



ICCO
WORLD PR
REPORT
2020

AGENCY VIEWS OF THE PATH AHEAD

#worldprreport

Includes The Holmes
Report 250 Global
Agency Rankings

07
Op
Opinium

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 66 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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82 Great Suffolk Street
London SE1 0BE

Rob Morbin
General Manager, ICCO
rob.morbin@iccopr.com



NETWORKS ACROSS 66 COUNTRIES

THOUGHT LEADERSHIP AND RESEARCH



20+ INTERNATIONAL EVENTS

100S OF PROFESSIONAL DEVELOPMENT AND LEARNING RESOURCES



INTERNATIONAL MATCHMAKING AND PARTNER DEVELOPMENT

KNOWLEDGE EXCHANGE AND COLLABORATIVE CAMPAIGNS



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Francis Ingham
CHIEF EXECUTIVE, ICCO

As 2020 approaches, the global PR industry faces the future in fine shape.

Growth, optimism, and profitability have become the norm. The industry has transformed itself, embracing new skills and new methods of communicating. The revolutionisation of business, society, and politics that the digital landscape has effected has played to our strengths.

In short, PR stands tall.

The ICCO World PR Report is the definitive analysis of the state of the PR industry. Drawing on responses from the 3,000 agency heads operating in ICCO's 41 member Associations, this report provides not just global data but regional data too. It offers agency leaders the insight they need to drive their businesses forward, and offers their Associations insight into the services they need to be providing.

So what can we learn from this report?

Quite remarkably, the net percentage of agency heads expecting 2020 to be more profitable than 2019 is exactly the same percentage as reported last year that 2019 would beat 2018. And as last year, this optimism is true in every region of the world bar none. True consistency!

Secondly, every region expects the market to grow, with North America topping the optimism charts.

What is floating this buoyancy?

There are several clearly discernible trends here.

CEOs continue to invest in corporate reputation, embracing the fact that their most valuable asset is their reputation. And this is true in every region of the world. Marketing spend continues to move towards our industry, and away from other ones. Agencies are offering services which traditionally were the preserve of other disciplines. And our industry is meeting clients' digital needs with skill and with results.

Frankly, these are the core factors that we have identified for some years now. So this analysis provides no novelty. But it does provide a great deal of certainty and confidence about the future. Long-term factors are at play, working to our advantage. I see no prospect of this situation changing. Therefore there is every likelihood that the optimism and the growth that have been the hallmarks of so many years in the past will be the hallmarks of many years in the future.

There are however some noteworthy recent developments since last year. The shift towards strategic advice is accelerating. I am convinced that there will always and in every region of the world be a place for tactical delivery, and old-school media relations. But... our industry definitely takes a more strategic role with every passing year. The top two expected areas of growth are strategic consultancy and corporate reputation – excellent news.

The other striking development is the rise of purpose. In every region of the world – and most pronounced in the UK and North America – corporate purpose has moved up the agenda. We saw it in Cannes, and we saw it at the ICCO Global Summit. The concept of value-driven purpose is here in a big way for our industry.

What are the challenges?

Talent remains number one.

Though all regions of the world except one say that there is a plentiful supply of talent, we simply do not attract and retain enough of it. At every level of the industry, and in every region of the world, we have a talent problem. And in two regions – North America and the UK – this is compounded by a failure to reflect the demographics of the consumers, customers, and publics with whom we interact.

The reason we fail to recruit and retain the very best is perfectly simple – we do not pay enough. And we do not pay enough because we charge clients too little. At the heart of this is our consistent failure to adequately measure the effect of our work. And our failure, therefore, to charge appropriately for the results that we deliver.

This long-term failure explains the importance we attach to our relationship with AMEC.

Over a sustained period of time, AMEC has raised standards of evaluation all around the world. Year after year, the numbers show that it is eroding poor measurement practice. That its tools are being adopted by an increasingly large number of practitioners. And that its message is being heard and understood.

This year's numbers represent a milestone. For the first time, a majority of respondents say that they do not ever use AVEs. We should celebrate this fact.

There have been declines in AVE usage in all but one region. And they are rapidly approaching extinction in North America and the UK.

But there is more to be done. And our focus must be on educating clients. 75% of respondents who do use AVEs explain that it is at the request of their clients. And that is a consistent picture region-by-region. Globally, only 13% of agencies that use AVEs do so because they are their preferred evaluation method. So agencies are handing over metrics that they know to be meaningless. And hence our work with AMEC will continue.

The other unsettling finding we would highlight is fake news. A majority of agency heads agree that it is becoming difficult to differentiate between real news and fake news. For an industry that has such a symbiotic relationship with the news media, this is concerning.

Members around the world have spoken of this issue at event after event. And we will now double down on it as an area where ICCO must make a stand.

To end on two optimistic notes.

We asked respondents if they thought that the industry operates ethically. The answers were surprisingly consistent, and very positive. They back up our belief that ours is an overwhelmingly ethical, professional industry. One that takes action when things go wrong. The actions of the UK PRCA against Bell Pottinger in 2017, and the subsequent ICCO Helsinki Declaration have thrown the spotlight on ethics. That spotlight is here to stay, and it is a good thing for our industry.

Finally, there are most certainly plenty of challenges lying ahead of our industry. And they all need to be accepted. But greater than the challenges are the opportunities. And our industry faces both the challenges and the opportunities from a position of enormous and growing strength.



NAVIGATING AN EVERCHANGING BUSINESS LANDSCAPE



James Endersby
CEO, OPINIUM

We were delighted to be asked to partner on the ICCO World PR Report this year – a vital tool to help PR leaders navigate the everchanging business landscape.

Overall the PR industry is excited about the future, with high levels of optimism about growth of the PR market, with this optimism increasing the most amongst those in North America. The areas expected to grow include strategic consulting and corporate reputation, and IT and tech as a sector is also expected to grow over the next 5 years (60%). Times are changing, technology is advancing, and PR is anticipating these changes.

“Overall the PR industry is excited about the future”

When it comes to skills that will be most relevant for PR execs to possess over the next decade, ‘Research, insight and planning’ and ‘Data, measurement and analytics’ clearly come out on top. However, only 22% are currently expecting to source their talent from research analytics this year; this could be indicative of a potential change needed in talent sourcing strategy in order to recruit individuals with these research and analytical skills.

The PR industry is doing well to anticipate the upcoming changes; however, this anticipation needs to be translated into strategy change in order to get ahead of the curve. We hope you find this report a valuable tool in assisting you with navigating this changing business landscape.



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.

www.opinium.co.uk | research@opinium.com | +44 (0)207 566 3190

2019 RANK	2018 RANK	AGENCY	HQ	FE INCOME 2017 (\$)	FE INCOME 2016 (\$)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
1	1	Edelman	USA	888,405,000	893,591,000	5,618	-0.6%	-0.6%
2	2	Weber Shandwick	USA	840,000,000	800,000,000		5.0%	5.0%
3	N/A	BCW	USA	723,000,000	709,000,000		2.0%	2.0%
4	3	FleishmanHillard	USA	605,000,000	570,000,000		6.1%	6.1%
5	4	Ketchum	USA	545,000,000	550,000,000		-0.9%	-0.9%
6	6	MSL	France	450,000,000	460,000,000	2,271	-2.2%	-2.2%
7	7	Hill+Knowlton Strategies	USA	400,000,000	400,000,000		0.0%	0.0%
8	8	Ogilvy	USA	388,000,000	354,000,000		9.6%	9.6%
9	9	BlueFocus	China	336,372,995	321,849,607		4.5%	10.8%
10	11	Brunswick	UK	280,000,000	260,000,000		7.7%	7.7%
11	11	Golin	USA	245,000,000	240,000,000		2.1%	2.1%
12	13	MC Group	Germany	226,753,212	221,261,986	1,139	2.5%	7.9%
13	15	FTI Consulting	USA	223,331,000	192,488,000	641	16.0%	16.0%
14	14	Havas PR	France	200,000,000	215,000,000	1,500	-7.0%	-7.0%
15	16	Vector Inc.	Japan	188,000,000	146,000,000	923	28.8%	28.8%
16	17	W2O Group	USA	177,500,000	144,300,000	651	23.0%	23.0%
17	N/A	ICF Next	USA	157,823,000	150,613,000		4.8%	4.8%
18	18	APCO Worldwide	USA	134,136,700	128,394,000	783	4.5%	4.5%
19	20	Teneo Holdings	UK	130,000,000	120,000,000	750	8.3%	8.3%
20	19	Sunny Side Up Inc	Japan	127,693,699	123,924,592	364	3.0%	3.0%
21	23	WE Communications	USA	126,600,000	110,400,000	870	14.7%	14.7%
22	22	Finsbury	USA	125,000,000	115,000,000	250	8.7%	8.7%
23	20	Porter Novelli	USA	120,000,000	120,000,000		0.0%	0.0%
24	26	Avenir Global	Canada	98,200,000	79,300,000	838	23.8%	23.8%
25	25	Finn Partners	USA	88,114,075	81,875,948	617	7.6%	7.6%
26	24	Syneos Health	USA	85,000,000	85,000,000	370	0.0%	0.0%
27	27	Archetype	USA	74,000,000	82,000,000	605	-9.8%	-9.8%
28	31	Zeno Group	USA	73,373,239	64,610,784	481	13.6%	13.6%
29	28	Ruder Finn	USA	70,500,000	68,000,000	603	3.7%	3.7%
30	33	ICR	USA	70,000,000	63,000,000	190	11.1%	11.1%
30	35	Marina Maher Communications	USA	70,000,000	62,500,000	165	12.0%	12.0%
32	33	Allison+Partners	USA	68,000,000	63,000,000	460	7.9%	7.9%
33	32	FSB Comunicacoes	Brazil	67,860,000	64,494,218	639	5.2%	21.4%
34	44	GCI Health	USA	67,000,000	48,000,000	200	39.6%	39.6%
35	29	FischerAppelt	Germany	66,690,000	65,880,000	504	1.2%	6.6%
36	30	Hopscotch Group	France	62,469,720	65,160,000	533	-4.1%	0.9%
37	41	Hering Schuppener	Germany	61,744,680	52,974,000	199	16.6%	22.7%
38	50	SKD Knickerbocker	USA	60,000,000	43,000,000	115	39.5%	39.5%
39	46	H&H Group	Sweden	55,550,000	46,170,120	470	20.3%	31.3%
40	36	Lewis	UK	55,296,000	62,370,000	370	-11.3%	-6.5%
41	39	Freuds	UK	55,010,000	55,350,000	245	-0.6%	-0.6%
42	37	PMK*BNC	USA	53,000,000	58,000,000	300	-8.6%	-8.6%
42	42	DKC Public Relations	USA	53,000,000	52,800,000	250	0.4%	0.4%
44	52	Prosek Partners	USA	50,346,047	41,680,345	161	20.8%	20.8%
45	N/A	Joele Frank	USA	50,000,000	N/A	120	N/A	N/A
46	43	Instinctif Partners	UK	49,920,000	52,516,350	428	-4.9%	0.3%
47	40	Grayling	UK	49,024,000	56,295,000		-12.9%	-8.2%
48	57	Kyodo Public Relations	Japan	47,853,000	39,411,000	240	21.4%	21.4%
49	49	LLYC	Spain	45,327,150	42,954,000	564	5.5%	5.5%
50	48	Dentsu Public Relations	Japan	45,000,000	45,000,000	270	0.0%	0.0%

2018 RANK	2017 RANK	AGENCY	HQ	FE INCOME 2017 (\$)	FE INCOME 2016 (\$)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
51	47	Kreab	UK/Sweden	43,320,000	45,442,800	400	-4.7%	0.3%
52	37	MWWPR	USA	42,584,020	40,092,325	188	6.2%	6.2%
53	45	Newgate Communications	UK	41,791,747	47,622,237	221	-12.2%	-7.4%
54	51	Four Communications Group	UK	40,947,284	42,423,492	285	-3.5%	1.8%
55	53	PRAP Japan	Japan	40,000,000	41,500,000	283	-3.6%	-3.6%
56	59	M Booth	USA	39,769,636	33,935,533	182	17.2%	17.2%
57	54	Portland Communications	UK	39,680,000	40,500,000	200	-2.0%	3.3%
58	75	SEC Spa	Italy	38,567,007	33,800,560	188	14.1%	20.1%
59	61	Hotwire	UK	36,879,576	33,294,505	264	10.8%	10.8%
60	56	DeVries Global	USA	36,000,000	40,000,000	207	-10.0%	-10.0%
60	65	Carmichael Lynch Relate	USA	36,000,000	30,300,000		18.8%	18.8%
62	58	Grupo Inpress	Brazil	35,856,302	34,650,602	538	3.5%	3.5%
63	77	CYTS-LINKAGE	China	35,580,815	26,356,159	310	35.0%	35.0%
64	69	5W Public Relations	USA	35,251,222	29,239,498	146	20.6%	20.6%
65	62	The Outcast Agency	USA	35,000,000	33,000,000		6.1%	6.1%
66	62	Global Strategy Group	USA	34,000,000	33,000,000	100	3.0%	3.0%
67	70	Adfactors PR	India	33,810,000	28,290,000	700	19.5%	19.5%
68	60	Oliver Schrott Kommunikation	Germany	33,174,000	33,907,200	250	-2.2%	3.0%
69	83	Spectrum	USA	32,900,000	24,000,000	114	37.1%	37.1%
70	68	Prain Global	Korea	30,696,234	29,756,562	214	3.2%	3.2%
71	73	G&S Business Communications	USA	30,480,000	27,275,329	182	11.7%	11.7%
72	71	Coyne PR	USA	30,000,000	28,000,000	133	7.1%	7.1%
73	72	Farner Consulting	Switzerland	29,769,083	27,396,180	145	8.7%	14.4%
74	74	Fahgren Mortine	USA	29,632,896	26,975,583	208	9.9%	9.9%
75	80	French/West/Vaughan	USA	29,280,490	25,241,802	113	16.0%	16.0%
76	67	Citigate Dewe Rogerson	UK	28,032,000	29,970,000		-6.5%	-1.4%
77	79	Serviceplan PR Group	Germany	27,451,200	25,476,000	174	7.8%	13.4%
78	82	Interel	Belgium	26,513,000	24,130,000	193	9.9%	9.9%
79	86	ATREVIA	Spain	26,416,098	23,709,800	352	11.4%	17.3%
80	81	MHP Communications	UK	25,344,000	24,526,793		3.3%	9.0%
81	85	Jackson Spalding	USA	25,000,000	23,434,937	140	6.7%	6.7%
82	87	Strategic Public Relations Group	Hong Kong	24,800,000	23,400,000	289	6.0%	6.0%
83	78	Health Unlimited	US	24,267,133	25,890,471	102	-6.3%	-6.3%
84	89	Kivvit	USA	24,220,353	22,313,223	70	8.5%	8.5%
85	101	Hanover	UK	24,192,000	19,440,000	165	24.4%	31.3%
86	84	Rud Pedersen	Sweden	24,000,000	23,546,000	133	1.9%	1.9%
86	88	Hunter Public Relations	USA	24,000,000	22,500,000	116	6.7%	6.7%
88	91	Sopexa	France	23,798,640	21,112,800	211	12.7%	18.7%
89	96	M&C Saatchi Sport & Entertainment	UK	23,040,000	20,464,032	160	12.6%	18.7%
90	98	Havas Formula	USA	22,324,063	20,001,606	110	11.6%	11.6%
91	116	Imre	USA	21,940,000	16,340,000	133	34.3%	34.3%
92	92	achtung!	Germany	21,801,360	21,090,000	149	3.4%	8.8%
93	103	PR One	South Korea	21,057,348	19,185,774	150	9.8%	9.8%
94	90	Taylor	USA	20,900,000	22,200,000	100	-5.9%	-5.9%
95	64	Racepoint Global	USA	20,876,000	25,074,000	96	-16.7%	-16.7%
96	99	Faktor 3	Germany	20,748,000	19,680,000	211	5.4%	11.0%
97	95	Barabino & Partners	Italy	20,200,800	20,580,000	105	-1.8%	3.3%
98	N/A	Gullers Grupp	Sweden	20,185,770	17,898,120	147	12.8%	23.0%
99	111	Crosby	USA	20,111,007	17,287,799	80	16.3%	16.3%
100	110	PAN Communications	USA	19,893,729	17,741,700	136	12.1%	12.1%

