

PR and Communications Census 2023 | US



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FOREWORD

By **JAMES HEWES MPRCA**
CEO, PRCA

“New technology is undeniably disruptive: it will require our industry to act ever more ethically and transparently, to reconsider a number of its workflows and practices, and to make the case perhaps in a different way for the value generated by its work.”

This is our second analysis of the PR industry in the US and we have taken a slightly different approach this time around. We have sought out senior practitioners in our survey, and therefore this report gives us the mood from the C-suite. At a time when the challenges facing the industry are increasingly strategic, economic and technological, this seems to us to be the right approach.

There is a great deal of consensus about the challenges currently facing our industry. Despite strong growth in the economy, budget cuts are our leaders' number one concern. This may be due to uncertainty arising from turbulent change to the media landscape. And the industry is not yet comfortable with navigating through the whirlwind of technological change. Artificial intelligence (AI) is seen by most as posing a risk, reducing demand for the industry's services.

New technology is undeniably disruptive: it will require our industry to act ever more ethically and transparently, to reconsider a number of its workflows and practices, and to make the case perhaps in a different way for the value generated by its work. The answer may lie in front of us: 'reputation management' remains at the core of our offer. After a year in which there have been some famous episodes that have rocked corporate

reputations, the value of public relations should be clearer than ever. There will be an important role, as AI develops, for our industry to be the conscience through which citizens' and consumers' trust can be earned.

Findings on diversity and inclusion indicate some progress, but with much more work still to do. Less positive are the signs that little progress has yet been made in ensuring that standards in evaluation are where they need to be. There is a paradox in that dealing well with AI may equip us to finally tackle this properly.

But our general impression is of an industry that is realistic and ready to face the future; that is aware of its impact on and duty towards society. Public relations has reinvented itself twice already in this decade: showing the critical importance of effective communication during COVID-19, and helping society recover. This report suggests that in reacting to new technology, PR will need to think strategically to create a new future. The industry has a strong record of doing exactly that.

Thank you to the many PRCA members and partners who have supported us in the production of this report. We hope you will find it useful.

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METHODOLOGY

The 2023 PRCA U.S. PR Census is based on a sample of 112 senior PR professionals (from account / comms director level and above) from across the region, with data gathered between September and December 2023. The online

survey was created by Perspectus Global and was distributed via the social channel of the PRCA, and Perspectus Global - and sent to the database of the USC Annenberg Centre for PR

Introductions

This year's U.S. Census on the PR and Communications sector marks a shift in our approach to gathering insights. Unlike previous years, where our surveys encompassed PR practitioners across all job levels, we focused specifically on senior-level respondents.

This deliberate change offers several advantages. Firstly, senior leaders wield substantial influence within their organizations, making their perspectives particularly valuable for understanding industry trends and challenges. Additionally, by narrowing our focus, we can delve deeper into the strategic decisions and perspectives that shape the PR landscape.

Lastly, insights from senior-level professionals provide a clearer picture of the industry's future trajectory, guiding us towards informed strategies and solutions. This targeted approach ensures that our findings are not only comprehensive but also actionable, driving meaningful change within the PR and Communications sector.



“The PRCA census reveals that 45% of industry veterans acknowledge that AI can diminish the human touch in communications.

While this may be true, we still need to nourish our ability to quickly process and act upon information in real time.”

The Hollywood sign looms large on the hillside here in Los Angeles, a reminder of a not-too-distant, analog past where publicists controlled the messages, gossip editors ruled the airwaves, and the red carpet was the walkway that divided the famous from the masses.

Today, the masses can become the famous. Those whose voices, opinions and recommendations become the “news.” This makes the role of the communications professional more difficult, nuanced and essential than ever before.

We also have a wealth of cool new tools in our PR toolbox, from SEO to AI. The trick is knowing when, where and how to deploy them in a complex, polarized, political environment. Communicators must understand the issues, be fluent with their stakeholders and thoughtful about their approach.

What does this mean for tomorrow’s communicators? That’s a question our students at the Annenberg School at the University of Southern California intend to answer as the future leaders of our industry.

Our students are embracing the opportunity to master new tools as part of their skill set. And, unlike their older colleagues, they are not afraid of using technology to make their jobs easier and more effective. The PRCA census reveals that 45% of industry veterans acknowledge that AI can diminish the human touch in communications. While this may be true, we still need to nourish our ability to quickly process and act upon information in real time. Our profession will advance by marrying the emerging technological advances with the core skills and principles that lead to successful communication.

FRED COOK MPRCA

**Chair Emeritus, Golin
Director, USC Annenberg Center for PR**

Amidst this evolution, other serious threats loom large, including budget cuts, a shifting media landscape, and disinformation coming from self-proclaimed experts who fuel polarizing conversations. These changes have led to skeptical consumers who analyze and question the authenticity of every message put in front of them. Navigating this discourse can be challenging when opinion is treated as fact — and facts are treated as optional.

From our USC Global Communication Report, we know that senior professionals are spending more time managing social issues, building social currency, and developing social relationships than they did in the past. But times are changing. As woke becomes a four-letter word, the decreasing engagement in social purpose is not surprising. Our student team at the Center of PR dug even deeper to explore whether companies are reversing the trend of sharing information about their efforts in CSR and ESG. It appears that many large companies are reluctant to speak out about anything controversial for fear of alienating their customers and their employees.

Despite this temporary retrenchment, corporate purpose will continue to be an important topic for PR pros over the coming decade. As a student from the ‘70s, who became a corporate leader in the 2000s, I believe the time we devote to doing good will enhance the reputation of our industry and of ourselves for decades to come.



“While AI being perceived as a threat to PR activities by 45% of industry leaders, the forecast for the technology’s impact is overwhelmingly positive.”

This year’s report is a mixed bag, shining a light on the hope that exists when it comes to embracing new technology and moving forward with social purpose, but also reflecting the financial concerns of many industry leaders.

