



#WorldPRReport



WORLD PR REPORT

2016

Produced by PRWeek and the International
Communications Consultancy Organisation



WORLD PR REPORT 2016

Produced by PRWeek and ICCO
Research partner: Question & Retain

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Acting Production Editor Beth Coombs

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ICCO is the global voice of public relations consultancies, with membership comprising national trade associations across 48 countries, as well as networks and agencies in Europe, Africa, Asia, the Middle East, the Americas, and Australasia. Collectively these associations represent more than 2,500 PR firms.



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A global gauge of tomorrow's trends

We are very proud to present the *World PR Report 2016*; the best, and most contemporary, guide in existence to the PR industry across the globe. It has been produced by *PRWeek*, the pre-eminent source of news and analysis of the sector, and the International Communications Consultancy Organisation (ICCO), the voice of PR consultancies around the world.

As well as providing the definitive ranking of the world's top 100 PR consultancies and further listings of local agencies, the *World PR Report 2016* has asked this vast network of PR firms about the recent trends in their business, along with their forecasts for the year ahead.

The following pages weave an intricate and intriguing tapestry of this fast-expanding sector, pinpointing where business is coming from, and likely to come from, in the various regions of the globe.

We also sought the views of the most senior practitioners in the industry, from each region, to build a qualitative picture of life on the ground.

As a seasoned observer of international public relations, I was struck by the consistency in response, regardless of geography. Social media are transforming this business everywhere, blurring the boundaries with other marketing communications disciplines; providing rich new seams of business.

But technological innovation is not only transforming the way organisations communicate, it is changing the way we all behave every day, meaning that technology also remains the fastest-growing industry sector for consultancy work.

The other hot growth sector over the past year – indeed for the past decade – is healthcare, as longevity increases and nation states, often in partnership with the private sector, strive to provide the sophisticated levels of care their populations rightly demand.

With public affairs and corporate reputation continuing to grow,

not least from organisations in the aforementioned sectors, there is massive potential here for consultancies of almost all specialisms.

Anyway, we hope you will find the *World PR Report 2016* a useful and easy guide to the global PR sector. We look forward to the next year, and revisiting these rankings and indicators in a year's time to gauge progress.

Danny Rogers
Editor-in-Chief, *PRWeek*



“There is big potential here for consultancies of almost all specialisms”

Bright and getting brighter - the future of PR

The ICCO and PRWeek World PR Report is the definitive analysis of where the global PR and comms industry stands today; how it has been performing over the past year; and what it predicts will happen in the next few. Drawing on the breadth and depth of ICCO's membership – 37 national associations, operating in 48 countries, and representing more than 2,500 agencies – it is a vital tool in understanding our industry.

What are the headlines?

Agency heads are optimistic. On a scale of 1-10, there is a global average of exactly 7. The most optimistic markets are the UK (8.1), and the Middle East (8.0); the least are Latin America (5.9), and Africa (6.0).

And they are expecting an increase in profitability, with a score of 6.2. Leading the pack is North America (7.2), followed by the UK at precisely 7. At the other end, we have Latin America again (5.2), and Western Europe (5.7).

Both of those findings deserve celebration, given the at times tempestuous and uncertain state of the world economy. What is driving this performance? I would highlight three factors, which we have seen for the past few years now, and which are remarkably constant region-by-region.

The first is chief executives taking corporate reputation seriously. Quite simply, the business community around the world is

more aware than ever before of the fact that their most important asset is their reputation.

The second is that marketers are taking their spend away from other disciplines, and diverting it into more effective mediums of PR and comms. And the third is that clients are increasingly asking public relations firms to provide non-traditional services.

Those last two points amount to one incontrovertible trend – in an increasingly integrated marketing world, PR's nimbleness, insight, and creativity is beating the competition.

What have been the main practice areas of growth?

Four stand out head and shoulders above the rest – digital comms; corporate reputation; marcomms; and public affairs. And when agency heads are asked to predict which sectors will drive growth over the coming years, they name exactly those four again.

Obviously, there are variations by region, reflecting different local priorities, and different levels of market maturity. But the message is clear – those areas have driven growth in the past, and are set to do so again in the future. Looked at by sector, we again see four key areas of growth now and in the future – technology; consumer; healthcare; and financial and professional services. And underpinning all of this behaviour is the crucial role PR and comms agencies now play in social media and community management, and in

creating content across the whole range of media – areas where wise agencies are making significant investment. So far, so encouraging.

But what of the challenges faced by the industry?

It will come as no surprise that two perennial ones are right up there – meeting profit margins, and handling general economic conditions. The first is a symptom of PR's inability to charge appropriately for the value it delivers – former ICCO chairman Richard Houghton's regular lament that 'Fridays are free'; the second is something over which we have no control.

The area where we certainly have the ability to make a difference is talent. In six of the nine world regions, it tops the bill as the key challenge. In fact, only in Asia does talent not rank in the top three. Although our industry continues to power ahead, its growth is being hindered by our failure to attract and then to retain the very best.

Within that challenge are two specific areas of concern: hiring senior staff, and attracting people from non-traditional background. The latter is of particular concern to ICCO. If agencies keep on recruiting the same type of person, with the same type of background, they are automatically excluding themselves from large parts of the market. The more varied teams are, the abler they are to deliver excellent services to the widest possible range of clients.



I would make two final observations:

First, and it is a point made by several contributors from different regions, the industry has reached a happy place of maturity. Social media and content may be the biggest areas of growth, but there is still room for the older skills of PR and comms, such as media relations. And that place exists in established and developing markets. There is, quite simply, a home for all branches of our profession.

Second, what a brilliant time to be in this industry. Even in difficult economic circumstances, PR and comms agencies are profitable, growing, and optimistic.

How would I sum up the future? Bright. And getting brighter.

Francis Ingham
Chief Executive, ICCO

“In an integrated marketing world, PR's nimbleness, insight, and creativity is beating the competition”

A talent-driven future



Colin Byrne
Weber Shandwick
CEO, UK & EMEA

While Brexit is still settling down as a business and consumer confidence issue, the latest ICCO and PRWeek World PR Report suggests 2015 was another strong year for the growth and evolution of our industry in the UK.

Certainly, my own business saw strong headline growth driven by double-digit increases in digital, consumer and healthcare revenues. And we were not alone.

With the continued disruption of the media industry and the knock-on effect on traditional advertising, the door is open to us to take to clients the transformational talent and thinking, not traditionally associated with PR.

But that requires being open-minded to dramatic change in everything from our business models to our talent acquisition. On the latter, I am looking at three things – more creative and strategic talent from advertising and marketing firms, more trainee-level intake with a business background, and more diversity, particularly regarding social and racial background and more women in leadership roles.

The industry should also call time on talk of the digital PR versus non-digital PR divide and start to think properly about integrated

comms. The real lesson from Cannes in recent years is not about ad agencies winning PR Lions but about great integrated work driven by insights and great creative. Media relations – in its widest sense encapsulating social media, influencers and so on as well as print and broadcast media relations (given the integrated approaches of media from *The Guardian* to Sky to the *Daily Mail*, these delineations themselves become meaningless) – are a core part of any integrated campaign along with the paid, owned and shared work we are already doing.

The driver of any successful integrated campaign is not mastery of channels, but of insight-driven creative ideas. That is exactly where we need to focus our talent acquisition.