2018 RANK	2017 RANK	AGENCY	HQ	FE INCOME 2017 (\$)	FE INCOME 2016 (\$)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
101	93	Geelmuyden.Kiese Group	Norway	19,727,866	21,040,320	155	-6.2%	-3.0%
102	105	LaunchSquad	USA	19,284,304	19,001,464	114	1.5%	1.5%
103	107	Brands2Life	UK	19,128,191	17,832,564	136	7.3%	7.3%
104	108	Levick Strategic Communications	USA	18,000,000	18,500,000	70	-2.7%	-2.7%
105	112	Highwire	USA	17,901,420	17,019,031	74	5.2%	5.2%
106	115	InkHouse	USA	17,500,000	16,400,000	114	6.7%	6.7%
107	97	Exposure	UK	17,280,000	20,250,000		-14.7%	-10.0%
107	106	Iris Culture	UK	17,280,000	18,900,000	97	-8.6%	-3.6%
109	109	The Red Consultancy	UK	16,896,000	18,495,000	140	-8.6%	-3.6%
110	128	Praytell	USA	16,500,000	10,675,000	106	54.6%	54.6%
111	141	DNA Communications	USA	16,400,000	12,000,000	100	36.7%	36.7%
112	N/A	Mazarine Asia Pacific	Hong Kong	16,384,000	10,700,800	58	53.1%	53.1%
113	119	TRACCS	Saudi Arabia	16,054,000	15,000,000	200	7.0%	7.0%
114	114	Mitchell	USA	16,000,000	16,700,000	66	-4.2%	-4.2%
115	N/A	V+O	Greece	15,977,100	14,220,000	110	12.4%	18.3%
116	123	Pegasus	UK	15,675,875	14,617,140	135	7.2%	13.1%
117	100	Mikhailov & Partners	Russia	15,407,143	20,782,115	192	-25.9%	-10.0%
118	117	Proof	Canada	15,111,535	16,248,113	113	-7.0%	1.9%
119	190	Walker Sands	USA	14,886,412	9,650,014	114	54.3%	54.3%
120	150	Day One Agency	USA	14,751,905	11,147,061	60	32.3%	32.3%
121	118	Haebmau	Germany	14,706,000	15,960,000	143	-7.9%	-3.0%
122	137	Bateman Group	USA	14,499,420	12,447,340	70	16.5%	16.5%
123	171	Headland Consultancy	UK	14,116,294	9,569,466	72	47.5%	55.6%
124	122	Maitland	UK	14,080,000	14,850,000	53	-5.2%	0.0%
125	143	rbb Communications	USA	14,054,774	11,919,171	74	17.9%	17.9%
126	126	Spark	USA	14,000,000	13,500,000	60	3.7%	3.7%
127	121	Lansons	UK	13,867,206	14,964,422	104	-7.3%	-2.3%
128	131	Current Marketing	USA	13,747,500	12,861,000	56	6.9%	6.9%
129	133	The Hoffman Agency	USA	13,665,000	12,722,000	150	7.4%	7.4%
130	N/A	CROS	Russia	13,458,180	11,048,789	120	21.8%	21.8%
131	N/A	Faktenkontor	Germany	13,224,000	7,572,000	85	74.6%	83.8%
132	132	Exponent PR	USA	13,200,000	12,800,000	55	3.1%	3.1%
133	146	Powerscourt	UK	12,672,000	10,800,000	53	17.3%	23.8%
134	134	Wellcom	France	12,540,000	12,600,000	107	-0.5%	4.8%
135	151	KPR & Associates	South Korea	12,218,982	11,138,544	104	9.7%	9.7%
136	125	M&C Saatchi PR	UK	12,160,000	13,901,304		-12.5%	-7.7%
137	135	TogoRun	USA	12,000,000	12,500,000	65	-4.0%	-4.0%
137	140	RFIBinder	USA	12,000,000	12,100,000	55	-0.8%	-0.8%
137	129	Sloane & Company	USA	12,000,000	12,000,000	19	0.0%	0.0%
137	144	Evoke PR & Influence	UK	12,000,000	11,800,000	50	1.7%	1.7%
141	136	A&B One	Germany	11,970,000	12,480,000	67	-4.1%	1.0%
142	154	Method Communications	USA	11,935,285	10,886,975	65	9.6%	9.6%
143	166	Jarrard Phillips Cate & Hancock	USA	11,591,239	9,840,073	36	17.8%	17.8%
144	138	F&H Communications	Germany	11,514,000	12,360,000	60	-6.8%	-1.9%
145	159	Marco de Comunicacion	Spain	11,472,432	10,000,602	120	14.7%	20.8%
146	139	Action Global Communications	Cyprus	11,275,766	12,277,198	278	-8.2%	-8.2%
147	164	C+C	USA	11,153,672	9,902,839	70	12.6%	12.6%
148	N/A	Mower	United States	11,100,000	12,922,389	42	-14.1%	-14.1%
148	214	Diplomat Group	Sweden	11,100,000	6,200,000	88	79.0%	79.0%
150	148	Davies	USA	11,000,000	11,416,316	35	-3.6%	-3.6%

2018 RANK	2017 RANK	AGENCY	HQ	FE INCOME 2017 (\$)	FE INCOME 2016 (\$)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
150	160	Kwitken	USA	11,000,000	10,000,000	70	10.0%	10.0%
150	168	Bliss Integrated Communications	USA	11,000,000	9,600,000	55	14.6%	14.6%
153	145	Lift World	Portugal	10,777,045	9,973,824	78	8.1%	13.7%
154	147	Makovsky	USA	10,409,000	11,696,000	48	-11.0%	-11.0%
155	168	Kyne	Ireland	10,400,000	9,600,000	48	8.3%	8.3%
156	163	LVT Group	Netherlands	10,317,000	9,913,200	85	4.1%	9.6%
157	331	Good Relations	UK	10,240,000	9,450,000	75	8.4%	14.3%
157	183	Citypress	UK	10,240,000	8,363,724	92	22.4%	29.1%
159	165	Murphy O'Brien	USA	10,170,481	9,887,638	50	2.9%	2.9%
160	198	Lambert	USA	10,055,000	7,610,000	55	32.1%	32.1%
161	160	GoodIdea Media	China	10,000,000	10,000,000	100	0.0%	0.0%
161	160	DCI	USA	10,000,000	10,000,000	50	0.0%	0.0%
161	179	Gregory FCA	USA	10,000,000	9,000,000	74	11.1%	11.1%
164	181	JeffreyGroup	USA	9,975,712	8,146,857	157	22.4%	22.4%
165	152	Veritas	Canada	9,855,000	11,040,000	72	-10.7%	-2.2%
166	184	360PR+	USA	9,738,953	8,343,690	57	16.7%	16.7%
167	168	First House	Norway	9,690,000	9,600,000	34	0.9%	6.3%
168	167	W	UK	9,600,000	9,702,252	94	-1.1%	4.4%
169	180	Grupo CDI	Brazil	9,580,000	8,655,000	200	10.7%	10.7%
170	188	MP&F Public Relations	USA	9,541,632	8,123,099	70	17.5%	17.5%
171	N/A	Argyle Public Relationships	Canada	9,491,736	5,433,777	76	74.7%	91.4%
172	173	Jeschenko MedienAgentur	Germany	9,393,600	9,468,000	44	-0.8%	4.4%
173	174	NJF	USA	9,376,703	9,279,419	55	1.0%	1.0%
174	201	Cicero Group	UK	9,313,350	7,290,000	69	27.8%	34.7%
175	175	JPA Health Communications	USA	9,264,491	9,182,471	47	0.9%	0.9%
176	158	SenateSHJ	New Zealand	9,227,308	10,058,000	54	-8.3%	-8.3%
177	331	furrerhugi.	Switzerland	9,032,767	8,310,625	38	8.7%	10.8%
178	176	Saxum	USA	9,000,000	9,150,941	51	-1.6%	-1.6%
179	197	Hope&Glory	UK	8,990,755	7,677,173	71	17.1%	23.5%
180	156	TVC Group	UK	8,960,000	10,354,576	51	-13.5%	-8.7%
181	177	Narva	Sweden	8,855,000	9,096,000	41	-2.6%	6.2%
182	155	Rasky Partners	USA	8,600,000	10,476,319	32	-17.9%	-17.9%
183	186	Lou Hammond Group	USA	8,478,506	8,152,410	40	4.0%	4.0%
184	187	Greentarget	USA	8,467,313	8,134,581	32	4.1%	4.1%
185	210	90TEN	UK	8,448,227	6,710,517	58	25.9%	32.8%
186	200	Harvard	UK	8,223,717	7,307,820	68	12.5%	18.7%
187	209	Nelson Bostock Unlimited	UK	8,064,000	6,750,000		19.5%	26.0%
188	208	Infinite Global	USA	8,060,159	7,025,527	38	14.7%	14.7%
189	206	LDWW	USA	8,042,792	7,033,275	26	14.4%	14.4%
190	215	Vested	USA	8,014,000	6,171,277	39	29.9%	29.9%
191	N/A	JIN	France	7,980,000	6,660,000	65	19.8%	26.1%
192	141	Merritt Group	USA	7,900,000	7,500,000	37	5.3%	5.3%
193	N/A	Sassy	UK	7,877,743	7,581,248	42	3.9%	9.6%
194	191	komm.passion	Germany	7,866,000	7,920,000	60	-0.7%	4.5%
195	149	Max Borges Agency	USA	7,771,854	6,622,973	48	17.3%	17.3%
196	N/A	BECG	UK	7,751,163	5,717,805	63	35.6%	43.0%
197	N/A	CG Life	USA	7,750,000	7,001,500	44	10.7%	10.7%
198	235	Singer Associates	USA	7,690,997	5,201,357	19	47.9%	47.9%
199	196	Fink & Fuchs	Germany	7,666,500	7,682,400	77	-0.2%	5.0%
200	193	Approach	Brazil	7,468,460	7,417,078	154	0.7%	0.7%
201	193	Thomas Marko & Associes	France	7,410,000	7,800,000	36	-5.0%	0.0%

2018 RANK	2017 RANK	AGENCY	HQ	FE INCOME 2017 (\$)	FE INCOME 2016 (\$)	STAFF	GROWTH (USD)	GROWTH (CONSTANT CURRENCY)
202	182	Frank	UK	7,372,136	8,393,427	47	-12.2%	-7.4%
203	N/A	Pierpont Communications	USA	7,341,277	7,175,197	31	2.3%	2.3%
204	172	AMI Communications	Czech Republic	7,333,620	9,538,405	85	-23.1%	-19.1%
205	331	Manifest	UK	7,130,316	5,069,261	40	40.7%	48.4%
206	203	EMG	The Netherlands	7,056,600	6,960,000	44	1.4%	6.7%
207	N/A	Blumberry	Germany	6,976,800	7,236,000	50	-3.6%	1.5%
208	N/A	ORCA Agenturgruppe	Germany	6,942,600	7,656,000	55	-9.3%	-4.5%
209	N/A	RPMA Comunicaçao	Brazil	6,890,000	7,440,000	90	-7.4%	6.9%
210	N/A	Klenk & Hoursch	Germany	6,885,600	6,384,000	53	7.9%	13.5%
211	211	Evercom	Spain	6,805,800	6,674,760	68	2.0%	7.3%
212	207	Mischief	UK	6,805,120	7,047,000	65	-3.4%	1.8%
213	213	Eulogy!	UK	6,538,675	6,330,783	50	3.3%	8.9%
214	212	Octopus Group	UK	6,534,400	6,399,000	54	2.1%	7.7%
215	233	Tact Intelligence-conseil	Canada	6,523,000	5,340,000	67	22.2%	22.2%
216	222	PLMR	UK	6,203,237	5,868,420	50	5.7%	11.5%
217	216	Kirchhoff Consult	Germany	6,112,834	5,850,900	61	4.5%	4.5%
218	226	Partner of Promotion Sp. zo.o.	Poland	6,027,000	5,666,600	65	6.4%	6.4%
219	N/A	Reputation Partners	USA	5,800,000	4,200,000	27	38.1%	38.1%
220	231	Red Lorry Yellow Lorry	UK	5,760,000	5,400,000	28	6.7%	12.5%
221	267	Monet + Associes	France	5,739,900	4,854,000	45	18.3%	24.5%
222	216	Trigger Oslo	Norway	5,700,000	6,000,000	45	-5.0%	0.0%
222	N/A	Piabo PR	Germany	5,700,000	3,720,000	31	53.2%	61.3%
224	227	CP/compartner	Germany	5,677,200	5,652,000	63	0.4%	5.7%
225	231	Konnect Public Relations	USA	5,667,750	5,412,953	33	4.7%	4.7%
226	N/A	Sam Brown Inc.	USA	5,621,644	4,798,695	1	17.1%	17.1%
227	225	Tunheim	USA	5,582,381	5,747,453	28	-2.9%	-2.9%
228	224	Seven Hills	UK	5,520,346	5,813,455	45	-5.0%	0.2%
229	250	Whyte Corporate Affairs	Belgium	5,510,000	4,770,000	29	15.5%	15.5%
230	220	Meropa Communications	South Africa	5,460,000	5,920,000	90	-7.8%	5.4%
231	236	Kaltwasser Kommunikation	Germany	5,415,000	5,196,000	42	4.2%	9.7%
231	N/A	LoeschHundLiepold Kommunikation	Germany	5,415,000	4,980,000	44	8.7%	14.5%
233	234	Dukas Linden Public Relations	USA	5,409,000	5,288,000	23	2.3%	2.3%
234	221	Aspectus	UK	5,376,000	6,260,000	42	-14.1%	16.7%
235	240	SHAN	France	5,358,000	5,040,000	37	6.3%	11.9%
235	331	Kingcom	France	5,358,000	5,400,000	38	-0.8%	4.4%
237	287	The Bulleit Group	USA	5,350,000	3,350,000	27	59.7%	59.7%
238	N/A	Segmenta Communications	Germany	5,323,800	5,088,000	51	4.6%	10.1%
239	N/A	Cannings Purple	Australia	5,312,731	5,187,654	33	2.4%	14.1%
240	238	The Academy	UK	5,248,000	5,153,198	41	1.8%	7.4%
241	242	Hawkins International Public Relations	USA	5,200,000	5,007,837	34	3.8%	3.8%
242	251	Threepipe Communications	UK	5,194,240	4,257,900	81	22.0%	28.7%
243	253	Whiteoaks International	UK	5,165,480	4,651,871	37	11.0%	17.1%
244	N/A	The SPI Group	USA	5,100,000	5,400,000	33	-5.6%	-5.6%
245	230	Pro-Vision Communications	Russia	5,066,598	5,447,954	75	-7.0%	-7.0%
246	N/A	Jones PR	USA	5,042,285	3,804,678	19	32.5%	32.5%
247	274	EM	Russia	5,000,000	4,000,000	24	25.0%	25.0%
248	245	Clockwork Media	South Africa	4,950,000	4,959,000	98	-0.2%	-0.2%
249	N/A	Clarity PR	USA	4,937,945	3,357,967	35	47.1%	47.1%
250	N/A	Communication Consultants	Germany	4,902,000	4,800,000	42	2.1%	7.5%
251	N/A	Ballou	UK	4,884,239	4,730,418	39	3.3%	8.9%



GLOBAL RESULTS

These results are based on findings from an online survey conducted between July and September 2019.

