpose—a trend that has fueled growth in both corporate reputation and consumer marketing work—the average score in North America declined from 7.0 last year to 5.9 this year. In the UK, the score declined from 7.8 to 6.3. Only in the Asia-Pacific region did the score go up.

Equally troubling, when respondents were asked if marketers were spending more money on PR relative to other communications disciplines, North America in particular showed a steep decline: from 6.0 last year to 4.6 this year. It seems likely that some of this decline is related to cutbacks on purpose-driven programming.

But it is also possible that American PR agencies are just feeling gloomy in general, because when respondents were asked whether there was a plentiful supply of talent in their market, the North American score declined significantly, from 7.2 to 5.7. Again, there was more optimism evident in APAC, where the score went from 5.3 to 6.0.

It is difficult to imagine what has changed in North America over the past 12 months that might have impacted the actual supply of talent to this extent—which presumably means that the change in score here relates primarily to what we have learned over the past 12 months to call “vibes.”

There is, thankfully, better news when it comes to areas of growth: once again, firms were most likely to identify corporate reputation and strategic consulting as the most significant source of growth last year and the areas where growth is expected in the year ahead—with media relations declining once again.

That suggests that most respondents believe that the most attractive opportunity for PR is moving upstream, making themselves more valuable to clients on higher-margin strategic issues rather than tactical execution. In a world where traditional media appear to be in retreat, and the “news hole” is shrinking, a focus on helping companies with reputation strategy seems wise.

Finally, and not surprisingly, there was widespread agreement that artificial intelligence will play an increasingly significant role in the industry’s evolution. Once again, 86% of respondents identified it as one of the technologies that PR professionals would require greater competence (although the number who identified cyber-security as an issue increased dramatically, from 23% to 40%).

This is one area where North American agencies appear to be leading: 100% of them say AI tools are now integrated into everyday tasks (compared to just 69% in the UK and Asia).

## THE PR INDUSTRY'S DUAL REALITY: CHALLENGES AND OPPORTUNITIES AHEAD



**James Endersby**

CHIEF EXECUTIVE  
OPINIUM

We are excited to continue our partnership with ICCO on the World PR Report for a fifth year. Through this annual study, we provide PR leaders and influencers with the strategic knowledge and insights they need to tackle challenges, seize opportunities, and establish themselves as valuable assets to clients, competitors, potential partners, and future talent.

PR Industry Faces Economic Hurdles but Stays Optimistic About Growth and Profitability

The industry continues to recognise the challenges posed by global economic conditions.

Top concerns for the year ahead include clients unwilling to commit sufficient funds (37%), economic conditions generally (34%), and financial pressures to meet profit/margin targets (26%). Yet the majority (67%) remain optimistic about the growth of public relations in their market and expect an increase in profitability (61%) this year.

Corporate reputation (31%) and strategic consulting (28%) remain the biggest growth service areas. In fact, almost three in four (74%) agree that companies in their market are paying more attention to corporate purpose.

Interestingly, in the context of an election-filled year across the globe, the number of respondents indicating their public affairs/government relations service has increased from 13% last year to 16% this year. Only corporate reputation (37%) and strategic consulting (38%) rank above public affairs/government relations (23%) in service areas that the PR industry is expecting to grow over the next 12 months.

Given the constant evolution of new tech and utilisation of AI, it may be no surprise that by some margin the technology industry (46%) has been the biggest growing client sector over the past year.

Ahead of healthcare (32%) and financial services (27%) who round out the top three.

## AI Drives Innovation in PR: Enhancing Efficiency and Shaping the Future of the Industry

It's not just clients embracing AI, three in four (74%) PR professionals say their organisation has integrated AI tools into their everyday processes. Additionally, almost half (47%) believe mastery of AI tools will be the most useful skill set for PR executives in the next decade, ranking above other skills such as strategic consulting (44%), crisis counsel (30%) and measurement, evaluation and analytics (26%).

Overall, the majority (79%) believe the impact AI tools will have on the industry will be significant, with a third viewing them as game changing and likely to have the biggest impact on the industry in decades. While excitement about AI's potential is high, many industry professionals are contemplating the implications of increased efficiency on staffing levels within the sector.

# OPINIUM SUMMARY



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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# GLOBAL RESULTS

These results are based on findings from an online survey conducted between July and November 2024.

227 PR professionals were surveyed from the following regions:

Africa

Asia-Pacific

Eastern Europe

Western Europe

United Kingdom

North America \*

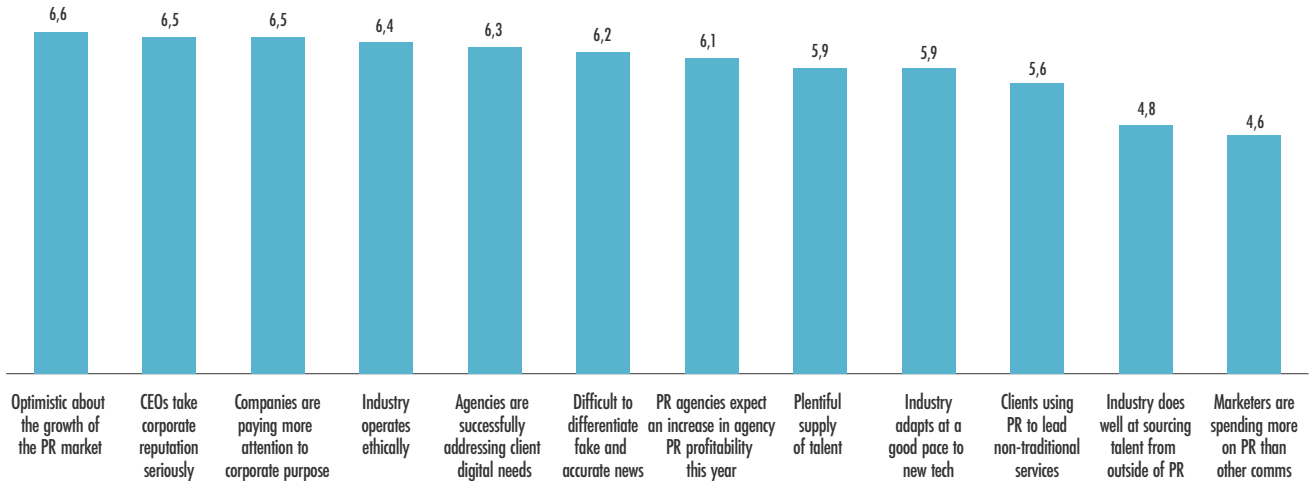
Latin America \*

Middle East\*

\*Sample sizes less than 20 participants

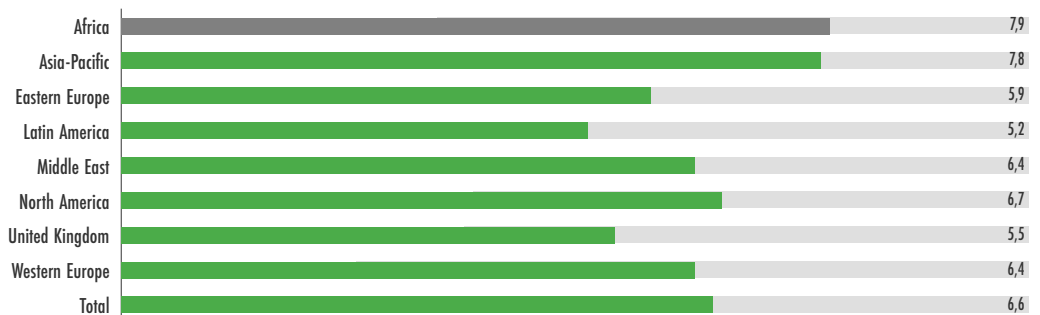
# GROWTH AND OPPORTUNITY

## Perceived growth and opportunity

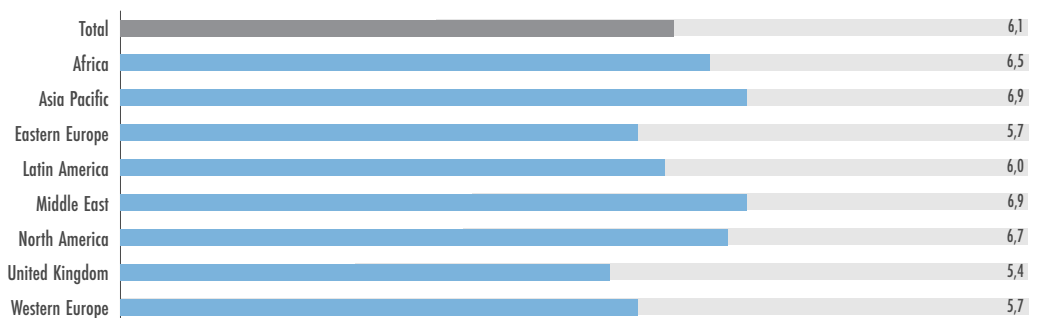


## Average levels of agreement on a 10 point scale

**I am optimistic about the growth of the public relations market**



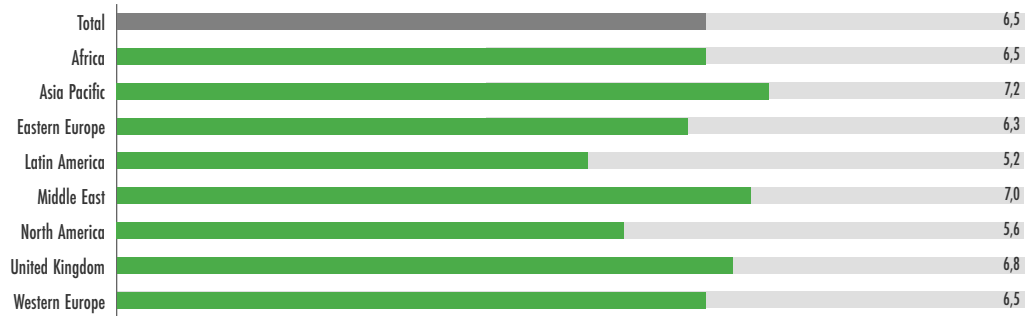
**I expect an increase in agency profitability this year**



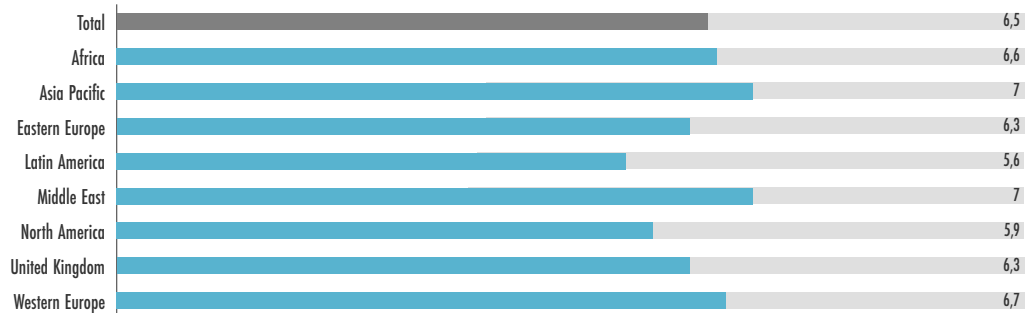
Base: All who work in PR (291)Q1. "Tell us how much you agree with these statements as they relate to on a scale of 1 to 10, where 1 = strong disagreement and 10 = strong agreement."

