
WORLD PR REPORT

JULY 2013

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ADVERT

WORLD PR REPORT

JULY 2013

CONTENTS

03 Foreword

by Paul Holmes

05 Foreword

by Rob Flaherty

00 Global Rankings

00 Global Overview

00 Trends and Attitudes

00 Opportunities and Challenges

00 Regions and Markets

00 Appendix

EDITORIAL

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FOREWORD

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Rob Flaherty

Title, Organisation

GLOBAL RANKINGS METHODOLOGY

One critical decision we made when the ranking project began was to define public relations broadly. This decision was grounded in the philosophical approach of The Holmes Report, which believes that public relations includes all of the activities in which an organization engages in order to strengthen its relationship with any public or stakeholder group.

Thus, public relations fee income includes not only fees derived from traditional PR activities (media relations, community relations, employee communications, investor relations, public affairs) but also fees (but only fees) related to activities such as research, design, advertising and social media relations—as long as those activities were carried out by a firm whose primary activity is public relations.

We have always considered advertising, for example, to be a perfectly legitimate tool of public relations management. Indeed, many in-house public relations departments have responsibility for substantial advertising budgets, particularly when the advertising is designed to meet corporate or public affairs objectives rather than marketing or sales objectives. It would therefore be illogical to exclude fees related to advertising from a broad and inclusive ranking.

So the precise wording on the rankings form provided to participating agencies was as follows: “The Holmes Report defines public relations broadly as any activity designed to help corporations and other institutions build mutually-beneficial relationships with their key stakeholders, including but not limited to customers, employees, shareholders, legislators and regulators, communities, and the media. “The primary business of a public relations firm for the purposes of this document should involve either strategic, media-neutral counsel or earned media, but a public relations firm may engage in a wide range of activities including but not limited to media relations, sponsorship, advertising, corporate identity, web design, and research. However, firms may include only the fees for this work, not payments related to media buys, production, etc.

“The Holmes Report reserves the right to make its own judgment about whether a firm qualifies as a public relations firm for the purposes of these rankings, and to exclude firms it considers not properly qualified.” This is a broader definition than the one used by many other organizations providing local market rankings of public relations firms, which means that several of the firms providing numbers to The Holmes Report will receive credit for income not included in other rankings. The numbers for Edelman, for example, include fees from its StrategyOne research division and its Blue advertising unit, adding between \$7 million to the more tightly defined fee income reported to O’Dwyer’s newsletter. There were several obstacles to complete accuracy, the most obvious of which is the decision of the largest publicly-traded holding companies to interpret the Sarbanes-Oxley regulations in the United States in such a way that they preclude the release of information about specific operating units.

In truth, there is nothing in Sarbanes-Oxley that prevents the release of information. Indeed, some publicly-traded communications companies do continue to provide information about individual public relations brands. For the very largest companies, such as WPP, Omnicom, and Interpublic, the issue appears to be one of cost—the expense associated with ensuring the accuracy of published numbers—rather than legal prohibition. Needless to say, none of the Sarbanes-Oxley restricted holding companies or their PR firms co-operated in the creation of this ranking, and so The Holmes Report was compelled to rely on several sources to compile a ranking that it believes to be broadly accurate. Among the information sources on which we drew:

- Publicly-available information (including the last official ranking to pre-date Sarbanes-Oxley, for 2001 fee income, and some information available from the firms themselves related to headcount);
- Information that has entered the public domain despite the best efforts of the companies (specifically, information from former employees relating to headcount in specific offices, supplemented in some cases by directories of agency employees, as well as widely known revenue-per-employee targets); and
- The judgment of The Holmes Report, which covers the field in both the U.S. and Europe and can draw on information about clients moves, office openings and new hires to form a broad picture of the industry. Another obstacle involved data from firms in emerging markets, where definitions of public relations are sometimes imprecise and where firms were not always willing or able to secure verification from a trusted third party (equivalent to a certified public accountant in America). In several instances, The Holmes Report made its own efforts to verify the broad accuracy of information provided, and where it could do so with confidence, the firms involved are included in this report.

GLOBAL RANKINGS TOP 250

Revenue numbers for many agencies include subsidiaries—including research, advertising, and specialist PR firms—many of which operate under separate brands but nevertheless report into the listed PR agency.

RANK	RANK 2011	AGENCY NAME	HEADQUARTERS	FEE INCOME 2011	FEE INCOME 2010	GROWTH	STAFF
1	1	EDELMAN	USA	614,900,000	531,548,517	15.7%	4,076
2	2	WEBER SHANDWICK	USA	590,000,000	525,000,000	12.4%	
3	3	FLEISHMAN-HILLARD	USA	520,000,000	505,000,000	3.0%	
4	5	MSLGROUP1	FRANCE	474,000,000	418,000,000	13.4%	
5	4	BURSON-MARSTELLER	USA	450,000,000	435,000,000	3.4%	
6	6	HILL + KNOWLTON STRATEGIES	USA	390,000,000	375,000,000	4.0%	
7	7	KETCHUM	USA	385,000,000	355,000,000	8.5%	
8	8	OGILVY PUBLIC RELATIONS WORLDWIDE	USA	280,000,000	250,000,000	12.0%	
9	9	EURORSCG WORLDWIDE	FRANCE	208,000,000	205,000,000	1.5%	
10	10	FTI CONSULTING	USA/UK	200,900,000	193,100,000	4.0%	700
11	11	BRUNSWICK GROUP	UK	200,000,000	170,000,000	17.6%	
12	12	COHN & WOLFE	USA	160,000,000	150,000,000	6.7%	
13	14	GOLINHARRIS	USA	150,000,000	130,000,000	15.4%	
14	13	GRAYLING	UK	144,000,000	145,000,000	-0.7%	
15	16	MEDIA CONSULTA INTERNATIONAL	GERMANY	124,095,384	109,814,566	13.0%	452
16	17	APCO WORLDWIDE	USA	120,701,000	113,400,000	6.4%	600
17	18	WAGGENER EDSTROM WORLDWIDE	USA	115,832,000	111,910,000	3.5%	906
18	15	PORTER NOVELLI	USA	115,000,000	120,000,000	-4.2%	
19	19	RUDER FINN2	USA	81,281,000	97,059,000	-16.3%	644
20	69	HOPSCOTCH3	FRANCE	73,866,300	59,093,040	25.0%	
21	22	CHANDLER CHICCO COMPANIES	USA	72,800,000	64,000,000	13.8%	380
22	26	RLM FINSBURY4	UK	70,000,000	50,000,000	40.0%	
23	21	KREAB GAVIN ANDERSON	UK/SWEDEN	66,000,000	65,000,000	1.5%	350
24	29	BLUEFOCUS CONSULTING GROUP	CHINA	63,200,000	45,344,756	28.2%	500
25	24	FSB COMUNICAÇÕES	BRAZIL	62,161,382	55,562,156	11.9%	451
26		BELL POTTINGER GROUP5	UK	51,227,550		N/A	442
27	25	PRAP JAPAN	JAPAN	50,788,000	50,563,000	0.4%	250
28	28	TEXT 100	USA	50,425,771	46,151,130	9.3%	500
29	27	RES PUBLICA CONSULTING GROUP	CANADA	49,800,000	47,600,000	4.6%	330
30	35	W2O GROUP	USA	47,577,000	37,008,000	28.6%	239
31		PMK-BNC	USA	45,000,000		N/A	170
32		CDN COMUNICA AO CORPORATIVA	BRAZIL	42,000,000	37,000,000	13.5%	405
33		FREUD COMMUNICATIONS	UK	41,980,201		N/A	221
34	30	CITIGATE DEWE ROGERSON	UK	41,599,254	42,863,827	-3.0%	
35	36	FISCHERAPPELT	GERMANY	41,209,620	34,082,170	20.9%	265
36	33	HERING SCHUPPENER	GERMANY	40,172,900	36,285,200	10.7%	145
37	20	DENTSU PUBLIC RELATIONS6	JAPAN	40,000,000		N/A	213
38	32	COLLEGE GROUP	UK	38,808,750	39,646,860	-2.1%	
39	37	MWW GROUP	USA	38,626,000	34,798,000	11.0%	202
40	38	LEWIS PR	UK	34,948,056	31,222,416	11.9%	320
41	31	CNC	GERMANY	32,397,500		N/A	
42	48	MARINA MAHER COMMUNICATIONS	USA	31,500,000	25,000,000	26.0%	110
43	39	QORVIS	USA	29,500,000	29,713,320	-0.7%	
44	71	CITIZEN RELATIONS	USA	28,000,000		N/A	
45	43	MHP COMMUNICATIONS	UK	27,377,245	26,140,392	4.7%	149
46	49	DKC	USA	26,800,000	24,260,000	10.5%	150
47	41	BARABINO & PARTNERS	ITALY	26,000,000		N/A	
48	44	BITE COMMUNICATIONS	USA	25,614,894	25,083,939	2.1%	200
49	63	HOTWIRE	UK	24,659,306	19,978,745	23.4%	165
50	58	AGT COMMUNICATIONS GROUP	RUSSIA	23,786,744	18,893,855	25.9%	287

GLOBAL RANKINGS

TOP 250

Continued

RANK	RANK 2011	AGENCY NAME	HEADQUARTERS	FEE INCOME 2011	FEE INCOME 2010	GROWTH	STAFF
51		FINN PARTNERS	USA	23,618,000	0	N/A	196
52	51	LLORENTE & CUENCA	SPAIN	23,585,380	20,572,413	14.6%	300
53	62	PROFESSIONAL PUBLIC RELATIONS	AUSTRALIA	21,982,000	18,509,000	18.8%	148
54	54	FISHBURN HEDGES	UK	21,732,900	20,291,700	7.1%	
55	59	OLIVER SCHOTT KOMMUNIKATION	GERMANY	21,460,104	18,246,272	17.6%	133
56	50	PRIME INTERNATIONAL	SWEDEN	21,398,601	19,347,748	10.6%	116
57	75	FOUR COMMUNICATIONS GROUP	UK	21,156,396	15,834,554	33.6%	132
58	82	COONEY/WATERS GROUP	USA	20,433,000	14,088,673	45.0%	70
59	64	STRATEGIC PUBLIC RELATIONS GROUP	HONG KONG	20,200,000	17,800,000	13.5%	276
60	61	BLUE RUBICON	UK	20,180,550	18,574,710	8.6%	
61		M. COMMUNICATIONS	UK	20,000,000	16,000,000	25.0%	59
62	52	THE RED CONSULTANCY	UK	19,589,105	20,817,604	-5.9%	
63	77	ALLISON+PARTNERS	USA	19,400,000	15,500,000	25.2%	112
64	57	TAYLOR GLOBAL INC.	USA	19,100,000	19,300,000	-1.0%	90
65	55	CROS - PUBLIC RELATIONS AND PUBLIC AFFAIRS	RUSSIA	18,750,000	20,000,000	-6.2%	38
66	63	THE OUTCAST AGENCY	USA	18,500,000	17,965,864	3.0%	85
67	66	CONE	USA	18,500,000	17,500,000	5.7%	127
68	72	EXPOSURE	UK	18,463,355	16,466,954	12.1%	138
69		TONIC HEALTH	UK	18,230,798		N/A	
70	73	COYNE PR	USA	18,010,000	16,051,000	12.2%	107
71	68	PADILLA SPEER BEARDSLEY INC.	USA	17,834,808	17,074,827	4.5%	115
72	67	PRAIN GLOBAL	KOREA	17,794,220	17,262,328	3.1%	132
73	60	I&E	FRANCE	16,846,700	18,762,800	-10.2%	
74	65	INTEREL GROUP	BELGIUM	16,717,110	16,976,290	-1.5%	100.5
75		MIKHAILOV AND PARTNERS	RUSSIA	16,133,955	12,959,000	24.5%	160
76	70	A&B ONE	GERMANY	16,069,160	16,618,480	-3.3%	124
77	78	FARNER CONSULTING	SWITZERLAND	15,550,800	14,902,850	4.3%	60
78	80	INFORPRESS	SPAIN	15,137,138	14,403,891	5.1%	167.82
79	89	PEPPERCOM	USA	15,120,681	12,372,999	22.2%	71
80	98	ATOMIC PR	USA	15,008,254	11,112,250	35.1%	92
81	74	GIBBS & SOELL	USA	14,705,882	15,979,929	92.0%	82
82	94	CAPSTRAT	USA	14,200,000	11,800,000	20.3%	77
83	81	MAITLAND	UK	13,971,150	0	N/A	44
84	88	ZENO GROUP	USA	13,926,036	12,468,755	11.7%	77
85	92	M BOOTH	USA	13,892,873	12,088,002	14.9%	70
86	87	THE GEELMUYDEN.KIESE GROUP	NORWAY	13,866,130	12,311,050	12.6%	68
87	83	ADFACTORS PR	INDIA	13,390,000	13,830,000	-3.2%	330
88	84	FRENCH/WEST/VAUGHAN	USA	13,325,710	13,579,663	-1.9%	72
89	96	ROWLAND	AUSTRALIA	13,081,112	11,600,000	12.8%	92
90	85	LANSON'S COMMUNICATIONS	UK	13,004,617	13,580,957	-4.2%	74
91	105	PORTLAND	UK	12,844,144		N/A	
92		PCG CABELL	USA	12,832,520		N/A	92
93	109	SHIFT COMMUNICATIONS	USA	12,673,822	9,947,996	27.4%	95
94	97	5W PUBLIC RELATIONS	USA	12,656,123	11,393,178	11.1%	69
95	107	CJP COMMUNICATIONS	USA	12,611,017	10,077,944	25.1%	57
96		WE ARE SOCIAL	UK	12,576,865	5,044,083	149.3%	130
97	118	ERGO UNTERNEHMENSKOMMUNIKATION	GERMANY	12,570,230	8,812,120	42.6%	99
98	100	MAKOVSKY + COMPANY	USA	12,500,000	11,300,000	10.6%	55
99	120	LEVICK STRATEGIC COMMUNICATIONS	USA	12,459,523	9,023,546	38.1%	55
100	90	RF BINDER	USA	12,450,000	12,310,000	1.1%	75

GLOBAL RANKINGS

TOP 250

Continued

RANK	RANK 2011	AGENCY NAME	HEADQUARTERS	FEE INCOME 2011	FEE INCOME 2010	GROWTH	STAFF
101	95	FRANK	UK	12,244,325	11,579,106	5.7%	74
102	106	FAKTOR 3	GERMANY	12,051,870	10,185,520	18.3%	77
103	93	HUNTER PUBLIC RELATIONS	USA	12,031,691	12,005,679	0.2%	72
104		LIPPE TAYLOR	USA	11,795,000	9,840,000	19.9%	64
105	91	JESCHENKO	GERMANY	11,766,772	12,262,830	-4.0%	159
106	99	CRT/TANAKA	USA	11,572,544	11,082,286	4.4%	71
107		FORMULA PR	USA	11,565,878		N/A	102
108	119	HABERLEIN & MAUERER	GERMANY	11,533,510	8,812,120	30.9%	139
109		MITCHELL COMMUNICATIONS GROUP	USA	11,369,820		N/A	68
110	130	OLSON PR	USA	11,300,000	8,300,000	36.1%	60
111	111	WELLCOM	FRANCE	11,229,278	9,360,214	20.0%	78
112	132	IMPE	USA	11,100,000	7,698,000	44.2%	87
113	86	AMI COMMUNICATIONS	CZECH REPUBLIC	11,041,068	10,380,159	6.4%	119
114	102	SLOANE & COMPANY	USA	10,800,000	10,700,000	0.9%	22
115	108	BRANDS2LIFE	UK	10,708,110	9,913,307	8.0%	80
116	104	LEXIS	UK	10,706,558	10,458,000	2.4%	75
117		APPROACH	USA	10,700,000	7,800,000	37.2%	130
118	103	WIDMEYER COMMUNICATIONS	BRAZIL	10,600,000	10,587,902	0.1%	
119	114	FAHLGREN MORTINE	USA	10,532,642	9,467,627	11.2%	65
120	121	SPARKPR	USA	10,531,890	8,861,672	18.8%	34
121	124	JACKSON SPALDING	USA	10,465,757	8,972,352	16.6%	70
122	126	TRANS ARABIAN CREATIVE COMMUNICATIONS (TRACCS)	SAUDI ARABIA	10,180,000	8,243,505	23.5%	231
123	101	ACHTUNG	GERMANY	10,082,102	10,735,002	-6.1%	81
124	115	KAPLOW	USA	10,024,000	9,391,061	6.7%	58
125	112	DAVIES	USA	9,963,041	9,672,856	3.0%	28
126	113	RASKY BAERLEIN STRATEGIC COMMUNICATIONS	USA	9,862,287	9,567,609	3.1%	33
127	123	NELSON BOSTOCK GROUP	UK	9,752,642	8,692,862	12.2%	73
128	110	BIG PARTNERSHIP	UK	9,571,790	9,727,025	-1.6%	
129	127	THE HOFFMAN AGENCY	USA	9,150,000	8,200,000	11.6%	101
130	134	RED DOOR	UK	8,618,647	7,579,730	13.7%	42
131	140	VIRGO HEALTH	UK	8,573,629	7,362,765	16.4%	57
132		CAKE	UK	8,537,925		N/A	50
133	125	TVC GROUP	UK	8,382,690	8,430,813	-0.6%	
134	128	3 MONKEYS COMMUNICATIONS	UK	8,319,416	8,052,409	3.3%	56
135	150	FIRST HOUSE AS	NORWAY	8,293,760	5,831,550	42.2%	18.5
136	142	AIRFOIL PUBLIC RELATIONS	USA	8,127,627	6,810,916	19.3%	54
137	129	DCORPORATECOM	SPAIN	8,000,000	8,000,000	0.0%	
138	138	HORN GROUP	USA	7,900,000	7,500,000	5.3%	46
139	137	KIRCHHOFF CONSULT	GERMANY	7,823,089	7,188,876	8.8%	46
140		TBWA/CORPORATE	FRANCE	7,775,400		N/A	
141	143	JEFFREYGROUP	USA	7,600,000	6,790,000	11.9%	86
142	145	KPR & ASSOCIATES	KOREA	7,544,561	6,324,735	19.3%	100
143	141	SENATESHJ GROUP	AUSTRALIA/NEW ZEALAND	7,536,325	7,178,469	5.0%	34
144	152	OCTOPUS GROUP	UK	7,504,060	5,956,367	26.0%	59
145		ENGLANDER KNABE + ALLEN	USA	7,500,000	6,800,000	10.3%	19
146	160	LAUNCHSQUAD	USA	7,412,827	5,803,313	27.7%	64
147	133	KOMM.PASSION	GERMANY	7,386,630	6,997,860	5.6%	60
148	122	STANTON COMMUNICATIONS	UK	7,214,570	8,848,000	-18.5%	41
149	158	AGENCE ELAN	FRANCE	7,127,450	5,837,911	22.1%	
150		BEX*COMMUNICATIE	NETHERLANDS	7,127,450		N/A	

GLOBAL RANKINGS

TOP 250

Continued

RANK	RANK 2011	AGENCY NAME	HEADQUARTERS	FEE INCOME 2011	FEE INCOME 2010	GROWTH	STAFF
151	135	CP/COMPARTNER	GERMANY	6,997,860	7,257,040	-3.6%	82
152	159	DIPLOMAT COMMUNICATIONS	SWEDEN	6,994,051	5,641,854	24.0%	40
153		MURPHY O'BRIEN	USA	6,848,421	6,192,324	10.6%	44
154	139	GRUPO LIFT	PORTUGAL	6,767,225	7,164,681	-5.5%	46
155	147	BECKERMANN	USA	6,750,000	6,131,666	10.1%	
156	151	HANOVER COMMUNICATIONS	UK	6,738,751	5,973,443	12.8%	44
157	156	EMG	NETHERLANDS	6,738,680	5,701,960	18.2%	50
158	174	PRO-VISION GROUP	RUSSIA	6,690,821	5,051,574	32.5%	65
159	153	EULOGY!	UK	6,674,054	5,922,468	12.7%	41
160	136	FINK & FUCHS PUBLIC RELATIONS	GERMANY	6,479,500	7,257,040	-10.7%	57
161	176	THE WHITEOAKS CONSULTANCY	UK	6,297,078	4,946,302	27.3%	40
162		IMAGEM CORPORATIVA	BRAZIL	6,205,683	4,140,888	49.9%	78
163	148	PAN COMMUNICATIONS	USA	6,113,000	6,116,000	0.0%	44
164	149	JASCULCA TERMAN & ASSOCIATES	USA	6,107,628	6,066,569	0.7%	51
165	144	CONSOLIDATED PR	UK	6,099,183	6,335,140	-3.7%	
166	155	MCNEELY PIGOTT & FOX PUBLIC RELATIONS	USA	5,989,743	5,906,421	1.4%	48
167	173	BLISSPR	USA	5,965,000	5,134,000	16.2%	39
168	154	LOU HAMMOND & ASSOCIATES	USA	5,952,850	5,944,317	0.1%	40
169	172	CATALYST PUBLIC RELATIONS	USA	5,923,944	5,134,552	15.4%	26
170	164	SHINE COMMUNICATIONS	UK	5,898,930	5,433,225	8.6%	53
171		AD HOC COMMUNICATION ADVISORS	ITALY	5,831,550	5,183,600	12.5%	22
172	167	SPECTRUM SCIENCE COMMUNICATIONS	USA	5,800,000	5,300,000	9.4%	23
173	181	MATTER COMMUNICATIONS	USA	5,750,000	4,800,000	19.8%	54
174	131	FRESHWATER	UK	5,701,782	7,676,371	-25.7%	
175	194	PEGASUS PR	UK	5,451,853	4,271,227	27.6%	44
176	183	PUBLICASITY	UK	5,433,225	5,122,755	6.1%	
177	189	RBB PUBLIC RELATIONS	USA	5,407,254	4,441,206	21.8%	35
178	157	MCG MEDICAL CONSULTING GROUP	GERMANY	5,313,190	5,650,124	-6.0%	36
179	163	ECCO DEUTSCHLAND	GERMANY	5,274,313	5,521,624	-4.5%	
180	169	WBPR	GERMANY	5,261,354	5,054,010	4.1%	47
181	177	QUINN & CO.	USA	5,186,306	4,874,043	6.4%	34
182	198	GIBRALTAR ASSOCIATES	USA	4,918,650	3,981,155	23.5%	19
183	199	INTERMARKET COMMUNICATIONS	USA	4,837,425	3,929,978	23.1%	20
184	171	AKKANTO	BELGIUM	4,792,759	5,026,118	-4.6%	16
185		TALK PR	UK	4,792,104	4,046,976	18.4%	40
186	185	PUBLIC COMMUNICATIONS INC.	USA	4,780,000	4,600,000	3.9%	47
187	216	KWITTKEN & COMPANY	USA	4,750,000	3,300,000	43.9%	
188	193	HVG CONSULT GMBH (HAAS & HEALTH PARTNER)	GERMANY	4,746,882	4,197,420	13.1%	33
189	233	JONES PUBLIC AFFAIRS	USA	4,746,484	2,287,595	107.5%	25
190	178	SPEED COMMUNICATIONS	UK	4,716,418	4,824,898	-2.2%	34
191	168	JUST:HEALTH	UK	4,677,231	5,211,239	-10.2%	
192		CLARION COMMUNICATIONS	UK	4,657,050		N/A	27
193	205	REVIVEHEALTH	USA	4,650,000	3,700,000	25.7%	19
194	175	JOHANSSON & KRETSCHMER	GERMANY	4,626,363	4,846,666	-4.5%	35
195	196	LINHART PR	USA	4,599,067	4,147,567	10.9%	29
196	192	SINGER ASSOCIATES, INC.	USA	4,537,952	4,358,176	4.1%	12
197	182	CERRELL ASSOCIATES	USA	4,467,127	4,789,582	-6.7%	22
198	187	KALTWASSER KOMMUNIKATION	GERMANY	4,431,978	4,393,101	0.9%	30
199	190	L C WILLIAMS & ASSOCIATES	USA	4,387,355	4,385,887	0.0%	24
200	184	SALT	UK	4,301,562		N/A	29