Macro-economic issues including economic downturns in BRIC and other emerging markets, security and political issues, the uncertainties around the US election and, yes, Brexit with its associated recession warnings, are challenges for us and our clients. But the more we innovate and transform our work, pivoting to chief marketing officers and their budgets, the more we attract top talent from advertising, marketing and beyond, and the more we own the creative idea as opposed to earned-media activation of someone else's, the healthier we will be.

“The door is open to us to use talent and thinking not usually associated with PR”





Regeneration game



Lynne Anne Davis
FleishmanHillard
President,
Asia-Pacific

We live in an era of epic global disruption. In a region as fast-evolving as Asia-Pacific, constant change is not a new norm. Sharp or steady, market flux persists, with 80 per cent of global GDP growth expected to come from emerging markets – led by key Asia economies – in the next two decades.

As experts in helping clients seize these growth opportunities, Asia-Pacific's PR industry itself sustains a high-growth mode. Unfortunately, the realities of scaling to the greatest possible heights are more difficult than they seem.

Ask anyone running a business in Asia what keeps them awake at night. Most will say it is about finding, keeping and growing great people. The single biggest threat to maximising growth potential is the quality and engagement of talent.

While most global respondents to the ICCO survey (82 per cent) cannibalise rival agencies for recruitment, the number one hiring source cited by Asia-Pacific respondents (excluding Australia and New Zealand) is in-house communication departments, followed by journalism and graduate programmes. The industry needs to look further afield and get more creative in how it attacks persisting talent limitations.

PR's massive transformation as an integrated, socially-centric industry was enabled by the introduction of non-traditional roles and expertise from other industries. That must never stop in order to continuously innovate, expand influence and supply the rising demand for PR services – especially in Asia, where local companies are aggressively disrupting categories, exporting brands abroad and creating new spaces.

Likewise, demand for crisis management and public affairs work is rising rapidly in a region as issues-rich as Asia.

Agencies with the consulting skills to advise on high-stakes, complex business challenges on many different levels are best equipped to cater to the burgeoning generation of global leaders from Asia. Therefore, experience in legal, digital, government, non-governmental organisations, management and HR consulting, for example, all apply.

The dynamism, diversity and professional enrichment of agency life are alluring in an industry blessed with an abundance of growth. Every player in it should be actively promoting the attributes of PR as a smart career choice as broadly as possible. The future belongs to agencies that grow a talent trove from the inside and out.

“The future belongs to agencies that grow a talent trove from the inside and out”

WORLD PR REPORT PRWeek's Top 100 Global PR Agencies

Rank	Agency	2015 global revenue (000s)	2014 global revenue (000s)	% chng	2015 global staff	2014 global staff	% chng	2015 revenue per staff	2014 revenue per staff	% chng	HQ
1	Edelman	\$854,576	\$812,300	5	5,849	5,455	7	\$146,106	\$148,909	-2	Chicago
2	Weber Shandwick**	\$735,000	\$680,000	8	4,300	4,000	8	\$170,930	\$170,000	1	New York
3	FleishmanHillard**	\$570,000	\$600,000	-5	2,750	2,700	2	\$207,273	\$222,222	-7	St Louis
4	Ketchum**	\$530,000	\$510,000	4	2,575	2,500	3	\$205,825	\$204,000	1	New York
5	MSLGROUP*	\$495,000	\$485,000	2	3,025	3,016	0	\$163,636	\$160,809	2	Paris
6	Burson-Marsteller**	\$450,000	\$450,000	0	2,500	2,300	9	\$180,000	\$195,652	-8	New York
7	Hill+Knowlton Strategies**	\$380,000	\$380,000	0	2,700	2,500	8	\$140,741	\$152,000	-7	New York
8	Ogilvy Public Relations*	\$353,000	\$300,000	18	2,550	2,500	2	\$138,431	\$120,000	15	New York
9	Brunswick*	\$260,000	\$230,000	13	980	900	9	\$265,306	\$255,556	4	London
10	BlueFocus	\$245,056	\$179,214	37	5,622	5,000	12	\$43,589	\$35,843	22	Beijing
11	Havas PR**	\$218,000	\$208,000	5	1,200	1,200	0	\$181,667	\$173,333	5	New York
12	Cohn & Wolfe**	\$195,000	\$175,000	11	1,250	1,200	4	\$156,000	\$145,833	7	New York
13	Golin*	\$192,000	\$178,000	8	1,400	1,200	17	\$137,143	\$148,333	-8	Chicago
14	FTI Consulting	\$189,974	\$189,367	0	599	566	6	\$317,152	\$334,571	-5	New York
15	Media Consulta International	\$165,236	\$189,881	-13	808	684	18	\$204,500	\$277,604	-26	Berlin
16	Porter Novelli**	\$153,000	\$145,740	5	720	686	5	\$212,500	\$212,449	0	New York
17	ICF Olson	\$142,808	\$141,809	1	735	528	39	\$194,297	\$268,577	-28	Fairfax, VA
18	APCO Worldwide	\$119,858	\$118,1123	1	680	635	7	\$176,262	\$186,004	-5	Washington, DC
19	Finsbury*	\$110,000	\$100,000	10	220	206	7	\$500,000	\$485,437	3	London
20	Huntsworth Health***	\$110,000	\$96,000	14	-	-	-	-	-	-	London
21	WE Communications	\$99,083	\$106,676	-7	666	705	-6	\$148,773	\$151,313	-2	Bellevue, WA
22	inVentiv Health PR Group*	\$99,000	\$90,000	10	368	344	7	\$269,022	\$261,628	3	New York
23	Sunny Side Up	\$98,500	\$118,290	-17	196	186	5	\$502,551	\$635,968	-21	Tokyo
24	Grayling**	\$96,595	\$125,000	-23	762	950	-20	\$126,765	\$131,579	-4	London
25	W2O Group	\$95,505	\$82,625	16	427	402	6	\$223,665	\$205,535	9	San Francisco

*Indicates 2015 and 2014 revenue figures are PRWeek estimates owing to the Sarbanes-Oxley Act (2002). Staff numbers were provided by the agency.

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Rank	Agency	2015 global revenue (000s)	2014 global revenue (000s)	% chng	2015 global staff	2014 global staff	% chng	2015 revenue per staff	2014 revenue per staff	% chng	HQ
26	Vector	\$82,000	\$67,000	22	465	354	31	\$176,344	\$189,266	-7	Tokyo
27	FischerAppelt	\$78,000	\$73,600	6	395	360	10	\$197,468	\$204,444	-3	Hamburg
28	Ruder Finn	\$74,000	\$73,891	0	603	565	7	\$122,720	\$130,781	-6	New York
29	Finn Partners	\$71,6434	\$52,797	36	476	370	29	\$150,512	\$142,695	5	New York
30	Lewis	\$68,585	\$61,470	12	568	490	16	\$120,748	\$125,449	-4	London
31	PMK-BNC*	\$65,000	\$56,000	16	304	258	18	\$213,816	\$217,054	-1	Los Angeles
32	FSB Comunicação	\$63,026	\$85,876	-27	704	655	7	\$89,525	\$131,109	-32	Rio de Janeiro
33	Textio	\$62,650	\$57,306	9	602	549	10	\$104,070	\$104,383	0	New York
34	Res Publica	\$60,007	\$66,548	-10	431	418	3	\$139,227	\$159,205	-13	Montreal
35	Hopscotch Groupe	\$59,807	\$71,018	-16	550	542	1	\$108,741	\$131,029	-17	Paris
36	MWWPR	\$58,000	\$56,715	2	228	248	-8	\$254,386	\$228,690	11	New York
37	ICR	\$56,209	\$51,663	9	162	130	25	\$346,968	\$397,411	-13	New York
38	Bell Pottinger	\$53,231	\$54,293	-2	266	278	-4	\$200,117	\$195,300	2	London
39	Instinctif Partners	\$50,640	\$48,505	4	450	372	21	\$112,532	\$130,390	-14	London
40	Kreab	\$49,932	\$63,959	-22	450	400	13	\$110,960	\$159,896	-31	Stockholm
41	DKC	\$46,950	\$41,500	13	239	199	20	\$196,444	\$208,543	-6	New York
42	Newlink	\$46,500	\$44,000	6	300	350	-14	\$155,000	\$125,714	23	Miami
43	Marina Maher Comms*	\$45,000	\$40,000	13	185	163	13	\$243,243	\$245,399	-1	New York
44	PRAP Japan	\$44,888	\$51,597	-13	275	259	6	\$163,230	\$199,218	-18	Tokyo
45	Freuds	\$44,203	\$46,774	-5	223	213	5	\$198,219	\$219,597	-10	London
46	Dentsu Public Relations*	\$44,000	\$42,000	5	253	253	0	\$173,913	\$166,008	5	Tokyo
47	Allison+Partners	\$43,409	\$32,730	33	300	230	30	\$144,697	\$142,304	2	San Francisco
48	SERMO Communications	\$41,495	\$40,486	2	488	521	-6	\$85,031	\$77,709	9	London
49	Four Communications Group	\$39,958	\$22,345	79	229	147	56	\$174,491	\$152,008	15	London
50	Zeno Group	\$39,763	\$32,672	22	317	276	15	\$125,434	\$118,380	6	New York