# GROWTH AND OPPORTUNITY

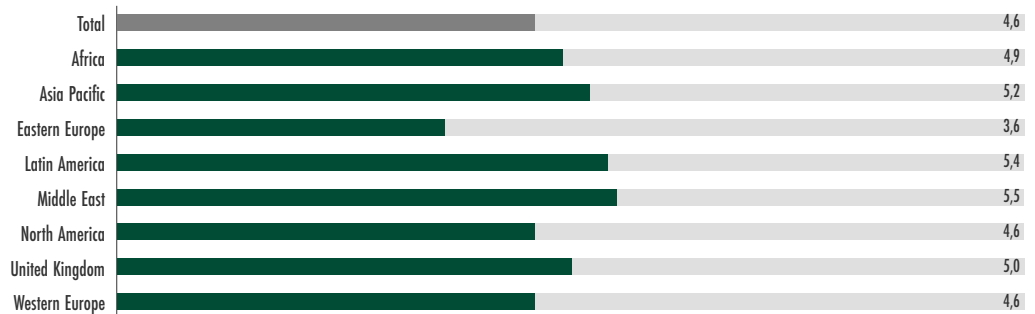
## Corporate CEOs take corporate reputation seriously



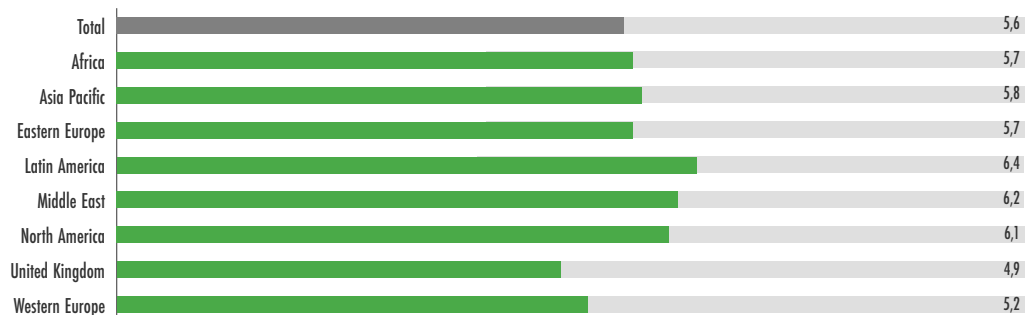
## Companies are paying more attention to corporate purpose



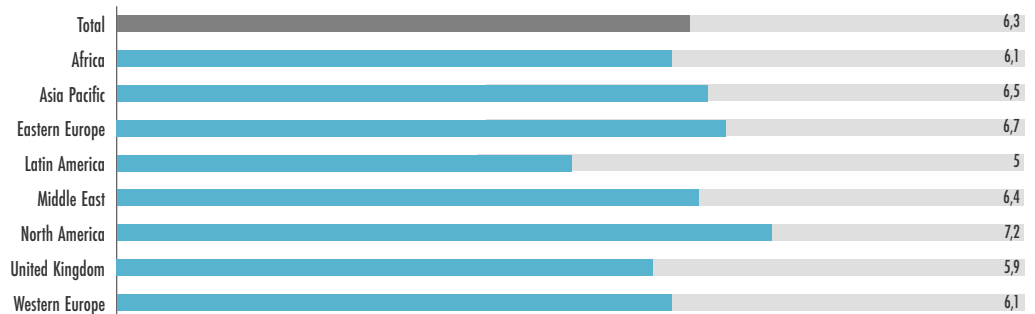
## Marketers are spending more money in comparison to other communications disciplines



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



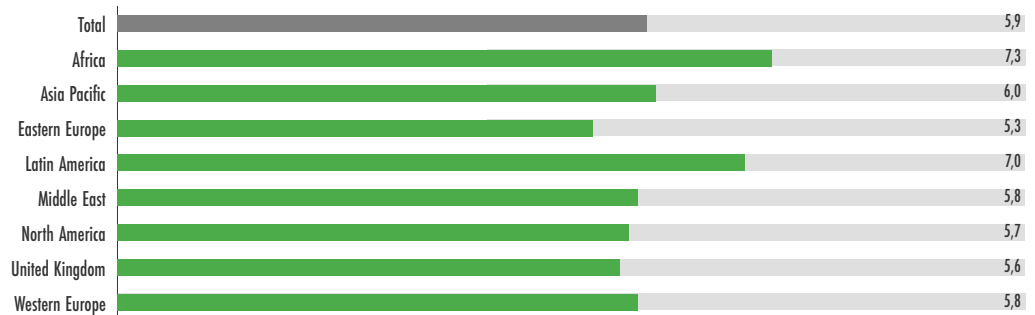
## PR agencies are successfully addressing client digital needs



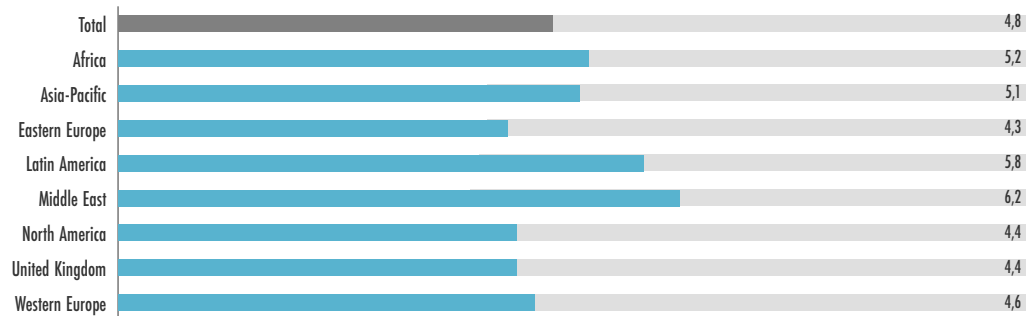
Participants indicated how much they agreed with each statements, in relation to their market, on a scale of 1 to 10, where 1 = strong disagreement and 10 = strong agreement\*

# GROWTH AND OPPORTUNITY

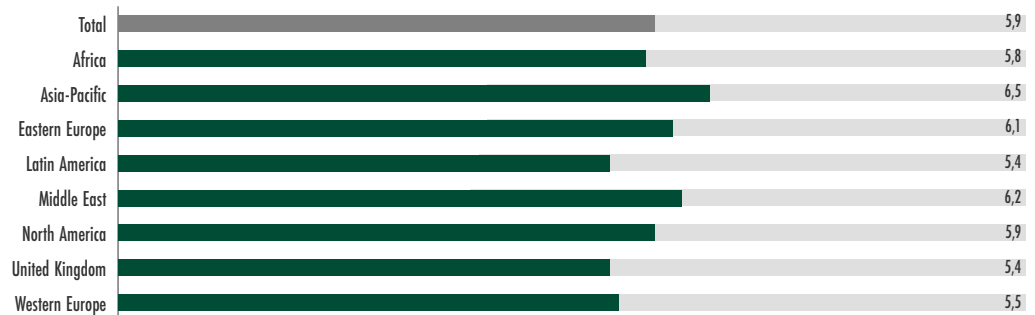
**There is a plentiful supply of talent**



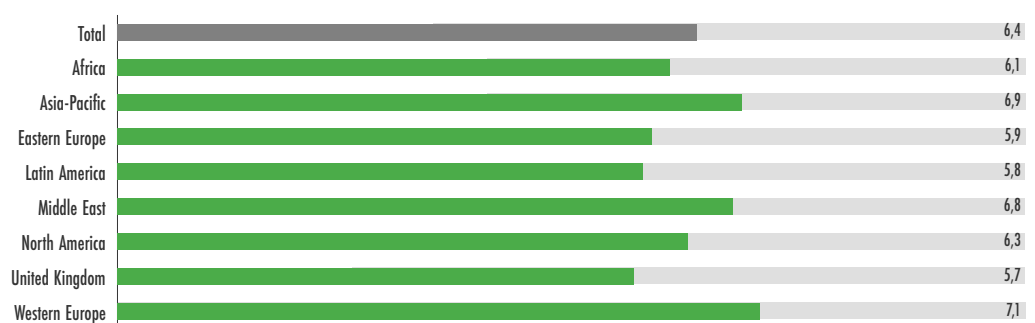
**The PR industry does a good job of sourcing talent from outside the industry**



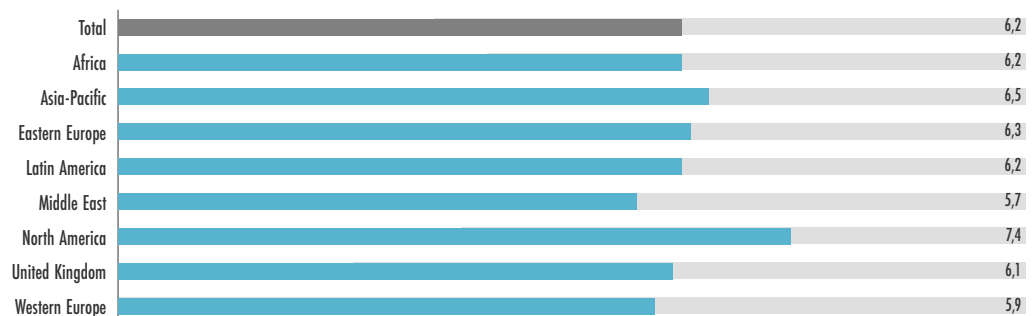
**The PR industry is adapting to new technologies at an appropriate pace**



**The PR industry in my region operates ethically**



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

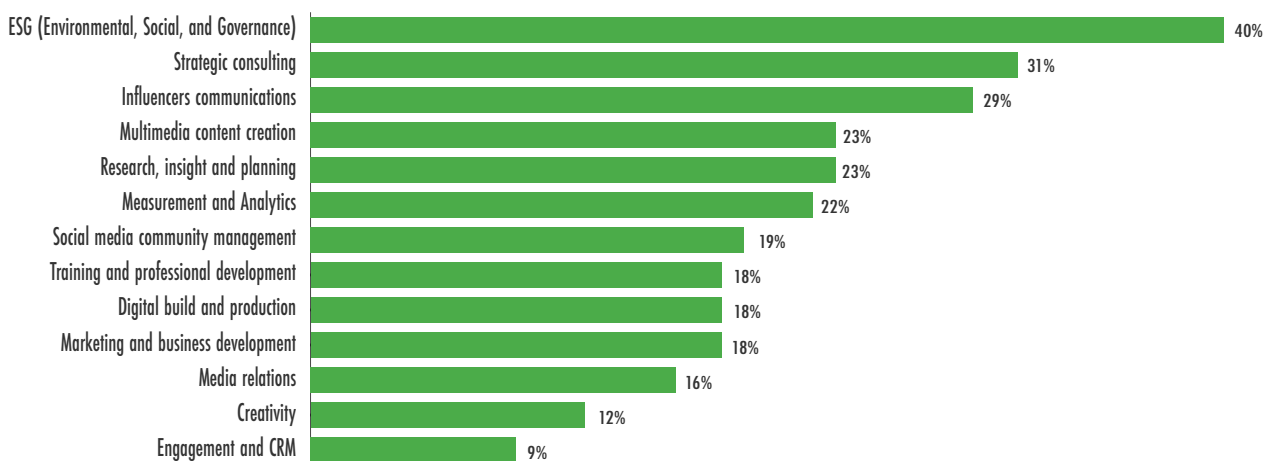


Participants indicated how much they agreed with each statements, in relation to their market, on a scale of 1 to 10, where 1 = strong disagreement and 10 = strong agreement'