In fact, the standout finding in this year’s report is that budget cuts are seen as the largest threat to the industry by senior leaders. More than half of those polled (53%) said that reduced budgets were a cause of concern for them, putting it top of the list of threats. Whereas in the last Census, reduced budgets came seventh on the list of perceived threats, with 28% of the vote.

These cuts are cited as being a factor behind the falling revenue for giants such as Edelman and WPP, whose respective CEOs have flagged budget reductions in technology, healthcare and financial services.

That these concerns - and cuts - exist despite the strength of the U.S. economy is interesting, and worth watching as this year unfolds.

Another finding of note is that, while AI being perceived as a threat to PR activities by 45% of industry leaders, the forecast for the technology’s impact is overwhelmingly positive. Almost three quarters of respondents

ELLIE GLASON

Managing Director, Perspectus Global

believe that AI will augment existing practices rather than replacing human involvement. It’ll be fascinating to see how the industry adopts AI as the technology evolves.

And finally, the research this year explored social purpose within the industry, and found that 51% of leaders said their organisation promotes genuine corporate social responsibility programmes and actively refuses to engage in greenwashing or astroturfing style campaigns.

Meanwhile, almost a quarter of PR and Comms leaders said they would never again work for a company that didn’t have a robust social purpose mission statement - and 39% are convinced that organizations that don’t have genuine social impact policies will lose out on work in the future.

These are some heartening statistics - but there is room for improvement, and let’s hope they score even higher in next year’s Census.

**STATE
OF THE PROFESSION**

1

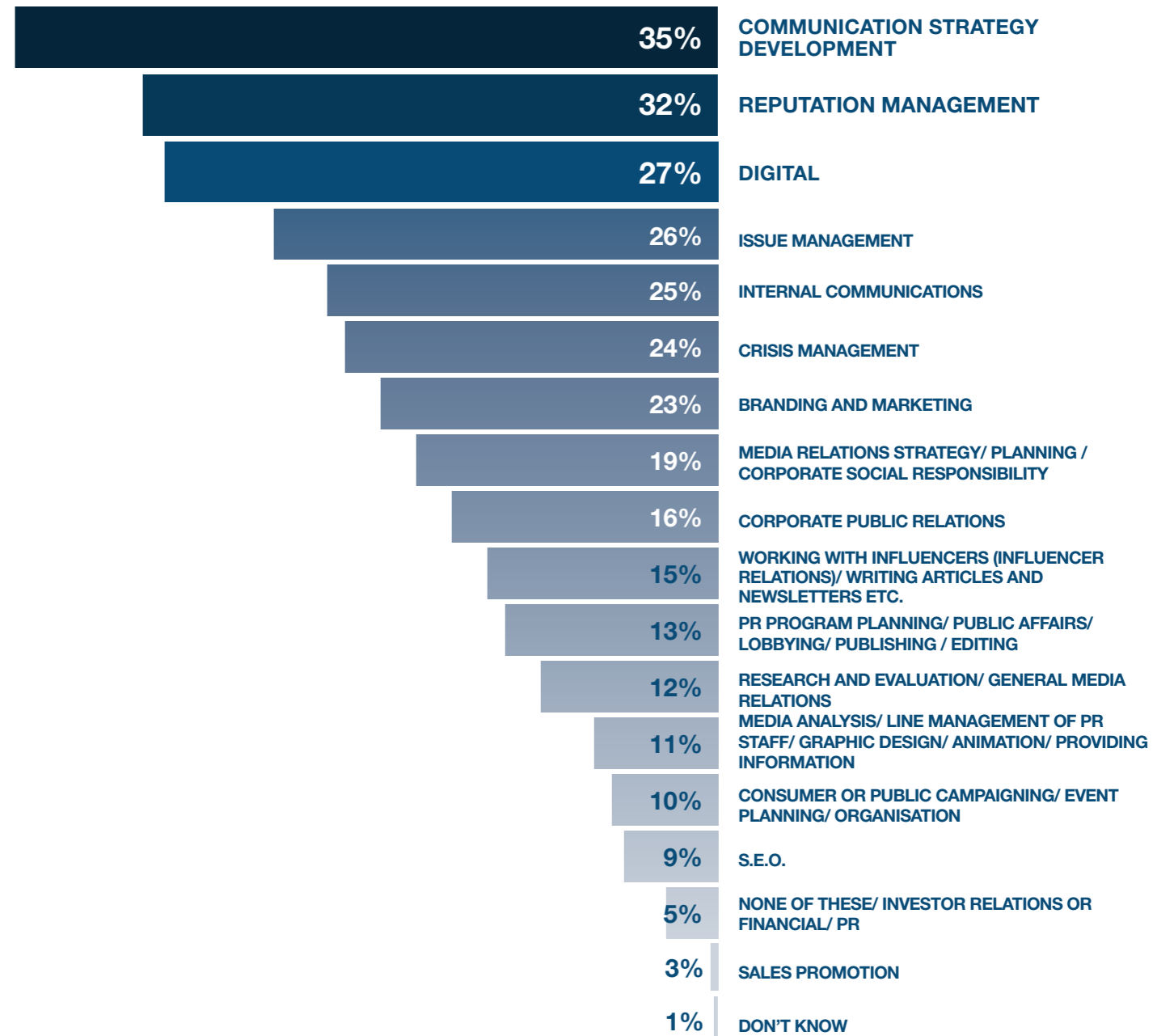
State of the Profession

The PRCA U.S. Census analyzed a range of pertinent issues tied to how the industry is perceived among practitioners and academicians, how it's evolving; and key challenges that must be confronted in the years ahead – particularly in light of the pandemic's aftermath.

CHANGE IN RESPONSIBILITIES

When asked which job functions they are doing more of now as opposed to two years ago, senior level PR practitioners most selected 'communications strategy development' (35%), 'reputation management' (32%) and 'digital' (27%).

