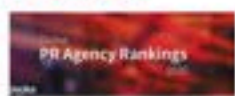


ICCO WORLD PR REPORT 2023-2024

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AGENCY VIEWS OF THE PATH AHEAD

PRovoke
Media



⁰⁷
Op
Opinium

THE INTERNATIONAL COMMUNICATIONS CONSULTANCY ORGANISATION (ICCO)

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

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

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NETWORKS ACROSS 82 COUNTRIES

THOUGHT LEADERSHIP AND RESEARCH



INTERNATIONAL EVENTS

100S OF PROFESSIONAL DEVELOPMENT AND LEARNING RESOURCES



INTERNATIONAL MATCHMAKING AND PARTNER DEVELOPMENT

KNOWLEDGE EXCHANGE AND COLLABORATIVE CAMPAIGNS





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EXECUTIVE SUMMARY

EMBRACING RAPID TRANSFORMATION



Rob Morbin

ICCO EXECUTIVE DIRECTOR

This year's report is a steadfast reminder of our industry's ability to grow, adapt, and invest, in the face of an ever-transforming business environment. We are embracing new technologies, skill requirements and a necessity for improved employee welfare, diversity, equality, and ethics. However, stern challenges persist amidst these opportunities, and there is much still to overcome.

Optimism despite volatile conditions

Up to two billion people will vote in elections in 2024, and unfortunately, we are becoming far too familiar with pervasive geopolitical crises, conflicts, and economic uncertainty. The challenges of 2023 are set to continue across the next twelve months, more deeply in some regions than others. The joint top ranked

challenge is 'economic conditions generally', with 42% of PR leaders ranking it as a top three challenge alongside 'clients unwilling to commit sufficient funds', also 42%.

Despite this, a hefty 96% of global PR organisations expect to grow in the five years. Overall PR leaders' perceptions of growth and profitability remain positive, with an average rating of 7.0 in agreement that the PR market will grow in 2024, down slightly from 7.3 last year. Leaders still agree that they expect an increase in the profitability of their organisations, with a rating of 6.2, although this is a dip from 7.0 in 2022.

The sectors most expected to grow for agency work are again IT and technology, with 49% of respondents ranking it top 3, but this is less pronounced than it has been, down from 60% in 2022 and as high as 67% in 2021. Financial services is second up from third with 40%, although at lower percentage than 2022 (44%) and healthcare is third down from second with 39%, down from 51% in 2022. The covid years saw huge concentration of resource poured into IT and healthcare but the greater spread of sectors expected to grow is healthier and poses less risk for agencies in such a volatile market.

AI dominates the conversation

The mass commercialisation of AI in 2023 presents a mouth-watering

opportunity for agencies, with 86% (up from 40% in 2022) rating AI in their top three most relevant technologies for the future of their business. Data science is pushed down to second at 41% (42% in 2022).

The top skill for the future is 'mastery of AI tools' with 45% ranking this in their top three, a new option for this year rising above strategic consulting, 42%.

The top application of new technology is 'operating more efficiently' at 55%, up from 40% and fourth rank in 2022. Building online communities is second with 47%, up from 44% and improved employee engagement is third with 38%, down from 41% in 2022.

The area of the business that leaders expect new technologies to have the greatest impact is again measurement and analytics at 22% (21% in 2022). Multimedia content creation is second with 19%, up from sixth at 8% in 2022. The evidence of AI generated content is ubiquitous, and agencies are taking advantage of easily accessible tools to improve efficiency, quality, and quantity of content.

Time to better demonstrate impact

The AI revolution is at the heart of improving efficiency, and measurement and analytics

EXECUTIVE SUMMARY

continues to be a beneficiary with evermore sophisticated evaluation and analysis available. Measurement metrics remained most used for reporting (82% up from 72% in 2022) and planning (53%, down from 57%) with 'justifying fees and budgets' being the third ranked usage with 52% (down from 56%).

Use of AMEC tools continues to grow, with a total of 59% of respondents using, the UK remains region with greatest usage at 74% but the biggest movement is in Africa, with usage jumping to 71% up from 41% in 2022. Use of AVE, banned from ICCO Awards entries, and discredited by AMEC, unfortunately still exists. The data suggests this is driven by clients, with 34% ranking AVE as a likely client request. This is down from 41% in 2022 but is at odds with clients' top 3 objectives – proactively improving corporate reputation, increased sales, and building brand purpose. When these inaccurate measurements are used to justify fees, justice is not being served – to the agency or the client, and education is needed on both sides. With the media landscape changing so rapidly, demonstrating the impact of PR is vital. The range of sophisticated tools and accessibility of clear guidance from AMEC mean that there are no excuses.

ESG, an obligation and an opportunity

ESG (Environmental, Social, Governance) is the area agencies expect the most investment (49%, up from 44% in 2022 and 32% in 2021).

With influencer comms and strategic consulting completing the top three for the second year running. The top social issue clients are likely to prioritise is again sustainability and environment (69% up from 62%). Over the years this issue had fallen down the rankings, but it has come back as top rank in the last two years, as the frequency of major climate events increases dramatically across the world. For the first time, this has been the top issue in every single one of our seven regional break downs. ICCO's partnership with the United Nations and formation of the Climate Campaigns Taskforce is a direct response to this trend. The role PR can play in this fight is pivotal, and as with AI, presents both a colossal challenge and opportunity.

People first, the rest will follow

There is so much detail and data to pour over in this report, but behind the numbers are the people. Across chapters on mental health, DE&I, ethics, skills as well as the preview of the GWPR Index, we can think about what drives successful businesses.

There are steady improvements in those reporting that they have DEI policies in place (%) and a dedicated person responsible for these (%), but this not quite matched by those believing the workforce adequately represents the ethnic diversity of public served (%).

Mental health provision is also improving. It was tragic to see that last year 45% of respondents reported suffering mental health in the previous

12 months. The pressures and trauma coming out of the covid years still weighing heavy and this stat was a huge wake up call. This year it is down to 32%, still remarkably high but moving in the right direction. Those saying mental health provision is effective is up to 78% from 58%, which is a huge achievement.

Elsewhere, the top ethical challenges are 'a lack of consequences for ethical bad behaviour' and misinformation, which has been turbocharged by AI. Industry bodies and international organisations must come together in tackling these issues that impact all section of the media and society.

In conclusion

The dial has shifted in the last twelve months in the right direction on many of our priority issues, some at a slower pace than I am sure we would like. Despite the tough conditions, which show no signs of softening, I am heartened by most leaders expressing optimism, expecting their agencies to grow and to be more profitable. PR firms will not be resting on their laurels – grappling AI, misinformation, and climate, all whilst nurturing creative and talented teams, is no mean feat. The obstacles can seem both exciting and daunting, but I have no doubt we will adapt and flourish, as we have done countless times before.

(Rating scales 0 = strong disagreement, 10 = strong agreement)

(Percentages = respondents who submitted the answers as one of their top 3)

THE FUTURE IS GREEN FOR PR AS CLIENTS SET THEIR FOCUS ON CSR AND SUSTAINABILITY



James Endersby

**CHIEF EXECUTIVE
OPINIUM**

We are proud to be partnering with ICCO on the World PR Report for a fourth year. Our research and insights equip PR leaders and influencers with the strategic expertise to address challenges, capitalise on opportunities and effectively position themselves as a value asset, for clients, competitors, potential partners and future employees alike.

Despite global challenges in the shape of tough economic conditions (42%), and as a result, client reluctant to commit funds, it's been a brighter year for the industry. Two in three (65%) agencies are expecting an increase in profitability this year, with four in five (80%) optimistic about the growth of the PR industry in their country over the coming 12 months. Tech (46%) and financial services (35%) came out top of the client sector growth lists.

Strategic consulting (47%), corporate reputation (40%) and CSR (38%) are the service areas that agencies expect to be the largest areas of growth over the next 5 years. This is no surprise as a clear focus over the coming years is sustainability, as we all look to keep pace with net zero targets, the PR industry is braced for clients increasingly focusing on ESG over the next year (49%). Sustainability and the environment (69%) is also overwhelming noted as the top social issue clients are seeking to address.

The growth of digital and tech continues with the fast rise of AI set to significantly impact the future of PR.

The global PR industry continues to immerse itself in the latest tech, with the emergence of AI over the last 12 months already effecting the industry. Two in three (65%) believe the PR industry is adapting to new technologies at an appropriate pace. Three in five (59%) have already started to implemented aspects of AI into their everyday processes, with a further quarter (27%) planning to do so. The vast majority (86%) agree that AI will be the most relevant tech over the next decade and believe it will have a significant impact on the industry (96%).



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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PROI FEEDBACK ON GROWTH & INVESTMENT DATA

AGENCIES BOLDLY INVESTING IN UNCERTAIN FUTURE



Jeff Altheide

**GLOBAL MANAGING DIRECTOR
PROI WORLDWIDE**

To contribute to the ICCO World PR Report, we sought feedback on growth and investment data from a focus group of senior leaders at PROI Worldwide agencies in a dozen countries. **Their perspectives provide a glimpse into three key areas of agency growth.** PROI represents 90 entrepreneurial communications firms in more than 65 countries, which operate on the front lines of these global communications trends.

Optimism Despite Challenges

“Faced with an uncertain economic recovery, there is increasing pressure on profit margins as well as staff retention, both of which limit the ability of future investments and growth,” said the CEO of an Asian agency.

Profit margin pressure from escalating agency costs (particularly staff salaries) have firms evaluating all aspects of their operations, from in-office and remote working structures to staff recruitment and retention programs. Fine tuning operating processes, adopting new productivity tools and business skills training are helping agencies protect margins.

Despite challenging local dynamics, most firms are approaching the year ahead with cautious optimism. Country by country, there were big disparities in general economic health, key target markets, and availability of talent which are fostering different strategies to minimize risk and find growth wherever it exists.

“We have an ambitious investment plan and dedicate a fixed time slot for our board to consider evaluation of new trends and investment requirements,” said one European agency CEO. “We need to make decisions and implement them in a really fast way.”

Focus on Business Outcomes

Short-term, economic conditions are leading some clients to reward any ideas and programs that can move sales. Several focus group agencies reported their budgets have increased in retail and integrated marketing programs. And, some are adapting their new business approach accordingly.

“Our agency is creating products that are easier to buy for our clients who need to convince their CFOs, and reduce the friction about getting clients to spend,” said the chair of an African PROI agency.

Longer-term, many of the primary areas of agency investment identified in ICCO research, particularly ESG (environmental, social and governance) and strategic consulting, are major growth areas for PROI agencies. They are hiring senior level and non-traditional staff, expanding staff training, and collaborating with other professionals (from engineering to financial and legal experts).



PROI FEEDBACK ON GROWTH & INVESTMENT DATA

“This is having a positive impact, as the work commands more senior expertise and higher fees,” said the co-founder of a Middle East PR firm. “Working with the most senior stakeholders in the client’s business also improves the prospects for long-term retained partnerships.”

Crisis-Driven Evolution

Unfortunate global climate and geopolitical trends are evolving the business model of some agencies to deliver expanded crisis and issues management services. On the climate front alone, many parts of the world are facing increasing natural disasters that require crisis preparation and training, and immediate and effective communication to address the needs of communities, customers, employees and other stakeholders.

Wars and political tensions worldwide require communications leaders to offer strategic counsel that prepares clients for disruptions in business operations and supply chains, to pivot on marketing plans, and to anticipate possible product boycotts and attacks on corporate reputation.

Explained a partner with a European agency, “We are hiring more strategic consultants and taking internal measures to ensure we match the concerns and world view of our clients - understanding the macro picture and understanding how communications can make a positive impact.”

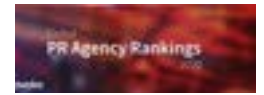


PROVOKE TOP 250 RANKINGS



2023 RANK	2022 RANK	AGENCY	HQ	FEE INCOME 2023 (\$)	FEE INCOME 2021 (\$)	STAFF	GROWTH vs 2021 (USD)	GROWTH (CONSTANT CURRENCY)
1	1	Edelman ^{nb}	USA	1,079,738,000	984,921,000	6,433	9.6%	9.6%
2	2	Weber Shandwick ^{nb}	USA	920,000,000	860,000,000		7.0%	7.0%
3	3	BCW	USA	840,000,000	772,000,000		8.8%	8.8%
4	4	FleishmanHillard ^{nb}	USA	750,000,000	680,000,000		10.3%	10.3%
5	5	Ketchum ^{nb}	USA	600,000,000	550,000,000		9.1%	9.1%
6	7	Real Chemistry ^{nb}	USA	555,000,000	475,000,000	1,977	16.8%	16.8%
7	14	Vector Inc. ^{nb}	Japan	494,080,000	292,400,000	1,421	69.0%	69.0%
8	6	Brunswick	UK	471,900,000	469,125,000	1,250	0.6%	12.2%
9	9	MSL	France	425,000,000	387,000,000	2,110	9.8%	9.8%
10	8	FGS Global ^{nb}	USA	421,000,000	390,000,000	1,099	7.9%	7.9%
11	10	Hill+Knowlton Strategies ^{nb}	USA	410,000,000	370,000,000		10.8%	10.8%
12	12	Ogilvy ^{nb}	USA	405,000,000	366,000,000		10.7%	10.7%
13	20	Evoke ^{nb}	USA	368,000,000	316,000,000	1,430	16.5%	16.5%
14	13	Media Consulta International Holding AG	Germany	350,220,000	297,650,000	1,999	17.7%	17.7%
15	15	Golin ^{nb}	USA	313,000,000	282,000,000		11.0%	11.0%
16	11	BlueFocus	China	309,257,521	368,590,924	2,885	-16.1%	-9.2%
17	16	FTI Consulting	USA	286,666,000	267,647,000	814	7.1%	7.1%
18	18	Teneo Holdings	UK	220,000,000	200,000,000	1,000	10.0%	10.0%
19	17	ICF Next	USA	206,970,423	215,408,957	1,210	-3.9%	-3.9%
20	24	Finn Partners ^{nb}	USA	196,830,912	162,202,666	1,407	21.3%	21.3%
21	30	SEC Newgate sp ^{nb}	Italy	195,774,160	106,186,819	1,240	84.4%	84.4%
22	22	APCO Worldwide	USA	186,300,000	172,398,000	1,049	8.1%	8.1%
23	21	WE Communications ^{nb}	USA	182,000,000	172,600,000	1,477	5.4%	5.4%
24	23	D&S Media	China	177,278,450	171,274,471	971	3.5%	12.1%
25	39	Pomilio Blumm	Italy	174,511,180	69,599,280	294	150.7%	167.1%
26	19	ICR	USA	161,000,000	195,000,000	378	-17.4%	-17.4%
27	29	Ruder Finn ^{nb}	USA	160,100,000	112,200,000	1,140	42.7%	42.7%
28	26	GCI Health	USA	145,000,000	127,000,000	500	14.2%	14.2%
29	28	Zeno Group	USA	138,429,850	118,643,933	715	16.7%	16.7%
30	25	Sunny Side Up Group Inc	Japan	137,653,000	126,833,000	325	8.5%	8.5%
31	27	Syneos Health	USA	120,000,000	120,000,000	337	0.0%	0.0%
32	33	Allison+Partners	USA	118,500,000	93,300,000	514	27.0%	27.0%
33	31	Porter Novelli	USA	100,000,000	98,000,000		2.0%	2.0%
33	32	SKD Knickerbocker	USA	100,000,000	95,000,000	200	5.3%	5.3%
35	35	Prosek Partners	USA	91,650,000	80,050,000	340	14.5%	14.5%
36	76	Farner Consulting ^{nb}	Switzerland	86,949,514	41,616,548	497	108.9%	122.6%
37	36	Hopscotch Groupe ^{nb}	France	80,250,000	76,494,000	825	4.9%	11.8%
38	58	Spectrum Science ^{nb}	USA	80,000,000	48,850,000	303	63.8%	63.8%
39	44	Grupo FSB ^{nb}	Brasil	79,553,000	52,632,000	1,328	51.1%	43.2%
40	42	LLYC ^{nb}	Spain	77,815,750	60,797,750	1,127	28.0%	36.4%
41	34	FischerAppelt	Germany	77,254,000	82,650,000	520	-6.5%	-0.4%
42	40	Archetype	USA	75,000,000	65,500,000	650	14.5%	14.5%
43	51	H&H Group ^{nb}	Sweden	73,035,000	50,500,000	579	44.6%	44.6%
44	n/a	Beijing AmaxZ Marketing & Communication Technology Co. Ltd.	China	71,275,836	66,857,957	330	6.6%	15.4%
45	49	Global Strategy Group	USA	67,932,569	53,386,422	145	27.2%	27.2%
46	54	Joele Frank	USA	65,000,000	50,000,000	120	30.0%	30.0%
47	46	M Booth ^{nb}	USA	63,292,863	58,055,889	273	9.0%	9.0%
48	56	5W Public Relations	USA	62,922,235	49,997,947	278	25.8%	25.8%
49	64	Bully Pulpit Interactive	USA	61,400,000	47,200,000	205	30.1%	30.1%
50	45	Serviceplan PR Group	Germany	60,850,900	58,254,000	287	4.5%	11.3%