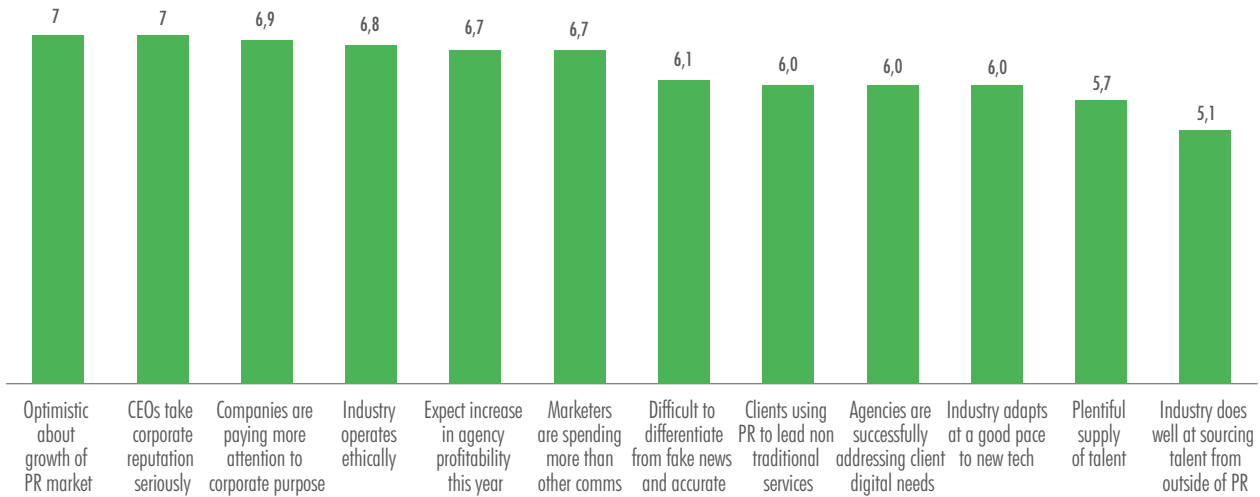
291 PR leaders were surveyed, including 179 CEOs/ MDs/ Owners. Surveys were conducted across the following regions:

Africa and the Middle East *
Asia-Pacific
Eastern Europe
Western Europe

United Kingdom
North America
Latin America *

*markets with a base size of below 30 participants

Perceived growth and opportunity



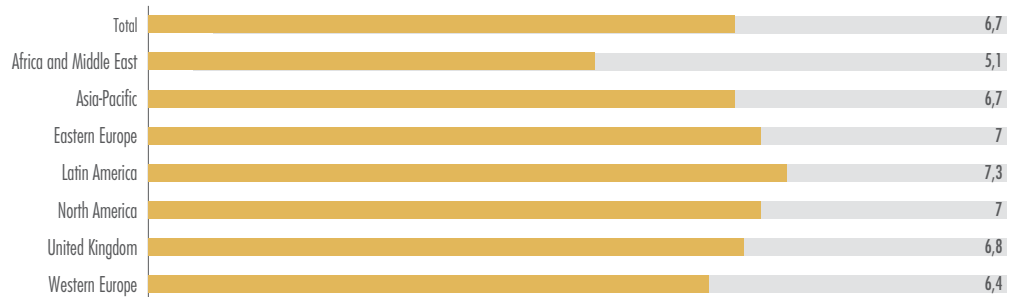
Participants indicated how much they agreed with each statements, in relation to their market, on a scale of 1 to 10, where 1 = strong disagreement and 10 = strong agreement

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

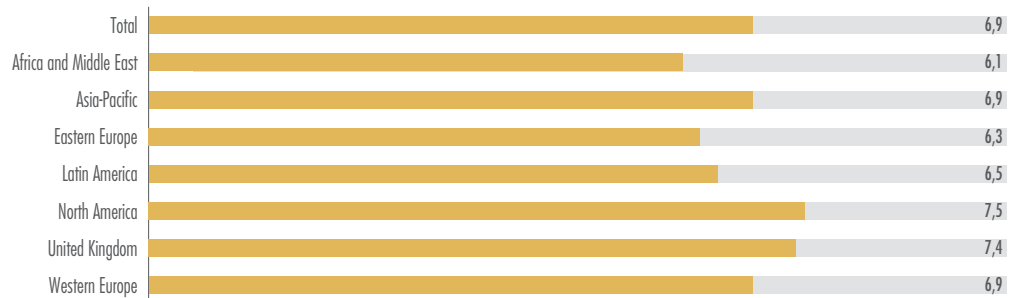


GROWTH AND OPPORTUNITY

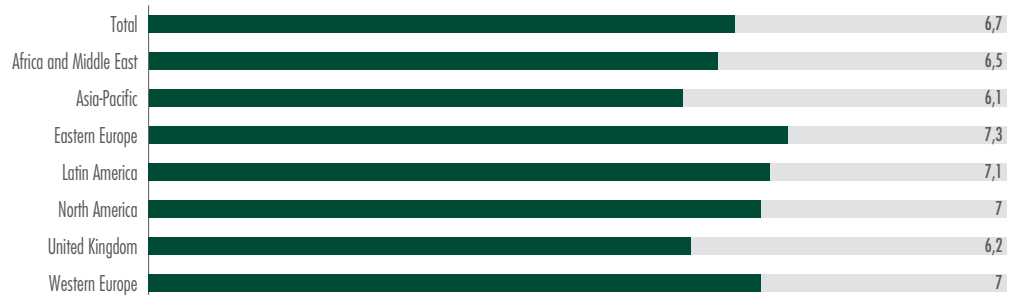
Corporate CEOs take corporate reputation seriously



Companies are paying more attention to corporate purpose



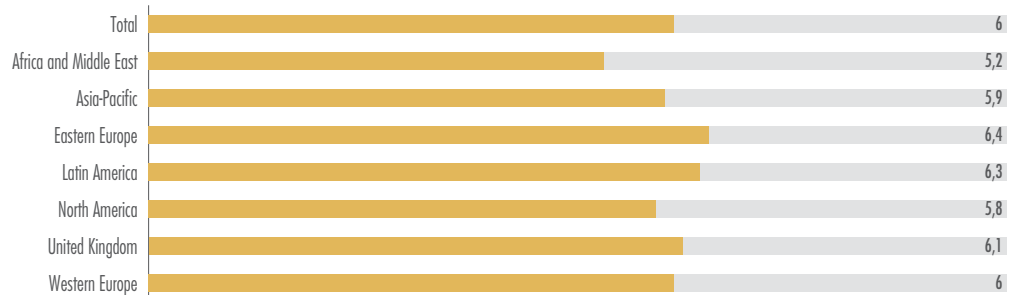
Marketers are spending more money in comparison to other communications disciplines



Clients in this market are willing to turn to PR firms to provide non-traditional services such as advertising, marketing

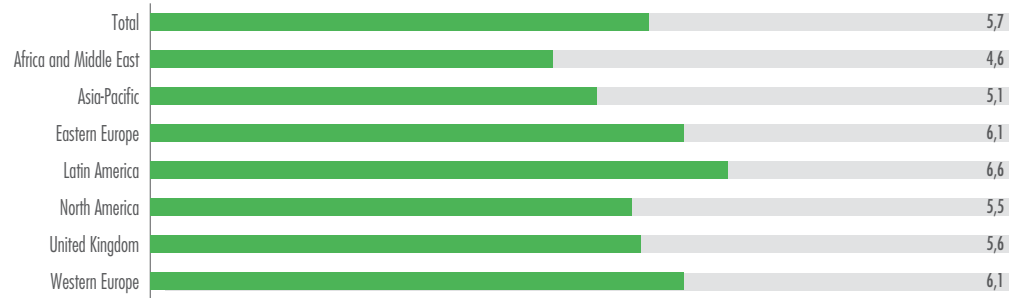


PR agencies are successfully addressing clients' digital needs

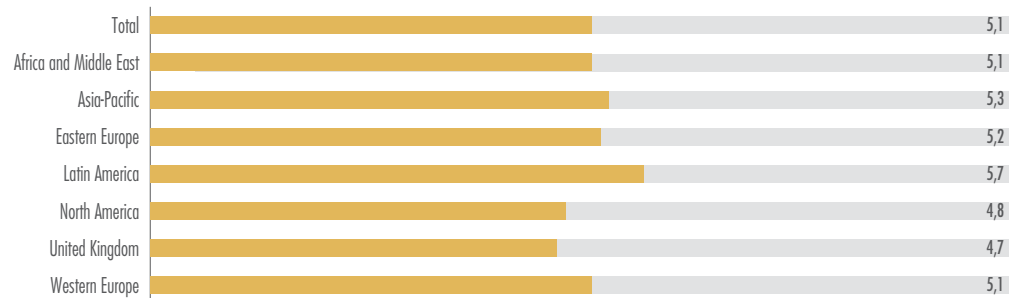


Participants indicated how much they agreed with each statements, in relation to their market, on a scale of 1 to 10, where 1 = strong disagreement and 10 = strong agreement'

There is a plentiful supply of talent in PR



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 operates ethically



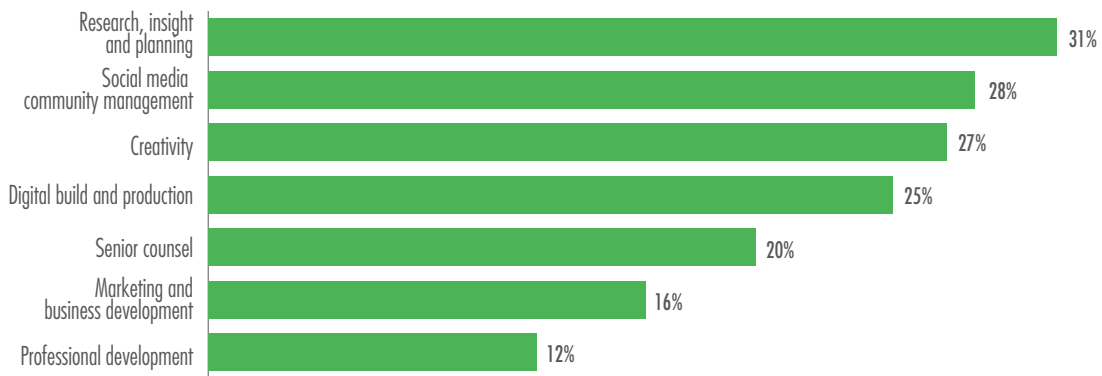
It is becoming difficult to differentiate between accurate information and fake news



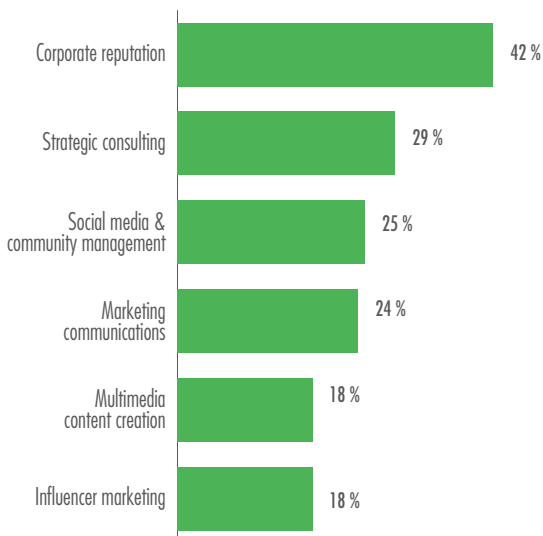
Participants indicated how much they agreed with each statements, in relation to their market, on a scale of 1 to 10, where 1 = strong disagreement and 10 = strong agreement*

