# 2011 CIPR: State of the PR Profession
## *Benchmarking Survey*

## December 2011

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***Andrew Hawkins MCIPR, Chairman ComRes***

*This year's CIPR membership survey has highlighted once again that despite the on-going impact of the economic downturn upon PR practitioners, the sector continues to adjust and find ways of exploring new opportunities.*

*As was anticipated in last year's survey, in-house public sector practitioners have borne the brunt of contraction within the sector and continue to be the most anxious regarding the prospect of redundancy over the coming year. However, encouragingly for the profession, practitioners working for consultancies and in-house in the private sector are notably more optimistic, with around half saying that their organisations are recruiting new staff.*

*Broadly speaking, results suggest that crisis management and online reputation management are continuing to be the key growth areas, the continuation of a trend that was apparent in both the 2009 and 2010 surveys. While sponsorship continues to be an area that is seeing decline, the growth in other areas is testament to the adaptability of the PR industry.*

*ComRes is delighted to have conducted this study on behalf of the CIPR. Our particular thanks also go to all those who participated in this study – we are extremely grateful for your time and input.*

# METHODOLOGY

ComRes surveyed 1,564 CIPR members online between 7th September and 10th October 2011. The survey was conducted according to the Code of Conduct of the Market Research Society.

**ComRes is a member of the British Polling Council and abides by its rules (**www.britishpollingcouncil.org**). This commits us to the highest standards of transparency.**

**The BPC's rules state that all data and research findings made on the basis of surveys conducted by member organisations that enter the public domain must include reference to the following:**

- **The company conducting the research (ComRes)**
- **The client commissioning the survey**
- **Dates of interviewing**
- **Method of obtaining the interviews (e.g. in-person, post, telephone, internet)**
- **The universe effectively represented (all adults, voters etc)**
- **The percentages upon which conclusions are based**
- **Size of the sample and geographic coverage.**

**Published references (such as a press release) should also show a web address where full data tables may be viewed, and they should also show the complete wording of questions upon which any data that has entered the public domain are based.**

**All press releases or other publications must be checked with ComRes before use. ComRes requires 48 hours to check a press release unless otherwise agreed.**

# EXECUTIVE SUMMARY

As part of ComRes's role as the CIPR's polling partner, this survey was conducted in order to focus on the current issues, and to track the trends, relating to the state of the PR profession.

Major themes to emerge from this report are the effects of the economic downturn, including the fallout of cuts; and areas of growth and decline within the profession.

## RIDING THE STORM OF THE RECESSION

The effects of the economic downturn on the PR profession are clear to see from this survey. In particular, the impact upon public sector practitioners is striking; the overall percentage of participants in this survey who work in-house in the public sector has fallen from last year, while they are far more likely to be worried about being made redundant and far less likely to say that their organisation is currently recruiting.

Beyond the public sector however, there are indications of improvement. More than half of private sector practitioners say their organisations are recruiting staff and, across the industry as a whole, just a fifth (20%) are currently worried about the prospect of redundancy, down from more than a quarter (28%) last year.

## AREAS OF GROWTH

There are signs that the profession is adapting to the new climate. As we have seen in previous years, the strongest growth is in online reputation management. In similar fashion to last year, crisis management is also seen as a growth area. It seems that in the current economic landscape, company performance and reputation management remain increasingly important to client organisations.

## AREAS OF DECLINE

As with last year, practitioners say that they expect sponsorship to experience the greatest rate of decline. Event management is the next area that appears to be experiencing cut backs by the profession this year. Interestingly however, while practitioners have reported this trend in previous years, the actual number of practitioners who say they are involved in these areas has not seen a corresponding fall.

## THE PROFILE OF THE INDUSTRY

As with previous years, despite the fact that nearly two thirds of PR practitioners are female, male practitioners employed in the profession are more likely to be in a senior position, with a higher salary and to have a position on the board of their organisation. In part this can be seen to reflect demographics – male practitioners tend to be older and as a result are more likely to be in more senior positions and earn higher salaries.

## 1 SAMPLE PROFILE & CONTEXT

Before the detail of the survey is addressed, this first section summarises the profile of PR practitioners who took part. PR practitioners were asked to give detailed information on their professional role.

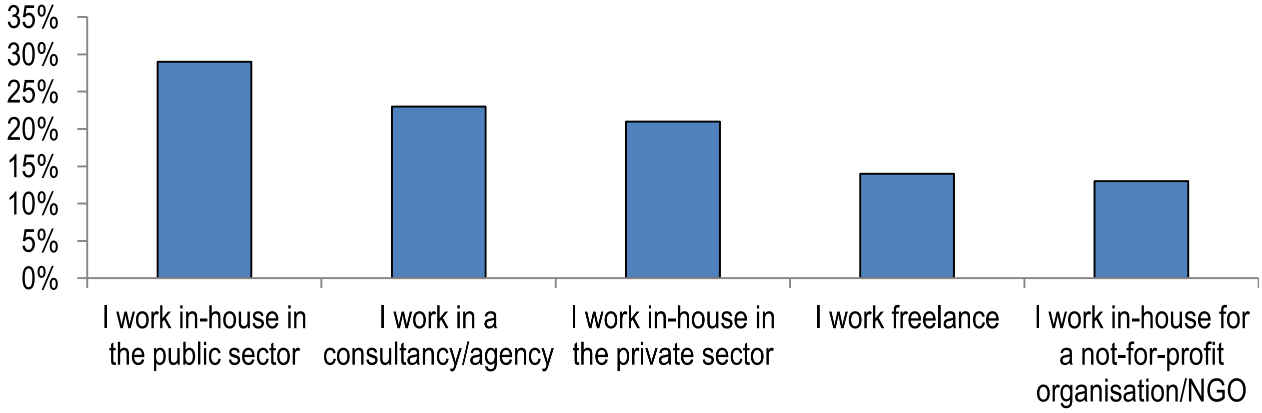


**Fig.1.1: Occupational role**
**Base: All practitioners**

The highest percentage of practitioners is employed in-house in the public sector (29%). This is followed by consultancies or agencies (23%) and in-house in the private sector (21%). PR practitioners are the least likely to be freelance (14%) and employed in-house for a not-for-profit/NGO (13%). CIPR estimates that its membership as a whole is made up of 55% in-house PR practitioners and 45% consultancy PR practitioners.

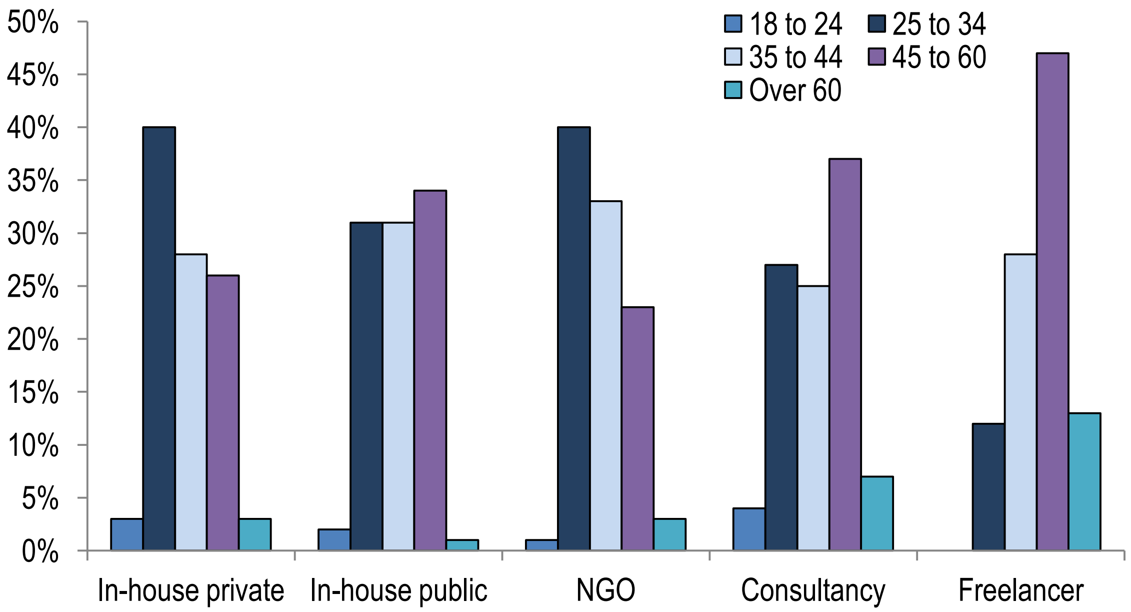


**Fig 1.2: Organisation type, by age range**
**Base: All practitioners, by employer type**

A breakdown of occupation by age group highlights some interesting trends. Private sector practitioners are more likely to be in younger age groups – they are most likely to be in the 25 to 34 age group (40%), and are decreasingly likely to be from older age groups. Conversely, freelancers tend to be older – almost half (47%) are aged 45 to 60, while just one in eight are aged 25 to 34.