***Indicates 2015 and 2014 revenue are PRWeek estimates owing to the Sarbanes-Oxley Act (2002) and agency did not supply staff figures.

For full methodology and notes, see PRWeek's Global Agency Business Report 2016 at prweek.com/us

WORLD PR REPORT PRWeek's Top 100 Global PR Agencies

Rank	Agency	2015 global revenue (ooos)	2014 global revenue (ooos)	% chng	2015 global staff	2014 global staff	% chng	2015 revenue per staff	2014 revenue per staff	% chng	HQ
51	Hering Schuppener	\$38,392	\$42,816	-10	180	180	0	\$213,290	\$237,869	-10	Düsseldorf
52	DeVries Global**	\$37,000	\$45,000	-18	233	243	-4	\$158,798	\$185,185	-14	New York
53	Brodeur Partners**	\$35,000	\$32,000	9	250	245	2	\$140,000	\$130,612	7	Boston
54	PadillaCRT	\$34,814	\$31,625	10	205	185	11	\$169,823	\$170,946	-1	Minneapolis
55	Portland	\$34,007	\$35,441	-4	120	100	20	\$283,391	\$354,406	-20	London
56	Llorente & Cuenca	\$33,335	\$32,458	3	482	350	38	\$69,160	\$92,738	-25	Madrid
57	Kyodo Public Relations	\$32,540	\$35,668	-9	224	227	-1	\$145,269	\$157,128	-8	Tokyo
58	Global Strategy Group	\$31,000	\$32,378	-4	87	76	14	\$356,322	\$426,026	-16	New York
59	Citigate Dewe Rogerson**	\$30,600	\$38,000	-19	176	125	41	\$173,864	\$304,000	-43	London
60	Newgate Communications	\$29,827	\$21,457	39	142	-	-	\$210,052	-	-	London
61	Racepoint Global	\$29,529	\$27,280	8	168	164	2	\$175,770	\$166,339	6	Boston
62	Coyne Public Relations	\$27,300	\$23,010	19	190	155	23	\$143,684	\$148,452	-3	Parsippany, NJ
63	SEC	\$27,261	\$20,015	36	170	155	10	\$160,358	\$129,129	24	Milan
64	MHP Communications	\$27,133	\$27,213	0	168	168	0	\$161,504	\$161,985	0	London
65	The OutCast Agency	\$26,000	\$25,000	4	114	99	15	\$228,070	\$252,525	-10	San Francisco
66	M Booth	\$25,546	\$18,848	36	141	102	38	\$181,181	\$184,781	-2	New York
67	G&S Business Comms	\$25,013	\$25,438	-2	142	140	1	\$176,146	\$181,701	-3	New York
68	SPN Communications	\$24,784	\$23,192	7	225	-	-	\$110,150	-	-	Moscow
69	Prosek Partners	\$24,429	\$20,300	20	102	86	19	\$239,500	\$236,047	1	New York
70	Hotwire	\$22,735	\$24,856	-9	169	154	10	\$134,529	\$161,403	-17	London
71	Taylor	\$22,380	\$21,750	3	105	108	-3	\$213,143	\$201,389	6	New York
72	Strategic PR Group	\$21,808	\$19,700	11	282	280	1	\$77,332	\$70,357	10	Hong Kong
73	5W Public Relations	\$21,467	\$18,961	13	133	112	19	\$161,410	\$169,295	-5	New York
74	French West Vaughan	\$21,166	\$18,754	13	96	87	10	\$220,481	\$215,560	2	Raleigh, NC
75	Hunter Public Relations*	\$21,000	\$20,500	2	111	107	4	\$189,189	\$191,589	-1	New York

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76	Peppercomm	\$20,647	\$18,808	10	106	106	0	\$194,787	\$177,430	10	New York
77	Fahlgren Mortine	\$20,554	\$18,616	10	119	104	14	\$172,725	\$179,005	-4	Columbus, OH
78	Shift Communications	\$20,426	\$18,445	11	135	135	0	\$151,305	\$136,629	11	Newton, MA
79	Barabino & Partners	\$20,054	\$20,044	0	100	98	2	\$200,538	\$204,534	-2	Milan
80	Cone Communications**	\$20,000	\$19,800	1	80	90	-11	\$250,000	\$220,000	14	Boston
81	Levick	\$19,586	\$17,232	14	73	64	14	\$268,307	\$269,244	0	Washington, DC
82	The Red Consultancy**	\$19,564	\$20,297	-4	124	132	-6	\$157,774	\$153,763	3	London
83	Spong*	\$19,500	\$17,300	13	70	60	17	\$278,571	\$288,333	-3	Minneapolis
84	Farner Consulting	\$18,512	\$18,013	3	78	74	5	\$237,333	\$243,419	-3	Zurich
85	Jackson Spalding	\$18,173	\$16,246	12	122	115	6	\$148,956	\$141,267	5	Atlanta
86	Steinreich Comms Group	\$17,798	-	-	58	-	-	\$306,857	-	-	Fort Lee, NJ
87	Brands2Life	\$17,670	\$16,070	10	123	106	16	\$143,659	\$151,606	-5	London
88	The Communications Store	\$17,364	\$17,452	-1	119	107	11	\$145,917	\$163,099	-11	London
89	Kivvit	\$16,950	\$12,488	36	61	49	24	\$277,869	\$254,858	9	Chicago
90	Lansons	\$16,726	\$17,932	-7	111	100	11	\$150,685	\$179,319	-16	London
91	LaunchSquad	\$16,221	\$14,063	15	111	106	5	\$146,135	\$132,668	10	San Francisco
92	Marcus Thomas	\$16,083	\$20,820	-23	125	136	-8	\$128,666	\$153,088	-16	Cleveland
93	ICF Mostra	\$16,000	\$23,500	-32	159	136	17	\$100,629	\$172,794	-42	Brussels
94	Mitchell	\$15,993	\$15,900	1	79	75	5	\$202,443	\$212,000	-5	Fayetteville, AR
95	M&C Saatchi Sport & Ent	\$15,912	\$14,144	12	111	82	35	\$143,349	\$172,487	-17	London
96	Achtung	\$15,613	\$15,770	-1	125	108	16	\$124,905	\$146,021	-14	Hamburg
97	Rasky Baerlein Strat Comms	\$15,504	\$13,190	18	51	50	2	\$304,009	\$263,799	15	Boston
98	Imagination	\$15,488	\$14,823	4	92	88	5	\$168,352	\$168,440	0	Chicago
99	TRACCS	\$15,200	\$14,600	4	224	199	13	\$67,857	\$73,367	-8	Dubai
100	Häberlein & Mauerer	\$14,900	\$17,400	-14	171	168	2	\$87,135	\$103,571	-16	Munich

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For full methodology and notes, see PRWeek's Global Agency Business Report 2016 at prweek.com/us



Coming of age



Pascal Beucler
MSLGROUP
Senior
Vice-President
and Chief
Strategy Officer

The dramatic disruptions created by the convergence of technologies and the empowerment of people equally affect the whole European continent.

