

WORLD PR REPORT 2017

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RESEARCH PARTNER: ONEPOLL

ONEPOLL

Commercial Director: Asa Baaw
Research Manager: Louise Harper-King
Senior Researcher: Laura Bizley

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www.michaelmurphyand.com

Michael Murphy &
Telephone +44 7785 116018
michael@michaelmurphyand.com



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research | UK & International | questionnaire design | data visualisation

THESE ARE GREAT DAYS TO BE IN PR



FRANCIS INGHAM
CHIEF EXECUTIVE
ICCO

The ICCO World PR Report is the definitive analysis of the world PR and communications industry. Drawing on ICCO's 40 associations, operating in 55 countries, and representing 2,500 agencies, this publication is essential reading for anyone who wants to know where PR is now, and where it is going to be in the coming years.

What are the headline findings?

The big headline is surely this - PR is in great shape.

Agency heads are optimistic that the PR market is growing. And that is true in every single region of the world, with the highest levels of optimism to be found in Asia Pacific.

They also expect their agencies to be more profitable this year. And once again, this optimism is present in every region, with Latin American agency heads leading the pack.

Reflect on that for a moment: all around the world, agencies are growing and doing so with increasingly profitability. And that was the key finding last year as well. Ours is a great, dynamic industry, capable of growing in tricky economic circumstances as well as in benign ones. How many other industries can say that?

Beneath those big messages, what's driving growth?

We would identify four key reasons why PR is doing quite so well.

The first is that CEOs take corporate reputation increasingly seriously. Business leaders know that the reputation of their companies have direct effects on corporate performance (and, indeed, on their own careers). Accordingly, they are investing in reputation management.

Second, though less prevalent than in last year's report, marketing spend continues to move from other marketing disciplines and towards PR.

The third reason is that the trend of clients asking PR agencies for non-PR services shows no sign of abating.

The fourth and final driver identified by agency heads underpins all of this. PR agencies are providing excellent digital services, that meet the needs of the client community. In every region of the world, agency heads are confident in their digital offering. When Peter Chadlington spoke at the 2016 ICCO Global Summit in Oxford, he identified digital's utter centrality to our industry's future. He was absolutely correct to do so.

Turning to functions, it is clear to me that we have found a happy balance between the industry provides strategic counsel and media relations; where creativity is rewarded, and so is evaluation and research. Around the world, PR has addressed the challenges of marketing convergence, and has come out on top.

Amidst all of this good news, there are of course challenges.

Some challenges we can do little if anything general - the economic circumstances in which agencies operate for example.

Others, though, we can.

Agency heads cite keeping skills current in the digital field as their number one challenge. I think they're meeting that challenge. Agencies continue to invest strongly in digital skills, and as we see with digital driving the industry's growth, that investment is paying off.

The biggest challenge agency management faces is clearly talent. We are simply not good enough at attracting and retaining agency employees. This challenge is at every level, and in every region of our business. At its heart is money. We don't pay people enough. We don't pay well enough because we don't charge enough.

And why don't we charge enough? Because we invest insufficient time and resource in proving the impact of PR and communications. Evaluation lies at the heart of our industry's future, and while much progress has been made, there is more that needs to be done. We need to crack this problem once and for all. That is why our partnership with AMEC and its incomparable CEO Barry Leggetter is so important to us.

But... for all of the challenges our industry faces, let's be clear. Those challenges will all be met. The industry is large, vibrant, growing, and increasingly respected. These are great days to be in PR. And the days that lie ahead are brighter still.

**“AROUND THE
WORLD, PR HAS
ADDRESSED THE
CHALLENGES
OF MARKETING
CONVERGENCE,
AND HAS COME OUT
ON TOP”**

BULLISH ON GROWTH



NITIN MANTRI
BUSINESS PARTNER AND CEO
AVIAN MEDIA

The future of public relations in the Asia Pacific region is robust, with a majority of senior communicators bullish on growth. Over 80% per cent of agency heads are optimistic about the industry's growth, and, more than two thirds expect increase in profitability. These findings are important indicators of the excellent performance of the industry at a time when the region's economic growth has slowed, and, governments are under pressure to prove that they are performing, thus making them enact unpredictable policies.

Not only has the industry grown, PR has also earned its rightful place in the boardroom. A growing number of marketers are channelling spends away from other disciplines into PR. Clients, too, are asking PR firms to provide non-traditional services. Two factors drove this change – digitization and the subsequent need to protect corporate reputation.

“NOT ONLY HAS THE INDUSTRY GROWN, PR HAS ALSO EARNED ITS RIGHTFUL PLACE IN THE BOARDROOM”

While digital communications will dominate the industry's growth for years to come, public affairs will gain equal importance. Almost fifty percent of the respondents expect growth in their public affairs practice because brands cannot build a business in this region without an in-depth understanding of the politics, aggressive markets, socio-cultural fabric and nuances of the countries that constitute the Asia Pacific market.

This brings me to the dreaded question: Do we have the talent to meet the evolving needs of communications? The answer is still a resounding no. More than two thirds of respondents are not convinced. The industry has been trying to think differently about the problem and look for talent outside the PR bubble. But just over 20 per cent of consultancy heads believe that the industry is doing a good job of sourcing talent from outside. More than half of the respondents cited salary levels as the major obstacle in the way of hiring people from diverse backgrounds.

In conclusion, it has been a mixed-bag year. We have definitely matured as an industry. It is heartening to see firms using data/analytics and research to create insight-driven integrated campaigns. Some challenges like the talent crunch are being marginally addressed. The key to successful communications in this region lies in telling a compelling story that makes an emotional connection with audiences and builds lasting relationships - of course, using latest tools, gadgets and platforms that speak to them. And, all this needs to be done ethically and responsibly because if we don't earn the trust of our stakeholders we will never become true advisors to our clients.

OUR TIME TO LEAD



MICHELLE HUTTON
CHIEF OPERATING OFFICER
EDELMAN EUROPE

There continues to be a renewed optimism for the growth opportunities for our industry across Europe. But there is a growing divide between those agencies that are modernising their offer to meet changing client needs and external pressures, and those that are not. There is no denying that the agencies that are bringing in new specialist digital and creative skills at pace are out-growing those that are not.

There are several macro trends at play across Europe that are impacting the 2017 research results:

- Elections in the major hub markets;
- The unfolding implications of the UK's decision to leave the European Union;
- The increasing rejection of established authority and the breakdown of trust; and
- How companies are responding to the increasing pressure of building sustainable businesses with purpose.

Despite these headwinds the results reinforce that there is a very real desire for us to help clients navigate the complexity of change across Europe. Whether it be through the fast rise in C-suite advisory work or putting our new skills to work with marketers searching for agile, earned at the core ideas that grow and protect brands.

“THERE IS A VERY REAL DESIRE FOR US TO HELP CLIENTS NAVIGATE THE COMPLEXITY OF CHANGE ACROSS EUROPE”

Never before has the importance of local counsel been so important across the diverse markets in Europe. Clients are in need of local advice with the ability to scale for multi-market brand and reputation briefs.

Interestingly, the best creative ambition is coming from many of the smaller markets in our region. But we all need to modernise our core PR businesses at pace with new skills and capabilities whilst building relevant marketing offers at scale.

One of the biggest challenges agencies face across our region is how to build a diverse and inclusive team for the benefit of our clients. Clients are demanding it.

Research and measurement continues to be a critical fix. We know that more than ever clients need to assess in real time what is working and what is not and adjust plans accordingly.

But importantly, it is our time to lead and we should see profitable growth across our industry in Europe in the years to come.

2017 RANK	2016 RANK	AGENCY	HQ	FEE INCOME 2016 (\$)	FEE INCOME 2015 (\$)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
1	1	Edelman ¹	USA	874,968,000	854,576,000	5,849	2.4%	2.4%
2	2	Weber Shandwick ²	USA	825,000,000	775,000,000	-	6.5%	6.5%
3	3	FleishmanHillard ³	USA	570,000,000	570,000,000	-	0.0%	0.0%
4	4	Ketchum ⁴	USA	562,000,000	530,000,000	-	6.0%	6.0%
5	6	MSLGroup ⁵	France	485,000,000	480,000,000	3,133	1.0%	1.0%
6	5	Burson-Marsteller ⁶	USA	480,000,000	480,000,000	-	0.0%	0.0%
7	7	Hill+Knowlton Strategies ⁷	USA	395,000,000	385,000,000	-	2.6%	2.6%
8	8	Ogilvy PR ⁸	USA	361,000,000	347,000,000	-	4.0%	4.0%
9	9	BlueFocus ⁹	China	268,675,634	244,814,558	-	9.7%	17.2%
10	10	Golin ¹⁰	USA	245,000,000	227,000,000	-	7.9%	7.9%
11	12	Brunswick	UK	240,000,000	220,000,000	-	9.1%	9.1%
12	13	Cohn & Wolfe ¹¹	USA	224,000,000	200,000,000	-	12.0%	12.0%
13	11	Havas PR ¹²	France	220,000,000	213,000,000	-	3.3%	3.3%
14	14	FTI Consulting	USA	191,184,000	189,974,000	599	0.6%	4.5%
15	15	MC Group ¹³	Germany	185,209,500	162,317,350	996	14.1%	18.5%
16	22	W2O Group ¹⁴	USA	122,715,000	95,010,000	427	29.2%	29.2%
17	16	Porter Novelli	USA	122,000,000	127,000,000	-	-3.9%	-3.9%
18	17	APCO Worldwide	USA	120,622,100	119,858,300	672	0.6%	0.6%
19	19	Sunny Side Up Inc	Japan	116,500,000	104,000,000	159	12.0%	12.0%
20	18	Huntsworth Health ¹⁵	UK	111,684,000	107,004,000	-	4.4%	25.6%
21	20	Finsbury	USA	108,000,000	100,000,000	238	8.0%	8.0%
22	25	Vector Inc.	Japan	106,000,000	82,000,000	515	29.3%	29.3%
23	21	WE Communications	USA	101,784,000	98,782,000	583	3.0%	3.0%
24	24	inVentiv Health ¹⁶	USA	90,000,000	85,000,000	-	5.9%	5.9%
25	32	Res Publica (National PR)	Canada	78,000,000	60,000,000	558	30.0%	30.0%
26	28	Finn Partners ¹⁷	USA	76,706,000	71,481,000	485	7.3%	7.3%
27	34	FSB Comunicacoes	Brazil	76,338,478	52,511,005	659	45.4%	17.2%
28	27	Ruder Finn, Inc.	USA	67,400,000	74,000,000	556	-8.9%	-8.9%
29	23	Grayling	UK	66,297,000	93,536,000	-	-29.1%	-14.7%
30	31	Text 100 ¹⁸	USA	65,964,887	62,647,894	610	5.3%	5.3%
31	29	PMK*BNC	USA	65,000,000	69,800,000	312	-6.9%	-6.9%
32	43	Zeno Group*	USA	59,080,694	47,343,821	406	24.8%	24.8%
33	35	MWWPR	USA	58,000,000	60,000,000	200	-3.3%	-3.3%
34	36	Hopscotch ¹⁹	France	57,960,000	58,424,000	533	-0.8%	3.0%
35	30	Lewis PR ²⁰	UK	57,000,000	68,585,000	370	-16.9%	-16.9%
36	37	ICR	USA	55,663,450	56,208,727	158	-1.0%	-1.0%
37	39	Allison+Partners	USA	55,000,000	49,000,000	338	12.2%	12.2%
38	46	Marina Maher Communications	USA	52,000,000	43,000,000	165	20.9%	20.9%
39	38	fischerAppelt	Germany	51,555,000	46,212,730	427	11.6%	15.8%
40	33	Bell Pottinger Private	UK	49,200,000	60,872,400	-	-19.2%	-2.7%
41	61	Newgate Communications	UK	48,608,857	29,827,400	171	63.0%	63.0%
42	48	Hering Schuppener	Germany	47,040,000	36,624,000	189	28.4%	33.3%
43	44	DKC Public Relations	USA	47,000,000	46,950,000	240	0.1%	0.1%
44	45	Dentsu Public Relations Inc.	Japan	44,600,000	43,000,000	260	3.7%	3.7%
45	41	Kreab	UK/Sweden	42,466,200	48,611,820	400	-12.6%	-9.3%
46	51	Padilla	USA	42,444,913	43,265,495	206	-1.9%	-1.9%
47	40	Instinctif Partners	UK	42,208,680	49,316,560	386	-14.4%	3.0%
48	42	Freud Communications	UK	41,143,500	48,228,760	238	-14.7%	2.6%
49	47	PRAP Japan, Inc.	Japan	41,000,000	41,000,000	289	0.0%	0.0%
50		Grupo Inpress	Brazil	39,856,031	28,752,906	516	38.6%	11.8%