# GROWTH AND OPPORTUNITY

## Expected areas of investment



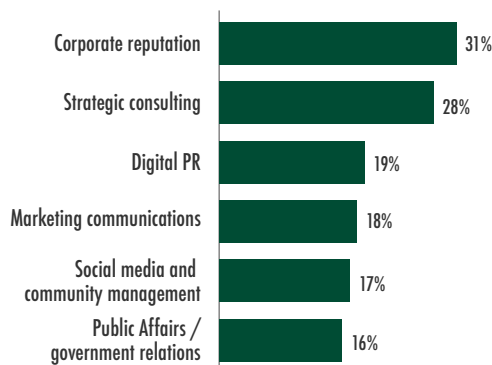
## Areas of growth - last year



**Corporate reputation**  
**31%**



**Strategic consulting**  
**28%**



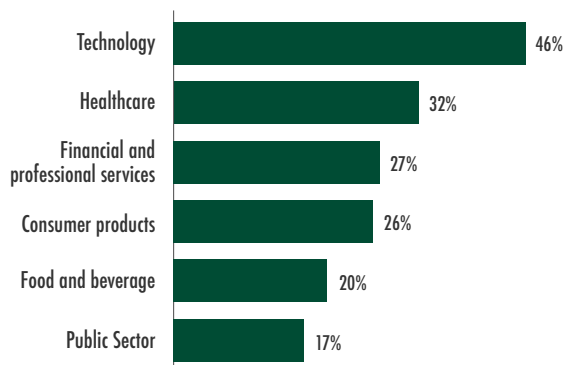
## Sectors of growth - last year



**Technology**  
**46%**

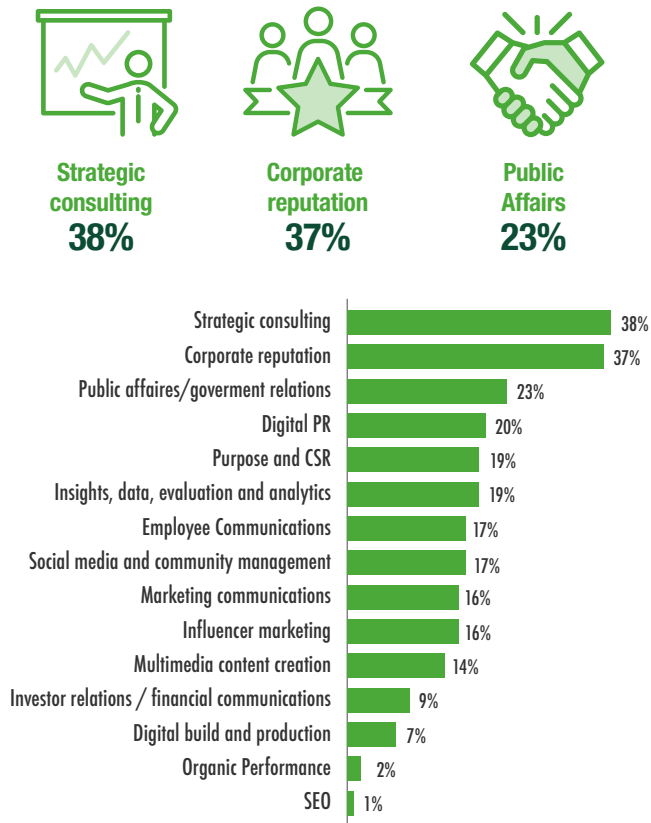


**Healthcare**  
**32%**

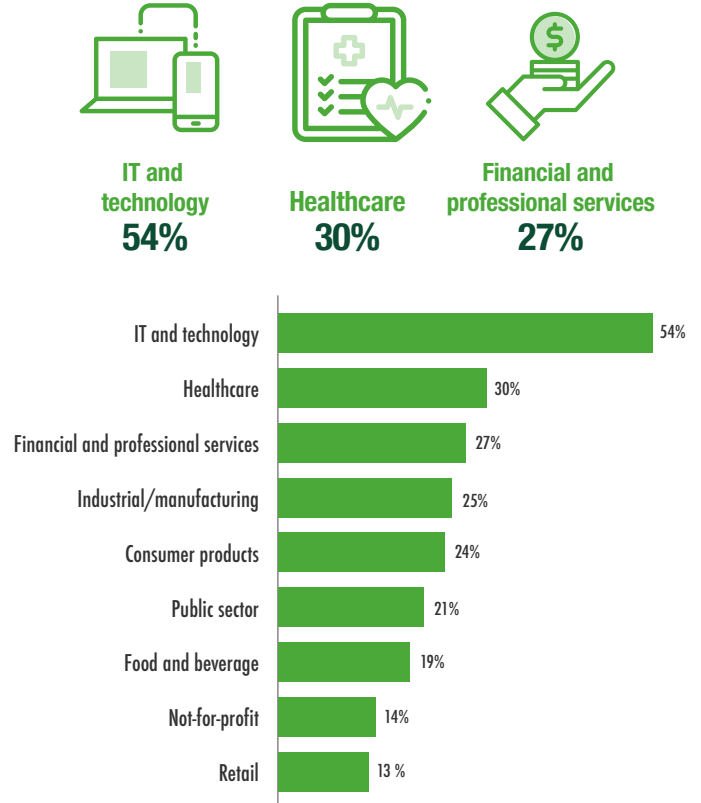


# GROWTH AND OPPORTUNITY

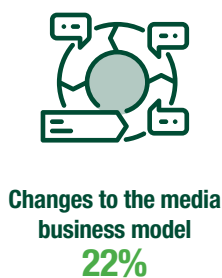
## Expected areas of growth



## Expected sectors of growth



## Greatest challenges for the PR firms in the next 12 months



## CHANGING TIMES CALL FOR CHANGING TALENT RECRUITMENT



**Morten Vester Haldrup**

CO-CHAIR ICCO NEXT GEN  
GROUP & INDEPENDENT  
COMMUNICATIONS ADVISOR

**The PR-industry, and indeed the world, is on the cusp of a new era ushered in most prominently by the advent of technologies such as AI. This calls for changes not only to how we work, but judging by the results of this year's World Report, also to how and where we find the people that make up our workforce.**

Compared to last year, there has been a drop when it comes to the perception of the availability of talent (from 6.2 to 5.9 on a scale of 0-10) and the ability to recruit from outside the industry (from 5.0 to 4.8). That kind of drop may not usually be a big deal, but when we view it in light of technology and healthcare overwhelmingly ranking as the two major sectors of growth by far - with a respective 54% and 30% of

respondents choosing these - it begs the question of whether the industry needs to be looking to a wider range of sectors in order to remain relevant.

Both technology and healthcare are highly complex sectors, both with regards to the technical understanding itself as well as the understanding of regulations and the stakeholder landscape. Yet, the most likely sources of talent in 2025 are rival agencies (62%), graduate programmes (54%), and journalism (47%), whereas government and politics (10%) and research and analytics (10%) are among the least likely. Given the expected growth of technology and healthcare, do we need to reconsider whether this is the right way to prioritize when it comes to recruitment as well as retention?

**Broadening the pool of talent to include other fields and professions not traditionally associated with PR could be a great contribution to the industry as a whole.**

One could easily imagine the former medical student turned PR professional helping improve public health. However, it also poses a challenge in how to appeal to potential co-workers who may have never considered PR as a career path or maybe never heard of the industry. The good thing about this challenge is that it concerns communications, which is precisely what we do.

How to go about getting the right talent will of course depend on the specifics of each situation, but a few insights from our recent [Next Gen PR Report](#), detailing the perspectives of PR-professionals aged 18-35, may prove useful in this regard.

As a generation, we found that they are highly motivated by working creatively as well as by solving complex issues. Furthermore, the opportunity to make a positive impact on society or others rank among the most important reasons to pursue a career in PR as well as what inspires them.

Highlighting the PR-industry as an avenue for these aspirations may just bring more people into the fold from other fields, and the results from this year's World Report may indeed point to the need to do so.

After all, as the saying goes, you need to build the ark before the flood, and we might just be seeing a drizzle on the horizon.

# TALENT AND CHALLENGES

## Expecting to source talent from

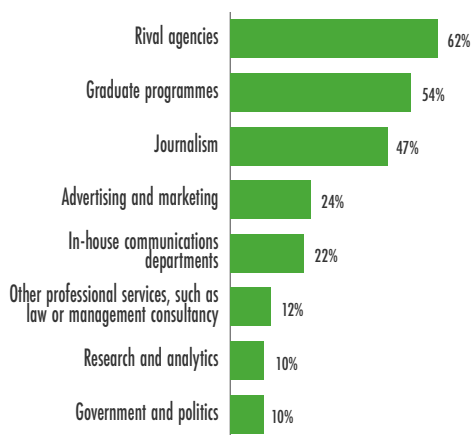


Rival agencies **62%**

Graduate programmes **54%**



Journalism **47%**



## Talent strategy challenges

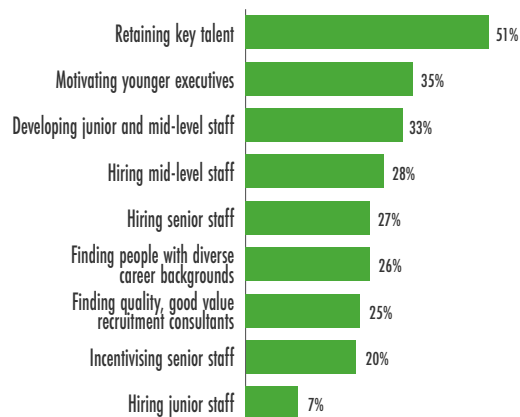


Retaining key talent **51%**

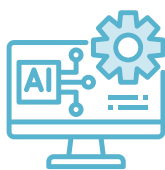
Motivating younger executives **35%**



Developing junior and mid-level staff **33%**



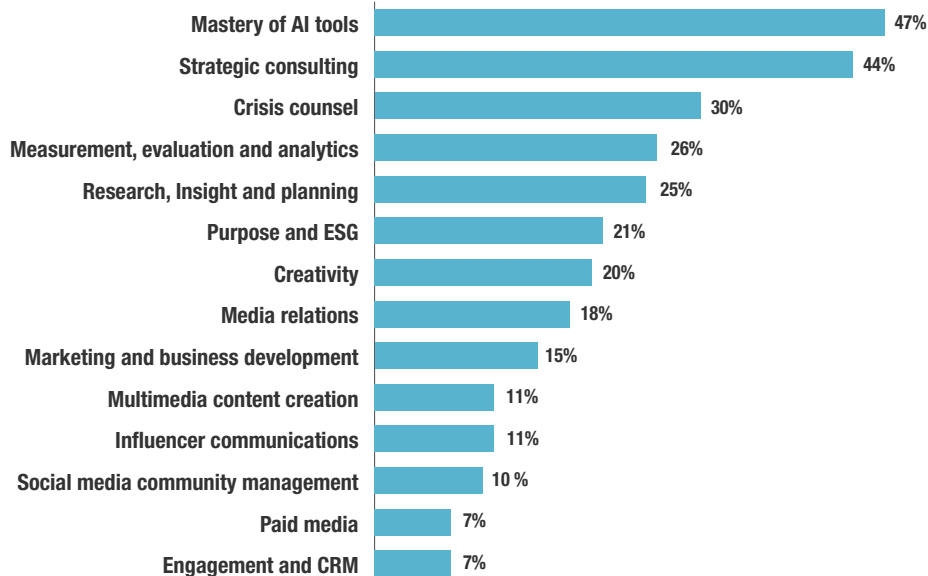
## Future talent relevant skill sets



Mastery of AI tools **47%**



Strategic consulting **44%**





## THE ISSUES AFFECTING THE RETENTION OF FEMALE TALENT



**SUSAN HARDWICK**

**PRESIDENT AND CO-FOUNDER  
GLOBAL WOMEN IN PR**

**Looking at the results from the 2024-2025 ICCO World PR Report the issue of retaining talent remains a key concern globally. With women making up more than half of the workforce this is an issue that is extremely relevant – how do we retain talent and in particular female talent?**

Our GWPR Annual Index looks in detail at the reasons that many women leave the industry early and why those who remain feel that they are underrepresented when it comes to promotion and having a seat at the boardroom table. Retaining female talent is key to ensuring the on-going success of the PR and Communications industry.

Our Global Index revealed that we need to do far more to enable more women in PR and communications to not just stay, but also succeed in their careers.

The career progression of women working in the industry is being impacted by various factors with caring responsibilities and flexibility being key issues.

Women continue to want more flexibility at work and for the first time in our Index, there is a big desire across all levels for compressed hours, indicating perhaps that long work hours and the demands of our industry leave little time for personal commitments.

Whilst there are also positive shifts in some areas, these are small percentages and not enough to celebrate.

Whilst women believe they are being more assertive and proactive in asking for promotions the issue of caring responsibilities is impacting their career progression and many feel that companies – both agencies and in house - are not doing enough to introduce family friendly policies that will encourage more women to stay in the industry.

### **More policy support for helping to retain women was seen as an important way forward.**

Another key issue for women was ageism with many women not seeing themselves working in the PR industry past the age of 50. In an age group where we have the most experienced women, we are losing them.

Our survey showed that a fifth of women say they would like to move out of PR/Comms after 50, whilst a fifth in agencies say they would like to take on in-house roles.

So, what do we need to do to retain women in PR and communications and help more women progress into senior positions?

The answer perhaps lies in the responses in our survey – flexible working practices, senior role models, recognition of the issues around gender inequality by leaders, mentoring programmes and training.