PROVOKE TOP 250 RANKINGS



2023 RANK	2022 RANK	AGENCY	HQ	FEE INCOME 2023 (\$)	FEE INCOME 2021 (\$)	STAFF	GROWTH vs 2021 (USD)	GROWTH (CONSTANT CURRENCY)
51	50	CYTS-LINKAGE	China	60,800,000	52,800,000	220	15.2%	15.2%
52	47	R&CPMK ^{nb}	USA	60,000,000	55,000,000	264	9.1%	9.1%
53	59	Hotwire Globalnb	USA	59,715,022	48,223,657	430	23.8%	23.8%
54	43	Grayling	UK	59,290,000	60,210,000	515	-1.5%	9.9%
54	41	Lewis	UK	59,290,000	63,450,000	370	-6.6%	4.3%
56	47	DKC Public Relations	USA	58,000,000	55,000,000	225	5.5%	5.5%
57	57	Prain Global ^{nb}	Korea	53,952,312	49,075,262	309	9.9%	9.9%
58	65	MikeWorldWide	USA	53,093,000	45,390,416	227	17.0%	17.0%
59	53	Adfactors PR Pvt Ltd	India	52,060,000	50,110,000	1,300	3.9%	3.9%
60	37	Marina Maher Communications ^{nb}	USA	52,000,000	50,000,000	195	4.0%	4.0%
61	68	Hunter Public Relations	USA	51,200,000	42,300,000	248	21.0%	21.0%
62	82	Padilla ^{nb}	USA	50,774,739	36,198,229	229	40.3%	40.3%
63	38	Freuds ^{nb}	UK	50,720,856	52,971,748	245	-4.2%	6.8%
64	n/a	Lippe Taylor	USA	50,700,000	34,300,000	210	47.8%	47.8%
65	71	Grupo Inpress	Brazil	50,585,111	41,826,596	767	20.9%	14.6%
66	60	National PR	Canada	50,000,000	48,000,000	270	4.2%	4.2%
66	54	PRAP Japan	Japan	50,000,000	50,000,000	332	0.0%	0.0%
68	72	Rud Pedersen ^{nb}	Sweden	49,603,060	44,602,500	360	11.2%	18.5%
69	66	Imre	USA	49,000,000	45,052,000	250	8.8%	8.8%
70	60	Dentsu Public Relations	Japan	48,000,000	48,000,000	360	0.0%	0.0%
71	60	Portland Communications	UK	47,000,000	48,000,000	270	-2.1%	-2.1%
71	74	Red Havas Group ^{nb}	USA	47,000,000	43,200,000	370	8.8%	8.8%
73	70	MHP Group	UK	45,000,000	42,120,000	197	6.8%	6.8%
74	85	Day One Agency	USA	43,000,000	35,000,000	175	22.9%	22.9%
75	69	Kreab	UK/Sweden	42,800,000	42,180,000	400	1.5%	8.1%
76	52	Kyodo Public Relations	Japan	42,112,000	47,376,000	232	-11.1%	0.0%
77	73	Instinctif Partners	UK	40,276,060	41,391,000	330	-2.7%	8.6%
78	79	Carmichael Lynch Relate	USA	40,000,000	37,600,000	114	6.4%	6.4%
78	89	Matter Communications	USA	40,000,000	30,116,000	254	32.8%	32.8%
80	75	Kivvit	USA	39,724,407	39,500,353	131	0.6%	0.6%
81	90	Fahlgren Mortine ^{nb}	USA	39,510,760	30,039,544	286	31.5%	31.5%
82	83	Coyne PR	USA	39,106,766	35,900,000	189	8.9%	8.9%
83	88	Atrevia ^{nb}	Spain	38,656,627	31,948,532	439	21.0%	28.9%
84	84	Precision	USA	38,000,000	35,529,332	121	7.0%	7.0%
85	80	Four Communications Group ^{nb}	UK	37,473,638	37,128,470	335	0.9%	12.6%
86	81	French/West/Vaughan ^{nb}	USA	37,461,997	36,727,448	134	2.0%	2.0%
87	77	Current Global	USA	36,941,000	38,235,000	206	-3.4%	-3.4%
88	106	Next Practices Group ^{nb}	USA	35,830,243	27,944,958	180	28.2%	28.2%
89	96	Citizen Relations ^{nb}	USA	35,108,713	29,123,190	185	20.6%	20.6%
90	102	Havas Formula	USA	34,449,153	26,718,617	190	28.9%	28.9%
91	95	Highwire Public Relations, Inc.	USA	34,010,000	29,250,000	120	16.3%	16.3%
92	101	M&C Saatchi Sport & Entertainment	UK	33,229,020	27,599,654	211	20.4%	34.3%
93	91	Dentons Global Advisors	USA	33,000,000	30,000,000	250	10.0%	10.0%
94	134	Premier	UK	32,791,000	17,135,550	167	91.4%	113.5%
95	86	Hanover Communications	UK	32,307,000	34,425,000	190	-6.2%	4.7%
96	92	Walker Sands ^{nb}	USA	31,579,117	29,961,330	180	5.4%	5.4%
97	93	Crosby	USA	30,383,072	29,421,739	112	3.3%	3.3%
98	104	PAN Communications	USA	30,350,000	26,131,000	209	16.1%	16.1%
99		Hahm Partners	Korea	29,913,426	22,800,000	82	31.2%	31.2%
100	94	achtung!	Germany	29,863,700	29,412,000	181	1.5%	8.2%

PROVOKE TOP 250 RANKINGS



2023 RANK	2022 RANK	AGENCY	HQ	FEE INCOME 2023 (\$)	FEE INCOME 2021 (\$)	STAFF	GROWTH vs 2021 (USD)	GROWTH (CONSTANT CURRENCY)
101	100	Headland Consultancy	UK	29,761,001	27,690,927	137	7.5%	19.9%
102	105	Praytell	USA	29,675,000	25,500,000	168	16.4%	16.4%
103	108	G&S Business Communications	USA	28,800,000	24,802,633	160	16.1%	16.1%
104	99	Oliver Schrott Kommunikation	Germany	28,665,300	27,827,400	230	3.0%	9.8%
105	103	Brands2Life	UK	28,615,000	24,679,000	192	15.9%	15.9%
106	111	Jackson Spalding	USA	28,010,652	24,045,390	137	16.5%	16.5%
107	87	PR One	South Korea	27,711,797	33,599,328	200	-17.5%	-17.5%
108		Excellera Advisory Group nb	Italy	27,283,523	24,808,250	114	10.0%	17.2%
109	109	InkHouse	USA	27,000,000	24,782,746	125	8.9%	8.9%
110	114	Taylor Global, LLC	USA	26,518,857	22,057,007	103	20.2%	20.2%
111	116	The Hoffman Agency	USA	26,326,000	20,158,000	240	30.6%	30.6%
112	97	Gullers Grupp	Sweden	26,000,000	28,142,400	194	-7.6%	1.6%
113	152	Wachsman ^{nb}	USA	25,400,000	13,959,000	155	82.0%	82.0%
114	107	Medicom	South Korea	25,000,000	25,000,000	180	0.0%	0.0%
115	130	Vested ^{nb}	USA	23,811,000	17,543,000	84	35.7%	35.7%
116	125	KPR & Associates	South Korea	23,638,642	18,416,289	145	28.4%	28.4%
117	110	FAKTOR 3 AG	Germany	23,593,500	24,339,000	229	-3.1%	3.3%
118	113	V+O Advertising & Consulting ^{nb}	Greece	23,058,739	21,702,215	183	6.3%	13.2%
119	122	Mission North	USA	22,571,676	19,326,314	83	16.8%	16.8%
120	140	M Booth Health	USA	22,014,863	16,290,421	65	35.1%	35.1%
121	121	Faktenkontor Group ^{nb}	Germany	21,785,200	19,095,000	160	14.1%	21.6%
122	112	Citigate Dewe Rogerson	UK	21,780,000	22,950,000		-5.1%	5.9%
123	117	W Communications	UK	21,522,270	19,845,000	161	8.5%	21.0%
124	128	JIN	France	21,400,000	17,898,000	80	19.6%	27.4%
125	122	LaForce	USA	21,000,000	19,000,000	110	10.5%	10.5%
125	260	Redhill Communications ^{nb}	Singapore	21,000,000	6,122,330	301	243.0%	238.4%
127	126	Method Communications	USA	20,870,591	18,352,958	93	13.7%	13.7%
128	145	Marathon Strategies	USA	20,812,870	15,516,883	48	34.1%	34.1%
129	139	Lambert Global	USA	20,233,000	16,671,000	92	21.4%	21.4%
130	127	LaunchSquad	USA	20,144,000	18,329,000	126	9.9%	9.9%
131	115	Strategic Public Relations Group	Hong Kong	20,100,000	21,100,000	210	-4.7%	-4.7%
132	141	Gregory FCA	USA	20,000,000	16,287,822	81	22.8%	22.8%
132	120	Regan Communications Group	USA	20,000,000	19,143,913	118	4.5%	4.5%
134	138	JPA Health Communications	USA	19,965,000	14,500,000	91	37.7%	37.7%
135	166	Another	Mexico	19,854,410	11,756,600	258	68.9%	68.9%
136	n/a	iFok	Germany	19,655,900	13,246,800	233	48.4%	58.1%
137	135	Argyle ^{nb}	Canada	19,274,780	17,089,788	150	12.8%	20.4%
138	143	The Zimmerman Agency	USA	19,000,000	16,200,000	44	17.3%	17.3%
139	119	Barabino & Partners	Italy	18,725,000	19,380,000	105	-3.4%	2.9%
140	118	Proof Strategies	Canada	18,500,000	19,750,000	130	-6.3%	0.0%
141	162	Bospar	USA	18,164,539	12,403,000	98	46.5%	46.5%
142	124	The Red Consultancy	UK	17,424,000	18,512,550	126	-5.9%	5.0%
143	164	J Public Relations	USA	17,000,000	12,118,000	79	40.3%	40.3%
143	136	Levick Strategic Communications	USA	17,000,000	17,000,000	70	0.0%	0.0%
145	137	The Geelmuyden Kiese Group	Norway	16,932,000	16,373,700	110	3.4%	14.6%
146	133	LDWW	USA	16,908,878	17,392,144	52	-2.8%	-2.8%
147	157	Palmer Hargreaves	Germany	16,745,500	13,600,200	165	23.1%	31.2%
148		Smarts	UK	16,597,570	14,710,950	119	12.8%	25.9%
149	142	C+C	USA	16,382,916	16,266,920	90	0.7%	0.7%
150		Ogilvy PR ANZ	Australia	16,355,814	15,768,899	110	3.7%	11.3%

PROVOKE TOP 250 RANKINGS



2023 RANK	2022 RANK	AGENCY	HQ	FEE INCOME 2023 (\$)	FEE INCOME 2021 (\$)	STAFF	GROWTH vs 2021 (USD)	GROWTH (CONSTANT CURRENCY)
151	147	Marco ^{nb}	Spain	16,265,763	14,818,290	185	9.8%	16.9%
152	132	Lansons	UK	16,186,381	17,091,878	88	-5.3%	5.7%
153	144	rbb Communications ^{nb}	USA	16,133,120	16,331,009	78	-1.2%	-1.2%
154	172	Icon Agency	Australia	15,837,258	11,067,500	92	43.1%	53.6%
155	196	Merritt Group ^{nb}	USA	15,444,080	13,220,711	71	16.8%	16.8%
156	194	DCI	USA	15,425,485	11,790,071	60	30.8%	30.8%
157	150	Citypress	UK	15,125,000	14,175,000	110	6.7%	19.0%
158	146	Piabo PR	Germany	15,000,000	15,000,000	102	0.0%	0.0%
158	160	TRACCS	Saudi Arabia	15,000,000	13,200,000	220	13.6%	13.6%
160	222	Firehouse Strategies	USA	14,700,000	8,039,000	23	82.9%	82.9%
161	156	Hope&Glory	UK	14,641,000	14,985,000	87	-2.3%	9.0%
162		Race Communications	Brazil	14,445,337	13,491,945	49	7.1%	7.1%
163	158	BECG Group	UK	14,247,907	13,512,542	98	5.4%	17.6%
164	167	ORCA Agenturgruppe	Germany	13,610,400	11,639,400	110	16.9%	24.6%
165	171	Apple Tree Communications ^{nb}	Spain	13,261,075	11,286,570	105	17.5%	25.2%
166	173	Monet + Associes	France	12,840,000	11,217,600	120	14.5%	22.0%
167	192	Axon Communications	UK	12,600,000	9,824,000	104	28.3%	28.3%
168		Oy SEK Ab	Finland	12,519,000	11,697,540	124	7.0%	14.0%
169	175	Aspectus	UK	12,463,000	11,022,750	85	13.1%	26.1%
170	168	Tact Conseil	Canada	12,344,000	12,126,000	88	1.8%	1.8%
171	149	Clarity ^{nb}	UK	12,085,778	11,875,150	116	1.8%	1.8%
172	169	Davies	USA	11,985,000	11,500,000	30	4.2%	4.2%
173	181	Moore Inc	USA	11,847,168	10,646,366	46	11.3%	11.3%
174	165	Markenzeichen	Germany	11,791,400	12,084,000	87	-2.4%	4.0%
175	161	Wellcom	France	11,770,000	12,540,000	120	-6.1%	0.0%
176	174	MP&F Public Relations	USA	11,746,224	11,047,861	75	6.3%	6.3%
177	209	MMGY NJF ^{nb}	USA	11,590,142	8,993,878	50	28.9%	28.9%
178	170	Harvard	UK	11,584,369	11,488,094	99	0.8%	12.5%
179	177	Haebmau	Germany	11,427,600	10,841,400	125	5.4%	12.3%
180	193	Sam Brown	USA	11,400,000	9,741,816	53	17.0%	17.0%
181	186	Verge Scientific Communications	USA	11,380,000	10,500,000	35	8.4%	8.4%
182	176	Action Global Communications	Cyprus	11,100,000	10,900,000	187	1.8%	1.8%
183	182	Racepoint Global	USA	11,030,000	10,360,353	51	6.5%	6.5%
184	199	PLMR ^{nb}	UK	11,029,760	9,223,648	92	19.6%	33.4%
185	188	360PR+ ^{nb}	USA	11,000,000	10,050,300	62	9.4%	9.4%
185	232	Pierpont Communications	USA	11,000,000	7,385,651	31	48.9%	48.9%
185	186	ROKK Solutions	USA	11,000,000	10,100,000	40	8.9%	8.9%
188	207	komm.passion	Germany	10,978,200	9,017,400	75	21.7%	29.7%
189	261	Sandpiper	Hong Kong	10,958,000	6,018,105	115	82.1%	82.1%
190	234	Infinite Global	USA	10,855,627	9,404,824	66	15.4%	15.4%
191	183	Lift World	Portugal	10,700,000	10,260,000	120	4.3%	11.1%
192		Try Råd	Norway	10,485,102	10,296,724	85	1.8%	12.8%
193	163	Narva Communication AB	Sweden	10,175,900	12,583,560	58	-19.1%	-11.0%
194	202	Greentarget Global Group	USA	9,945,600	9,124,200	48	9.0%	9.0%
195	219	90TEN	UK	9,922,000	9,791,550	44	1.3%	13.1%
195	180	Octopus Group	UK	9,922,000	10,665,000	76	-7.0%	3.8%
197	179	Styleheads	Germany	9,876,100	10,773,000	123	-8.3%	-2.3%
198	358	INK Communications Co.	USA	9,770,106	6,940,057	52	40.8%	40.8%
199	n/a	Nelson Bostock Group ^{nb}	UK	9,746,200	11,796,451	81	-17.4%	-7.8%
200	214	Madano Partnership	UK	9,680,000	8,505,000	55	13.8%	27.0%