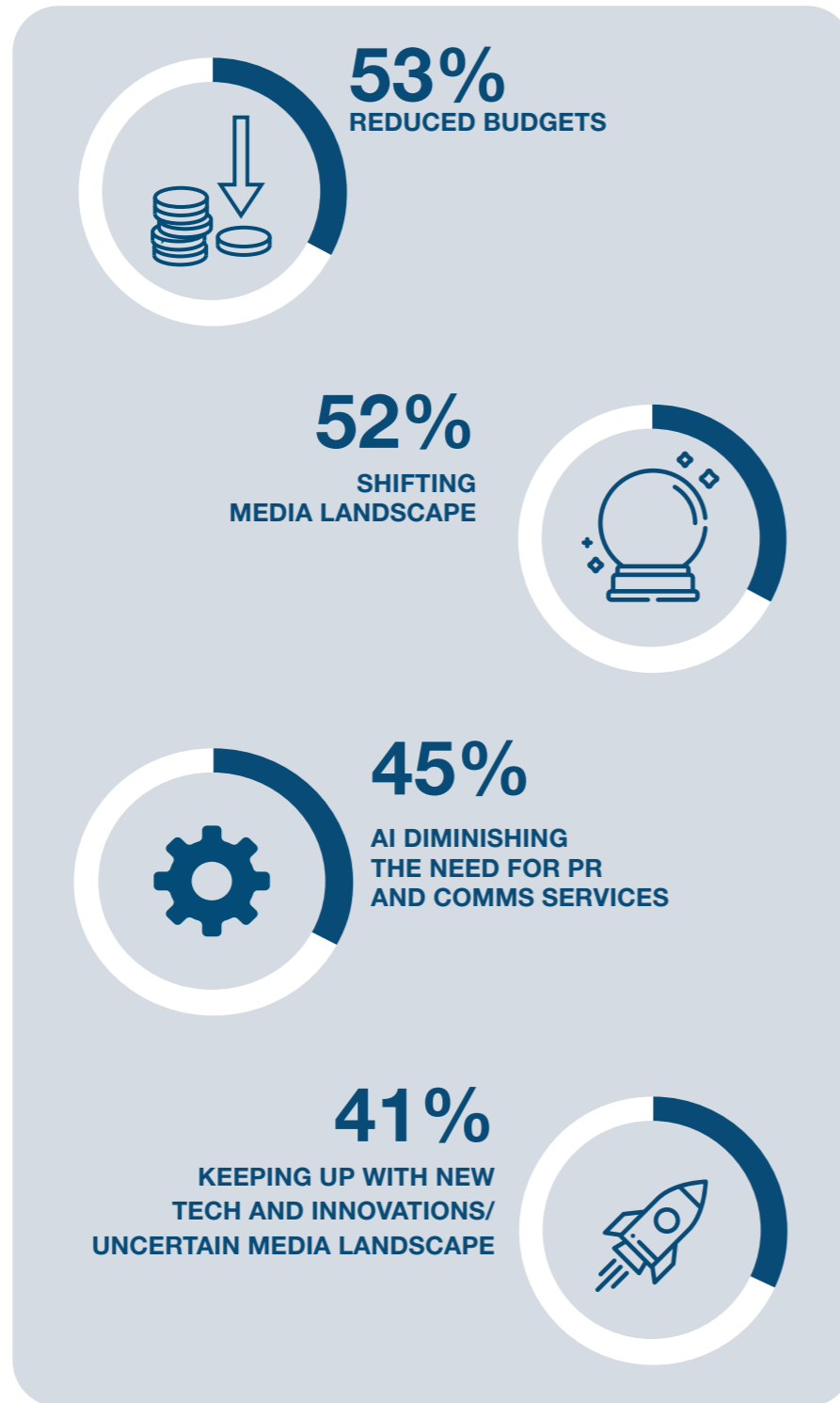
When we asked the same cohort of respondents this question in 2022, 'reputation management' was again the most common response (35%), followed this time by 'internal communications' (30%) and 'issue management' (30%).



THREATS TO PR INDUSTRY

With the ever changing nature of the PR and Communications industry, it is important to understand exactly what senior leaders and decision makers perceive to be the biggest threats to the sector. This year, the biggest perceived threat is 'budget cuts' (53%) - however in 2022 budget cuts came seventh on the list, with just 28% of the vote.

Other leading threats include 'shifting media landscape' (52%) - which came first in 2022 with 39% -and 'AI diminishing the need for PR and Comms' (45%) - which didn't figure in the 2022 Census.

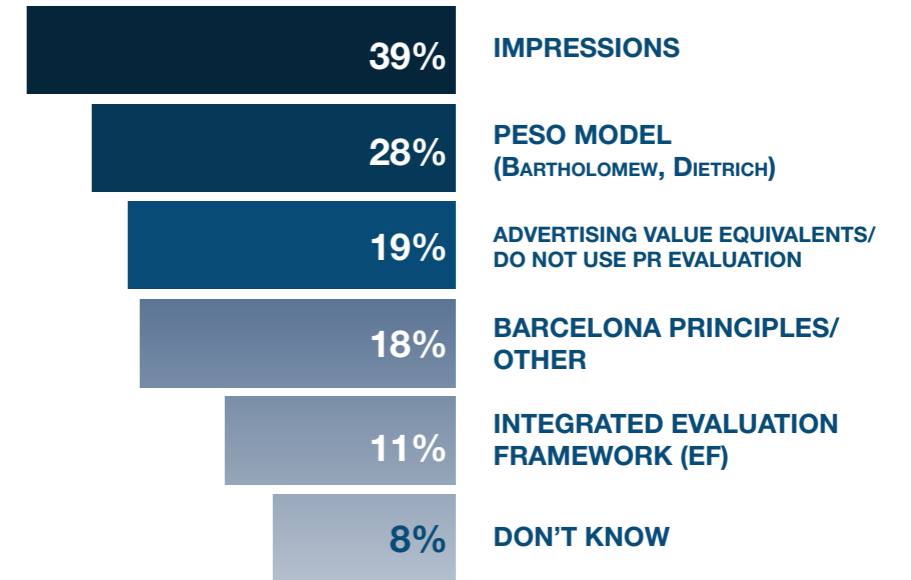


EVALUATION METHODS IN WORK

Assessing the efficacy of public relations is a fundamental aspect of industry practice. As a result, we asked senior level respondents which methods they use to track this information.