PR practitioners were asked to go into further detail about the nature of their role within the profession. The chart below illustrates what level of responsibility respondents hold in their organisation**.**

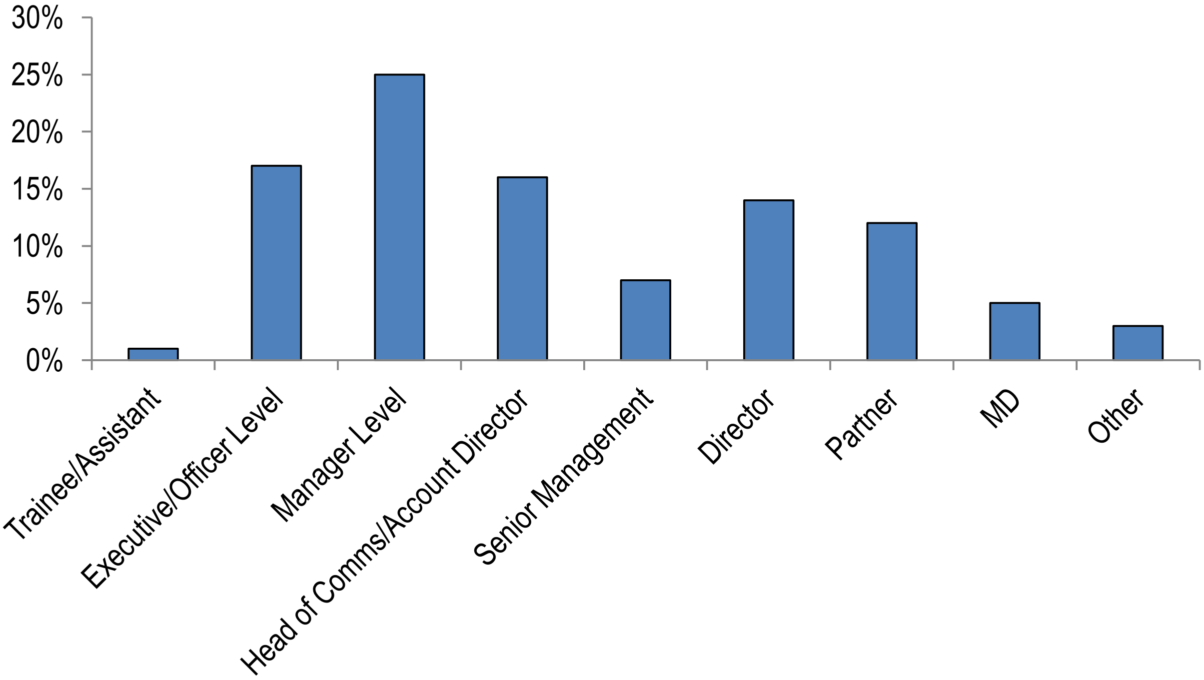


**Fig 1.3a: Responsibility within organisation**
**Base: All practitioners**

The largest number of participants are in mid-level positions, with those of PR Manager or Account Manager level comprising a quarter of practitioners (25%). This is followed by Executive or Officer level (17%) participants. Heads of Communications/ Account Directors are next, with 16% holding this position.

A breakdown of responsibility within organisation by gender highlights some clear divergences.

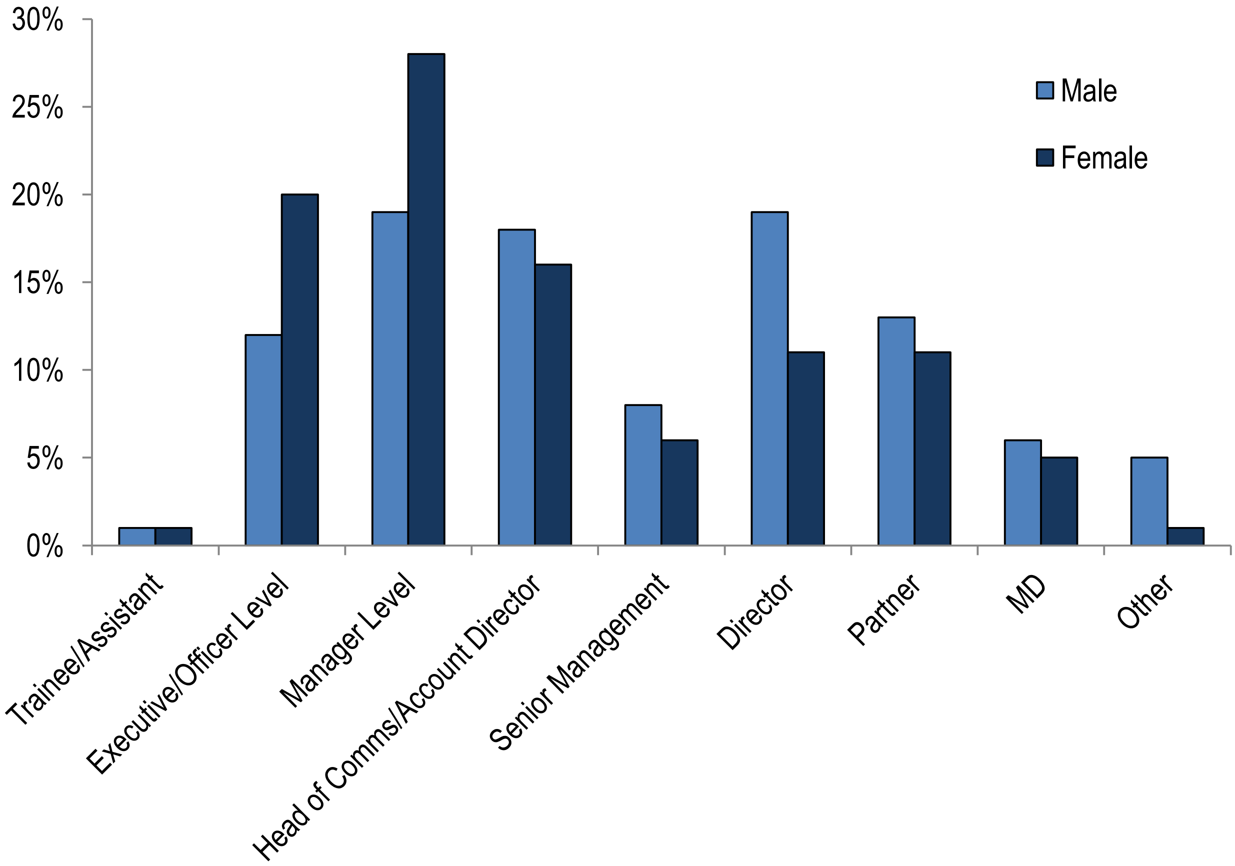


**Fig 1.3b: Responsibility within Organisation, by Gender**
**Base: All practitioners**

Particularly, women are much more likely to hold executive/officer level (20% compared with 12% of men) or manager level positions (28% compared with 19% of men). Meanwhile men are more likely to be in senior management (8% compared with 6% of women), director (19% compared with 11% of women) or partner level (13% compared with 11% of women) positions.

This is very similar to the trend we identified last year and some of the same possible factors should be considered. While more women answered our survey than men, this was most concentrated in the lower age brackets where one would typically expect PR practitioners to hold positions with less responsibility within their organisations – most notably in the 25-34 age group, where women outnumber men by a ratio greater than 3:1.

Indeed, once we get to those aged 60 or over, the age group which one would expect would be most likely to contain practitioners with the most responsibility, there are actually more male participants than female.

The reasons for the differences by age and level of seniority may well be related, but the key point is that men tend to be both older and in more senior positions. Therefore the average age of men is older than women and men are more likely to be in senior positions (but this does not mean that women are not in senior positions).

It is worth noting that while overall considerably more women answered our survey than men (In total 990 women compared with 573 men); women are more likely to hold positions of responsibility lower down within their organisations.[1]

Practitioners were also asked to give details on what part of the PR industry they are involved in. Fig 1.4 illustrates the PR functions in which in-house practitioners are involved.

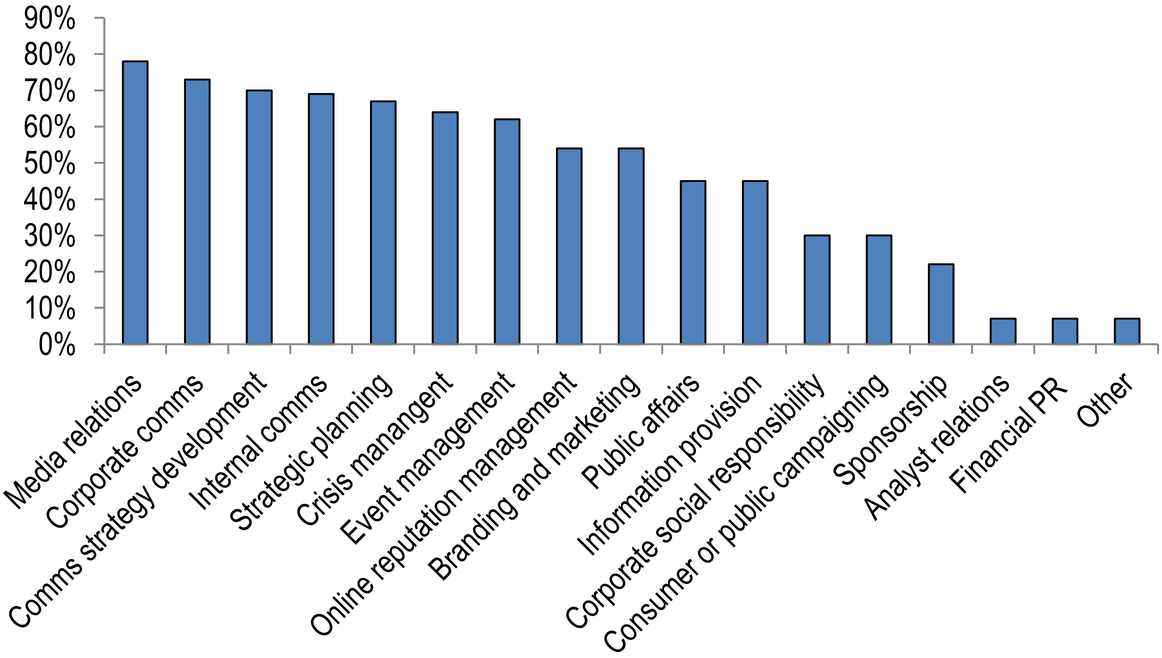


**Fig.1.4: Type of PR functions practioners are involved in**
**Base: All in-house practitioners**

Most notably, Fig 1.4 illustrates that in-house practitioners are not isolated in the functions they carry out on a daily basis. Indeed, the majority of in-house practitioners, both in the public and private sector, conduct a range of PR tasks.

As was the case in last year's survey, in-house practitioners (78%) are most likely to be involved in media relations. Clearly this relates to the fact that the media is a key communications channel between an organisation and the public.

The other most common PR functions in-house practitioners are involved relate to communications – corporate communications (73%), communications strategy development (70%) and internal communications (69%). Again, these were among the most common functions performed by in-house practitioners last year.

[1] A breakdown of participants who completed this survey by gender reveals a split of 63% women and 37% men. This is in line with the wider PR community, which a 2005 CEBR survey found to be roughly two-thirds women. Interestingly, CIPR itself has a slightly different ratio, with roughly 55% women and 45% men – suggesting that female CIPR members were more likely to engage with this membership survey than their male counterparts.

Similarly, as with last year, financial PR (7%) and analyst relations (7%) are the two functions in-house practitioners are least likely to be involved with.