PROVOKE TOP 250 RANKINGS



2023 RANK	2022 RANK	AGENCY	HQ	FEE INCOME 2023 (\$)	FEE INCOME 2021 (\$)	STAFF	GROWTH vs 2021 (USD)	GROWTH (CONSTANT CURRENCY)
200	184	Threepipe Communications	UK	9,680,000	10,125,000	80	-4.4%	6.7%
202	197	Segmenta Communications	Germany	9,640,700	9,393,600	102	2.6%	9.3%
203	211	Navos	Germany	9,523,000	8,664,000	76	9.9%	17.1%
204	198	Clyde Group	USA	9,500,000	9,306,754	52	2.1%	2.1%
204	206	Grupo CDI	Brazil	9,500,000	9,036,000	235	5.1%	-0.4%
206	213	Dukas Linden Public Relations	USA	9,368,539	8,510,029	32	10.1%	10.1%
207	n/a	Hahm Shout Global	Seoul, South Korea	9,341,200	7,003,700	80	33.4%	33.4%
208	225	Urban Grupo de Comunicacion	Argentina	9,302,066	8,599,685	125	8.2%	8.2%
209	205	Taylor Herring	UK	9,075,000	9,045,000	45	0.3%	11.9%
210	218	Lou Hammond Group	USA	9,068,858	8,328,815	40	8.9%	8.9%
211	217	Berk Communications	USA	9,000,000	8,487,507	28	6.0%	6.0%
212	238	Approach	Brazil	8,930,000	7,020,000	202	27.2%	20.5%
213	212	SourceCode Communications	USA	8,831,000	8,475,000	35	4.2%	4.2%
214	249	Circle	UK	8,712,000	6,415,200	70	35.8%	51.5%
214	189	Good Relations	UK	8,712,000	10,029,150	57	-13.1%	-3.1%
216	239	The Romans	UK	8,627,300	7,560,000	81	14.1%	27.3%
217	204	LVT Group	Netherlands	8,560,000	9,120,000	75	-6.1%	0.0%
218	203	SenateSHJ	New Zealand	8,500,480	8,784,102	49	-3.2%	3.9%
219	210	Hot Paper Lantern	USA	8,500,000	8,900,000	31	-4.5%	-4.5%
220	228	Trigger Oslo	Norway	8,483,531	7,617,227	46	11.4%	23.4%
221	228	LHLK	Germany	8,281,800	7,410,000	70	11.8%	19.1%
222	200	PrettyGreen	UK	7,865,000	9,180,000	37	-14.3%	-4.4%
223	n/a	PB3C	Germany	7,714,700	7,159,200	63	7.8%	14.8%
224	250	Global Gateway Advisors	USA	7,700,000	6,400,000	24	20.3%	20.3%
224	235	Trevelino/Keller	USA	7,700,000	7,100,000	38	8.5%	8.5%
226	n/a	Fiona Hutton & Associates	USA	7,668,627	6,024,082	24	27.3%	27.3%
227	220	Red Lorry Yellow Lorry	UK	7,623,000	8,100,000	50	-5.9%	5.0%
228	245	Value 360 Communications	India	7,595,278	6,721,416	300	13.0%	13.0%
229	227	Utopia Lab	Italy	7,555,609	7,486,353	66	0.9%	7.5%
230	n/a	WA Communications	UK	7,435,450	7,735,500	60	-3.9%	7.2%
231	224	Jeschenko MedienAgentur	Germany	7,404,400	7,809,000	36	-5.2%	1.0%
232	247	The Academy	UK	7,381,000	6,345,000	49	16.3%	29.8%
233	358	Rowland	Australia	7,308,368	6,064,065	43	20.5%	29.4%
234	n/a	The 10 Group	UK	7,237,313	8,029,909	29	-9.9%	0.6%
235	235	Mower	USA	7,192,997	7,173,444	28	0.3%	0.3%
236	n/a	London Communications Agency	UK	7,083,288	6,877,462	59	3.0%	14.9%
237	n/a	Sachs Media	USA	7,068,660	6,305,304	36	12.1%	12.1%
238	264	CCgroup	UK	7,042,200	5,817,562	47	21.1%	35.1%
239	n/a	Splendid Communications nb	UK	7,025,582	6,200,550	67	13.3%	26.4%
240	266	Sassy	UK	7,018,000	5,805,000	35	20.9%	34.9%
241	295	Caliber Corporate Advisers	USA	6,966,792	4,488,556	29	55.2%	55.2%
242	228	Kaltwasser Kommunikation	Germany	6,955,000	7,410,000	59	-6.1%	0.0%
243	244	Whyte Corporate Affairs	Belgium	6,863,515	6,773,880	38	1.3%	8.0%
244	233	CP/partner	Germany	6,848,000	7,375,800	68	-7.2%	-1.1%
244	241	Fink & Fuchs AG	Germany	6,848,000	6,874,200	56	-0.4%	6.1%
246	266	Clockwork	South Africa	6,776,000	6,068,250	128	11.7%	24.6%
247	257	Klenk & Hoursch	Germany	6,736,720	5,987,280	66	12.5%	19.9%
248	281	Singer Associates	USA	6,714,990	4,771,127	19	40.7%	40.7%
249	263	Schwartz Public Relations	Germany	6,698,200	5,851,620	34	14.5%	22.0%
250	n/a	Ascend Agency	USA	6,635,629	2,427,368	10	173.4%	173.4%
251	288	Vero	Thailand	6,552,205	4,464,341	140	46.8%	46.8%



GLOBAL RESULTS

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

268 PR professionals were surveyed from the following regions::

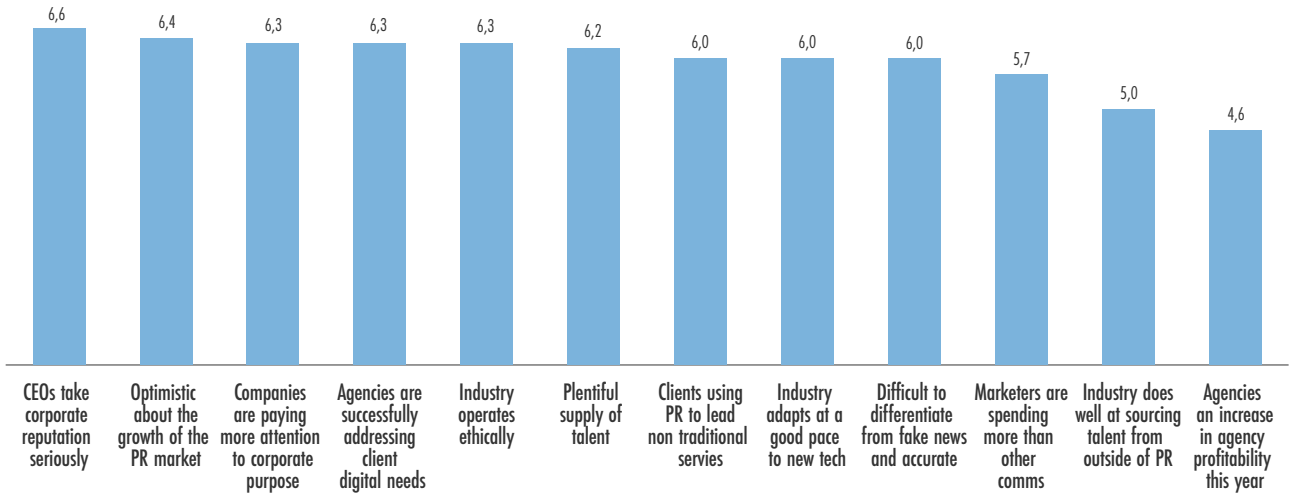
Africa
Asia-Pacific
Eastern Europe
Western Europe

United Kingdom
North America *
Latin America *
Middle East *

*Sample sizes between 20-30 participants

GROWTH AND OPPORTUNITY

Perceived growth and opportunity



Base: All who work in PR (291)Q1.

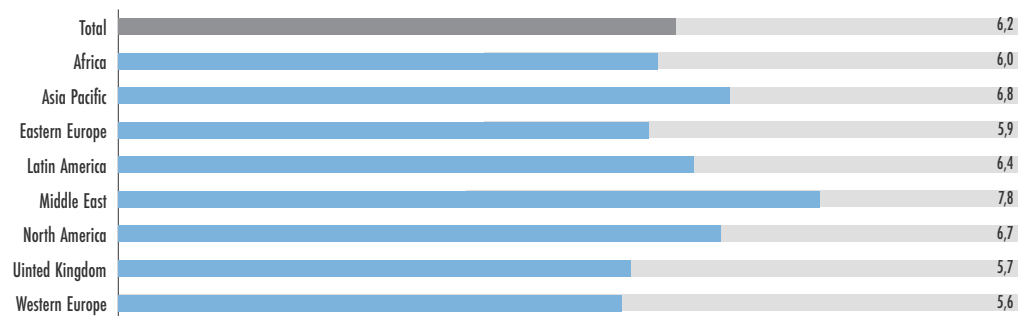
"Tell us how much you agree with these statements as they relate to on a scale of 1 to 10, where 1 = strong disagreement and 10 = strong agreement."

Average levels of agreement on a 10 point scale

I am optimistic about the growth of the public relations market

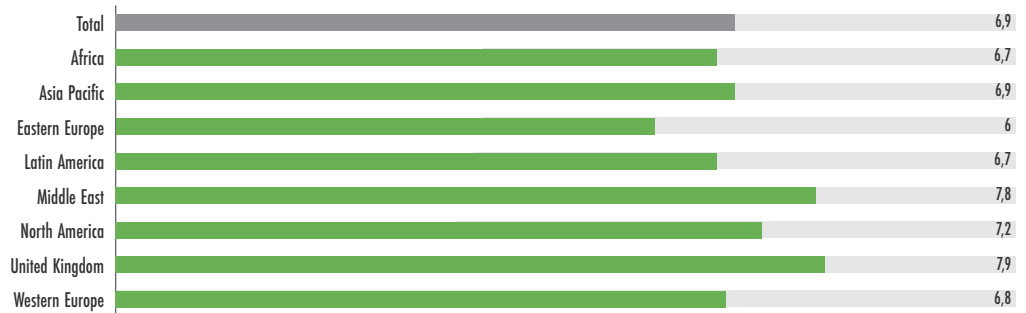


Expect an increase in agency profitability this year

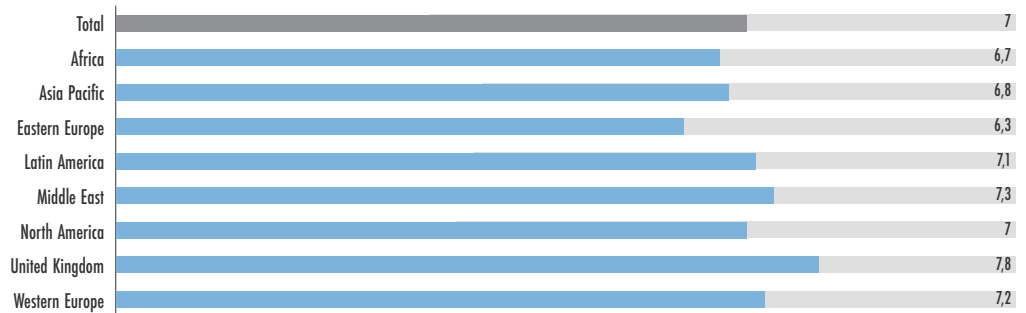


GROWTH AND OPPORTUNITY

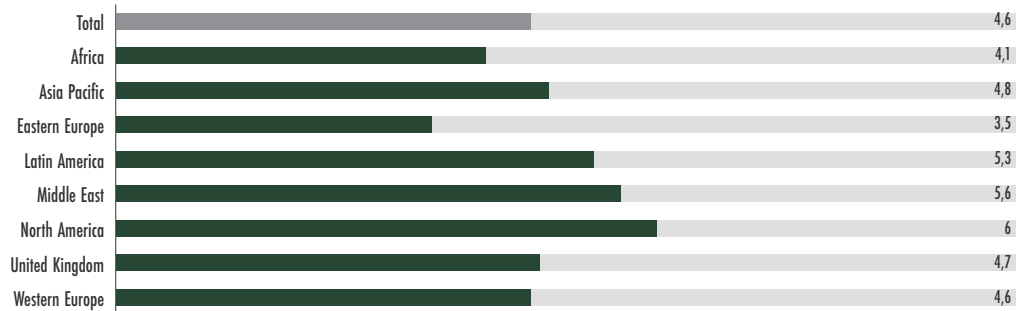
Corporate CEOs take corporate reputation seriously



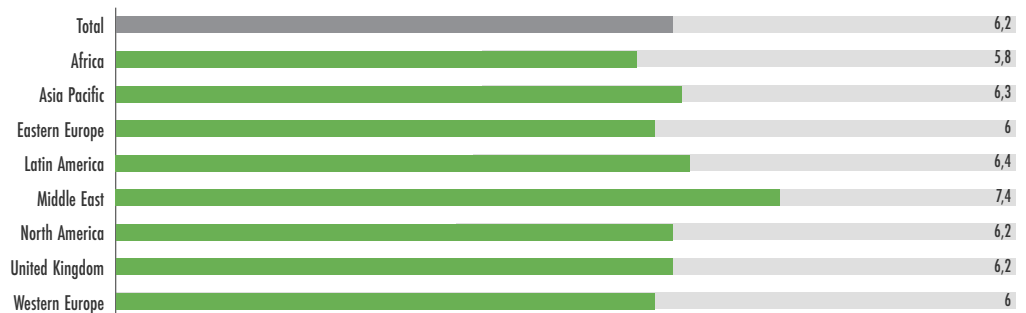
Companies are paying more attention to corporate purpose



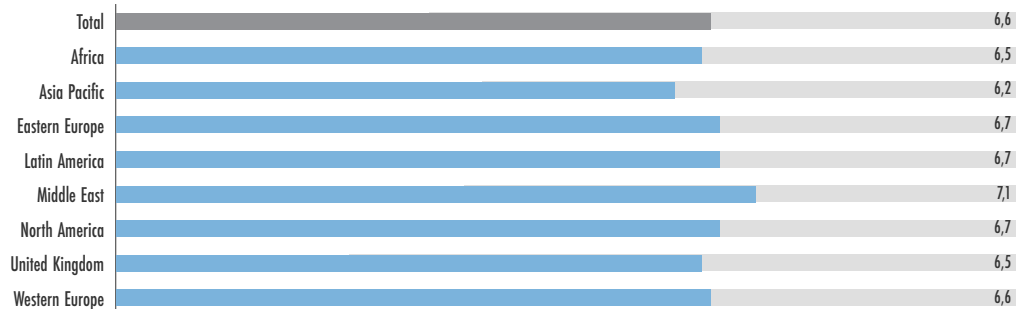
Marketers are spending more money in comparison to other communications disciplines



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



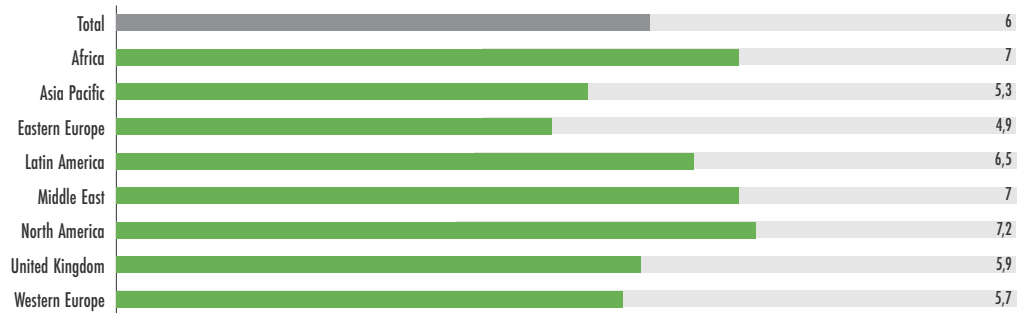
PR agencies are successfully addressing client digital needs



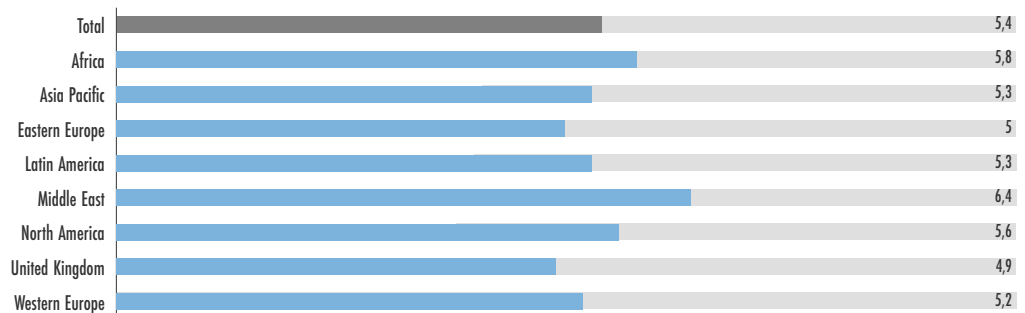
Participants indicated how much they agreed with each statements, in relation to their market, on a scale of 1 to 10, where 1 = strong disagreement and 10 = strong agreement

GROWTH AND OPPORTUNITY

There is a plentiful supply of talent



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



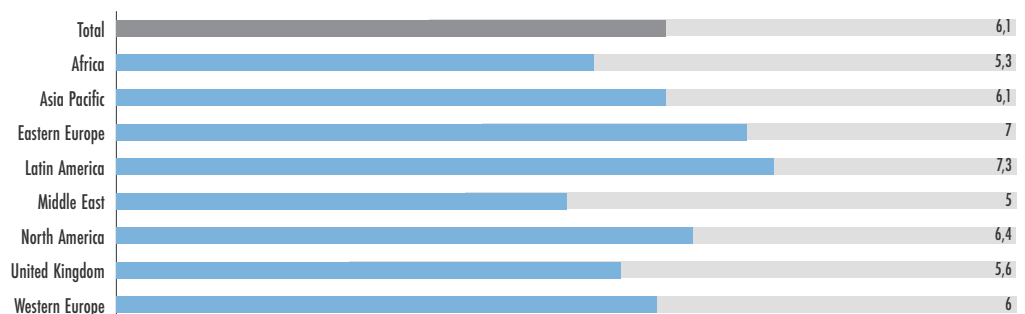
The PR industry is adapting to new technologies at an appropriate pace