But while the comms industry feels upside down these days, the PR world has more reason to embrace change than to fear it.

On the corporate side of our business as well as on the consumer side, we are comfortable providing our clients with the following:

- First-class research and data
- In-depth analysis turned into strategic advice
- Branding and content creation
- Public affairs, issues management and crisis comms
- Storytelling and experiential/events comms off- and online
- Media relations, influencer engagement and so on.

Another trend in Europe is the need for more integration, particularly for big, global clients. Wasting time and money from having too many people from different networks around the table is something they hate.

They say they want one team, as diverse as possible but belonging to the same profit and loss and led by one single, global manager. Such alignment makes for better decisions.

More broadly, Eastern and Western Europe are converging, and from a PR standpoint, the following trends can be seen:

- There is reasonable optimism in terms of growth (already visible in last year's study).
- PR consulting is finally developing in the Eastern part of the region. After years of basic brand PR and stunts, local agencies are becoming more sophisticated services.
- There is still a limited amount of networks operating across the borders of Central and Eastern Europe.
- Strategic comms, public affairs and lobbying are growing in importance, becoming new areas of consulting for many agencies as the institutional landscape becomes more complex.
- More sophisticated services are required, due to a more and more demanding business context: the role and status of PR is getting bigger in all industries.
- There is no doubt that creativity is an asset today, as standards improve and clients are watching their agency's performance in terms of international awards.
- Digital is all over the place. There is still a lot to do around integration. Also, smart data analysis and measurement are still key challenges for PR agencies in Europe.

All in all, the years to come should be years of profitable growth for the PR industry in Europe at large.

“A trend we can see everywhere in Europe is the need for more integration”

Grassroots growth



Loretta Ahmed Grayling
CEO Middle East,
Turkey & Africa and
Chair, PRCA MENA

The Middle East and Africa PR scene continues to thrive, albeit at a slower pace than in previous years.

With oil prices languishing, government budget deficits and downward pressure on budgets continue.

The sector is diverse – ranging from small manager-owned boutiques to big global networks. With more than 100 agencies in the UAE alone, the pricing element of pitching is increasingly dominating decision-making. However, the nature of our work is changing. Most agencies are growing their offerings and their talent mix. Video and visual-data content features heavily in all campaigns and the right talent to deliver relevant campaigns is more often appearing alongside the 'traditional' PR team as agencies work to offer integrated work to clients.

Less risk averse than many parts of the world, the Middle East is coming of age and it is good to see world-class work emanating from the region and being recognised in global awards.

Talent searches are a continual challenge for agency heads. More local talent is required and getting the mix of expat and local expertise right is key. With expats accounting for more than 85 per cent of the population in markets such as the UAE and Qatar this part

of agency management is never easy. Graduate recruitment is low and agencies are focusing on developing their own talent in a concerted effort to retain their top staff.

As agencies in South Africa expand, their networks and the global networks are all planting their flags through a combination of start-ups and acquisitions. Across markets such as Kenya, Nigeria and Angola there is a sense of excitement as clients in the public and private sector ask local agencies with local expertise to meet their comms needs.

In Africa in particular, comms professionals are able to achieve CEO-level client access at a far greater frequency than in other markets. While this comes with a far greater ability to influence decision-making, it also creates the need for strategic communicators to feature heavily in the team mix – a challenge for agency heads looking to field local teams.

With the downturn in the global economy, more global clients are eyeing the Middle East and Africa as an important growth area – and this is matched by international candidates circulating their impressive resumes to agency heads across the region. Tempting though such candidates may be, they are not the solution for future growth and the best agency strategies are now focused around attracting and upskilling local talent.

“The best agency strategies are now focused around upskilling local talent”



Plotting a path to growth

Our survey of global PR leaders reveals where they think future growth opportunities lie

This section of the report reveals the performance and mood of the PR market based on the opinion of practitioners globally, analysed by geographical region.

The purpose of this research is to establish an overview of the market conditions that the global PR industry faces heading into the second half of the decade.

Consideration is given to the services driving growth across the industry and in which areas and sectors PR firms are expecting to focus their investment efforts in the immediate future. Crucially, the results also show where difficulties may be found in implementing their strategies.

Revenues

The research results also give insight into improved revenue streams and expected growth in the future, and where in the market it is anticipated growth will come from.

Talent is critical to the industry, so the research seeks to reveal where agencies are sourcing talent, what challenges they face with their recruitment strategies and which skills firms see as key to success in the future.

Finally, the overall optimism of industry specialists is gauged per region, giving a fascinating overview of the mood and beliefs in these different markets.

Methodology

ICCO circulated online and paper surveys between 15 May and 15 July 2016 to all national member associations, representing 48 countries and more than 2,500 PR firms. The convenience sampling of PR practitioners does not provide an exact account of the activities in the different markets, but does provide a useful insight into the observations, beliefs, attitudes and actions of PR professionals.

GROWTH & OPPORTUNITIES

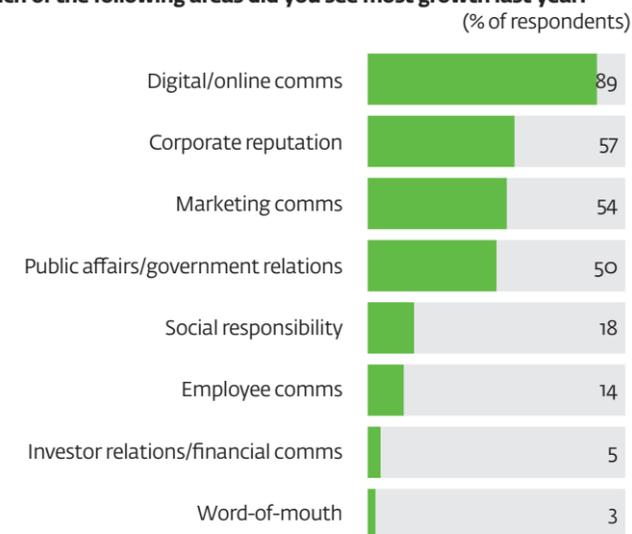
In which areas did you see the most growth last year?