While the results are largely similar to those from last year, there are a few functions that seem to have grown in importance. Most notably, 54% of in-house practitioners now say that online reputation management is a PR function they are involved with, compared with just 47% last year. Crisis management has grown from 60% last year to 64% this year, and information provision has gone from 41% to 45%.

This is undoubtedly due in part to the fact that the financial crisis has led to companies and organisations needing reputation and crisis management services even more than they would in ‘normal’ economic times.

It is interesting to consider these growth areas in the context of what practitioners expected the greatest areas of growth and decline to be in last year’s survey. Online reputation management was seen as the most likely area of growth over the next five years (73%), while 43% thought that crisis management would be an area of growth. Conversely, information provision was actually among the areas practitioners were most likely to expect would decline.

Consultancy and agency practitioners were also asked to give details on what part of the PR industry they are involved in.

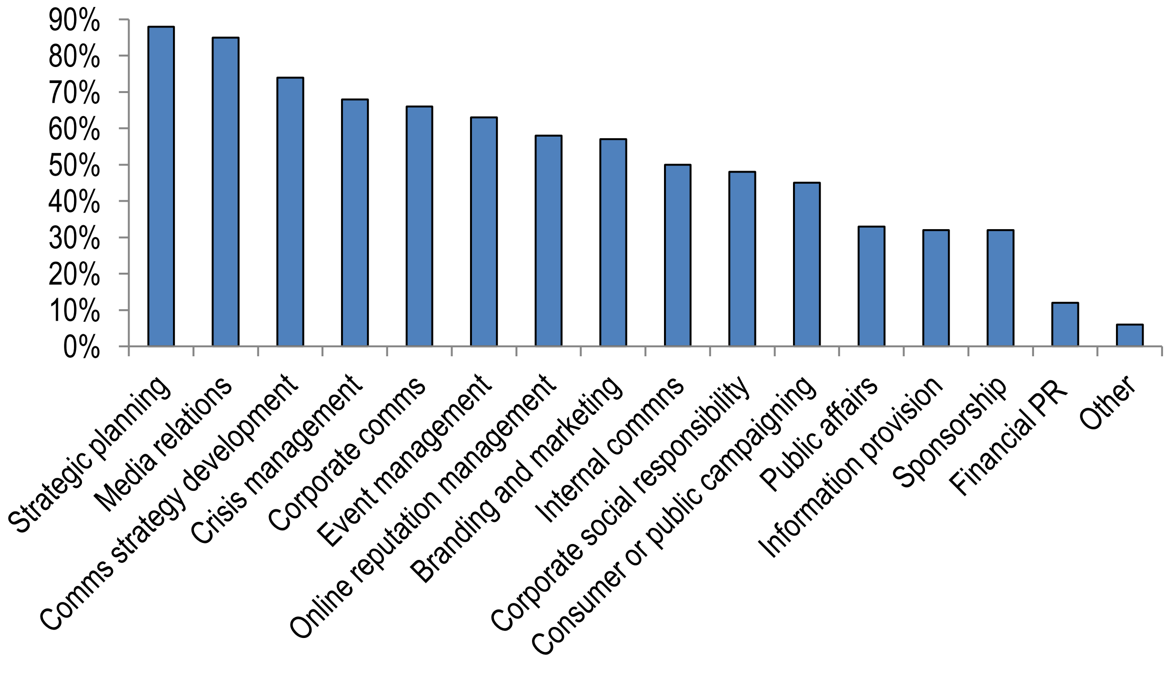


**Fig.1.5: PR functions that practitioners are involved in**
**Base: All consultancy / agency practitioners**

The largest percentage of consultancy practitioners is involved in strategic planning (88%). This is closely followed by media relations (85%). There is also significant consultancy PR involvement in communication strategy development (74%). These were also the top three PR functions that consultancy and agency practitioners gave in last year’s survey.

The smallest proportions of consultancy practitioners (12%) are involved in financial PR, as was the case last year.

The responses of consultancy/ agency practitioners reflect a similarly wide spread of functions as those of in-house practitioners. There are some key differences between the frequencies of certain functions, with strategic planning a more likely function for consultancy (88%) than in-house (67%) practitioners. As might be expected, internal communications is a more likely function for in-house (69%) rather than consultancy (50%) practitioners.

## 2. RAMIFICATIONS OF THE FINANCIAL CRISIS

We asked respondents to comment on their perspectives of how the economic downturn is affecting the organisations they are working in.

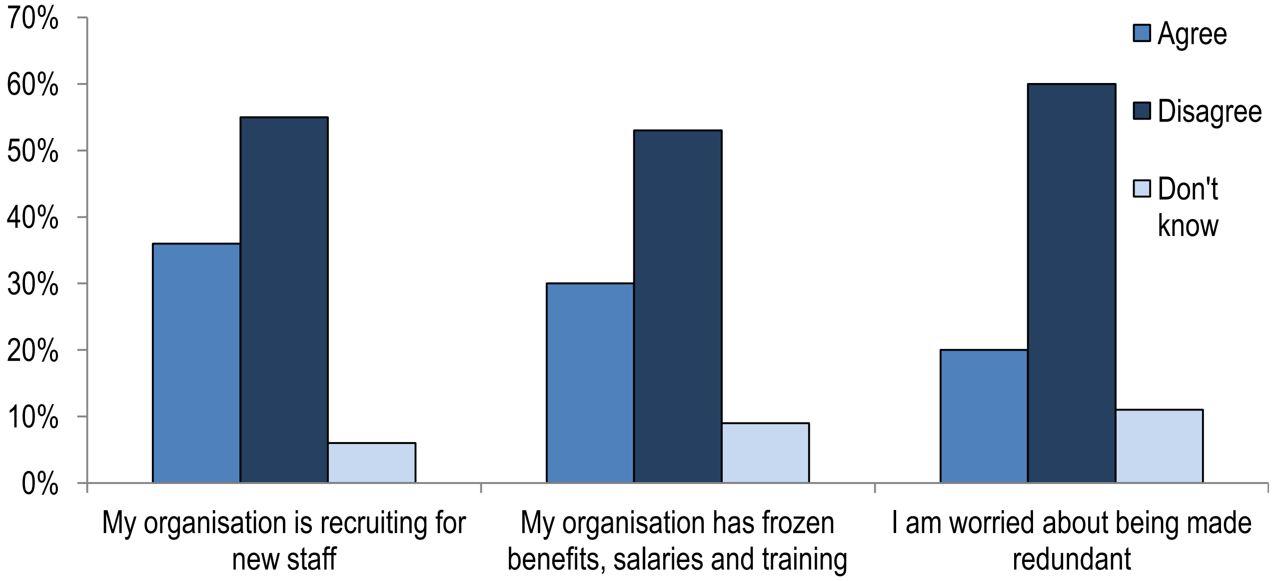


**Fig.2.1a: Potential effects of the economic downturn**
**Base: All practitioners**

Just 20% of PR practitioners agree that they are worried about being made redundant. This is down from 28% when we asked the same question last year. Indeed, more than half (53%) disagree that their organisation has frozen benefits, salaries and training. This might suggest that PR practitioners are beginning to feel more comfortable about the health of their organisations' finances.

None-the-less, it is worth noting that a majority (55%) disagree that their organisation is recruiting for new staff - while they may be starting to feel more comfortable about their own position, the indication is that they don't think that their organisations have come out of the other side of the economic downturn yet.

The results of this question have been analysed by employer type. Fig 2.1b illustrates the percentage of practitioners who agree with two of the statements.

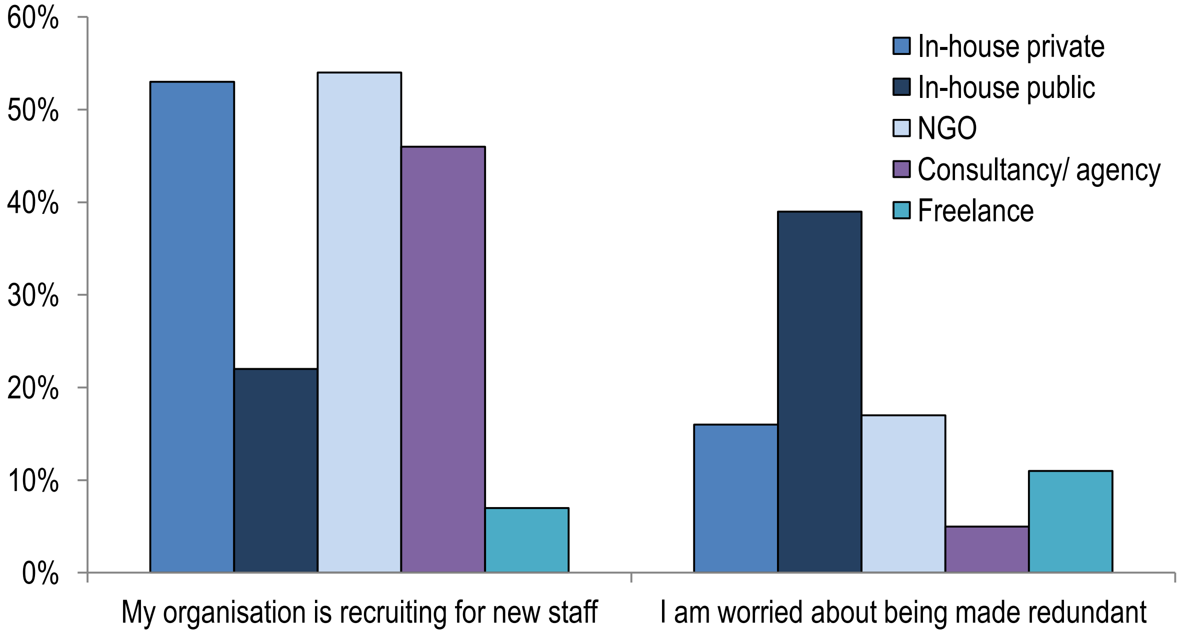


**Fig.2.1b: Potential effects of economic downturn, by practitioners who agree with these statements**
**Base: All practitioners who agree, by employer type**

It is evident that practitioners employed in-house in the public sector are suffering the most from the symptoms of the economic downturn. Two fifths (39%) of all in-house public sector practitioners are worried about being made redundant, and less than a quarter (22%) agree that their organisation is likely to recruit in the next 12 months.