The PR industry in 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



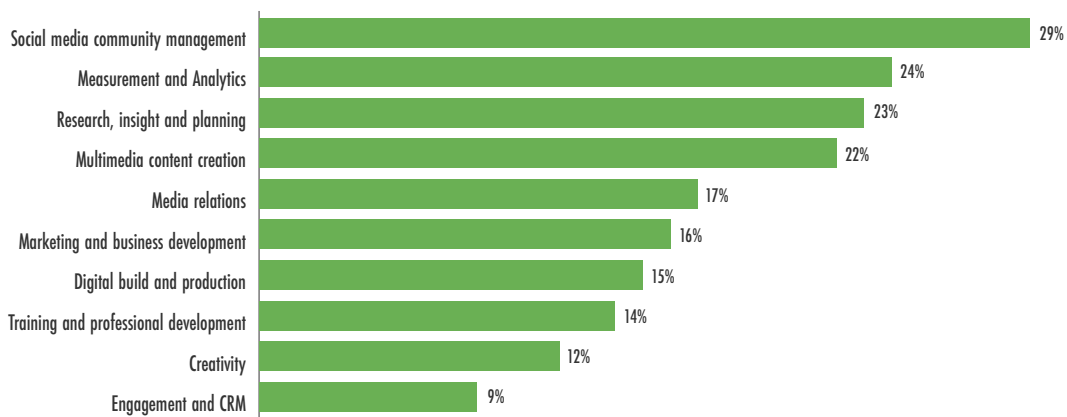
ESG
49%



Influencers communications 29 %



Strategic consulting 29 %



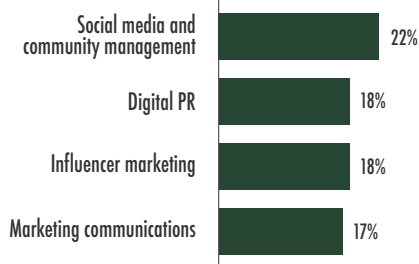
Areas of growth - last year



Corporate reputation 36%



Strategic consulting 29%



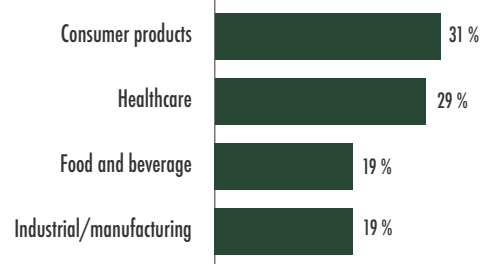
Sectors of growth - last year



Technology 46%



Financial and professional services 35%



GROWTH AND OPPORTUNITY

Expected areas of growth



Strategic consulting 47%



Corporate reputation 40%



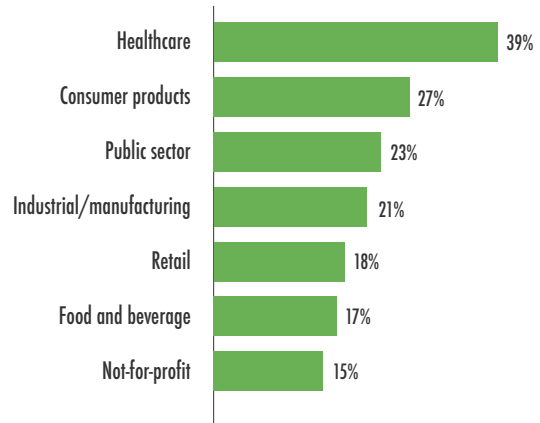
Expected sectors of growth



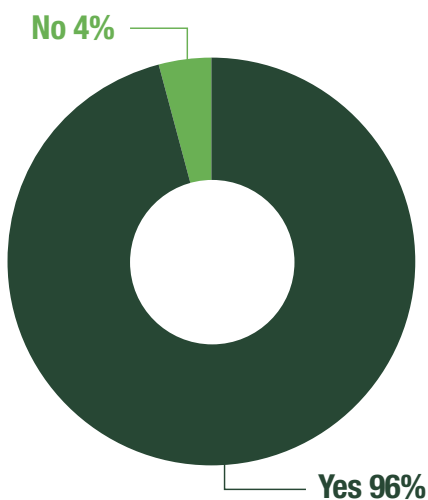
IT and technology 49%



Financial and professional services 40%



Organisations expecting to grow in the next 5 years



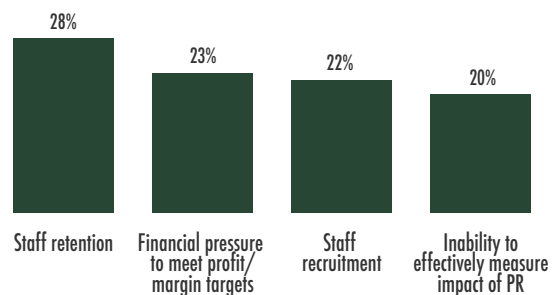
Greatest challenges for the PR firms in the next 12 months



Clients unwilling to commit sufficient funds 42%

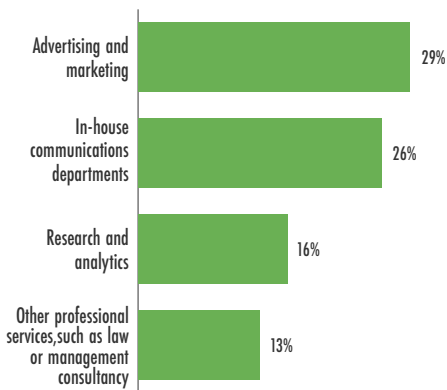
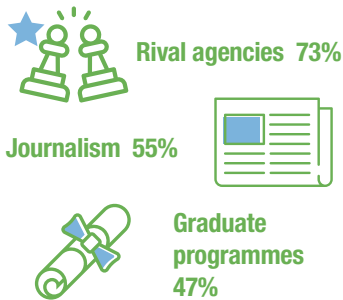


Economic conditions generally 42%

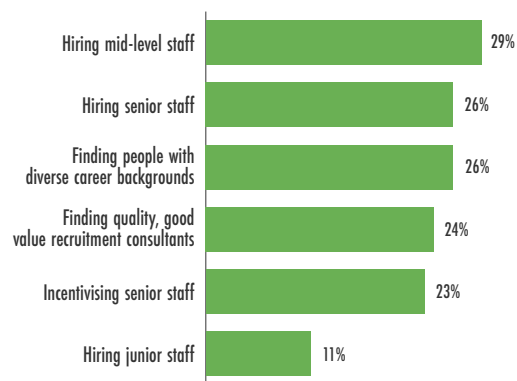


TALENT AND CHALLENGES

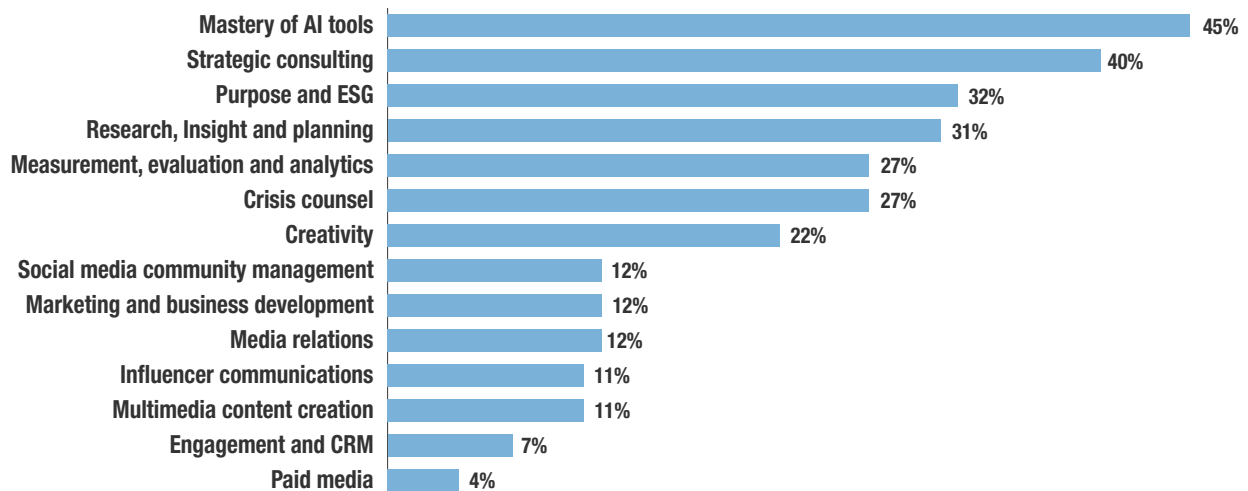
Expecting to source talent from



Talent strategy challenges



Future talent relevant skill sets



TALENT AND CHALLENGES



Rohan Shah,
MANAGING DIRECTOR,
REUBEN SINCLAIR

The Public Relations industry is on the cusp of profound transformation, driven by shifting landscapes, emerging technologies, and evolving societal expectations. In this dynamic environment, PR agencies worldwide are grappling with talent challenges that carry substantial implications for the industry's future. Insights from the data collected in this report shed light on these challenges and the critical skill sets that will shape the PR landscape in the coming years.

The paramount talent challenge, as highlighted by 60% of PR agency leaders, revolves around retaining key talent. This underscores the pivotal role experienced professionals play in the industry. It signals a pressing need for PR agencies to prioritise the satisfaction and engagement of these individuals.

Key strategies, such as mentorship programs, professional and personal development opportunities, and fostering inclusive work cultures, are imperative. Retaining seasoned and key personnel not only preserves institutional knowledge but also fosters stability and sustained growth within PR agencies.

The second most critical talent challenge, as recognized by 33% of survey respondents, centers on motivating younger executives. The future of the PR industry rests in the hands of these emerging leaders, emphasizing the urgency for agencies to provide the strategies mentioned above but also to create work environments that inspire the next generation of PR professionals. Engaging and nurturing the passion of younger executives is vital for sustaining the industry's vitality and fostering innovation.

Concurrently, 32% of PR agency leaders identify the development of junior and mid-level staff as a challenge. This statistic underscores the need for structured training and development and mentorship programs within PR agencies. The success and growth of an agency hinge on its ability to cultivate junior and mid-level staff for future leadership roles, ensuring a robust and sustainable workforce.

In addressing these talent challenges, it is equally critical to consider the skill sets that will be most relevant for PR executives in the next decade.



TALENT AND CHALLENGES

The response data highlights the essential skills that PR professionals must cultivate to thrive in this evolving landscape.

Mastery of AI tools, ranked at the top with 45%, underscores the industry's increasing reliance on artificial intelligence and data-driven decision-making. PR professionals must adeptly embrace AI tools to remain competitive, leveraging automation for tasks, data analysis enhancements, and personalised communication.

Strategic consulting, noted by 40% of respondents, is of paramount importance as PR strategies grow increasingly complex and integrated with broader business objectives. PR executives must excel in strategic planning to offer effective guidance to clients.

The third-highest-rated skill set, recognized by 32% of respondents, pertains to purpose and Environmental, Social, and Governance (ESG) communication. This underlines the industry's shift towards socially responsible communication, with PR executives needing expertise in articulating an organisation's commitment to ethical and sustainable practices.

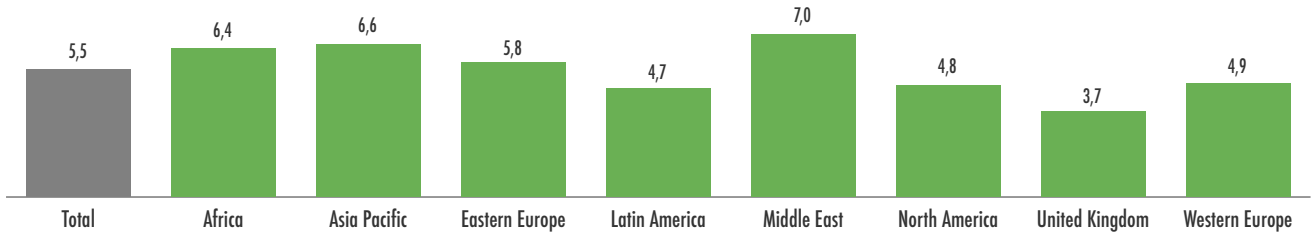
In the coming years, PR agencies must carefully balance the retention of key talent with the development of essential skill sets demanded by an evolving landscape. Strategies focusing on retaining experienced professionals and engaging and motivating younger executives are of paramount importance.

Simultaneously, PR executives must adapt by mastering AI tools, excelling in strategic consulting, and embracing purpose-driven communication to remain at the forefront of an industry in transition. Agencies that effectively navigate these dual challenges will be best positioned for success in this evolving and dynamic world of PR.



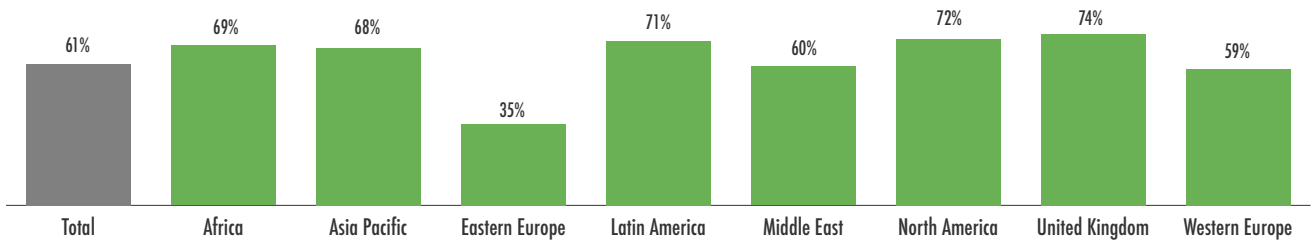
DIVERSITY AND INCLUSION

Diversity - reflecting ethnicity demographics by region

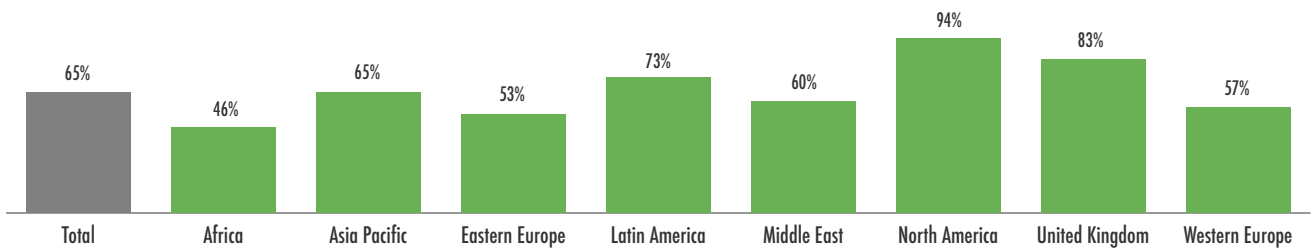


Respondent indicated whether their workforce was representative of their local ethnicity demographics

% of firms that have a diversity and inclusion policy



% of firms that have a dedicated person responsible for D&I



DIVERSITY AND INCLUSION



Ishtar Schneider

FPRIA, GLOBAL PEOPLE, INCLUSION & DIVERSITY COMMS LEAD, MARS

Three years on from the racial injustice and societal unrest galvanized by George Floyd's senseless killing in the US in 2020 and diversity, equity and inclusion seemed to harnessing long-needed advocacy and attention. As we know, systemic change takes sustained effort over time. Yet in the face of increasing global economic headwinds there are signs businesses have begun to deprioritise diversity, equity and inclusion efforts with data showing progress on gender equity and ethnically diverse leadership in markets like the UK has stagnated. But how does the PR industry stack up?

Data from the latest ICCO World PR Report paints a mixed picture of inclusion and diversity progress for PR around the globe.

The UK scored the lowest (3.7) of all measured regions/hub when asked if they think the diversity of people working in PR in your region is reflective of the ethnic demographics of the population. European countries scored just above and just below the average of 5.5 with Western Europe only scoring 4.9 out of 10 and Eastern Europe 5.8 of 10. Compare this to countries in the Middle East (7.0 of 10) or Asia-Pacific (6.6 of 10) which scored highest, and it begs the question **'what are these regions getting right and what are others like the UK, North America (4.8 of 10) and Latin America (4.7 of 10) still missing'?**

Regional and local contexts are incredibly important to consider alongside these results – so while PR leaders in regions like Eastern European might be highly reflective of the communities they serve – this may be influenced by the levels of ethnic diversity in those regions and also isn't necessarily reflective of an inclusive culture by default.

The report also looked at how many companies are putting the right policies in place and the results here seem to flip-flop. When asked about whether their organisations have an existing diversity and inclusion policy – the UK (74%), North America (72%) and Latin (71%) America all scored

highest with more than 7 in 10 of those surveyed responding yes – while the Middle East and Asia-Pacific landed further down with 60% and 68% respectively.

And when asked whether there is a specific person who is responsible for diversity and inclusion in their company who has been trained in I&D issues – again those three came out on top – with 94% of respondents in North America, 83% in the UK and 73% in Latin America reporting yes. Contrast this only around 6 in 10 in the Middle East (60%) and Asia Pacific (65%), even less in Europe (53% Eastern Europe / 57% Western Europe) and the least in Africa – with only 46% of respondents reporting this dedicated talent.

What does that indicate? Let me just say I don't think that's a carte blanche to say dedicated resource and DEI policies are having the opposite effect we want. **It's critical to remember that policies alone don't move the needle.** And it's promising to see that geographies that have the most work to do around to reflect the communities around them, acting to put relevant policies in place. But that's step one, and the best policy is only words on a page without the appropriate and ongoing measurement, reporting and governance to enact change. We know employees – and future talent (particularly younger generations) – expect a level of transparency on where organisations are in their diversity journey and want to see tangible action and progress.

DIVERSITY AND INCLUSION

A policy alone isn't good enough. I'd love to see a question in next year's report in the measurement section on how many organisations have these tools in place.