This is particularly noteworthy as the level of respondents in this study are often decision makers within their organizations and as such, determine the predominant evaluation methods used.

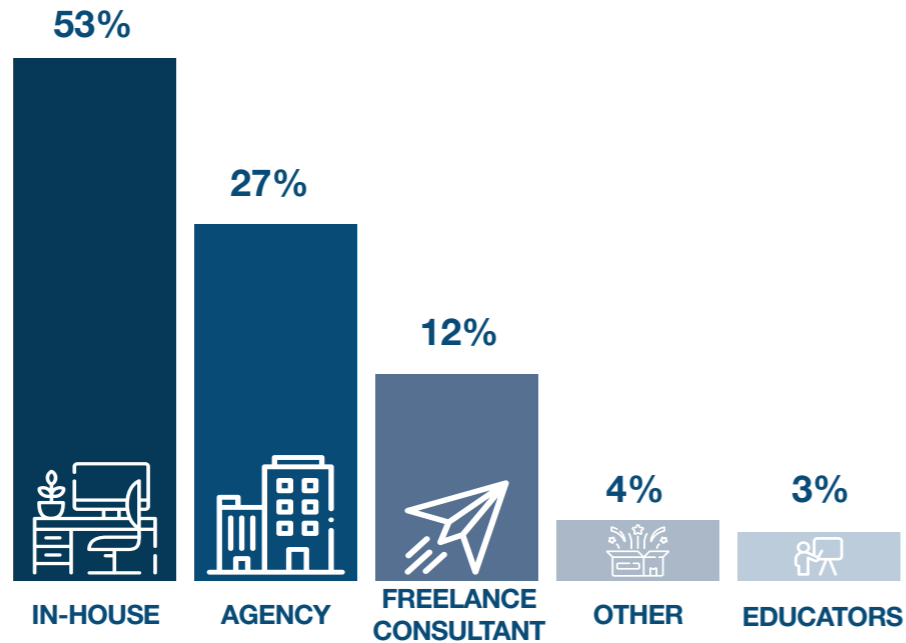
Subsequently, the primary evaluation methods in 2023 were 'Impressions' (39%), 'PESO' (28%) and 'Advertising Value Equivalents' (19%). Interestingly, 19% of respondents also stated that they 'do not use PR evaluation methods' and eight percent said they 'don't know' which methods they use.



PR ORGANIZATION REVIEW

80% of senior level U.S. Census respondents perform public relations work either in-house (53%) or as employed by a public relations/communications agency (27%).

The remaining 20% of senior level respondents work as a freelancer or independent PR/communications consultant (12%), as educators in the field of public relations (3%), or selected 'other' for their organizational category (4%).



ASSESSING AI RELATED CONCERNS IN PR AND COMMUNICATIONS

Recent advancements in AI technology have had a significant impact on working methods across all industries.

The PR and Communications sector in particular has many uses for such technologies. Subsequently, we asked senior level PR practitioners to share their observations of the potential risks and limitations associated with heavy reliance on AI.

Most respondents display a level of concern (70%), with 48% being 'somewhat concerned' and 22% being 'very concerned'. Meanwhile, 15% were 'not very concerned' and the remaining 15% were 'neutral'.

Ultimately, over-reliance on AI could undermine PR practices. Such technologies should be used to enhance or streamline working practices, with the foundation stemming from PR practitioners themselves.

70%

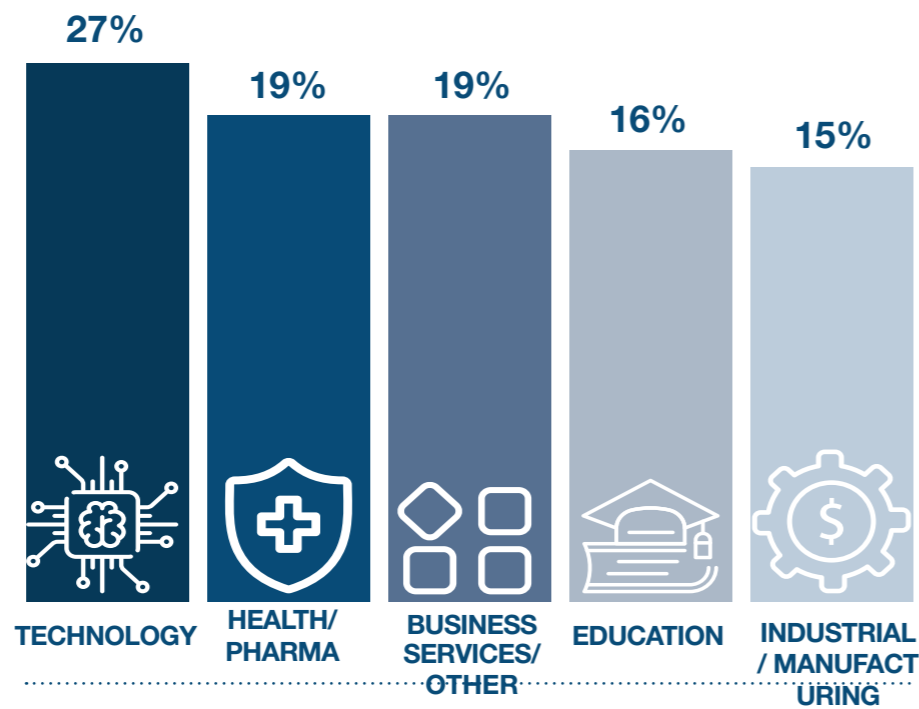
MOST RESPONDENTS DISPLAY A LEVEL OF CONCERN



- 48% Somewhat concerned
- 22% Very concerned
- 15% Not very concerned/ Neutral

CLIENT AREAS OF WORK

Public relations organizations exhibit considerable diversity in the industries they serve, whether in-house or on the agency side working with clients. The leading industry that senior level PR practitioners work for in the US are the 'technology' sector (27%), as well as 'health/ pharmaceutical', 'business services' and 'other' options which were not listed, all of which were tied at 19%.