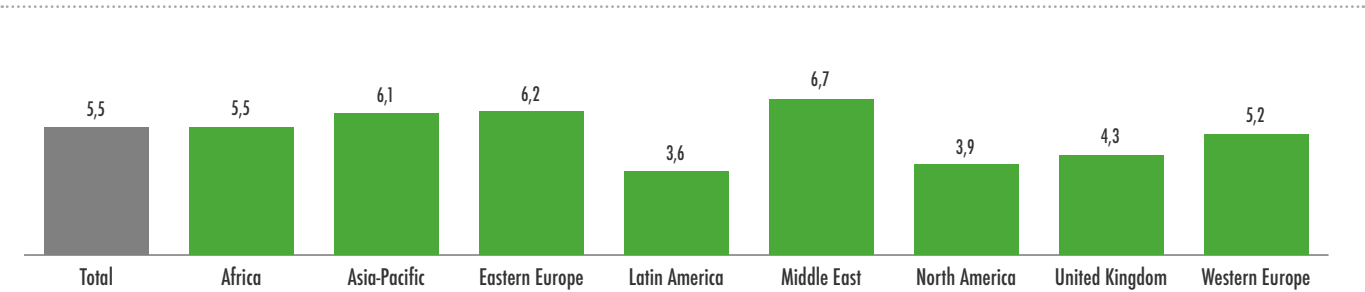
We hope this year's Index will highlight the challenges as well as the opportunities to drive the changes needed to make a real difference for women working in our industry and for these changes to benefit all – without focusing on the changes and policies needed to encourage more women to remain in our industry we are not serving our industry well – it is time for change and we need to focus NOW on the best way forward so that the number of female leaders and senior consultants does not continue to fall. It is not only the right thing to but makes sense commercially... we do not want to see in 2025 a continued decline in the number of women on boards and in senior roles.

Balanced board rooms, It has been proven time and time again, make for more successful businesses.

For more information and details of the findings from our 2024 GWPR Annual Index can be found on our website [www.globalwpr.com](http://www.globalwpr.com)

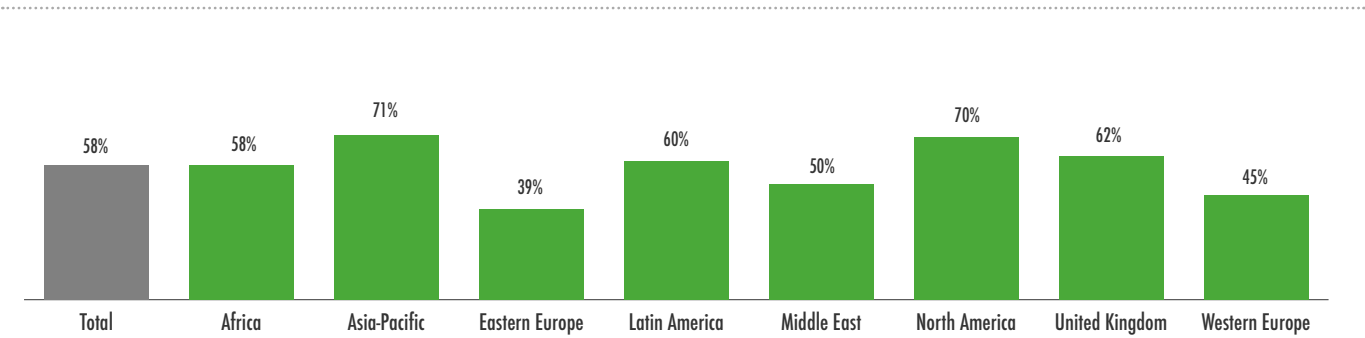
# DIVERSITY AND INCLUSION

## Diversity - reflecting ethnicity demographics

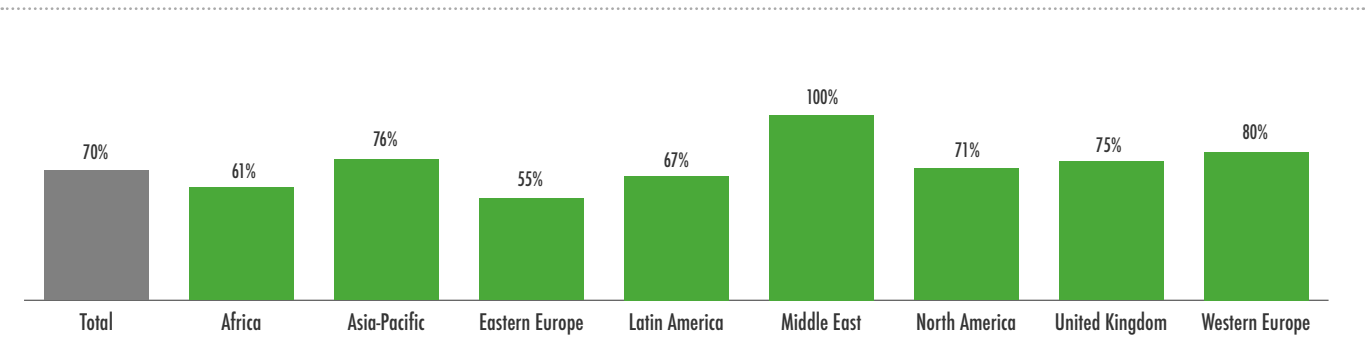


1 = Highly unrepresentative and 10 = highly representative

## % of firms that have a diversity and inclusion policy

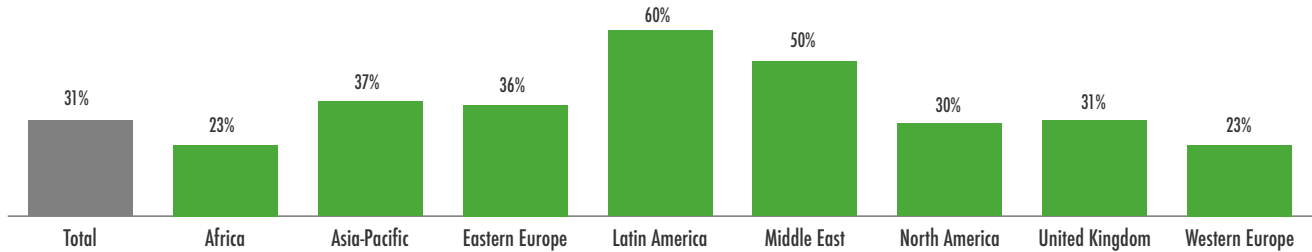


## % of firms that have dedicated, trained D&I personnel

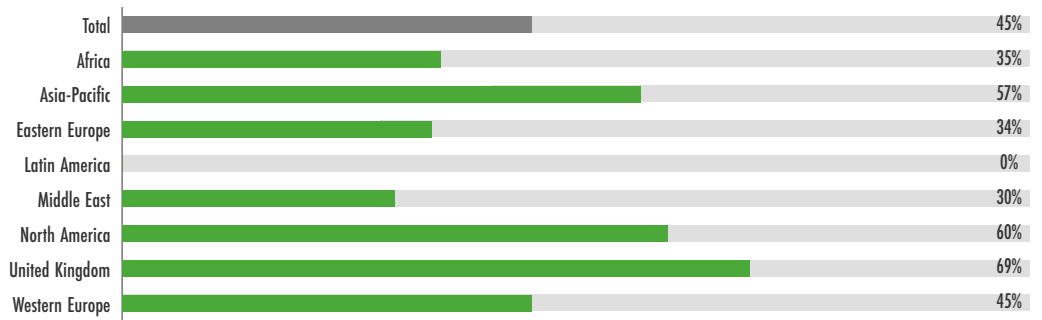


# MENTAL WELLBEING IN THE WORKPLACE

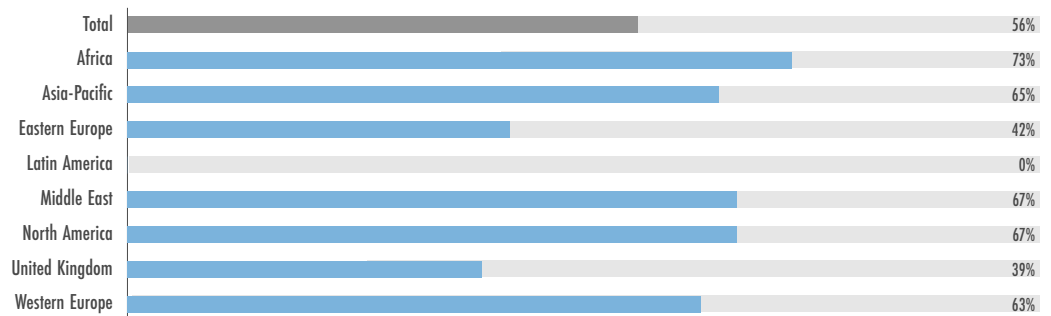
## % of respondents that have experienced mental health problems in the last 12 months



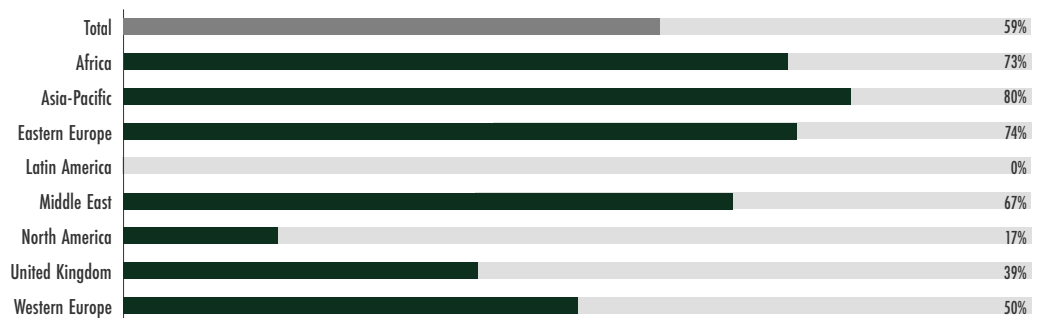
## % of firms that have formal mental health and wellbeing support