While many themes across diversity and inclusion cut across industries, it's critical to remember that your specific data matters. It's not until you have the right information to critically assess where your gaps are, what's working well and what is driving your issues across different aspects of diversity– that you can put the right levers in place to move the needle. As PR people, we love a campaign or a moment in time – and we need to collectively unlearn those habits when it comes to tackling diversity and inclusion.

On the people side, while I think it's important for there to be specific talent resourced to help facilitate DEI programmes, policies, measurement and governance and it's positive to see this being put in place across the regions – diversity and inclusion is a key part of building a working healthy culture, workforce and workplace, and therefore needs to be something everyone takes accountability for – not just those with it in their job title.

Diversity and inclusion is a key part of building a working healthy culture, workforce and workplace.

Equity is a challenge involving all of us – I feel strongly that gender equity isn't a woman's issue to be solved by women alone, disability isn't an issue to be solved by those who are disabled alone and ethnic disparities can't and won't be solved by those from these minority communities alone. Clearly there is also room to make the case for more dedicated resource in regions where this doesn't yet exist.

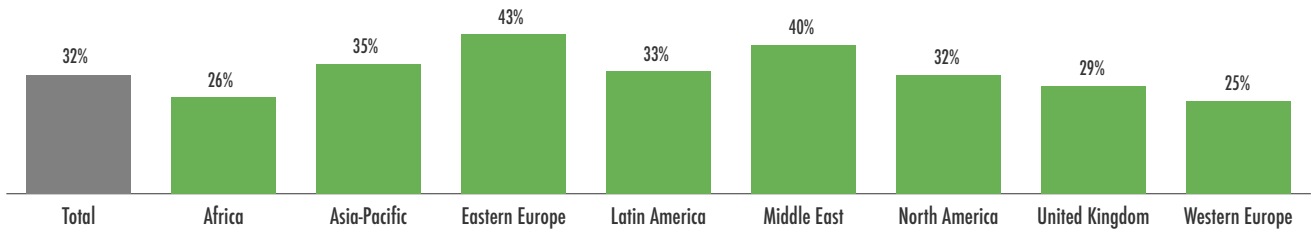
We also know by 2025, Gen Z will make up more than a quarter of the workforce in OECD countries. These employees are expecting more when it comes to sustainability, wellbeing and yes, diversity and inclusion. As the ICCO report also highlights, retaining key talent, motivating younger executives and developing junior and mid-level staff are the biggest talent strategy challenges facing PR leaders today – so it's time to move beyond policies to holistic support, leader role-modelling, supportive and empowered networks and development programmes that bring those policies to life.

And with the likes of McKinsey and Gartner both reporting talent as a top organisational priority for CEOs – I would argue that intrinsically means diversity and inclusion should be a top priority for business and the PR industry as well. In the face of an increasingly diverse and multigenerational workforce, you can't land one without the other.

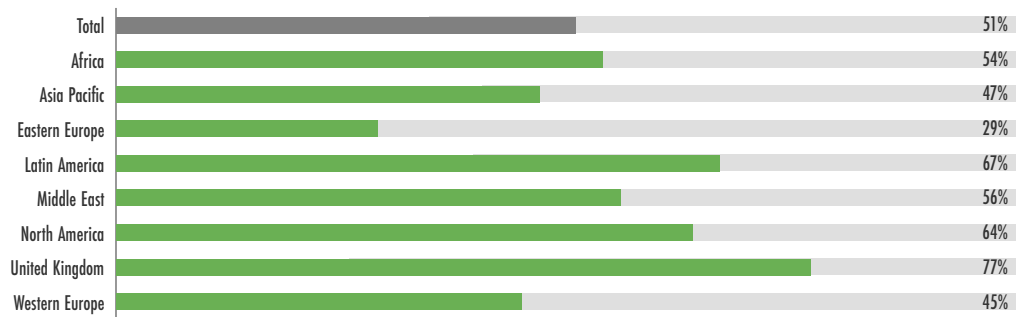


MENTAL WELLBEING IN THE WORKPLACE

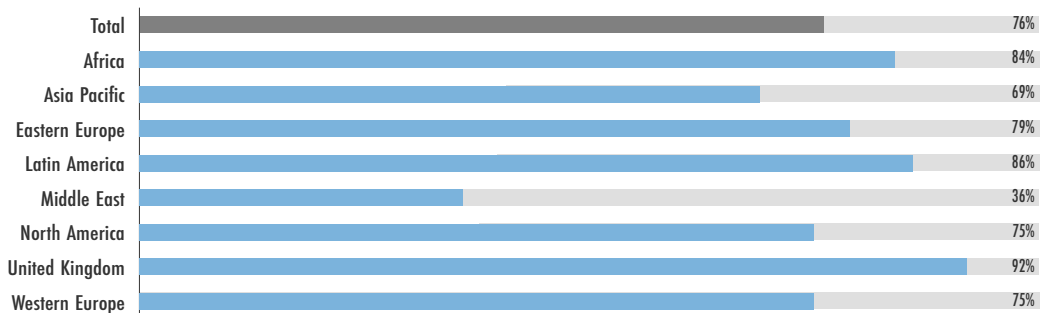
% of respondents that have experienced mental health problems in the last 12 months



% 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

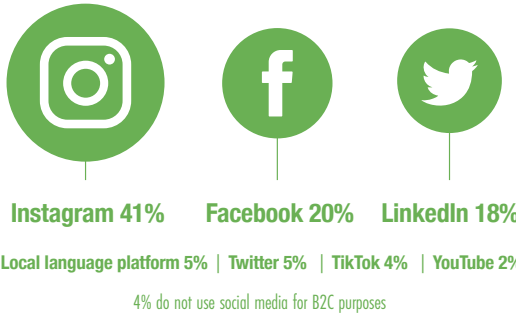


% that agree mental health support from their organisation has improved over the last 12 months

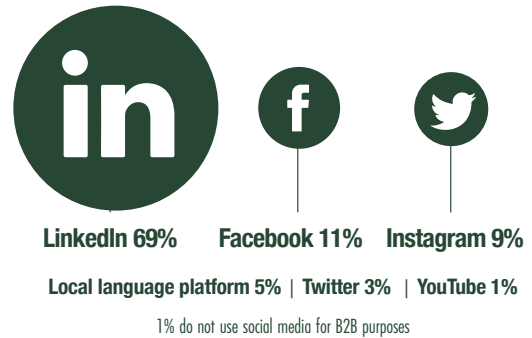


DIGITAL TRENDS

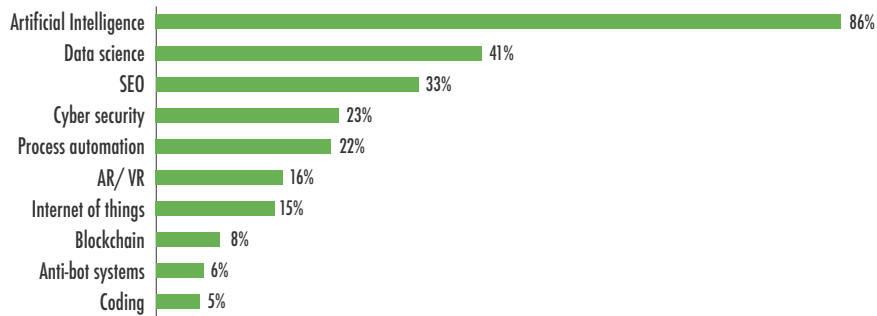
Most used B2C Social media platform



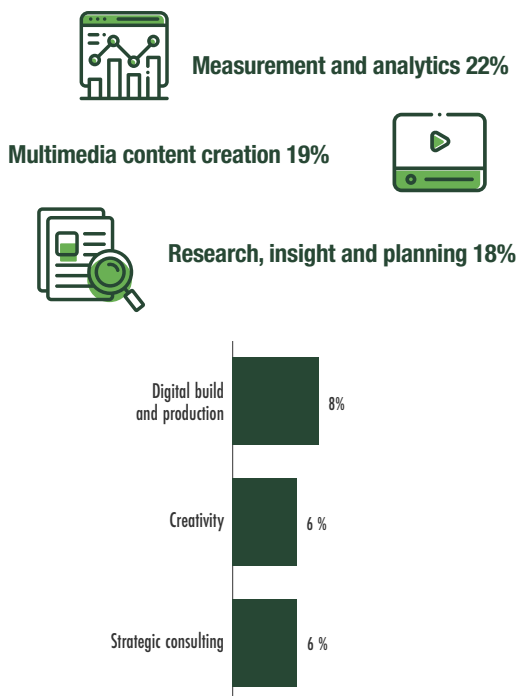
Most used B2B Social media platform



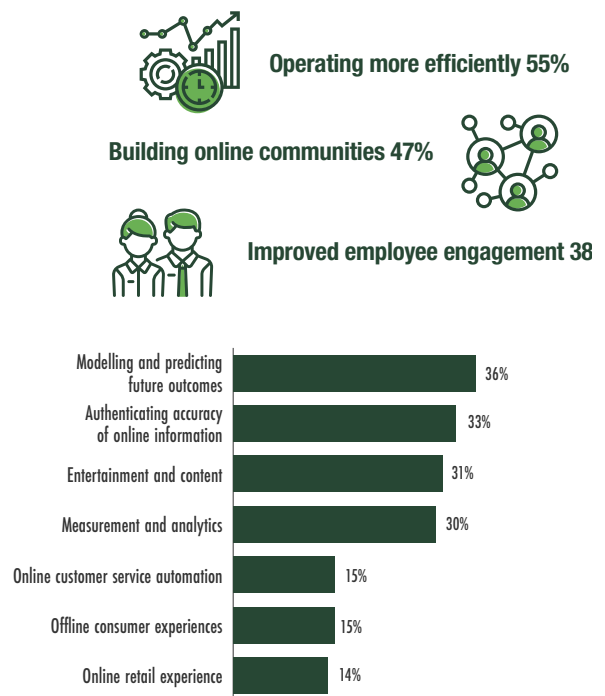
Most relevant technologies – future prediction



Areas of PR in which tech predicted to have greatest impact

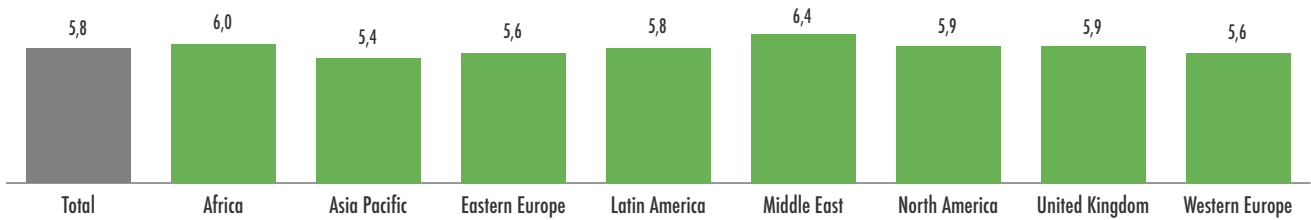


Prediction of important future tech applications within businesses



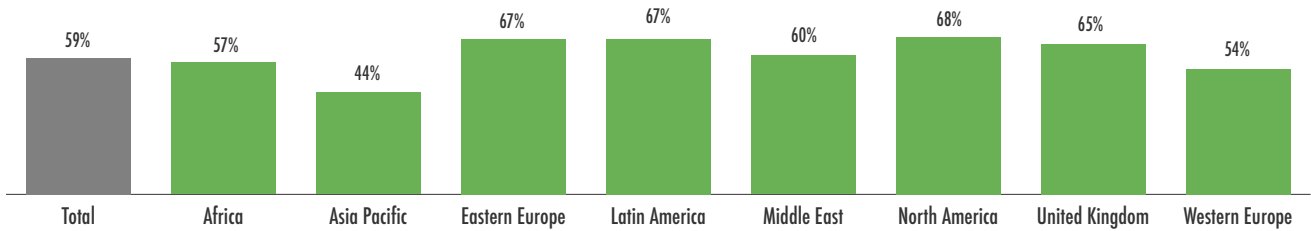
DIGITAL TRENDS

Rating of adoption of new technology by regions

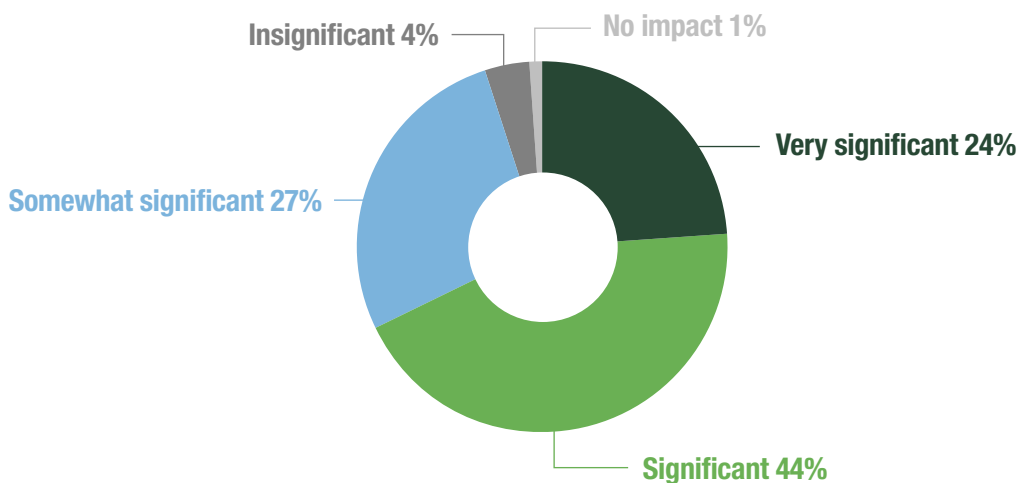


Respondent indicated whether their workforce was representative of their local ethnicity demographics

% that have integrated AI tools into their everyday processes

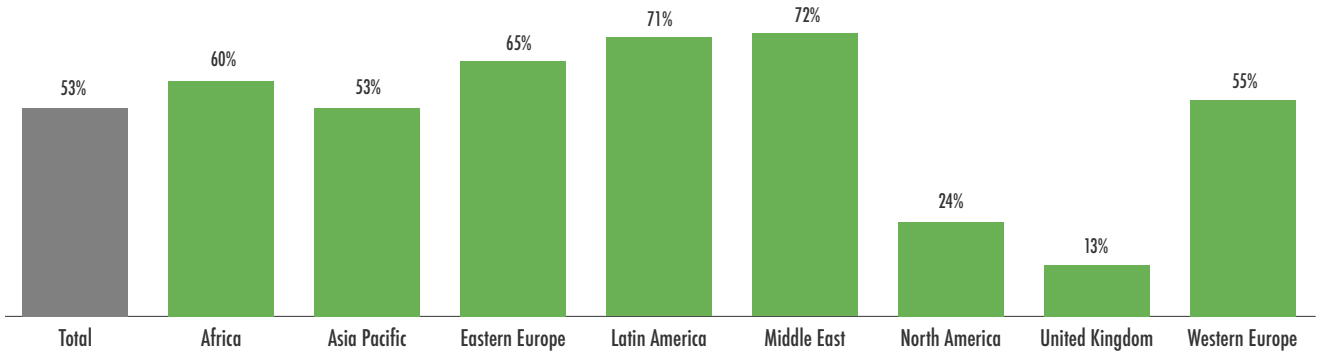


Perceived impact that AI tools will have on the PR industry

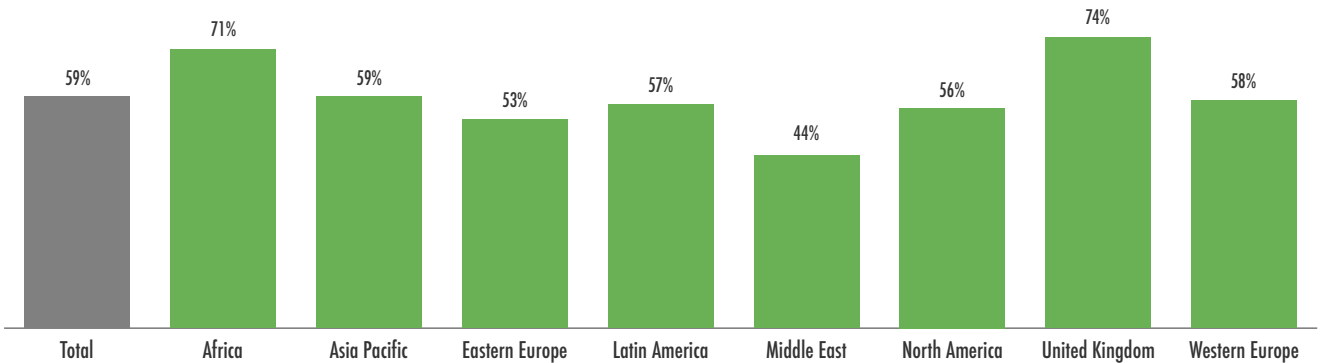


MEASUREMENT AND EVALUATION

Use of AVE by region



Use AMEC



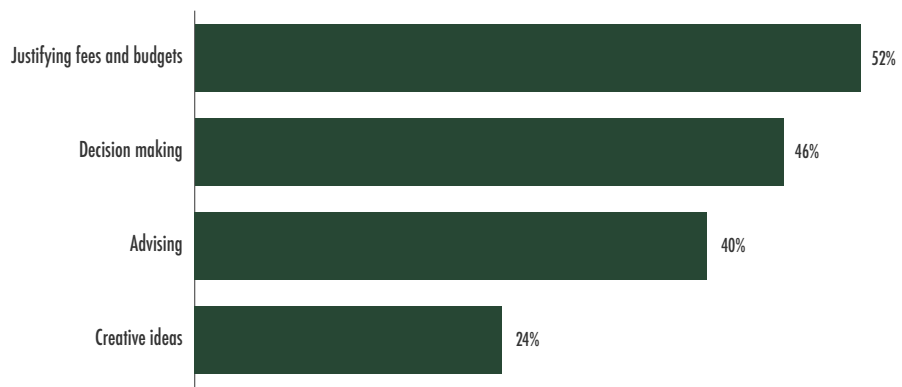
What measurement and evaluation metrics are most used for



Reporting 82%



Planning 53%





Richard Bagnall

CO-MANAGING PARTNER AND CEO EUROPE
AND THE AMERICAS, CARMA

As we look back over another challenging year, we can see that in many ways the more things have changed, the more they have stayed the same. The PR and comms industry, much like the rest of the world, has faced its fair share of upheavals. Yet, as we thumb through the pages of the latest ICCO report, it's a case of déjà vu with the numbers telling a familiar tale.