TABLE NOTES

- 2015 acquisitions included Dabo&Co, Smithfield and Position
- Weber Shandwick's 2014 fee income has been revised downward to take into account the removal of certain agencies (such as DeVries), along with currency fluctuation in 2014. The 2015 fee income includes several subsidiary firms such as Powell Tate, Current Marketing and Creation
- Includes fee income for several subsidiary firms, such as Vox, BlueCurrent and Fishburn
- Includes fee income for AccessEmanate and other subsidiary firms
- Includes fee income for all network firms, including Kekst, CNC, JKLL, Winner, PBJ.S, Qovis.
- 2015 acquisitions included South Africa's Epic Communications
- Includes fee income from PS+B and other subsidiary firms
- Includes fee income from Group SJR, Public Strategies Inc and other subsidiary firms. 2015 acquisitions included Ideal in Brazil
- Includes fee income from Ogilvy Healthworld and other subsidiary firms
- Includes fee income from Citizen Relations and other subsidiary PR firms
- Includes fee income from Virgo Health, Fuse, Carvas Blue, Magic Group and other subsidiary firms. 2016 acquisitions included Brooklyn Brothers.
- Acquired India's Six Degrees in 2015
- Includes fee income from Abernathy MacGregor, Red Agency, Havas Formula and other network PR firms p/k/a Media Consulta
- Includes fee income from WCG, Twist and other subsidiary firms
- Includes fee income from Tonic Life and other Huntsworth Health firms
- Includes fee income from Chandler Chicco, Biosector 2 and other subsidiary firms
- Acquisitions include Horn Group, DVL and Selgenenthaler

2017 RANK	2016 RANK	AGENCY	HQ	FEE INCOME 2016 (\$)	FEE INCOME 2015 (\$)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
51	52	Four Communications Group ²¹	UK	39,822,192	34,473,387	332	15.5%	39.0%
52	55	GCI Health	USA	38,800,000	32,000,000	-	21.3%	21.3%
53	53	Teneo Blue Rubicon	UK	37,000,000	34,000,000	-	8.8%	8.8%
53	49	DeVries Global	USA	37,000,000	37,000,000	205	0.0%	0.0%
55		Kyodo Public Relations	Japan	36,230,091	32,268,380	223	12.3%	12.3%
56	50	Portland Communications	UK	35,670,000	37,000,000	210	-3.6%	16.0%
57	54	Llorente & Cuenca ²²	Spain	35,484,750	32,739,240	496	8.4%	12.5%
58	57	Global Strategy Group	USA	34,000,000	31,000,000	95	9.7%	9.7%
59		H&H Group ²³	Sweden	33,770,000	27,240,000	-	24.0%	35.2%
60	62	Prain Global	Korea	32,853,248	28,537,969	220	15.1%	15.1%
61	73	Hotwire ²⁴	UK	31,702,340	23,397,226	216	35.5%	35.5%
62	58	The Outcast Agency	USA	31,500,000	30,000,000	-	5.0%	5.0%
63	70	Prosek Partners	USA	31,488,000	24,400,000	127	29.0%	29.0%
64	60	Racepoint Global	USA	29,036,374	29,247,346	168	-0.7%	-0.7%
65	67	M Booth	USA	28,844,191	25,546,472	150	12.9%	12.9%
66	65	Coyne PR	USA	27,300,000	25,000,000	159	9.2%	9.2%
67	59	Citigate Dewe Rogerson	UK	27,183,000	29,600,000	-	-8.2%	10.5%
68	76	5W Public Relations	USA	27,002,754	21,927,960	138	23.1%	23.1%
69	69	Oliver Schrott Kommunikation	Germany	26,365,500	24,514,100	213	7.6%	11.6%
70	94	Carmichael Lynch Relate ²⁵	USA	25,500,000	17,500,000	-	45.7%	45.7%
72	81	Fahlgren Mortine	USA	24,440,092	20,554,236	194	18.9%	18.9%
73	86	Adfactors PR ²⁶	India	24,300,000	19,600,000	575	24.0%	24.0%
74	68	G&S Business Communications	USA	24,228,411	25,012,724	135	-3.1%	-3.1%
75	79	Olson Engage	USA	24,000,000	21,000,000	128	14.3%	14.3%
76	66	MHP Communications	UK	23,789,554	24,489,880	147	-2.9%	16.9%
77	82	Hunter Public Relations	USA	23,500,000	20,500,000	121	14.6%	14.6%
78	78	French/West/Vaughan	USA	23,371,021	21,166,208	103	10.4%	10.4%
79	66	Iris Worldwide	UK	23,370,000	28,120,000	-	-16.9%	0.0%
80	91	Farner Consulting	Switzerland	23,215,500	17,598,050	-	31.9%	36.9%
81	74	Taylor	USA	22,900,000	22,100,000	110	3.6%	3.6%
82	77	Strategic Public Relations Group	Hong Kong	22,300,000	21,800,000	302	2.3%	2.3%
83		Sopexa	France	22,149,750	25,338,140	214	-12.6%	-9.3%
84	90	Jackson Spalding	USA	21,006,046	18,172,800	131	15.6%	15.6%
71	64	SEC Group ²⁷	Italy	25,273,231	27,260,900	188	-7.3%	-7.3%
85	80	Peppercomm	USA	20,427,321	20,644,468	101	-1.1%	-1.1%
86	75	Geelmuyden.Kiese Group	Norway	20,160,000	18,480,000	-	9.1%	0.0%
87	107	Spectrum	USA	20,000,000	14,840,000	72	34.8%	34.8%
88	95	Kivvit	USA	19,882,634	17,010,000	66	16.9%	16.9%
89	83	Shift Communications Inc.	USA	19,621,186	20,426,167	126	-3.9%	-3.9%
90	87	Levick Strategic Communications	USA	19,000,000	19,586,431	73	-3.0%	-3.0%
91		Exposure	UK	18,750,033	20,306,235	168	-7.7%	11.1%
92	92	ATREVIA	Spain	18,674,278	18,065,286	253	3.4%	7.3%
93	89	Serviceplan PR Group	Germany	18,186,000	18,224,800	120	-0.2%	3.6%
94	137	CYTS-LINKAGE	China	18,123,494	10,075,000	150	79.9%	79.9%
95	109	M&C Saatchi Sport & Entertainment	UK	17,466,000	14,800,000	123	18.0%	42.0%
96	93	LaunchSquad	USA	17,409,000	16,221,000	119	7.3%	7.3%
97		Havas Formula	USA	17,030,177	14,356,222	95	18.6%	18.6%
98	84	Barabino & Partners	Italy	16,905,000	16,568,000	102	2.0%	5.9%
99	106	PR One	Korea	16,800,000	14,946,921	135	12.4%	12.4%
100	98	Mitchell Communications Group, LLC	USA	16,657,093	14,190,491	76	17.4%	17.4%

TABLE NOTES

- Includes fee income from Incredible and Republic Publishing
- Includes fee income from heaven, Sagamatha, Human to Human, Upro and other subsidiary firms.
- 2016 acquisitions included 33% of Sopexa
- Includes fee income from acquisitions of Purestone, DMG, Platon and PageOne
- Includes fee income from acquisitions of Francis Balsam and Broadgate Mainland
- 2015 acquisitions included EDF Communications and S/A Comunicao
- Includes fee income from Hallvarsson & Halvarsson, Springtime, Jung and other subsidiary firms.
- 2016 acquisitions included Eastwick.
- p/k/a Spong
- Acquired Yorke Communications in 2015
- Includes fee income from Cambre and other subsidiary firms. 2016 acquisitions included Newington.

2017 RANK	2016 RANK	AGENCY	HQ	FEE INCOME 2016 (\$)	FEE INCOME 2015 (\$)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
101	88	The Red Consultancy	UK	16,359,000	18,988,103	140	-13.8%	3.7%
102	112	Faktor 3	Germany	16,065,000	13,625,000	180	17.9%	22.4%
103	101	achtung!	Germany	15,666,000	15,337,390	146	2.1%	6.0%
104	115	PAN Communications	USA	15,605,837	13,150,000	87	18.7%	18.7%
105	111	Cooney/Waters Group	USA	15,160,000	14,020,725	46	8.1%	8.1%
106		Imre	USA	15,100,000	14,600,000	85	3.4%	3.4%
107	102	TRACCS	Saudi Arabia	15,050,000	15,200,000	218	-1.0%	-1.0%
108	104	Spark	USA	15,000,000	14,007,456	55	7.1%	0.1%
109	99	ICF Mostra	Belgium	14,592,900	15,760,533	141	-7.4%	-3.9%
110	96	Brands2Life	UK	14,387,925	17,110,280	104	-15.9%	1.2%
111	110	Haberlein & Mauerer	Germany	14,385,000	14,606,000	166	-1.5%	2.2%
112	108	Interel	UK	14,175,000	14,715,000	120	-3.7%	0.0%
113		Enviroics Communications	Canada	14,076,868	12,055,011	92	16.8%	13.6%
114	132	Highwire	USA	14,032,125	10,994,175	73	27.6%	27.6%
115	139	ReviveHealth	USA	14,015,000	10,030,000	65	39.7%	39.7%
116		Rud Pedersen	Sweden	13,985,000	11,118,000	67	25.6%	30.4%
117	97	Lansons	UK	13,887,551	16,196,377	115	-14.3%	3.2%
118	113	Hanover	UK	13,788,300	13,648,692	100	1.0%	21.6%
119	124	InkHouse	USA	13,738,722	12,110,173	98	13.4%	13.4%
120	116	Kaplow	USA	13,700,000	13,100,000	69	4.6%	4.6%
121	119	Sloane & Company	USA	13,500,000	13,000,000	19	3.8%	3.8%
122	105	Maitland	UK	13,451,280	14,206,520	53	-5.3%	13.9%
123		Mazarine Asia Pacific	Hong Kong	13,200,000	12,754,000	61	3.5%	3.5%
124	114	Makovsky	USA	13,141,000	13,450,000	56	-2.3%	-2.3%
125	127	Exponent	USA	12,600,000	11,800,000	54	6.8%	6.8%
126	133	ROI Communication	USA	12,500,000	12,500,000	80	0.0%	0.0%
126	120	RF Binder	USA	12,500,000	12,700,000	68	-1.6%	-1.6%
126		TogoRun	USA	12,500,000	14,300,000	65	-12.6%	-12.6%
129	123	Bite Communications	USA	12,250,000	12,250,000	-	0.0%	0.0%
130	138	Crosby	USA	12,243,385	10,055,190	68	21.8%	21.8%
131		Current Marketing	USA	12,012,000	10,500,000	55	14.4%	14.4%
132	121	Brodeur Partners	USA	12,000,000	12,500,000	-	-4.0%	-4.0%
133	130	Merritt Group, Inc.	USA	11,805,900	11,119,100	58	6.2%	6.2%
134	117	Pegasus	UK	11,767,410	13,120,200	108	-10.3%	7.9%
135	126	Max Borges Agency	USA	11,500,000	11,842,541	65	-2.9%	-2.9%
136	135	M&C Saatchi PR	UK	11,386,035	10,583,481	118	7.6%	29.4%
137	141	The Hoffman Agency	USA	11,340,000	10,300,000	140	10.1%	10.1%
138	133	A&B One	Germany	11,235,000	10,943,600	75	2.7%	6.6%
139	129	Davies	USA	11,083,799	11,310,000	32	-2.0%	-2.0%
140	100	Rasky Partners	USA	11,043,237	14,126,431	44	-21.8%	-21.8%
141	144	Kwittken	USA	11,000,000	10,000,000	70	10.0%	10.0%
142	131	F&H Porter Novelli	Germany	10,710,000	11,052,600	65	-3.1%	0.6%
143	125	Action Global Communications	Cyprus	10,700,000	12,500,000	291	-14.4%	-14.4%
144	143	Wellcom	France	10,500,000	9,810,000	100	7.0%	11.1%
145	157	Bateman Group	USA	10,482,117	8,643,281	53	21.3%	21.3%
146	148	Lift World	Portugal	10,354,761	9,550,268	120	8.4%	12.6%
147	167	North Strategic	Canada	10,212,000	8,136,000	78	25.5%	22.1%
148	145	Method Communication	USA	10,141,885	9,734,260	59	4.2%	4.2%
149	122	TVC Group	UK	10,087,638	12,560,121	16	-19.7%	-3.4%
150	155	SenateSHJ	New Zealand	10,058,000	9,352,000	58	7.5%	7.5%