## % that agree mental health support from their organisation is effective in tackling mental health issues



## % that agree mental health support from their organisation has improved over the last 12 months



# DIGITAL TRENDS

## Most relevant technologies – future prediction



Artificial  
Intelligence  
**86%**



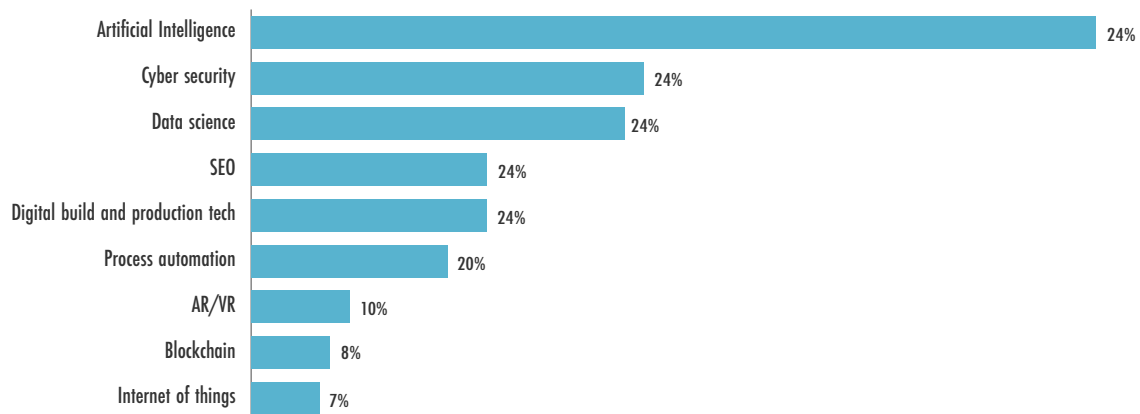
Cyber  
security  
**40%**



Data  
science  
**38%**



SEO  
**24%**



## Areas of PR in which tech is predicted to have greatest impact

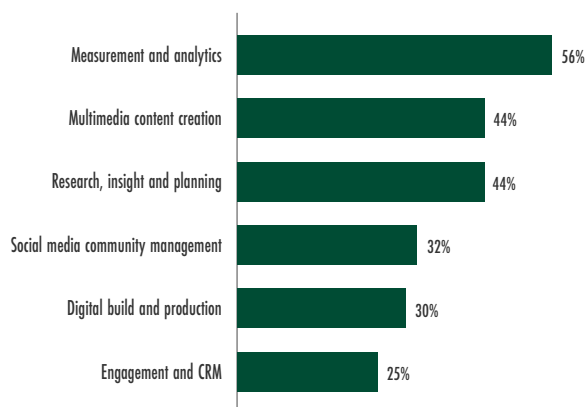


Measurement and analytics **56%**

Multimedia content creation **44%**



Research, insight and planning **44%**



## Prediction of important future tech applications within businesses

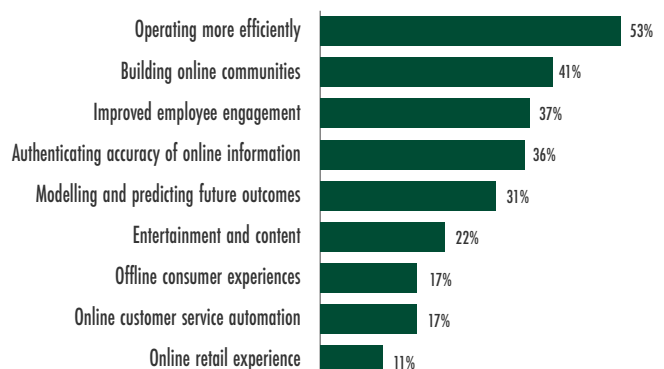


Operating more efficiently **53%**

Building online communities **41%**



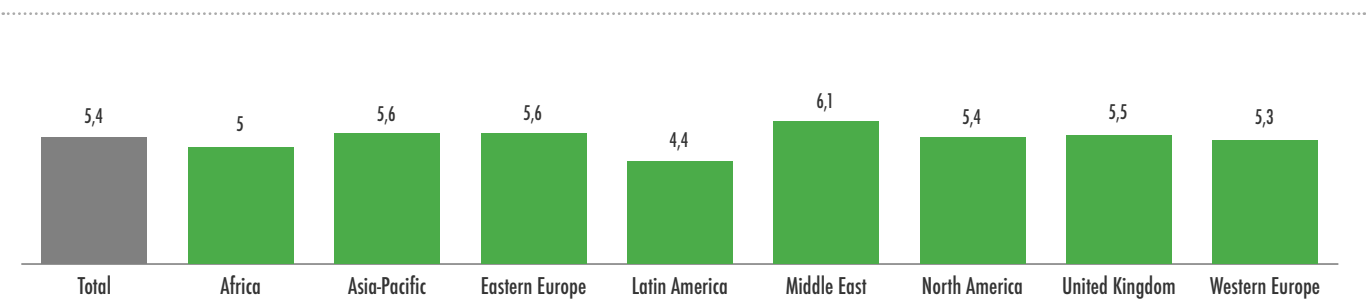
Improved employee engagement **37%**





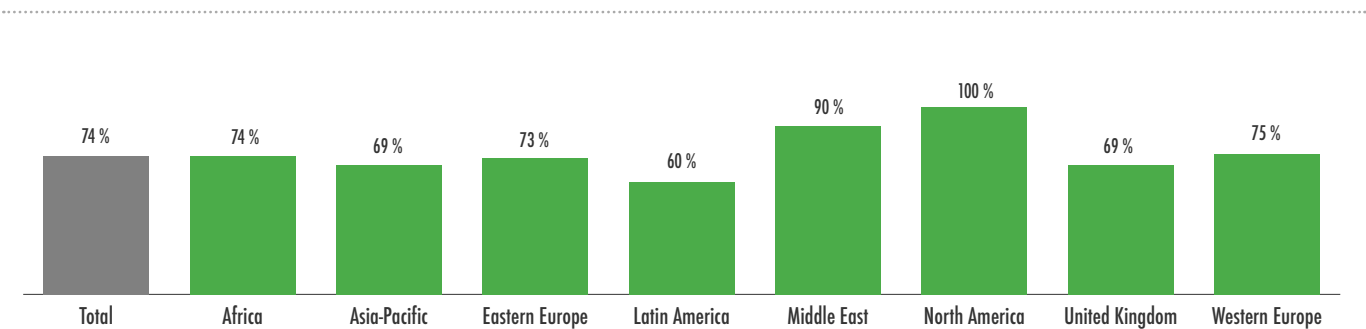
# DIGITAL TRENDS

## Rating of adoption of new technology by regions

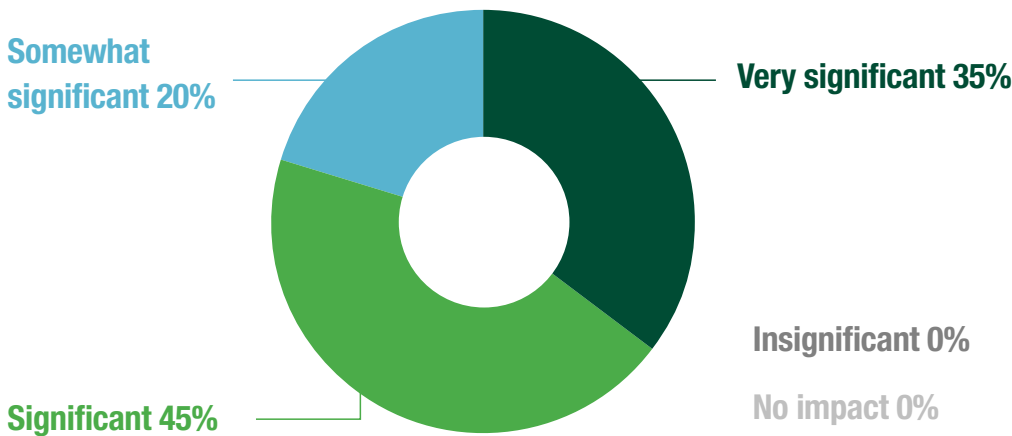


Respondent indicated whether their workforce was representative of their local ethnicity demographics

## % that have integrated AI tools into their everyday processes



## Perceived impact that AI tools will have on the PR industry



# MEASUREMENT AND EVALUATION

## MEASUREMENT UPDATE



**KHALI SAKKAS**

GLOBAL HEAD OF INSIGHTS  
CARMA

**While the survey results show mixed results when it comes to measurement and evaluation, ICCO's latest survey highlights four industry trends to keep on your radar.**

### The rise of reputation as an intangible asset

Building and protecting corporate reputation remains the most important business objective for clients. ICCO survey respondents said that 61% of clients see corporate reputation as their leading business objective, well above increased sales and crisis management. While reputation measurement and management has always been recognised as an important outcome of PR and Comms, it has emerged as the priority over the last few years.

As an intangible asset, its significance has been on the rise amongst clients, especially amongst global CCOs who now view reputation as the most important area of investment. We're seeing the scope of the CCO role expand over time, and this is driven by their ability to be the guardian and steward of corporate reputation.

### Big expectations for AI-powered insights

When asked to predict which areas of PR would be most impacted by AI, 56% of respondents stated the biggest impact would be in measurement and analytics. This was followed by multimedia content creation at 44%. This level of expectation is encouraging for the measurement and evaluation industry. AI can now provide us with accurate analysis at speed and scale, enabling real time decisions based on credible data. Moving beyond this, AI is poised to deliver something far more ground-breaking for PR and Comms. AI has the power to be to demystify measurement and analytics, making it simpler and accessible. Harnessing the power of business analytics will become simpler and achievable for those without specialist data skills.

### Measurement used in multiple ways to enhance performance

It is positive to see the different ways that measurement and research is used to optimise communications effectiveness.

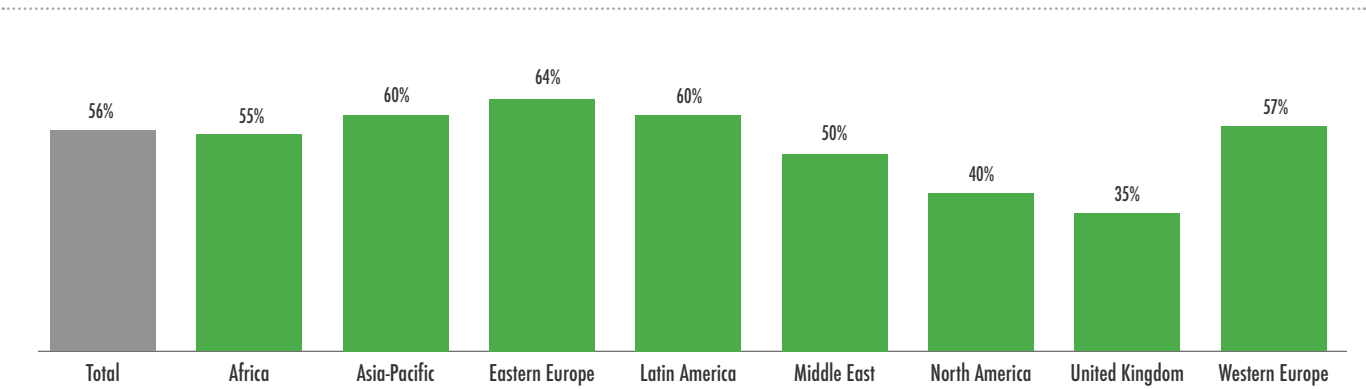
Most organisations use measurement and evaluation for reporting (73%), yet measurement also plays a strong role in planning (50%) and decision-making (48%). This is an encouraging development that shows most of the industry agents/members/actors are leveraging insights from their measurement programmes. Actionable insight and looping learnings into the planning process are the best practice and pivotal for continuous improvement. We loved seeing the different uses of measurement highlighted in this year's survey results.

### Asia-Pacific adopts AMEC resources more than any other region

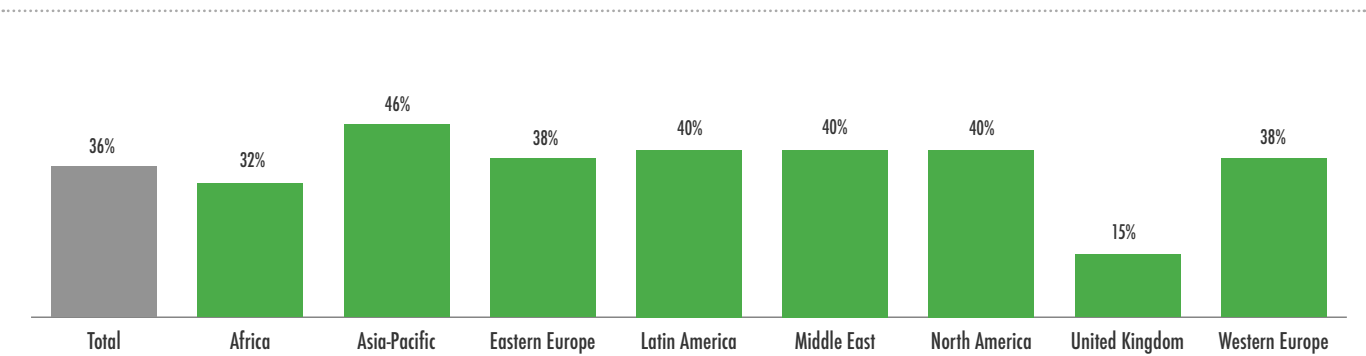
This year's results show that there is still more work to be done to advocate and educate for best practice measurement and evaluation globally. While AMEC tools and resources are used in all markets, there is still more advocacy required to show organisations how to design and implement compelling measurement. The strong results for AMEC in the APAC region (46% compared to the average of 36%) emphasise the importance of local connections and advocacy in local language. The continued effort to translate AMEC's Integrated Evaluation Framework into over 22 languages is an important initiative that will continue to help adoption in emerging markets.