GLOBAL RANKINGS

TOP 250

Continued

RANK	RANK 2011	AGENCY NAME	HEADQUARTERS	FEE INCOME 2011	FEE INCOME 2010	GROWTH	STAFF
201		IKP PR & LOBBYING	GERMANY	4,202,319	4,478,630	-6.2%	32
202	212	360 PUBLIC RELATIONS	USA	4,200,000	3,450,000	21.7%	
203		BRANDZEICHEN	GERMANY	4,199,005	3,932,556	6.8%	32
204	202	LANE PR	USA	4,144,944	3,867,096	7.2%	25.5
205	218	PRETTY GREEN	UK	4,115,280		N/A	38
206	200	COOPERKATZ & COMPANY	USA	4,060,058	3,909,356	3.9%	28
207	208	CIRKLE	UK	4,037,363	3,546,232	13.8%	27
208	191	LONDON COMMUNICATIONS AGENCY	UK	4,022,139	4,357,446	-6.7%	
209	235	MARCO DE COMUNICACIÓN	SPAIN	3,950,681	3,031,827	30.3%	47
210	213	INTEGRAL PR SERVICES	INDIA	3,910,000	3,380,000	15.7%	85
211	201	MCS HEALTHCARE PUBLIC RELATIONS	USA	3,771,495	3,874,213	-2.7%	20
212	234	OPEN ROAD	UK	3,725,640		N/A	
213	206	HBI HELGA BAILEY	GERMANY	3,693,315		N/A	
214	215	STANDING PARTNERSHIP	USA	3,568,886	3,325,996	7.3%	24
215	162	FOOD MINDS	USA	3,515,753		N/A	8
216	186	MOLTHAN VAN LOON	GERMANY	3,511,889		N/A	
217		ASESORES DE RELACIONES PUBLICAS Y COMUNICACION	SPAIN	3,439,558	3,122,202	10.2%	41
218	223	SCHNEIDER ASSOCIATES	USA	3,394,599	2,906,808	16.8%	22
219	227	DUKAS PUBLIC RELATIONS	USA	3,389,000	2,764,000	22.6%	16
220		FORTUNE PR	INDONESIA	3,365,011	812,850	314.0%	75
221		CAMBRE ASSOCIATES	BELGIUM	3,349,902	2,809,511	19.2%	21
222	224	KAIZO	UK	3,311,163	2,861,830	15.7%	16
223	209	GROUNDLOOR MEDIA	USA	3,305,110	3,551,143	-6.9%	13
224		HMC SESWA CORPORATE COMMUNICATIONS	SOUTH AFRICA	3,261,657	3,170,521	2.9%	7
225		CRUX KOMMUNIKASJON	NORWAY	3,239,750		N/A	
226		PROFILE	POLAND	3,239,750		N/A	
227		EML WILDFIRE	UK	3,182,318	3,027,083	5.1%	28
228	229	PR-COM	GERMANY	3,123,119	2,565,882	21.7%	28
229	230	SCHWARTZ PUBLIC RELATIONS	GERMANY	3,110,160	2,565,882	21.2%	15
230		COSMO PUBLIC RELATIONS	JAPAN	3,100,000	3,300,000	-6.1%	40
231		INC	ITALY	3,046,661	3,032,406	0.5%	24
232	228	STORYMAKER	GERMANY	3,019,447		N/A	
233		CC GROUP	UK	3,016,216		N/A	18
234	237	MADISON PUBLIC RELATIONS	INDIA	3,000,000	2,500,000	20.0%	55
235		BORDERS + GRATEHOUSE	USA	2,982,627	1,790,365	66.6%	13
236	241	O'MALLEY HANSEN COMMUNICATIONS	USA	2,951,200	2,415,000	22.2%	18
237	222	THE SKILLS GROUP	AUSTRIA	2,915,775	2,889,857	0.9%	
238	232	JOHNSON KING	UK	2,910,959	2,542,367	14.5%	24
239	207	LABRECHE	USA	2,900,000	2,900,000	0.0%	20
240	225	FOCUS PR	UK	2,868,122	2,829,613	1.4%	28
241	221	TANGERINE PR	UK	2,806,649	2,483,760	13.0%	
242		M3 COMMUNICATIONS GROUP	HUNGARY	2,750,000	2,450,000	11.8%	85
243	248	THREEPIPE COMMUNICATIONS	UK	2,677,804	2,300,583	16.4%	25
244	231	WHYTE CORPORATE AFFAIRS	BELGIUM	2,656,595	2,300,223	15.5%	18
245	214	CITYSAVVY	UK/NETHERLANDS	2,638,995	3,104,700	85.0%	
246	249	EWING GROUP	CZECH REPUBLIC	2,591,800	2,410,374	7.5%	24
247	246	CHAMELEON PR	UK	2,540,292	2,119,073	19.9%	19.5
248		BOTTLE PR	UK	2,539,645	2,493,074	1.9%	24
249	226	THE GROSSMAN GROUP	USA	2,448,300	2,579,800	94.9%	10
250		ALL CHANNELS COMMUNICATION GROUP	BULGARIA	2,260,835	0	N/A	30

GLOBAL RANKINGS

TOP 250

Continued

TOP 10: EDELMAN WIDENS GAP AT TOP OF THE TABLE

- Edelman grows 8.2 percent to \$666m
- Double-digit growth at Ketchum and MSLGroup
- Independents continue to outperform holding groups

2012	2011	AGENCY	HQ	2012 [\$]	GROWTH [%]
1	1	EDELMAN	USA	665,600,000	8.2
2	2	WEBER SHANDWICK	USA	628,350,000	6.5
3	3	FLEISHMANHILLARD	USA	546,000,000	5.0
4	4	MSLGROUP	FRANCE	526,000,000	11.0
5	5	BURSON MARSTELLER	USA	454,500,000	1.0
6	7	KETCHUM	USA	440,000,000	14.0
7	6	HILL+KNOWLTON STRATEGIES	USA	390,000,000	0.0
8	8	OGILVY PUBLIC RELATIONS	USA	297,000,000	6.1
9	9	HAVAS PR	FRANCE	224,000,000	7.7
10	11	BRUNSWICK	UK	210,000,000	5.0

Edelman has widened its lead as the largest PR firm in the world, a position the independent PR firm has now held for the past three years. The agency reported growth of 8.2 percent in 2012 to \$666m, while the Holmes Report estimates that its closest rival Weber Shandwick increased fee income by around 6.5 percent.

Like many of the top 10 firms, Edelman's growth slowed in 2012. Only two top ten agencies—Ketchum and MSLGroup—recorded double digit growth. Ketchum's increase was enough for the Omnicom-owned agency to pass Hill+Knowlton Strategies and reach the number six spot on our list.

The only other change in the top 10, meanwhile, saw FTI Consulting drop out at the expense of keen rival Brunswick.

Fee income for nine of the top 10 firms is estimated by The Holmes Report based on published sources (including holding company revenues) and our own knowledge of the industry, with the majority of large holding companies continuing to use the Sarbanes-Oxley financial disclosure rules as an excuse not to publish numbers of individual businesses.

Independent firms, meanwhile, continue to outperform the holding companies in terms of growth, with Edelman only the most prominent example. Overall, independent firms submitting information to the Holmes Report 250 experienced growth of better than eight percent, compared to average growth of around three percent for the public relations operations of major holding companies.

Outside the top 10, impressive growth at GolinHarris saw it climb one spot to 12th. Among independents, China's Blue Focus was the biggest gainer—its 39 percent growth to \$87.8 million was enough to lift it from 24th to 19th. Brazil's FSB also impressed, growing 14 percent to more than \$71m. US-based W2O, meanwhile, entered the top 25 for the first time after better than 30 percent growth.

The Global Rankings mark the first phase of the World PR Report, conducted in conjunction with ICCO, which will also include the results of a definitive survey of attitudes and trends among PR agencies worldwide.

GLOBAL RANKINGS

TOP 250

Continued

FAST MOVERS: ASIA-PACIFIC PR FIRMS LEAD INDUSTRY GROWTH

AGENCY [GLOBAL]	HQ	GROWTH [%]	FEE INCOME 2012
NEWGATE COMMUNICATIONS	UK	333.5	5,463,024
FORTUNE PR	INDONESIA	198.8	10,055,460
IRIS WORLDWIDE	UK	153.2	10,858,856
MARCO DE COMUNICACION	SPAIN	75.0	6,922,125
ZENO GROUP	USA	73.8	24,412,282
WE ARE SOCIAL	UK	72.7	22,750,085
KWITTEN + COMPANY WORLDWIDE	USA	70.0	8,500,000
W COMMUNICATIONS	UK	59.0	2,895,728
TANGERINE PR	UK	46.1	4,294,002
MITCHELL COMMUNICATIONS GROUP, LLC	USA	41.1	14,335,377

The Asia-Pacific region and other emerging public relations markets led the way when it came to growth in 2012, but that doesn't mean that firms in other parts of the world—including the most sluggish economies in Europe—were incapable of impressive performance despite the prevailing economic headwinds.

Our list of the top 10 firms includes Fortune PR from Indonesia—surely one of the international PR markets that is primed for growth over the next few years—alongside Marco de Comunicacion of Spain, a market that is clearly struggling. But the global top 10 list is dominated by firms from the most mature PR markets in the world, with five from the UK (even if the fastest growing is essentially a start-up) and three from the US. It is notable, however, that many of the firms on the US and UK lists are those that have made a significant investment in digital and social media.

Just as interesting, there are plenty of larger agencies on our top 10 lists from each region: the UK top 10 includes College Hill, a firm with more than \$47 million in fees; our US list includes W2O, with \$62 million in fees, and three firms with more than \$14 million (Mitchell, French/West/Vaughan and Finn Partners); while the number three firm on the Asia-Pacific list is Blue Focus, now closing in on \$90 million.

“What these numbers show is that well-managed public relations firms can grow in almost any environment or market condition,” says Paul Holmes, editor of The Holmes Report. “Even in difficult market conditions, there are many firms reporting 20 percent growth or better. Firms in mature market are still capable of robust double-digit growth, as are mature firms with tens of millions of dollars in fee income.”

Overall, firms headquartered in the Asia-Pacific region grew by an average of 13.6 percent, slightly faster than firms from the US (11.8 percent) and other emerging markets—a list that includes Latin American, Middle Eastern and African firms—where the growth was 10.4 percent.

Firms from the UK grew an average of 9.8 percent; firms from Western Europe were up 8.2 percent; and firms from Eastern Europe saw their fees increase by just 3.2 percent.

GLOBAL RANKINGS TOP 250

Continued

“What these numbers show is that well-managed public relations firms can grow in almost any environment or market condition...”

AGENCY [US]	GROWTH [%]	FEE INCOME 2012
KWITTKEN & CO.	70.0	8,500,000
MITCHELL COMMUNICATIONS	41.0	14,335,377
FOOD MINDS	38.0	4,859,213
BORDERS + GRATEHOUSE	37.0	4,093,335
PUBLIC COMMUNICATIONS, INC.	37.0	6,546,731
FINN PARTNERS	36.0	32,393,000
W2O GROUP	30.0	62,005,000
FRENCH/WEST/AUGHAN	29.0	17,186,330
ALLISON & PARTNERS	29.0	25,000,000
LAUNCHSQUAD	26.0	9,387,224

AGENCY [UK]	GROWTH [%]	FEE INCOME 2012
NEWGATE COMMUNICATIONS	335.0	5,463,024
IRIS WORLDWIDE	153.0	10,858,856
W COMMUNICATIONS	59.0	2,895,728
BABEL PUBLIC RELATIONS	56.0	1,813,992
TANGERINE PR	46.1	4,294,002
PEGASUS	33.0	7,596,205
RED LORRY YELLOW LORRY	33.0	2,375,440
BERKELEY PR	26.0	3,633,887
COLLEGE HILL	22.0	47,263,287
POWERSCOURT	21.0	9,607,443

AGENCY [EUROPE]	HQ	GROWTH [%]	FEE INCOME 2012
MARCO DE COMUNICACION	SPAIN	75.0	6,922,125
PRAM CONSULTING	CZECH REP.	50.0	1,813,992
ACHTUNG!	GERMANY	39.0	14,305,725
24/7 PR	POLAND	33.0	1,606,745
DIPLOMAT COMMUNICATIONS	SWEDEN	32.0	9,229,500
FIRST HOUSE	NORWAY	30.0	11,284,427
ACTION GLOBAL COMMUNICATIONS	CYPRUS	29.0	18,000,000
WHYTE CORPORATE AFFAIRS	BELGIUM	27.0	3,446,559
PR PARTNER	RUSSIA	27.0	1,900,000
GEELMUYDEN KIESE	NORWAY	26.0	20,161,160

AGENCY [ASIA-PACIFIC]	HQ	GROWTH [%]	FEE INCOME 2012
FORTUNE PR	INDONESIA	199.0	10,055,460
SPARK COMMUNICATIONS	THAILAND	50.0	1,500,000
BLUE FOCUS	CHINA	39.0	87,771,000
ROWLAND	AUSTRALIA	37.0	17,943,977
PR ONE	KOREA	28.0	14,746,544
REPUTATION PTY	AUSTRALIA	25.0	1,500,000
EON STAKEHOLDER RELATIONS	PHILIPPINES	24.0	2,740,000
N2N COMMUNICATIONS	AUSTRALIA	21.0	5,100,000
CREATIVE CREST	INDIA	20.0	4,200,000
INTEGRAL PR	INDIA	18.0	4,600,000

GLOBAL RANKINGS TOP 250

Continued

HOLDING GROUPS/ NETWORKS

GROUP	GROWTH [%]	PR REVENUE 2012
WPP	4.2	1,491,000,000
OMNICOM GROUP	4.9	1,290,000,000
INTERPUBLIC GROUP ¹	8.0	1,206,000,000
PUBLICIS GROUPE	11.0	526,000,000
PROI ³		421,000,000
WORLDCOM ³		343,000,000
HUNTSWORTH GROUP	-0.3	281,000,000
HAVAS PR	7.7	224,000,000
NEXT 15 ²		149,000,000
PRGN ³		110,000,000

1: Interpublic Group's PR fee income is estimated based on revenues provided by its CMG division.

2: Next 15 reports to a different schedule to all of the other groups on this table. This figure represents a calculation of its fee income for calendar year 2012.

3: PROI, Worldcom and PRGN are networks of independently-owned PR firms.

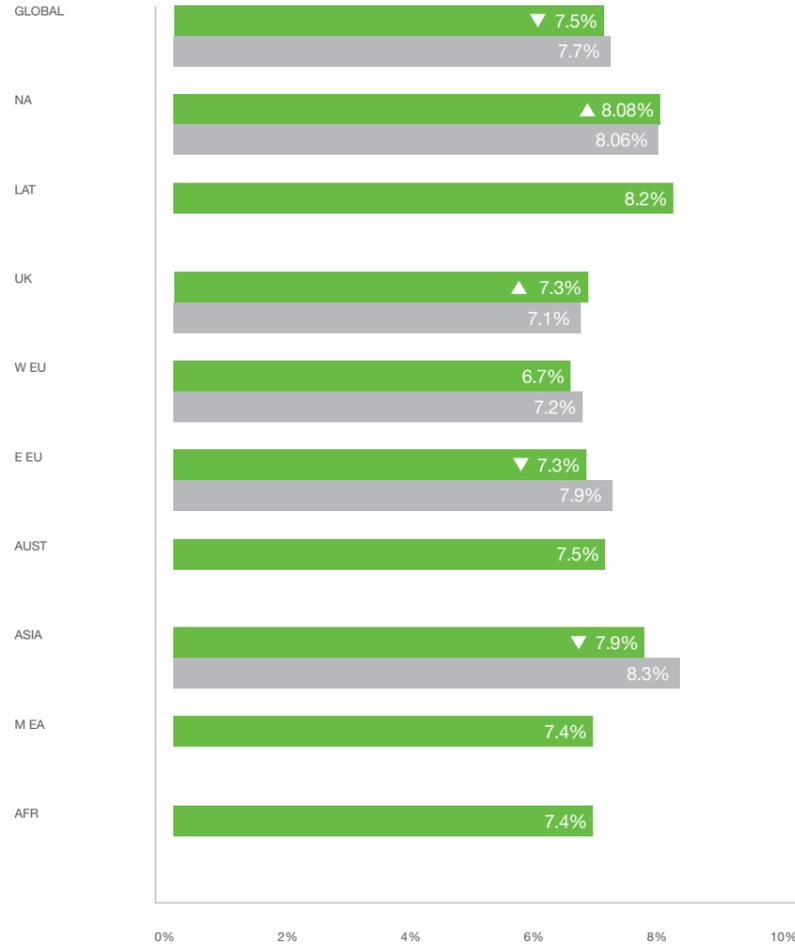
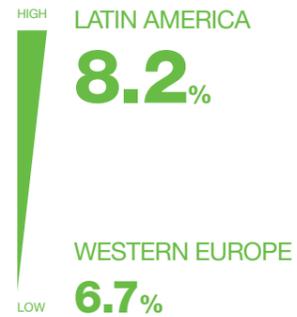
GLOBAL OVERVIEW

TRENDS & ATTITUDES

OPTIMISIM:

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

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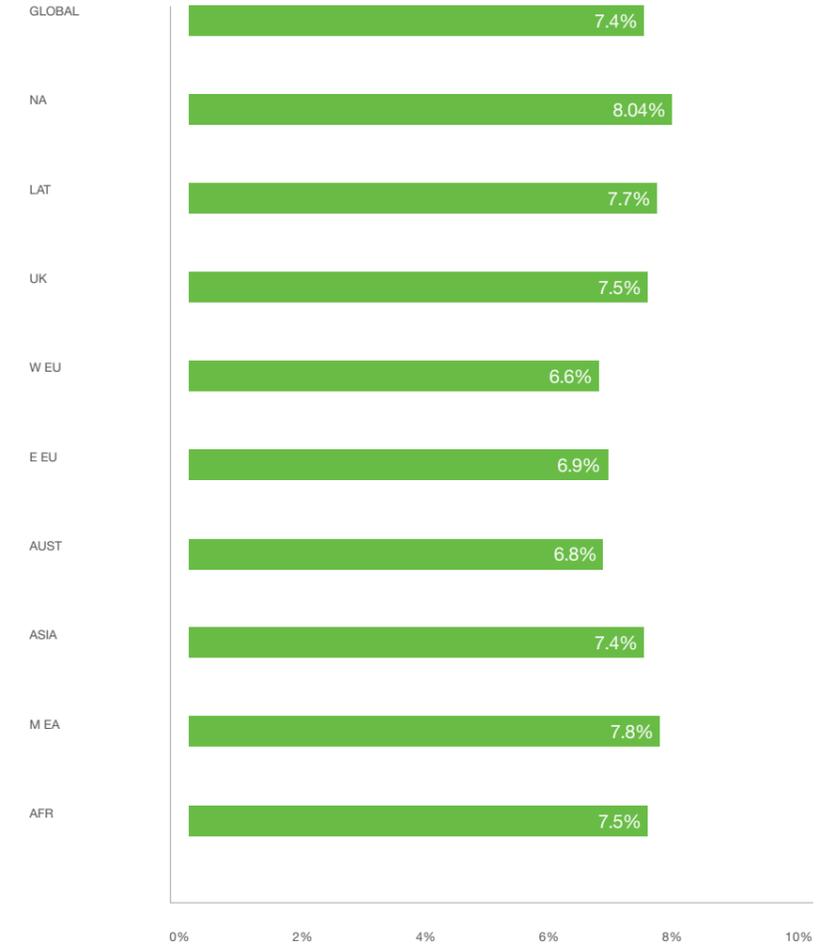
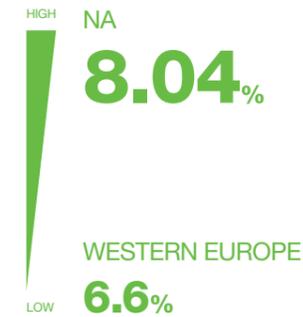
GLOBAL OVERVIEW

TRENDS & ATTITUDES

Continued

PROFITABILITY:

I expect an increase in agency profitability this year



2013
2012

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LAT: LATIN AMERICA
UK: UNITED KINGDOM
W EU: WESTERN EUROPE
E EU: EASTERN EUROPE
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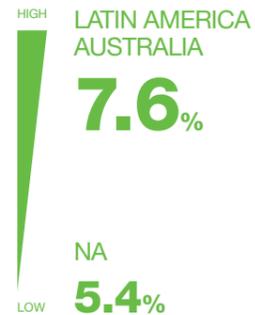
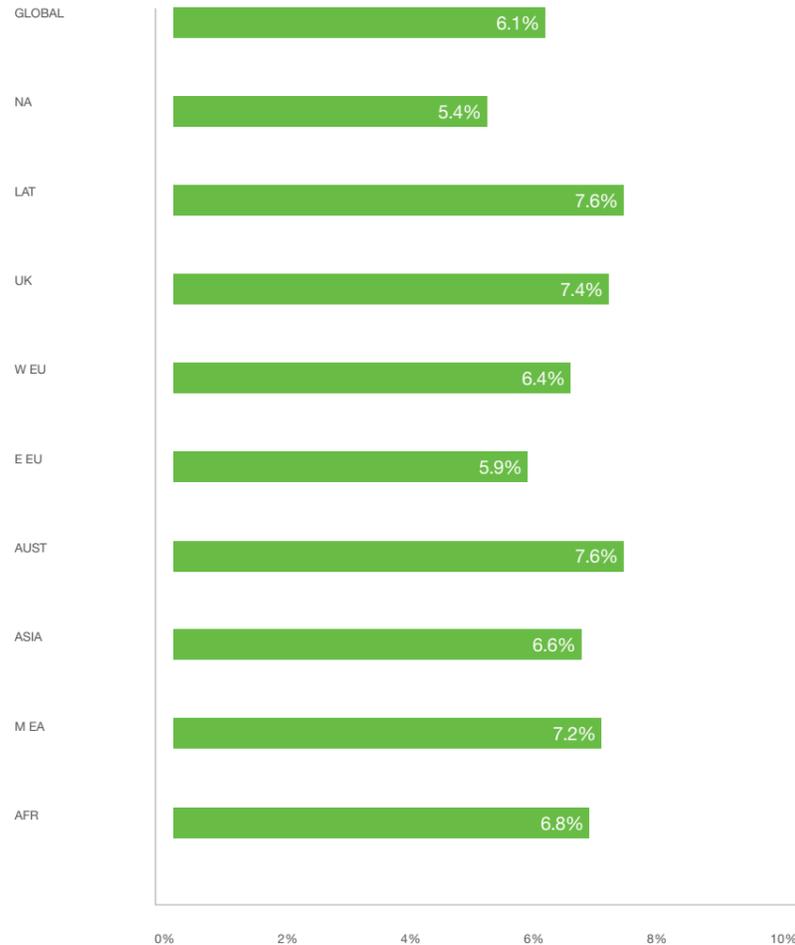
GLOBAL OVERVIEW

TRENDS & ATTITUDES

Continued

INTERNATIONAL BUSINESS:

The proportion of our income derived from international business is increasing



2013
2012

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LAT: LATIN AMERICA
UK: UNITED KINGDOM
W EU: WESTERN EUROPE
E EU: EASTERN EUROPE
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ASIA: ASIA-PACIFIC
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GLOBAL OVERVIEW

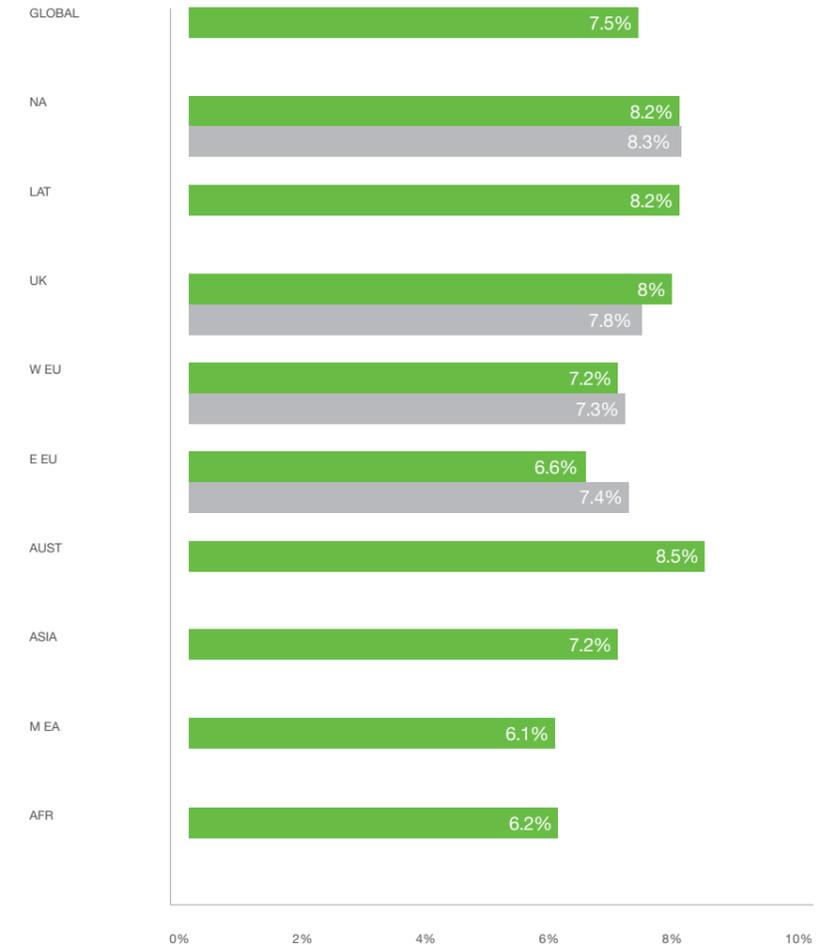
TRENDS & ATTITUDES

Continued

CORPORATE REPUTATION:

Corporate CEOs in this market take corporate reputation seriously

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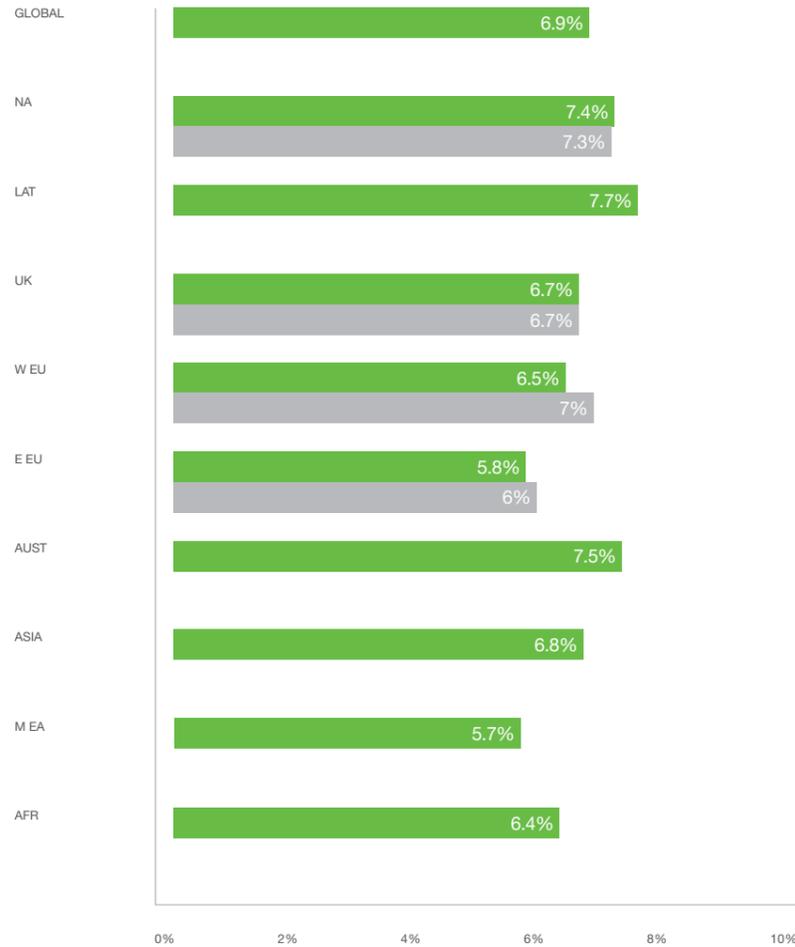
GLOBAL OVERVIEW

TRENDS & ATTITUDES

Continued

SOCIAL RESPONSIBILITY:

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



2013
2012

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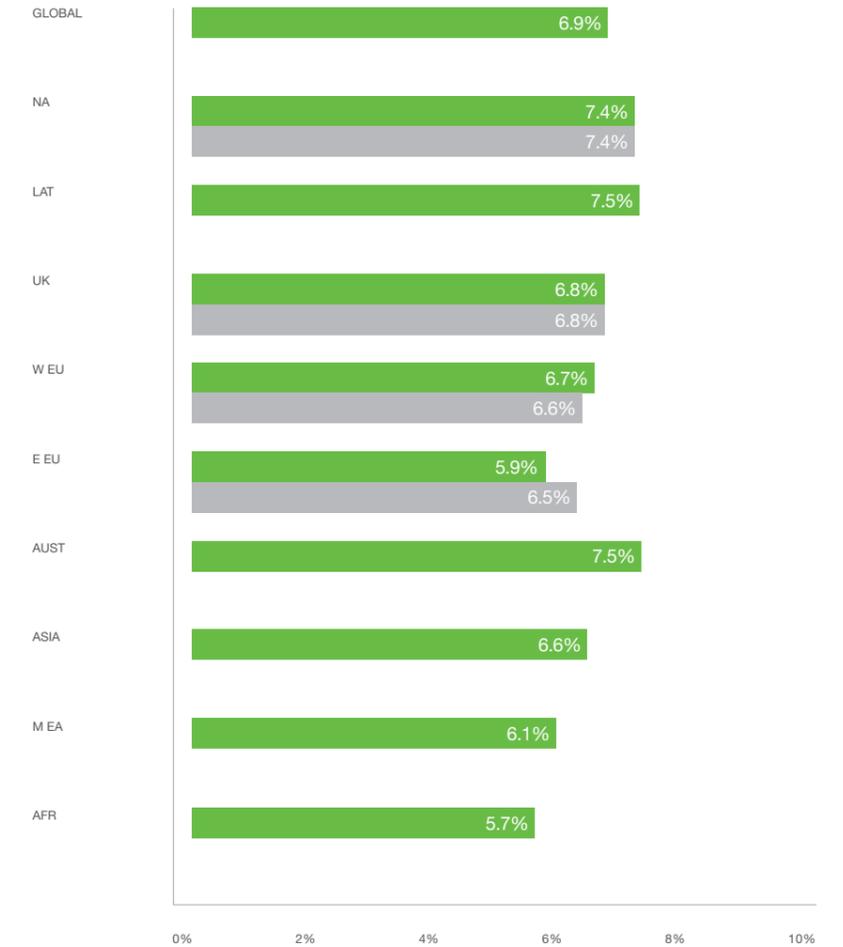
GLOBAL OVERVIEW

TRENDS & ATTITUDES

Continued

SHAREHOLDER INTERESTS:

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



2013
2012

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LAT: LATIN AMERICA
UK: UNITED KINGDOM
W EU: WESTERN EUROPE
E EU: EASTERN EUROPE
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GLOBAL OVERVIEW

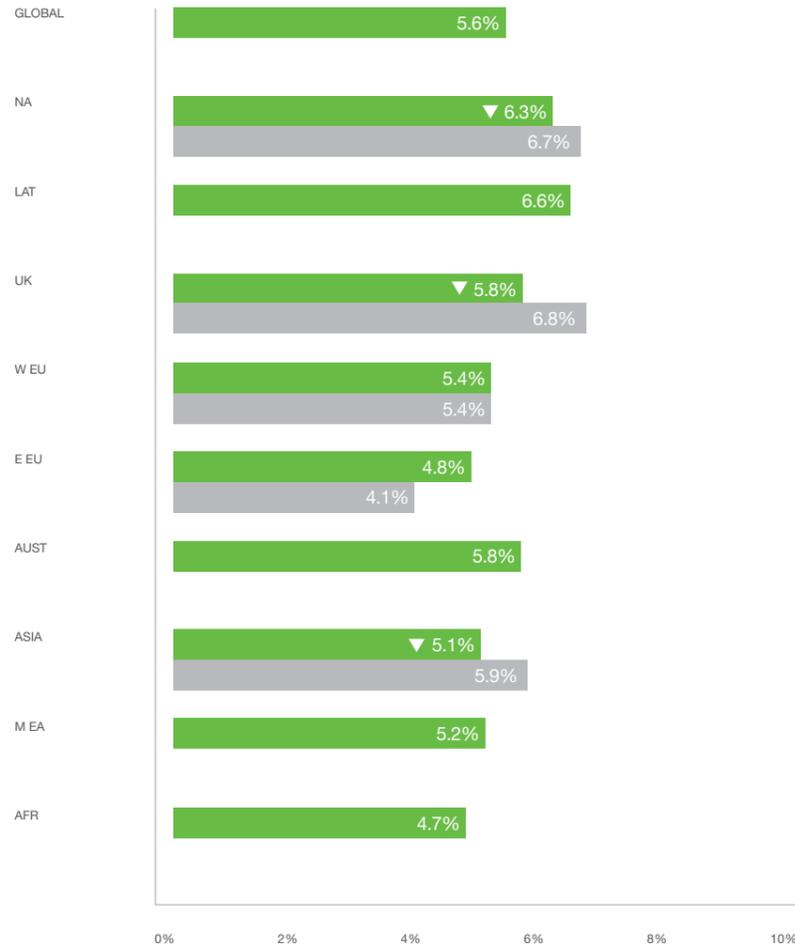
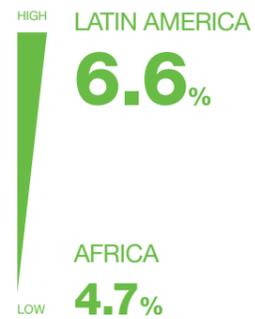
TRENDS & ATTITUDES

Continued

MARKETING SPEND:

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

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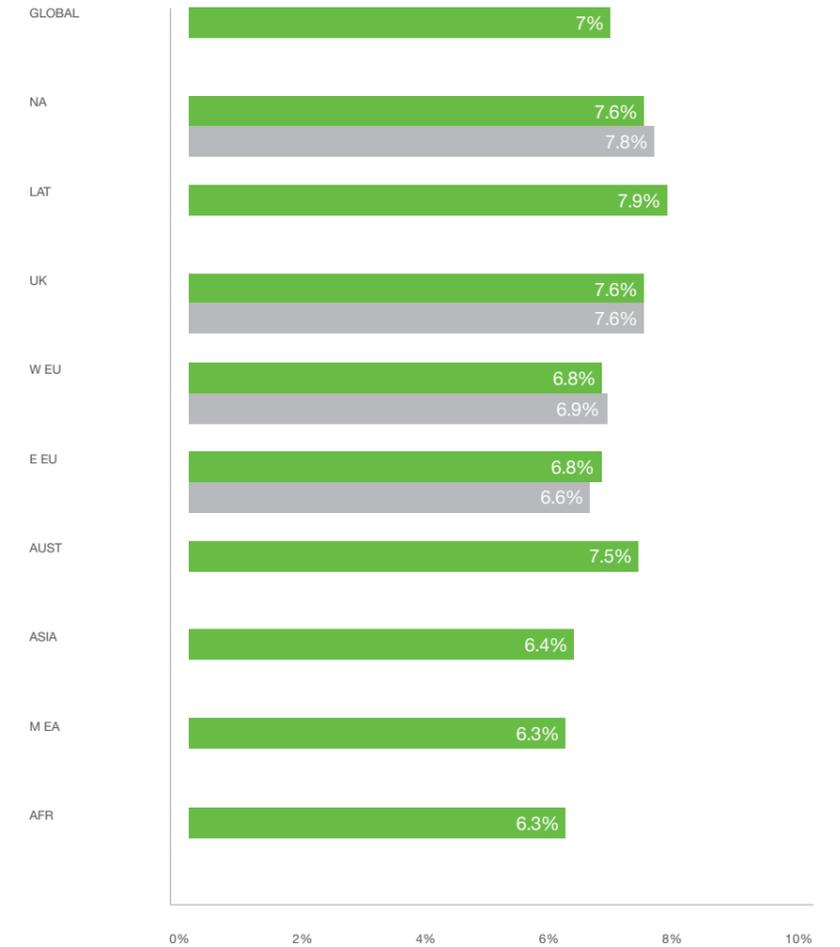
GLOBAL OVERVIEW

TRENDS & ATTITUDES

Continued

NON-TRADITIONAL SERVICES:

Clients in this market are willing to turn to public relations firms to provide non-traditional services



2013
2012

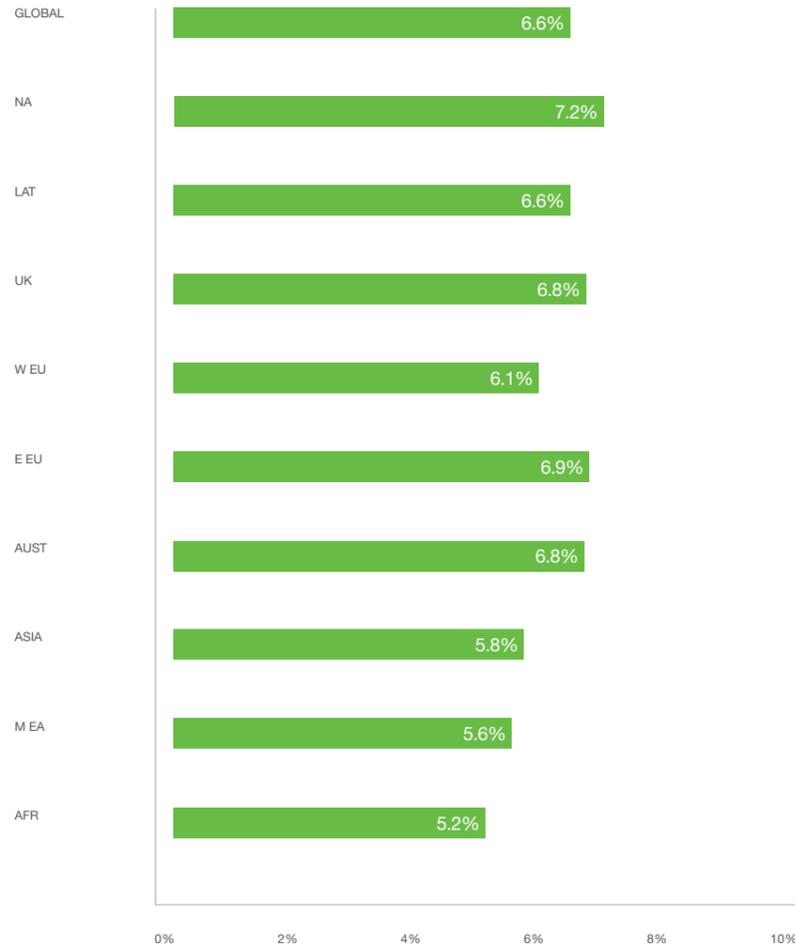
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AFR: AFRICA

GLOBAL OVERVIEW

TRENDS & ATTITUDES

DIGITAL:

PR agencies in this market are successfully addressing client digital needs



2013
2012

NA: NORTH AMERICA
LAT: LATIN AMERICA
UK: UNITED KINGDOM
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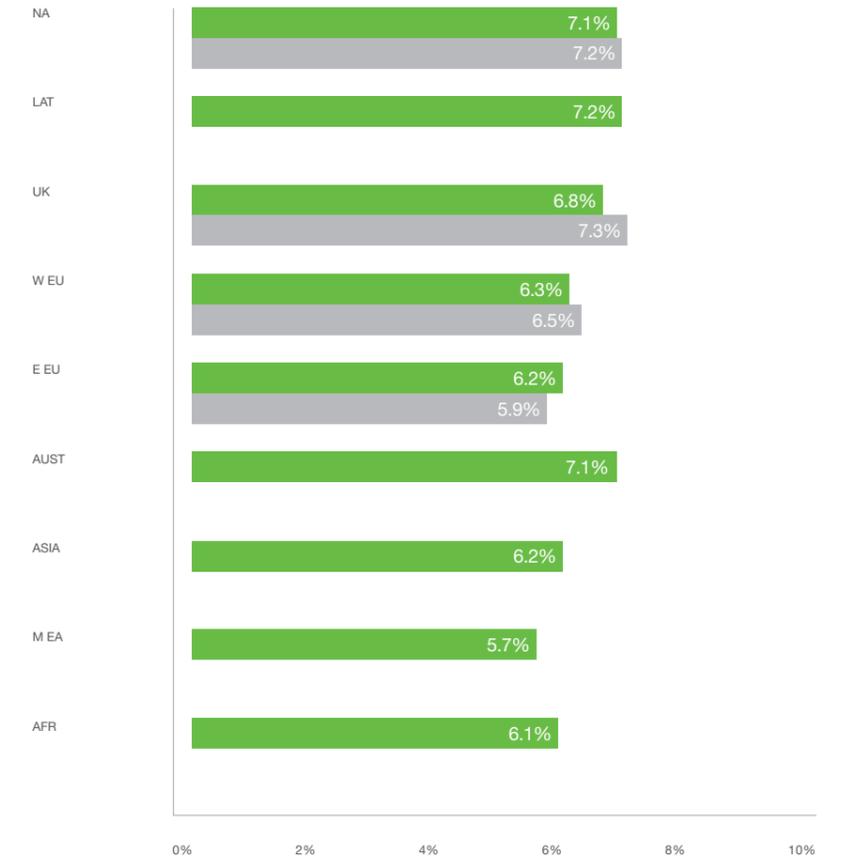
GLOBAL OVERVIEW

TRENDS & ATTITUDES

Continued

INFORMATION PROCESS:

The media in this market respect the role public relations people play in the information process