AVEs, that discredited metric which needs to be of a bygone era, have remained surprisingly tenacious. In the UK, they are in their final death spiral with only 13% still reporting their use. But as we look across the globe, their sinister presence looms larger—24% in North America, over half in APAC and Western Europe, and increasing to over 70% reporting their use in Latin America and the Middle East.

Let's remind ourselves that this is an internationally acknowledged invalid metric – a false number – and it has no place in our reporting. Their remaining use is a stark reminder that old habits die hard and emphasises the need for us all to work harder to prevent a two speed international industry developing.

On a brighter note, AMEC's educational tools and resources continue to gain ground. An encouraging 60% of the global industry is now reporting that they use AMEC's excellent free resources which include the Barcelona Principles, Integrated Evaluation Framework and the Measurement Maturity Mapper. The UK is striding ahead with 74%, and Africa is not far behind. Yet, we still see a drop off with other regions trailing in the 50s and lower, again pointing to a comms world not yet fully in sync.

Clients appear to be sending a somewhat confused message into the market place. The top three client objectives which they ask agencies to deliver against remain 'Improving corporate reputation' 'increasing sales' and 'building brand purpose' – all very clear desired organisational outcomes. Yet the metrics that are reported to be requesting show a disconnect - media clippings, engagement metrics, web traffic analytics, AVES and media summaries apparently being requested the

most frequently. I'm not sure that this is right – are they really being requested by our clients or are these what we are choosing to deliver? We must take a long hard look at this and make sure that when we are asked to measure the value of our work we choose metrics that demonstrate what we have achieved, and not just the activity metrics that just show what we have done.

Where we are using metrics, they are being put to work across the board: 82% for reporting, more than half for planning, and a good chunk for justifying fees and making decisions. It's a sign that we're trying to get savvier with our numbers, using them to steer the ship rather than just chart the course.

So here we are, hurtling rapidly towards another year, and we have a bit of a mixed picture. In some areas things are getting better, in others not so much. My message couldn't be clearer: it's high time for the industry to move on with its approach to the measurement and evaluation of its work.



MEASUREMENT AND EVALUATION

With global geopolitical uncertainty being the only certain thing, we can't afford to be seen as busy fools. We need to prove our worth, show our value, and make sure we're measuring what matters.

The tools are there, the best practices set and we have never had access to more resources and tools. It's up to us to step up and make the change and to do so consistently across the globe. Let's not just count what's easy to count, but measure what's valuable. It's not just about doing stuff; it's about demonstrating the impact of our work in terms of desired organisational objectives. And that's how we'll show the true value of PR and comms, not just to our clients, but to the world at large.



CLIENT REQUESTS

Most likely client requests



Media clippings 58%

Engagement metrics 47%



Advertising value equivalency (AVE) 34%

Web traffic analytics 34%



Media summaries 31%

Sentiment metrics 25%



Most important objectives for clients



Improve corporate reputation (proactive) 68%



Increased sales 49%



Building brand purpose 43%

Social issues clients are most likely to prioritise



Sustainability and environment 69%



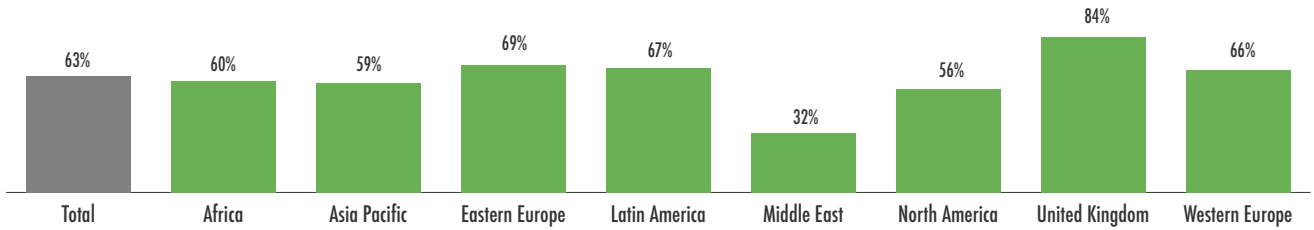
Diversity and social inclusion 38%



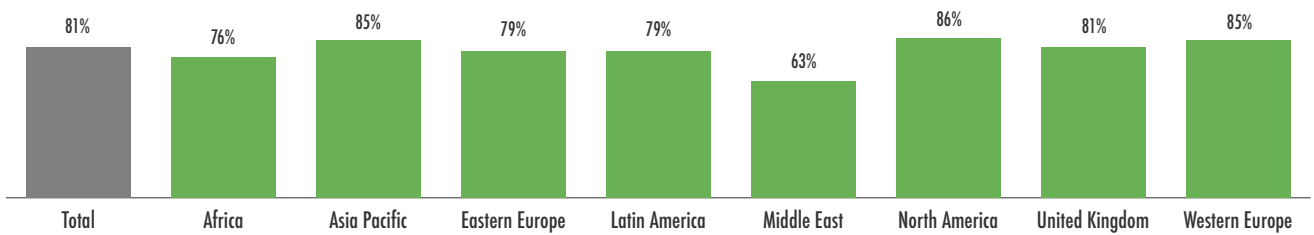
Education 26%

ETHICS IN THE INDUSTRY

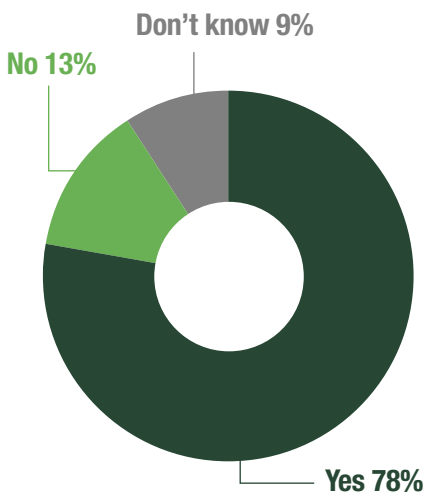
% by region of those signed up to a industry code of conduct



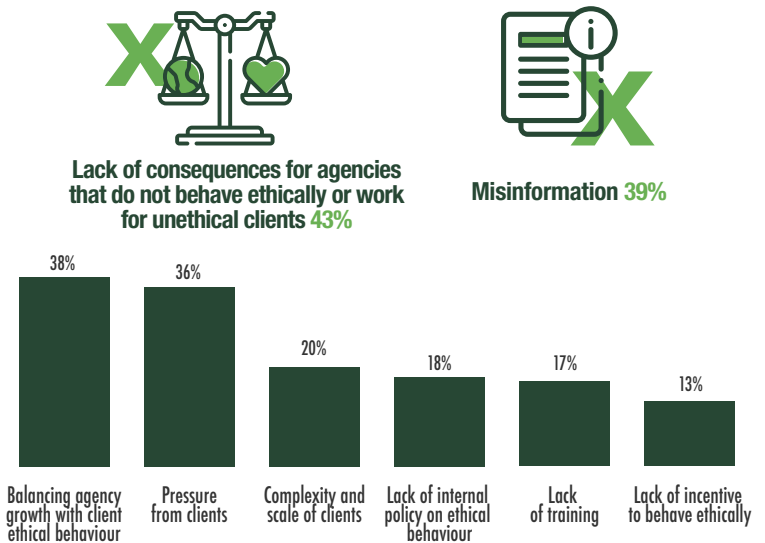
% by region of those know the guidelines they are signed up to well



Turned down a client or a job due to ethical reasons

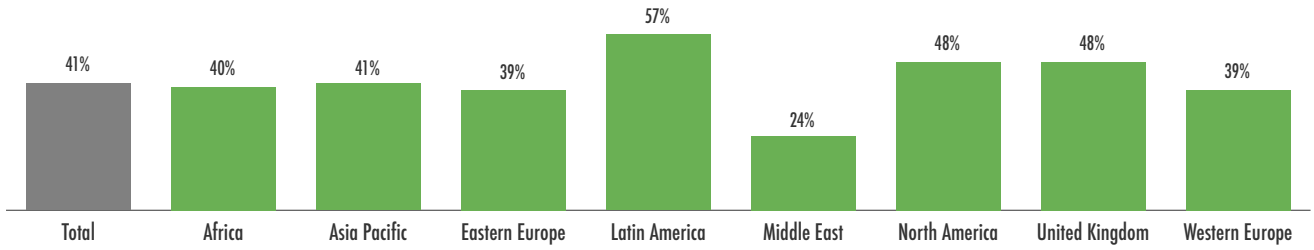


Greatest challenges for the PR firms in the next 12 months

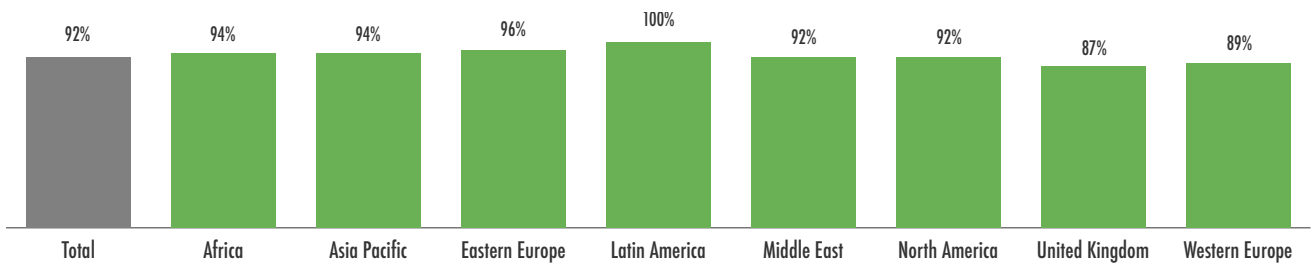


ETHICS IN THE INDUSTRY

% 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



TRUST OVER PROFIT: 78% OF PR AGENCIES DECLINE CLIENTS ON ETHICAL GROUNDS



Christina Forsgård

FOUNDER, NETPROFILE AND
ICCO ETHICS CHAIR

This report highlights the unwavering dedication of the Public Relations (PR) industry to ethical standards on a global scale. At its core, ethics is about maintaining integrity and doing what's right. It's clear that a significant portion of the PR world acknowledges this and strives for it. However, how this is embraced can vary, depending on the region.

In the current fast-paced information age, punctuated by the challenges of fake news and potential misinformation, the role of PR becomes even more pronounced. Earning trust isn't just a goal; it's the lifeline of the industry. Ethical behavior ensures this trust is built and maintained.

Impressively, a significant 63% of PR organizations globally have actively embraced a dedicated Code of Conduct.

Leading the way, the UK showcases exemplary dedication with a noteworthy 84% adoption rate. On the flip side, the Middle East, which stands at a 32% alignment rate, underscores the potential, and need for further ethical growth. This stark difference not only reflects the strength of ethical roots in established markets but also draws attention to the ongoing growth process in emerging regions.

Considering North America, it presents a unique scenario. While the official numbers, a mere 56%, indicate adherence to the Code of Conduct, a closer inspection paints a different picture. A robust 86% of its PR professionals have a clear understanding of the intricate nuances of ethical guidelines. This intriguing contrast suggests that even if the official commitment might appear modest, many professionals in the field are intrinsically motivated to act ethically, ensuring their daily operations and client interactions remain above board.

It's quite heartening to see that 78% of PR agencies, emphasizing ethical values, have opted to decline certain client offers or projects. This bold stance is a clear testament to the real-world impact of ethical considerations within the industry's operations. Such decisions highlight the industry's tangible dedication to values over profits.

Yet, the industry is not without its share of hurdles. A pressing concern is the lack of suitable

penalties for ethical missteps. The severe repercussions of tarnishing a brand's reputation, potentially to the point of its downfall, serves as a grim reminder of the high stakes. The proliferation of fake news, made even more challenging with the rise of advanced AI tools, complicates the landscape further.

Yet, there's a silver lining. A notable 41% of stakeholders in the PR domain believe they're setting a higher ethical benchmark compared to other sectors. This sentiment is particularly strong in regions like Latin America, which demonstrates a solid 57% approval rate, thereby emphasizing PR's role in fostering transparent and sincere communication.

A resounding 92% consensus from industry participants underscores the vital role PR agencies play in guiding their clients away from potentially ethically murky waters. This sentiment finds its strongest advocate in Latin America, where they have a unanimous agreement on this point.

While the PR sector's steadfast commitment to ethical principles is evident, it doesn't come without challenges. From ensuring accountability to mitigating the threats of misinformation, the road ahead is multifaceted. Yet, as the PR industry forges ahead, adapting to the ever-changing digital landscape, its ethical foundation will undoubtedly serve as a guiding light and most treasured asset.

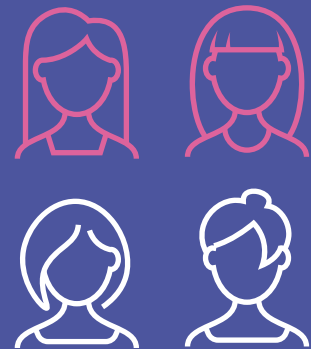
GLOBAL WOMEN IN PR - TOPLINE FINDINGS



Levels of **flexible working** have been maintained since this time last year and are anticipated to stay.



Flexible working is increasingly being seen in a positive light in the world of PR.

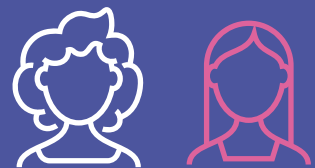


However women continue to see **progression and promotions slower than men**, and boardrooms continue to be male dominated, though we see small changes each year.

Half of female PR professionals have experienced harassment or inappropriate behaviour at work.



In-house teams continue to be behind agencies when it comes to **women in the boardrooms**.



Three in ten agency workers see themselves working in agency roles in their 50's.



With **under half** reporting the harassment to their employer



THE WORK ENVIRONMENT

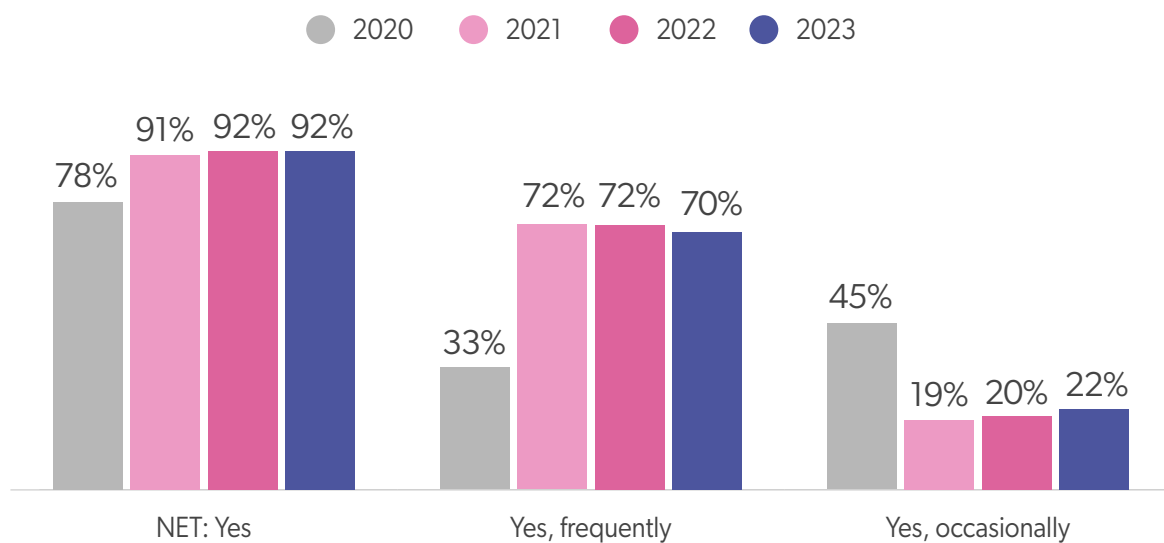
Flexible working remains in the workplace and is expected to stay following the adjustments during the pandemic. We are seeing further shifts in the perceptions of people who work flexibly, with fewer associating it with slower career progression indicating a positive shift in attitudes. There have been further increases in PR professionals reporting a positive perception by their company of the benefits of flexible working.