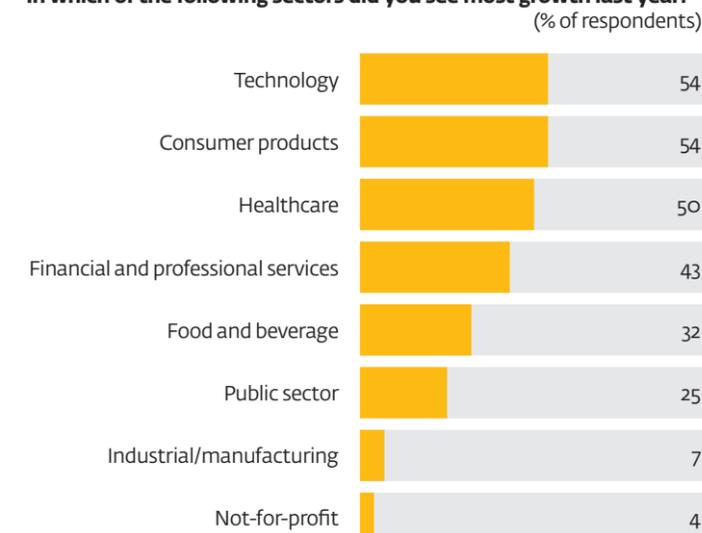
In which of the following areas do you expect an increase in PR firms' investment this year?



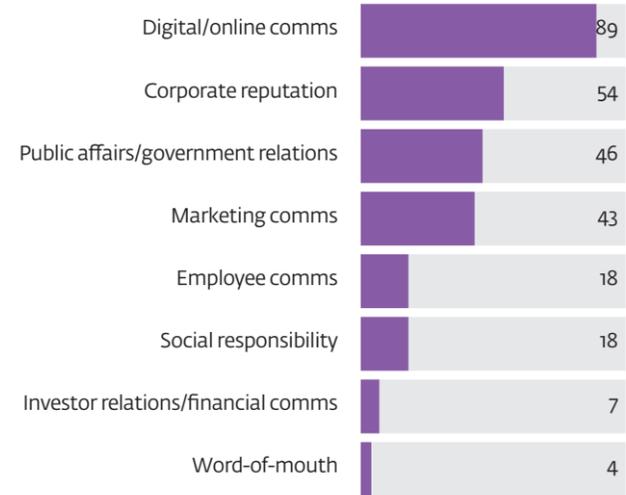
In which of the following areas did you see most growth last year?



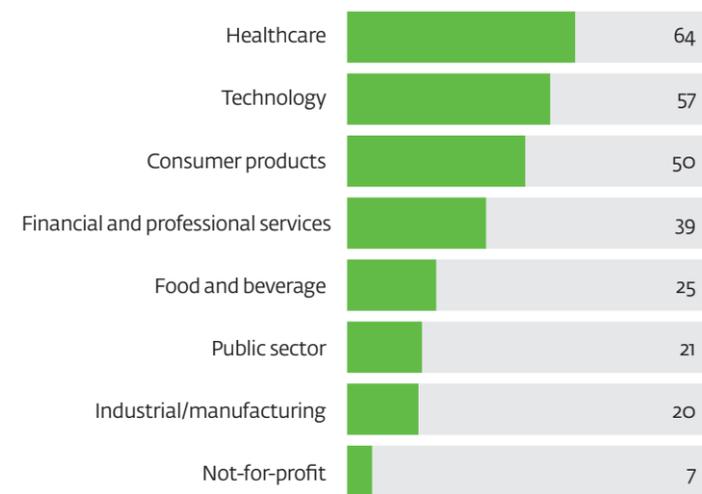
In which of the following sectors did you see most growth last year?



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

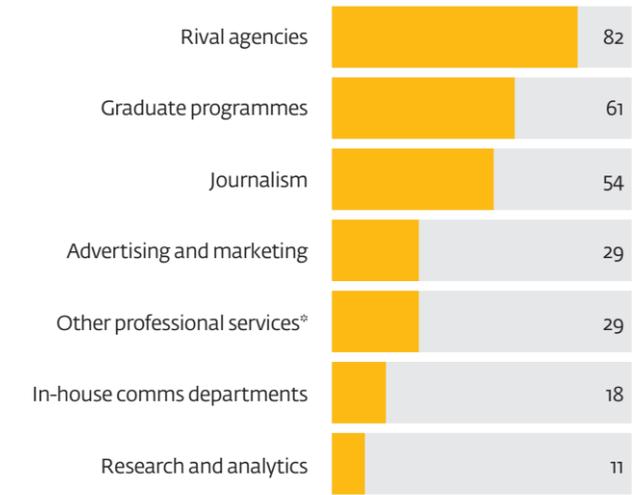


In which of the following sectors do you expect to see most growth over the next few years? (% of respondents)



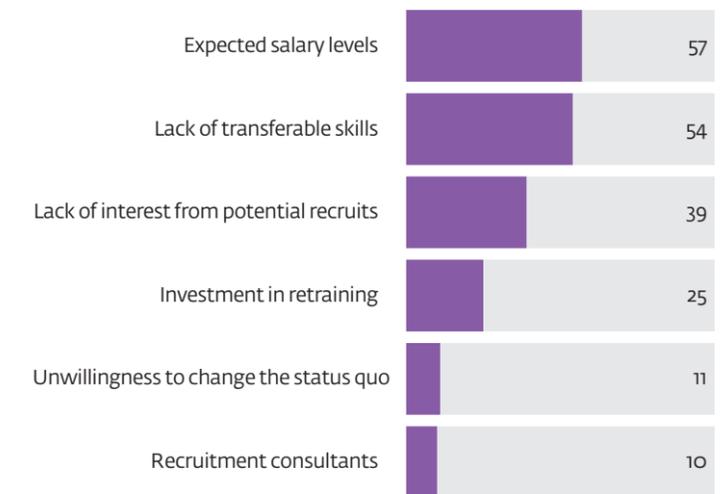
TALENT & CHALLENGES

Where are agencies in your market likely to source talent from this year? (% of respondents)



*such as law or management consultancy

What stops the PR industry in your market from sourcing talent from outside the industry? (% of respondents)



Africa

What is the biggest challenge PR agencies in your market face when it comes to their talent strategy? (% of respondents)



Looking at the next decade, which skills set will be most relevant for PR executives in your market? (% of respondents)



In which areas did you see the most growth last year? (top three choices per region)



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



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



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



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



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



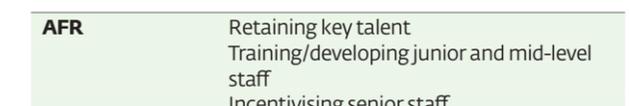
Where are agencies in your market likely to source talent from this year?



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



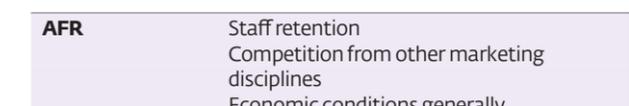
What is the biggest challenge PR agencies in your market face when it comes to their talent strategy?



Looking at the next decade, which skills set will be most relevant for PR executives in your market?



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



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



Asia

In which areas did you see the most growth last year?
(top three choices per region)

ASIA	Social media community management Multimedia content creation Media relations
-------------	---

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

ASIA	Social media community management Digital build and production Measurement and analytics
-------------	--

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

ASIA	Digital/online comms Public affairs/government relations Marketing comms
-------------	--

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

ASIA	Technology Healthcare Industrial/manufacturing
-------------	--

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

ASIA	Digital/online comms Marketing comms Public affairs/government relations
-------------	--

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

ASIA	Digital/online comms Marketing comms Public affairs/government relations
-------------	--

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

ASIA	In-house comms departments Journalism Graduate programmes
-------------	---

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

ASIA	Expected salary levels Lack of transferable skills Investment in retraining
-------------	---

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

ASIA	Retaining key talent Training/developing junior and mid-level staff Finding people from non-traditional backgrounds
-------------	---

Looking at the next decade, which skills set will be most relevant for PR executives in your market?