2017 RANK	2016 RANK	AGENCY	HQ	FEE INCOME 2016 (\$)	FEE INCOME 2015 (\$)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
151	150	Podesta Group	USA	10,030,212	9,020,909	19	11.2%	11.2%
152		DCI	USA	10,023,512	9,600,000	57	4.4%	4.4%
153	152	KPR & Associates	Korea	9,916,073	8,700,000	100	14.0%	14.0%
154		PRR	USA	9,782,849	9,081,986	96	7.7%	7.7%
155	128	Nelson Bostock Group	UK	9,471,000	11,642,294	88	-18.7%	-2.1%
156	149	Bliss Integrated Communications	USA	9,284,000	9,500,000	48	-2.3%	-2.3%
157	163	rbb Communications	USA	9,241,425	7,605,889	58	21.5%	21.5%
158	193	Praytell	USA	9,211,710	5,900,000	56	56.1%	56.1%
159	147	Powerscourt	UK	8,856,000	10,212,000	37	-13.3%	4.3%
160		furrerhugi.	Switzerland	8,800,995	9,115,864	38	-3.5%	0.2%
161	177	Nebo	USA	8,500,000	8,600,000	74	-1.2%	-1.2%
162	153	Apple Tree Communications	Spain	8,400,000	8,692,750	72	-3.4%	0.3%
163	136	Veritas Communications	Canada	8,362,000	7,272,000	65	15.0%	11.9%
164		HSE Cake	UK	8,241,000	8,806,000	65	-6.4%	12.6%
165	234	Gregory FCA	USA	8,200,000	7,500,000	66	9.3%	9.3%
166	168	LVT Group	Netherlands	8,169,000	7,722,650	75	5.8%	9.8%
167	158	First House	Norway	8,085,000	9,047,000	22	-10.6%	-7.2%
168	164	360PR+	USA	8,026,000	7,500,000	45	7.0%	7.0%
169	175	Walker Sands	USA	8,018,798	6,917,494	79	15.9%	15.9%
170	182	C+C	USA	8,002,057	6,488,879	45	23.3%	23.3%
171	159	FoodMinds	USA	8,000,000	8,287,756		-3.5%	-3.5%
172	161	Approach	Brazil	7,878,020	8,132,838	146	-3.1%	-3.1%
173	177	McNeely Pigott & Fox Public Relations	USA	7,845,354	6,806,534	62	15.3%	15.3%
174	103	Frank PR	UK	7,782,832	9,993,864	55	-22.1%	-6.3%
175		JPA Health Communications	USA	7,703,679	6,056,952	39	27.2%	27.2%
176	160	Jeschenko MedienAgentur	Germany	7,612,500	8,185,900	44	-7.0%	-3.5%
177	146	AMI Communications	Czech Republic	7,610,175	9,643,422	100	-21.1%	-18.1%
178	162	Dodge Communication	USA	7,578,042	7,750,000	42	-2.2%	-2.2%
179	188	Marco de Comunicacion	Spain	7,535,156	6,105,679	90	23.4%	28.1%
180	171	Lambert, Edwards & Associates	USA	7,481,000	7,058,000	39	6.0%	6.0%
181		Greentarget Global Group LLC	USA	7,447,000	6,835,000	33	9.0%	9.0%
182	154	JeffreyGroup	USA	7,213,840	8,580,997	122	-15.9%	-15.9%
183	173	Lou Hammond & Associates	USA	7,210,839	6,966,039	40	3.5%	3.5%
184	191	W ²⁸	UK	7,170,900	6,009,633	91	19.3%	43.6%
185	237	Rumeur Publique	France	7,100,100	5,952,490	48	19.3%	23.8%
186		GOODIDEA MEDIA	China	7,000,000	5,000,000	45	40.0%	40.0%
186	174	451 Marketing	USA	7,000,000	7,000,000		0.0%	0.0%
186	166	Enzaim Health	Korea	7,000,000	7,265,750	57	-3.7%	-3.7%
189	151	Octopus Group	UK	6,888,000	7,067,000	66	-2.5%	17.3%
190	169	Thomas Marko & Associes	France	6,825,000	7,085,000	36	-3.7%	0.0%
191	184	Fink & Fuchs Public Relations	Germany	6,741,000	6,431,000	54	4.8%	8.8%
192	183	komm.passion	Germany	6,615,000	6,485,500		2.0%	5.9%
193	179	Narva ²⁹	Sweden	6,600,000	6,480,000	41	1.9%	11.1%
194	180	LDWWgroup	USA	6,599,007	6,596,363	16	0.0%	0.0%
195	176	Cicero Group	UK	6,531,028	6,910,389	54	-5.5%	13.7%
196		Saxum	USA	6,460,846	5,976,694	34	8.1%	8.1%
197	156	Mischief	UK	6,424,290	7,143,960	70	-10.1%	8.2%
198	185	Kirchhoff Consult	Germany	6,422,000	6,322,000	58	1.6%	1.6%
199	203	EMG	The Netherlands	6,300,000	5,450,000	47	15.6%	20.0%
199	181	All Channels	Bulgaria	6,300,000	6,540,000	91	-3.7%	0.0%

TABLE NOTES

28. 2016 acquisitions included House PR
29. Acquisitions include Heart, Rewrite, Mix and Medial

2017 RANK	2016 RANK	AGENCY	HQ	FEE INCOME 2016 (\$)	FEE INCOME 2015 (\$)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
201		Public Integrated Communications	USA	6,260,124	6,312,563	45	-0.8%	7.4%
202	189	Djembe Communications	UAE	6,200,000	6,000,000	47	3.3%	3.3%
203	207	Another Company	Mexico	6,100,000	5,200,000	91	17.3%	17.3%
204	192	Cerrell Associates	USA	6,098,177	5,950,000	25	2.5%	2.5%
205		Day One Agency	USA	6,038,323	4,390,259	33	37.5%	37.5%
206	195	Creative Crest	India	6,024,391	5,859,050	42	2.8%	2.8%
207		Kyne	Ireland	5,900,761	4,592,165	26	28.5%	28.5%
208	170	Diplomat Communications	Sweden	5,800,000	4,900,000	38	18.4%	18.4%
209	194	Headland Consultancy	UK	5,792,868	5,539,347	40	4.6%	25.8%
210		Kiterocket	USA	5,788,068	4,222,082	45	37.1%	37.1%
211		Tunheim	USA	5,757,017	5,120,195	29	12.4%	12.4%
212		Moore Communications Group	USA	5,737,878	6,542,410	38	-12.3%	-12.3%
213	214	Hope&Glory	UK	5,710,719	5,032,209	58	13.5%	36.5%
214	220	Konnect Public Relations	USA	5,700,000	4,750,000	36	20.0%	20.0%
215		Eulogy!	UK	5,467,921	5,749,347	51	-4.9%	14.4%
216		Story Partners	USA	5,442,608	4,800,000	20	13.4%	23.0%
217	221	Singer Associates	USA	5,364,538	4,736,816	16	13.3%	13.3%
218	204	Trigger Oslo	Norway	5,250,000	5,406,400	45	-2.9%	0.8%
219	201	Berkeley PR International	UK	5,231,190	5,544,654	55	-5.7%	13.5%
220	196	Seven Hills	UK	5,216,011	5,854,917	46	-10.9%	7.2%
221		Evercom	Spain	5,207,922	3,967,781	62	31.3%	36.3%
222	187	salt	UK	5,157,588	6,101,695	45	-15.5%	1.7%
223	205	Dukas Public Relations	USA	5,148,601	5,300,000	21	-2.9%	-2.9%
224	172	The Herd Agency ³⁰	Australia	5,148,000	5,110,000	48	0.7%	2.1%
225	208	London Communications Agency	UK	5,126,930	5,228,908	34	-2.0%	18.0%
226	219	Integral PR Services Pvt Limited	India	5,100,000	4,805,000	78	6.1%	6.1%
227		Red Agency	Australia	5,048,706	3,635,850	65	38.9%	40.8%
228	225	DT Digital	China	5,000,000	4,500,000	-	11.1%	11.1%
228	212	Magna Carta	South Africa	5,000,000	5,000,000	-	0.0%	0.0%
228	210	BOCA Communications	USA	5,000,000	5,126,405	35	-2.5%	-2.5%
231	190	Harvard	UK	4,981,591	4,650,133	44	7.1%	28.9%
232	199	MCG Medical Consulting Group	Germany	4,924,500	5,548,100	34	-11.2%	-7.9%
233	202	circle	UK	4,861,018	5,506,569	39	-11.7%	6.2%
234	211	CP/partner	Germany	4,840,500	5,014,000	58	-3.5%	0.2%
235	245	NJF	USA	4,816,600	3,840,000	48	25.4%	25.4%
236		Remarkable Group	UK	4,792,080	5,308,760	41	-9.7%	8.6%
237	165	Shine@Academy ³¹	UK	4,778,220	4,339,492	44	10.1%	32.5%
238	198	CooperKatz & Company, Inc.	USA	4,748,633	5,581,445	29	-14.9%	-14.9%
239	197	Talk PR	UK	4,714,236	5,624,000	50	-16.2%	0.9%
240	229	Meropa Communications	South Africa	4,690,000	3,480,000	80	34.8%	15.5%
241	238	Hawkins International Public Relations	USA	4,566,288	4,000,000	31	14.2%	14.2%
242	226	L C Williams & Associates	USA	4,506,037	4,450,000	-	1.3%	1.3%
243		Greenough Brand Storytellers	USA	4,501,166	4,036,949	25	11.5%	11.5%
244	233	akkanto sa	Belgium	4,494,000	4,159,763	27	8.0%	12.2%
245	200	Havas Just: ³²	UK	4,428,000	5,550,000	30	-20.2%	-4.0%
246	242	Tact Intelligence-conseil	Canada	4,413,093	3,765,709	50	17.2%	14.0%
247	213	Bhava Communications	USA	4,400,000	5,000,000	27	-12.0%	-12.0%
248		Rose Marketing	Cyprus	4,396,072	4,087,653	57	7.5%	11.6%
249	223	Imagem Corporativa	Brazil	4,378,597	4,609,299	82	-5.0%	-5.0%
250	232	Akima Media	Germany	4,356,430	4,249,000	34	2.5%	2.5%

TABLE NOTES

30. Includes N2N Communications and Fuel Communications
31. Fee income reflects merger of UK firms Shine Communications and The Academy

LOOKING TO THE FUTURE



MARCELO DIEGO
CEO
MÁQUINA COHN & WOLFE

Latin America is experiencing a period of political and economic transition, whose outcome is uncertain. Changes in command of Brazil and Argentina, collapse of political system in Venezuela and troubled succession process in Chile are a visible face of this moment. In the economy, the prolonged recession in Brazil paralyzed the region's largest economy and negatively affected its neighbours.

This environment causes unpredictability and generalized retraction. In theory, therefore, it directly affects the PR market. However, this is not the extract from the research carried out with the leaders of this segment in the region. About 76.5% of the answers show a high degree of optimism with the perspectives of growth and expansion in the future.

“PR AGENCIES ARE GOING THROUGH A UNIQUE MOMENT, TO BE AT THE FOREFRONT OF THE TRANSFORMATION OF A MARKET ITSELF”

The apparent dichotomy is the best example of this segment's feelings. PR agencies are going through a unique moment, to be at the forefront of the transformation of a market itself. The decline in advertising and paid media goes along with an appreciation of earned media, shared stories between brands and audiences and owned narratives – the proprietary content of a brand. PR agencies still offer and transact media relations on a large scale, but increasingly position themselves as innovation hubs and storytellers for diverse platforms, drawing the attention of CMOs and entering new fields of opportunity and budgets.

Not surprisingly, if today 53% of demands are still related to media relations, leaders predict that in the near future deliveries will be concentrated in disciplines such as social media community management (64.71%) and multimedia content creation (also 64.71%).

Latin America looks to the future of the market itself. With the economic outlook better for the region, the bet is to resume the power of consumption of the middle class in its main markets and new consumer bases for foreign products.