GROWTH AND OPPORTUNITY

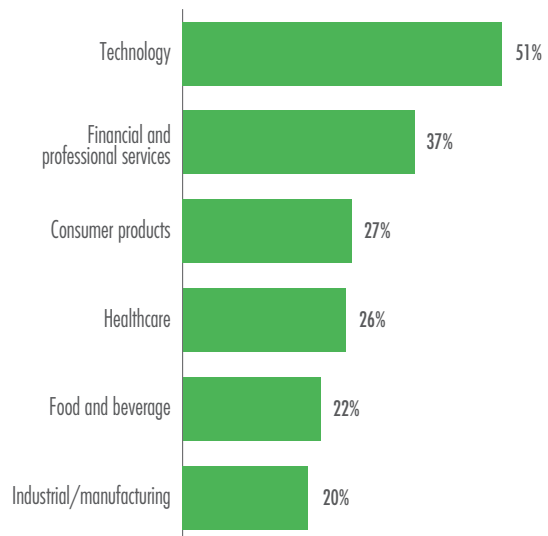
Expected areas of investment for 2020



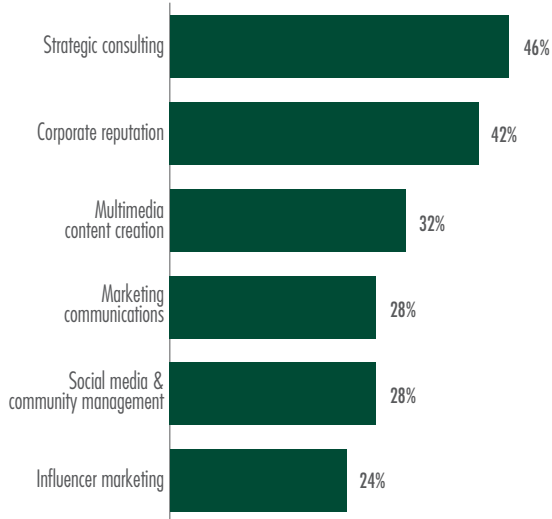
Areas of growth - last year



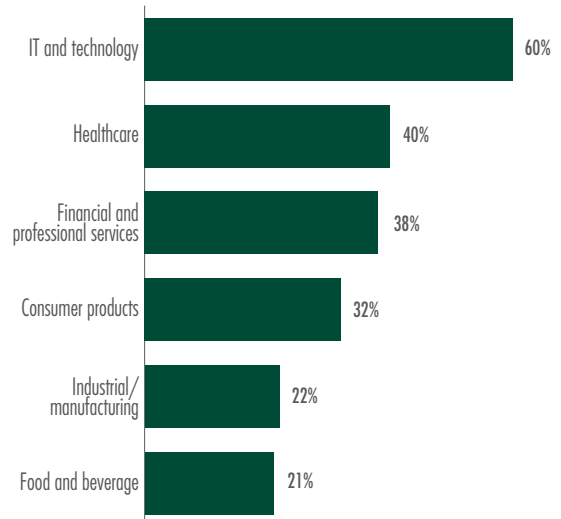
Sectors of growth - last year



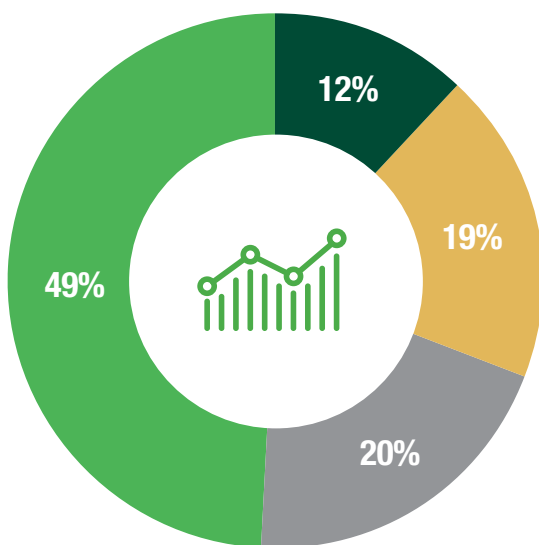
Expected areas of growth over the next five years



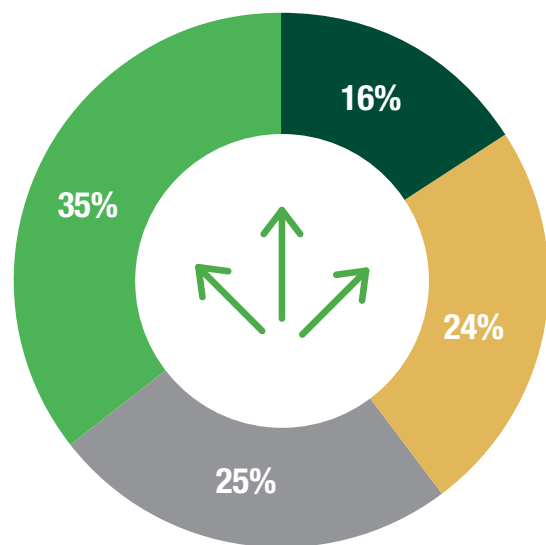
Expected sectors of growth over the next five years



Current work allocation



Forecasted work allocation for next five years



● Earned Media
 ● Owned Media
 ● Shared Media
 ● Paid Media

TALENT AND CHALLENGES

Expected sources of talent for 2020

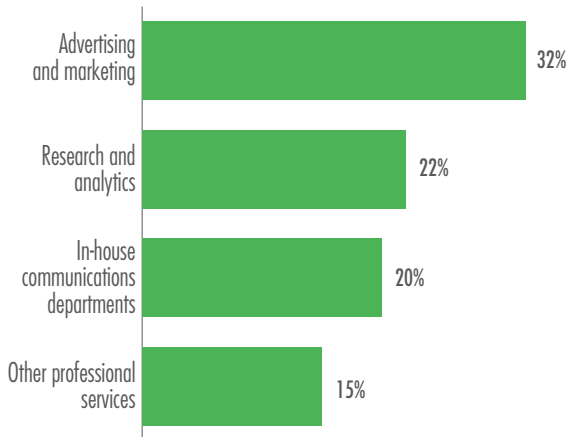


Rival agencies 70%

Journalism 51%



Graduate programmes 42%



Barriers of sourcing talent from outside the industry

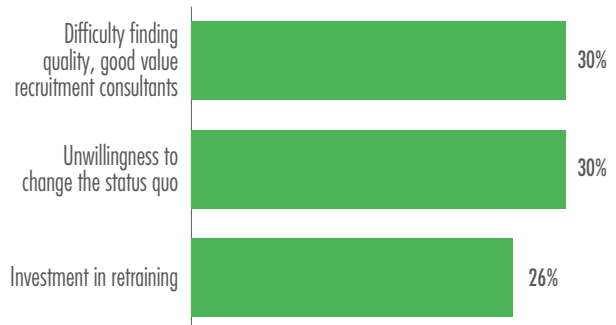


Expected salary levels are too high 52%

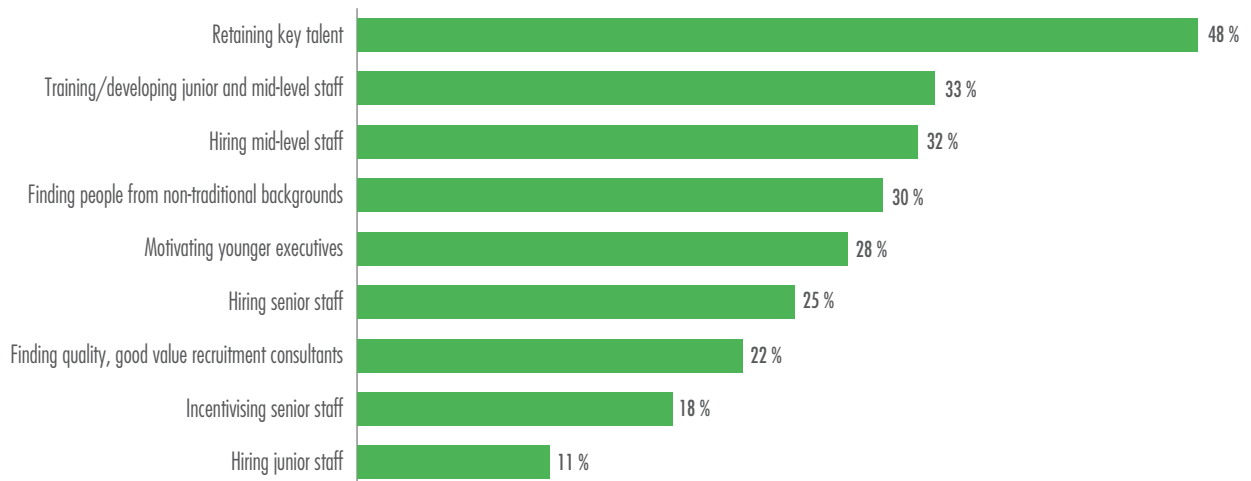
Lack of interest from potential recruits 36%



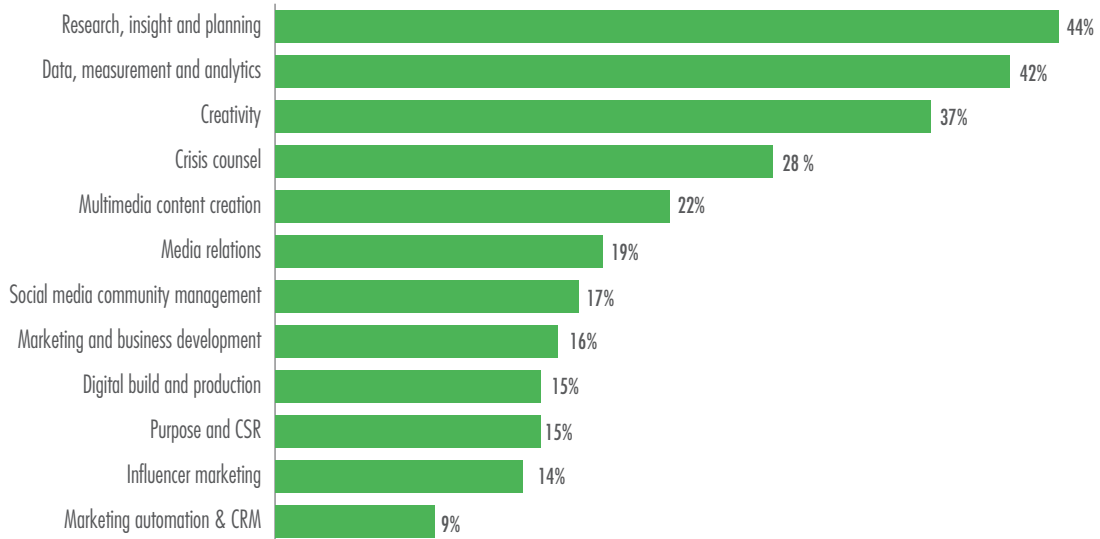
Lack of transferable skills 35%



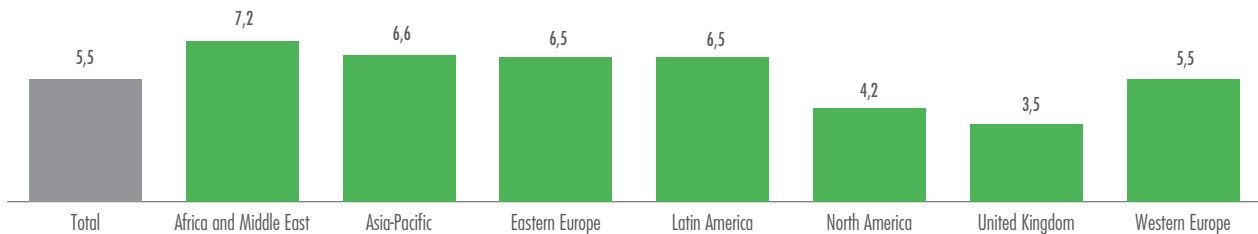
Talent strategy challenges



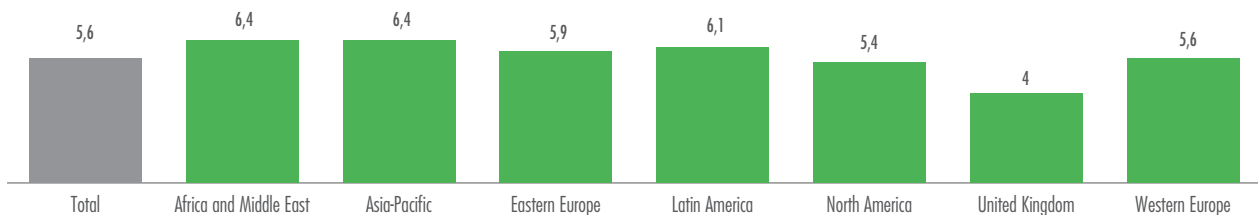
Future talent relevant skill sets for the next decade



Diversity - Industry is reflective of local ethnicity demographics



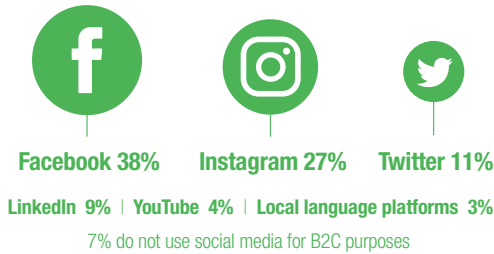
Diversity – reflective of social demographics



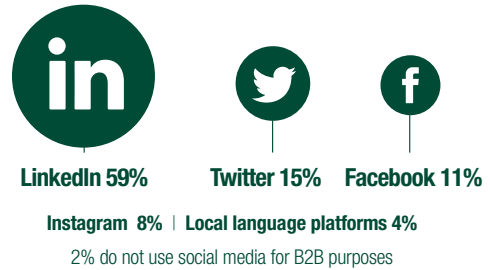
Participants indicated the extent to which they think the diversity of people working in PR in their region is reflective of the ethnic/ social demographics of the population, where 1 = Highly unrepresentative and 10 = highly representative

DIGITAL TRENDS

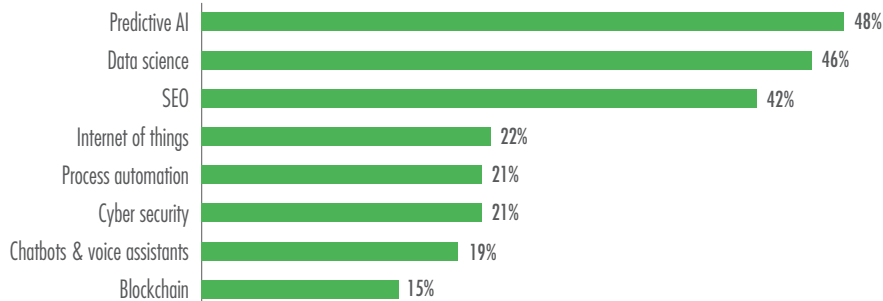
Most used B2C Social media platform



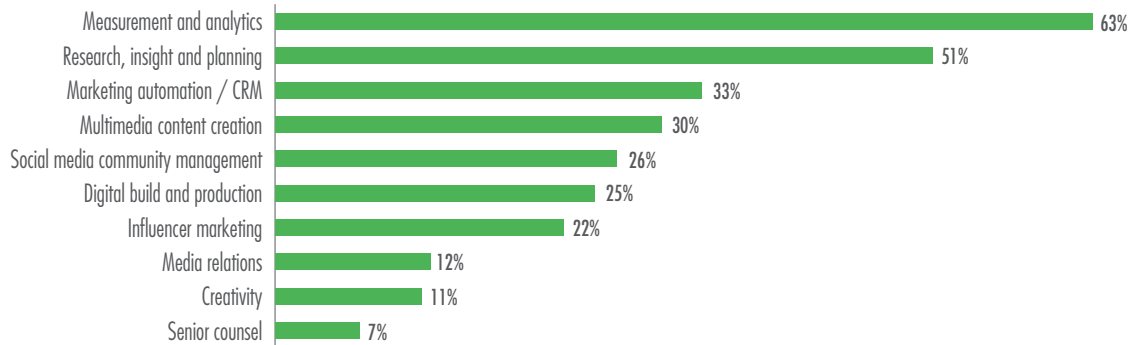
Most used B2B Social media platform



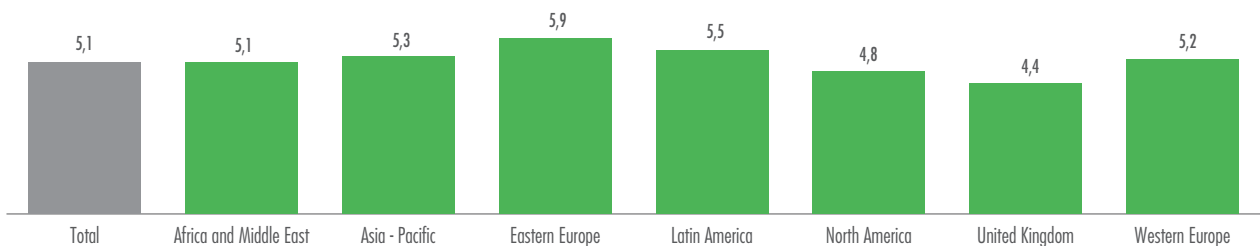
Most relevant technologies – future prediction



Technology having greatest impact – future prediction



Rating of adoption of new technology by regions



Rating out of 10, where 0 is poor at adopting technology and 10 is excellent

THE FUTURE OF COMMS IS HERE

React at the speed of news, personalise campaigns at scale, and integrate earned media across your organisation.