ASIA	Social media community management Insight and planning Marketing and business development
-------------	---

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

ASIA	Economic conditions generally Financial pressure to meet profit/margin targets Clients unwilling to commit sufficient funds
-------------	---

Eastern Europe

In which areas did you see the most growth last year?
(top three choices per region)

E EU	Social media community management Multimedia content creation Digital build and production
-------------	--

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

E EU	Technology Consumer products Financial and professional services
-------------	--

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

E EU	Digital/online comms Marketing comms Corporate reputation
-------------	---

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

E EU	Technology Consumer products Financial and professional services
-------------	--

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

E EU	Social media community management Multimedia content creation Digital build and production
-------------	--

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

E EU	Healthcare Technology Consumer products
-------------	---

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

E EU	Rival agencies Graduate programmes Journalism
-------------	---

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

E EU	Expected salary levels Lack of interest from potential recruits Lack of transferable skills
-------------	---

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

E EU	Retaining key talent Hiring senior staff Motivating younger executives
-------------	--

Looking at the next decade, which skills set will be most relevant for PR executives in your market?

E EU	Social media community management Creativity Measurement and analytics
-------------	--

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

E EU	Clients unwilling to commit sufficient funds Competition from other marketing disciplines Staff retention
-------------	---

Latin America

In which areas did you see the most growth last year?
(top three choices per region)

LAT	Social media community management Multimedia content creation Digital build and production
------------	--

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

LAT	Social media community management Multimedia content creation Creativity
------------	--

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

LAT	Digital/online comms Corporate reputation Marketing comms
------------	---

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

LAT	Consumer products Financial and professional services Food and beverage
------------	---

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

LAT	Digital/online comms Corporate reputation Public affairs/government relations
------------	---

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

LAT	Financial and professional services Public sector Industrial/manufacturing
------------	--

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

LAT	Rival agencies Advertising and marketing Other professional services
------------	--

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

LAT	Investment in retraining Lack of transferable skills Recruitment consultants
------------	--

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

LAT	Hiring senior staff Finding people from non-traditional backgrounds Retaining key talent
------------	--

Looking at the next decade, which skills set will be most relevant for PR executives in your market?

LAT	Multimedia content creation Creativity Measurement and analytics
------------	--

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

LAT	Economic conditions generally Competition from other marketing disciplines Staff retention
------------	--

Middle East

In which areas did you see the most growth last year?
(top three choices per region)

M EA	Social media community management Digital build and production Multimedia content creation
-------------	--

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

M EA	Multimedia content creation Measurement and analytics Marketing and business development
-------------	--

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

M EA	Digital/online comms Public affairs/government relations Social responsibility
-------------	--

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

M EA	Technology Consumer products Public sector
-------------	--

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

M EA	Digital/online comms Public affairs/government relations Word-of-mouth
-------------	--

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

M EA	Healthcare Technology Public sector
-------------	---

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

M EA	Rival agencies Graduate programmes Advertising and marketing
-------------	--

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

M EA	Investment in retraining Recruitment consultants Lack of interest from potential recruits
-------------	---

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

M EA	Finding people from non-traditional backgrounds Hiring senior staff Motivating younger executives
-------------	---

Looking at the next decade, which skills set will be most relevant for PR executives in your market?

M EA	Multimedia content creation Insight and planning Crisis counsel
-------------	---

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

M EA	Staff retention Staff recruitment Financial pressure to meet profit/margin targets
-------------	--

North America

In which areas did you see the most growth last year?
(top three choices per region)

NA	Multimedia content creation Social media community management Digital build and production
-----------	--

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

NA	Digital/online comms Marketing comms Clients unwilling to commit sufficient funds
-----------	---

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

NA	Digital/online comms Marketing comms Investor relations/financial comms
-----------	---

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

NA	Technology Consumer products Financial and professional services
-----------	--

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

NA	Digital/online comms Public affairs/government relations Marketing comms
-----------	--

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

NA	Technology Healthcare Consumer products
-----------	---

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

NA	Rival agencies Advertising and marketing Other professional services
-----------	--

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

NA	Expected salary levels Investment in retraining Unwillingness to change the status quo
-----------	--

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

NA	Training/developing junior and mid-level staff Retaining key talent Finding people from non-traditional backgrounds
-----------	---

Looking at the next decade, which skills set will be most relevant for PR executives in your market?

NA	Multimedia content creation Media relations Paid media
-----------	--

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

NA	Staff retention Staff recruitment Digital and new technologies
-----------	--

United Kingdom

In which areas did you see the most growth last year?
(top three choices per region)

UK	Digital build and production Multimedia content creation Research
-----------	---

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

UK	Digital build and production Marketing and business development Senior counsel
-----------	--

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

UK	Digital build and production Multimedia content creation Research
-----------	---

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

UK	Technology Healthcare Consumer products
-----------	---

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

UK	Digital/online comms Marketing comms Public affairs/government relations
-----------	--

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

UK	Healthcare Technology Financial and professional services
-----------	---

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

UK	Advertising and marketing Rival agencies Graduate programmes
-----------	--

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

UK	Expected salary levels Lack of transferable skills Investment in retraining
-----------	---

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

UK	Retaining key talent Finding people from non-traditional backgrounds Incentivising senior staff
-----------	---

Looking at the next decade, which skills set will be most relevant for PR executives in your market?

UK	Multimedia content creation Measurement and analytics Creativity
-----------	--

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

UK	Staff retention Staff recruitment Digital and new technologies
-----------	--

Australia & New Zealand

In which areas did you see the most growth last year?
(top three choices per region)

AUS NZ Digital build and production
Multimedia content creation
Creativity

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

AUS NZ Digital build and production
Multimedia content creation
Creativity

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

AUS NZ Digital/online comms
Public affairs/government relations
Social responsibility

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

AUS NZ Consumer products
Financial and professional services
Healthcare

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

AUS NZ Digital/online comms
Social responsibility
Public affairs/government relations

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

AUS NZ Healthcare
Financial and professional services
Consumer products

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

AUS NZ Rival agencies
Advertising and marketing
Journalism

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

AUS NZ Expected salary levels
Lack of transferable skills
Investment in retraining

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

AUS NZ Retaining key talent
Hiring senior staff
Hiring mid-level staff

Looking at the next decade, which skills set will be most relevant for PR executives in your market?

AUS NZ Multimedia content creation
Digital build and production
Social media community management

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

AUS NZ Staff retention
Staff recruitment
Competition from other marketing disciplines

Western Europe

In which areas did you see the most growth last year?
(top three choices per region)

W EU Rival agencies
Graduate programmes
Journalism

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

W EU Social media community management
Multimedia content creation
Digital build and production

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

W EU Multimedia content creation
Social media community management
Digital build and production

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

W EU Healthcare
Consumer products
Technology

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

W EU Digital/online comms
Public affairs/government relations
Corporate reputation

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

W EU Healthcare
Technology
Consumer products

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

W EU Rival agencies
Graduate programmes
Journalism

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

W EU Expected salary levels
Lack of transferable skills
Investment in retraining

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

W EU Retaining key talent
Finding people from non traditional backgrounds
Hiring senior staff

Looking at the next decade, which skills set will be most relevant for PR executives in your market?