This will generate new demands for PR. Agencies will have to deliver a complete experience to their clients, combining more and more technological resources, either in data qualification (data science and artificial intelligence), targeted ads and campaigns on social media or in content production (using AI, virtual reality, chatbots, among others). At the same time, such habitual characteristics of our region will continue to be worshiped, especially personal relationships and creativity.

Being prepared, with qualified teams, with technological infrastructure, competitive values and consistent delivery, will separate those who are only optimists from those who will lead sustainable growth.



DRIVING DEVELOPMENT



SHARON PIEHL
MANAGING DIRECTOR & PARTNER
FLEISHMANHILLARD SOUTH AFRICA

Africa's PR landscape remains robust and competitive, even in the face of widespread political and economic uncertainty, anaemic GDP growth of 2.2% in the last year, and muted forecasts overall for the continent.

However, this tumultuous and challenging environment has provided an opportunity for agencies operating on the continent to grow by learning how to adapt at speed, identifying gaps in the market and making investments into areas that require enhanced capabilities in order to drive development at all levels.

The 2017 research, for instance, reflects three broadly interlinked trends that have been contributing to this growth and which we expect to continue seeing impact the industry: reputation capital, technology and innovation driven by the Fourth Industrial Revolution, and talent.

With a fiercely competitive business and consumer landscape marked by rapid change and the unique new breed of African entrepreneurs and small business owners disrupting traditional ways of doing business, CEOs across Africa are increasingly seeing the importance of reputation capital and how it serves as a commodity driving shared value, in terms of contributing to business success and simultaneously helping to grow the communities that businesses operate in.

This year's research reinforced technology's capacity to help effectively tell brand stories and make a tangible business impact – and all indicators are that digital innovation will continue to play a critical role in allowing businesses to be better informed and manage their reputation and associated issues or crises in a more streamlined manner.

Technology and innovation will also carry on facilitating broader economic growth across the continent by unlocking more seamless business processes and ways to add value in a way that impacts all people.

What these constant advancements mean is that agencies are having to make the move from serving as traditional PR firms to integrated communications agencies – and the data shows this is an industry-wide trend where we are already seeing the shift but which will only gain prominence. In this way then, building the agency of the future will require building a talent pool from diverse backgrounds, including data scientists, business analysts and creatives, all while continuing to maintain the fundamental media relations function of the industry.

“AGENCIES ARE HAVING TO MAKE THE MOVE FROM SERVING AS TRADITIONAL PR FIRMS TO INTEGRATED COMMUNICATIONS AGENCIES”

Smart agencies recognise that the industry is moving away from measuring column centimetres to providing a tangible business impact that resonates at the boardroom table. In Africa, which is a continent as diverse as each of its 54 countries, building positive reputation capital for any brand will require a communications partner that understands the business, and the political and cultural nuances of these markets.

GLOBAL RESULTS

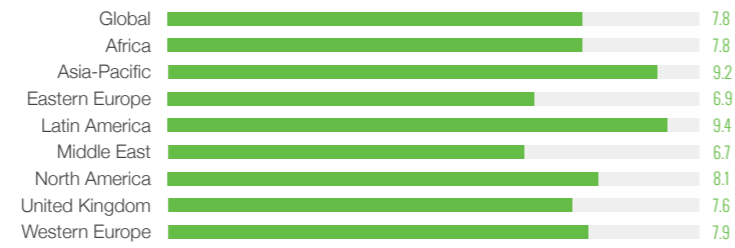
This study was conducted by OnePoll between July 3rd and August 24th 2017, with a sample of 459 international PR employees in 63 countries.

onepoll.

OUT OF 10

OPTIMISM

I am optimistic about the growth of the public relations market



PROFITABILITY

I expect an increase in agency profitability this year



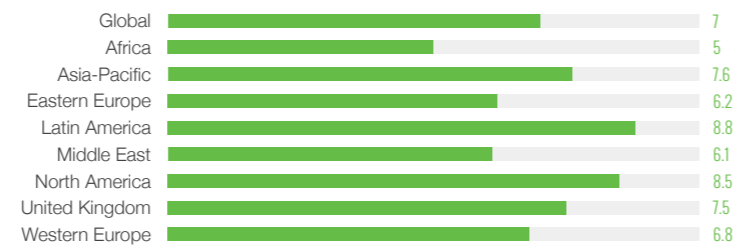
CORPORATE REPUTATION

Corporate CEOs in this market take corporate reputation seriously



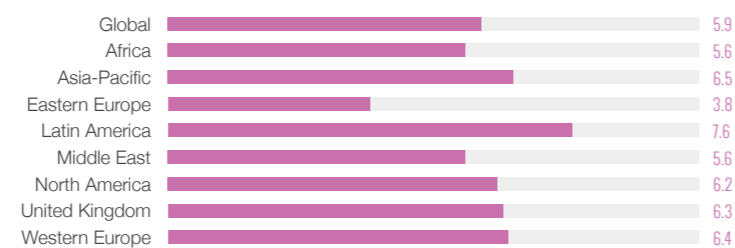
SOCIAL RESPONSIBILITY

Companies in this market are paying more attention to corporate social responsibility



OUTSOURCING

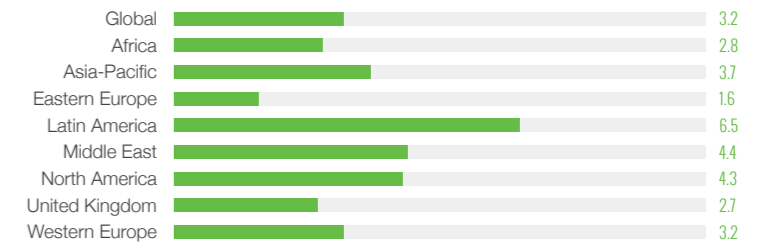
Companies in this market understand the need to balance shareholder interests with those of other stakeholders



OUT OF 10

MARKETING SPEND

Marketers in this market are spending more money on public relations relative to other marketing disciplines



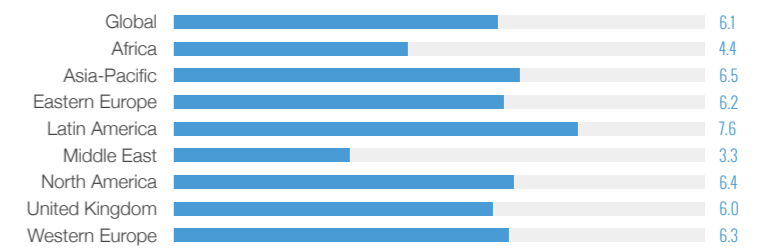
NON-TRADITIONAL SERVICES

Clients in this market are willing to turn to public relations firms to provide non-traditional services such as corporate advertising, digital or online communications, word-of-mouth



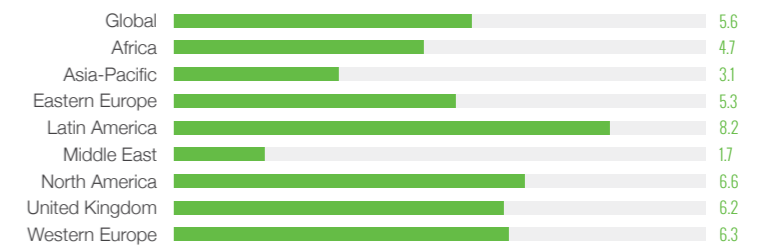
CLIENT'S DIGITAL NEEDS

PR agencies in this market are successfully addressing client digital needs



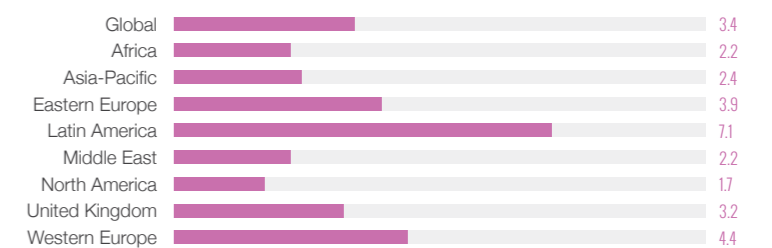
TALENT

There is a plentiful supply of intelligent, well-educated talent in this market



OUTSOURCING

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



% OF RESPONDENTS

IN WHICH OF THE FOLLOWING FUNCTIONS DID YOU SEE MOST GROWTH LAST YEAR?

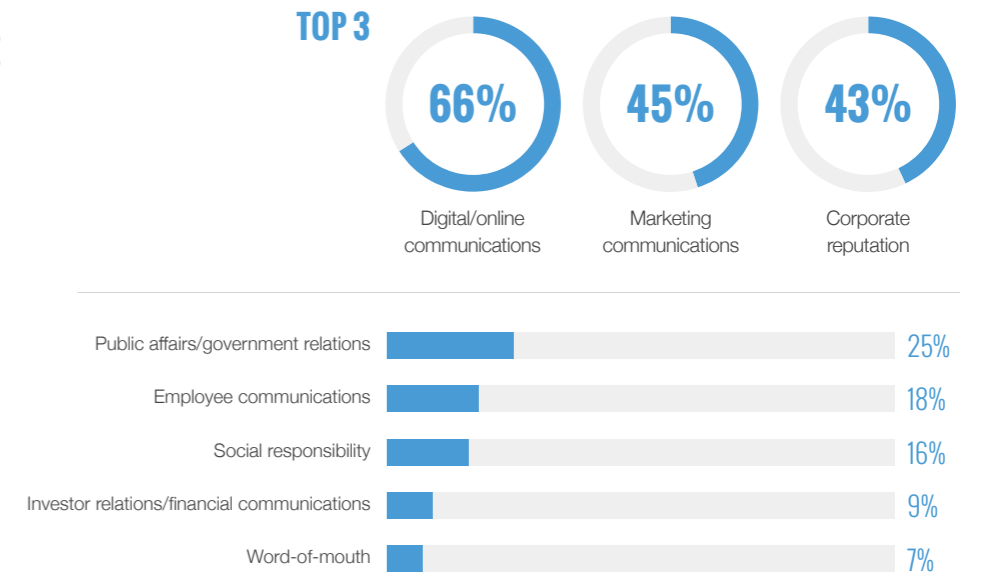


IN WHICH OF THE FOLLOWING AREAS DO YOU EXPECT THE MOST INCREASE IN PR FIRMS' INVESTMENT THIS YEAR?

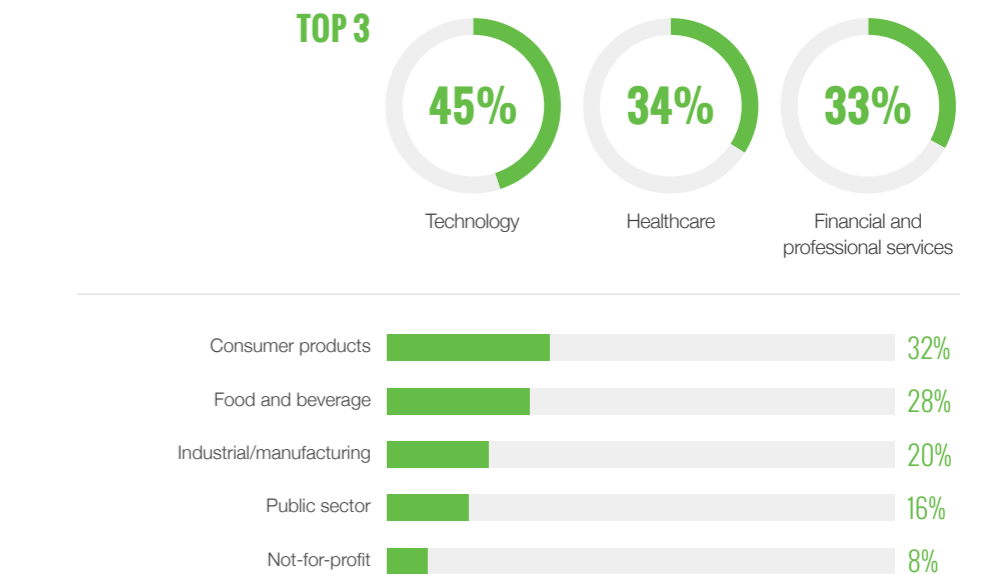


% OF RESPONDENTS

IN WHICH OF THE FOLLOWING PRACTICE AREAS DID YOU SEE MOST GROWTH LAST YEAR?