2013
2012

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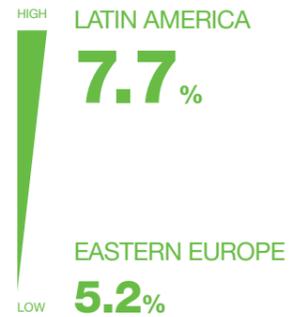
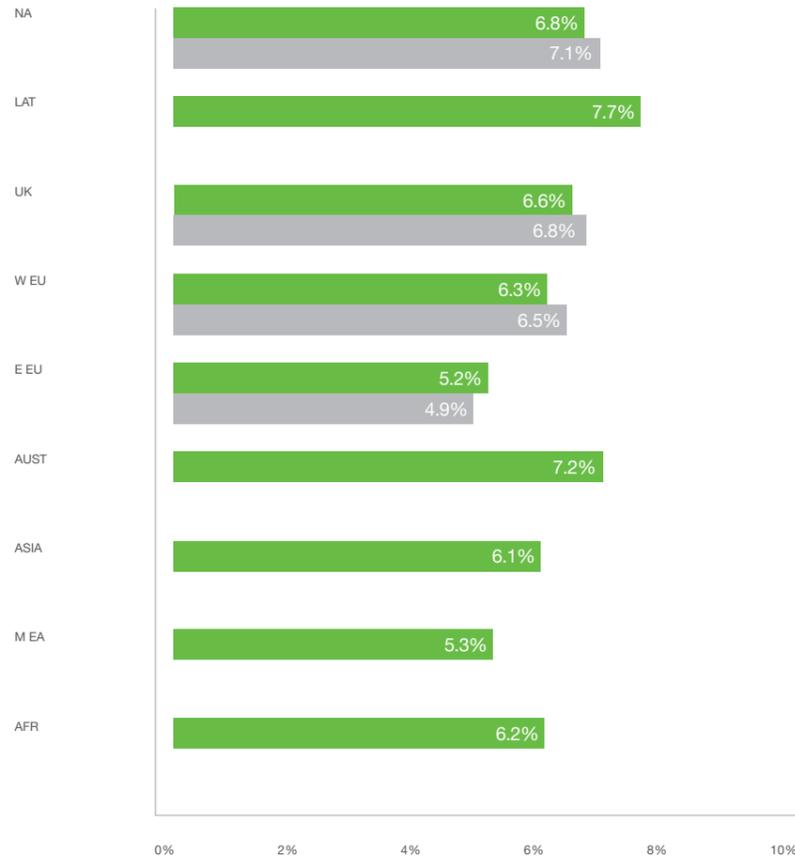
GLOBAL OVERVIEW

TRENDS & ATTITUDES

Continued

INTEGRITY AND IMPARTIALITY:

The media here operate with integrity and impartiality



2013
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GLOBAL OVERVIEW

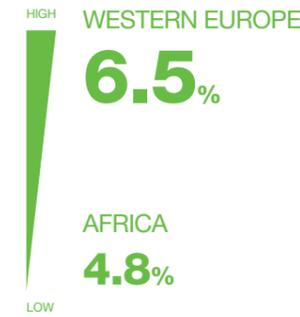
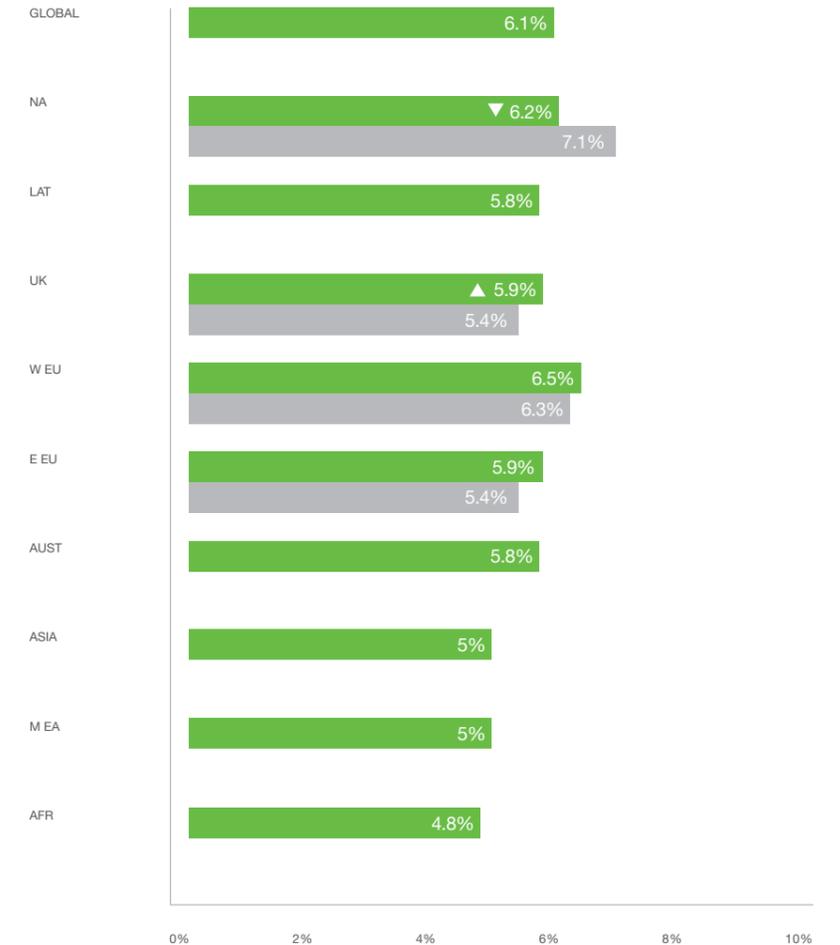
TRENDS & ATTITUDES

Continued

TALENT:

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

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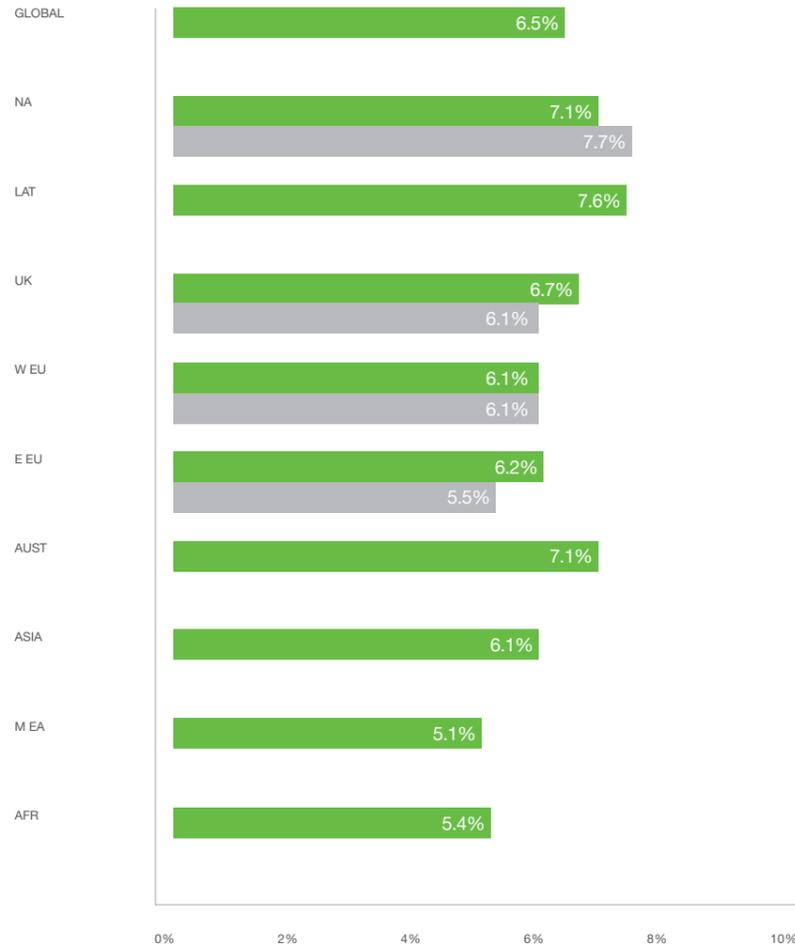
GLOBAL OVERVIEW

TRENDS & ATTITUDES

Continued

LEADERSHIP:

The public relations industry in this marketplace has strong, respected leadership



ADVERT

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OPPORTUNITIES & CHALLENGES

GLOBAL INVESTMENT PLANS

INVESTMENT:

In which of the following areas do you expect to increase your investment this year?

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SOCIAL MEDIA COMMUNITY MANAGEMENT

62.9%

SENIOR COUNSEL

34.5%

DIGITAL BUILD AND PRODUCTION

34.2%

DIGITAL BUILD AND PRODUCTION

24.8%

DIGITAL BUILD AND PRODUCTION

17.1%

SENIOR COUNSEL

14.5%

HIGH
LOW

OPPORTUNITIES & CHALLENGES

GLOBAL INVESTMENT PLANS

Continued

SOCIAL MEDIA COMMUNITY MANAGEMENT

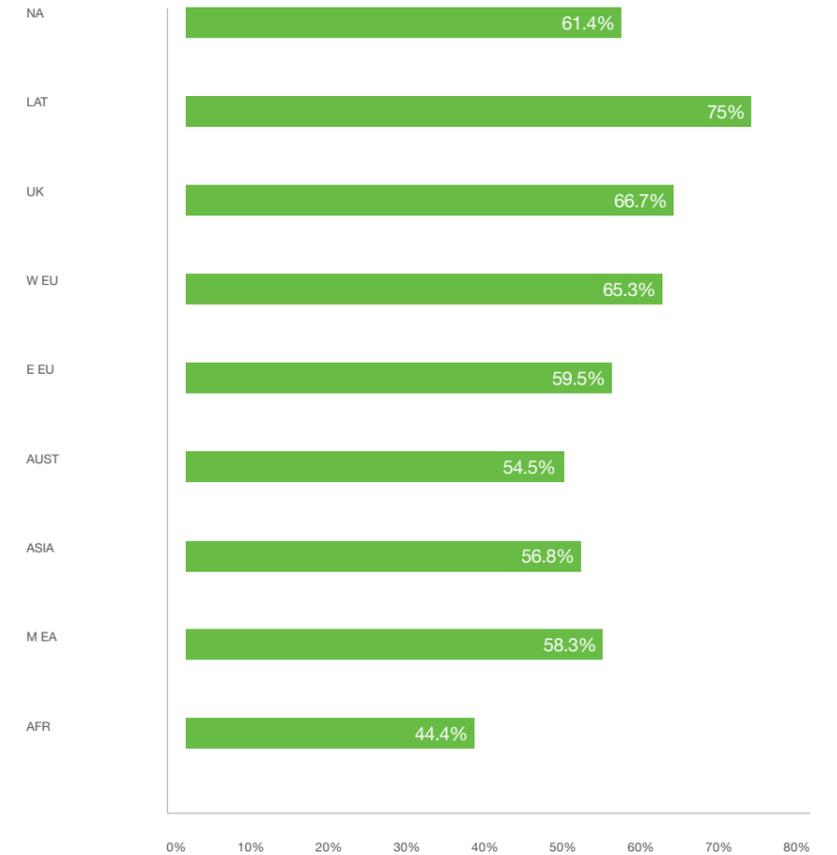
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OPPORTUNITIES & CHALLENGES

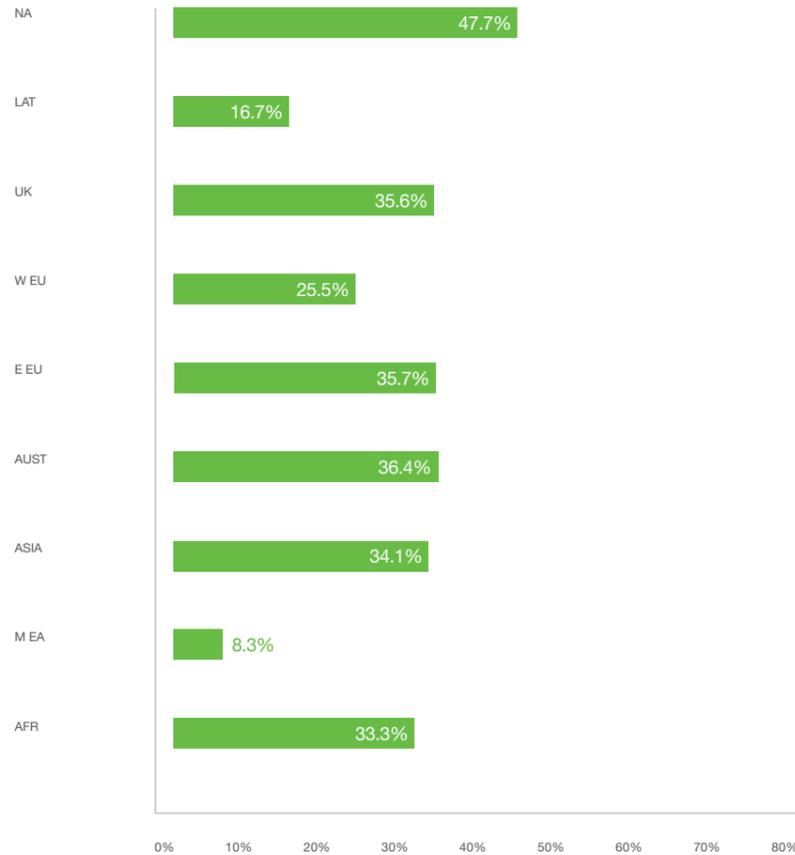
GLOBAL INVESTMENT PLANS

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DIGITAL BUILD AND PRODUCTION

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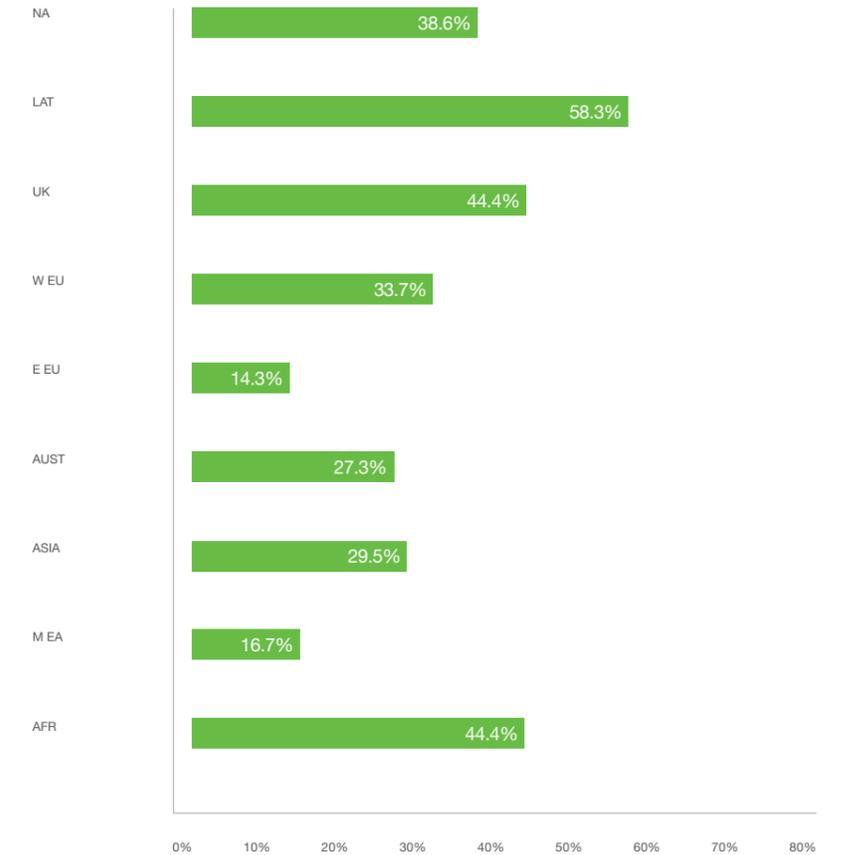
GLOBAL INVESTMENT PLANS

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MULTIMEDIA CONTENT CREATION

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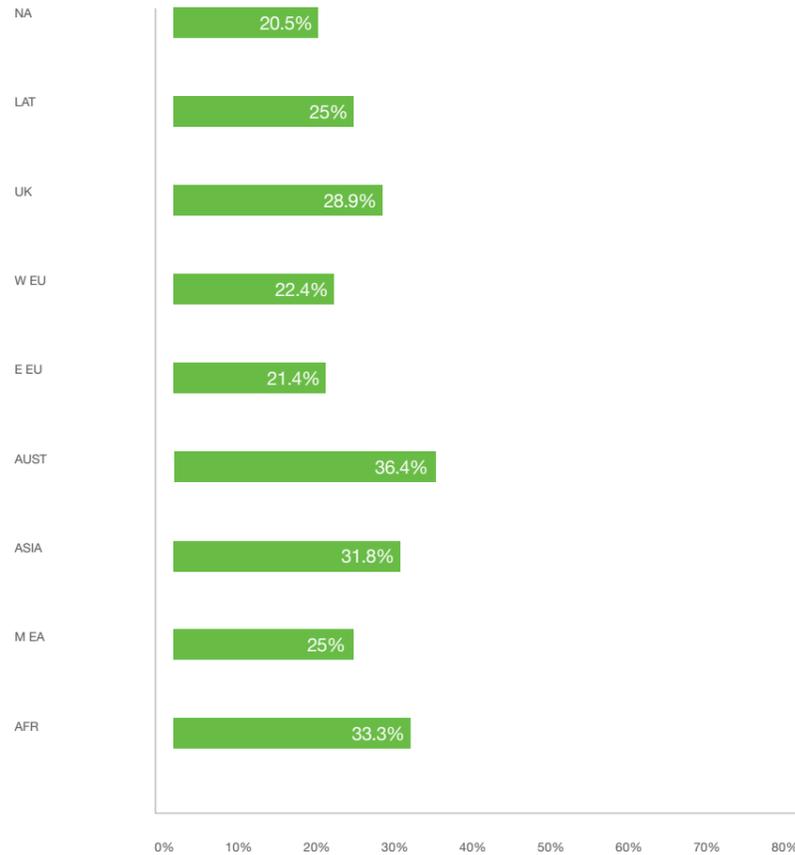
GLOBAL INVESTMENT PLANS

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INSIGHT AND PLANNING

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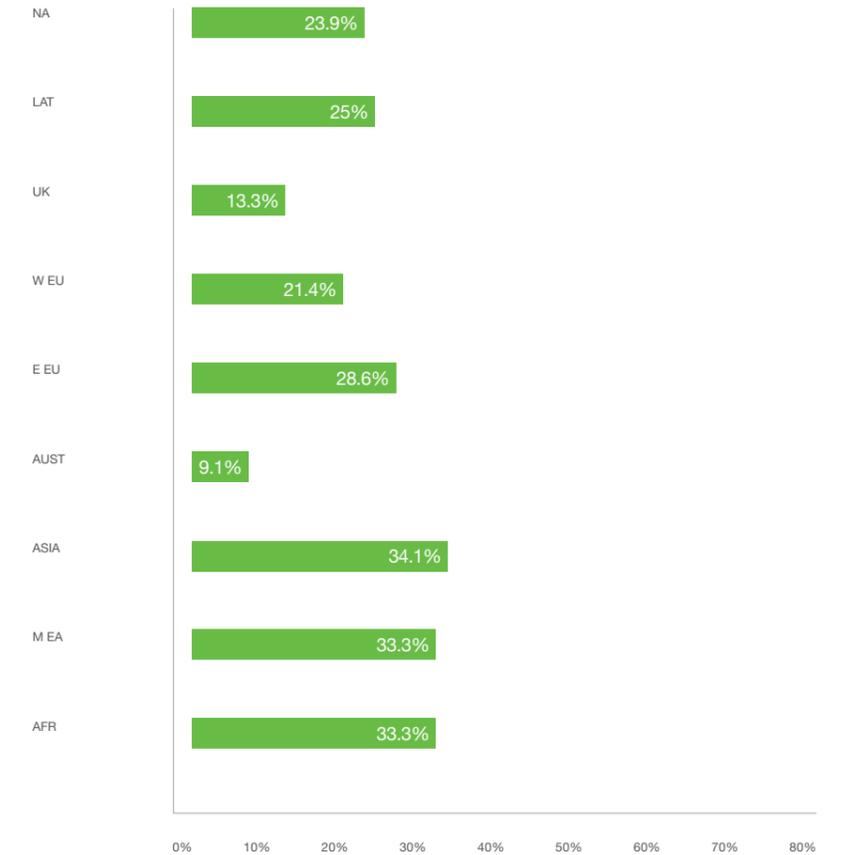
GLOBAL INVESTMENT PLANS

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PROFESSIONAL DEVELOPMENT

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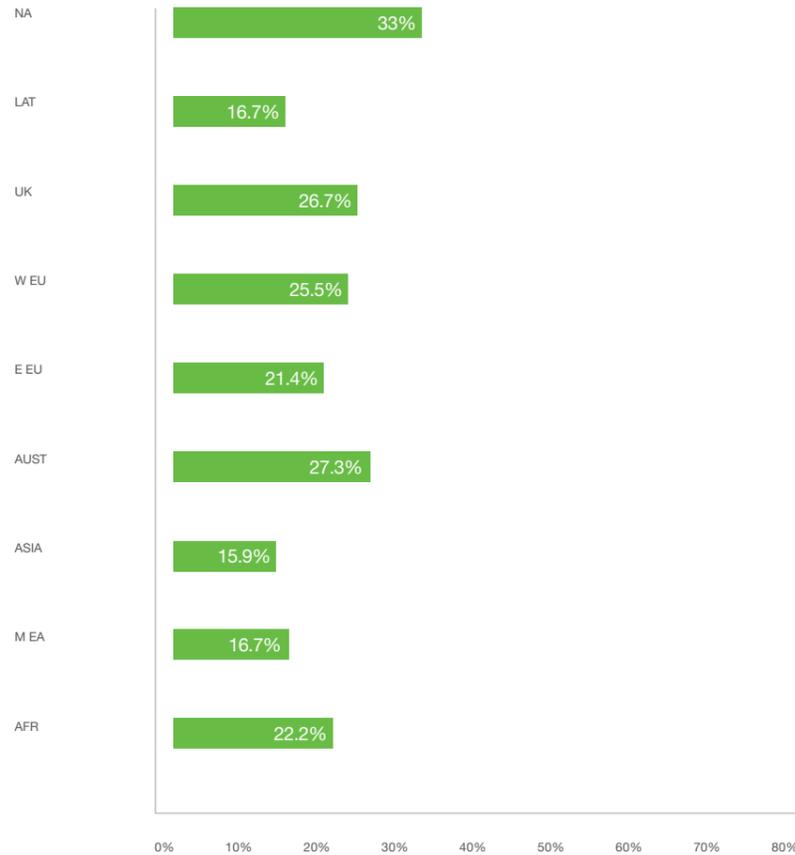
GLOBAL INVESTMENT PLANS