This was also the case in last year's survey and the validity of this sentiment is most starkly demonstrated by a breakdown of responses to the survey – in 2010, 34% of participants were in-house public practitioners, compared to just 29% this year, which would appear to confirm that they have taken the brunt of job losses in PR jobs as a result of the economic downturn.

Practitioners were then asked where they expect the greatest areas of growth and decline within their organisation to be in the next five years.

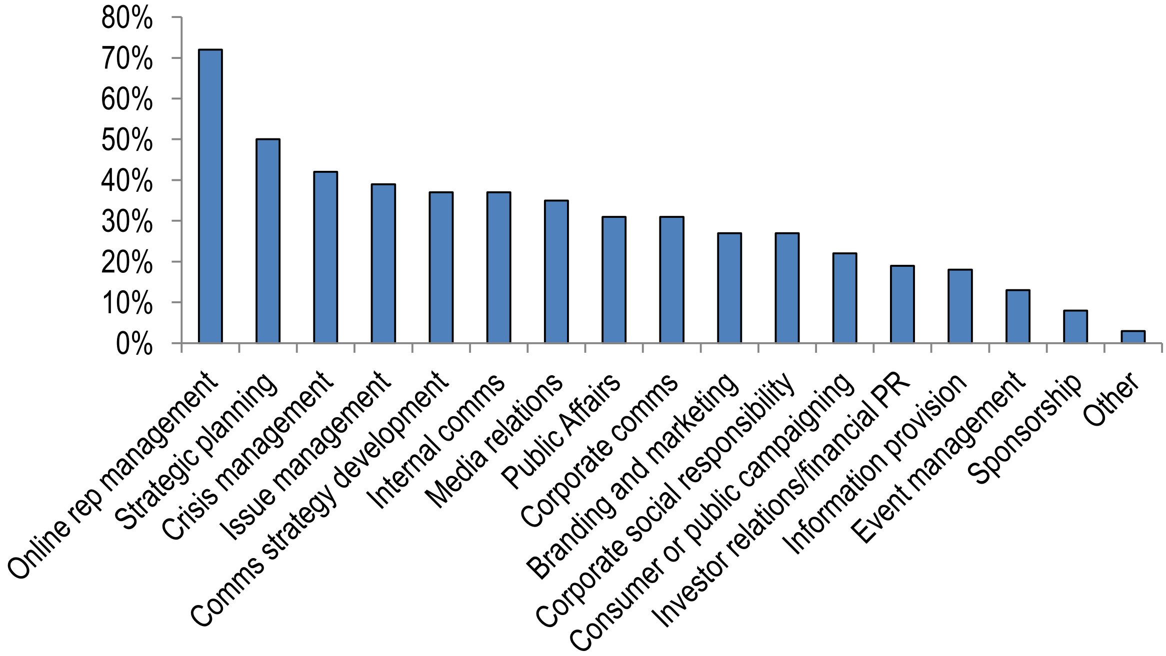


**Fig.2.2b: Areas of greatest growth in the next five years**
**Base: All practitioners**

The breadth and frequency of responses to this question seem to reflect an optimism regarding the medium-term among PR practitioners. Online reputation management (72%) stands out; however there are several other areas that are identified, such as strategic planning (50%) and crisis management (42%).

The increased number of people citing online reputation management and crisis management as a PR function – highlighted earlier in this report – suggests that this optimism is not misplaced.

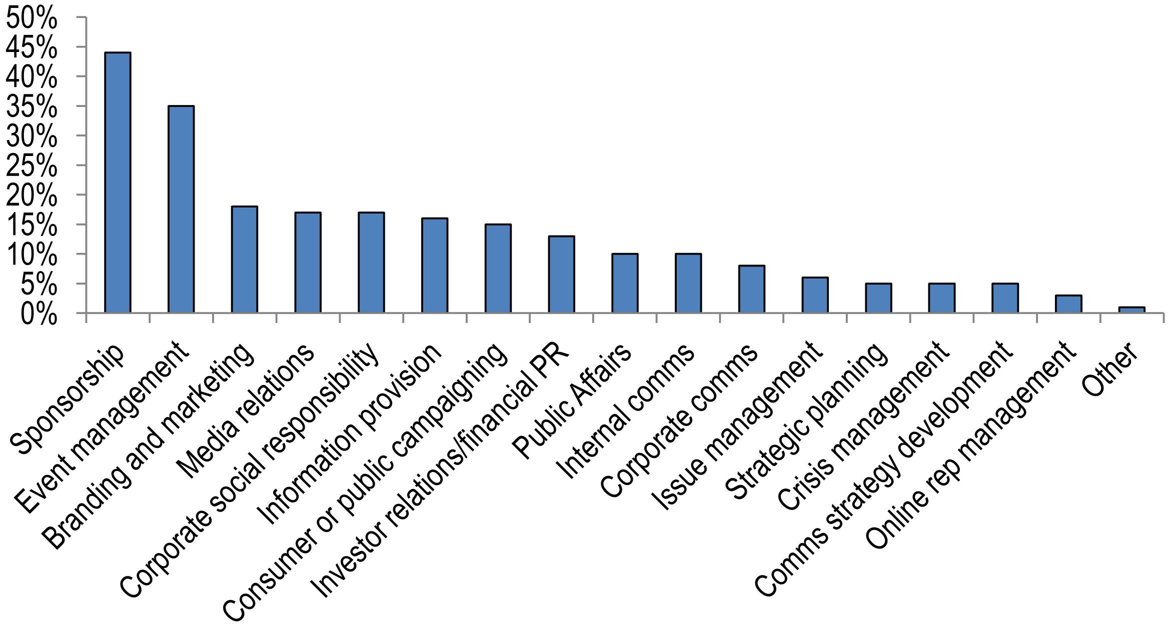


**Fig.2.3: Areas of greatest decline in the next five years**
**Base: All Practitioners**

Looking specifically at the negative impact of the economic downturn, it seems that the activity which PR practitioners are mostly likely to expect will decline is sponsorship, with 44% of practitioners expecting it to decline, followed by events management (35%). These results closely reflect last year's findings, when 43% and 33% said sponsorship and events management were likely to be the areas of greatest decline.

Interestingly however, a comparison of the PR functions given by both in-house and consultancy PR practitioners this year and last year indicates no fall in the number practitioners involved in either of these functions. This suggests that these areas might not be experiencing as great a decline as some practitioners have expected.

PR practitioners were asked how satisfied they are with their skills to develop effective strategies and to implement online and social media campaigns for their organisation.


**Fig.2.4: Knowledge satisfaction**
**Base: All practitioners**

99% of practitioners are satisfied with their skills and knowledge, while just 1% say they are not very satisfied. However, it is notable that 58% say that they could learn more.

Participants employed in-house were questioned whether budgetary pressures have made them work more closely with other departments in their organisation.

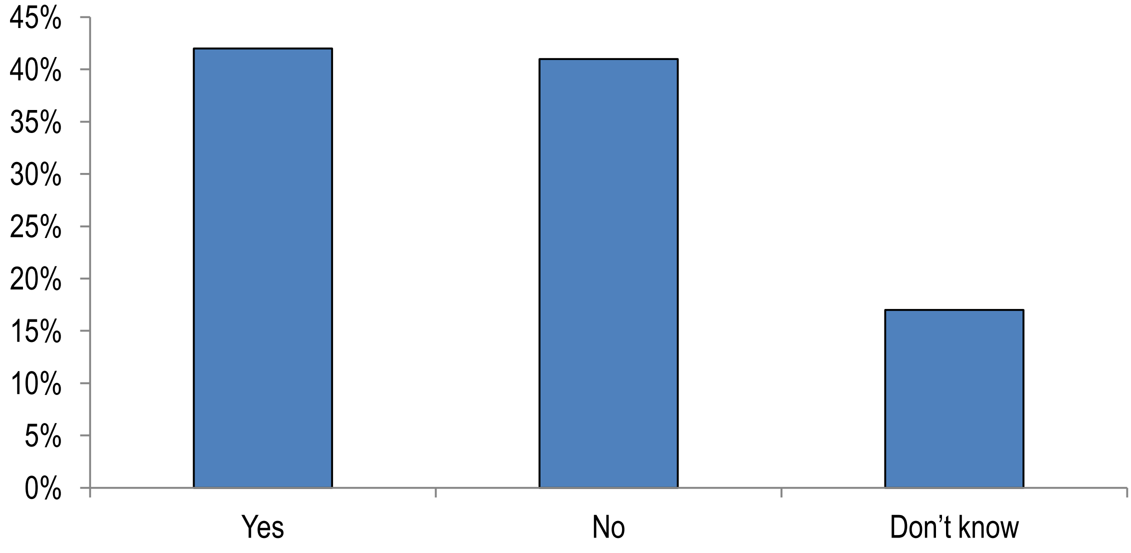


**Fig.2.5: Have budgetary pressures brought departments closer together**
**Base: All in-house practitioners**

There is an almost even split in response to this question, with 42% of PR practitioners saying that budgetary pressures have brought departments closer together and 41% saying they haven't. This split is similar to last year's result, where 43% said they had and 40% said they hadn't.

The 42% of in-house respondents who said that budgetary pressures have brought different departments in their organisation closer together were then asked which departments they are now working more closely with.