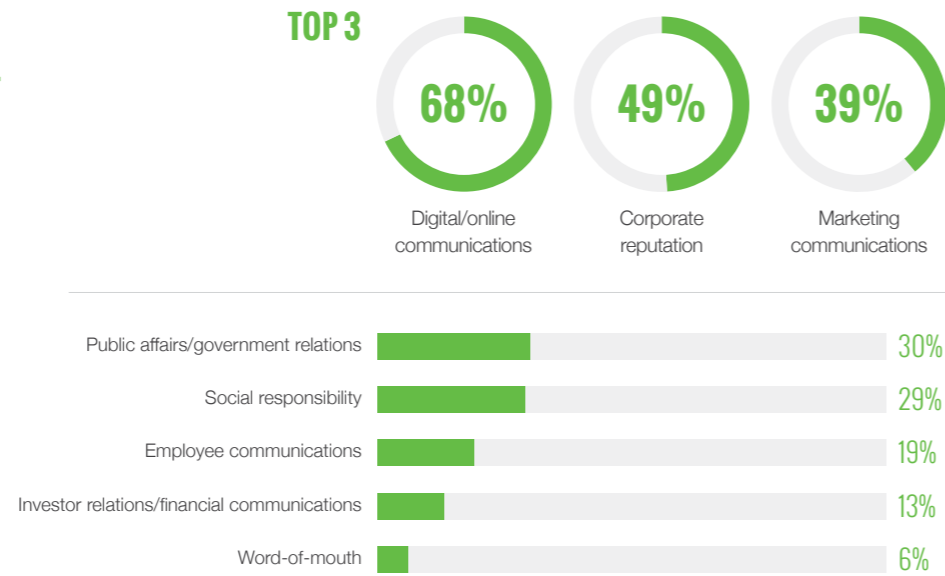


IN WHICH OF THE FOLLOWING SECTORS DID YOU SEE MOST GROWTH LAST YEAR?

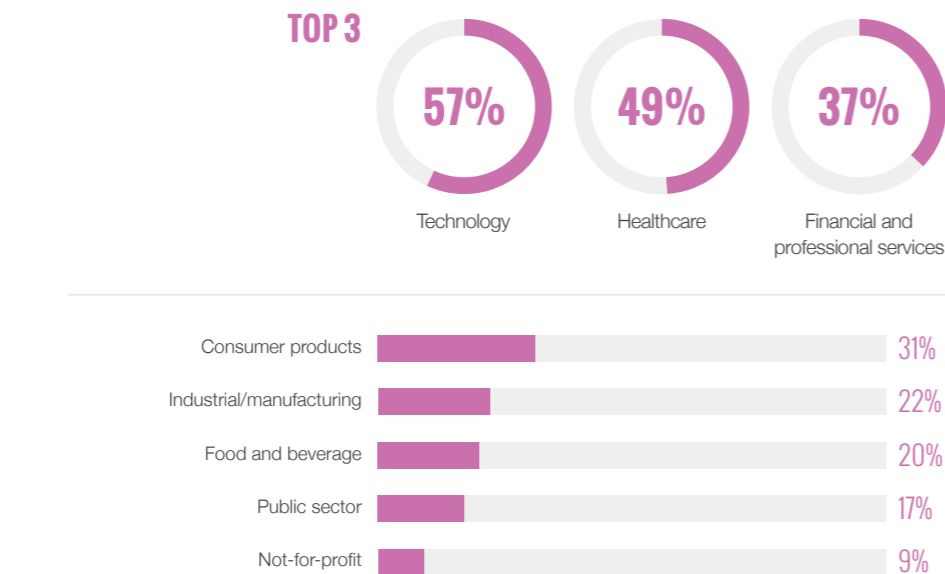


% OF RESPONDENTS

IN WHICH OF THE FOLLOWING AREAS DO YOU EXPECT TO SEE MOST GROWTH OVER THE NEXT FEW YEARS?

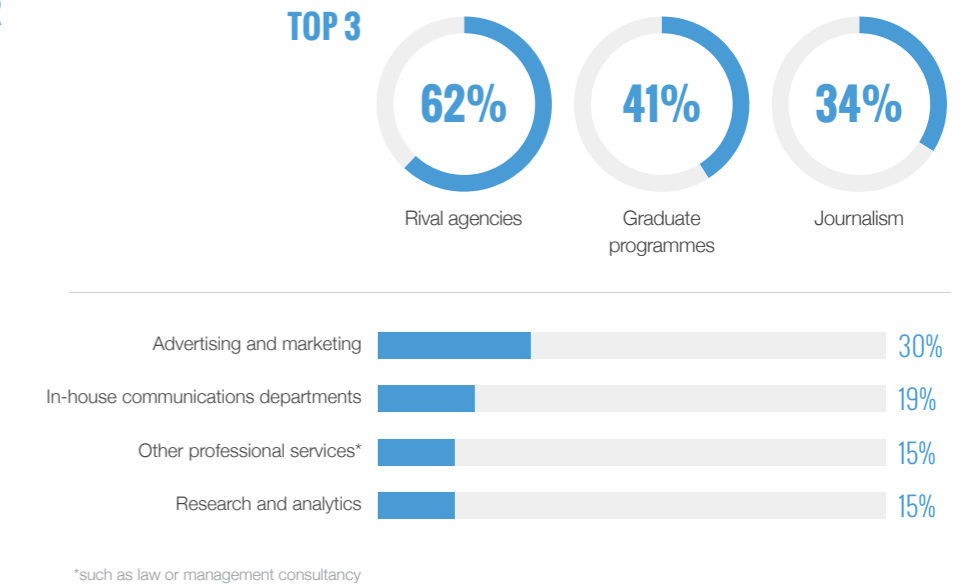


IN WHICH OF THE FOLLOWING SECTORS DO YOU EXPECT TO SEE MOST GROWTH OVER THE NEXT FEW YEARS?

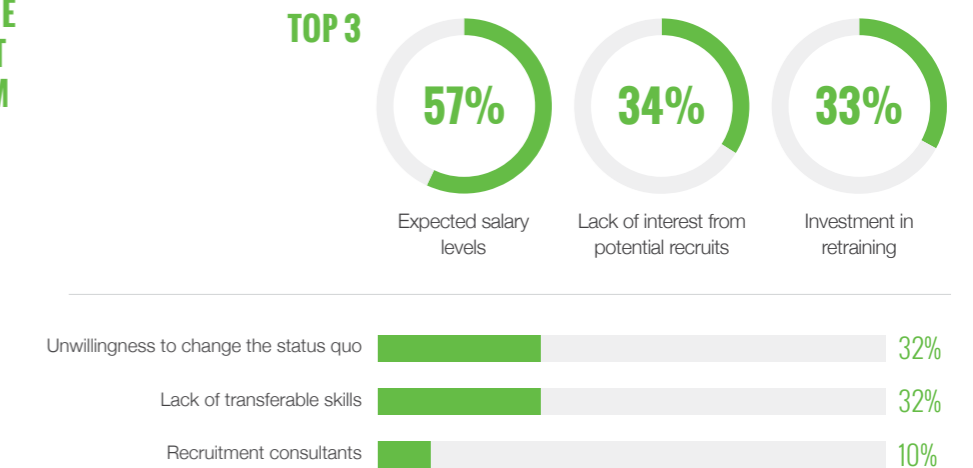


% OF RESPONDENTS

WHERE ARE AGENCIES IN YOUR MARKET MOST LIKELY TO SOURCE TALENT FROM THIS YEAR?



WHAT DO YOU THINK STOPS THE PR INDUSTRY IN YOUR MARKET FROM SOURCING TALENT FROM OUTSIDE THE INDUSTRY?



% OF RESPONDENTS

WHAT ARE THE BIGGEST CHALLENGES PR AGENCIES IN YOUR MARKET FACE WHEN IT COMES TO THEIR TALENT STRATEGY?



LOOKING AT THE NEXT DECADE, WHICH SKILLS SET DO YOU THINK WILL BE MOST RELEVANT FOR PR EXECUTIVES IN YOUR MARKET?



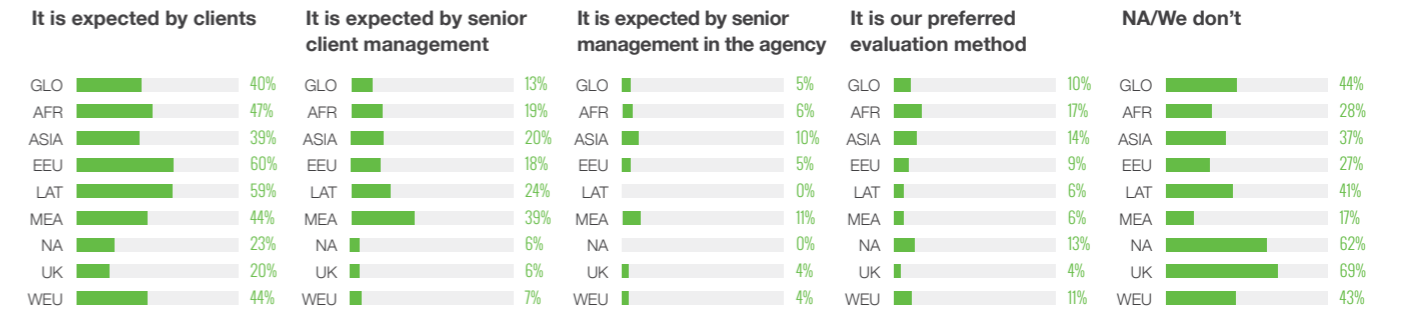
WHICH OF THE FOLLOWING ISSUES YOU BELIEVE TO BE THE GREATEST CHALLENGES FOR THE PR FIRMS IN YOUR MARKET?



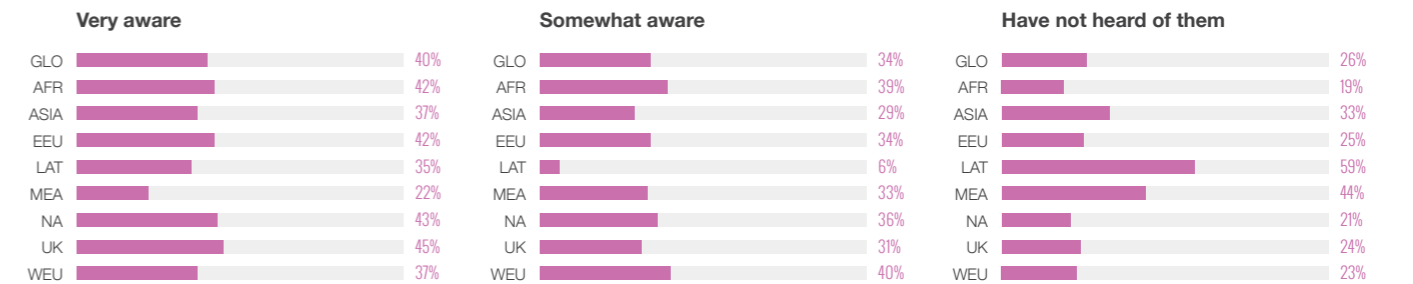
GLO - Global
 AFR - Africa
 ASIA - Asia-Pacific
 EEU - Eastern Europe
 LAT - Latin America
 MEA - Middle East
 NA - North America
 UK - United Kingdom
 WEU - Western Europe

% OF RESPONDENTS

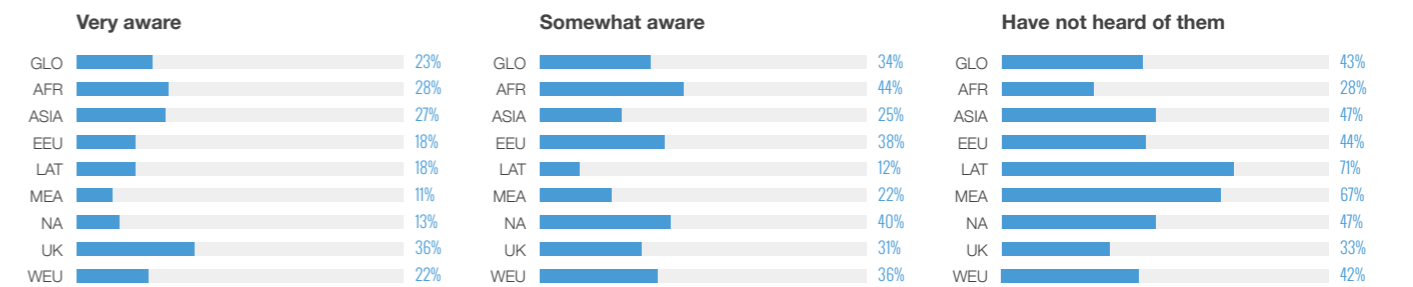
WHY DO YOU USE ADVERTISING VALUE EQUIVALENTS (AVE)?