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CREATIVITY

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OPPORTUNITIES & CHALLENGES

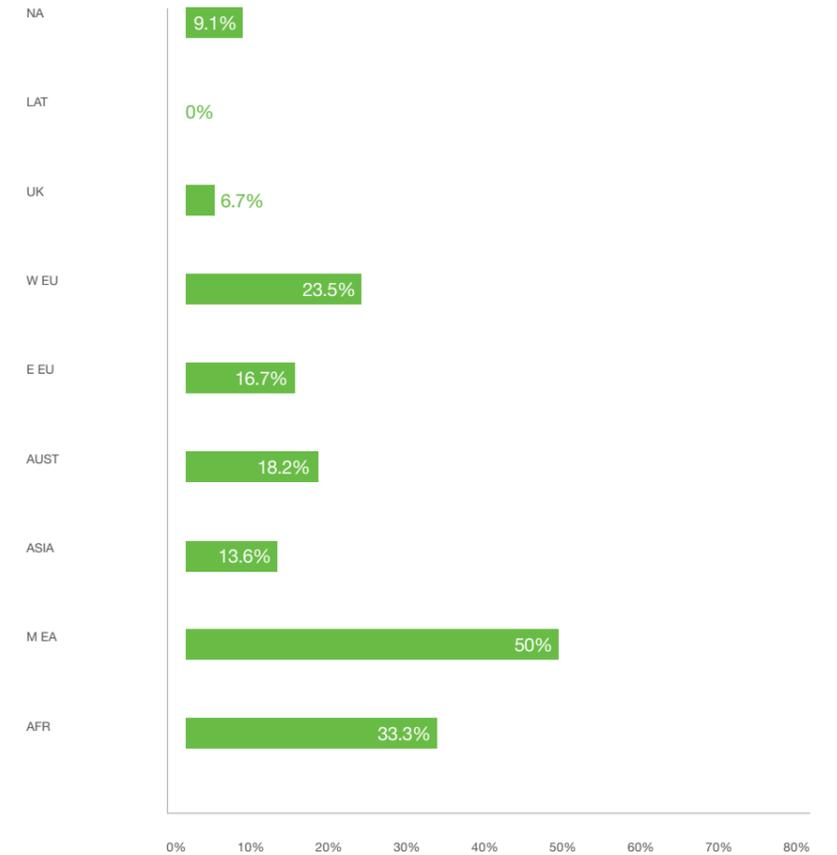
GLOBAL INVESTMENT PLANS

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MEDIA RELATIONS

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OPPORTUNITIES & CHALLENGES

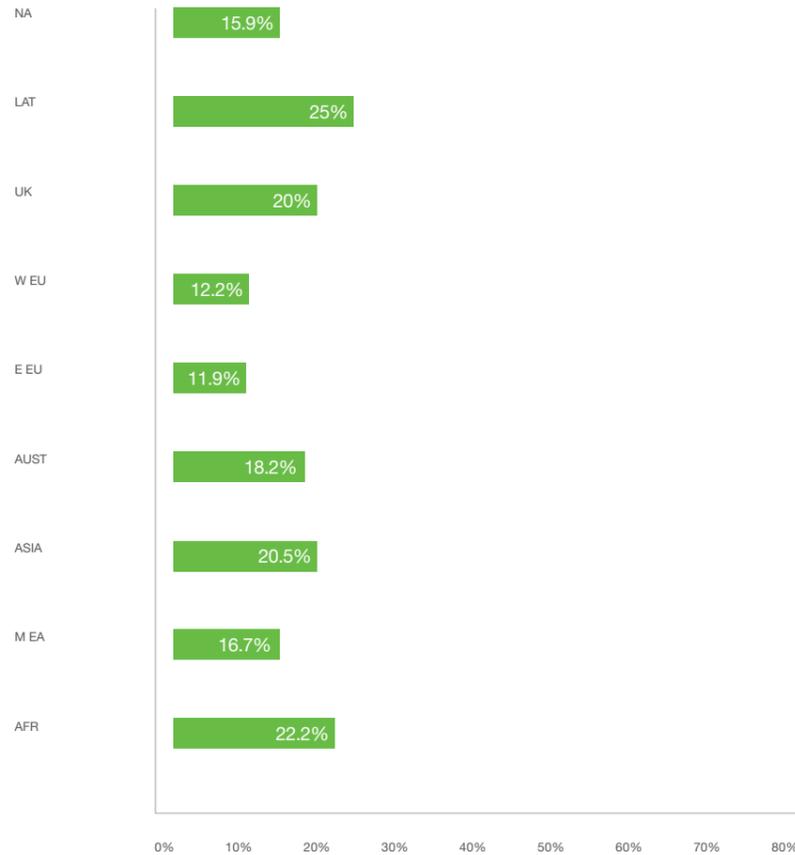
GLOBAL INVESTMENT PLANS

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RESEARCH

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OPPORTUNITIES & CHALLENGES

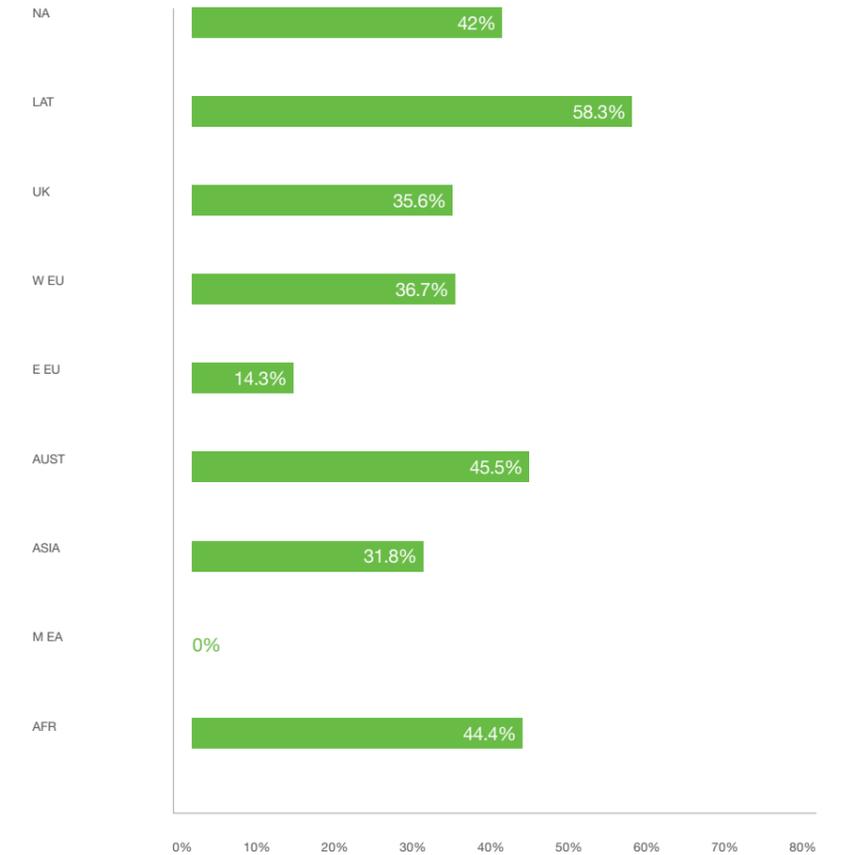
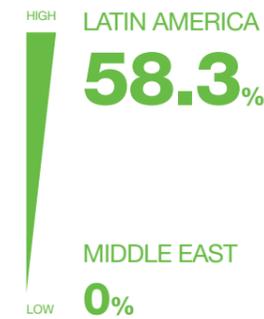
GLOBAL INVESTMENT PLANS

Continued

MEASUREMENT AND ANALYTICS

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OPPORTUNITIES & CHALLENGES

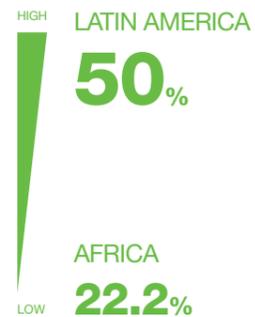
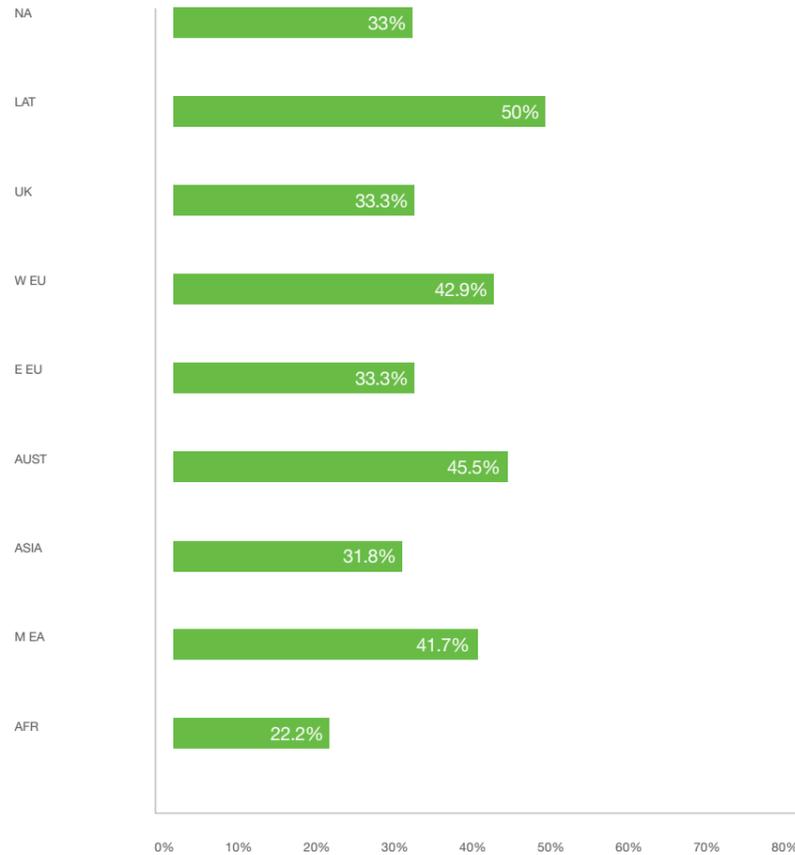
GLOBAL INVESTMENT PLANS

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SENIOR COUNSEL

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OPPORTUNITIES & CHALLENGES

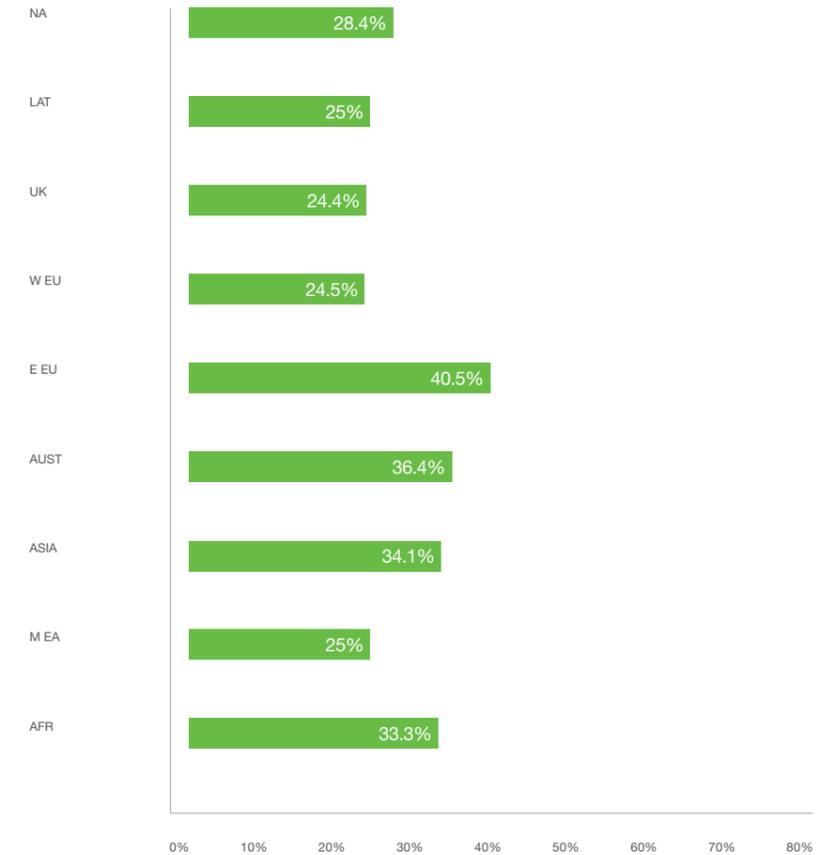
GLOBAL INVESTMENT PLANS

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MANAGEMENT AND BUSINESS DEVELOPMENT

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CHALLENGES GREATEST GLOBAL CHALLENGES

GLOBAL CHALLENGES:

What is the greatest challenge facing the PR industry?

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ECONOMIC CONDITIONS

37.3%

STAFF RECRUITMENT

37.1%

DIGITAL AND NEW TECHNOLOGIES

25.2%

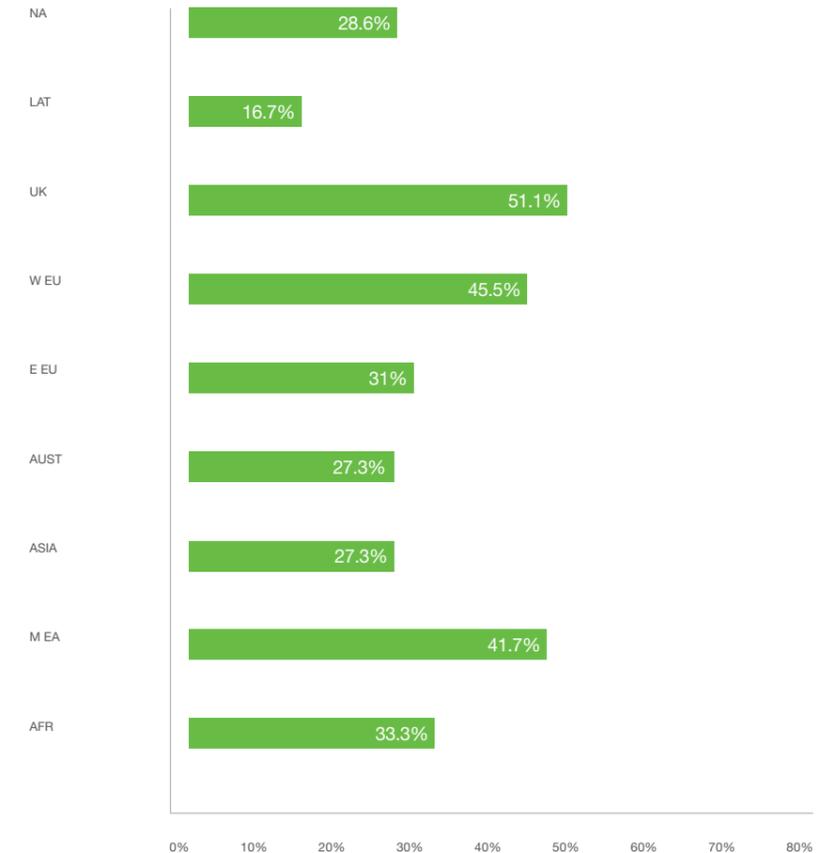
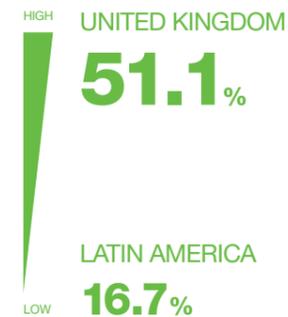
CHALLENGES GREATEST GLOBAL CHALLENGES

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ECONOMIC CONDITIONS

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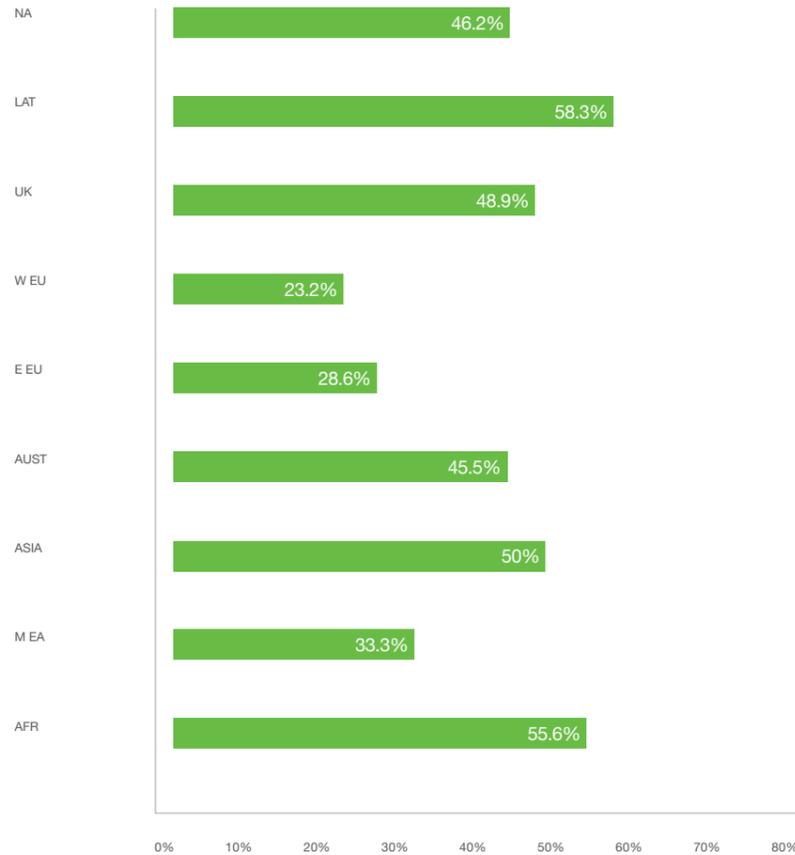
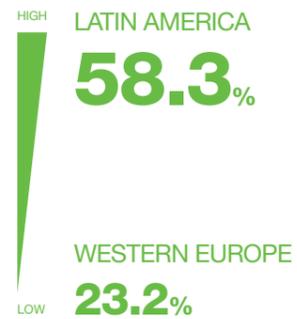
CHALLENGES GREATEST GLOBAL CHALLENGES

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STAFF RECRUITMENT

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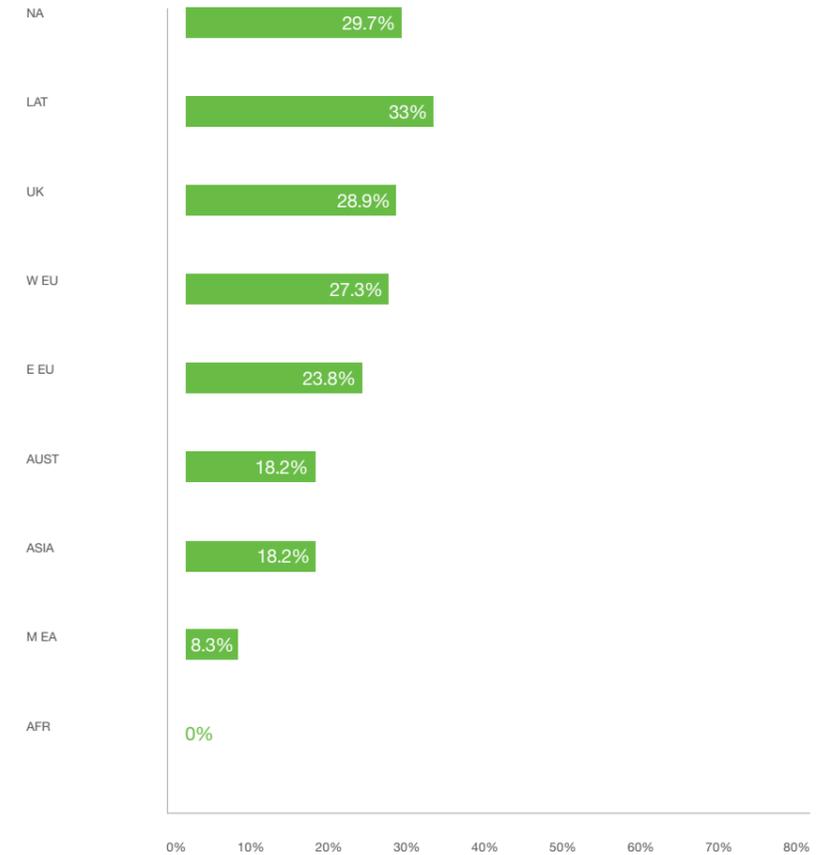
CHALLENGES GREATEST GLOBAL CHALLENGES

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DIGITAL AND NEW TECHNOLOGIES

