

2015 World PR Report: Global Agency Ranking & Survey

Introduction

The Holmes Report is again collaborating with ICCO to produce the World PR Report, chronicling the size and stature of the global PR industry.

The Report includes the annual Global Ranking of Public Relations Firms, along with a definitive survey of industry trends, issues and challenges.

The World PR Report provides a rich wealth of data on the size, growth and performance of the global public relations industry.

To participate in the ranking and survey, complete as much of the following form as you are able by our deadline - April 3, 2015 — and return to arun@holmesreport.com

A: DETAILS OF YOUR FIRM

*** 1. Name of firm/agency**

2. Your name and title

*** 3. Your email address**

4. Name and title of CEO/managing director/chairman of firm

5. Headquarters Address

6. Country

7. Firm/agency website

8. Is your public relations firm an independent (ie owner-operated) company?

Yes

No

Please click on the appropriate response.

If no, please indicate the nature of agency ownership (i.e. publicly held, by communications holding company, advertising agency, or other company):

9. Is your firm a member of any affiliate network or partnership of independent firms?

Yes

No

Please explain below

10. If yes please provide the name of your affiliate or independent agency network

***12. Do you wish to provide financial information?**

- Yes
- No (skip to Trends & Issues section)

B: FINANCIAL INFORMATION

The Holmes Report defines public relations broadly as any activity designated 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 survey and ranking should involve either strategic, media-neutral counsel or earned media relations, 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.

***13. Please tick here to certify that the primary business of your firm is public relations, as defined here:**

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 statement refers to my firm

14. Information may be provided in the following currencies. Please choose which one applies to your submission.

UK pounds sterling

US dollars

Euros

PLEASE INCLUDE ONLY REVENUE FROM OPERATIONS IN WHICH YOUR FIRM HAS AN OWNERSHIP POSITION OF 50.1% OR GREATER

Notes: the term 'fee income' relates to net public relations fees plus mark ups and commissions, and to work billed during the calendar year 2014. If you are responding on behalf of a firm with public relations subsidiaries in which your firm holds 51% or more, you may include 100% of the subsidiary fee income in this total. UK numbers should not include VAT. This information should be read and signed, preferably by an outside auditor but if no outside auditor is available, by a senior officer of the firm. Note: the information gathered during this survey will be used to create a ranking of public relations firms, by size, in the major markets of the world. It will be widely used for benchmarking industry performance. It is therefore important that this information be verified as accurate.

15. What was your firm's total public relations fee income for the year ended December 31, 2014?

16. What was your firm's total public relations fee income for the previous year ended December 31, 2013?

17. How many full-time (or full-time equivalent) public relations employees did your firm employ for the year ended December 31, 2014?

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18. How many full-time (or full-time equivalent) public relations employees did your firm employ for the previous year ended December 31, 2013?

19. If these numbers include fees from subsidiaries operating under different names, please list the subsidiary companies here, including and a brief description of their activities.

20. Please identify any acquisitions your firm made during 2014

C. GEOGRAPHY, SECTORS & PRACTICES

21. What is your fee income in each of the following geographic regions/countries?

Total North America	<input type="text"/>
Total UK	<input type="text"/>
Total Continental Europe	<input type="text"/>
Total Middle East and Africa	<input type="text"/>
Total Asia-Pacific	<input type="text"/>
Total Latin America	<input type="text"/>

22. What is your fee income from companies in the following sectors?

(Note: The total entered below should add up to 100%)

Consumer goods	<input type="text"/>
Industrial/manufacturing	<input type="text"/>
Healthcare	<input type="text"/>
Technology	<input type="text"/>
Financial/professional services	<input type="text"/>
Government/public sector	<input type="text"/>
Not-for-profit	<input type="text"/>

23. What is your fee income from activities in the following practice areas?

(Note: The total entered below should add up to 100%)

Consumer marketing	<input type="text"/>
Business-to-business marketing	<input type="text"/>
Corporate communications	<input type="text"/>
Financial communications	<input type="text"/>
Public affairs	<input type="text"/>
Crisis communications	<input type="text"/>
Employee communications	<input type="text"/>
Digital/social media	<input type="text"/>

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E. CERTIFICATION

The following section should be read and signed, preferably by an outside auditor but if no outside auditor is available by a senior officer of the firm.

Note: The information gathered on this form will be used to create a ranking of public relations firms, by size, in the major markets of the world. It will be widely used for benchmarking industry performance. It is therefore important that this information be verified as accurate.

The Holmes Report defined 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, corporate 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.

The term fee income relates to net public relations fees plus mark up and to work billed during the calendar year 2013. If you are responding on behalf of a firm with subsidiaries in which your firm holds 51 percent or more, you may include 100 percent of the fee income in this total. You should not include fee income from any operation in which you own less than 50 percent. Numbers should not include VAT or other applicable sales taxes.

This form should be signed by a senior executive (CEO/managing director/chairman/CFO) of the submitting firm, and if possible countersigned by a representative of an outside accounting or auditing firm.