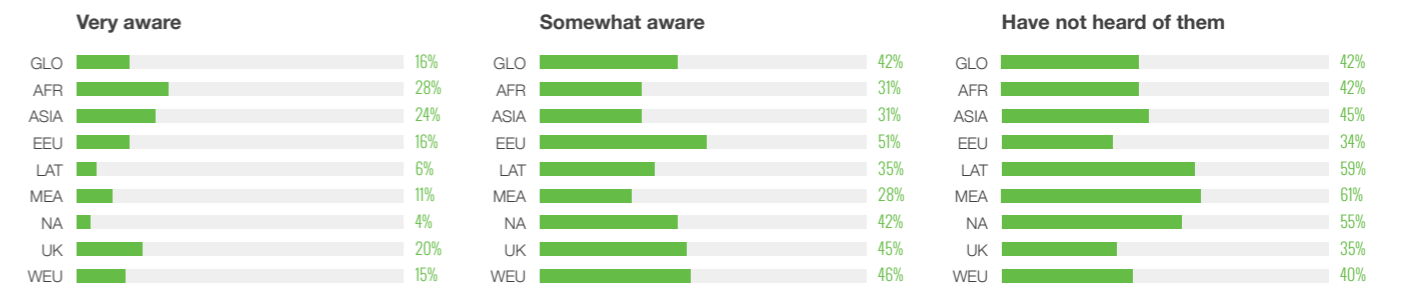
HOW AWARE ARE YOU OF THE BARCELONA PRINCIPLES?



HOW AWARE ARE YOU OF THE AMEC INTEGRATED EVALUATION FRAMEWORK?



HOW AWARE ARE YOU OF THE AMEC/ICCO PR PROFESSIONAL'S DEFINITIVE GUIDE TO MEASUREMENT?



REGIONAL RESULTS

AFRICA
ASIA-PACIFIC
EASTERN EUROPE
LATIN AMERICA
MIDDLE EAST
NORTH AMERICA
UNITED KINGDOM
WESTERN EUROPE

TOP 3 CHOICES PER REGION

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

1. Social media community management
2. Media relations
3. Multimedia content creation/ Senior counsel

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

1. Social media community management
2. Digital build and production
3. Multimedia content creation

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

1. Economic conditions generally
2. Staff retention
3. Digital and new technologies/ Staff recruitment

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

1. Digital/online communications
2. Corporate reputation
3. Marketing communications

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

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

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

1. Digital/online communications
2. Corporate reputation
3. Marketing communications

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

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

Where are agencies in your market most likely to source talent from this year?

1. Rival agencies
2. Graduate programmes
3. Journalism

What do you think stops the PR industry in your market from sourcing talent from outside the industry?

1. Expected salary levels
2. Investment in retraining
3. Lack of interest from potential recruits/ Unwillingness to change the status quo

What are the biggest challenges PR agencies in your market face when it comes to their talent strategy?

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

Looking at the next decade, which skills sets do you think will be most relevant for PR executives in your market?

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

TOP 3 CHOICES PER REGION

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

1. Social media community management
2. Multimedia content creation
3. Digital build and production/ Marketing communications

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

1. Social media community management
2. Digital build and production
3. Multimedia content creation

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

1. Staff retention
2. Staff recruitment
3. Lack of client understanding of PR

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

1. Digital/online communications
2. Corporate reputation
3. Public affairs/government relations

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

1. Technology
2. Healthcare
3. Consumer products

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

1. Digital/online communications
2. Public affairs/government relations
3. Corporate reputation

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

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

Where are agencies in your market most likely to source talent from this year?

1. Rival agencies
2. Graduate programmes
3. Advertising and marketing/ Journalism

What do you think stops the PR industry in your market from sourcing talent from outside the industry?

1. Expected salary levels
2. Lack of interest from potential recruits
3. Lack of transferable skills

What are the biggest challenges PR agencies in your market face when it comes to their talent strategy?

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

Looking at the next decade, which skills sets do you think will be most relevant for PR executives in your market?

1. Social media community management
2. Insight and planning
3. Measurement and analytics

TOP 3 CHOICES PER REGION

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

1. Social media community management
2. Multimedia content creation
3. Digital build and production

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

1. Social media community management
2. Multimedia content creation
3. Digital build and production

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

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

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

1. Digital/online communications
2. Marketing communications
3. Corporate reputation

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

1. Technology
2. Consumer products/ Food and beverage/ Financial and professional services
3. Healthcare

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

1. Digital/online communications
2. Corporate reputation
3. Marketing communications

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

1. Technology
2. Healthcare
3. Consumer products

Where are agencies in your market most likely to source talent from this year?

1. Journalism
2. Graduate programmes
3. Rival agencies

What do you think stops the PR industry in your market from sourcing talent from outside the industry?

1. Expected salary levels
2. Lack of interest from potential recruits
3. Investment in retraining

What are the biggest challenges PR agencies in your market face when it comes to their talent strategy?

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

Looking at the next decade, which skills sets do you think will be most relevant for PR executives in your market?

1. Social media community management
2. Creativity
3. Multimedia content creation

TOP 3 CHOICES PER REGION

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

1. Social media community management/ Media relations
2. Multimedia content creation
3. Digital build and production/ Insight and planning

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

1. Multimedia content creation/ Social media community management
2. Digital build and production
3. Measurement and analytics

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

1. Economic conditions generally
2. Financial pressure to meet profit/margin targets
3. Competition from other professional service firms/ Digital and new technologies/ Clients too focused on short-term

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

1. Digital/online communications
2. Marketing communications
3. Corporate reputation

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

1. Technology
2. Healthcare
3. Food and beverage/ Consumer products/ Financial and professional services

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

1. Digital/online communications
2. Corporate reputation
3. Marketing communications

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

1. Technology
2. Consumer products
3. Healthcare

Where are agencies in your market most likely to source talent from this year?

1. Rival agencies/ Journalism
2. Other agencies
3. Advertising and marketing

What do you think stops the PR industry in your market from sourcing talent from outside the industry?

1. Expected salary levels
2. Lack of transferable skills
3. Investment in retraining

What are the biggest challenges PR agencies in your market face when it comes to their talent strategy?

1. Training/developing junior and mid-level staff
2. Retaining key talent
3. Motivating younger executives/ Hiring mid-level staff/ Finding people from non-traditional backgrounds/ Incentivising younger staff

Looking at the next decade, which skills sets do you think will be most relevant for PR executives in your market?

1. Multimedia content creation
2. Social media community management
3. Digital build and production

TOP 3 CHOICES PER REGION

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

1. Social media community management
2. Multimedia content creation
3. Digital build and production

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

1. Multimedia content creation/ Digital build and production
2. Measurement and analytics
3. Social media community management

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

1. Economic conditions generally
2. Clients unwilling to commit sufficient funds
3. Financial pressure to meet profit/margin targets/ Lack of client understanding of PR/ Clients too focused on short-term

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

1. Digital/online communications
2. Marketing communications
3. Corporate reputation/ Investor relations/financial communications/ Employee communications

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

1. Consumer products
2. Financial and professional services
3. Public sector

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

1. Digital/online communications
2. Marketing communications
3. Corporate reputation

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

1. Consumer products
2. Financial and professional services/ Food and beverage
3. Investor relations/financial communications

Where are agencies in your market most likely to source talent from this year?

1. Rival agencies
2. Journalism
3. Advertising and marketing

What do you think stops the PR industry in your market from sourcing talent from outside the industry?

1. Expected salary levels
2. Lack of interest from potential recruits
3. Investment in retraining

What are the biggest challenges PR agencies in your market face when it comes to their talent strategy?

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

Looking at the next decade, which skills sets do you think will be most relevant for PR executives in your market?

1. Social media community management
2. Multimedia content creation
3. Creativity/ Digital build and production

TOP 3 CHOICES PER REGION

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

1. Multimedia content creation
2. Social media community management
3. Digital build and production

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

1. Measurement and analytics
2. Multimedia content creation
3. Digital build and production

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

1. Staff recruitment/ Clients unwilling to commit sufficient funds
2. Digital and new technologies
3. Staff retention/ Competition from other marketing disciplines/ Financial pressure to meet profit/margin targets

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

1. Digital/online communications
2. Marketing communications
3. Corporate reputation

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

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

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

1. Digital/online communications
2. Corporate reputation
3. Marketing communications

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

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

Where are agencies in your market most likely to source talent from this year?

1. Rival agencies
2. Advertising and marketing
3. Graduate programmes

What do you think stops the PR industry in your market from sourcing talent from outside the industry?

1. Expected salary levels
2. Lack of interest from potential recruits
3. Unwillingness to change the status quo

What are the biggest challenges PR agencies in your market face when it comes to their talent strategy?

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

Looking at the next decade, which skills sets do you think will be most relevant for PR executives in your market?

1. Measurement and analytics
2. Insight and planning
3. Multimedia content creation

TOP 3 CHOICES PER REGION

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

1. Social media community management
2. Multimedia content creation
3. Senior counsel

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

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

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

1. Staff recruitment
2. Staff retention
3. Digital and new technologies

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

1. Digital/online communications
2. Marketing communications
3. Corporate reputation

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

1. Technology
2. Financial and professional services
3. Industrial/manufacturing

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

1. Digital/online communications
2. Marketing communications
3. Corporate reputation

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

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

Where are agencies in your market most likely to source talent from this year?

1. Rival agencies
2. Graduate programmes
3. Advertising and marketing

What do you think stops the PR industry in your market from sourcing talent from outside the industry?

1. Expected salary levels
2. Unwillingness to change the status quo
3. Lack of interest from potential recruits

What are the biggest challenges PR agencies in your market face when it comes to their talent strategy?

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

Looking at the next decade, which skills sets do you think will be most relevant for PR executives in your market?

1. Measurement and analytics
2. Insight and planning
3. Multimedia content creation

TOP 3 CHOICES PER REGION

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

1. Social media community management
2. Multimedia content creation
3. Senior counsel/ Digital build and production

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

1. Social media community management
2. Multimedia content creation
3. Digital build and production

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

1. Digital and new technologies
2. Competition from other marketing disciplines
3. Lack of client understanding of PR

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

1. Digital/online communications
2. Corporate reputation
3. Marketing communications

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

1. Technology
2. Consumer products
3. Healthcare

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

1. Digital/online communications
2. Corporate reputation
3. Social responsibility

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

1. Healthcare
2. Technology
3. Consumer products

Where are agencies in your market most likely to source talent from this year?

1. Rival agencies
2. Graduate programmes
3. Journalism

What do you think stops the PR industry in your market from sourcing talent from outside the industry?

1. Expected salary levels
2. Lack of transferable skills
3. Unwillingness to change the status quo

What are the biggest challenges PR agencies in your market face when it comes to their talent strategy?

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

Looking at the next decade, which skills sets do you think will be most relevant for PR executives in your market?

1. Social media community management
2. Measurement and analytics
3. Digital build and production



NEW OPPORTUNITIES



SAADA HAMMAD
REGIONAL DIRECTOR - MENA
MEMAC OGIILVY PUBLIC RELATIONS

It's no secret the MENA market is wading in uncertainty. But opportunity beckons for agencies with operating models that can deal with today's volatile market conditions while preparing for tomorrow's needs and requirements.

As agencies become more integrated, the breakdown of silos is creating new opportunities for influence, and growing the role of public relations in the marketing mix.

“AS AGENCIES BECOME MORE INTEGRATED, THE BREAKDOWN OF SILOS IS CREATING NEW OPPORTUNITIES FOR INFLUENCE”

This year's report highlights the growth of PR in the overall marketing mix, with 27.7% of those surveyed strongly agreeing that companies are relying more heavily on PR than other marketing areas. PR spending not only continues to grow, but PR professionals are increasingly being turned to for traditionally non-PR services. Clients are looking beyond silos and asking for fully integrated, multimedia storytelling for their brands – regardless of practice area.

Also clear in this year's report is the impact that the digital, social, and mobile transformation is having on our client engagements. With the rise of digital technologies, the C-suite is more actively involved than ever in public relations, bringing intense focus to strategic communications, while applying a more analytical approach to measurement.

These two trends are dramatically altering the way the industry must approach and grow talent. We need to be cultivating strategic communicators while also building an army of specialists, including community managers, designers, content specialists, digital strategists, and data analysts.