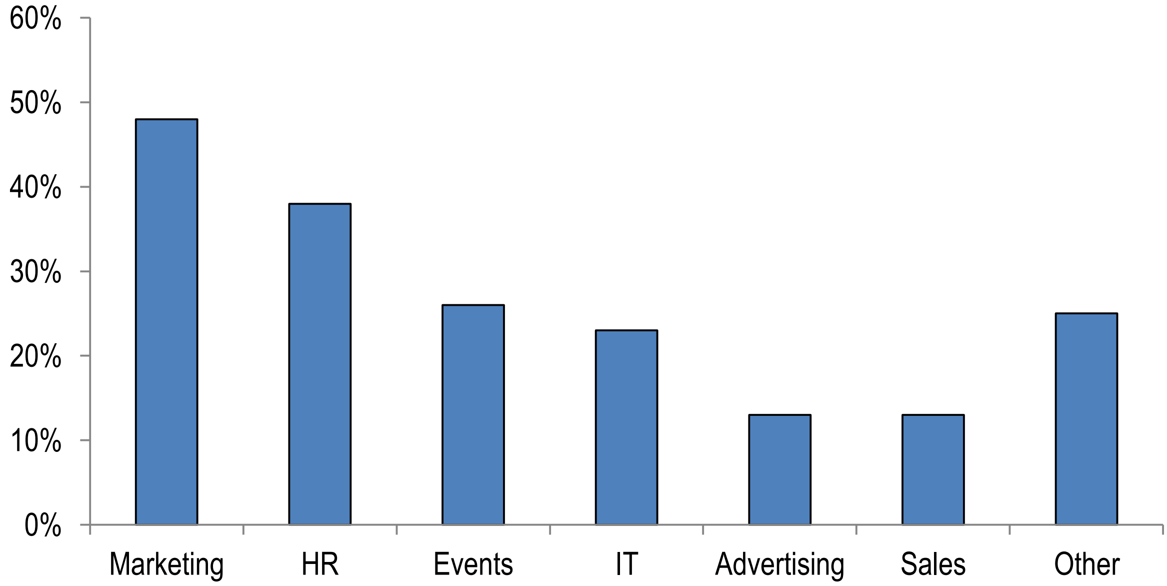


**Fig.2.6: Which departments are you working closer with**
**Base: All in-house practitioners who are working closer together**

Fig 2.6 illustrates that participants are most often working more closely with their marketing colleagues (48%), followed by HR (38%). Again, these were the two most frequently given answers in last year's survey. Interestingly however, right across the board the percentages are much higher for 2011 than they were in 2010.

This suggests that while a similar proportion of practitioners as last year are seeing departments being brought closer together, in the organisations where this is happening, a much greater degree of integration is taking place.

# 3. PR BUDGETS & SALARIES

Public Relations has become a multi-billion pound profession. It is illuminating therefore to scrutinize the financial performance of the PR profession and to see how it has grown in the context of an economic recession. In order to do so, practitioners were asked what their organisation's turnover was two years ago, and in the last financial year.[2]

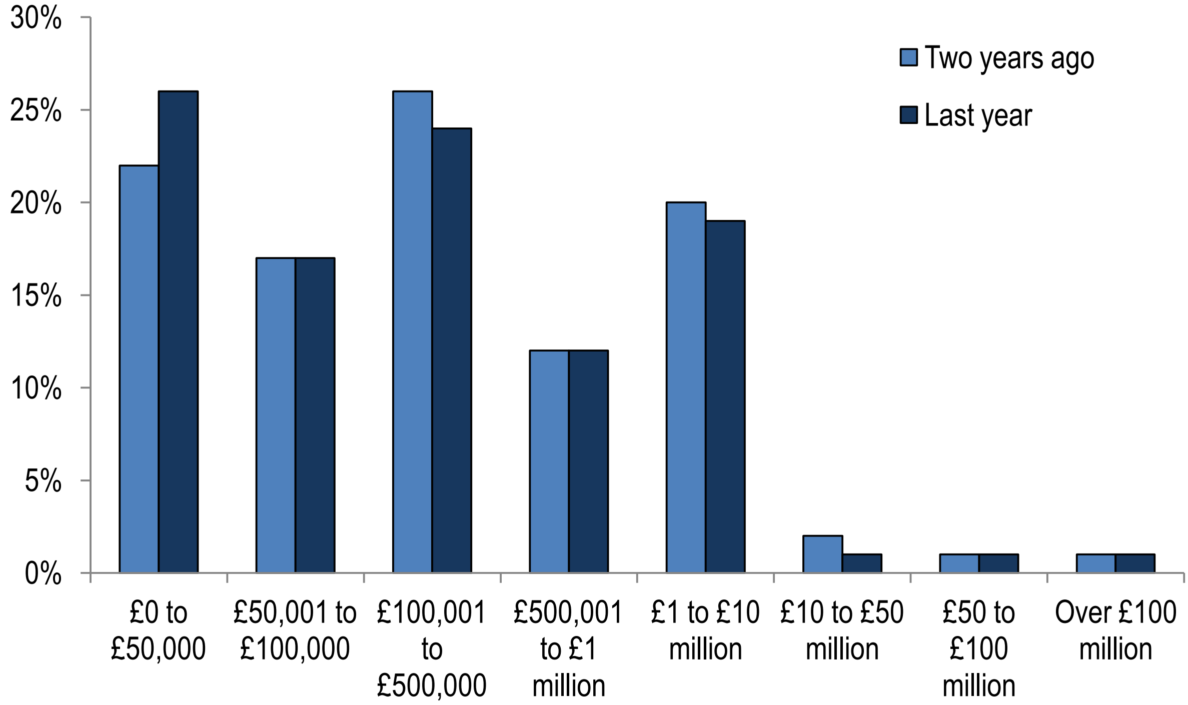


**Fig.3.1: Financial turnover**
**Base: All who work in consultancy/ freelance**

A significant percentage of consultancy/ freelance practitioners estimate their organisation to have had a turnover of above £1 million (22%) in the last financial year. This is slightly lower than their estimates of two years ago (23%).

Estimates show that there has been a slight decrease in companies with a turnover of more than £100,000 over the last two years, with an increase in the number of companies with a turnover of less than £50,000.

In-house practitioners were also asked for information about their communications budget.[3]

[2] Practitioners are considerably more likely to answer 'don't know' or 'not stated' about their results from two years ago than for the last financial year. This is probably because they cannot remember beyond the last financial year. To make the results comparable therefore, we have removed answers of 'don't know' and 'not stated' when calculating percentages.

[3] As with the previous question, we have removed answers of 'don't know' and 'not stated' when calculating percentages.

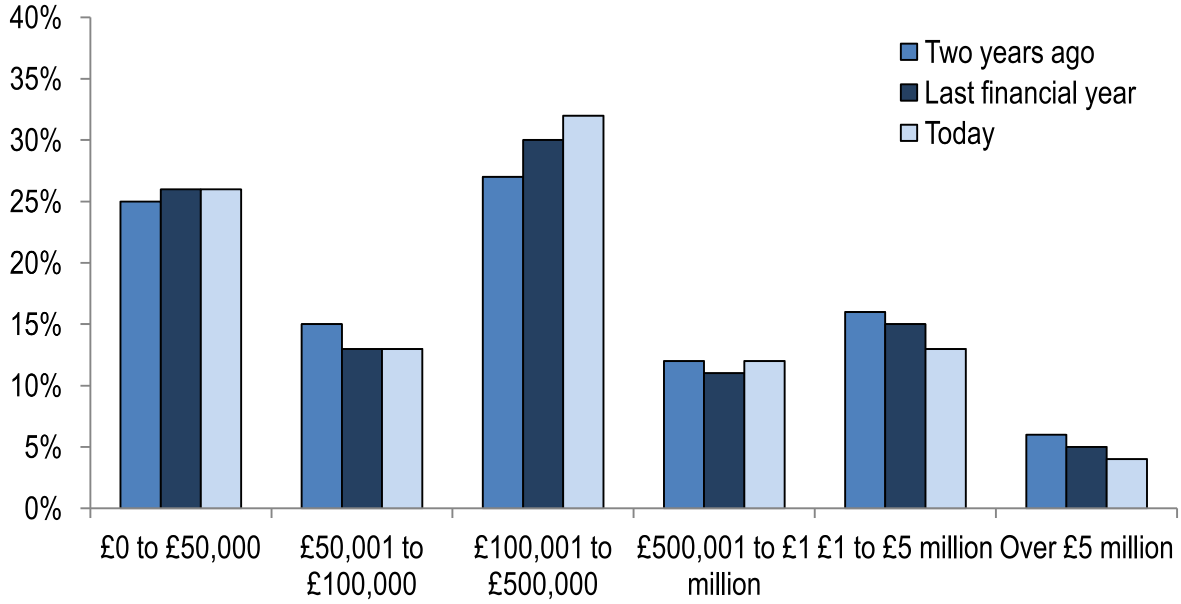


**Fig.3.2a: Communications budgets**
**Base: All In-house practitioners**

Fig 3.2a illustrates that there has been a slight decrease in the number of large communication budgets of in-house PR departments over the last two years. Whereas two years ago, 22% of in-house communication budgets were more than £1 million, today just 17% of budgets are. As a result, there has been an increase in mid-size communications budgets, with 32% of budgets today in the range of £100,001 to £500,000, compared with 27% of budgets two years ago.

This suggests that the economic downturn has led to a contraction among in-house communications budget. A breakdown of these results by employer highlights which types of organisation have been most affected by this.

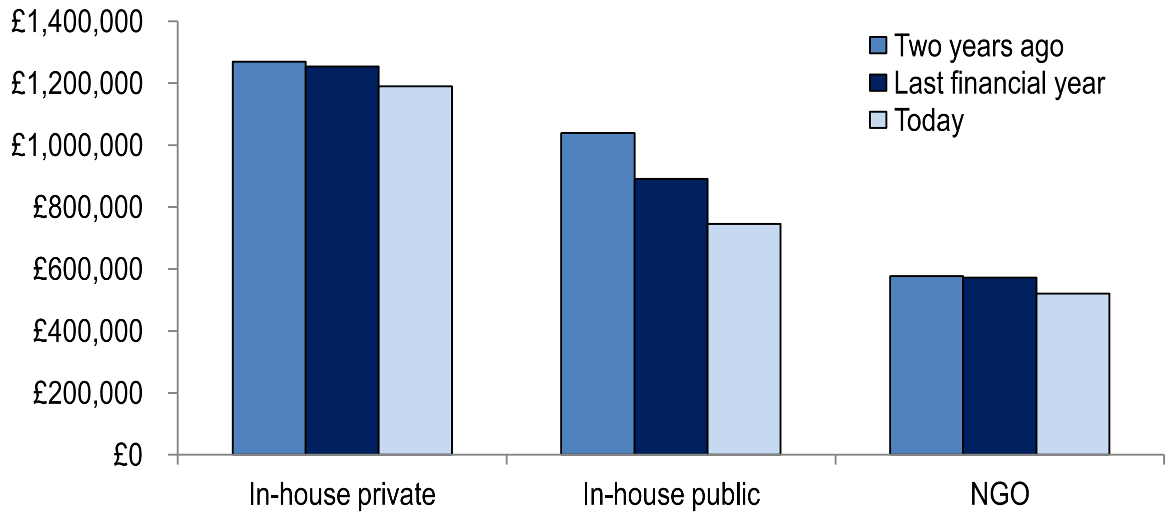


**Fig.3.2a: Average communications budgets**
**Base: All in-house practitioners by employer type**

As might be expected, public sector communications budgets have seen the biggest decreases over the last two years. The average in-house public budget is now £746,000, compared with £1,039,000 two years ago. This reflects most of the overall decrease among communication budgets, with those of private companies and NGOs relatively unaffected in comparison.