***24. I certify that the information submitted on these forms is accurate to the best of my knowledge**

Name

Date

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D. TRENDS & ISSUES

The information provided in this section is to be combined with a duplicate survey of ICCO members to produce a definitive report on the state of the global PR industry

On a scale of 1 to 10, with (1) meaning strong disagreement and (10) meaning complete agreement, tell us how much you agree with each of these statements as they relate to your market. Firms operating in more than one market may answer on behalf of a single office, or the regional (Europe, Asia, North America) or global marketplace.

25. Your market? Please select all that apply

- North America
- Latin America
- UK & Ireland
- Western Europe
- Eastern Europe
- Asia
- Australia/NZ
- Middle East
- Africa
- Global

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

- 1 2 3 4 5 6 7 8 9 10

27. I expect an increase in agency profitability this year

- 1 2 3 4 5 6 7 8 9 10

28. Corporate CEOs in this market take corporate reputation seriously

- 1 2 3 4 5 6 7 8 9 10

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

- 1 2 3 4 5 6 7 8 9 10

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

- 1 2 3 4 5 6 7 8 9 10

31. Marketers in this market are increasing their spend on public relations relative to other marketing disciplines

- 1 2 3 4 5 6 7 8 9 10

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

- 1 2 3 4 5 6 7 8 9 10

33. PR agencies in this market are successfully addressing client digital needs

- 1 2 3 4 5 6 7 8 9 10

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

- 1 2 3 4 5 6 7 8 9 10

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

- 1 2 3 4 5 6 7 8 9 10

36. In which of the following areas did you see most growth last year? (Please check a maximum of three)

- Social media community management
- Digital build and production
- Multimedia content creation
- Insight and planning
- Professional development
- Creativity
- Media relations
- Research
- Measurement and analytics
- Senior counsel
- Marketing and business development
- Paid media

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37. In which of the following areas do you expect to increase your investment this year? (Please check a maximum of three)

- Social media community management
- Digital build and production
- Multimedia content creation
- Insight and planning
- Professional development
- Creativity
- Media relations
- Research
- Measurement and analytics
- Senior counsel
- Marketing and business development
- Paid media

38. Which of the following issues is the greatest challenge for PR firms in your market? (Please check a maximum of three)

- Staff recruitment
- Staff retention
- Digital and new technologies
- Professional development
- Competition for clients from other PR firms
- Competition from other marketing disciplines
- Competition from other professional service firms
- Clients moving PR in-house
- Financial pressure to meet profit/margin targets
- Economic conditions generally
- Lack of strong, visible leadership in industry
- Lack of client understanding of PR
- PR managed at junior level by clients
- Clients unwilling to commit sufficient funds
- Clients too focused on short-term
- Media corruption (pay for play, etc.)
- Media hostility to PR
- Inability to effectively measure impact of PR

39. In which of the following areas did you see most growth last year? (Please check a maximum of three)

- Corporate reputation
- Marketing communications
- Public affairs/government relations
- Investor relations/financial communications
- Social responsibility
- Employee communications
- Digital/online communications
- Word-of-mouth

40. In which of the following sectors did you see most growth last year? (Please check a maximum of three)

- Consumer products
- Food and beverage
- Industrial/manufacturing
- Healthcare
- Technology
- Financial and professional services
- Public sector
- Not-for-profit

41. In which of the following areas do you expect to see most growth over the next few years? (Please check a maximum of three)

- Corporate reputation Paid media
- Marketing communications
- Public affairs/government relations
- Investor relations/financial communications
- Social responsibility
- Employee communications
- Digital/online communications
- Word-of-mouth

42. In which of the following sectors do you expect to see most growth over the next few years? (Please check a maximum of three)

- Consumer products
- Food and beverage
- Industrial/manufacturing
- Healthcare
- Technology
- Financial and professional services
- Public sector
- Not-for-profit

43. Where are you likely to source talent from this year? (please select 3 max)

- Rival agencies
- In-house comms departments
- Journalism
- Graduate programs
- Advertising and marketing
- Research and analytics
- Other professional services, such as law of management consultancy

Other (please specify)

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

- Expected salary levels
- Investment in retraining
- Unwillingness to challenge the status quo
- Recruitment consultants
- Lack of transferable skills
- Lack of interest from potential recruits

Other (please specify)

45. What is the biggest challenge you face when it comes to your talent strategy? (please select 3 max)

- Hiring junior staff
- Hiring mid-level staff
- Hiring senior staff
- Training/developing junior and mid-level staff
- Finding people from non-traditional backgrounds
- Retaining key talent
- Motivating younger executives
- Incentivising senior staff
- Recruitment consultants

**46. Looking at the next decade, which skills will be most relevant for PR executives?
(please select 3 max)**

- Social media community management
- Digital build and production
- Multimedia content creation
- Insight and planning
- Creativity
- Media relations
- Paid media
- Research
- Measurement and analytics
- Crisis counsel
- CSR
- Marketing and business development

47. Would you like to subscribe to The Holmes Report's

Editorial newsletter

Marketing and events announcements

None of the above