# MEASUREMENT AND EVALUATION

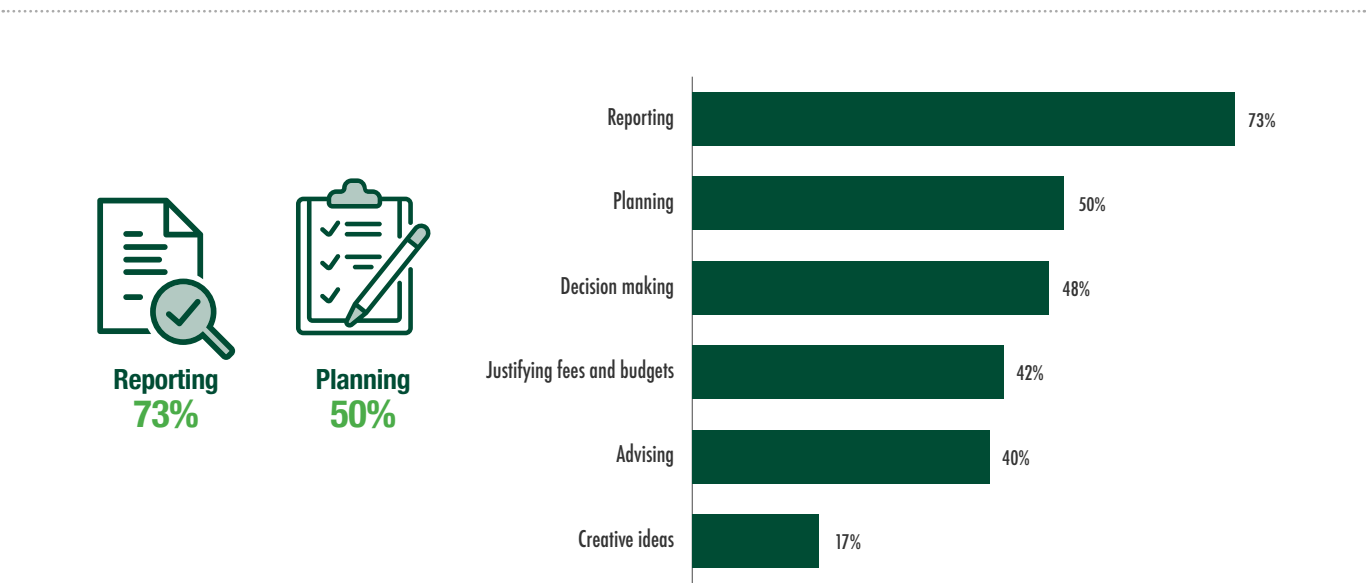
## Will provide AVE by region



## Use AMEC Frequently/Sometimes



## What measurement and evaluation metrics are most used for



# CLIENT REQUESTS

## Most likely client requests



Media  
clippings **52%**

Engagement  
metrics **39%**



Advertising value  
equivalency (AVE) **31%**

Awareness metrics **29%**



Web traffic analytics **28%**

Media summaries **28%**



## Most important objectives for clients



Improve corporate  
reputation (proactive)  
**61%**



Increased  
sales  
**46%**



Issues and crisis  
management  
**37%**



Sustainability and  
environment  
**59%**



Diversity and  
social inclusion  
**28%**



Technology  
empowerment  
**25%**



## THE EVOLVING ETHICS OF PR IN A WORLD OF AI AND DISINFORMATION



### CHRISTINA FORSGÅRD

FOUNDER, CYBER CRISIS CONSULTANT,  
ICCO ETHICS CHAIR, PRIVACYRULES  
CYBER CRISIS COMMUNICATIONS CHAIR

**The PR industry's commitment to ethics continues to evolve in response to geopolitical challenges, technological shifts, and societal demands. This year's global report reflects both progress, and the need for stronger ethical leadership in an increasingly complex world.**

Despite massive challenges, the PR industry is uniquely positioned to lead by example. A global consensus of 91% believes PR agencies have a responsibility to steer clients away from ethically questionable actions.

The high rate of agencies declining clients or projects for ethical reasons, 73% globally, demonstrates an extremely strong commitment to values over profits. Balancing income with ethics remains a pressing concern for 37% of respondents, reflecting the tension between profitability and maintaining transparency and integrity.

Adding to this complexity is the lack of consequences for unethical behavior, with 38% of respondents identifying it as a significant barrier to accountability, particularly in markets where economic pressures dominate decision-making. Globally, the PR industry's ethical performance is rated at 6.4/10, highlighting still room for improvement.

### PR's greatest challenge is misinformation

Misinformation is the top ethical concern globally, cited by 40% of respondents. The growing sophistication of AI tools exacerbates this issue, making it increasingly difficult for PR professionals to address reputational crises created by false narratives and polarizing algorithms.

In Europe, Russia's ongoing war against Ukraine has intensified the challenge of combating misinformation and disinformation.

This conflict has fueled state-sponsored propaganda and fake news campaigns, eroding trust in media and communication systems.

Economic pressures from sanctions and the exodus of companies from the Russian market have further tested the PR industry's resilience. Agencies face the dual challenge of navigating complex geopolitical realities while upholding ethical values, often at significant financial cost.

### AI, polarized discourse and ethical vigilance

North America continues to grapple with polarized political discourse, compounded by the rise of AI-driven misinformation tools. The region scores high on the difficulty of distinguishing between accurate information and fake news, underscoring deep societal challenges.

AI's influence is particularly evident in regions like Asia Pacific. However, the region's high adoption rates of ethical codes demand greater vigilance in ensuring responsible AI use.

In Latin America, the lower adoption rates of codes of conduct, 20%, might reflect systemic barriers to implementing robust ethical frameworks. This is mirrored by a lack of confidence in the PR industry's ethical standing compared to other sectors.

# ETHICS IN THE INDUSTRY

## The role of AI and the Warsaw Principles

AI is both an opportunity and a challenge for the PR industry. While it enhances efficiency and allows for innovative approaches, it also poses significant risks of content manipulation and misinformation amplification. To navigate these risks, adopting ICCO's Warsaw Principles for the ethical use of AI in PR is crucial. These principles emphasize transparency, accountability, and the protection of human rights in AI-driven practices.

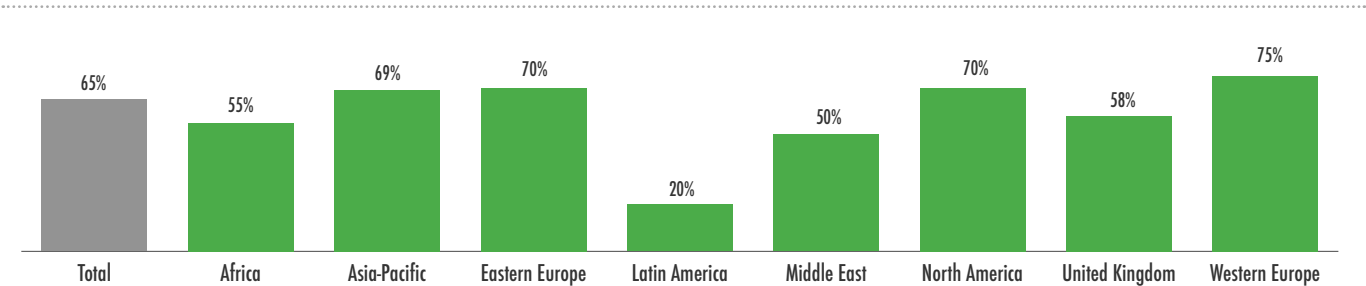
Responding to the ethical challenges, the PR industry can reinforce its role as a trusted force for good. The ability to balance innovation with integrity will define its future.

The stakes are higher than ever, but so is the potential to shape a more ethical and informed world. PR professionals hold immense power to influence public discourse and corporate behavior, offering the chance to drive meaningful change through ethical practices.

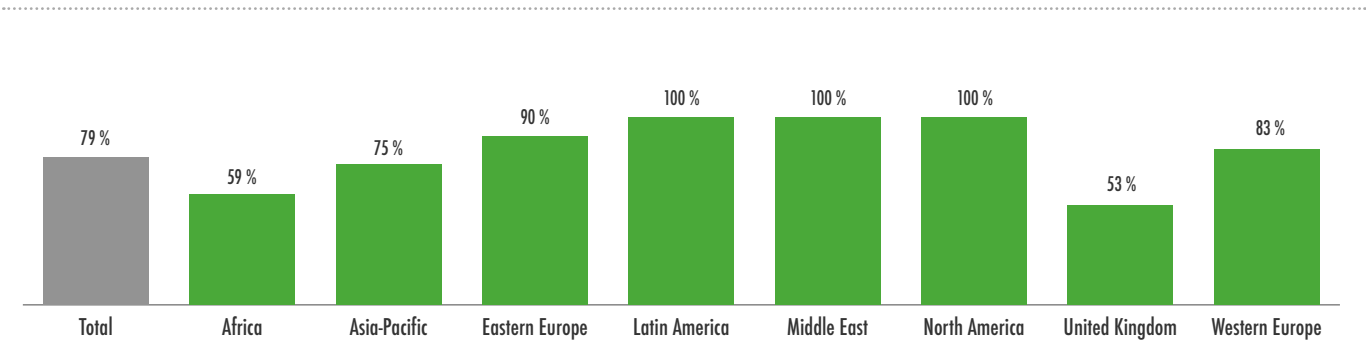


# ETHICS IN THE INDUSTRY

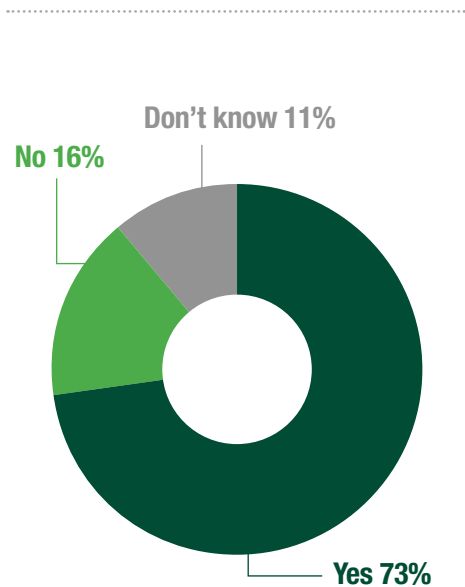
## % by region of those signed up to a industry code of conduct



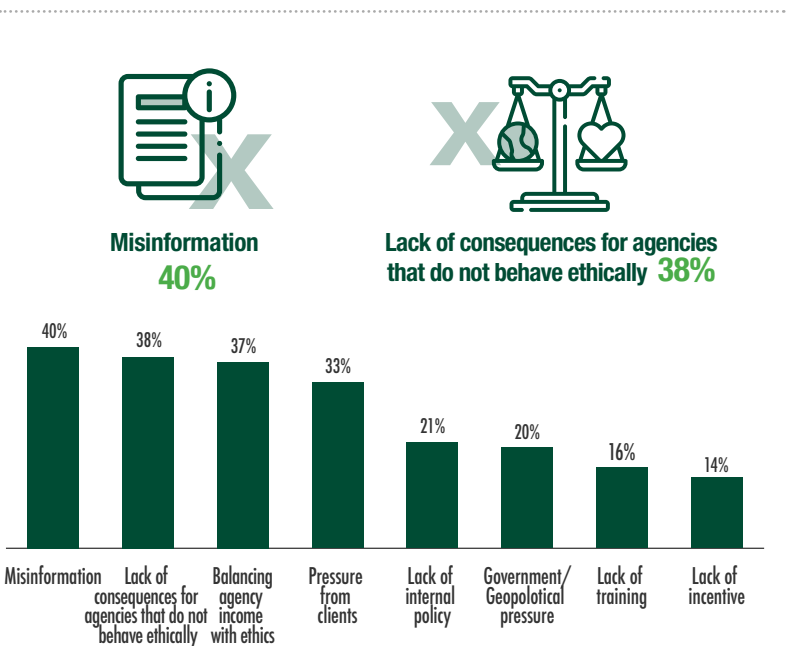
## % by region of those know the guidelines they are signed up to well



## Turned down a client or a job due to ethical reasons

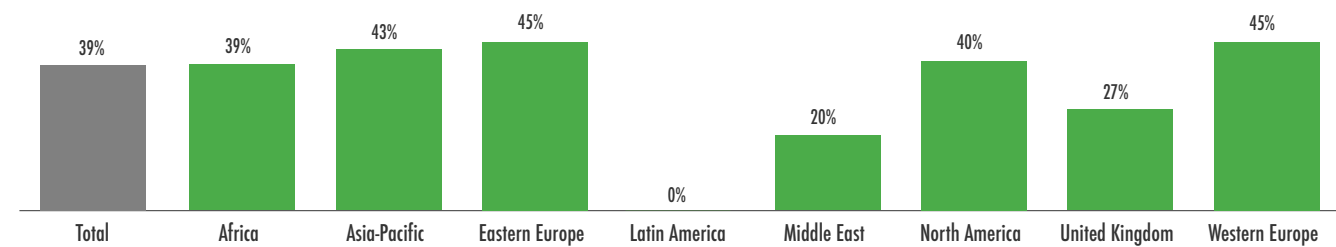


## Greatest challenges for the PR firms in the next 12 months

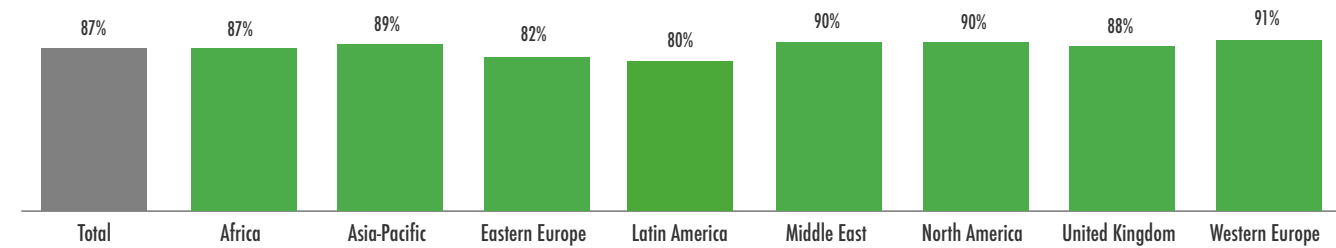


# ETHICS IN THE INDUSTRY

## % who believe the PR industry is more ethical than other industries



## % who believe it is the role of PR agencies to advise clients against behaviour that they deem unethical





# REGIONAL RESULTS



## Top 3 most commonly selected answers



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

1. Corporate reputation
2. Strategic consulting
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 areas do you expect an increase in PR firms' investment this year?