Leading on from this, it is valuable to look at the salaries of practitioners.

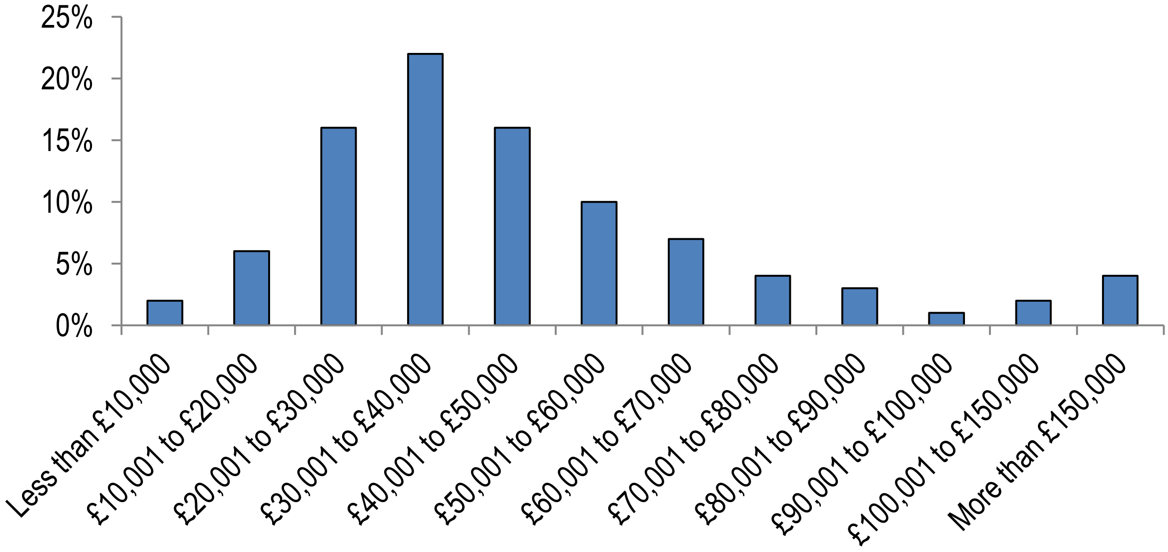


**Fig.3.3a: Salaries**
**Base: All practitioners**

The greatest percentage of practitioners (22%) earn between £30,001 and £40,000. The results of this question have been measured by employer type, with the average wage for each type displayed below.

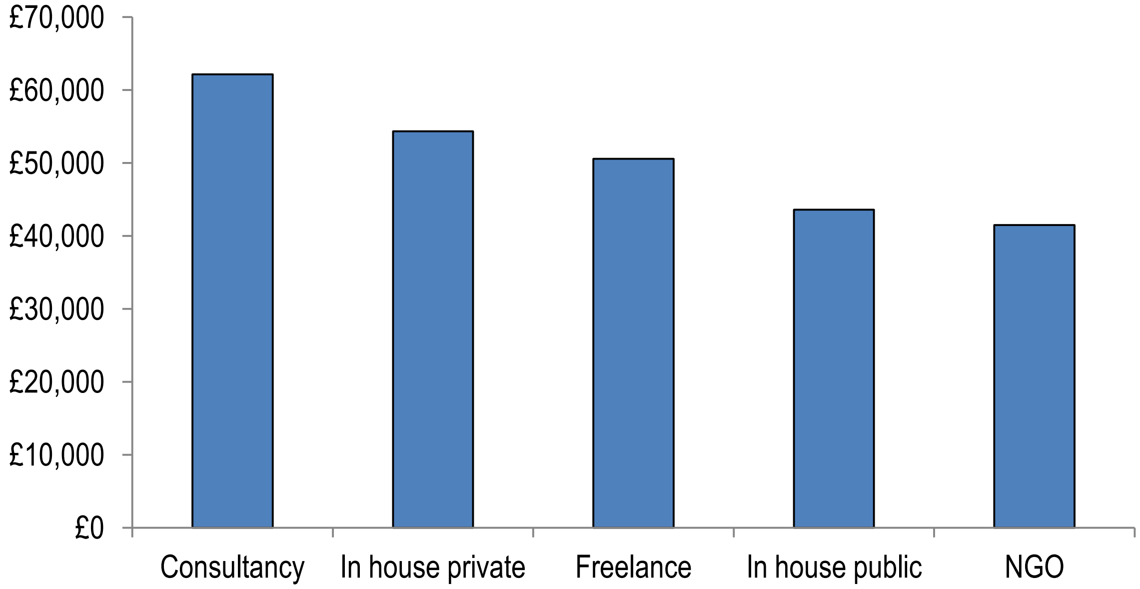


**Fig.3.3b: Mean salaries, by employer**
**Base: All practitioners**

Unsurprisingly, consultancy, private sector and freelance salaries tend to be higher than either public sector or not-for-profit or NGO organisations. The average wages for consultancy, private sector and freelance practitioners are all above £50,000, compared to £43,600 in the public sector and £41,500 at NGOs.

This question has also been broken down by gender.

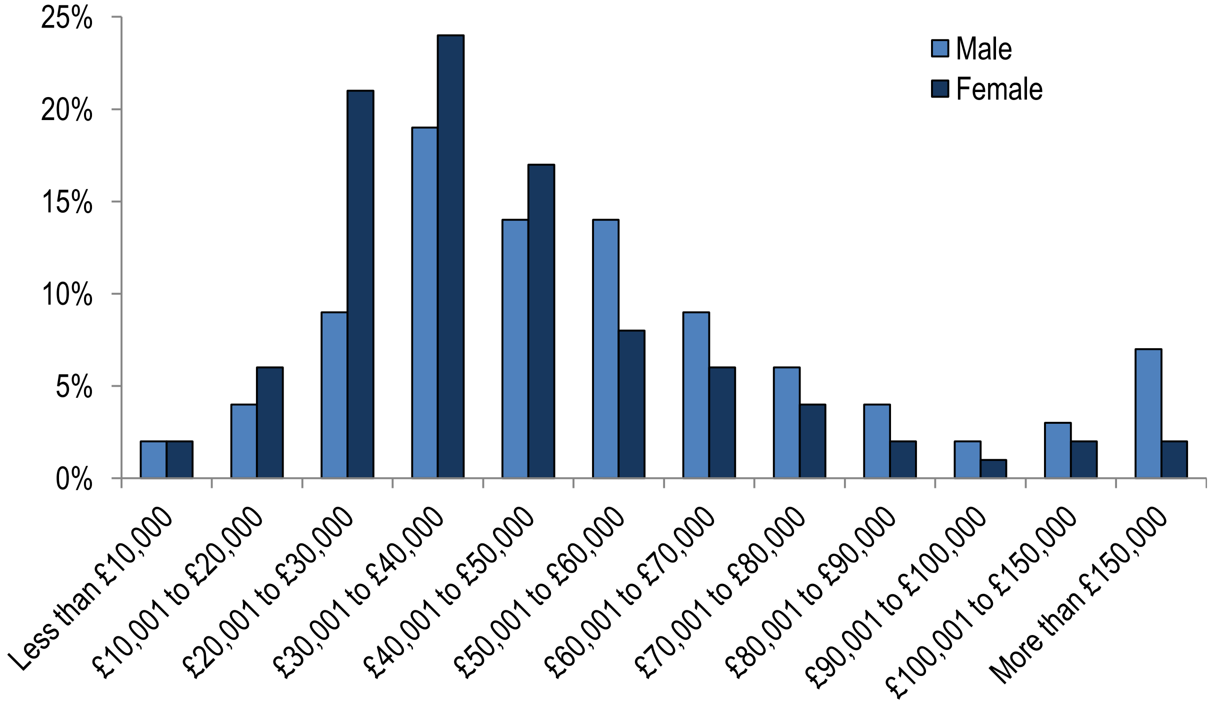


**Fig.3.3c: Salaries, by gender**
**Base: All practitioners**

Interestingly, men in the PR profession are far more likely to be earning a high salary than women, with 45% of men in the profession earning a salary in excess of £50,000, compared to 25% of women. This is linked to the fact that men in the PR profession are more likely to be both older and in more senior positions than women.

## 4. COMPANY PROFILE

In order to measure the size of an in-house PR team, in-house practitioners were asked how many employees are employed by the organisation in which they work. Fig.4.1 illustrates the size of an organisation and the size of their PR teams.

| | | | Number of employees in organisation | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | **Total** | **0 to 5** | **6 to 10** | **11 to 15** | **16 to 20** | **21 to 25** | **26 to 100** | **101 to 250** | **251 to 500** | **More than 500** |
| Number of employees in PR | **Sample size:** | 984 | 10 | 30 | 15 | 14 | 12 | 125 | 100 | 120 | 568 |
| | **0 to 5** | 45% | 100% | 93% | 80% | 100% | 92% | 78% | 61% | 55% | 25% |
| | **6 to 10** | 18% | | 7% | 7% | | | 14% | 25% | 21% | 19% |
| | **11 to 15** | 9% | | | 7% | | | 2% | 7% | 7% | 12% |
| | **16 to 20** | 6% | | | | | | 2% | 2% | 6% | 8% |
| | **21 to 25** | 6% | | | | | 8% | | 3% | 4% | 8% |
| | **26 to 100** | 11% | | | | | | 4% | 1% | 5% | 18% |
| | **101 to 250** | 2% | | | | | | | 1% | | 4% |
| | **251 to 500** | 2% | | | | | | | | | 4% |
| | **More than 500** | 2% | | | | | | | | | 3% |

**Fig.4.1: Number of employees and the size of their PR team**
**Base: All in-house practitioners**

The table above illustrates the size of the PR team working within an organisation. From this table we can see that 63% of all respondents work in teams of fewer than 10 people. Of the respondents who work for large organisations (more than 500 employees), 44% work in a PR team of fewer than 10 people, while 18% worked in teams of between 26 and 100. In-house PR teams generally remain small regardless of the size of their organisation.