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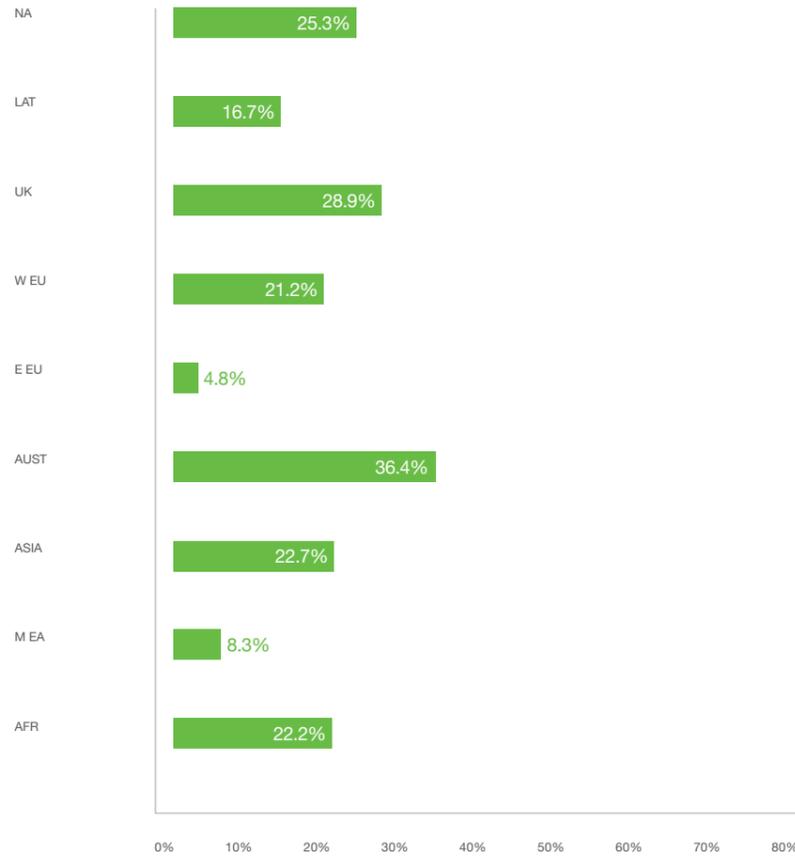
CHALLENGES GREATEST GLOBAL CHALLENGES

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COMPETITION FROM OTHER MARKETING DISCIPLINES

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2013
2012

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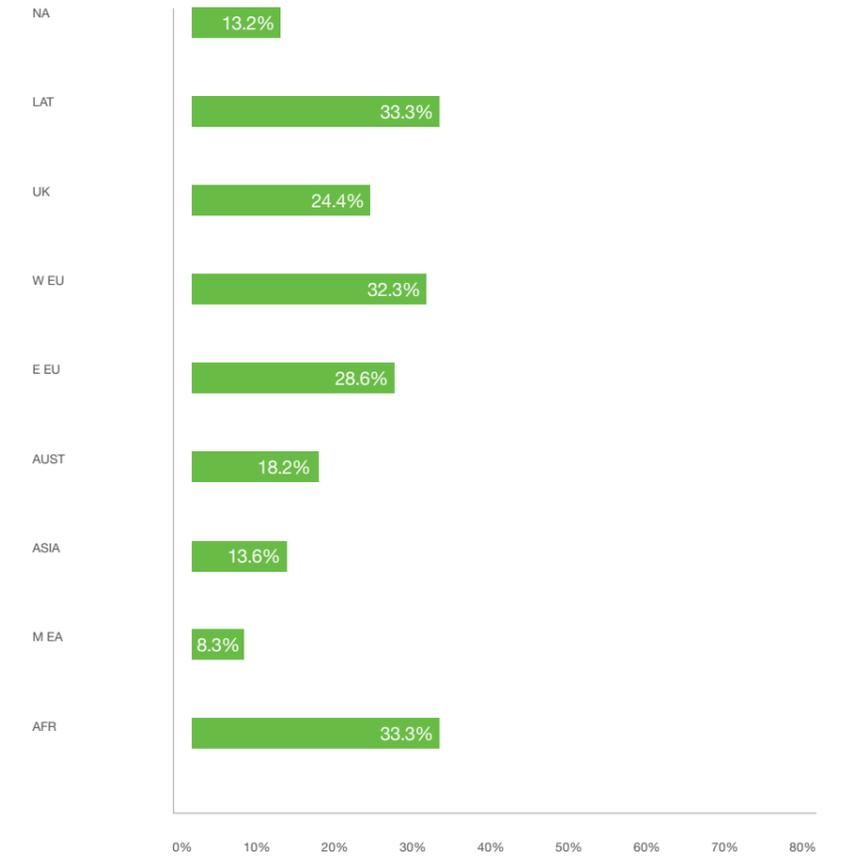
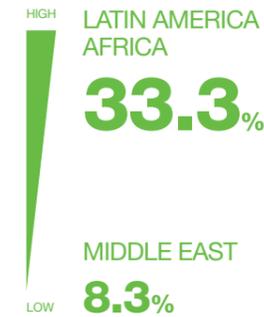
CHALLENGES GREATEST GLOBAL CHALLENGES

Continued

FINANCIAL PRESSURE TO MEET PROFIT TARGETS

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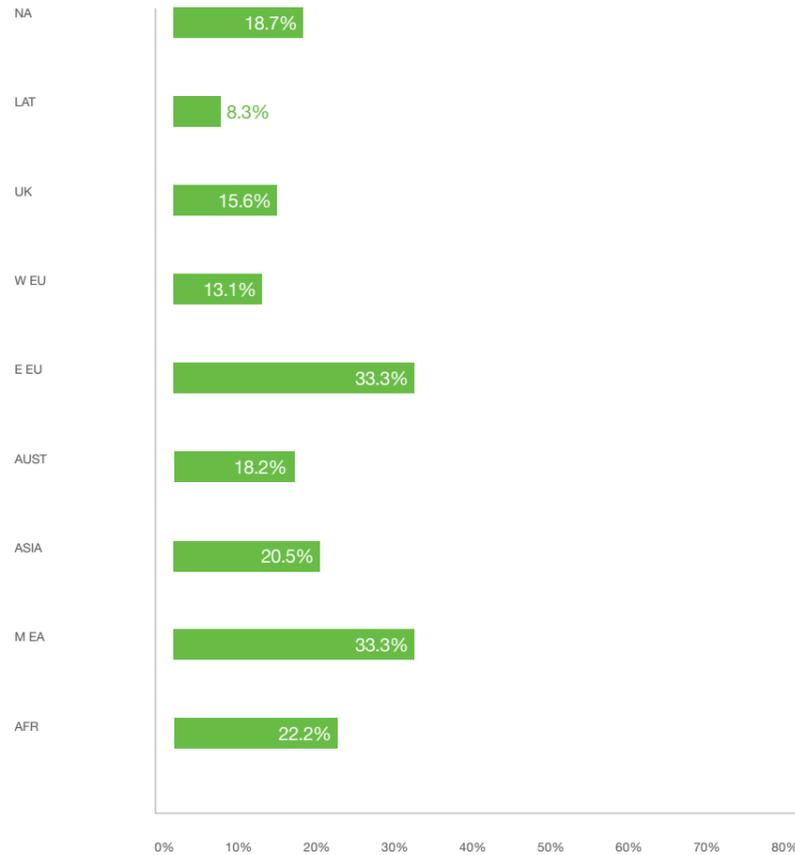
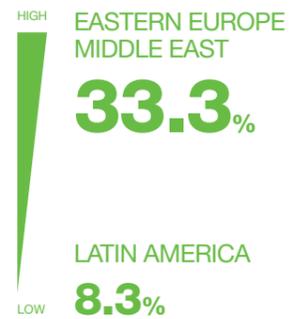
CHALLENGES GREATEST GLOBAL CHALLENGES

Continued

LACK OF CLIENT UNDERSTANDING

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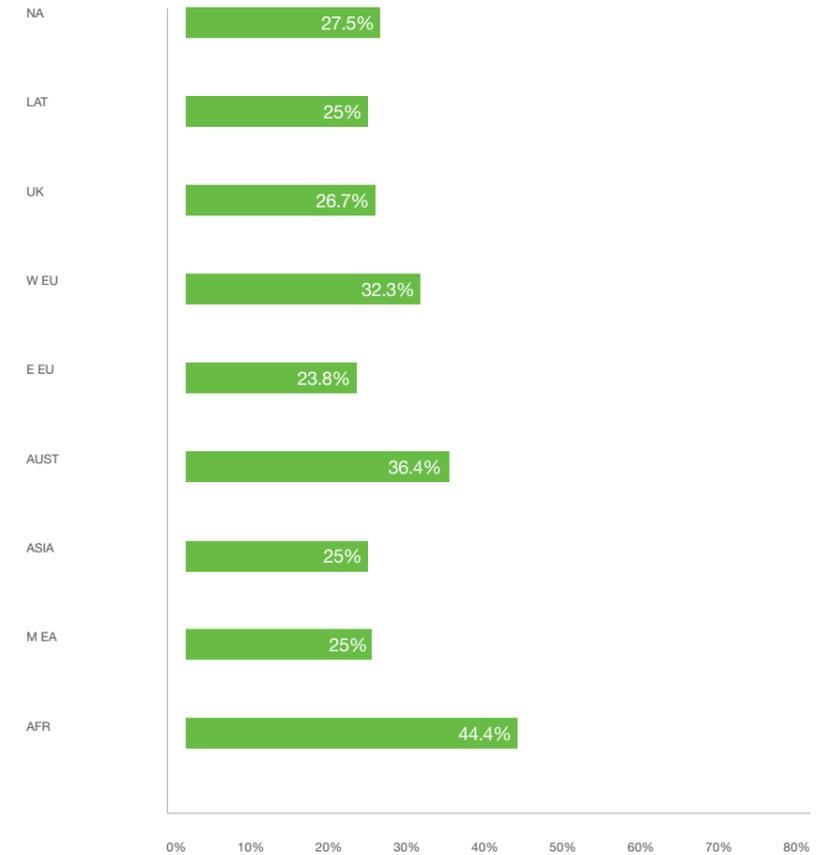
CHALLENGES GREATEST GLOBAL CHALLENGES

Continued

CLIENTS UNWILLING TO COMMIT FUNDS

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CHALLENGES

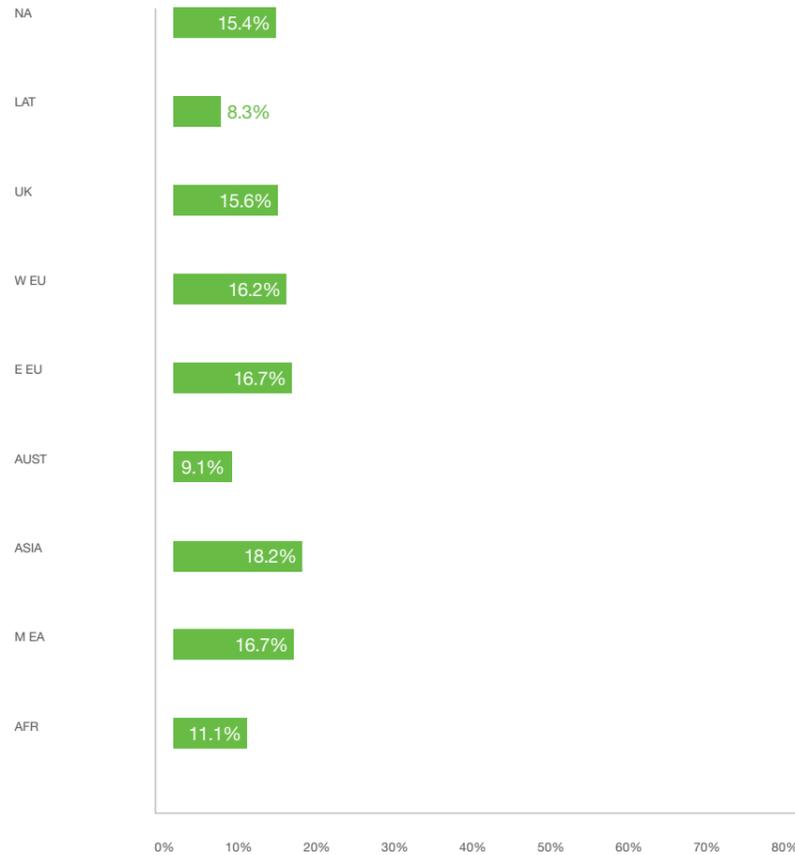
GREATEST GLOBAL CHALLENGES

Continued

INABILITY TO EFFECTIVELY MEASURE IMPACT OF PR

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ADVERT

2013
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GROWTH GLOBAL PRACTICE AREA GROWTH

IN WHICH PRACTICE AREA DID YOU EXPERIENCE MOST GROWTH LAST YEAR?

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DIGITAL & ONLINE COMMUNICATIONS