THE LEADING INDUSTRIES THAT PR PRACTITIONERS WORK FOR

STRATEGIZING TOMORROW: AI INTEGRATION IN PR AND COMMUNICATIONS

Following on from the previous section, we asked respondents how they envisioned the future of PR and communications with the increasing integration of AI technologies.

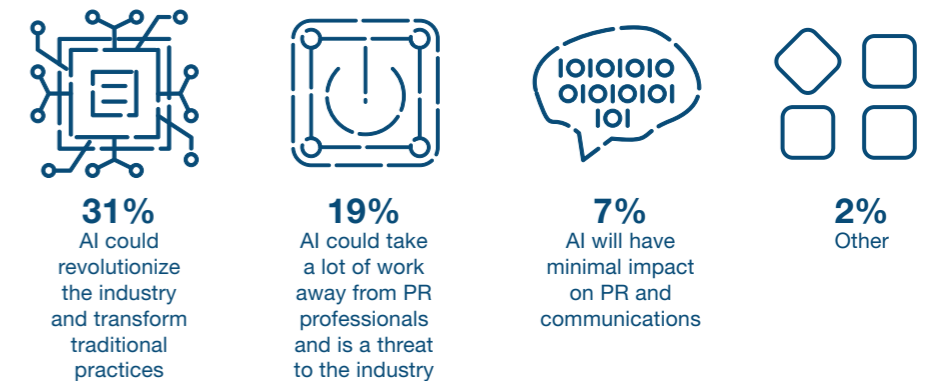
74% of respondents said that 'AI could augment existing practices but not completely replace human involvement', whilst 19% disagreed and said, 'AI could take a lot of work away from PR professionals and is a threat to the industry'.

In addition, 31% said that 'AI could revolutionize the industry and transform traditional practices', whilst 7% said 'AI will have minimal impact on PR and communications'. options which were not listed, all of which were tied at 19%.



74%

AI COULD AUGMENT EXISTING PRACTICES BUT NOT COMPLETELY REPLACE HUMAN INVOLVEMENT



2

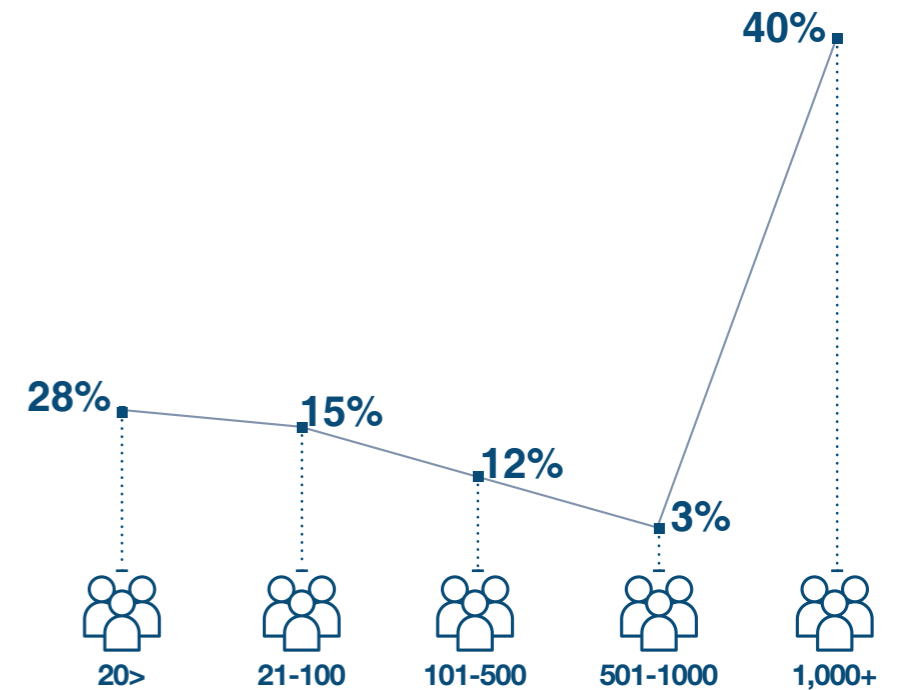
**DIVERSITY
AND INCLUSION REVIEW**

Diversity and Inclusion Review

The ability for the PR industry to serve clients, employers and organizations best hinges in part on the composition of the industry including and reflecting society at-large across a full gamut of diversity measures that can inherently impact proper understanding and sensitivities to stakeholder groups, societal issues, challenges, opportunities and strategic best-practices.

SIZE OF EMPLOYER

The largest segment of senior level respondents (40%) work for an organization of 'More than 1,000' employees in the US. 28% work for an organization with 'under 20' employees, 15% have 'under 100 employees', 12% have 'under 500 employees' and 3% have 'under 1000 employees'.

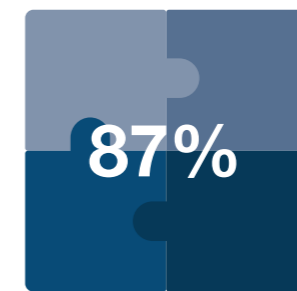


DOES WORK ENVIRONMENT PROMOTE DIVERSITY?