Turn PR into a business driver with the next generation **Cision Communications Cloud**[®] - the earned media solution for the modern communicator.

The Cision logo features the word "CISION" in a bold, teal, sans-serif font. The letter "I" is stylized with a vertical orange bar. To the left of the text is a solid orange arrow pointing to the right.

CISION[®]

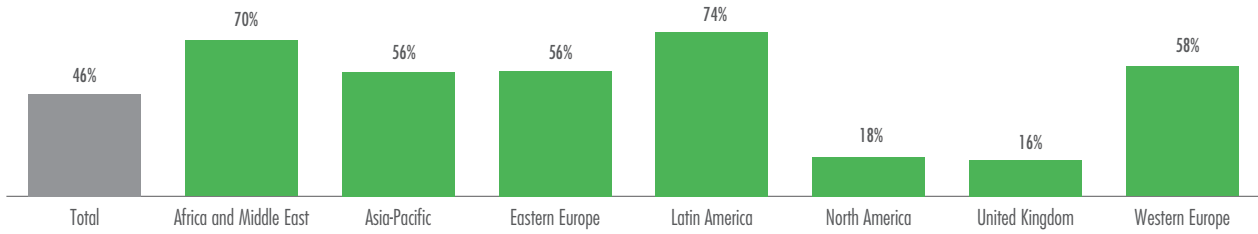
For more information and to set up a demo please contact:

MARKETINGUK@CISION.COM

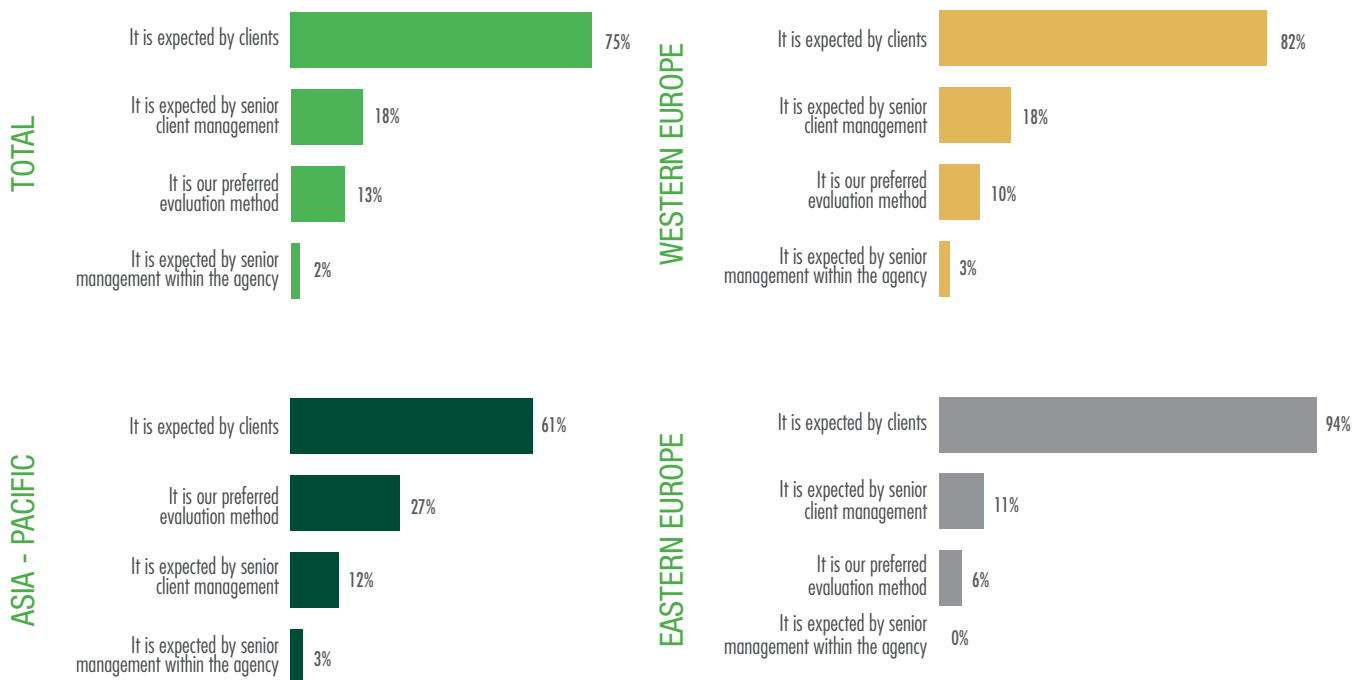


MEASUREMENT AND EVALUATION

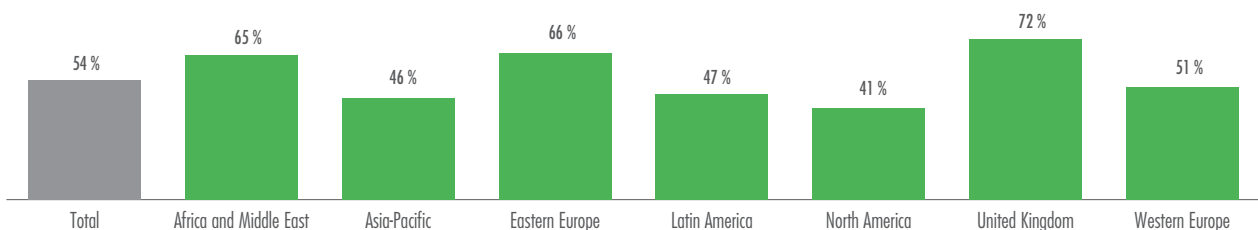
Use of AVEs by region



Reasons why AVEs are used



AMEC Tools and Principles



Measurement and analytics remain the area most cited for growth, opportunity, and additional investment, closely followed by research, insights, and planning. This is also the case for future talents and skill sets.

Both of these categories are closely related of course. Meaningful evaluation is impossible in the absence of clear and concise planning linking SMART objectives to clearly defined targets and KPIs. This is often cited as the PR industry's Achilles heel and is the reason that AMEC's latest educational initiative is on the importance of communications planning. Without a credible plan and clear objectives, clip counting and AVEs will continue to be accepted in some areas. AMEC's latest planning guide was launched as part of Measurement Month November 2019.

While it is great news that in North America and the UK AVEs remain in terminal decline, we have significant concern about this data that shows amongst ICCO members their use is prevalent in other global markets. AMEC worries that there is a real risk of a 'two-speed' global market developing – a market where some regions are leaping ahead with the use of credible and meaningful evaluation techniques while others are content to basically 'clip-count' and rely on invalid and discredited metrics.

This does no one any favours, least of all those utilising them in these regions. It shows the importance of AMEC's ongoing education remit, the need for our 'Say No to AVEs' campaign and the importance of our global partnerships with other trade associations, including ICCO.

Moving an industry that just ten years ago was using AVEs in over 80% of all global measurement programmes is not something that can happen overnight. It will be a long and hard battle where we all need to speak with one consistent voice and demand and expect meaningful measurement.

We value the help and support that ICCO provides in spreading the message about the importance of communications evaluation best practice amongst its global membership and we look forward to extending our partnership.

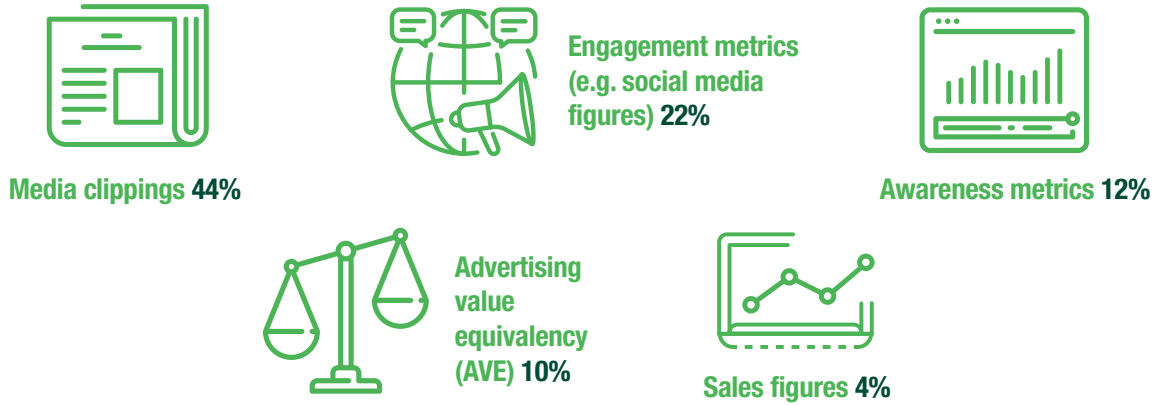


Richard Bagnall

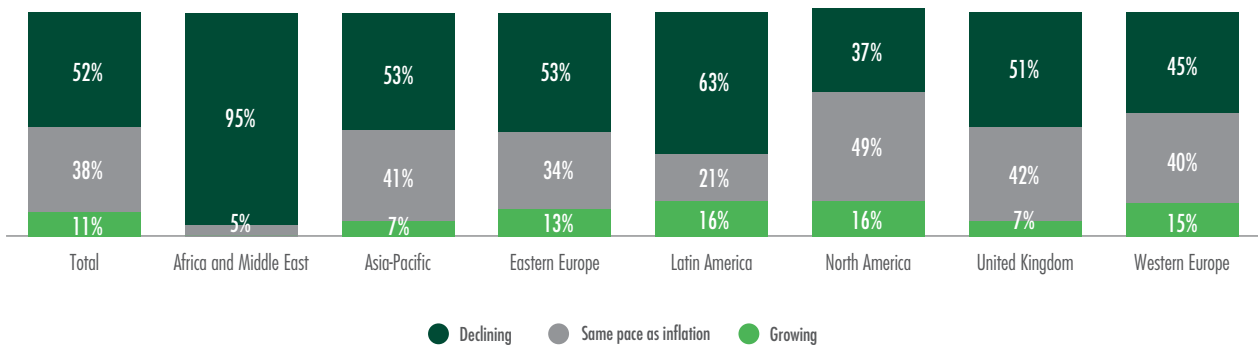
CHAIRMAN, AMEC & CEO, EUROPE AND THE AMERICAS, CARMA INTERNATIONAL

CLIENT REQUESTS

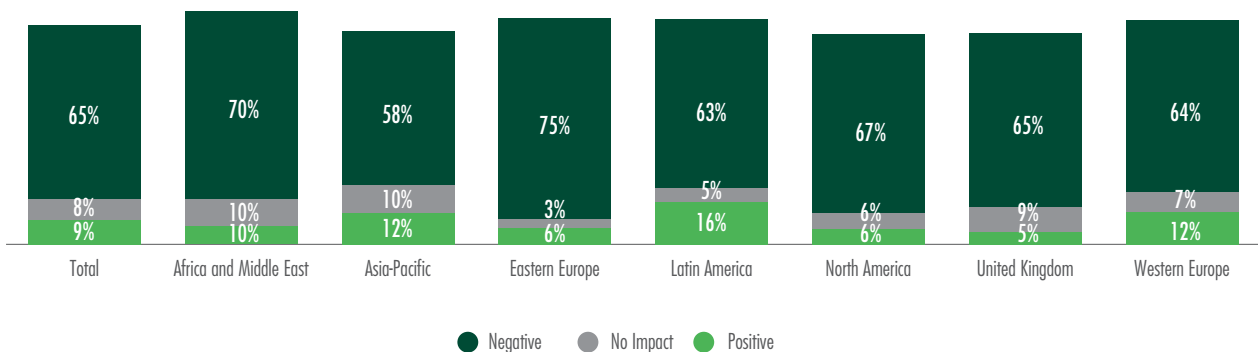
Most likely client requests



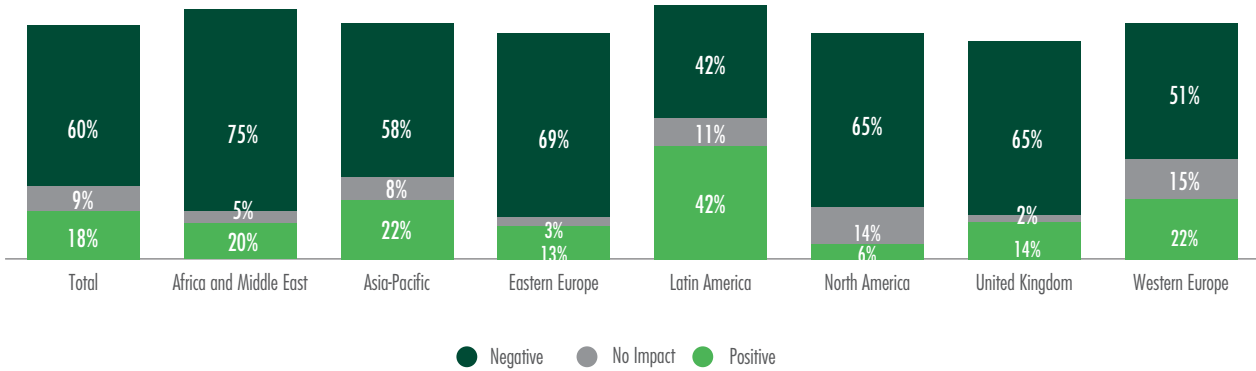
Status of client budgets with reference to inflation



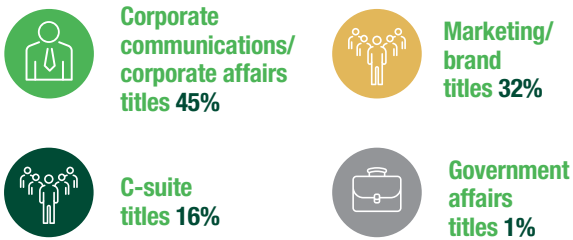
Impact of procurement on client budgets



Impact of procurement on agency- client relationships



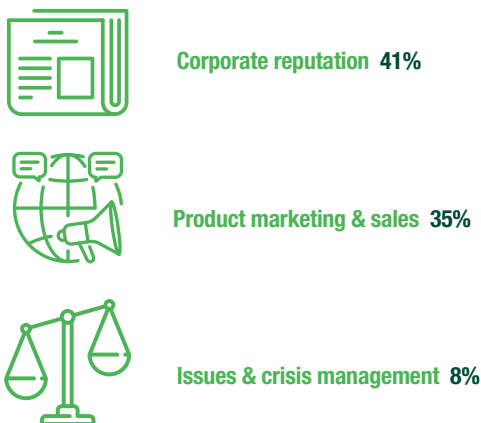
Current titles of client main contact



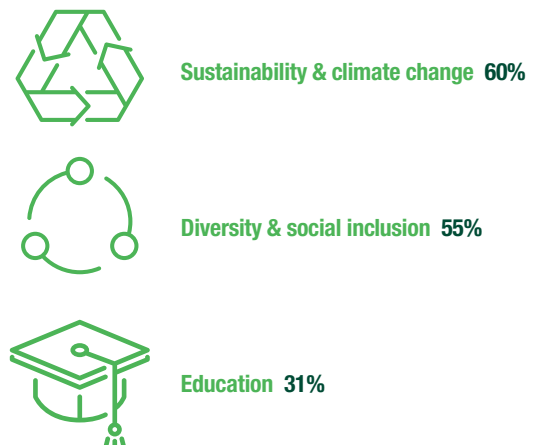
Future expectation of client main contact titles



Most important objectives for clients' public relations goals



Purpose and social issues clients are most likely to address





| REGIONAL RESULTS

Top 3 most commonly selected answers

1

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

1. Corporate reputation
2. Marketing Communications
3. Strategic Consulting

2

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

1. Strategic Consulting
2. Corporate Reputation
3. Social Media and Community Management

3

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

1. Multimedia
2. Social Media
3. Influencer Marketing

4

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

1. Economic conditions generally
2. Clients unwilling to commit sufficient funds
3. Inability to effectively measure impact of PR

5

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

1. Technology
2. Industrial/Manufacturing
3. Public Sector

6

In which of the following sectors do you expect to see the most growth over the next 5 years?