Versatile digital talent is fast becoming the driver for brand engagement, and the many paths for talent development are being explored even as the business grows. A rising talent in video creation may not be thinking about a life in an agency, and social talent may not be looking for a traditional 9-5 role. Traditional agencies need to test the waters, reach-out beyond our comfort zones, and find new and creative ways to find, retain, and maximize the talent available in the market.

At the same time, there is a continuing role for what have been considered the agency “generalist”. Brand consultants, whether marketing agency or management consultancy, are the big picture thinkers that our clients need, and are evermore critical to the agency model – keeping hold of the communications drumbeat and bringing conceptual, commercial, and visionary ideas to life.

Weaving these strategists and specialists together with a clear purpose and common goal will be the next challenge for any PR and marketing organization. At Ogilvy, we have this year launched our own Next Chapter, dissolving our individual disciplines into One Ogilvy that can offer a truly integrated brand service capable of sustaining the right specialization within a network of brand professionals.

Each agency will need to make its own choices and investments, but one thing is clear – The future belongs to the agency that is poised to deliver in the now, the next, and the future.

RAPIDLY EVOLVING



HEATHER KERNAHAN
PRESIDENT
HOTWIRE NORTH AMERICA

Rapidly evolving are two words that can be used to describe the state of the PR industry in North America in 2017. This is because we are operating in a very different world to even twelve-months ago. Political change, investor activism, societal attitudes and the wider economy are all combining to shape the way corporations approach public relations.

It's no coincidence therefore that the industry seems in good health, with 62% of North American respondents to the 2017 ICCO World PR Report feeling optimistic about their growth prospects. However, it's not just growth that indicates a robust market environment. The sentiment around the importance of public relations has strengthened against a backdrop of increased complexity for companies, government and non-profits and a move away from traditional advertising.

**“THE SENTIMENT
AROUND THE
IMPORTANCE OF
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HAS STRENGTHENED
AGAINST A
BACKDROP OF
INCREASED
COMPLEXITY”**

This is due in no small way to the rise of fake news, amateur reporting and speed of the news cycle. Knowing when to communicate, sign a petition, align with other industry leaders, and when to communicate about topics such as diversity issues and government policy have become business critical decisions. Consequently, more and more CEOs and CMOs are turning to PR firms for advice. The ICCO World Report highlights this with a majority of respondents agreeing that CEOs in North America are taking corporate reputation seriously.

With all these factors threatening corporate reputations, the need for sector specialist advice will grow through 2017. The rise of micro influencers means that companies must understand their audiences more than ever before if they want to find success. These influencers move markets, shape reputations and ultimately affect revenue and they may be hard to find unless you're deep into the industry conversation.

However, the evolution extends beyond the provision of corporate reputation services. Today, the industry is going through a much-needed rebrand as firms drop the term PR in favour of communications, integrated communications or brand. With questions being asked about the veracity of online advertising and the ongoing debate around programmatic campaigns, the door has opened for agencies to provide a wider range of services.

All of this combined means that the coming twelve months will see the pace of evolution accelerate across the North American PR industry. We expect to see a rise in the quality of creativity from across the sector; an increase in investment in non-traditional PR areas such as insights and analytics; and a continued shift to integrated communications services. Clients will have greater choice but will face a largely homogenous agency landscape. To take full advantage of the growth and to realize the optimism showed in the ICCO World Report, we all must look carefully at our business models and be unafraid to reimagine what the PR playbook should look like.

EMBRACING CHANGE



RICHARD MILLAR
CEO, UK
HILL+KNOWLTON STRATEGIES

Despite uneasiness in the market, the latest ICCO World PR Report suggests this was another strong year for our industry in the UK. Certainly in my business we have observed double-digit growth, driven by purpose-led communications programmes, the creation of compelling content and an understanding of the science of human behaviour. Clients continue to turn to us for innovative solutions to their business problems; looking to leverage our unique understanding of all their stakeholders, as well as new channels and content formats.

But while Brexit may not be biting yet, it seems it is nipping at the heels of our collective subconscious. On the whole we are more cautiously optimistic about the future of our industry. We see increasing challenges to our budgets and to talent retention. Against this backdrop there is one phrase which sticks out to me in this year's survey:

Unwillingness to challenge the status quo

45% of those surveyed cite this as the reason we don't hire non-traditional staff – talent from advertising, marketing, research firms and beyond. In truth it speaks to a larger reticence to change, particularly during turbulent economic times. But to continue the growth we have seen over the past decade will require a willingness not only to think, but also act, differently.

This is why three years ago we began a journey of transforming H+K London into the Global Centre of Creative Strategy for our network. Our approach is always in beta, innovating and experimenting, putting insight, creativity and clients at the heart of everything we do. By embracing change, we better equip ourselves for the challenges we and our clients face now and in the future.

**“BY EMBRACING
CHANGE, WE
BETTER EQUIP
OURSELVES FOR THE
CHALLENGES”**

As an industry we need to push harder for ideas which start with a deep understanding of the audience and how to genuinely drive behavioural change. Starting with insights side steps the age-old debate around who owns which channel. Rather we can focus on developing creative platforms which we can prove will resonate, and use research to determine where, when and how we publish content. This shift propels us into C-suite conversations and removes those silos which limit our impact.

The larger economic issues, including Brexit and global financial market instability will remain challenges in the mid-term. But if we recognise disruption and embrace change, and if we can attract new skills from across content, marketing and insight disciplines, the next decade promises to be as exciting and rewarding as this one.

FINDING A PASSION FOR PR



ASA BAAW
COMMERCIAL DIRECTOR
ONEPOLL

The phrase “I fell into PR” is one I keep hearing when I ask people why they chose to work in the industry.

Over 2 in 5 of those working in PR agencies polled in the ICCO report think that retaining key talent is one of the biggest challenges PR agencies face when it comes to their talent strategy. Just over a quarter (27%) said that motivating younger executives was a big challenge.

Business leaders, however, adopt a different attitude - they have a passion for what they do. The question is, how do we instil that passion throughout the PR industry?

Tip 1 - Ask the right questions upfront

When young interviewees and new starters ask about professional development plans and opportunities for promotion I always give a classic politician's response and answer their question with a question, or questions. Where do you see yourself in 2-5 years, what drives you, why are you doing this? I ask this because I've come across many people who want a promotion or to advance in their careers without knowing what that looks like. This makes it difficult to drive or support them - and more importantly, to invest in them. Be clear about what are you looking for in a candidate up front, in terms of responsibility, job title and salary and the culture of your organisation - are you looking for someone dynamic to drive big changes quickly, or are you investing in someone with excellent long-term vision to determine strategy?

Tip 2 - Invest in professional development

A high turnover of staff is a disruptive and expensive exercise for any company, and the amount of talent leaving the building can take a long time to regain. A recent report from the IPA revealed that agencies who have invested in outstanding professional development initiatives have an 87% client retention rate, a 69% pitch conversion rate and save over £158K on recruitment fees with an 80% staff retention rate.

“A HIGH TURNOVER OF STAFF IS A DISRUPTIVE AND EXPENSIVE EXERCISE FOR ANY COMPANY, AND THE AMOUNT OF TALENT LEAVING THE BUILDING CAN TAKE A LONG TIME TO REGAIN”

Tip 3 - Create mentorship opportunities

There are companies who are fortunate enough to have internal mentoring schemes. If you don't have that infrastructure seek out a mentoring scheme that allows you to support your talent through referrals or by networking with like-minded professionals. Mentoring opportunities can benefit employees in many ways and give them expertise advice, guidance, networking opportunities and fresh perspective on initiatives or career plan to name a few.

Conclusion

These simple steps can help you to attract and retain the right talent for your business, because after all, business is powered by people. Optimism is mounting around the persistent growth of the PR Industry, which saw a growth of 7.4% in 2016 globally with a net worth of \$15 bn according to The Holmes Report. Now more than ever it's time to let the talent within the industry grow alongside the revenue.

ADAPTING TO CHANGE



JACK PEAT
HEAD OF DIGITAL
72POINT

Is it still OK to say that the media landscape is changing? For years, perhaps decades now, we have talked about the industry as if it is in a transitional period from the hammering printing houses of Fleet Street to the desktops and mobile devices of consumers. But has it not changed, period?

Social media is here to stay and we now have a good idea of what the digital consumption of news looks like, so surely it is time to accept that we have reached a new normal. Finding what that looks like, however, can be a daunting task, which is what makes the ICCO World PR Report such a vital tool for companies and professionals who want to keep abreast of developments in the market.

Not only does it highlight the market's challenges and shortcomings, but it also unearths the areas in which firms are seeing the most growth and where future investment is being placed in order to facilitate that growth. While social media community management was the area which experienced the most growth last year digital and new technologies were also outlined as being the greatest challenge for PR firms, demonstrating the prospects and pitfalls of the digital landscape.

Those who navigate change most successfully will undoubtedly be those who are most open-minded to it. One of the reasons people are still referring to the changing nature of PR and media is that there are so many old hat practices still in use. We must be wary of how relevant they remain in this day and age.

Measurement is undoubtedly one of them. With PR success now infringing heavily on disparate industries, from SEO to social media and marketing, the days of cutting out column inches to measure the value of a campaign are surely numbered.

“WITH NEW ANALYTICS GIVING US A MORE ‘REAL’ IDEA OF SUCCESS AND ENGAGEMENTS INCREASINGLY BECOMING THE CURRENCY OF THE WEB THE DAYS OF GUESTIMATIONS ARE NUMBERED”

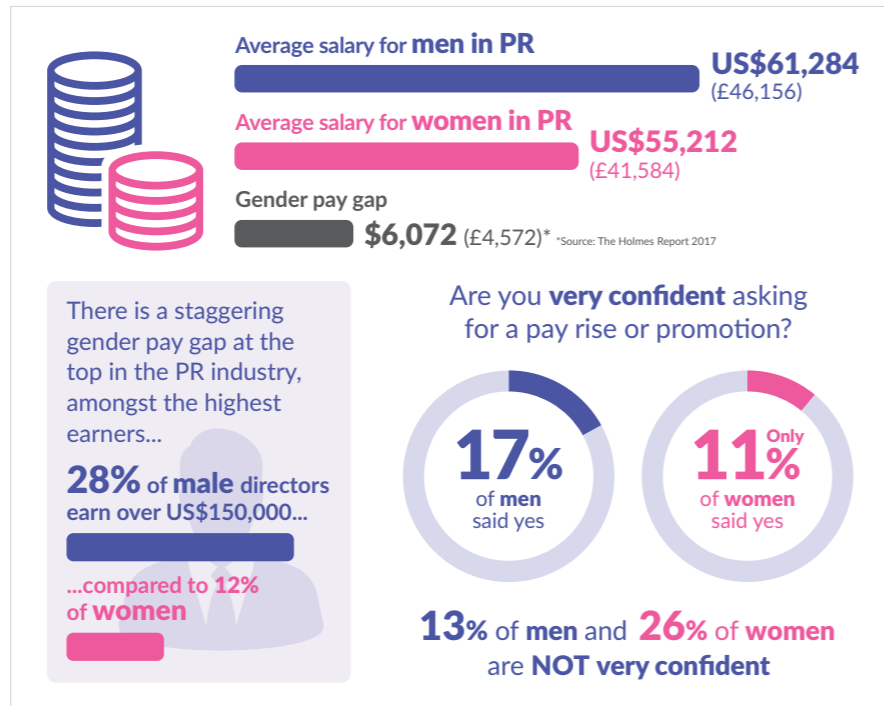
What lies in its place, however, is also up for dispute, and the big argument is whether the industry opts to embrace change. With new analytics giving us a more 'real' idea of success and engagements increasingly becoming the currency of the web the days of guestimations are numbered. But how will that fare against the generous estimates PR firms have become so comfortable with?

Invariably, the answer will lie with those daring enough to embrace change. If that means accepting that your most recent campaign didn't really reach a third of the population of the earth then so be it, but if you can prove sales uplift, improved searchability and social media engagement then you're on to a real winner.

MINDING THE GENDER GAP



ANGELA OAKES
CO-FOUNDER &
JOINT PRESIDENT
GWPR



The lack of women in the boardroom is a major issue affecting the global PR industry. Our annual GWPR survey* aims to establish the facts and to provide us with some clues as to why women are not better represented at the top of a profession where they make up two-thirds of the global PR workforce. Maybe then we can find some solutions.

*GWPR annual survey 2017 conducted via OnePoll. Total number of respondents from across 19 countries was 757 working in the PR industry.