Flexible working practices are maintained post-pandemic and are anticipated to remain

We observed a significant increase in the number of PR professionals working flexibly as a result of the pandemic and it appears that flexible working is here to stay. Levels of flexible working have been maintained this year with the same amount (92%) currently working flexibly. In the next year we don't expect to see a change as 93% of PR professionals are expecting to work flexibly in the next year.



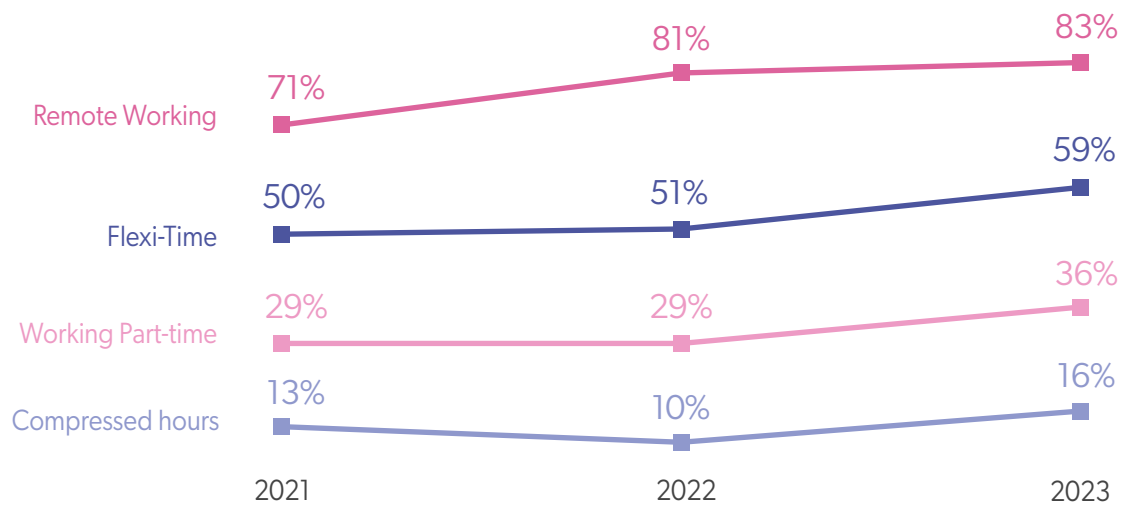
Flexible working



PR professionals expect to be working remotely for an average of 2.7 days a week, a slight drop in comparison to 2022 (3 days). Once again, we see a drop in those expecting to be working remotely full-time (5 days a week). 12% expect to do so over the next 12 months compared to 16% in 2022 and 21% in 2021, indicating that the workforce is moving back to the office at least some of the time.

When it comes to the opportunity for flexible working, we can see an increase in the number of PR professionals being offered remote working - now 83%, up from 81% in 2022 and 71% in 2021. The opportunity of working flexi-time (59% vs. 51% in 2022 vs. 50% in 2021) and part-time (36% vs. 29% in both 2022 and 2021) have both increased this year. The opportunity to work compressed hours increased from 2022, after a slight decline last year (16% vs. 10% in 2022 and 13% in 2021).

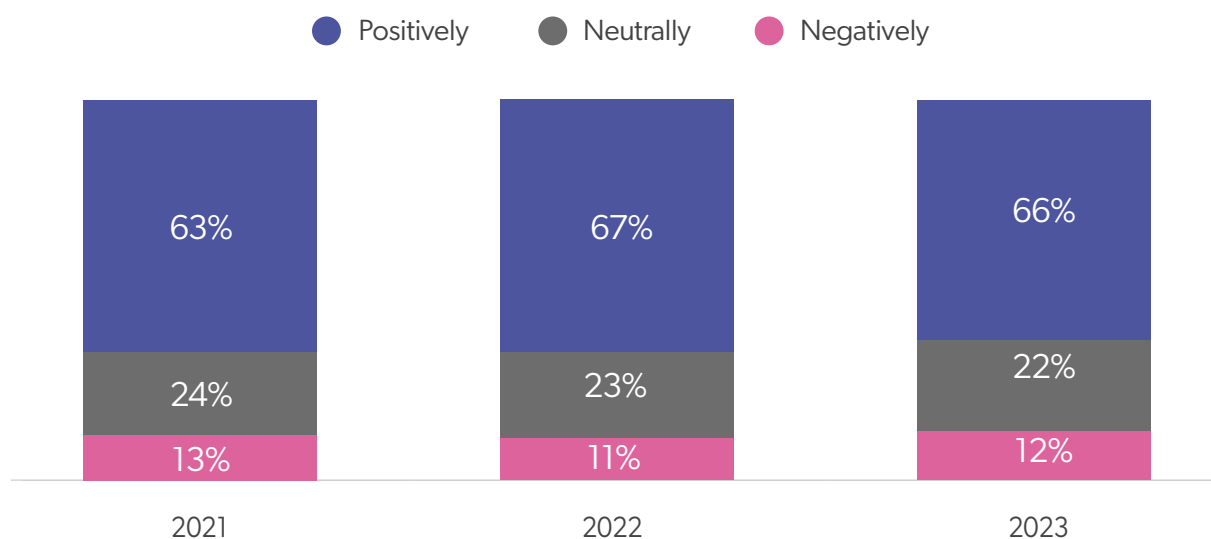
Flexible working offered by organisations in 2020, 2021 and 2022



Flexible working continues to be seen positively whilst the benefits remain recognised

Encouragingly, flexible working is increasingly being seen positively in the world of PR, particularly for women. We have continued to maintain a similar level of positive perception this year (66% vs. 67% in 2022). Interestingly, those working agency-side are more likely to report a positive perception (68%) to flexible working, compared to in-house (63%).

How is flexible working generally perceived at your company?



The benefits of working flexibly continue to be regarded positively amongst PR professionals. With regard to wellbeing, seven in ten (73%) feel it helps employees maintain their mental wellbeing and four fifths (81%) feel it helps maintain a healthy work-life balance, up from 77% in 2022. In addition, 77% think flexible working is a really good idea, the same amount as 2022.

Thinking specifically about the benefits for PR women, 73% believe flexible working allows women to have a family or take on caring responsibilities and still progress in their careers; up slightly from 71% last year. Whilst 73% agree that it helps retain female talent (increasing from 68% in 2022).

Over a third (35%) believe that flexible working helps women progress into the boardroom, a small increase from 33% last year.

Flexible working continues to be desired and an important consideration when making decisions about changing jobs, with four fifths (79%) saying they would be more likely to choose a job that offered flexible working over one that did not – up slightly from 78% last year.

This is a sample of some highlights from the Global Women in PR Annual Index.
For the full GWPR report, head to www.globalwpr.com



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. Social media & community management
3. Digital PR



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

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



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

1. ESG
2. Research, insight and planning
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. Economic conditions generally
2. Clients unwilling to commit sufficient funds
3. Staff retention



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

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



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

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



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

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



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

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

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. Public affairs / government relations



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. Research, insight and planning
2. ESG
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



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

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



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

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



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

1. Mastery of AI tools
2. Research, Insight and planning
3. Crisis counsel



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

1. Sustainability and climate change
2. Education
3. Mental health



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 & community management



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. ESG
2. Social media
3. Multimedia



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

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



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

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



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

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



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

1. Mastery of AI tools
2. Strategic consulting
3. Creativity



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

1. Sustainability and climate change
2. Mental health
3. Diversity and social inclusion



Top 3 most commonly selected answers



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

1. Influencer marketing
2. Corporate reputation
3. Digital PR



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

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



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

1. ESG
2. Influencers communications
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. Financial pressure to meet profit/margin targets
2. Clients unwilling to commit sufficient funds
3. 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
2. Misinformation/disinformation
2. Lack of internal policy on ethical behaviour
3. Pressure from clients



What is the biggest challenge PR agencies in 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 in?

1. Purpose and ESG
2. Mastery of AI tools
3. Multimedia content creation



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

1. Sustainability & climate change
2. Diversity & social inclusion
3. Mental health



Top 3 most commonly selected answers



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

1. Multimedia content creation
2. Corporate reputation
3. Social media and community management



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

1. Technology
2. Consumer products
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. Influencers communications
3. Multimedia



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. Staff retention
3. Staff recruitment



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 training
3. Lack of consequences for agencies that do not behave ethically



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

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



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

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



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



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. Social media community management
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. Clients unwilling to commit sufficient funds
3. Staff retention



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 in face when it comes to their talent strategy?

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



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

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



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. Education



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. Insights, data, evaluation and analytics



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

1. Technology
2. Financial and professional services
3. Not-for-profit



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

1. ESG
2. Research, insight and planning
3. Marketing and business development



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. Clients unwilling to commit sufficient funds



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. Balancing agency income/growth with considerations around ethical behaviour/clients
3. Pressure from clients



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

1. Retaining key talent
2. Finding people with diverse career backgrounds
3. Motivating younger executives



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

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



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

1. Sustainability & climate change
2. Diversity and social inclusion
3. Mental health

WESTERN 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. Influencer marketing



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. 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. 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. 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 in face when it comes to their talent strategy?

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



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

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



EMBRACING THE DIGITAL FRONTIER: THE EVOLVING LANDSCAPE OF PR IN AFRICA



Bridget von Holdt

CO-MARKET LEAD, BCW AFRICA &
AFRICA PRESIDENT, ICCO

In the rapidly evolving realm of Public Relations across Africa, the convergence of technology and communication is propelling the industry into new frontiers. As we gaze into the future, it's evident that the African PR landscape is not only adapting to technological advancements but is also spearheading innovation in the global PR arena.

Technological Adoption

Africa has swiftly embraced new technologies, with Artificial Intelligence, Information Analysis, and the Internet of Things taking centre stage. Adoption of these innovations, which not only streamline communication but also enhance the effectiveness of PR campaigns, underscores the industry's commitment to staying at the forefront of global PR trends.

Challenges and Concerns

Despite the technological strides, challenges persist. Fake news, ethical considerations, talent retention and budget allocation remain top concerns for PR agencies. Economic instability, funding issues and sales challenges pose additional hurdles for businesses and clients. Navigating these challenges requires a delicate balance between ethical practices, talent management and financial sustainability.

Growth Areas

The past year witnessed remarkable growth in Corporate Reputation, Social Media & Community Management, and Digital PR. This surge aligns with the sector's increasing reliance on technology and its integration into PR campaigns. Sectors experiencing growth include financial and professional services, technology and consumer products, signifying the industry's adaptability to the digital landscape.

Looking Ahead to 2024

Agencies are gearing up for the future by investing in expertise and services related to ESG (Environmental, Social, and Governance), research, insight, planning and Social Media

Community Management. As the digital environment continues to evolve, staying ahead of these trends positions agencies to deliver impactful campaigns that resonate with clients and their target audiences.

Ethical Challenges

The challenge of maintaining ethical standards persists, particularly concerning misinformation and disinformation. Balancing income with ethical considerations and addressing the lack of consequences for unethical behaviour remain ongoing concerns. As PR becomes increasingly intertwined with global issues, ethical conduct is paramount in building trust and credibility.

Talent Retention and Diversity

Globally, talent retention is a common challenge, and Africa is no exception. Motivating younger executives and incentivizing senior staff are crucial elements in retaining a skilled workforce. The industry's commendable performance in reflecting ethnic demographics underscores the importance of diversity and inclusion.



Future Skill Sets

Looking ahead, PR executives need to master AI tools, possess expertise in Purpose and ESG (Environmental, Social, and Governance), and excel in strategic consulting. These skills will be crucial to navigating the complexities of an ever-evolving digital landscape and addressing the diverse needs of clients.

Client Priorities

Clients are expected to prioritize sustainability, climate change, education, diversity and social inclusion in the coming decade. The shift towards an 'always-on' approach to PR emphasizes the importance of building lasting relationships with stakeholders and cultivating a robust reputation base.

In conclusion, Africa's PR landscape is not just keeping pace with global trends; it's pioneering innovative approaches that blend technology, ethics and strategic foresight. As the industry continues to evolve, the ability to harness technology, uphold ethical standards and adapt to changing client priorities will be the linchpin for success in the dynamic world of Public Relations.



CULTURE OF COMPROMISE RISKS STIFLING INDUSTRY POTENTIAL



Caroline Hsu

**CHIEF GLOBAL OFFICER
THE HOFFMAN AGENCY
& APAC PRESIDENT, ICCO**

Asia-Pacific has always been a highly diverse and complex region with markets at dramatically different stages of maturity. ICCO's World PR Report reflects this, highlighting a gap between the industry's promise and the current reality.

First, the good news: Asia-Pacific ranks first in terms of optimism about the growth of the PR market. Expectations of an increase in agency profitability this year are second only to the Middle East. And it falls in the top three in terms of client willingness to entrust PR firms with leading non-traditional services.

This is encouraging. But closer inspection reveals cause for concern. Misguided expectations and a shortfall in investment from clients sees agencies compromising in areas such as innovation, talent and ethics.

When it comes to successfully addressing client digital needs and adopting new technology, the region ranks a resounding last. This jars with the image of Asia-Pacific as one of the world's most connected geographies and suggests that the PR industry is failing to keep pace. The reality is more complex. Technology infrastructure spending is growing, but remains significantly lower than in North America, where much of that technology originates — with corresponding cost. This leads to a disconnect where clients expect cutting-edge digital services at local prices, effectively refusing to pay for the technology that powers them.

We can draw a link between this and the fact that relatively few marketers are increasing spend on PR versus other communications disciplines. An ongoing talent shortage adds to the issue. While Asia-Pacific PR does a fair job of sourcing talent from outside the industry, the overall supply of capable practitioners remains far lower than markets like North America, the Middle East and even Africa.

Then there is the question of ethics. While corporate CEOs in Asia-Pacific are seen to take corporate reputation almost as seriously as their counterparts in North America, the region ranks second-lowest above Eastern Europe in terms of perceived ethical standards. Respondents cite lack of consequences for unethical behaviour, balancing income demands with ethical concerns, and client pressure as the biggest contributing factors.

Asia-Pacific remains a key driver of global growth. To catch up to the region's potential, the PR industry must evolve — fast. The responsibility to raise the bar falls on both clients and agencies.

The perception that Asia-Pacific should be “cheap” extends beyond technology to encompass all aspects of PR counsel. Indeed, respondents cite the biggest challenge they face as client unwillingness to commit sufficient funds. Given the region's economic and strategic importance, and the fact that it is home to several of the world's most expensive cities, this attitude is detached from reality

At the same time, the industry can and must act to improve its quality of service. The second-biggest challenge seen is the inability to measure PR's impact. The focus has to shift from burnishing communications metrics to solving defined business problems — such as how to attract the best talent; how to establish a footing in a new market or business segment; or how to build a consistent yet localised brand identity across multiple markets.

Providing meaningful support such as this is only possible with corresponding investment. The most impactful agencies should always command a premium, but no agency can afford to compromise on fees or on ethics to meet unrealistic expectations: a race to the bottom serves no one. As agencies, we can be our own worst enemies. For the industry to grow, we must believe in the value of our offering — and charge accordingly.



DEVELOPMENT OF COMMUNICATIONS INDUSTRY THROUGH TURBULENCE: EXPERIENCE AND PROSPECTS OF EASTERN EUROPE



Sergii Bidenko

REPUTATION AND CRISIS ADVISOR,
CHAIRMAN OF THE UNITED PR
ASSOCIATION OF UKRAINE (UPRA)

The dynamic changes in social relations in Eastern Europe are worthy of close observation.

The political climate significantly influences the business landscape. It means that in times of high political tension, communications professionals are essential members of their business clients' crisis management teams.

Russia's war against Ukraine continues to have a strong impact on the Eastern European region. European business provides moral and material support to Ukrainians, facilitates their employment, and assesses opportunities to own participate in the post-war reconstruction of Ukraine's economy and infrastructure.

For ethical and reputational reasons, it is common for communication agencies to refuse to co-operate with companies still operating in Russia. This principle of choosing clients from a business ethics perspective pays dividends, as it allows one to work with clients who have adapted to economic changes and have good business resilience and reputational strength.

Last year, the number of requests from clients for work with corporate reputation, social media and community management increased. Strategic consulting for large companies remains in demand. According to the ICCO member survey, technology, healthcare, and consumer products were the key industries that saw growth.

Communications agencies expect their clients to invest more in ESG, social media and multimedia to meet society's demands.

Businesses focus on critical social issues - sustainability, climate change, mental health, diversity and social inclusion. Many companies now consider these themes when planning their PR strategies, as society needs real stories of action, not empty promises.

Challenges abound in the communications market. Ups and downs in the economy are always a cause for concern. There is a lot of competition in the labour market for qualified people. Agencies must work hard to find effective recruitment consultants, retain top talent, hire mid-level employees and discover talent.

The tendency of clients to optimise their marketing and communication budgets is alarming, with increasing expectations of a broader range of tasks performed by communication agencies.

The communications sector also needs to balance client relationships, especially in the face of pressure on agencies. Challenges arise when meeting the agency's revenue budget. They may face ethical issues due to questionable client ideas that use current trends but are not backed up by actual achievements.

In such cases, communications professionals advise clients to abandon the questionable idea or offer a different solution. It can create tension in working communications but has a reputationally correct effect on the business in the long term.



Another market challenge is the lack of meaningful consequences for agencies that adopt unethical approaches in their work. However, some examples demonstrate that in the case of publicising unethical actions of a communications agency or its representatives, their current and potential business clients often decide to refuse future cooperation.