1. IT and Technology
2. Consumer Products
3. Industrial/Manufacturing

7

What do you think stops agencies from sourcing talent from outside the industry?

1. Expected salary levels are too high
2. Lack of transferable skills
3. Difficult finding quality, good value recruitment consultants

8

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

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

9

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

1. Data, measurement and analytics
2. Crisis Counsel
3. Social media community management

10

When it comes to purpose and social issues, which of the following are your clients most likely to address?

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

11

What is your most used B2B social media platform?

1. LinkedIn
2. Twitter
3. Facebook

12

What is your most used B2C social media platform?

1. Instagram
2. Facebook
3. Twitter

Top 3 most commonly selected answers

1

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

1. Corporate Reputation
2. Social media & community management
3. Strategic consulting

2

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

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

3

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

1. Influencer marketing
2. Multimedia Content creation
3. Research, insight and planning

4

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

1. Client unwilling to commit sufficient funds
2. Inability to effectively measure impact of PR
3. Staff retention

5

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

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

6

In which of the following sectors do you expect to see the most growth over the next 5 years?

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

7

What do you think stops agencies from sourcing talent from outside the industry?

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

8

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

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

9

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

1. Research, Insight and planning
2. Data, measurement and analytics
3. Creativity

10

When it comes to purpose and social issues, which of the following are your clients most likely to address?

1. Sustainability and climate change
2. Diversity and social inclusion
3. Data privacy

11

What is your most used B2B social media platform?

1. LinkedIn
2. Facebook
3. Twitter

12

What is your most used B2C social media platform?

1. Facebook
2. Instagram
3. LinkedIn

Top 3 most commonly selected answers

1

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

2

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

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

3

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

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

4

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

1. Economic conditions generally
2. Clients unwilling to commit sufficient funds
3. Competition from other marketing disciplines

5

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

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

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3. Research, Insight and planning

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2. Crisis Counsel
3. Social media community management

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1. Education
2. Sustainability and climate change
3. Healthcare

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What is your most used B2B social media platform?

1. LinkedIn
2. Instagram
3. Twitter

12

What is your most used B2C social media platform?

1. Instagram
2. LinkedIn
3. Facebook



Top 3 most commonly selected answers

1

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

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

2

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

1. Strategic consulting
2. Marketing communications
3. Multimedia content creation

3

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

1. Measurement and analytics
2. Influencer marketing
3. Research, insight and planning

4

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

1. Clients unwilling to commit sufficient funds
2. Staff recruitment
3. Inability to effectively measure impact of PR

5

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

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

6

In which of the following sectors do you expect to see the most growth over the next 5 years?

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

7

What do you think stops agencies from sourcing talent from outside the industry?

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

8

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

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

9

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

1. Research, Insight and planning
2. Data, measurement and analytics
3. Creativity

10

When it comes to purpose and social issues, which of the following are your clients most likely to address?

1. Diversity and social inclusion
2. Sustainability and climate change
3. Data privacy

11

What is your most used B2B social media platform?

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What is your most used B2C social media platform?

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Top 3 most commonly selected answers

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

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

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

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1. Influencer marketing
2. Creativity
3. Measurement and analytics

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

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

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

7

What do you think stops agencies from sourcing talent from outside the industry?

1. Expected salary levels are too high
2. Difficulty finding quality, good value recruitment consultants
3. Lack of interest from potential recruits

8

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

1. Hiring senior staff
2. Finding people from non-traditional backgrounds
3. Training/developing junior and mid-level staff

9

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

1. Creativity
2. Research, Insight and planning
3. Data, measurement and analytics

10

When it comes to purpose and social issues, which of the following are your clients most likely to address?

1. Sustainability and climate change
2. Education
3. Healthcare

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What is your most used B2B social media platform?

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What is your most used B2C social media platform?

1. Facebook
2. Instagram
3. LinkedIn



Top 3 most commonly selected answers

1

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

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

2

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

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

3

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

1. Measurement and analytics
2. Senior counsel
3. Multimedia content creation

4

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

1. Economic conditions generally
2. Inability to effectively measure impact of PR
3. Clients unwilling to commit sufficient funds

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

8

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

1. Retaining key talent
2. Finding people from non-traditional backgrounds
3. Hiring mid-level staff

9

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

1. Research, Insight and planning
2. Data, measurement and analytics
3. Media relations

10

When it comes to purpose and social issues, which of the following are your clients most likely to address?

1. Sustainability and climate change
2. Diversity and social inclusion
3. Data privacy

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2. Corporate reputation
3. Purpose and CSR

3

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

1. Measurement and analytics
2. Influencer marketing
3. Multimedia content creation

4

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

1. Clients unwilling to commit sufficient funds
2. Competition from other marketing disciplines
3. Staff recruitment

5

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

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

6

In which of the following sectors do you expect to see the most growth over the next 5 years?

1. IT and technology
2. Healthcare
3. Industrial/manufacturing

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

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2. Research, Insight and planning
3. Data, measurement and analytics

10

When it comes to purpose and social issues, which of the following are your clients most likely to address?

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THE NEW LAND OF OPPORTUNITY



Bridget von Holdt

SVP, BURSON COHN AND WOLFE
& AFRICA PRESIDENT, ICCO

Africa's economy over the last decade has featured countries that are the fastest growing economies in the world. In 2018, six African nations – Ethiopia, Ghana, Tanzania, Senegal, Ivory Coast and Djibouti grew remarkably.

The World Bank estimates economic growth in the Sub-Saharan regions to bulk out to a 3.6 percent average in 2019-20. To supplement the findings in the World PR Report, I will explain the context in which communicators must work.

Consumer spending is expected to hit \$25 trillion by 2025, Africa's emerging markets present excellent opportunities for international trade, mergers and acquisitions.

African Agriculture

While technology and fintech dominate in the survey, agriculture is powering the economic transformation across the Sub-Saharan continent. The United Nations forecast Africa's thriving agribusiness will be worth \$1 trillion by 2030.

The continent boasts 60% of the world's unused arable land and a favourable climate for growing fruit, vegetables and grain. The growth in agribusiness will create a surge of jobs within the supply chain and subsequently help to pull thousands out of poverty and starvation

Relaxed Borders

The Continental Free Trade Area (CFTA) makes import and export easier throughout Africa. To date, 44 countries have signed up to allow the free movement of trade and more are expected to join.

It is anticipated that the free flow of goods between South Africa and the rest of Africa, will help to maintain economic growth and promote the impetus to develop cross-border infrastructures thus further expanding Africa's emerging markets.

Affordable Housing

As the demand for jobs emerges in cities, more people are moving to urban areas which has increased the demand for accommodation.

The majority of Africa's housing development has been focused on premium segments and the growing middle-classes.

Authorities have refocused their attention and provide housing for workers with limited capital arriving from rural areas. The latest innovations include converted shipping containers to significantly cut the cost of building homes.

Automotive Africa

The mass migration of people moving to cities and the growth of internet shopping has created a growing demand for transportation.

Well-known brands including Mercedes, Volkswagen and Toyota are setting up assembly plants across the continent, the number of vehicle sales is projected to surpass 10 million units per annum in the next 15 years.

Fintech

Africa's financial services are largely underdeveloped. Only 34% of African populations own bank accounts or have access to formal financial services.

Subsequently, access to financial products is slow and inflexible. However, the spread of internet connectivity is helping to provide financial access that bypasses typical obstacles.

Africa's emerging fintech industry is powered by groups of entrepreneurs that provide innovative solutions to help businesses issue bills, create bulk disbursements, manage merchant payments and many other financial transactions.

STRONG GROWTH CONTINUES WITH CLIENT RELATIONSHIPS VITAL TO THE FUTURE

The public relations industry continues to perform well in the Asia Pacific (APAC) region. APAC is among the top three most upbeat markets after North America (7.7) and Latin America (7.2). On a scale of 1-10, the average for optimism around the PR market's growth is 7.0, on a par with the global average.

Growth drivers

Among industry sectors, technology is the top growth driver, followed by financial and professional services and consumer products. Agencies are performing well in offering services for corporate reputation, social media & community management, and strategic consulting. Seventy percent of the agency heads say corporate CEOs are taking corporate reputation seriously.

Even though it is an intangible concept, reputation gauges the degree of trust that the public hold for a brand, explaining why 70% percent of the agency heads in Asia say companies are paying more attention to corporate purpose fuelling demand for senior counsel from PR firms.

Challenges

Client-agency relationships are a huge issue. Fifty-three percent of agency heads say clients are unwilling to commit enough funds, up from last year's 38%, while 58% believe procurement is causing a negative impact on client budgets and an equal number of respondents believe that procurement is negatively impacting client-agency relationship.

Another reason for clients not committing to funds is our inability to effectively measure the impact of PR and prove our value. Fifty-eight percent of agency heads in APAC are still using AVEs and only 46% use AMEC. The main reason given for the continued use of AVEs is that it is expected by clients (61%). Though the number of PR agencies using AVEs is steadily coming down, we need to quickly adopt more sophisticated methods of evaluation.

Talent continues to be a cause for concern. On a scale of 1-10, the average for availability of talent in APAC is 5.1 compared to a global average of 5.7. Retaining key staff is the top talent-related challenge, followed by training and developing mid-level staff and hiring mid-level staff. This will continue to remain a challenge until we and our clients together elevate ourselves, so that we can bring in more revenue and bigger retainers in order to pay enough to get good talent.

Future trends

In the next five years, agency heads predict that IT and technology, financial and professional services and healthcare sectors will grow exponentially. Healthcare PR is a recent growth driver among many of the multinational agencies operating in the region. A rapidly aging population in some APAC countries and increased public demand for better healthcare and reforms are making the sector more important to PR agencies. The industry will continue to see growth in corporate reputation, strategic consulting



Nitin Mantri

CEO, AVIANWE &
PRESIDENT, ICCO

and social media & community management the next five years.

Conclusion

In the coming years, predictive AI, data science, SEO, process automation, and internet of things will open new perspectives and opportunities for the PR industry. But with that comes responsibility. As strategic advisors to clients, we must ensure that our clients use these technologies ethically.

Furthermore, we must never forget that PR is a relationship-based profession. We need both technology and people to engage and influence. While technology will make our work easier, human interface will always be at the heart of our business. More so in Asia, where human relationships and emotional connections are of primary importance.



SPECIALISE IN MANAGING REPUTATIONS, INCLUDING YOUR OWN



Jürgen Gangoly

**MANAGING PARTNER,
THE SKILLS GROUP GMBH
NORTH AMERICA & EUROPE
PRESIDENT, ICCO**

Across Europe, public discussion and business decisions have been influenced or dominated by Brexit this year, and an even more unpredictable international business environment. The communications industry and its agencies are used to deal with complex issues. We are to provide advice to clients on how to steer companies or institutions through rough waters. This is also what the results of this World PR report for the European region show.

Experts in the region are optimistic about the further growth of the PR market with a rating of 7/10, and almost the same amount of agency leaders expect an increase in profitability, all positive signs when economic conditions in certain parts of Europe are having a severe impact on many other industries.

When the seas get rougher and the landscape increasingly unpredictable, the quality of the crew becomes more apparent and the captain takes on fresh scrutiny to ensure a steady course. This is why client CEOs take corporate communications more seriously than ever, and why professional, strategic communications consultants are needed desperately across all sectors in Europe.

The “purpose discussion” initially led by industries in the US, is bubbling to the surface in mainland Europe as well, adding new objectives and perspectives to what clients require of their agencies.

This new focus on purpose paired with a desire to be perceived as sustainable and environmentally clean has been spurred on by rampant activism across Europe and will be both the fuel and the primary challenge for communicators in Europe.

The World PR Report shows, the industry experts in Europe – as in other parts of the world – are not convinced yet, that we will be successful in retaining and attracting the talents we need to develop further and grow our business. Only about 50 per cent say we do a proper job sourcing enough talents from outside our industry – one of the lowest self-ratings in the entire report.

Of course, technology also remains at the top of the agenda. Are we adapting to new technologies at an appropriate pace? 60 to 70 per

cent of European communications experts say “Yes, we do! But what is “appropriate” and what is the “new technology” we need to invest in after all? When we answer these questions, they often spawn new questions. Plenty to discuss the future ICCO summits, that’s for sure.

“Social media” and “Community management” continue to snowball in the region, and there is a certain uncertainty that “Measurement” and “Influencer marketing” will be the areas where investments make sense and are needed. All this again feeds the notion that influencing and shaping the reputation of clients in more nuanced ways will be our primary focus.

The data shows 60 to 70 per cent of the communications industry leaders are convinced that we are working ethically correct. However, independent trust surveys rank PR professionals at the very end of their lists all over Europe. Alongside clients, our own reputation is also to be improved therefore! The results show the industry needs to take a clear stance on fake news discussion and needs to regain its role as credible sources for journalists, wider media, decision-makers and public institutions if we are to take advantage of all the opportunities that lay ahead.

DIGITAL INFLUENCE IS EVERYTHING

We live in a world where digital spaces decide the fate of industries, and of all the sectors that have been shaped by digital innovations, marcomms have been among the most affected, presenting a spectrum of approaches and methodologies that not only push the industry's envelope but also reinvent how we consume information and the mediums with which we do so.