Practitioners operating in-house were then asked to state the sector in which *their organisation* operates most frequently.

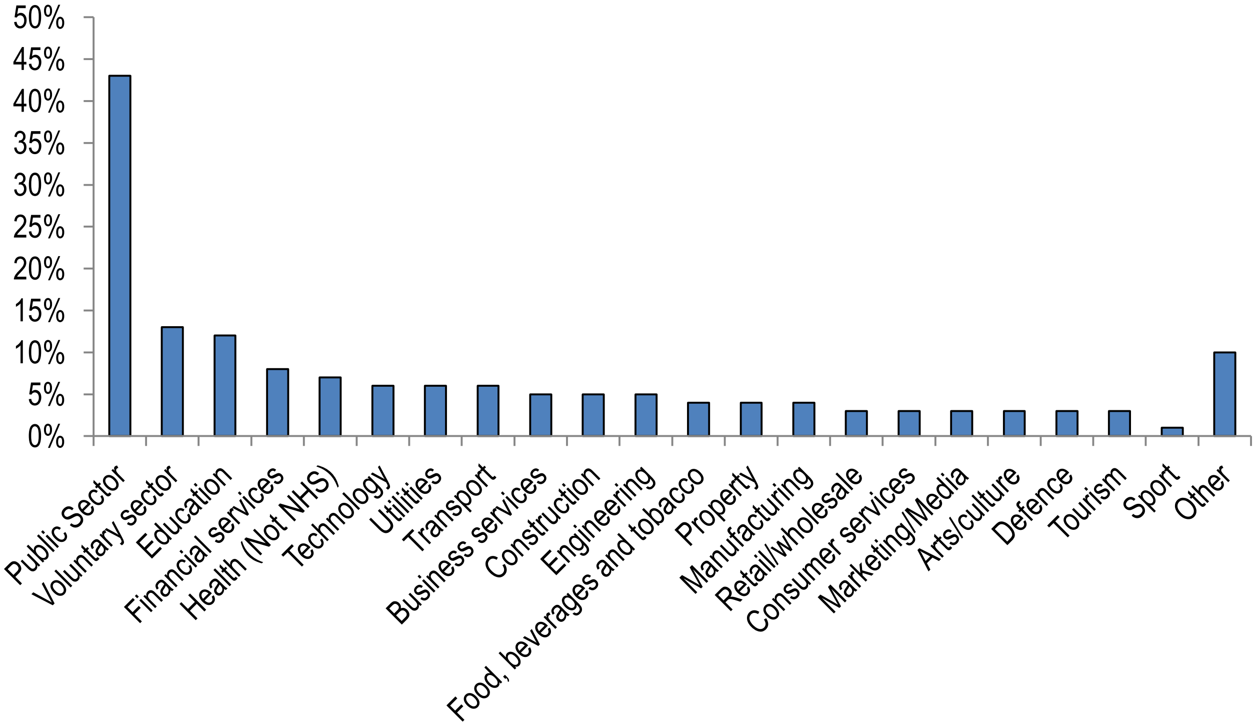


**Fig.4.2: Sector where organisation does most of its work**
**Base: All in-house practitioners**

By far the largest pecentage of PR practitioners who are employed in-house are operating in the public sector (43%). This is skewed somewhat by the responses of public sector practitioners (77%), who, as one might imagine, are considerably more likely than either NGO (20%) or private sector (8%) practitioners to do most of their work in the public sector.

NGO practitioners (53%) are most likely to do most of their work in the voluntary sector, while private sector practitioners are most likely to say financial services (18%).

Sport was selected as the least common (1%). One in ten (10%) selected 'other' as a response to this question.

Leading on from the previous question, practitioners working as part of a consultancy or agency were also asked to disclose the sector in which *their organisation* operates most frequently.

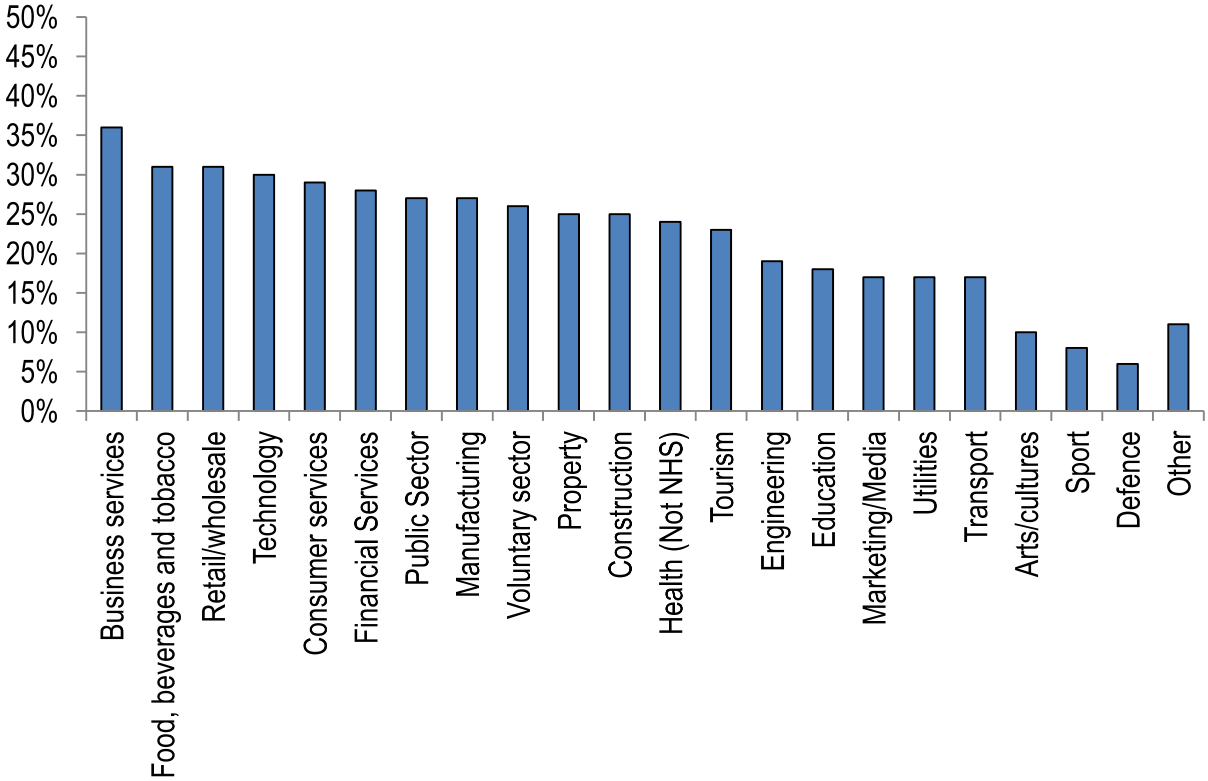


**Fig.4.3: Sector where organisation does most of its work**
**Base: All consultancy / agency practitioners**

Consultancy practitioners are likely to do most of their work in the business services sector (36%). This represents an interesting shift from last year, when consultancy practitioners were most likely to do most of their work in the public sector (38%). This year, just 27% do most of their work in the public sector, reinforcing the downscaling of PR in this area.

The geographical location of clients has been examined, as can be seen in Fig.4.4. This summarises where clients are located.

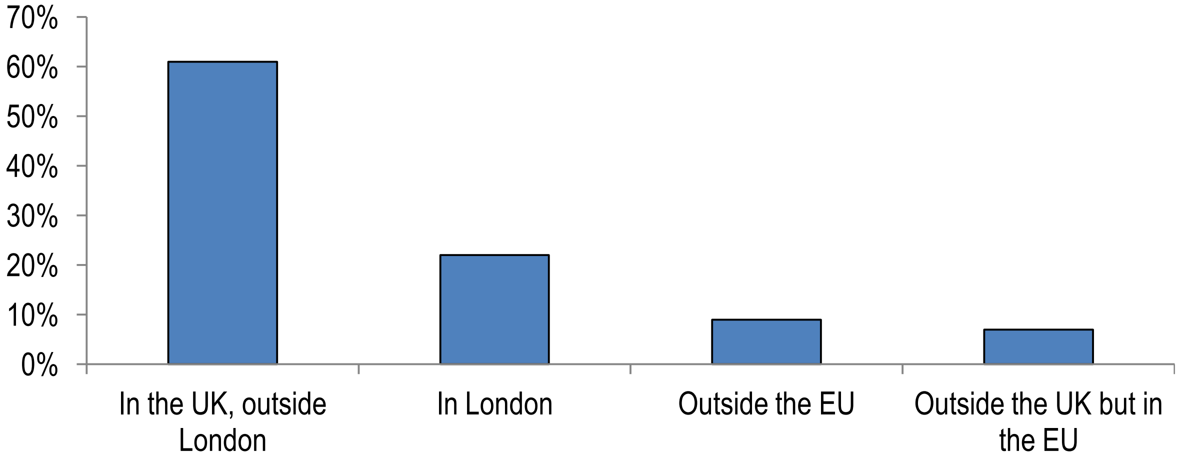


**Fig.4.4: Geographical location of clients**
**Base: All practitioners**

London, although important, does not hold the monopoly on PR clientele (22%). Three fifths (61%) of all PR practitioners' clients are based outside of London but within the UK. This is in line with overall CIPR membership figures which show two thirds of members are based outside of London.

PR practitioners were also asked whether they had a position on the board of their organisation. 9% of practitioners say that they do, while 91% who say they don't. The results of this question have been measured by the gender of practitioners.