We asked senior level PR practitioners if their work environment actively promotes diversity. The majority of sentiments shared by respondents portray a positive outlook for diversity and inclusion within the PR and communications sector in the US.

87% said that their workplace 'actively promotes diversity', with 55% selecting 'yes, very much so' and 32% selecting 'yes, moderately so'. Another eight percent, however, selected 'neither yes nor no' and three percent selected 'no, not really'.

Concerningly, two percent of senior level respondents selected 'no, definitely not'. This is up on the 0.4% who answered 'no, definitely not' in 2022.



U.S. PR practitioners say that their workplace "actively promotes diversity"

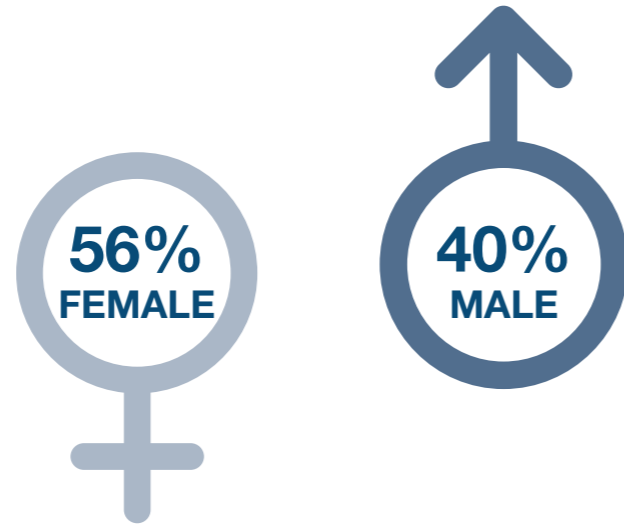


| | |
|-----|--------------------|
| 55% | YES, VERY MUCH SO |
| 32% | YES, MODERATELY SO |
| 8% | NEITHER YES NOR NO |
| 3% | NO NOT REALLY |

GENDER

This year's US Census is particularly noteworthy as we consider gender split at a senior level. Interestingly, 56% of respondents identify as female and 40% identify as male, whilst two percent would 'rather not say' and one percent selected 'other'.

Ultimately, senior leadership roles in PR and communications in the US tend to have more females than males.

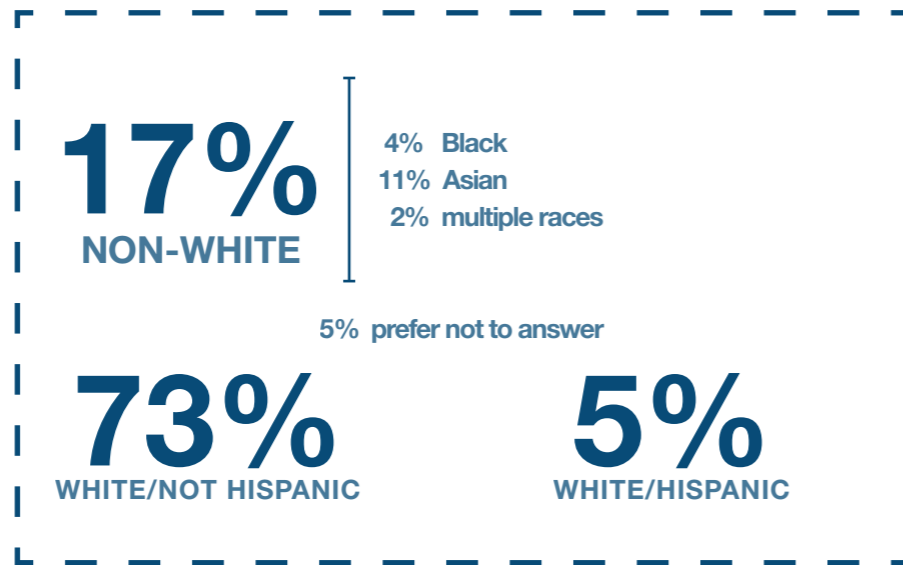


RACIAL/ETHNIC ORIGIN

This year's Census data indicates that most of the U.S. PR industry at the senior level identifies as white (77%). 73% identify as 'white, not Hispanic', whilst five percent identify as 'white, Hispanic'. Other senior leaders identify as 'Asian' (11%), 'Black' (4%) and 'Multiple Races' (2%), whilstwhist five percent 'preferred not to say'.

Comparing this to the 2022 Census, we see that there has not been much change, as the majority (80%) again identified as white (63% 'white, not Hispanic'; 17% 'white, Hispanic').

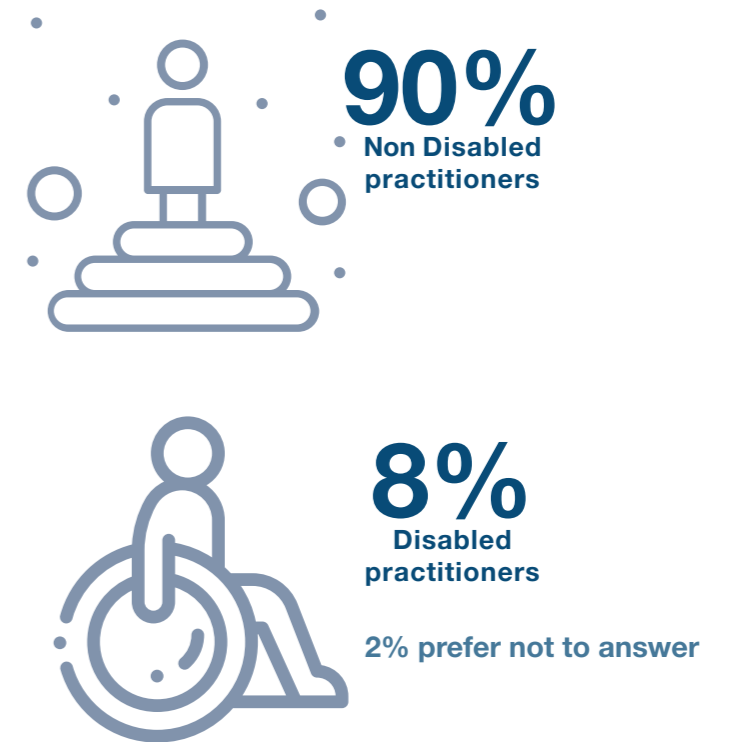
In 2022, 10% of senior leaders identified as 'Black', six percent identified as 'Asian', one percent identified as 'American Indian/ Alaska Native', 0.4% identified as 'Native Hawaiian/ other Pacific Islander', as well as 'multiple races' and three percent 'preferred not to say'.