Where seasoned professionals seek to take advantage of the platforms du jour, incorporating strategies and industry know-how to devise optimal processes to take advantage of the medium — as per the ICCO World PR Report, corporate responsibility (42%) and strategic consulting (29%) remained some of the most important areas of growth for the industry last year — a demographic was silently taking shape to become the mouthpiece of the industry at large.

The rising popularity of platforms like Facebook, YouTube, Instagram, Snapchat, and Twitter created a class of content creators who craft their own stories, bridging the gap between an elusive audience with temperamental interests and a corporate thirst to spread news organically and as seamlessly as possible. Essentially, those men, women, and children took the limelight and transitioned from opinionated consumers to brand ambassadors who could as easily tilt an audience's interests to favour something as they would encourage them to boycott a product.

Brands did not sit idly by for long. No sooner had the nomenclature 'influencer' was revealed did they start collaborating with these content creators across their channels of choice.

Such has been the impact that influencer marketing has grown from a supplementary marketing method to a fully-fledged industry worth up to \$10 billion.

As a result, influencer marketing is consistently gaining more traction, with marketers planning to increase their budgets, consolidated by reports stating that 65% of influencer marketing budgets have increased in 2019, a rise from 39% in 2018. Facebook (38%) and Instagram (27%) were recorded as the most utilised B2C social media platforms, while LinkedIn (59%) and Twitter (15%) remained the most commonly used B2B platforms.



Ahmad Itani

**CEO AND FOUNDER,
CICERO & BERNAY & VICE
CHAIRMAN, PRCA MENA**

Conventional science dictates that what comes up must come down, but this is just the tip of the potential lying in the hands of content creators. Where detractors insist that the era of influencers is fading into oblivion, emphasising a growing lack of integrity or trust in what they do, the numbers and analytics reveal otherwise. Their understanding of trends and the online community is second to none, and if a brand selects the right individuals to work with, it has the world to gain.



STRATEGIC PR CONSULTING POTENTIAL, AMID POLITICAL MAELSTROM



Mary Beth West

SENIOR STRATEGIST,
FLETCHER MARKETING PR

Opportunities for North American public relations firms to seize upon clients' communications challenges to advance corporate reputation and secure agency growth are as diverse as the continent's political spectrum of current executive-office holders.

Among them: the left's victory by Andrés Manuel López Obrador as Mexico's president in July 2018; the left's Justin Trudeau having secured re-election as Canadian Prime Minister in October 2019; and 2020 promising to be a divisive-as-ever contest for the U.S. Presidency. A bumper crop of candidates currently in the Democratic field seek to unseat the right's President Donald Trump and current Republican majorities in both the U.S. Senate and state governorships.

Indeed, the excessive confluence of unabashed, partisan politics with business, societal, media and consumer issues cannot be understated in the North American market – right down to political fisticuffs about which athletic shoe brand to purchase (or protest), for example.

Practically any matter undertaken as part of a public relations strategy, program or even tactical effort must surmise and integrate every political nuance, insinuation, ideology and risk.

The good news: budgets funding the requisite PR analyses and campaigns for brands to achieve social relevance and balance may benefit from the larger U.S. economy's tempered yet resolutely firm growth trajectory (as issued by The Conference Board, the U.S. 2020 growth forecast is 2 percent).

By necessity, clients will continue to demand ever-more sophisticated communications solutions to business and societal challenges.

For North American PR firms, the question is, how will we meet resulting workforce demands?

ICCO's most recent North American agency data reveal that among the service areas in which agencies expect to see the most growth

over the next five years, "Strategic Consulting" ranks first; yet "clients' persistent lack of willingness to commit sufficient funds" to develop and execute the best, most creative and well-informed strategies tops the list of challenges across markets. Firms are responding by placing higher investments in measurement and analytics, in part to make quantitative cases for budget.

PR agency workforce development means identifying, recruiting and retaining the appropriately educated and experienced workforce to deliver "Strategic Consulting" insights, impact and boots-on-the-ground implementation / oversight.

The industry faces an uphill battle on that front, with "Hiring mid-level staff" ranking first among North American agencies' critical talent challenges – followed by "Retaining key talent" and "Training / developing junior to mid-level staff."

Diversity and Inclusion (D&I) ranks first among "purpose and social issues" that clients are most likely to address – even as PR firms themselves continue to struggle mightily with their own D&I outcomes. Patience is wearing thin with decades-long industry lip service, alongside stagnant results. A shake-up may be on the horizon in 2020, with fresh, urgent demands for substantive progress disrupting stale D&I platitudes.

DESPITE REGIONAL ECONOMIC INSTABILITIES, LATIN AMERICAN PR AGENCIES ARE PREDOMINANTLY OPTIMISTIC

When it comes to nominating the greatest challenge in their markets, PR agencies from Western Europe (excluding the UK), Eastern Europe, North America and Asia-Pacific point to the unwillingness of clients to commit sufficient funds. For agencies in Latin America, however, the main challenge is “Economic conditions generally”.

It's not hard to understand why. Traditional economic ups and downs in the region's countries have always been a concern for agencies, given the direct and immediate impact instabilities represent to business. Some figures help to translate this view. Latin American GDP grew only 0.9% in 2018 and forecasts for 2019 are limited to 0.5% growth. In addition, 63% of agencies in the region say clients budgets are declining with reference to inflation (21% think budgets are at the same pace of inflation and only 16% see an increase).

Despite that view on business environment, Latin American agencies are more optimistic about the growth of the PR market (7.2 on a scale from 0 to 10) compared to the global average of 7.0. And even more optimistic regarding profitability (7.3 in the region versus the global average of 6.7).

The same positive perception can be seen regarding the possibility of seeing clients turning to public relations firms to lead non-traditional services (6.4 compared to 6.0 on global average). PR agencies in Latin America predominantly believe they

are successfully addressing clients' digital needs (6.3 versus 6.0) and that the PR industry is adapting to new technologies at an appropriate pace (6.6 in the region, 6.0 global average).

Regarding business growth in 2018, the main performance was in the “Corporate Reputation” area. And “Technology” was the most prominent sector in the advancement of business.

The adoption of innovative solutions and technologies has been more and more on the radar of the PR industry in Latin America. Multimedia content creation is considered the most relevant area for agencies to invest in 2019.

IT & technology is the sector in which Latin American agencies expect to see the most significant growth over the next 5 years. Agencies expect ‘Corporate Reputation’ to be the area of special growth over the next 5 years.

It should be noted that ease of access and the simplified character of social media have played an important role for communication within the region, since the illiteracy rate reaches considerably high levels. According to recent information from the statistics branch of Unesco, 36% of Latin American children in elementary school are unable to reach the minimum reading skill levels. So the friendly use allowed by internet channels contributes to narrow down that gap, helping not only citizens but also companies and governments to connect to broader audiences.



Ciro Dias Reis,
FOUNDER, IMAGEM
CORPORATIVA

Looking at the next decade PR companies in the region consider “data, measurement and analytics” the most relevant skills to be achieved by their professionals.

When asked about the most used B2B social media platforms Latin American agencies put LinkedIn first, followed by Instragram and Twitter. Regarding B2C platforms, the most used are Instagram, LinkedIn and Facebook.



BROADENING HORIZONS, SKILLSETS AND EXPECTATIONS



Matt Buchanan

HEAD OF PR AND
INFLUENCE, OGIIVY UK

At the time of writing, we know Brexit uncertainty persists, which means we have been in a state of flux for more than three years since the Referendum. A look at the domestic media frenzy around this thorny topic would suggest that uncertainty, stagnated growth and operational difficulties would be the order of the day. However, the UK PR landscape has once again witnessed a stellar year of growth and evolution, with 2020 set to be the healthiest and most exciting in recent memory.

The results show that the growing importance of corporate reputation, to both clients and agencies alike. The UK has been at the forefront of this growth for years, with an acceleration driven by the necessity for all businesses to define their purpose. Consumers are demanding change, something that has been very evident with the recent

climate change marches that have taken place in London this year. So it's no surprise to see sustainability and climate change sitting at the top of the list of expected focus areas for clients in the coming year. Consumers expect businesses and brands to lead the charge where world leaders aren't moving fast enough.

This expectation of brands to drive social change will see them come under more scrutiny than ever. In turn, this will signal an industry shift towards the business of 'reputation management'. PR agencies must be wary of the land-grabbing from consultancies. Reputation management is our heartland, and it is an area I hope and expect to see the industry thrive in, helping businesses evolve.

Once again, we see measurement and evaluation identified as a vital area for investment. While we have all read much on how earned is finally getting the respect it deserves, this will only be more widely converted to taking a seat at the top table, if all activity is rooted in robust effectiveness metrics.

Finding the right people to implement this will be crucial. We must continue to invest in specialist skills and disciplines within PR practices. From dedicated strategists and creatives, to data analysts; the briefs we are getting are more varied. Clients are turning to their PR agencies to deliver 'non-traditional' PR services, and we are

becoming more confident in our ability to meet these new demands. The agencies that can offer these wider, blended skillsets will reap rewards.

The political landscape clearly has some bearing on concerns about the economic challenges that might lie ahead. This goes hand in hand with the people continuing to be the most important thing we have, and where attention and investment should be focused. Retaining talent has always been a challenge and will continue to be, but we should be striving to widen the pool and attract and retain the best talent not only from our industry but also beyond.

Looking at how we approach attracting from non-traditional backgrounds will be key in creating a competitive advantage. It is pleasing to see the UK leading the way with more female leaders and ethnically diverse leaders than ever before, but there is much work to be done.

I strongly believe that the UK can play a central role in the growth of our industry globally over the next decade. Despite Brexit, it is well placed to continue to be a hotbed of great talent, an important hub in developing global campaigns, and filled to the brim with creative inspiration.

The future looks brighter than ever.



C-SUITE CORPORATE REPUTATION SURVEY

These results are based on findings from an online survey conducted amongst 600 C-Suite personnel in companies with 1,000+ employees and \$10m+ turnover across 12 countries





Alison Clarke

ALISON CLARKE
CONSULTING

It's exciting to support the launch of the first ICCO global survey looking at sentiment around reputation and the importance of the communications function at senior management level across a wide range of countries and sectors.

As communications professionals I'm sure you will share a sense of reassurance and dismay at the findings. Whilst encouraging in so many ways there is still a great deal of work to do to engage senior management in the importance of their reputation being at the centre of business planning, actions and behaviours.

It's a comprehensive sample of 600 C-Suite executives across 12 countries in companies with more than 1000 employees. These are sizeable businesses for whom reputation really can support or hamper their business ambitions. This makes some of the results even more surprising.

While the presence of a PR function within the senior management team is a relatively healthy number, there are some distinct anomalies with low representation in markets such as USA, Canada and Brazil.

When reviewed further it is no surprise to see reputation is given senior attention in sectors such as retail, IT, food and drink and financial services to name a few.

However the Utilities and Healthcare sectors lag behind which is worrying given the challenges they face around trust. These findings suggest it's high time they put their communications and engagement strategies at the senior management table.

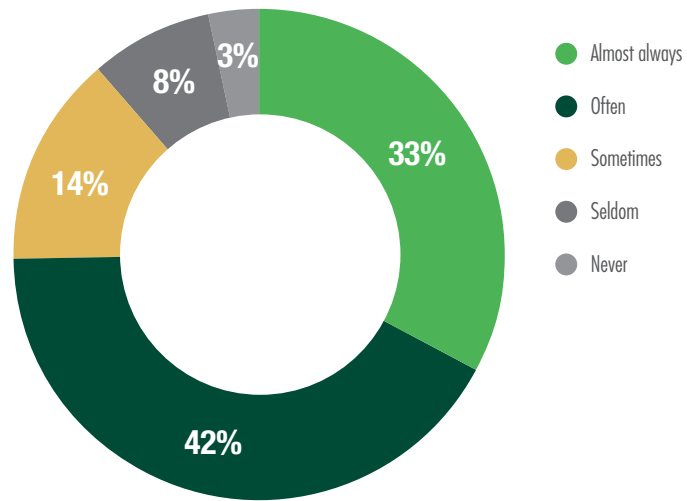
Those markets committed to a senior PR function clearly value it and associate the health of their reputation directly with the work of their communications team. When reviewing by sector the same pattern emerges. Those that respect the importance also value the contribution it makes to their business. Once again Healthcare and Utilities fall short of so many other industries.

Reputation is an important part of setting long term business strategies for many by market and by sector although it is disappointing that only 33% say they always consider it. Even more concerning is it seldom or never features in business planning for some.

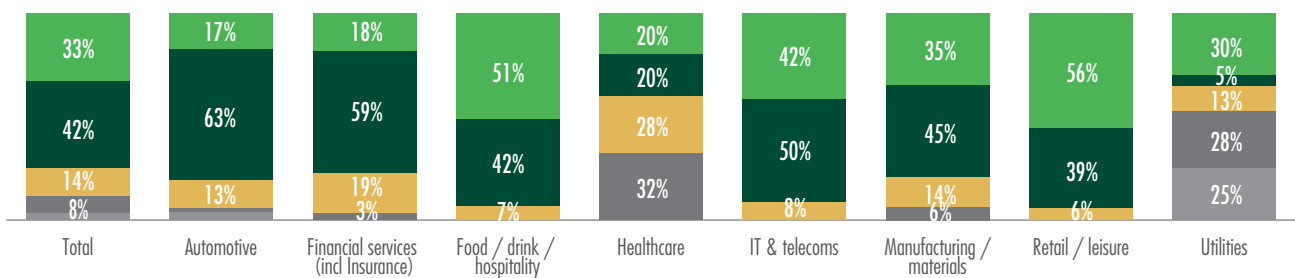
So draw your own conclusions. As an industry we may be pleased that the power and importance of what we do is recognised and respected in so many geographies and industries. However there are some major world markets and challenged sectors that should be prioritising this as a matter of urgency.

As public trust in corporations and governments comes under ever increasing scrutiny we must all continue to raise the profile of what we do, uphold the highest ethical standards and celebrate how successful organisations see real results from the right behaviours and a credible, positive reputation.

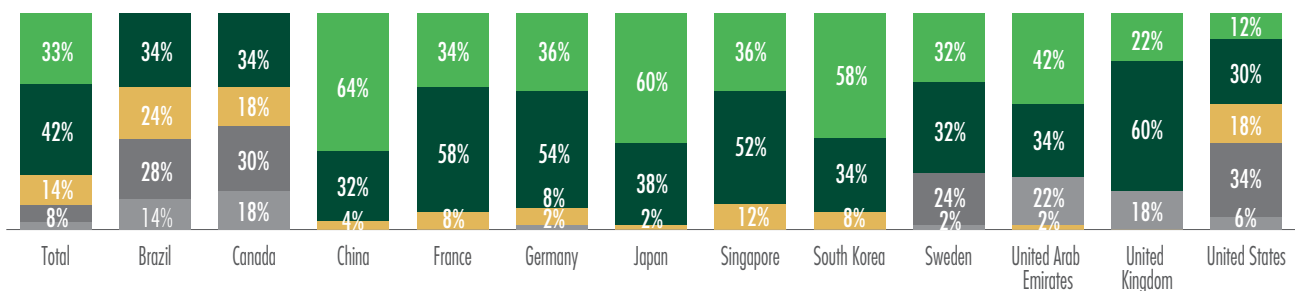
How much are reputation and communications challenges meaningfully considered when setting and reviewing your long-term business strategy?