1. ESG
2. Strategic consulting
3. Influencers communications



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

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



Which 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 behaviour / clients



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. Mastery of AI tools
2. Strategic consulting
3. Crisis counsel



Which of the following social issues, if any, are your clients most likely to prioritise?

1. Sustainability and climate change
2. Diversity and social inclusion
3. Technology empowerment





## RESILIENCE, DIGITALISATION, AND ETHICAL PR PRACTICES



**Bridget von Holdt**

ICCO REGIONAL PRESIDENT: AFRICA  
CO-CEO OF BURSON AFRICA

### Africa has an exciting period of growth and opportunity for the public relations industry ahead

Despite facing some challenges, the region has shown resilience and adaptability, leveraging the digitalisation and focusing on ethical business practices to drive success. The positive outlook is further bolstered by a commitment to social issues, indicating a promising future for the African PR landscape.

In Africa, the PR industry experienced significant growth in several areas last year. Top sectors that saw substantial growth include social media and community management, marketing communications, and corporate reputation.

This growth aligns with the increasing digitalisation trend and the rising importance of maintaining a strong corporate image in today's business landscape.

The sectors that showed the most growth were technology, financial and professional services, and consumer products. The growth in these sectors reflects the continent's rapid technological advancements, burgeoning financial sector, and growing consumer market.

Looking forward, African PR firms anticipate increased investment in Environmental, Social, and Governance (ESG), social media community management, and influencer communications. ESG investment highlights the growing focus on sustainability and ethical business practices. Meanwhile, the emphasis on social media and influencer communications underscores the power of these platforms in shaping public opinion and driving consumer behaviour.

However, the industry also faces several challenges. The greatest hurdles include clients' reluctance to commit sufficient funds, general economic conditions, and financial pressure to meet profit/margin targets. Additionally, the inability to effectively measure the impact of PR poses a significant challenge.

Ethically, misinformation/disinformation and lack of internal policy on ethical behaviour were identified as the biggest challenges for PR professionals and agencies. This finding underscores the need for robust ethical guidelines and policies to combat the spread of false information and uphold integrity within the industry.

Talent strategy also presents challenges, with retaining key talent, developing junior and mid-level staff, and motivating younger executives being the main concerns. As the industry evolves, mastery of AI tools, strategic consulting, crisis counsel, and research, insight and planning have been identified as the most relevant skill-sets for PR executives in the next decade.

Finally, the report highlights that clients are likely to prioritise social issues such as sustainability and climate change, diversity and social inclusion, technology empowerment, education, and social media ethics. This trend indicates a shift towards more socially conscious and ethically driven public relations strategies.

In conclusion, while the African PR industry is experiencing growth and opportunities, it also faces challenges related to funding, economic conditions, measurement of impact, ethical considerations, and talent management. Despite these challenges, the industry is poised for continued growth, driven by digitalisation, ethical business practices, and a focus on social issues.



## Top 3 most commonly selected answers



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

1. Social media & community management
2. Marketing Communications
3. Corporate reputation



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 areas do you expect an increase in PR firms' investment this year?

1. ESG
2. Social media community management
3. Influencers communications



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

1. Clients unwilling to commit sufficient funds
2. Economic conditions generally
3. Financial pressure to meet profit/margin targets /Inability to effectively measure impact of PR



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

1. Misinformation / disinformation / Lack of internal policy on ethical behaviour
2. Lack of consequences for agencies that do not behave ethically or work for unethical clients / Pressure from clients / Government/Geopolitical pressure



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. Mastery of AI tools
2. Strategic consulting
2. Crisis counsel
2. Research, Insight and planning



Which of the following social issues, if any, are your clients most likely to prioritise?

1. Sustainability and climate change
2. Diversity and social inclusion
3. Technology empowerment
3. Education 3. Social media ethics

## RESPONSIBLE EMBRACE OF TECH WILL OPEN NEW DOORS



**Caroline Hsu**

CHIEF GLOBAL OFFICER,  
THE HOFFMAN AGENCY

**For many agencies in APAC, the past year has been unreservedly tough — so it's encouraging that the region remains buoyant about PR's growth potential. This year's ICCO World PR Report finds APAC to be the second-most optimistic after Africa with an agreement score of 7.8, equal to last year as overall sentiment fell (North America recorded a 6.6 score versus 8.2 in 2023).**

Together with the Middle East, APAC also leads in expecting a rise in growth and profitability (6.9, up from 6.7).

There are several drivers behind this bright outlook. The tech sector is as dynamic and complex as ever and global respondents unsurprisingly see it as the biggest growth driver for the coming year, as it was in 2024.

While the incoming US administration seems to bode well for tech, companies must also reckon with increased regulatory scrutiny and geopolitical uncertainty, areas where PR naturally has a valuable role to play.

More respondents in APAC than anywhere see CEOs taking corporate reputation seriously (rather worryingly, North America logged the second-lowest score). APAC and the Middle East also lead in seeing companies put more emphasis on corporate purpose. Both these trends are obviously good for PR professionals, whose bread and butter is communicating values in a compelling way.

Beyond more traditional activities, APAC also looks well prepared to meet the challenges of the future. The regional industry leads in thinking it is adapting to new technology at an appropriate pace. This is important when you consider the global view that mastery of AI tools will be the most important skillset for the next decade (47%), ahead of strategic consulting, which was last year's top consideration. Added to that is a greater belief that APAC has a healthy talent pool (6.0, up from 5.0).

Yet there are obvious areas for APAC's PR industry to address. APAC might be the third highest in terms of adopting new technology but ranks the second lowest in terms of the integration of AI tools into everyday processes (69%).

The industry is right to tread with some caution — it shouldn't see AI technology as a wholesale solution to daily challenges. But it does need to roll up its sleeves and experiment with the tools on offer. Failing to do so risks falling behind and missing opportunities to innovate.

Experimentation with technology does of course call for guidelines and most likely a review of ethical statutes. APAC falls behind when it comes to following an official code of overall ethical conduct. Of the 69% who have signed up to one, a quarter say they are not well-versed in the content. And close to 40% think there is a lack of consequences for agencies that fail to behave ethically. This is an issue to reckon with given that globally, most see balancing growth and ethics as a major challenge.

In 2025, APAC's PR industry should proceed with confidence and realism in equal measure. Opportunities for growth still abound in both fast developing and mature markets. For multinational agency networks and clients, key to progress will be recognizing that APAC is not in any way, shape or form a single homogenous market — and making the most of that diversity.

## Top 3 most commonly selected answers



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

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



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 areas do you expect an increase in PR firms' investment this year?

1. ESG
2. Strategic consulting
3. Measurement and analytics



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

1. Clients unwilling to commit sufficient funds
2. Inability to effectively measure impact of PR
3. Staff retention / Changes to the media business model



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

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



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

1. Motivating younger executives
2. Retaining key talent staff
3. Hiring mid-level staff



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

1. Mastery of AI tools
2. Strategic consulting
3. Measurement, evaluation and analytics
3. Research, Insight and planning



Which of the following social issues, if any, are your clients most likely to prioritise?

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



## BUILDING TRUST AND INNOVATION IN A CHANGING LANDSCAPE



**Iva Grigorova**

**DIRECTOR PR BUSINESS MSL,  
PUBLICIS GROUPE BULGARIA**

**PRESIDENT OF BAPRA 2024 - 2026**

**Economic and political instability in the region have significantly impacted the planning and allocation of communication budgets. Companies face difficulties in forecasting and often reduce their budgets as a precautionary measure. Inflation and global events, such as wars, further exacerbate these challenges, affecting overall marketing expenditures.**

Besides the budget constraints, there are different demographic issues and the need for regulatory improvements. Additionally, the vast disinformation and misinformation on variety of topics is raising questions about media dependency and building trust in society.

Consumer behavior continues to change, and audiences have become more cautious about what information they consume and where. There is a noticeable shift towards personalized communication strategies that aim to build emotional connections with consumers.

Companies are investing in new technologies and AI as well to stay competitive and meet evolving consumer demands due to the ongoing changing consumer behavior. Thus, communication professionals need to have in hand strategic planning, consultancy skills and innovation to navigate these challenges successfully and to maintain responsible corporate communication with purpose for their clients.

Influencer marketing plays a crucial role in personalized strategies, emphasizing the importance of quality content and long-term engagement. TikTok has emerged as a significant advertising platform in the region. This trend reflects a shift towards personalized communication and building emotional connections with consumers.

Technological advancements, particularly in AI and digital services, are expected to continue shaping the communication industry. Technology is widely used to enhance efficiency, facilitate work, and develop analysis or reports and creative products.

However, there are concerns about the need for human oversight and issues related to copyright and ethics. The influence of these technologies is projected to grow in Eastern Europe, with significant impacts expected in 2025.

**That creates a need for investment in skills for mastering AI tools that support the PR function and, therefore, focus on the advisory aspect of our profession. Regarding skills development in talent, it's crucial for PR agencies to retain senior staff and invest in programs for developing their skills to stay competitive and distinctive.**

# EASTERN EUROPE

## Top 3 most commonly selected answers



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

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



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

1. Technology
2. Consumer products
3. Healthcare



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

1. ESG
2. Multimedia
3. Influencers communications



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

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



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

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



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

1. Retaining key talent
2. Hiring senior staff
2. Hiring mid-level staff



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

1. Strategic consulting
2. Mastery of AI tools
3. Crisis counsel



Which of the following social issues, if any, are your clients most likely to prioritise?

1. Sustainability and climate change
2. Mental health
3. Technology empowerment





## LATAM MARKET SHOWS MODERATE OPTIMISM IN A CHALLENGING SCENARIO



**Ciro Dias Reis**

**FOUNDER & CEO IMAGEM CORPORATIVA  
EX-GLOBAL CHAIR OF PROI WORLDWIDE  
BOARD MEMBER OF PRCA LATAM  
AND ICCO**

**There is room for a certain level of optimism in the field of Latin American PR, but this varies from country to country and local conditions.**

Brazil is the largest economy in the region (GDP growth above 3% in 2024 and 2.5% expected in 2025) and the country where PR businesses are experiencing special dynamics. Mexico, the second largest Latin American economy, is expected to grow less than 2% in 2024. The new Mexican and American presidents in power in both countries raise a question mark regarding future economic relations between them.

Argentina, the third largest economy in the region, saw a new political group launching a recovery plan capable of reducing inflation (dramatic 211% in 2023) that also impacted all types of industries, leading to a reduction in GDP by around 3% in 2024.

PR fees in Latin America are traditionally lower than those in the Northern Hemisphere and competition has increased significantly in the region (many new small PR agencies and marcomms have started operations in the last 5 years and advertising agencies continue to be relevant competitors in some areas). Furthermore, a change to cost of operation in the region is not as affordable as in the US and Europe, which means that investing to grow the business is a permanent challenge for PR agencies.

Despite these challenges, a good number of PR firms in the region is adapting to a new scenario, where digital solutions, AI and other new technologies can improve competitiveness and profitability. Reputation, DEI and sustainability projects also represent an interesting path for new businesses in the region.

In large and mid-sized companies from different industries, reputation has been considered an important topic. But in smaller organizations C-Level involvement in this area is erratic, not adhering to a consistent standard.

Purpose has also been a keyword in the regional PR market. Slowly but surely, projects related to good working conditions, environmental issues, inclusion, governance and stakeholder relations are gaining traction.

In this non-traditional field of PR, competition between PR agencies and both law firms and consulting firms happens quite frequently.

Step by step, the best-structured PR firms in Latin America have managed to convince clients that they can provide more innovative services, thus neutralizing the negative effects of the commoditized prices of traditional PR services such as press relations.

On the other hand, many clients continue to prefer hiring a traditional advertising or consultancy company for given projects because they believe that a global and famous brand could guarantee the best results.