75.3%

CORPORATE REPUTATION

49.7%

MARKETING COMMUNICATIONS

46.4%

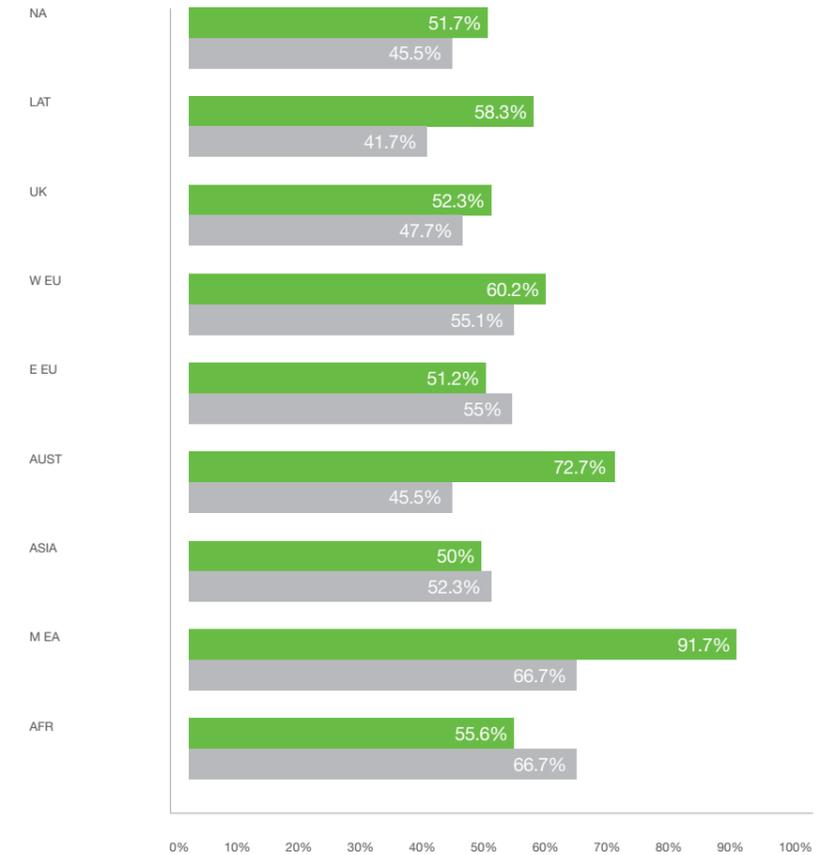
GROWTH GLOBAL PRACTICE AREA GROWTH

Continued

CORPORATE REPUTATION

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GROWTH

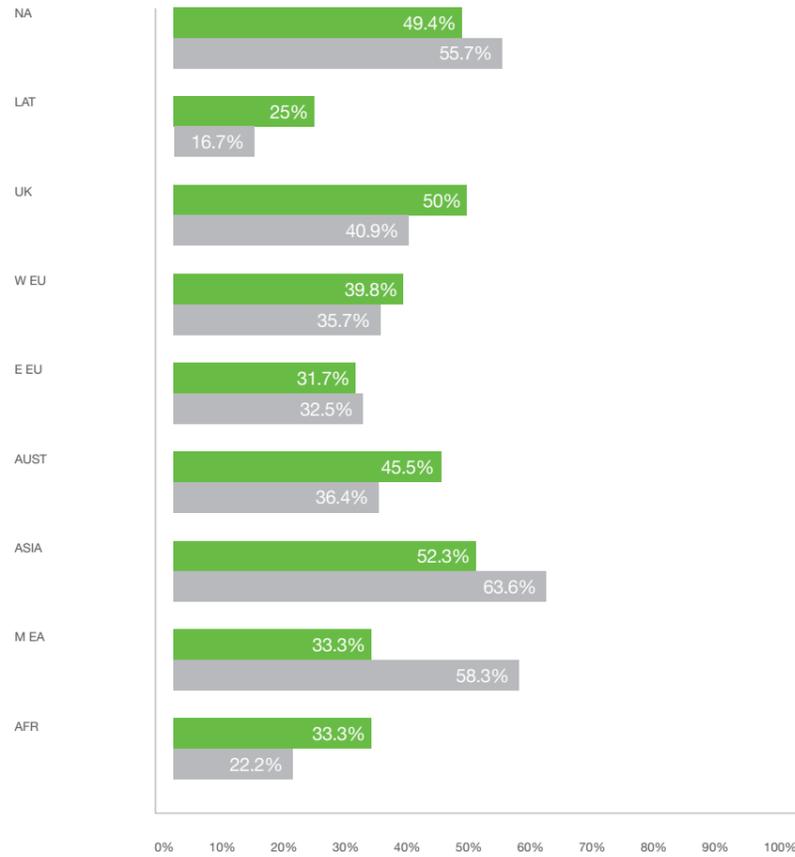
GLOBAL PRACTICE AREA GROWTH

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MARKETING COMMUNICATIONS

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GROWTH

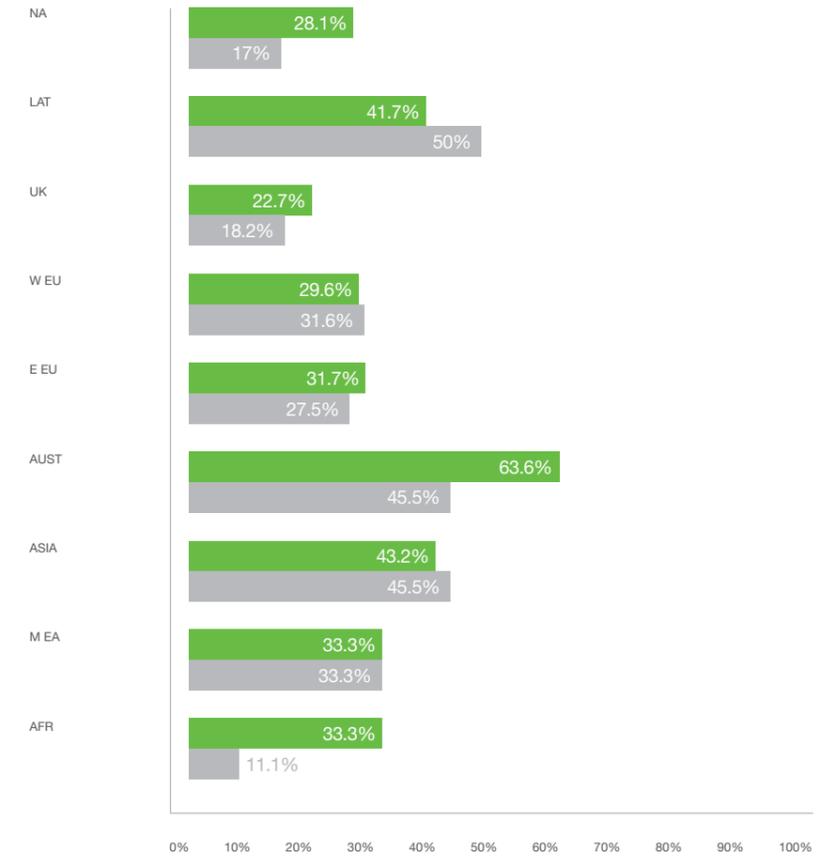
GLOBAL PRACTICE AREA GROWTH

Continued

PUBLIC AFFAIRS

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GROWTH

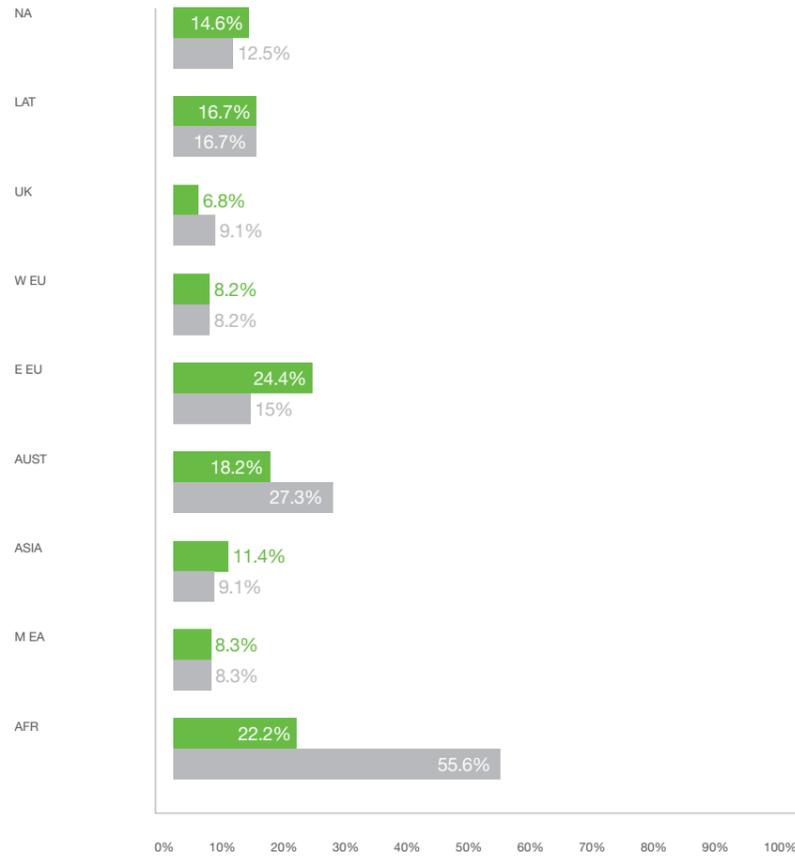
GLOBAL PRACTICE AREA GROWTH

Continued

INVESTOR RELATIONS

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GROWTH

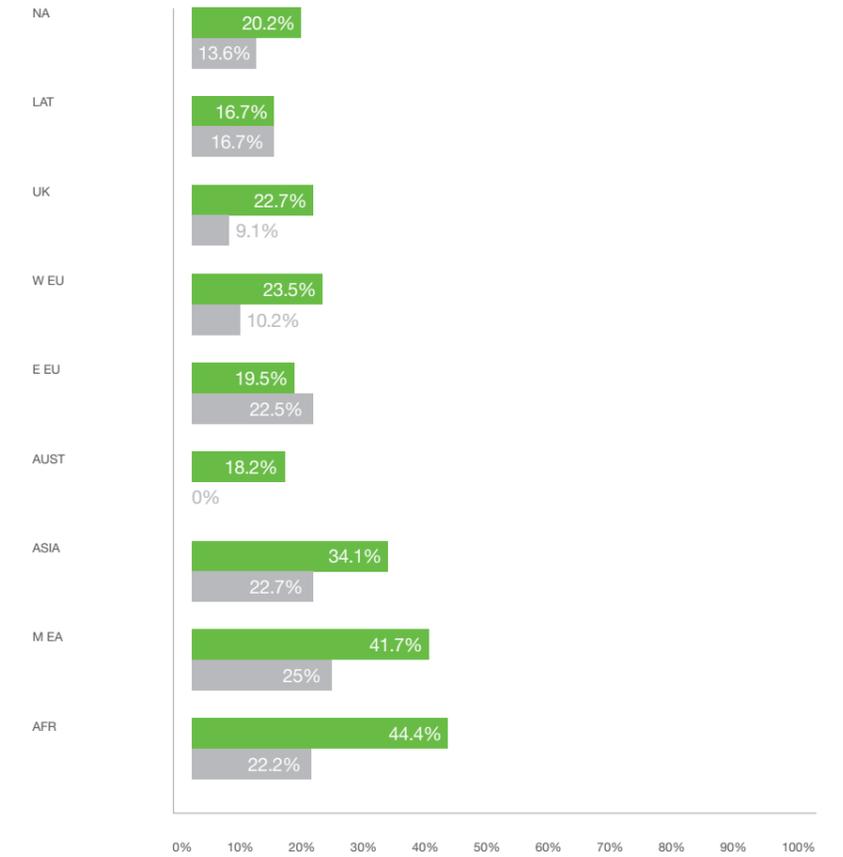
GLOBAL PRACTICE AREA GROWTH

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SOCIAL RESPONSIBILITY

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GROWTH

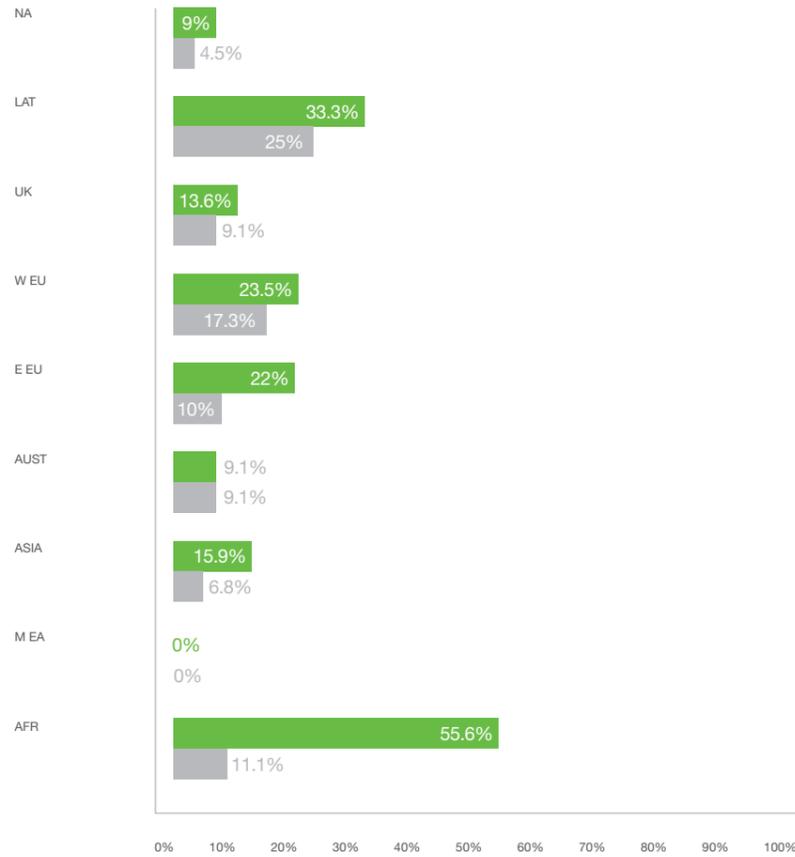
GLOBAL PRACTICE AREA GROWTH

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EMPLOYEE COMMUNICATIONS

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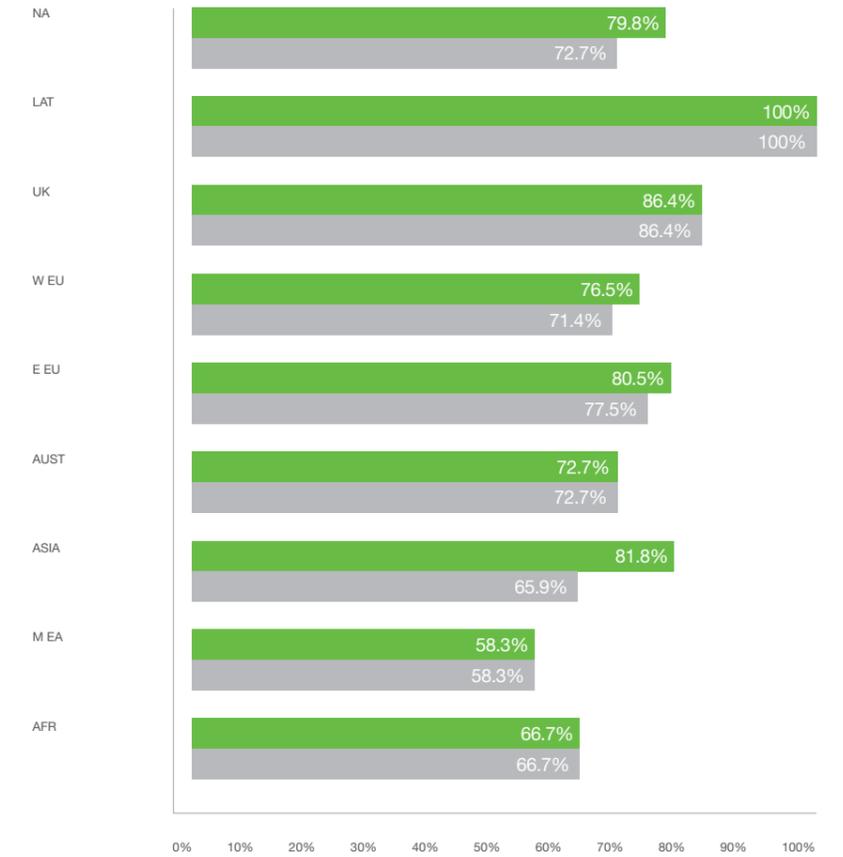
GLOBAL PRACTICE AREA GROWTH

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DIGITAL ONLINE

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GROWTH

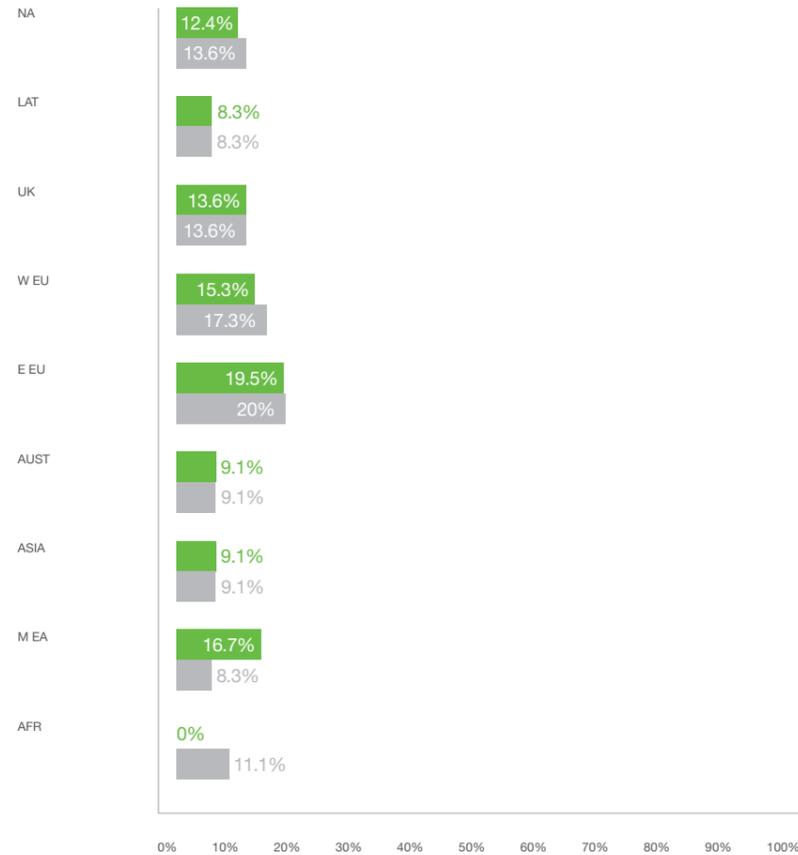
GLOBAL PRACTICE AREA GROWTH

Continued

WORD OF MOUTH

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GROWTH

GLOBAL INDUSTRY SECTOR GROWTH

IN WHICH INDUSTRY SECTOR DID YOU EXPERIENCE MOST GROWTH LAST YEAR?

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CONSUMER PRODUCTS

49.5%

TECHNOLOGY

42.7%

HEALTHCARE

39.4%

NEXT YEAR
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GROWTH

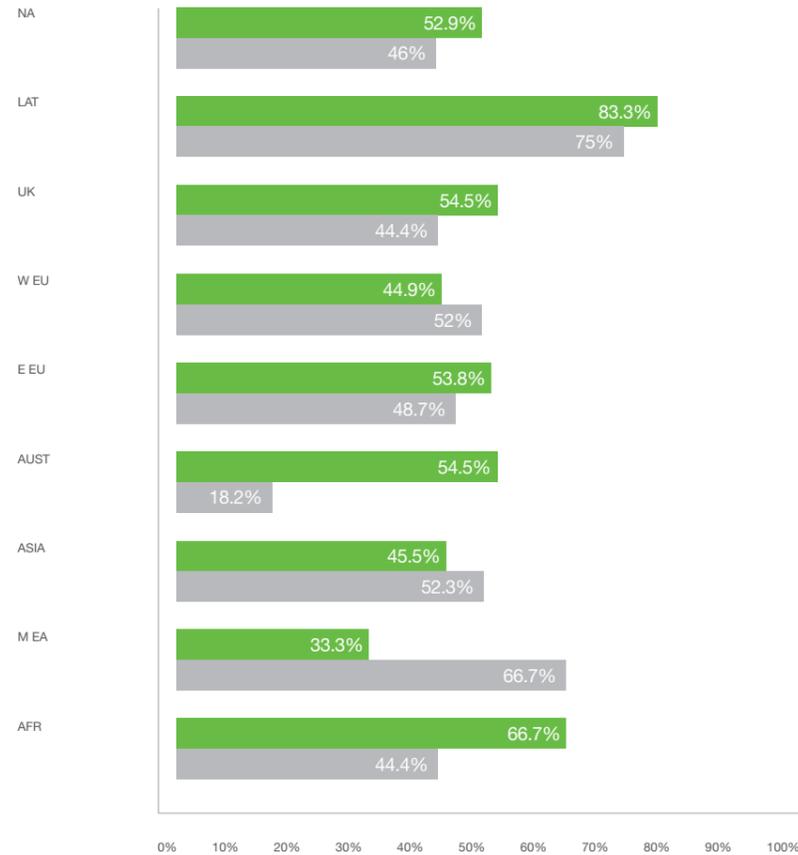
GLOBAL INDUSTRY SECTOR GROWTH

Continued

CONSUMER PRODUCTS

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GROWTH

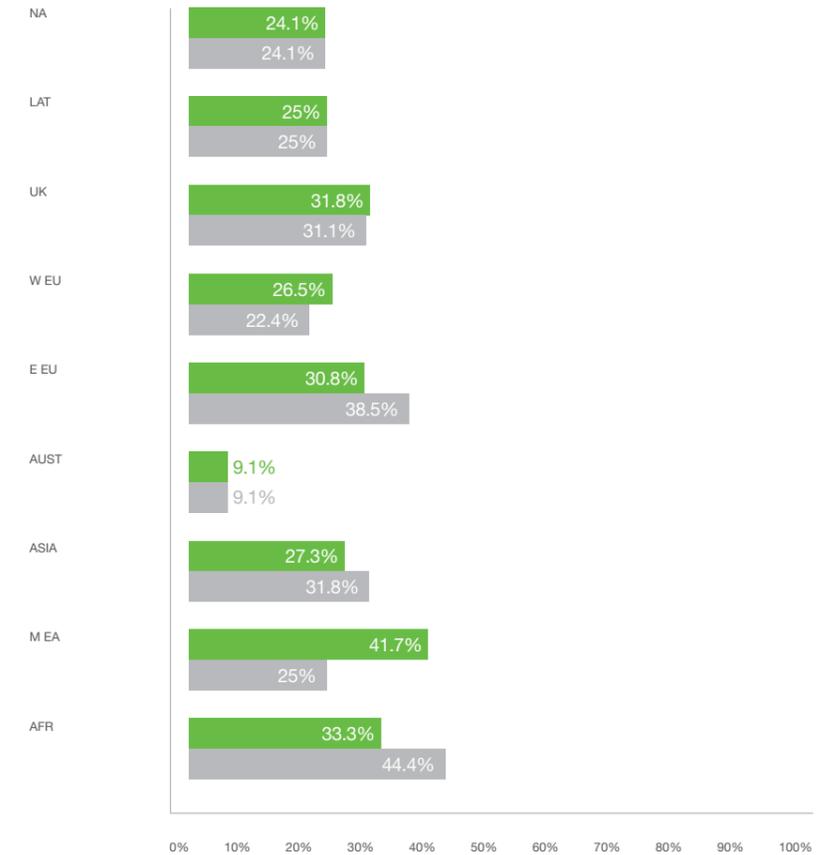
GLOBAL INDUSTRY SECTOR GROWTH

Continued

FOOD AND BEVERAGE

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GROWTH

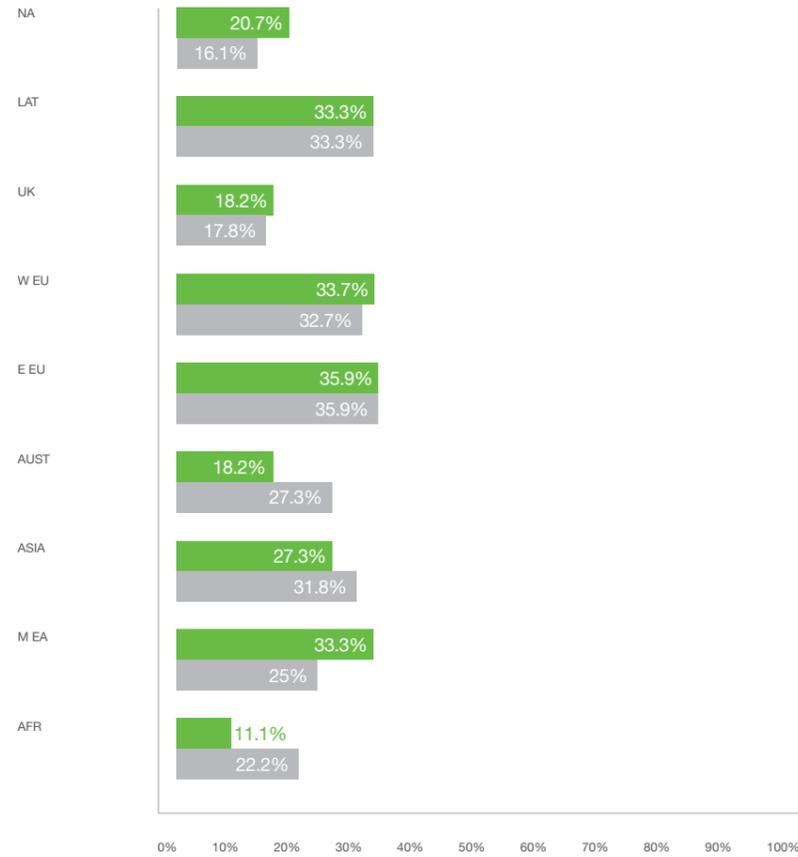
GLOBAL INDUSTRY SECTOR GROWTH

Continued

INDUSTRIAL

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GROWTH

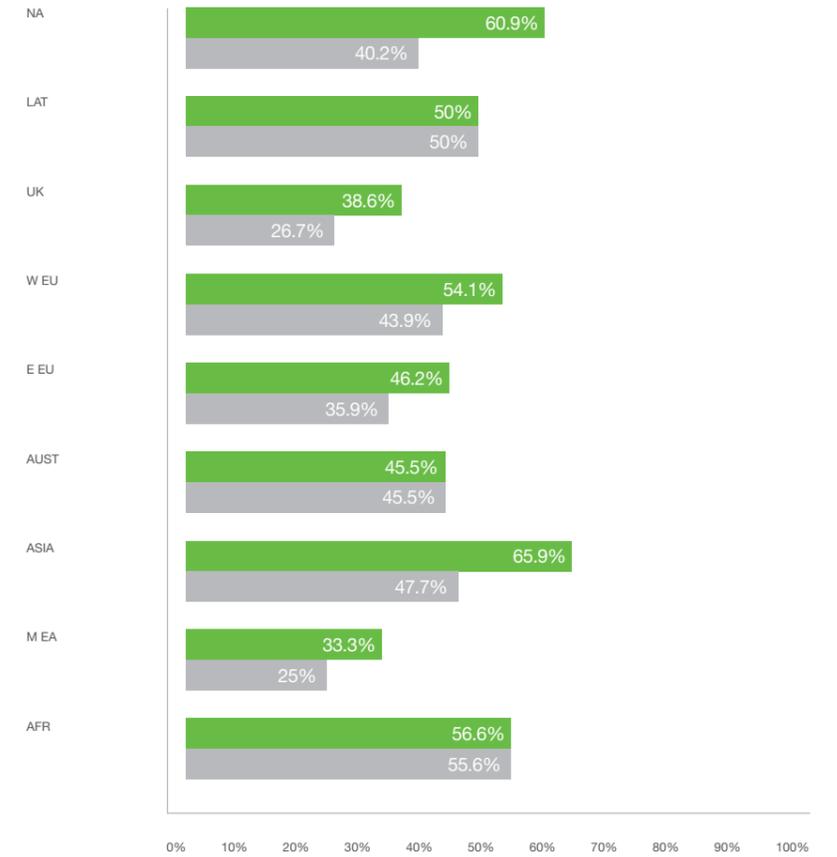
GLOBAL INDUSTRY SECTOR GROWTH

Continued

HEALTHCARE

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NEXT YEAR
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ASIA: ASIA-PACIFIC
M EA: MIDDLE EAST
AFR: AFRICA

GROWTH

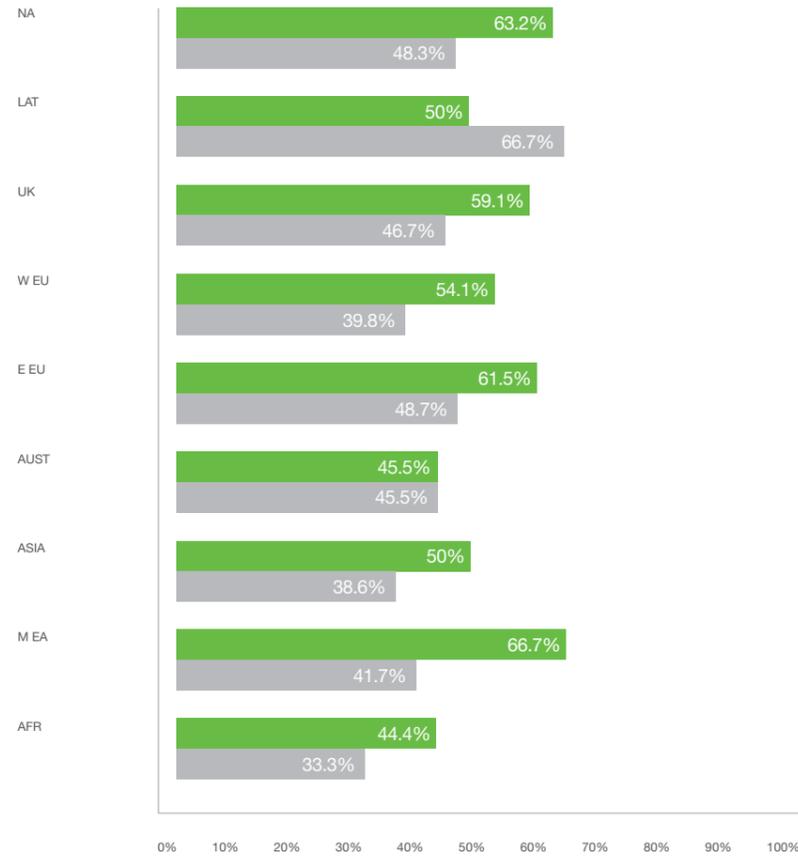
GLOBAL INDUSTRY SECTOR GROWTH

Continued

TECHNOLOGY

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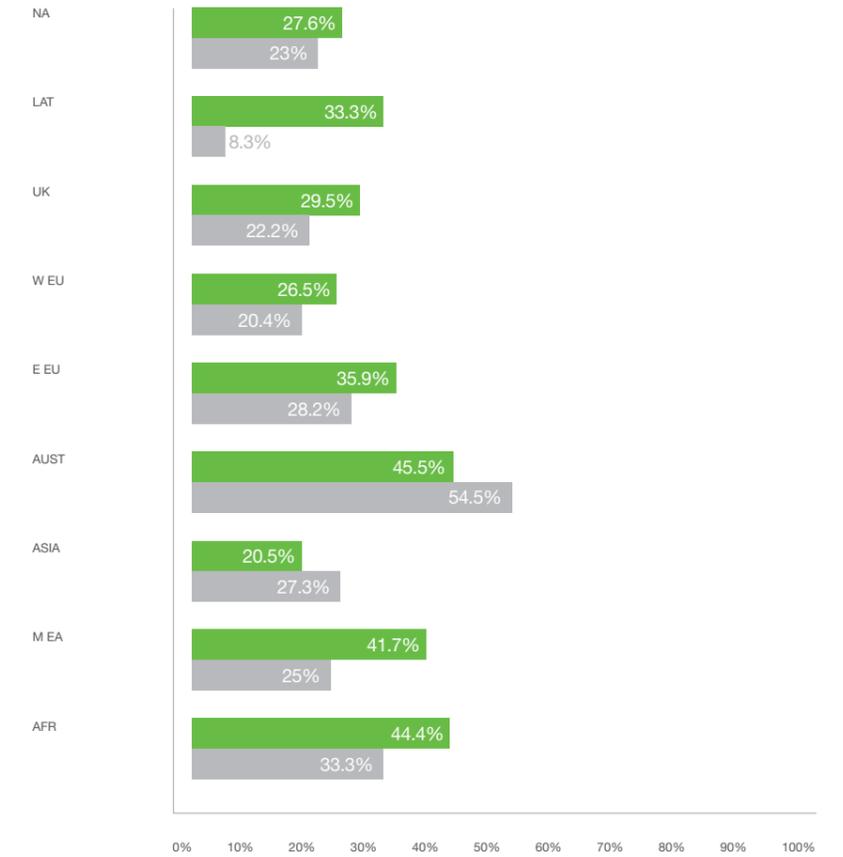
GLOBAL INDUSTRY SECTOR GROWTH