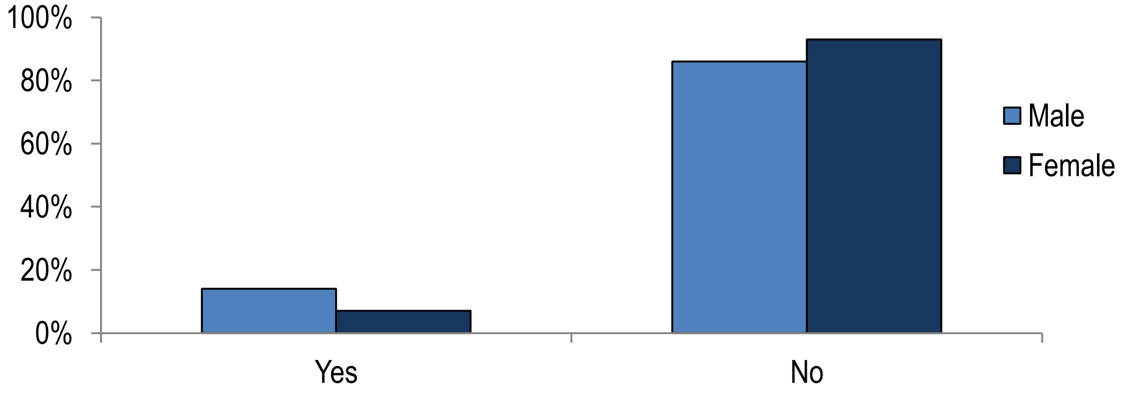


**Fig.4.5: Position on the board of organisation, by gender**
**Base: All practitioners**

Male PR practitioners are far more likely (14%) to be a member of their organisation's board compared to their female colleagues (7%).

The 91% of PR practitioners who do not have a position on the board of their organisation were then asked if there are any communications professionals on the board.

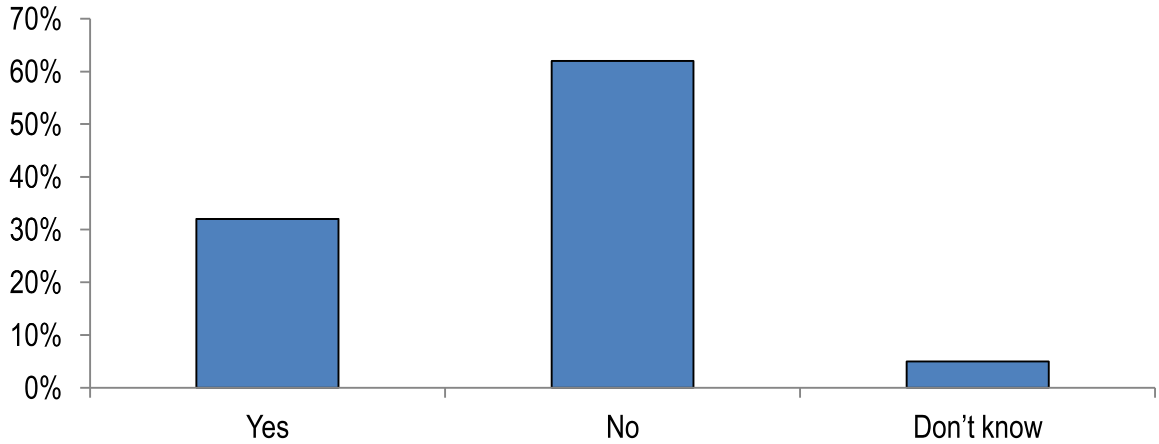


**Fig.4.6: Communications professionals on the board**
**Base: All practitioners who do not sit on the board**

Fig 4.6 illustrates that 32% of PR practitioners who are not on the board of their organisations state that there is still a communications professional on the board of their organisation.

## 5. PERKS OF THE JOB

Following the significant amount of media spotlight falling onto the bonus culture which prevails through many sectors, it is interesting to ask PR practitioners in different sectors if they receive a bonus.

PR practitioners are more likely not to receive a bonus (62%). However, more than a third (36%) of PR practitioners do receive a bonus.

The 36% of respondents who said that they do receive a bonus were then asked how much, as a percentage of their salary, they received in bonuses, with the average answer given as 13%.

Practitioners were asked to give further details regarding the availability of other benefits from their organisation.

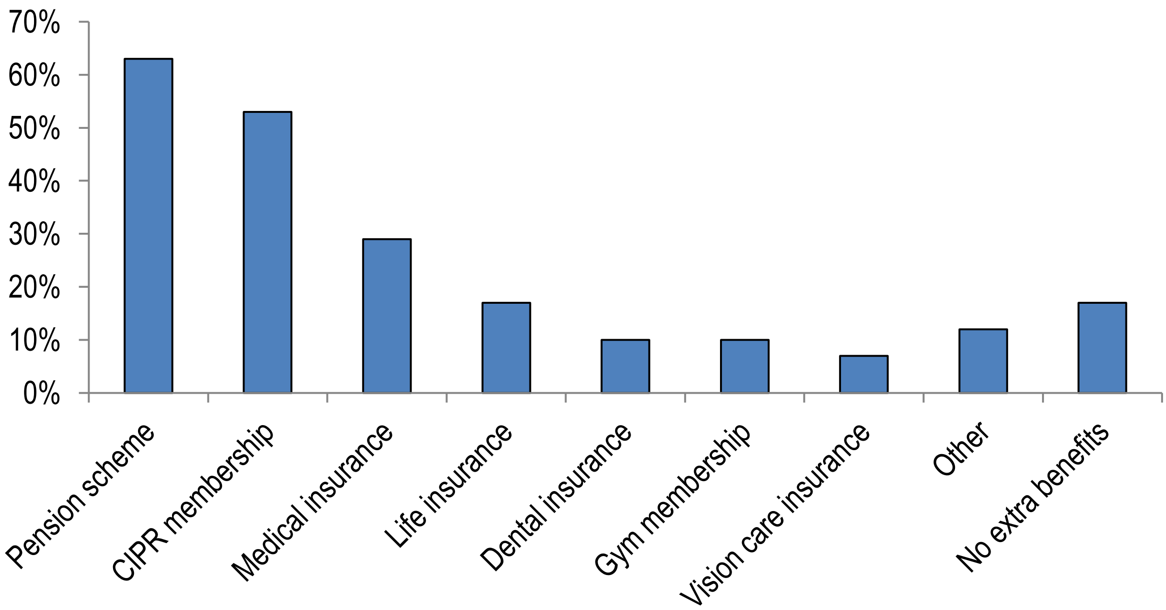


**Fig.5.1a: Provision of benefits**
**Base: All practitioners**

PR practitioners are most likely to receive a pension scheme out of the benefits listed in Fig 5.1a from their organisation (63%). CIPR membership is the second most available benefit to PR practitioners (53%), which suggests that membership is highly valued in PR organisations.

The results of this question have been measured by employer type.

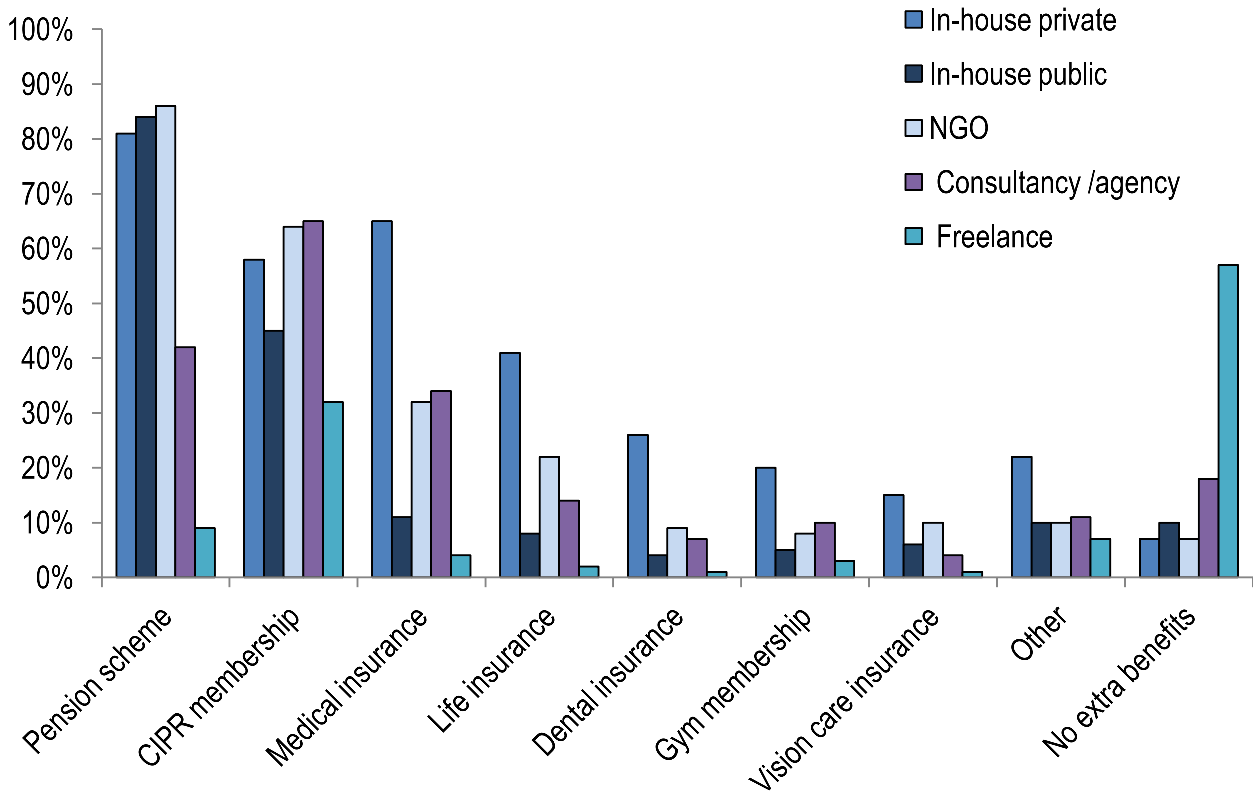


**Fig.5.1b: Provision of Benefits, by Employer**
**Base: All Practitioners**

It is worth noting that practitioners from the public sector (45%) are the least likely to have CIPR membership as a benefit.

## 6. DIVERSITY

The CIPR monitors the diversity of its membership on an on-going basis, through surveys of its membership and the membership application process.

CIPR surveys provide a snapshot of particular strands of diversity. In December 2009 we focused on ethnicity, age and disability. In 2010, we focused on gender, gender pay and roles within the profession. In 2011 we have again focused upon gender, gender pay and roles within the profession.

In both 2009 and 2010 our benchmark tracker has shown that 65% of PR practitioners are women. In 2011, 63% of PR practitioners are women. This, again, is in line with the 2005 CEBR study which found almost two thirds of the industry to be comprised of women, in comparison to 46% for the UK workforce as a whole. These latest results confirm that the PR profession is predominantly female.