So first the key research findings:

- 78% of CEOs in the top 30 PR agencies worldwide are men
- Two-thirds of the global PR industry is female; however in the agency boardroom these numbers are in complete reverse – 62% male and 38% female
- Global agency leadership teams have a more balanced split 56% male – 44% female
- There is a staggering gender pay gap at the top in the PR industry, amongst the highest earners. 28% of men earn over US\$150,000 compared to 12% of women.
- Twice as many women (26%) say they are 'not very confident' asking for a promotion or pay rise, compared to 13% of men
- 28% of men think they will definitely reach the top of the career ladder, whereas only 18% of women believe this
- 36% of women think the PR industry is ageist, compared with 25% of men

For me one of the most striking findings that jumped out from this year's survey is the gender confidence gap. Why is it that so many women underestimate their own ability? Why do they believe they don't have what it takes to reach the top of the PR profession? What is holding them back?

“WHY IS IT THAT SO MANY WOMEN UNDERESTIMATE THEIR OWN ABILITY? WHY DO THEY BELIEVE THEY DON'T HAVE WHAT IT TAKES TO REACH THE TOP OF THE PR PROFESSION? WHAT IS HOLDING THEM BACK?”

The clues lie in their reasons given for not reaching the top 'it would be too difficult to juggle the demands of a boardroom role with my home and family commitments' (34%) and 'I'm not confident enough' (30%).

So how can we as an industry help women succeed? Number one we have to introduce more flexible working practices. Nor surprisingly, 83% of the survey respondents (both men and women) found balancing childcare and work commitments challenging and 2/3 of women said they took on the main responsibility for organising childcare. It's no surprise we are losing women at mid-career level; they just can't juggle everything.

And yet the vast majority of global PR agencies stick to the out dated workplace model of going to the office '9-5'. Over half (56%) of the survey respondents believed they could do their job just as efficiently if they didn't have a fixed office work space. And a resounding 81% said they felt they would be just as efficient if they could choose the hours they work. Incidentally, the global PR industry average working week was found to be 44 hours.

In these days of 24-7 communications and the ability to stay connected anywhere in the world, why do we need to the traditional 9-5 working day? The PR industry needs to shape up to a newer, more modern way of working. And this, in turn, will help women better manage the demands of work and family commitments.

The second issue is the women's lack of confidence and this may be harder to solve, as the change needs to come from them. We know that gender stereotypes are determined at a very young age and there are social implications. However one solution is mentoring and training women to build confidence. Learning from other successful women that have made it to the top can help enormously in developing the right attitudes to leadership.

GWPR, working with ICCO, is launching a global online training course this Autumn 'Stepping into Leadership' specifically to encourage women to develop their leadership skills and we've involved senior PR women at the very top of their profession so they can tell their story and give guidance.

We need to mind the gender gap so we can retain talented women in the PR industry. A more balanced boardroom makes sound business sense – let's work together to make this happen.

For further information go to: www.globalwpr.com



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ANDREW LAXTON
EXECUTIVE VICE PRESIDENT,
INTERNATIONAL STRATEGY &
MANAGING DIRECTOR, EUROPE
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The unprecedented speed of technological change is transforming the global economy like never before and as organisations race to adapt to changing audience behaviour no other profession is being impacted and tested more so than the PR profession.

As we learn to navigate our way through this rapidly changing world, where technology and digital communications now converge across all forms of stakeholder engagement, the search for talent has also taken a new direction.

Agencies can no longer rely on a singular service delivery model; the era of the hybrid marketing professional is upon us and those agencies who are embracing this philosophy are already edging ahead of the chasing pack.

According to the ICCO World PR Report 2017, retaining key talent is still the biggest people strategy challenge agency heads in North America (53%) and the UK (54%) face, while training and developing junior to mid-level staff was identified as the key obstacle for those polled in Latin America (59%) and the Middle East (39%) to overcome.

When asked what skillsets will be most relevant for PR executives over the next decade, North American (49%) and UK (44%) agencies highlighted measurement and analytics; Latin American respondents ranked multimedia content creation (59%); and those surveyed in the Middle East identified social media community management (61%).

Attracting talent from rival agencies was still the primary source of recruitment but one interesting shift across all four regions this year saw the advertising and marketing sector make it into the top three hiring targets for PR agencies.

So how should the profession respond to this transformational change?

Human Resources will become more complex yet far more critical when sourcing, training and retaining the right mix of talent to engage with an increasingly mobile, multi-channel audience.

“HUMAN RESOURCES WILL BECOME MORE COMPLEX YET FAR MORE CRITICAL WHEN SOURCING, TRAINING AND RETAINING THE RIGHT MIX OF TALENT”

Adapting to this new generation PR model also requires a diverse approach to hiring talent across media planning, coding, web architecture, story boarding, graphic design and video production. What were previously viewed as unconventional roles within PR are now core to the future success of our profession.








Audiences no longer differentiate between advertising, public relations, paid, earned or owned influence. Those agencies that recognize this and take advantage of the lack of differentiation by hiring the right mix of talent to create content-rich, highly measurable engagement campaigns will be talking about their success for years to come.

WORLD PR REPORT
DIRECTORY OF ICCO MEMBERS

COUNTRY/ REGION	TRADE ASSOCIATION	# OF AGENCY MEMBERS	WEBSITE	EMAIL
Armenia	Armenian Public Relations Association (APRA)	73 indiv.	apra.am	info@apra.am
Australia	Public Relations Institute of Australia (PRIA)	93	pria.com.au	membership@pria.com.au
Austria	Public Relations Verband Austria (PRVA)	67	prva.at	office@prva.at
Belgium	Belgium Public Relations Consultants Association (BPRCA)	24	bprca.be	info@bprca.be
Brazil	Brazilian Association of Communication Agencies (ABRACOM)	193	abracom.org.br	contacto@abracom.org.br
Bulgaria	Bulgarian Association of Public Relations Agencies (BAPRA)	22	bapra.bg	office@bapra.bg
Canada	Canadian Council of Public Relations Firms (CCPRF)	26	ccprf.ca	david.gordon@cohnwolfe.ca
Croatia	The Croatia Association for Public Relations (HUOJ)	140 indiv.	huoj.hr	info@huoj.hr
Czech Republic	Czech Association of Public Relations Agencies (APRA)	18	apra.cz	info@apra.cz
Denmark	Public Relations Branchen	29	publicrelationsbranchen.dk	dmj@danskerhverv.dk
Finland	The Finnish Association of Marketing, Technology and Creativity (MTL)	30	mtl.fi	info@mtl.fi
France	Syntec Conseil en Relations Publics	48	syntec-rp.com	office@groupement-syntec.org
Georgia	Association of Communications Agencies Georgia (ACAG)	18	www.acag.ge	e.zhvania@gepra.ge
Germany	German Public Relations Association (GPRA)	35	gpra.de	info@gpra.de
Greece	Hellenic Association of Communications Agencies (EDEE)	15	edee.gr	edee@edee.gr
Hungary	Hungarian PR Association (HuPRA/MPRSZ)	13	mprsz.hu	mprsz@mprsz.hu
India	Public Relations Consultants Association of India (PRCAI)	37	prcai.org	jayoti.lahiri@prcai.org
Ireland	Public Relations Consultants Association of Ireland (PRCA)	27	prcai.ie	info@prcai.ie
Iran	Iranian Public Relations House (IPRH)	-	arman-pr.com	amirrastegar51@gmail.com
Italy	Italian Association of Public Relations Agencies (Assorel)	18	www.assorel.it	info@assorel.it

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COUNTRY/ REGION	TRADE ASSOCIATION	# OF AGENCY MEMBERS	WEBSITE	EMAIL
Italy	Association of Communications Companies (Assocom - PR Hub)	89 + 26	www.assocom.org/ www.prhub.it	info@assocom.org
Kazakhstan	National Public Relations Association of the Republic of Kazakhstan (HACO)	8	naso.kz	asel@pressclub.kz
MENA	Public Relations and Communications Association Middle East and North Africa (PRCA MENA)	31	prca.mena.global	leanne.foy@prca.mena.global
Netherlands	Dutch Association for PR and Communications Agencies (VPRA)	59	vpri.nl	info@vpri.nl
Nigeria	Public Relations Consultants Association of Nigeria (PRCAN)	50	prcan.ng	prcan@prcann.com
Norway	Certified Communications Agencies Association (KOMM)	13	abelia.no	post@abelia.no
Poland	Zwiazek Firm Public Relations (ZFPR)	35	www.zfpr.pl	info@zfpr.pl
Portugal	Portugese Association of Business Council in Communication and Public Relations (APECOM)	22	www.apecom.pt	sofia.barros@apecom.pt
Romania	Romanian Public Relations Association (ARRP)	7	arrp.eu	arrpoffice@gmail.com
Russia	Association of Consultancies in the Field of Public Relations (AKOS)	38	akospr.ru	director@akospr.ru
Serbia	Public Relations Society of Serbia (DSOJ/PRSSRB)	52	pr.org.rs	drustvo@pr.org.rs
Slovakia	Association of Public Relations Slovak Republic (APRSR)	11	aprsr.eu	info@aprsr.eu
Southern Africa	The Public Relations Institute of Southern Africa (PRISA)	44	prisa.co.za	info@prisa.co.za
Spain	The Association of Communications and PR Consultancy Companies (ADECEC)	30	adecec.com	adecec@adecec
Sweden	The Association of Public Relations Consultancies in Sweden	31	precis.se	info@precis.se
Switzerland	Association of Swiss PR Agencies (BPRA)	23	bpra.ch	info@bpra.ch
Turkey	Communication Consultancies Association of Turkey (IDA)	28	ida.org.tr	ida@ida.org.tr
United Kingdom	Public Relations and Communications Association (PRCA)	462	prca.org.uk	francis.ingham@prca.org.uk
United States	PR Council	106	prcouncil.net	contact@prcouncil.net

	NAME	CONTACT PERSON	CONTACT DETAILS
	GLOBALCOM PR NETWORK	Ralf Hartman	Coordination HQ Muenchener Str. 14 85748 Garching Bei Muenchen Germany +49 89 3603 6350 www.gcpr.net
	GOLIN	Bibi Hilton	2 Waterhouse Square 140 Holborn London EC1N 2AE United Kingdom +44 20 7067 0600 www.golin.com
	GRAYLING	Sarah Scholefield	29 – 35 Lexington Street London W1F 9AH United Kingdom +44 20 7025 7500 www.grayling.com
	HILL+KNOWLTON STRATEGIES	Sam Lythgoe	The Buckley Building 49 Clerkenwell Green London EC1R 0EB United Kingdom +44 20 7413 3000 www.hkstrategies.com
	HOTWIRE	Andy West	69 Wilson Street London EC2A 2BB United Kingdom +44 20 7608 2500 www.hotwirepr.com
	INSTINCTIF PARTNERS	Donna Zurcher	65 Gresham St London EC2V 7NQ United Kingdom +44 20 7457 2020 www.instinctif.com
	INTEREL GROUP	George McGregor	Interel Group Greencoat House, Francis Street London, SW1P 1DH United Kingdom +44 20 7592 3800 www.interelgroup.com

	NAME	CONTACT PERSON	CONTACT DETAILS
	IPREX	Andrei Mylroie	315 West Riverside, Suite 200 Spokane WA 99201 USA +1 414 755 2170 www.iprex.com
	MWWPR	Patrick Herridge	56A Poland Street, 2nd floor London W1F 7NN United Kingdom +44 20 7046 6080 www.mww.com
	OGILVY	Marshall Manson	Sea Containers, 18 Upper Ground London SE1 9RQ United Kingdom +44 20 3193 3000 www.ogilvy.com
	SERMO NETWORK	Tanya Hughes	3-5 Rathbone Place London, W1T 1HJ United Kingdom +44 20 7268 6100 www.sermocommunications.com
	SPN COMMUNICATIONS	Andrey Barannikov	Ryady Soldatenkova Building Danilovskaya Manufactura Business Centre 9/1, Varshavskoye Shosse 117105, Moscow, Russia +7 495 510 22 00 www.spncomms.com
	THENETWORKONE	Paul Squirrell	48 Beak St, Carnaby London W1F 9RL United Kingdom +44 20 7240 7117 www.thenetworkone.com
	WEBER SHANDWICK	Rachel Friend	2 Waterhouse Square 140 Holborn London EC1N 2AE United Kingdom +44 20 7067 0000 www.webershandwick.com

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31a Great Sutton Street
London
EC1V 0NA

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London
SE1 0BE

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