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FINANCIAL/PROFESSIONAL SERVICES

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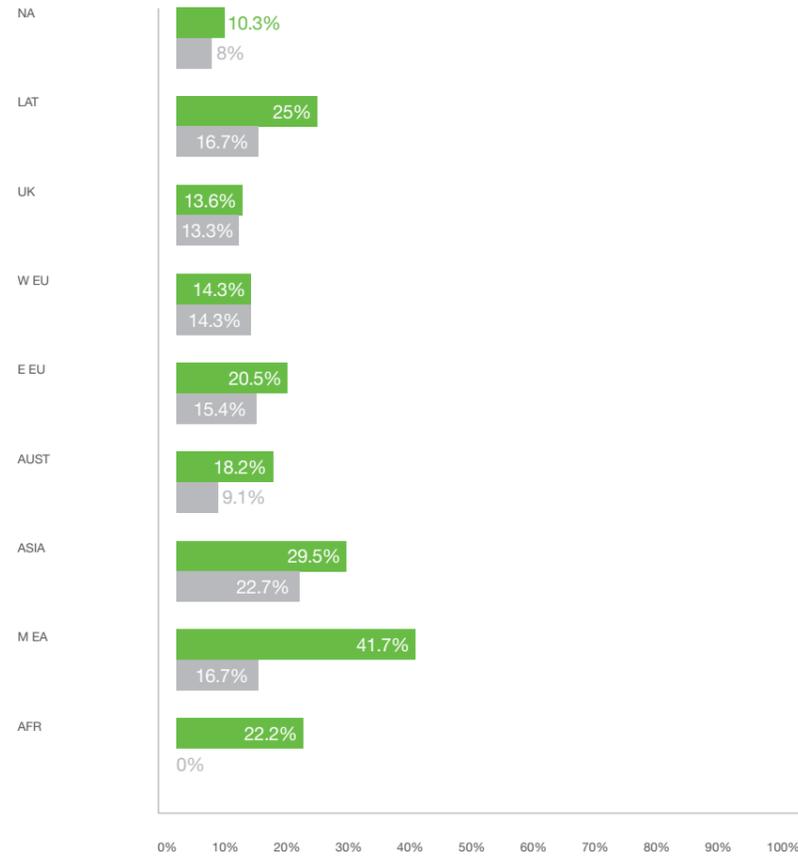
GLOBAL INDUSTRY SECTOR GROWTH

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PUBLIC SECTOR

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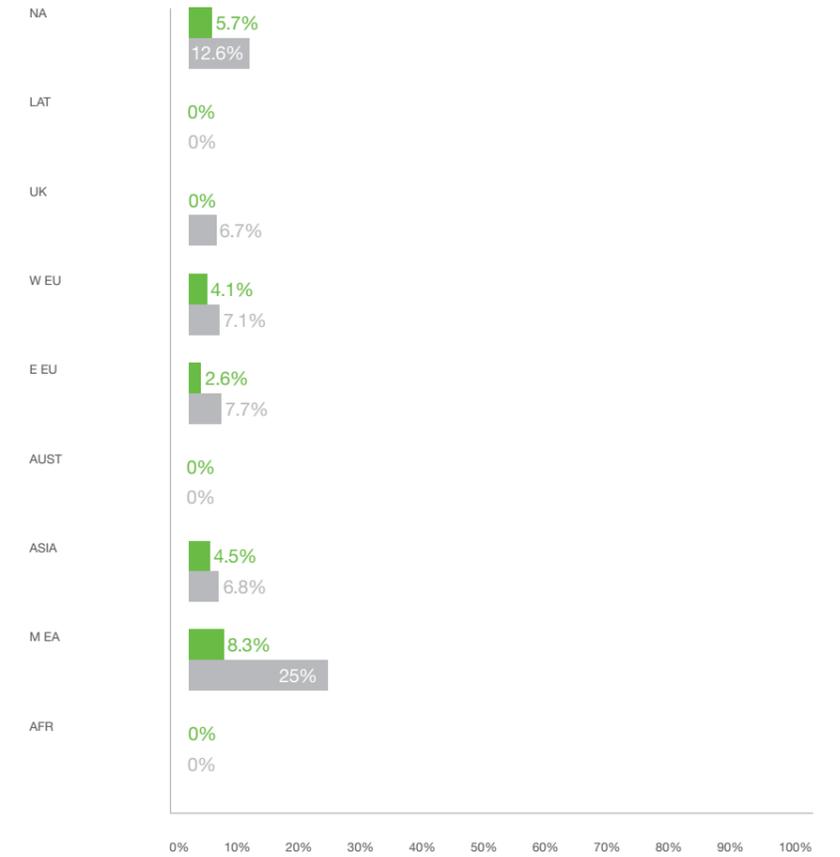
GLOBAL INDUSTRY SECTOR GROWTH

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NON-PROFIT

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LOCAL MARKETS

COUNTRY	TRADE ASSOCIATION	NUMBER OF MEMBER FIRMS	ESTIMATED % OF TOTAL MARKET	BIGGEST PR PRACTICE AREAS BY REVENUE	BIGGEST CHALLENGE AREAS FOR PR FIRMS	BIGGEST PREDICTED AREAS OF GROWTH
AUSTRALIA	REGISTERED CONSULTANCIES GROUP (RCG) OF THE PUBLIC RELATIONS INSTITUTE OF AUSTRALIA	112	40%		STAFF RECRUITMENT; CLIENTS MOVING PR IN-HOUSE; LACK OF CLIENT UNDERSTANDING OF PR	CORPORATE REPUTATION; MARKETING COMMUNICATIONS; DIGITAL/ ONLINE COMMUNICATIONS
AUSTRIA	PRVA AND PR QUALITY AUSTRIA	73	90%	INDUSTRIAL/ MANUFACTURING, TECHNOLOGY, FINANCIAL AND PROFESSIONAL SERVICES	COMPETITION FROM OTHER MARKETING DISCIPLINES; GENERAL ECONOMIC CONDITIONS; SHORT-TERM CLIENT FOCUS	CORPORATE REPUTATION, SOCIAL RESPONSIBILITY, DIGITAL/ONLINE COMMUNICATIONS
BELGIUM	BELGIAN PUBLIC RELATIONS CONSULTANTS ASSOCIATION (BPRCA)	28	70%	CONSUMER PRODUCTS, INDUSTRIAL/ MANUFACTURING	GENERAL ECONOMIC CONDITIONS; CLIENTS UNWILLING TO COMMIT SUFFICIENT FUNDS; CLIENTS TOO FOCUSED ON SHORT-TERM	CORPORATE REPUTATION; DIGITAL/ONLINE COMMUNICATIONS
BRAZIL	BRAZILIAN ASSOCIATION OF COMMUNICATIONS AGENCIES (ABRACOM)	385	45%	CONSUMER PRODUCTS, TECHNOLOGY, PUBLIC SECTOR	STAFF RECRUITMENT; FINANCIAL PRESSURE TO MEET PROFIT/MARGIN TARGETS; ECONOMIC CONDITIONS GENERALLY	CORPORATE REPUTATION; PUBLIC AFFAIRS/ GOVERNMENT RELATIONS; EMPLOYEE COMMUNICATIONS
BULGARIA	BULGARIAN ASSOCIATION OF PR AGENCIES (BAPRA)	18	75%	TECHNOLOGY, FINANCIAL AND PROFESSIONAL SERVICES, PUBLIC SECTOR	CLIENTS TOO FOCUSED ON SHORT-TERM; GENERAL ECONOMIC CONDITIONS; MEDIA CORRUPTION	CORPORATE REPUTATION; MARKETING COMMUNICATIONS; DIGITAL/ ONLINE COMMUNICATIONS
CROATIA	CROATIAN ASSOCIATION OF COMMUNICATION AGENCIES (HRVATSKA UDRUGA KOMUNIKACIJSKIH AGENCIJA - HUKA)	13	70%	CORPORATE, DIGITAL, HEALTHCARE	CLIENTS MOVING PR IN-HOUSE; FINANCIAL PRESSURE TO MEET PROFIT/ MARGIN TARGETS; GENERAL ECONOMIC CONDITIONS	PUBLIC AFFAIRS/ GOVERNMENT RELATIONS; EMPLOYEE COMMUNICATIONS; DIGITAL/ ONLINE COMMUNICATIONS
CZECH REPUBLIC	ASSOCIATION OF PUBLIC RELATIONS AGENCIES (APRA)	22	75%	CONSUMER PRODUCTS, FOOD AND BEVERAGE, FINANCIAL AND PROFESSIONAL SERVICES	STAFF RECRUITMENT; COMPETITION FROM OTHER PROFESSIONAL SERVICE FIRMS; LACK OF CLIENT UNDERSTANDING OF PR	MARKETING COMMUNICATIONS; PUBLIC AFFAIRS/GOVERNMENT RELATIONS; DIGITAL/ONLINE COMMUNICATIONS
DENMARK	PUBLIC RELATIONS BRANCHEN	28	80%	HEALTHCARE, TECHNOLOGY	COMPETITION FROM OTHER MARKETING DISCIPLINES; FINANCIAL PRESSURE TO MEET PROFIT/MARGIN TARGETS; CLIENTS TOO FOCUSED ON SHORT-TERM	MARKETING COMMUNICATIONS; PUBLIC AFFAIRS/GOVERNMENT RELATIONS; DIGITAL/ONLINE COMMUNICATIONS
FINLAND	THE FINNISH ASSOCIATION OF MARKETING COMMUNICATION AGENCIES MTL	98	30%	FOOD AND BEVERAGE, HEALTHCARE, TECHNOLOGY	CLIENTS TOO FOCUSED ON SHORT-TERM; GENERAL ECONOMIC CONDITIONS; INABILITY TO EFFECTIVELY MEASURE IMPACT OF PR	CORPORATE REPUTATION; SOCIAL RESPONSIBILITY; DIGITAL/ONLINE COMMUNICATIONS
FRANCE	SYNTEC CONSEIL EN RELATIONS PUBLICS	40	60%	FOOD AND BEVERAGE, TECHNOLOGY, PUBLIC SECTOR	CLIENTS MOVING PR IN-HOUSE; GENERAL ECONOMIC CONDITIONS; CLIENTS TOO FOCUSED ON SHORT-TERM	CORPORATE REPUTATION; SOCIAL RESPONSIBILITY; DIGITAL/ONLINE COMMUNICATIONS
GERMANY	ASSOCIATION OF PUBLIC RELATIONS AGENCIES (GPRA)	30	40%	CORPORATE COMMUNICATION CONSULTING SOCIAL MEDIA MANAGEMENT, CHANGE PROCESSES, INTEGRATED APPROACH	COMPETITION FROM OTHER MARKETING DISCIPLINES; CLIENTS UNWILLING TO COMMIT SUFFICIENT FUNDS	CORPORATE REPUTATION; PUBLIC AFFAIRS/ GOVERNMENT RELATIONS; DIGITAL/ONLINE COMMUNICATIONS
GREECE	HELLENIC ASSOCIATION OF COMMUNICATIONS AGENCIES (EDEE)	16	70%	FOOD AND BEVERAGE, TECHNOLOGY, FINANCIAL AND PROFESSIONAL SERVICES	PROFESSIONAL DEVELOPMENT; GENERAL ECONOMIC CONDITIONS; FINANCIAL PRESSURE TO MEET PROFIT/MARGIN TARGETS	CORPORATE REPUTATION; PUBLIC AFFAIRS/ GOVERNMENT RELATIONS; DIGITAL/ONLINE COMMUNICATIONS

LOCAL MARKETS

Continued

COUNTRY	TRADE ASSOCIATION	NUMBER OF MEMBER FIRMS	ESTIMATED % OF TOTAL MARKET	BIGGEST PR PRACTICE AREAS BY REVENUE	BIGGEST CHALLENGE AREAS FOR PR FIRMS	BIGGEST PREDICTED AREAS OF GROWTH
INDIA	PUBLIC RELATIONS CONSULTANTS ASSOCIATION OF INDIA (PRCAI)	16	75%	CONSUMER PRODUCTS, FOOD AND BEVERAGE, INDUSTRIAL/ MANUFACTURING	STAFF RETENTION; GENERAL ECONOMIC CONDITIONS; LACK OF CLIENT UNDERSTANDING OF PR	PUBLIC AFFAIRS/ GOVERNMENT RELATIONS; DIGITAL/ONLINE COMMUNICATIONS; SOCIAL RESPONSIBILITY
IRELAND	PUBLIC RELATIONS ASSOCIATION (IRELAND)	30	80%	FOOD AND BEVERAGE, HEALTHCARE, NOT-FOR-PROFIT	COMPETITION FOR CLIENTS FROM OTHER PR FIRMS; GENERAL ECONOMIC CONDITIONS; CLIENTS MOVING PR IN-HOUSE	MARKETING COMMUNICATIONS; DIGITAL/ ONLINE COMMUNICATIONS
ITALY	ASSOREL	45	35%	FOOD AND BEVERAGE, HEALTHCARE	STAFF RECRUITMENT; FINANCIAL PRESSURE TO MEET PROFIT/MARGIN TARGETS; GENERAL ECONOMIC CONDITIONS	DIGITAL/ONLINE COMMUNICATIONS; STAKEHOLDER MANAGEMENT
NORWAY	KOMM	19	80%	PUBLIC SECTOR	COMPETITION FOR CLIENTS FROM OTHER PR FIRMS; COMPETITION FROM OTHER MARKETING DISCIPLINES; MEDIA HOSTILITY TO PR	CORPORATE REPUTATION; MARKETING COMMUNICATIONS; PUBLIC AFFAIRS/GOVERNMENT RELATIONS
POLAND	POLISH PUBLIC RELATIONS CONSULTANCY ASSOCIATION (PPRCA)	40	60%	INDUSTRIAL/ MANUFACTURING, HEALTHCARE, PUBLIC SECTOR	COMPETITION FROM OTHER PROFESSIONAL SERVICE FIRMS; ECONOMIC CONDITIONS GENERALLY; CLIENTS TOO FOCUSED ON SHORT-TERM	CORPORATE REPUTATION; PUBLIC AFFAIRS/ GOVERNMENT RELATIONS; DIGITAL/ONLINE COMMUNICATIONS
PORTUGAL	PORTUGUESE ASSOCIATION OF COMMUNICATIONS AND PUBLIC RELATIONS CONSULTANCIES (APECOM)	23	80%	INDUSTRIAL/ MANUFACTURING, HEALTHCARE, FINANCIAL	PROFESSIONAL DEVELOPMENT; COMPETITION FOR CLIENTS FROM OTHER PR FIRMS; GENERAL ECONOMIC CONDITIONS	CORPORATE REPUTATION; PUBLIC AFFAIRS/ GOVERNMENT RELATIONS; SOCIAL RESPONSIBILITY
RUSSIA	THE RUSSIAN COMMUNICATIONS CONSULTANCIES ASSOCIATION (AKOS)	30	60%	CONSUMER PRODUCTS, INDUSTRIAL/ MANUFACTURING, TECHNOLOGY	STAFF RECRUITMENT; COMPETITION FROM OTHER PROFESSIONAL SERVICE FIRMS; CLIENTS UNWILLING TO COMMIT SUFFICIENT FUNDS	CORPORATE REPUTATION; SOCIAL RESPONSIBILITY; DIGITAL/ONLINE COMMUNICATIONS
SLOVAKIA	ASSOCIATION OF PR AGENCIES IN SLOVAK REPUBLIC (APRSR)	12	70%	CONSUMER PRODUCTS, FOOD AND BEVERAGE, HEALTHCARE	STAFF RECRUITMENT; PR MANAGED AT JUNIOR LEVEL BY CLIENTS; GENERAL ECONOMIC CONDITIONS	CORPORATE REPUTATION; PUBLIC AFFAIRS/ GOVERNMENT RELATIONS; DIGITAL/ONLINE COMMUNICATIONS
SLOVENIA	CHAMBER OF PUBLIC RELATIONS ZOJ	9	40%	CONSUMER PRODUCTS, TECHNOLOGY, FINANCIAL AND PROFESSIONAL SERVICES	LACK OF CLIENT UNDERSTANDING OF PR; GENERAL ECONOMIC CONDITIONS; CLIENTS TOO FOCUSED ON SHORT-TERM	CORPORATE REPUTATION; SOCIAL RESPONSIBILITY; DIGITAL/ONLINE COMMUNICATIONS
SOUTH AFRICA	PUBLIC RELATIONS CONSULTANCY CHAPTER FORMED BY PRISA	43	10%	CONSUMER PRODUCTS, HEALTHCARE, TECHNOLOGY	STAFF RECRUITMENT; COMPETITION FROM OTHER MARKETING DISCIPLINES; GENERAL ECONOMIC CONDITIONS	CORPORATE REPUTATION; EMPLOYEE COMMUNICATIONS; DIGITAL/ ONLINE COMMUNICATIONS
SPAIN	ASSOCIATION OF PUBLIC RELATIONS AND COMMUNICATIONS CONSULTANCIES (ADECEC)	22	50%	CONSUMER PRODUCTS, PUBLIC SECTOR	COMPETITION FROM OTHER MARKETING DISCIPLINES; GENERAL ECONOMIC CONDITIONS; CLIENTS UNWILLING TO COMMIT SUFFICIENT FUNDS	CORPORATE REPUTATION; PUBLIC AFFAIRS/ GOVERNMENT RELATIONS; DIGITAL/ONLINE COMMUNICATIONS
SWEDEN	THE ASSOCIATION OF PUBLIC RELATIONS CONSULTANCIES IN SWEDEN, PRECIS	36	75%	FOOD AND BEVERAGE, FINANCIAL AND PROFESSIONAL SERVICES, PUBLIC SECTOR	STAFF RECRUITMENT; COMPETITION FROM OTHER PROFESSIONAL SERVICE FIRMS; LACK OF CLIENT UNDERSTANDING OF PR	CORPORATE REPUTATION; PUBLIC AFFAIRS/ GOVERNMENT RELATIONS; DIGITAL/ONLINE COMMUNICATIONS

LOCAL MARKETS

Continued

COUNTRY	TRADE ASSOCIATION	NUMBER OF MEMBER FIRMS	ESTIMATED % OF TOTAL MARKET	BIGGEST PR PRACTICE AREAS BY REVENUE	BIGGEST CHALLENGE AREAS FOR PR FIRMS	BIGGEST PREDICTED AREAS OF GROWTH
SWITZERLAND	ASSOCIATION OF PR AGENCIES IN SWITZERLAND (BPRA)	27	65%	CONSUMER PRODUCTS, TECHNOLOGY, FINANCIAL AND PROFESSIONAL SERVICES	COMPETITION FROM OTHER MARKETING DISCIPLINES; FINANCIAL PRESSURE TO MEET PROFIT/MARGIN TARGETS; GENERAL ECONOMIC CONDITIONS	CORPORATE REPUTATION; MARKETING COMMUNICATIONS; PUBLIC AFFAIRS/GOVERNMENT RELATIONS
TURKEY	COMMUNICATIONS CONSULTANCY COMPANIES ASSOCIATION - IDA	22	60%	CONSUMER PRODUCTS, TECHNOLOGY, FINANCIAL AND PROFESSIONAL SERVICES	FINANCIAL PRESSURE TO MEET PROFIT/MARGIN TARGETS; CLIENTS TOO FOCUSED ON SHORT-TERM; MEDIA HOSTILITY TO PR	CORPORATE REPUTATION; MARKETING COMMUNICATIONS; DIGITAL/ ONLINE COMMUNICATIONS
UNITED KINGDOM	PUBLIC RELATIONS CONSULTANTS ASSOCIATION (PRCA)	350	75%	CONSUMER PRODUCTS, HEALTHCARE, TECHNOLOGY	COMPETITION FOR CLIENTS FROM OTHER PR FIRMS; COMPETITION FROM OTHER MARKETING DISCIPLINES; GENERAL ECONOMIC CONDITIONS	MARKETING COMMUNICATIONS; PUBLIC AFFAIRS/GOVERNMENT RELATIONS; DIGITAL/ONLINE COMMUNICATIONS
UNITED STATES	COUNCIL OF PUBLIC RELATIONS FIRMS (CPRF)	110	75%	CONSUMER PRODUCTS, HEALTHCARE, TECHNOLOGY	STAFF RECRUITMENT; STAFF RETENTION; CLIENTS TOO FOCUSED ON SHORT-TERM	CORPORATE REPUTATION; MARKETING COMMUNICATIONS; DIGITAL/ ONLINE COMMUNICATIONS

ADVERT