DISABILITY

90% of senior level PR practitioners said that they 'do not have a disability', whilst eight percent said that they 'do have a disability'.

Two percent preferred not to answer. When compared to 2022's Census, there has been a 11% decrease in the number of senior leaders identifying as disabled.



WORKPLACE RATING

On the question of “How would you rate the following aspects of your current workplace?” senior level PR practitioners were asked to evaluate their workplace across five criteria:

- Quality of physical environment
- Safety of physical environment
- Atmosphere at work in terms of colleague relationships
- Employee attitude towards work
- Senior management attitude towards work

The majority of respondents rated every aspect of their workplace environment as ‘very good’ or ‘good’. There are some fluctuations in the ratings, and this is displayed in the corresponding graphic.

QUALITY OF PHYSICAL ENVIRONMENT



- 44% **VERY GOOD**
- 35% **GOOD**
- 17% **AVERAGE**
- 5% **POOR**

SAFETY OF PHYSICAL ENVIRONMENT



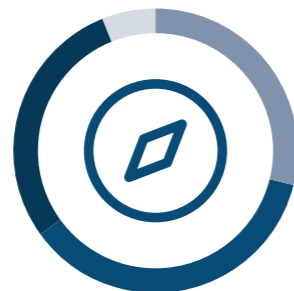
- 58% **VERY GOOD**
- 29% **GOOD**
- 10% **AVERAGE**
- 2% **POOR**
- 1% **VERY POOR**

ATMOSPHERE AT WORK IN TERMS OF COLLEAGUE RELATIONSHIPS



- 39% **VERY GOOD**
- 38% **GOOD**
- 19% **AVERAGE**
- 3% **POOR**
- 1% **VERY POOR**

EMPLOYEE ATTITUDE TOWARDS WORK



- 29% **VERY GOOD**
- 36% **GOOD**
- 29% **AVERAGE**
- 6% **POOR**

SENIOR MANAGEMENT ATTITUDE TOWARDS WORK

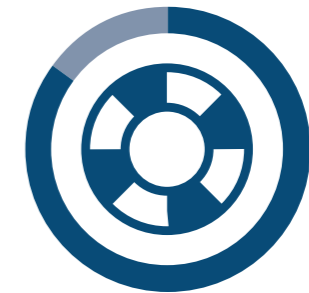


- 32% **VERY GOOD**
- 39% **GOOD**
- 23% **AVERAGE**
- 6% **POOR**
- 1% **VERY POOR**

COMPANY CULTURE

To understand the strategies employed by PR organizations in fostering a positive company culture, we queried senior-level PR practitioners about their practices.

The predominant measures used by PR organizations were ‘encouraging workforce diversity through positive employment practices’ (65%), ‘encouraging philanthropy’ (59%) and ‘promoting genuine corporate social responsibility programmes/communications’ (51%). Nine percent of respondents did, however, select ‘none of the above’ and three percent said they ‘don’t know’.



- 65% Encourages workforce diversity through positive employment practices
- 59% Encourage philanthropy and giving
- 51% Promote genuine corporate social responsibility programmes / communications (and an active refusal to engage in greenwashing or astroturfing style campaigns)
- 26% Meet one of more of the UN Sustainable Development Goals, depending on the campaign being developed and implemented
- 17% Helps all practitioners to understand the social impact of PR and be aware of the actions they are taking - in line with the Helsinki Declaration on the ethics of PR and PRCA Code of Conduct
- 15% “Buys social” and uses social enterprises in the supply chain
- 9% None of the above
- 3% I don't know

SOCIAL PURPOSE IN PR AND COMMUNICATIONS

We asked senior leaders in PR and communications about their organization’s social purpose.

By ‘social purpose’, we meant their organization’s social mission - what they stand for and how they plan to improve the world, both locally and in a wider way.

When asked which options were true to the respondents, the most commonly selected sentiments were ‘It’s important to me that my employer has a transparent, accessible and robust social purpose mission’ (52%), ‘organizations that don’t have genuine social impact policies will lose out on work in the future’ (39%) and ‘my employer measures the businesses social impact in a clear way’ (26%).



52%
IT'S IMPORTANT TO ME THAT MY EMPLOYER HAS A TRANSPARENT, ACCESSIBLE AND ROBUST SOCIAL PURPOSE MISSION

- 39% Organizations that don't have genuine social impact policies will lose out on work in the future
- 26% My employer/ myself (if you're a sole trader) measures the businesses social impact in a clear way
- 23% I wouldn't work for an employer that didn't have a robust social purpose mission statement
- 19% None of the above/ I believe that social purpose should be the focus of communication professionals going forward
- 11% I've changed jobs because my employers weren't committed to social purpose
- 6% I've considered changing jobs because my employers weren't committed to social purpose

**SALARIES
& WORKFORCE**

3

Salaries & Workforce

As the PRCA strives to advocate for the economic interests and fair compensation of the global public relations industry workforce, insights about the U.S.-based industry provide insights into specific realities, issues and challenges that the PRCA will consider, as the organization continues expanding its reach, influence and provision of member benefits.