Speaking about the prospects of development of the public relations industry, we note that nowadays, innovations do not appear out of the blue but evolve daily with us. Therefore, a routine working process for public relations managers is constantly asked to update their skill set.

The PR industry in Eastern Europe will continue to evolve in an innovative, digital and ethical way shortly. To succeed in PR, we must harness the power of artificial intelligence, foster creativity and consider social issues.



Our experience shows that those who adapt quickly will succeed in an era of permanent changes.





TIME TO FIND COMMON GROUND: THE ROLE OF PR IN TODAY'S POLARIZED SOCIETY



Massimo Moriconi

EUROPE PRESIDENT,
ICCO AND CEO OMNICOM PR GROUP
ITALY

In recent years, polarization has grown almost everywhere in Europe due to, inter alia, economic anxieties, geopolitical conflicts and lower trust in Governments and Media. Dis-misinformation powered by AI has been in many cases exacerbating conversations causing a shift from “ideological” to “emotional” polarization. In some Countries, short- and long-term consequences of this scenario include political radicalization, narrowed democratic consensus and weakening of democratic institutions. Meanwhile expectations on companies to step in and play virtuous roles soared.

In this context, today more than ever information society needs PR to find common ground on divisive issues, good and authentic communication needs to be at the core of common efforts to create a trusted ecosystem where different opinions can meet.

Our industry can advise our people, brands, and governments on how to talk to communities, how to manage tough conversations and what to do to reduce risks of polarizations. This is the evolution of our responsibilities and influence in guiding organizational and national narratives. DE&I programs, Media Literacy campaigns and ESGs/SDGs strategies are good examples of what we can do to lower polarization. This opportunity is clearly seen by our business in Europe as - according to ICCO 2023/24 World PR Report - Reputation Management represented the first area of growth in the last 12 months and ESGs are the practice where PR firms expect the highest increase in their investments this year.

Winning dis-misinformation and social divergence is an uphill challenge but the chance here it to work on a collective basis, with trusted partners, keeping ethics and cross-discipline learning at the core of our actions. With this purpose in June 2023, ICCO, Council of Europe and The Trust Project launched the “Media Information and Education Pledge”, initiative that has been designed by representing bodies spanning PR & communications, broadcast media, journalism, institutions, and online media to acknowledge a shared responsibility in tackling misinformation, commit to shared solutions and prevention methods, as well as share the task of educating our own companies

and employees, in addition to the wider public. In October 2023, on the occasion of the Warsaw Global Summit, two additional esteemed organizations committed to the cause as EACD (European Association of Communication Directors) and GWPR (Global Women in PR) joined the pledge.

With this in mind – according to ICCO 2023/24 World PR Report – 85% of European respondents affirmed they know the industry code or ethical guidelines they are signed up to well. Good news. At the same time 54% of EU colleagues declared they have integrated AI tools into their everyday processes vs 44% of professionals in Asia-Pacific, 57% in Africa, 67% in Latin America and 68% in North America. Risks and opportunities coming from AI are plain to see, we need to be trained and train our people within a shared framework of values. In this sense a relevant milestone is represented by “ICCO’s principles for the ethical use of AI in public relations”, set of guidelines ICCO just ratified in Warsaw.

There’s still a lot to do but - in such chaotic times - focusing on what depend on us plus what we can learn from trusted partners seems a solid approach to create common grounds in polarized conversations and keep our industry healthy.



SHAPING THE FUTURE THROUGH INNOVATION, OPTIMISM, AND PURPOSE-DRIVEN



Ahmad Itani

CHAIRMAN OF PRCA MENA
PRESIDENT OF ICCO MIDDLE EAST

FOUNDER AND CEO OF CICERO & BERNAY,
A COMMUNICATION PARTNER

As we embark on charting the course of the 2024 global PR industry, it becomes evident that this trajectory is shaped by the ever-evolving landscape, driven by the forces of change and propelled into the dynamic realm of digital communication. Within this evolving ecosystem, two pillars, social media and multimedia content creation, emerge as beacons of growth for organisations seeking to thrive in this new era.

But this transformation is not without its challenges and opportunities. Recognizing the shifting tides of demand, PR firms are set to make substantial investments in Environmental, Social, and Governance (ESG) initiatives, influencer communications, and multimedia content development. These strategic moves align with both market expectations and the

ever-evolving digital ecosystem, positioning PR agencies at the forefront of innovation.

Additionally, there's an electrifying air of optimism in the world of global public relations, and the Middle East is boldly seizing the reins of this transformation, reflecting the growth of the PR sector, which registered an impressive 7.9 out of 10 on the optimism scale. This surge of hope finds its roots in a remarkable narrative of agency profitability, where the Middle East strides ahead with a commanding 7.8 out of 10, outshining its global peers.

One of the most striking shifts in recent times is the elevation of corporate reputation and purpose to the forefront of business strategy. Corporate CEOs in the Middle East now understand the paramount importance of reputation, scoring a resounding 7.8 out of 10. Furthermore, the corporate world is increasingly attuned to its purpose, with companies paying more attention to their societal role, securing a noteworthy 7.3 out of 10.

This pivot towards reputation and purpose aligns with the allocation of resources. Middle East Marketers are recognizing the potency of public relations, investing more significantly in comparison to other communication disciplines, with a rating of 5.6 out of 10, a shift that underscores the industry's growing relevance in shaping brand narratives. This is further consolidated and supported by the trust clients are placing in

public relations firms for an array of non-traditional services, with the Middle East emerging, once again, as a trailblazer, securing an impressive rating of 7.4 out of 10 in this domain. These firms exhibit remarkable prowess in tending to clients' digital needs, boasting a commendable score of 7.1 out of 10, a testament to their dexterity in navigating the ever-evolving digital terrain.

But at the heart of this transformative journey lies talent, often revered as the lifeblood of any industry. Here, the Middle East leads the pack with an impressive score of 6.4 out of 10, showcasing the PR industry's adeptness at sourcing talent from diverse and unconventional sources. Moreover, the industry's commitment to staying abreast of technological advancements is unmistakable, reflected in a rating of 6.5 out of 10. In an era defined by relentless innovation, the Middle East's PR industry is resolute in maintaining its position at the vanguard of progress.

As the PR industry continues to flourish, it is evident that the Middle East is at the forefront, leading the way in optimism, profitability, and a strong dedication to corporate reputation and purpose. The region's remarkable capacity to adapt to change, draw in diverse talent, and remain on the cutting edge of technological advancements establishes it as a beacon of innovation and progress in the global PR landscape.



Mary Beth West

SENIOR STRATEGIST,
FLETCHER PR & ICCO BOARD

Amid a world immersed in ongoing, emerging, and potential military conflicts respectively via Russia / Ukraine, Israel / Palestine, and China / Taiwan, 2024 in North America will be dominated in large part by another U.S. Presidential election, shaping the tenor and tone of vast swaths of organizational policies and public relations messages.

The PR agency world has no time to be too distracted across competing priorities for finite resources, time, and talent.

Nonetheless, the demands of PR agencies don't seem to stop multiplying, all the while, client budgets remain unequal to clients' own expectations.

North American PR agency leaders cited "clients unwilling to commit sufficient funds" as the second-greatest challenge for PR firms in the region, behind economic conditions generally.

Included within those under-funded competing priorities, clients' surging demand for harnessing the potential (and mitigating the risks) of Artificial Intelligence (AI) is dominating the global PR industry.

Among the percentage of PR agency leaders who report having "integrated AI tools into their everyday processes," the North America region leads the pack globally, with 68% (against a global average of 59%).

On the talent front, the ICCO World Report documents that "Mastery of AI tools" registers globally as #1 on a list of 14 "future talent relevant skill sets" (it's #3 for North America, after "measurement, evaluation and analytics" skills at #1, and "research, insight and planning" at #2).

Meanwhile, North America placed #1 globally in its leaders' levels of agreement with the statement that "There is a plentiful supply of talent."

This response may indicate that post-pandemic PR talent demand is softening in the region. To that point, "retaining key talent" registers as North American PR firms' biggest talent-strategy challenge.

There may be no more critical overarching factor on matters of AI, ESG, Diversity, and respect for the PR industry in general, than PR leaders' competencies and applications of ethics.

On par with the global average, 92% of North American PR leaders "believe it is the role of PR agencies to advise clients against behaviour that they deem unethical."



But for North America, there's seemingly a disconnect with this fairly high statistic.

Only 56% of North American PR leaders report they themselves are "signed up to an industry code of conduct" (against a global average of 63%). On a regional basis, only the Middle East registers a lower percentage.

Meanwhile, 86% of these same North American PR leaders – the highest percentage globally – claimed to "know the PR industry's ethical guidelines to which you or your organisation are signed up to" (over-indexing the global average of 81%).

Seems more than a bit incongruous.

North American leaders cited the three "biggest ethical challenges for PR professionals and agencies" in the region as "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."

With ICCO having unveiled in October 2023 its Warsaw Principles for ethical use of AI – within ICCO's larger framework of key #PRethics principles, such as the Stockholm Charter and the Helsinki Declaration – PR agencies in North America and worldwide can continue looking to ICCO as a voice for industry standard-setting and advocacy.





Daniel Bruin

PRESIDENT OF ABRACOM

BRAZILIAN ASSOCIATION OF CORPORATE COMMUNICATION AND PR AGENCIES

With the results of the Global Survey conducted by the International Communications Consultancy Organisation (ICCO), we gain profound insights into the current landscape of the public relations (PR) industry in Latin America. The findings indicate a notable surge in three key areas: Influencer Marketing, Corporate Reputation, and Digital PR. These trends signify a shift towards contemporary communication strategies resonating with modern audiences, highlighting the importance of fostering authentic brand interactions and trust in a competitive marketplace.

The survey identifies the sectors that experienced growth in Latin America during 2022 as Financial and Professional Services, Technology, and Consumer Products. PR agencies are called upon to safeguard reputations, maintain competitiveness, and employ innovative approaches to engage audiences effectively.

Moreover, the heightened emphasis on Corporate Reputation underscores the enduring value of trust and credibility in our increasingly competitive marketplace. We recognize that maintaining and enhancing corporate reputation is not just about business success; it is a testament to our commitment to ethical and transparent communication. Additionally, the integration of Digital PR into communication strategies highlights the ever-expanding role of the digital landscape in shaping public perceptions. As industry leaders in the region, we must harness the potential of this medium to engage with audiences effectively.

The survey also delves into the sectors that experienced growth in Latin America during 2022. Financial and Professional Services, Technology, and Consumer Products emerge as the forerunners, showcasing the multifaceted demands placed on PR agencies operating within the region. Financial and Professional Services lean on PR to safeguard their reputation and trust in an increasingly competitive

environment, and it is here that the expertise and ethical principles championed by Abracom come into play.

The continuous evolution within the Technology sector necessitates effective communication strategies to maintain a competitive edge, and it is crucial that our industry remains at the forefront of technological advancements. The Consumer Products industry, marked by fierce competition, underscores the need for PR expertise to engage with audiences effectively. Here, the innovative and creative approaches that Abracom promotes are of paramount importance.

Looking ahead to 2023, the survey anticipates increased investments in ESG initiatives, Influencer Communications, and Social Media Community Management by PR firms in Latin America, emphasizing the growing significance of ESG in corporate strategies.



Key challenges in PR in Latin America revolve around balancing digital communication's evolving landscape with authenticity, managing client expectations amid financial constraints, and retaining skilled talent. Ethical considerations are paramount, including balancing agency growth with ethical standards, addressing misinformation/disinformation, and advocating for industry-wide ethical policies.

At Abracom, we have long recognized the importance of ethical considerations in the PR industry in Brazil. The survey reveals that the most significant ethical challenges for PR professionals and agencies in Latin America revolve around balancing agency income and growth with ethical considerations. Misinformation and disinformation, as well as the lack of internal ethical policies, pose significant ethical challenges. To address these issues, we remain committed to upholding the highest ethical standards and advocating for their adoption industry wide.

Talent strategy remains critical, with a focus on talent retention and professional development to adapt to evolving skill sets, including Purpose and ESG, AI tools, and multimedia content creation.

Clients in Latin America are likely to prioritize Sustainability & Climate Change, Diversity & Social Inclusion, and Mental Health in their communication strategies, reflecting a growing awareness of social and environmental issues and the importance of inclusivity.

In conclusion, the ICCO survey offers valuable insights into the Latin American PR industry, underlining the need to adapt to emerging trends and address challenges effectively. The Brazilian Association of Corporate Communication (Abracom) is committed to championing ethical communication and nurturing talent for continued industry growth and success in Latin America. Together, we can shape the future of corporate communication in the region.





Alison Clarke

ALISON CLARKE CONSULTING
& ICCO BOARD

The results of the 2023 ICCO World Report clearly show that the UK market has experienced a challenging year following a relatively strong bounce back after the pandemic. The economic backdrop and uncertainty associated with that are uppermost in the minds of respondents when asked about the greatest challenges for PR firms.

This coupled with the client community being cautious and, in some cases, unwilling to commit sufficient funds to programmes has put significant pressure on profit and margin targets.

Aside from economic challenges the search for and retention of key talent remains an on-going issue. The industry is working hard to attract candidates with diverse career backgrounds, but it remains a work in progress. This is in spite of 74% of UK respondents having a D&I policy and 83% having a dedicated and trained person responsible for D&I within the company.

Once talent is on board firms are focussed on engaging younger members of the team to support learning and development – particularly given the hybrid work model operating now – but also to motivate them and secure commitment to their role. As part of this focus mental health support is a clear priority amongst UK agencies with 77% of respondents having formal mental health and wellbeing support on offer. Encouragingly 92% agree that the support in place is effective in tackling issues.

The challenges around talent remain uppermost in the focus of PR leaders. The industry knows that securing and growing great talent is the lifeblood of any consultancy.

Last year saw healthy growth in technology, financial and professional services and perhaps surprisingly, not for profit sectors. However more recently those serving the technology sector have had to share the pain of the downturn across the industry.

On an encouraging note, demand for corporate reputation support, strategic consulting and a focus on insights, data, evaluation and analytics are among the top three areas cited as contributing to growth last year.

This trend supports the continued drive for PR and communications to have a seat at the senior table and the attention and focus of business leaders.

Continuing these strategic partnership indicators respondents say that ESG, research and planning, marketing and business development are all areas for firms to invest in this year. This will ensure that their value proposition and market offer meet the business needs of the client community.

Those areas of investment mirror the skills sets that will be most relevant for PR executives in the next decade. Strategic consulting, measurement, evaluation and analytics and purpose and ESG all ranked the highest amongst UK respondents.



When questioned on the biggest ethical challenges for PR professionals the lack of consequences for agencies that don't behave ethically or work for unethical clients was the highest ranking response. The UK was also the highest ranking by region to have signed up to an industry code of conduct with 84% of respondents confirming participation. Balancing agency income and growth with considerations around ethical behaviour together with pressure from clients were also referenced in answer to the question.

Finally, in looking ahead and considering macro societal issues that will be the priority for clients - sustainability and climate change, diversity and social inclusion and mental health are the top three.

The UK industry with the priorities and investments indicated by respondents should be well placed to take advantage of the trends and opportunities ahead.



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Canada	The Canadian Council of Public Relations Firms (CCPRF)	ccprf.ca	judylewis@strategicobjectives.com
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Denmark	Kreativitet & Kommunikation	kreakom.dk	sa@kreakom.dk
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France	Syndicat du Conseil en Relations Publics	relations-publics.org	am.dubois@relations-publics.org
Georgia	Association of Communication Agencies of Georgia (ACAG)	acag.ge	acag.ge@gmail.com

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Hungary	Hungarian PR Association (HuPRA/MPRSZ)	cmprsz.hu	iroda@mprsz.hu
India	Public Relations Consultants Association of India (PRCAI)	prcai.org	ceo@prcai.org
Ireland	Public Relations Institute of Ireland (PRII) Public Relations Consultants Association (PRCA)	prii.ie	martina@prii.ie
Italy	UNACOM	unacom.it	info@unacom.it
Kazakhstan	National Public Relations Association of the Republic of Kazakhstan (HACO)	naso.kz	info@naso.kz
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Latvia	Latvian Communication Association (LaKA)	laka.ngo	zane.vitola@ka.lv
Lithuania	The Association of Communication Industry (KIA)	komunikacija.lt	info@komunikacija.lt
Mexico	Confederation of the Marketing Communication Industry in Mexico (CICOM)	-	Icarreno @marketingq.com.mx
Middle East and North Africa	Public Relations and Communications Association Middle East and North Africa (PRCA MENA)	prca.mena.global	monika.fourneaux @prca.global

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Romania	"Romanian Public Relations Association (ARRP)	arrpromania.ro	arrp@arrpromania.ro
Slovakia	Asociácia public relations Slovenskej republiky (APRSR)	https://asociaciapr.sk/	prezidentka@asociaciapr.sk
Southern Africa	The Public Relations Institute of Southern Africa (PRISA)	prisa.co.za	annah@prisa.co.za
Spain	ADC (Asociación de Consultoras de Comunicación)	asociacionadc.org	adc@asociacionadc.org
Sweden	The Association of Public Relations Consultancies in Sweden	precis.se	info@precis.se
Switzerland	Leading Swiss Agencies	leadingswissagencies.ch	audrey.arnold@leadingswissagencies.ch
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