W EU Social media community management
Multimedia content creation
Digital build and production

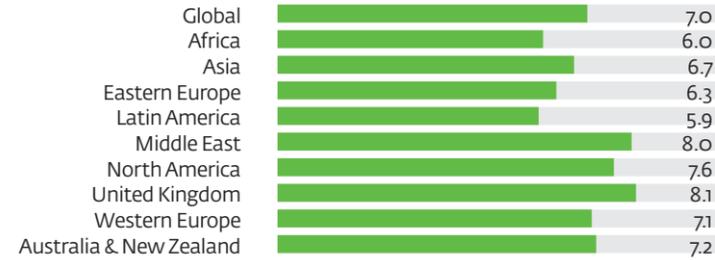
Which of the following issues do you believe to be the greatest challenges for PR firms in your market?

W EU Staff retention
Competition from other marketing disciplines
Economic conditions generally

OPTIMISM

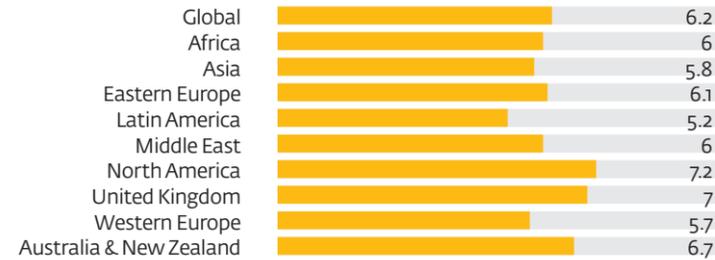
I am optimistic about the growth of the PR industry

Out of 10



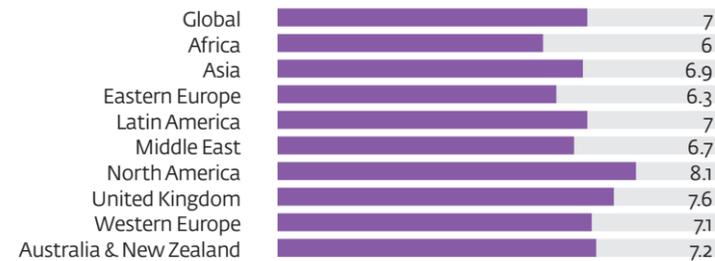
PROFITABILITY

I expect an increase in agency profitability this year



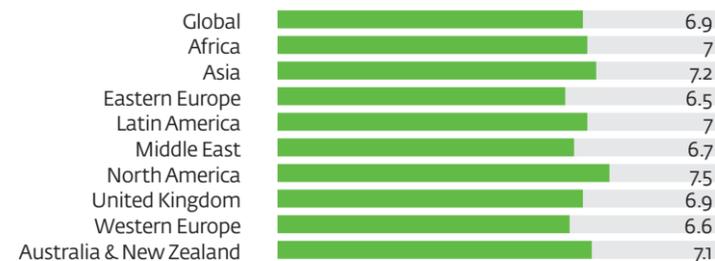
CORPORATE REPUTATION

Corporate CEOs in this market take corporate reputation seriously



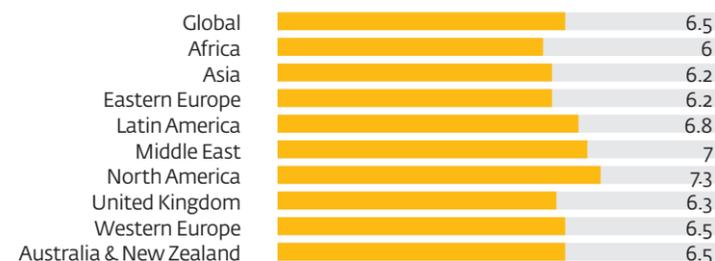
SOCIAL RESPONSIBILITY

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



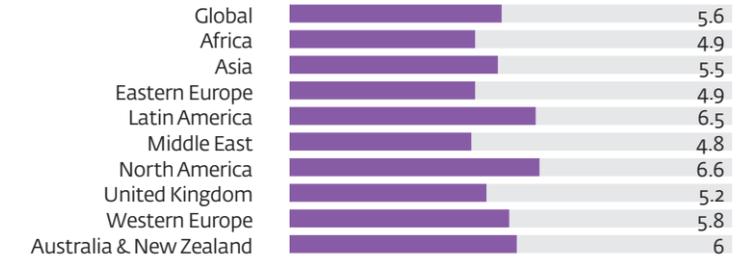
SHAREHOLDER INTEREST

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



MARKETING SPEND

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



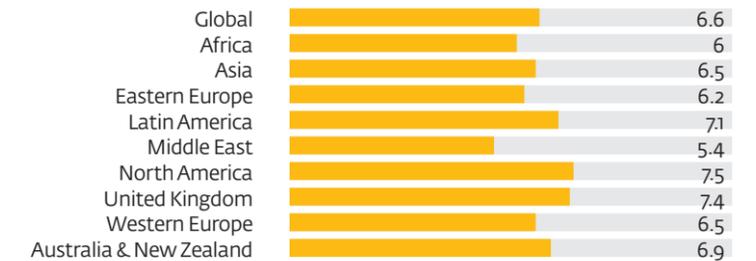
NON-TRADITIONAL SERVICES

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



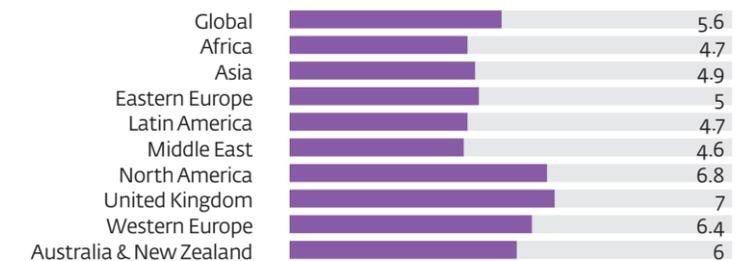
CLIENT'S DIGITAL NEEDS

PR agencies in this market are successfully addressing client digital needs



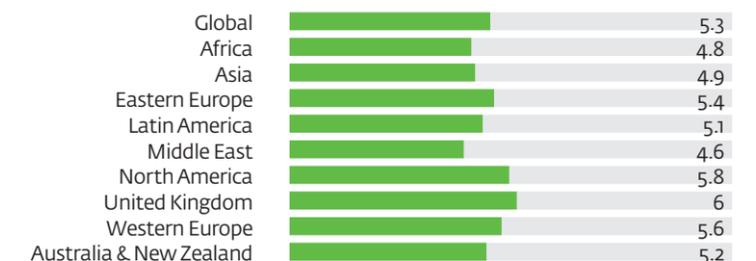
TALENT

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



OUTSOURCING

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



Magical storytelling



Gustavo Averbuj
Ketchum Argentina
Partner, Regional Director Latin America & CEO

A decade of populist governments in the region (Hugo Chavez and Nicolas Maduro in Venezuela, Dilma Rousseff in Brazil, plus the Kirchners in Argentina) created years of strong growth in public affairs, as organisations sought to connect with politicians, governments and other decision-makers.

Now the political pendulum has swung back to centre-right, pro-market governments, demand for PR in Latin America is changing. Today, digital work, influencer relations, creative campaigning and new media is centre stage. Crisis management skills are also in demand, particularly in markets with political unrest such as Venezuela.

The big hit the Brazilian economy has taken has affected the rest of Latin America. Most of our economies expect only moderate GDP growth in the short term.