How much are reputation and communications challenges meaningfully considered when setting and reviewing your long-term business strategy by sector



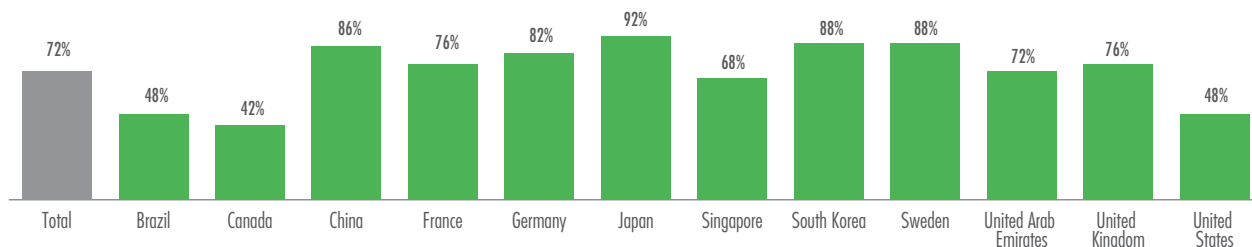
How much are reputation and communications challenges meaningfully considered when setting and reviewing your long-term business strategy by country



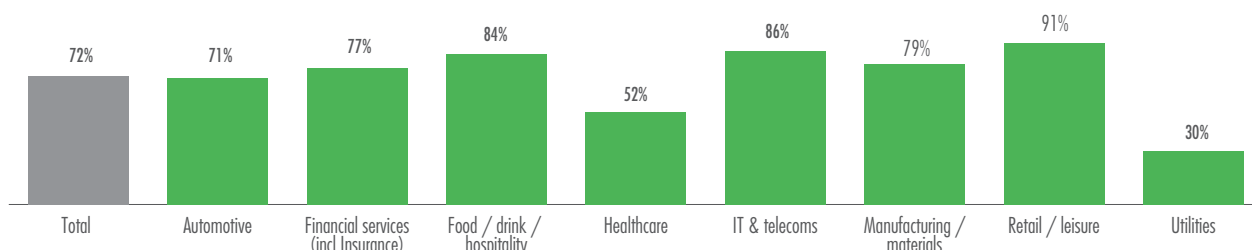
Legend: ● Almost always ● Often ● Sometimes ● Seldom ● Never

REPUTATION SURVEY

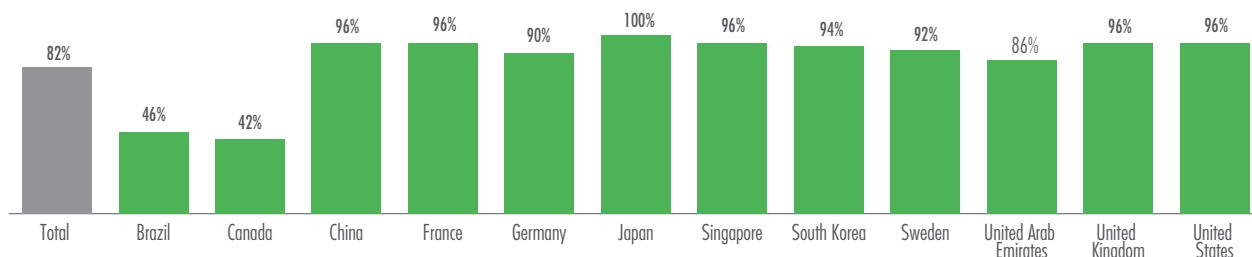
Those who have a PR function in senior management team by country



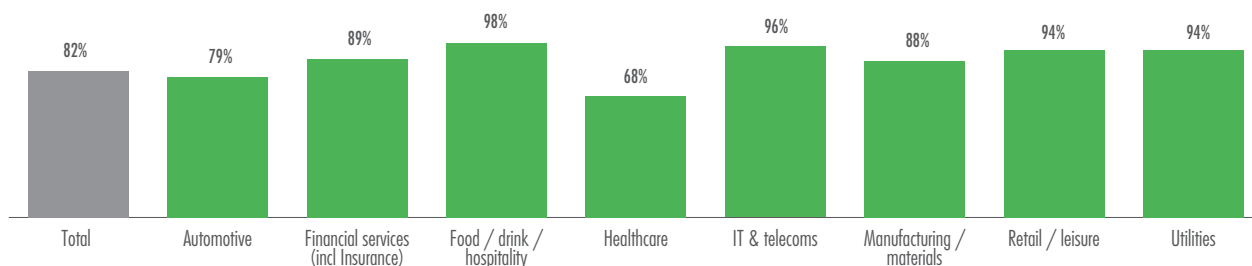
Those who have a PR function in senior management team by sector



Do you associate the reputation (good or bad) of your business, directly with the work of the Communications and PR functions within your business by country



Do you associate the reputation (good or bad) of your business, directly with the work of the Communications and PR functions within your business by sector



DIRECTORY OF ICCO MEMBERS

COUNTRY // REGION	TRADE ASSOCIATION	WEBSITE	EMAIL
Armenia	Armenian Public Relations Association (APRA)	apra.am	info@apra.am
Australia	Public Relations Institute of Australia (PRIA)	pria.com.au	membership@pria.com.au
Austria	Public Relations Verband Austria (PRVA)	prva.at	info@prva.at
Belgium	Belgium Public Relations Consultants Association (BPRCA)	bprca.be	info@bprca.be
Brazil	Brazilian Association of Communication Agencies (ABRACOM)	apracom.org.pr	contact@apracom.org.pr
Bulgaria	Bulgarian Association of Public Relations Agencies (BAPRA)	bapra.bg	office@bapra.bg
Canada	Canadian Council of Public Relations Firms (CCPRF)	ccprf.ca	judylewis@strategicobjectives.com
Czech Republic	Czech Association of Public Relations Agencies (APRA)	apra.cz	info@apra.cz
Denmark	Public Relations Branchen	publicrelationsbranchen.dk	dmj@danskerhverv.dk
Finland	The Finnish Association of Marketing, Technology (MTL) and Creativity	mtl.fi	info@mtl.fi

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COUNTRY // REGION	TRADE ASSOCIATION	WEBSITE	EMAIL
France	Syntec Conseil en Relations Publics	syntec-rp.com	office@groupment-syntec.org
Georgia	Association of Communications Agencies Georgia (ACAG)	www.acag.ge	e.zhvania@gepra.ge
Germany	German Public Relations Association (GPRA)	gpra.de	info@gpra.de
Greece	Hellenic Association of Communications Agencies (EDEE)	edee.gr	edee@edee.gr
Hungary	Hungarian PR Association (HuPRA/ MPRSZ)	mprsz.hu	mprsz@mprsz.hu
India	Public Relations Consultants Association of India (PRCAI)	prcai.org	jayoti.lahiri@prcai.org
Ireland	Public Relations Consultants Association of Ireland (PRCA)	prcai.ie	info@prcai.ie
Italy	Italian Association of Public Relations Agencies (Assorel)	www.assorel.it	info@assocom.it
Italy	Association of Communications Companies (Assocom - PR Hub)	www.assocom.org/ www.prhub.it	andi@prcouncil.net

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COUNTRY // REGION	TRADE ASSOCIATION	WEBSITE	EMAIL
Kazakhstan	National Public Relations Association of the Republic of Kazakhstan (HACO)	nazo.kz	asel@pressclub.kz
Middle East and North Africa	Public Relations and Communications Association Middle East and North Africa (PRCA MENA)	prca.mena.global	melissa.cannon.prca.mena.global
Mexico	Confederation of the Marketing Communication Industry	cicom.org.mx	lcarreno@cicom.com.mx
Netherlands	Dutch Association for PR and Communications Agencies (VPRA)	vpri.nl	info@vpri.nl
Nigeria	Public Relations Consultants Association of Nigeria (PRCAN)	prcan.ng	prcan.ng@prcanng.com
Norway	Certified Communicatins Agencies Association (KOMM)	abelia.no	post@abelia.no
Poland	Zwiazek Firm Public Relations (ZFPR)	www.zfpr.plw	katarzyna.rudzik@zfpr.pl
Portugal	Portugese Association of Business Council	www.apecom.pt	sofia.barros@apecom.pt
Romania	Romanian Public Relations Association (ARRP)	arrp.eu	arrpoffice@gmail.com
Russia	Association of Consultancies in the Field of Public Relations (AKOS)	akospr.ru	director@akospr.ru

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COUNTRY // REGION	TRADE ASSOCIATION	WEBSITE	EMAIL
Serbia	Public Relations Society of Serbia (DSOJ/PRSSRB)	pr.org.rs	drustvo@pr.org.rs
Slovakia	Association of Public Relations Slovak Republic (APRSR)	aprsr.eu	info@aprsr.eu
Southern Africa	The Public Relations Institute of Southern Africa (PRISA)	prisa.co.za	info@prisa.co.za
South East Asia	Public Relations and Communications Association South East Asia	prca.seasia.global	tara.munis@prca.seasia.global
Spain	The Association of Communications and PR Consultancy Companies (ADECEC)	adecec.com	adecec@adecec
Sweden	The Association of Public Relations Consultancies in Sweden	precis.se	info@precis.se
Switzerland	Association of Swiss PR Agencies (BPRA)	bpra.ch	info@bpra.ch
Turkey	Communications Consultancies Association of Turkey (IDA)	ida.org.tr	ida@da.org.tr
United Kingdom	Public Relations and Communications Association (PRCA)	prca.org.uk	francis.ingham@prca.org.uk
United States	PR Council	prcouncil.net	kristin@prcouncil.net

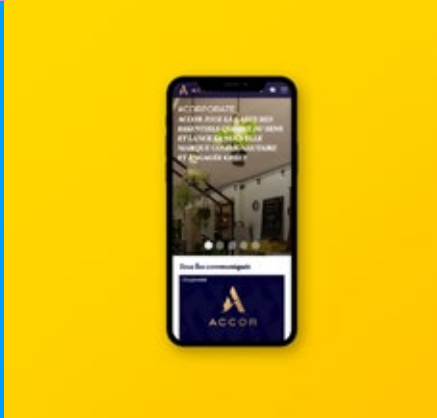
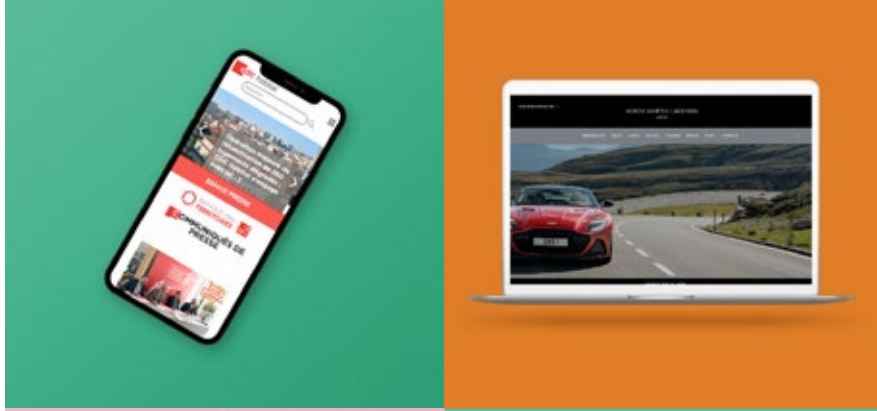
DIRECTORY OF ICCO MEMBERS

	NAME	CONTACT PERSON	CONTACT DETAILS
	Creative Culture	Mélanie Chevalier	195-197 Victoria St, Westminster, London SW1E 5NE, +44 20 7798 2000 www.creativecultureint.com
 GlobalComPR Network	GLOBALCOM PR NETWORK	Ralf Hartman	Coordination HQ Muenchener Str. 14 85748 Garching Bei Muenchen Germany +49 89 3603 6350 www.gcpr.net
	GOLIN	Bibi Hilton	2 Waterhouse Square 140 Holborn London EC1N 2AE United Kingdom +44 20 7067 0600 www.golin.com
	GRAYLING	Sarah Scholefield	29-35 Lexington Street London W1F 9AH United Kingdom +44 20 7025 7500 www.grayling.com
	HILL+KNOWLTON STRATEGIES	Sam Lythegoe	The Buckley Building 49 Clerkenwell Green London EC1R 0EB United Kingdom +44 20 7413 3000 www.hkstrategies.com
 THE GLOBAL COMMUNICATIONS AGENCY	HOTWIRE	Andy West	69 Wilson Street London EC2A 2BB United Kingdom +44 20 7608 2500 www.hotwirepr.com
	INSTINCTIF PARTNERS	Tim Linacre	65 Gresham St London EC2V 7NQ United Kingdom +44 20 7457 2020 www.instinctif.com
 ADVANCING INTERESTS	INTEREL GROUP	George McGregor	Interel Group Greencoat House, Francis Street London, SW1P 1DH United Kingdom +44 20 7592 3800 www.interelgroup.com

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	NAME	CONTACT PERSON	CONTACT DETAILS
	IPREX	Andrei Mylroie	315 West Riverside, Suite 200, Spokane, WA 99201, USA +1 414 755 2170 www.iprex.com
	MWWPR	Patrick Herridge	56a Poland Street, 2nd floor London W1F 7NN United Kingdom +44 20 7046 6080 www.mww.com
	OGILVY	Michael Frohlich	Sea Containers, 18 Upper Ground London SE1 9RQ United Kingdom +44 20 3193 3000 www.ogilvy.com
	SERMO NETWORK	Tanya Hughes	3-5 Rathbone Place London, W1T 1HJ United Kingdom +44 20 7268 6100 www.sermocommunications.com
	HILL+KNOWLTON STRATEGIES	James Shackelford	54 W.40th Street, New York, NY 10018, USA 212-920-5344 www.somacomm.com
	SPN COMMUNICATIONS	Andrey Barannikov	Ryady Soldatenkova Building Danilovskaya Manufactura Business Centre 9/1, Varshavskoye Shosse 117105, Moscow, Russia +7 495 510 22 00 www.spncomms.com
	Newington Communications	Mark Glover	96 Great Suffolk St, London SE1 0BE, UK +44 20 7234 3333, www.newingtoncomms.co.uk
	THENETWORKKONE	Paul Squirrell	48 Beak St, Carnaby London W1F 9RL United Kingdom +44 20 7240 7117 the.networkkone.com
	WEBER SHANDWICK	Rachel Friend	2 Waterhouse Square 140 Holborn London EC1N 2AE United Kingdom +44 20 7067 0000 www.webershandwick.com

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