This adds another ingredient to the fight for talent: in order to advance and become and/or remain competitive in these new niches, PR firms need to find more qualified professionals, sometimes in different industries. Fluent English is not a common skill in the region as a whole, and personal economic and political “repertoire” (which favors more strategic approaches and solutions) is another permanent challenge.



## Top 3 most commonly selected answers



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

1. Marketing and communications
2. Purpose and CSR
3. Corporate reputation



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

1. Technology
2. Healthcare
3. Consumer products



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

1. Influencers communications
2. Measurement and Analytics
3. Social media community management



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

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



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

1. Balancing agency income / growth with considerations around ethical behaviour / clients
1. Complexity and scale of clients



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



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

1. Strategic consulting
1. Creativity
2. Mastery of AI tools
2. Media relations



Which of the following social issues, if any, are your clients most likely to prioritise?

1. Sustainability & climate change
2. Healthcare



## REGIONAL OVERVIEW: PR INDUSTRY PERFORMANCE & INSIGHTS



**Kate Midttun**

**CEO AND FOUNDER,  
ACORN STRATEGY**

**Our region continues to position itself as a global leader in several key areas of the public relations industry.**

This year, optimism remains high, with a strong belief that profitability will increase. This confidence reflects broader industry trends, where businesses are placing greater emphasis on corporate reputation and purpose. CEOs are recognising the long-term value of strategic communication, demonstrating an unprecedented commitment to PR as a core business function.

A standout trend is the significant investment in marketing compared to other communications disciplines.

Additionally, PR firms are being increasingly trusted to lead in non-traditional services, indicating an expanded role beyond traditional media relations. Interestingly, there's a perception that PR agencies aren't keeping up with the pace in supporting clients on their digital needs.

In terms of innovation, our region is adapting to new technologies at an appropriate pace. AI tools have been successfully integrated into PR practices, and digital adoption is leading the charge in shaping the industry's future. Moreover, talent sourcing has evolved, with firms actively recruiting professionals from outside the industry, bringing fresh perspectives and skills into the PR landscape.

Diversity and inclusion are also strong points, with our region setting an example by ensuring representation aligns with national demographics. Impressively, 100% of respondents reported having dedicated and trained D&I personnel, signaling that organisations are embedding inclusivity into their structures.

However, despite these strengths, the data presents some contradictions. While our region takes pride in its leadership in diversity, we simultaneously report the lowest global score in having concrete D&I policies in place. This suggests a gap between intent and implementation. While dedicated personnel exist, structured policies may need to be strengthened to create long-term, measurable impact.

Additionally, while PR professionals here believe they are less likely to be misled by fake news and claim to easily identify misinformation, the absence of formalised policies around ethical standards raises concerns. Only 20% of respondents perceive PR as more ethical than other industries, despite the fact that 90% believe their role includes advising clients against unethical behavior. This contradiction highlights a potential perception issue: while PR practitioners see themselves as ethical gatekeepers, the industry's reputation in this regard remains weak. Addressing this will require a more proactive stance on ethics, transparency, and accountability.

In summary, our region showcases clear leadership in profitability, corporate purpose, digital innovation, AI adoption, and diversity. However, there are notable areas for improvement. Strengthening formalised D&I policies, addressing ethical concerns, and reinforcing PR's role as a trusted and ethical advisory service will be key to maintaining our leadership and closing the gaps that still persist.



## Top 3 most commonly selected answers



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

1. Strategic consulting
2. Marketing communications
3. Influencer marketing



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

1. Technology
2. Food and beverage
3. Financial and professional services



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

1. Strategic consulting
2. Influencers communications
3. Multimedia contention creation



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

1. Economic conditions generally
2. Changes to the media business mode
3. Impact of geopolitical tensions



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

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



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

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



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

1. Mastery of AI tools
1. Crisis counsel
2. Strategic consulting



Which of the following social issues, if any, are your clients most likely to prioritise?

1. Sustainability and climate change
2. Education
2. Technology empowerment



## THE COSTS & BENEFITS OF EARLY ADOPTION



**AARON KWITTKEN**

CEO AND FOUNDER, PROPHET

**2024 brought new priorities, new technology, and old challenges to North America. Amidst a changing political climate and the increased adoption of new technologies, PR practitioners were asked to manage risk, navigate crises, operate ethically and appear authentic amidst a regulatory maze, human-appearing AI-generated content, and mis- and dis-information.**

### Growth Areas

Strategic consulting and corporate reputation overtook social media/community management and marketing communications as the top two areas for growth in 2024. Looking ahead, investments are expected to increase in strategic consulting and research, insights and planning. Crisis communications

stands to take the spotlight in 2025 and brands that employ AI tools to prepare for and navigate the storms that come will be the ones that make it out in one piece.

### Technology Adoption

North America is a technology leader, responsible for many of the world's leading platforms and tools. In this tech-forward environment, 100% of North American respondents reported using AI tools in everyday processes, the highest amongst all regions. Yet, when asked to rate the PR industry's adoption of new technology, North America scored a 5.4, in line with the global average but below the UK, Asia Pacific, Eastern Europe, and the Middle East. Individual practitioners are integrating LLMs and data-fed resources into their work faster than companies can guide proper use of these tools. Brands and PR firms need to take steps to ensure appropriate training, proper permissioning, data hygiene and compliance to lay the foundations for long-term success, internally and externally.

### Ethical Challenges

Mis- and dis-information remains the biggest ethical challenges for PR professionals and agencies in North America, followed by lack of consequences for agencies that do not behave ethically or work for unethical clients. Further, North

America scored the highest among regions when asked how difficult it is to differentiate between accurate information and fake news. The truth has never been able to get in the way of a good story, so it is up to all of us in the industry to act responsibly, call out unethical behavior and produce credible, trustworthy work.

### Talent Management

In 2023 and again in 2024, retaining key talent and developing junior and mid-level staff were the key challenges when it came to talent. This isn't North America-specific, globally, PR practitioners are struggling to retain key talent. Agencies that adopt AI tools and train junior staff how to use them will change the role of junior staff, offering a unique opportunity for more meaningful work. Staff that are being utilized to their highest potential will produce greater results at lower costs and be less likely to jump ship to agencies where they'd be set back in their career, tasked with more grunt work and less strategic thinking.

2025 is a turning point for PR in North America. We've taken the lead in adopting AI tools, but holding that lead will require flexibility and creativity. Brands and agencies willing to embrace new solutions for tired problems will set the industry standard.



## Top 3 most commonly selected answers



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

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



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

1. Technology
2. Consumer products
3. Healthcare



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

1. Strategic consulting
2. Research, insight and planning
3. Influencers communications



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

1. Political instability
2. Competition from other communications disciplines



Which 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 behaviour / clients



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. Crisis counsel
3. Mastery of AI tools



Which of the following social issues, if any, are your clients most likely to prioritise?

1. Mental health
2. Child welfare
2. Education





## LOOKING FORWARD, REALISTICALLY



**Sarah Scholefield**

PRCA PRESIDENT

**As we reach the end of 2024, the UK PR industry is in a sober mood but determined to create its own future. That's seen in a clear-sighted set of findings in the World Report.**

Take tech, the UK's fastest-growing sector. There's an avoidance of starry-eyed complacency by a PR industry that isn't yet satisfied with its own progress and that is making investment in digital and social capability one of its priorities.

Take corporate reputation: an area where the need for honesty, integrity and objectivity has been proven in the public eye and where PR has been performing strongly in recent years. A greater focus on measurement and evaluation has, and will continue to, earn dividends.

The election of a new government has meant a greater interest by clients in public affairs and an emphasis on providing political perspective and counsel, even at a time when the economy as a whole remains sluggish.

Take mental health: an issue that has become critical in recent years. UK firms have led the way in embedding formal mental health and wellbeing support – but that in some ways is the easy part. We should not be surprised that greater openness about mental health issues has led to more honesty about the issues being faced by too many colleagues. The challenge for PR leaders now is to stay the course.

**It's encouraging to see that PR agencies are taking seriously the challenge of making the industry better reflect the society from which it comes.**

The PRCA 2024 Census suggests that this is beginning to happen, but mainly, at this stage, at junior levels.

Mis- and disinformation remains an area of concern, but the industry is aware of its leadership position in combating those who seek to profit from lies. We have seen more sophisticated thinking emerge in recent months and a greater understanding of ways in which accurate information can be defended.

There is an expectation that 2025 will again be a year of financial pressures – for clients and agencies alike. This realism necessitates clear thinking. Already we have heard different agencies try new approaches to their business – from the way in which they find new work, to the adoption of new technology to deliver outcomes, to the way in which they prove their worth and charge for their services.

**Challenging times are calling for fresh thinking, and the UK PR sector is ready to create its future.**





## Top 3 most commonly selected answers



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

1. Corporate reputation
2. Strategic consulting
3. Investor relations / financial communications



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 areas do you expect an increase in PR firms' investment this year?

1. Strategic consulting
2. Digital build and production
3. Social media community management



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

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



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

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



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

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



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

1. Strategic consulting
2. Mastery of AI tools
3. Measurement, evaluation and analytics
3. Research, Insight and planning



Which of the following social issues, if any, are your clients most likely to prioritise?

1. Sustainability & climate change
2. Technology empowerment
3. Diversity and social inclusion



## MODERATE GROWTH EXPECTATIONS IN THE MONTHS TO COME WHILE NEW AGENCY MODELS ARE BEING DESIGNED



### MASSIMO MORICONI

ICCO REGIONAL PRESIDENT: EUROPE  
CEO OMNICOM PR GROUP ITALY

According to ICCO's World PR Report 2024-2025, Western Europe is a virtuous market but shows only cautious optimism for the months to come. The analysis highlights all the prudence of the old continent on growth opportunities - an area in which it shows moderate confidence with a score of 6.4 out of 10 behind Africa (7.9), Asia-Pacific (7.8) and North America (6.7) - and on expectations of an increase in business profitability, with an average score of 4.5 out of 10 which places it ahead only of the UK market. In fact, the performances recorded in the last 12 months by technology, healthcare and financial services sectors - the best segments for our industry in Europe - are not enough to mitigate concerns related to economy outlook and pressure from shareholders and investors on margins and business profitability.

With this background, PR & Comms agencies announce investments in services related to ESG communications, number one priority also stimulated by the European Union's green regulations, followed by strategic consultancy and relationships with influencers. An important signal that confirms the desire to accompany the continent's responsible business journey and to do so with quality standards and ethics, the latter being a key value for our industry on which professionals based in Europe record the highest score globally, with 45% of consensus.

Ethics also becomes crucial in the adoption and use of AI, a factor which for 79% of respondents already has a very significant/significant impact on our profession and which sees 75% of Western European agencies integrating it into their daily work, behind only those of North America and the Middle East.

Mastery of AI tools is then identified in Europe as the most important skill for the future of our discipline (next ten years) ahead of the ability to provide strategic consultancy and crisis communications. It will be interesting to see how AI will be put at the service of Corporate Reputation practice, an area that has grown the most on our continent in the last 12 months and which, thanks to exponential technologies, will face new opportunities and threats. One above all?

The management of dis-misinformation against brands, listed among the top 3 threats for our clients. ICCO has been active in this area for years and thanks to our Media Information and Education Pledge - an initiative which today counts on five partner organizations (Council of Europe, The Trust Project, GWPR, EACD, EUPRERA) - we want to keep sharing resources and tools used by different stakeholders of the information society for preventing and combating mis-disinformation.

In conclusion, the above-mentioned elements present a European PR industry which is put under pressure by external factors (geopolitics, wars, green transition, investors, exponential technologies) but which sees relevant opportunities ahead while figuring out its evolution through new services and business models. In the near future, we will witness the outputs coming from this tension including the evolution of our consultancy and the organizational design of our agencies - Leaner? Younger? Faster? Or maybe just Different - but we must make it happen on the solid basis of quality standards and by putting ethics at the core, not only with regard to the responsible use of AI but as a general principle that embraces every action we take, individually and as a collective.



## Top 3 most commonly selected answers



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

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



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 areas do you expect an increase in PR firms' investment this year?

1. ESG
2. Strategic consulting
3. Influencers communications



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

1. Economic conditions generally
2. Financial pressure to meet profit/margin targets
3. Digital and new technologies



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

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



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

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



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

1. Mastery of AI tools
2. Strategic consulting
3. Crisis counsel
3. Purpose and ESG



Which of the following social issues, if any, are your clients most likely to prioritise?

1. Sustainability and climate change
2. Diversity and social inclusion
3. Social media ethics