Each market in the region is at a different stage of development and evolution. Some are close to what you might see in any global PR marketplace, while others lag behind - lacking the agencies that insist on global standards. However, most global PR networks have some presence in the region. While Latin America represents between 8% and 15% of income for most global Fortune

companies, PR budgets are usually less generous than elsewhere. Unable to replicate comprehensive Western campaigns, agencies here find new routes to success via creativity. This approach has brought dividends at global award shows such as the Cannes Lions International Festival of Creativity.

Several areas are at different development stages in the region: digital and mobile capacity, our approach to talent acquisition and training (where just a few of us offer global standard capabilities).

South America is a cradle of magical realism in literature. We are great storytellers. We naturally collaborate and imbue our work with an uncommon emotional intelligence. We also bring plenty of passion to our businesses. It is fun to work here.

There are global agencies, medium-sized boutiques and lots of small, specialist shops. As advertising undergoes an identity crisis, PR firms are getting a reputation for conjuring up campaign-leading ideas that work across all channels. Indeed, we are also seeing some PR firms leading entire campaign execution across paid, earned, shared and owned media. In LATAM, creativity and imagination reign supreme, no matter where ideas originate from.

“Each market in the region is at a different stage of development and evolution”





Mixing up the skillset



Beth Balsam
Hill+Knowlton
Strategies
US President
and CEO

As content and media have evolved, along with changing consumer media consumption habits, we have witnessed a blurring of lines between marketing disciplines over the past few years. And the rate of the blurring is only increasing.

Today, whether it is digital, marketing, media, corporate social responsibility, influencer, it is not clear where one starts and the other leaves off.

Whether it is a *Wall Street Journal* article that is read online, or social content we create for our clients, or a segment on *The Tonight Show*, PR is the art of influence and advocacy. That skill has never been more relevant or meaningful.

Donald Trump has proved me right. Let me be clear. This is not an endorsement of his candidacy or messaging. But love him or hate him, you have to admire the job he did manipulating the media coverage through the Republican primary. While competitors spent millions of dollars, Trump earned his coverage, at the rate of \$2bn of free media.

Fast-forward a few months and (at least at the time I am writing this in early August) Trump is tanking in the polls. Of course, from a strategy point of view, much of this is due to his failure to pivot toward the centre and

reimagine himself and his candidacy to appeal to a general election versus a primary voter. But I would also credit the steady drumbeat of media coverage, especially his mishandling of the Khan Gold Star military family, as the primary mover of the polls. Both the ascent and descent show the importance of influence and advocacy – two pieces of this blurred landscape that we do better than anyone.

In the consumer world, smart clients are moving toward holistic campaigns, played out in paid, earned, shared and owned spaces, that fall under one creative idea or platform. They have cross-collaborative agency teams that pull advertising, digital, PR, customer experience and in-store under cohesive messaging. Brands are growing their brand ambassador roles from top-tier spokespeople and celebrities as they always have done, to digital influencers with huge social followings. We can pinpoint influential brand evangelists who can lend an authentic voice to promotional campaigns.

Across the board, we are seeing clients use PR as a point of difference, enabling them to stand out, or as a point of parity, enabling them to maintain a healthy share of voice in a cluttered category. In either case, as it relates to influence and advocacy, the one thing PR should never be is left out.

“The ascent and descent of Trump shows the importance of influence and advocacy”

Country	Trade Association	Number of members	Website	Email
Armenia	Armenian Public Relations Association (APRA)	76	apra.am	info@apra.am
Australia	Public Relations Institute of Australia (PRIA)	93	pria.com.au	membership@pria.com.au
Austria	Public Relations Verband Austria (PRVA)	70	prva.at	office@prva.at
Belgium	Belgium Public Relations Consultants Association (BPRCA)	23	bprca.be	info@bprca.be
Brazil	Brazilian Association of Communication Agencies (ABRACOM)	214	abracom.org.br	contato@abracom.org.br
Bulgaria	Bulgarian Association of Public Relations Agencies (BAPRA)	20	bapra.bg	office@bapra.bg
Canada	Canadian Council of Public Relations Firms (CCPRF)	26	ccprf.ca	david.gordon@cohnwolfe.ca
Croatia	The Croatia Association for Public Relations (HUOJ)	550	huoj.hr	info@huoj.hr
Czech Republic	Czech Association of Public Relations Agencies (APRA)	20	apra.cz	info@apra.cz
Denmark	Public Relations Branchen	30	publicrelationsbranchen.dk	rsm@danskerhverv.dk

Country	Trade Association	Number of members	Website	Email
Finland	The Finnish Association of Marketing, Technology and Creativity (MTL)	29	mtl.fi	info@mtl.fi
France	Syntec Conseil en Relations Publics	51	syntec-rp.com	office@groupement-syntec.org
Germany	German Public Relations Association (GPRA)	35	gpra.de	info@gpra.de
Greece	Hellenic Association of Communications Agencies (EDEE)	16	edee.gr	edee@edee.gr
Hungary	Hungarian PR Association (HuPRA/MPRSZ)	12	mprsz.hu	mprsz@mprsz.hu
India	Public Relations Consultants Association of India (PRCAI)	34	prcai.org	jayoti.lahiri@prcai.org
Ireland	Public Relations Consultants Association of Ireland (PRCA)	28	prca.ie	info@prca.ie
Italy	Italian Association of Public Relations Agencies (Assorel)	19	assorel.it	info@assorel.it
Italy	Association of Communications Companies (Assocom - PR Hub)	84	assocom.org	info@assocom.org

Country	Trade association	Number of members	Website	Email
Kazakhstan	National Public Relations Association of the Republic of Kazakhstan (HACO)	8	naso.kz	asel@pressclub.kz
Netherlands	Dutch Association for PR & Communications Agencies (VPRA)	60	vpra.nl	info@vpra.nl
Nigeria	Public Relations Consultants Association of Nigeria (PRCAN)	54	prcan.ng	prcan@prcanng.com
Norway	Certified Communications Agencies Association (KOMM)	13	abelia.no	post@abelia.no
Poland	Zwiazek Firm Public Relations (ZFPR)	38	zfpr.pl	info@zfpr.pl
Portugal	Portuguese Association of Business Council in Communication and Public Relations (APECOM)	18	apecom.pt	sofia.barros@apecom.pt
Russia	The Russian Communications Consultancies Association (AKOS)	37	akospr.ru	director@akospr.ru
Serbia	Public Relations Society of Serbia (DSO)/PRSSRB)	25	pr.org.rs	drustvo@pr.org.rs
Slovenia	Chamber of Public Relations (ZOJ)	10	zsj.si	bozidar.novak@spem.si

Country	Trade association	Number of members	Website	Email
Slovakia	Association of Public Relations Slovak Republic (APRSR)	9	aprsr.eu	info@aprsr.eu
South Africa	The Public Relations Institute of Southern Africa (PRISA)	44	prisa.co.za	info@prisa.co.za
Spain	The Association of Communications and PR Consultancy Companies (ADECEC)	30	adecec.com	adecec@adecec.com
Sweden	Association of Public Relations Consulting in Sweden (PRECIS)	31	precis.se	info@precis.se
Switzerland	Association of Swiss PR Agencies (BPRA)	22	bpra.ch	info@bpra.ch
Turkey	Communication Consultancies Association of Turkey (IDA)	27	ida.org.tr	ida@ida.org.tr
Middle East & North Africa	Public Relations and Communications Association MENA (PRCA MENA)	15	prca.org.uk/mena	leanne.foy@prca.org.uk
UK	Public Relations and Communications Association (PRCA)	438	prca.org.uk	communications@prca.org.uk
US	PR Council	106	prcouncil.net	contact@prcouncil.net



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