JOB TITLES

Before proceeding to the salary related section of the US Census, it is important to note that the respondents are comprised of senior level PR practitioners. Respondents were made up of 'Directors' (19%), 'Chairman/ Chief Executives/ Managing Directors' (19%), 'Senior/ Executive Vice Presidents' (11%), 'Vice Presidents' (10%), 'Senior Managers' (10%), 'Board Directors/ Partners' (8%), 'Group/ Divisional Vice Presidents' (8%), 'Head of Units' (5%), 'Senior Executives' (4%), 'Senior Account Directors' (3%) and 'Account Directors' (2%).

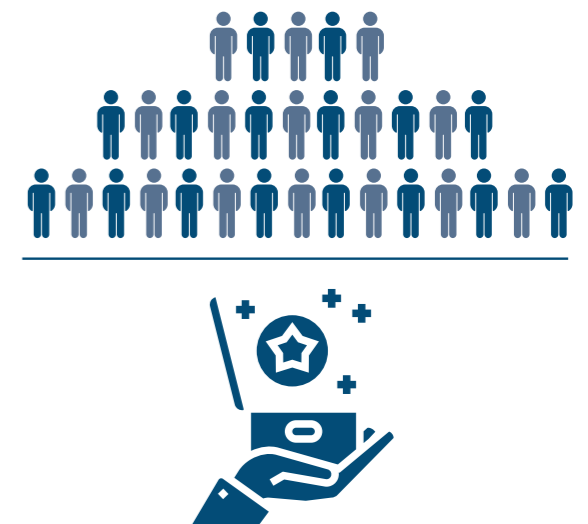


| | |
|------------|---|
| 19% | Director/ Chairman/ Chief Executives/ Managing Directors |
| 11% | Senior/ Executives Vice Presidents |
| 10% | Vice Presidents/ Senior Managers |
| 8% | Board Directors/ Partners/ Group/ Divisional Vice Presidents |
| 5% | Head of Units |
| 4% | Senior Executives |
| 3% | Senior Account Directors |
| 2% | Account Directors |

AVERAGE ANNUAL SALARY

We asked senior level PR practitioners what their average annual salary was in U.S. Dollars before deductions and not including any bonus payments. The average salaries by job title were as follows:

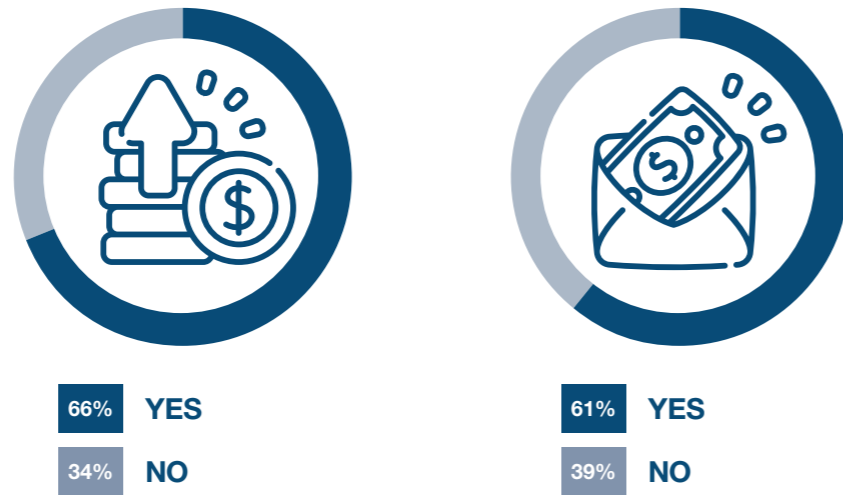
| | |
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| Chairman/ Chief Executive/ Managing Director | \$141,260 |
| Board Director/ Partner | \$149,065 |
| Group/ Divisional Vice President | \$153,537 |
| Senior Account Director | \$125,833 |
| Account Director | \$99,535 |
| Senior/ Executive Vice President | \$242,128 |
| Vice-president | \$250,896 |
| Director | \$157,416 |
| Head of Unit | \$152,921 |
| Senior Manager | \$103,816 |
| Senior Executive | \$95,678 |



PAY RAISE/BONUS IN PAST 12 MONTHS

In answering whether senior level U.S. PR professionals had received a pay rise within the past 12 months, 66% answered that they had, whilst 34% indicated that they had not. Interestingly, the amount of respondents stating that they had a pay rise has regressed by five percent when compared to 2022.

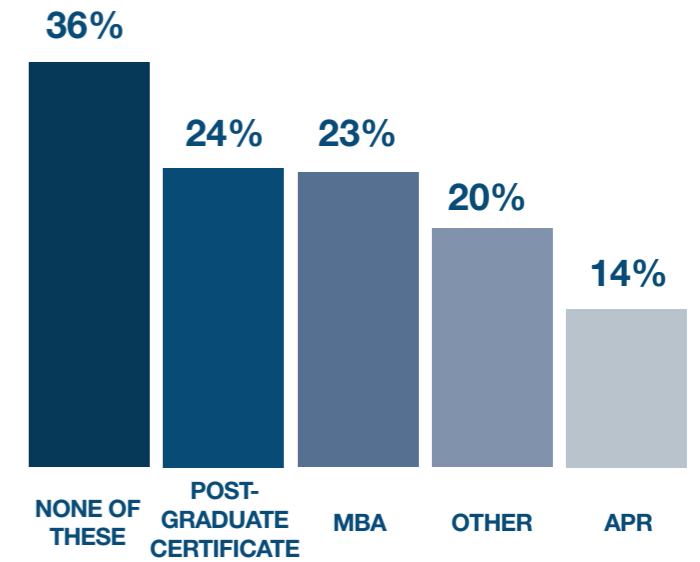
When asked if senior PR leaders in the US had received a bonus payment in the last 12 months, 61% affirmed they had, while 39% stated they had not. Additionally, the prevalence of bonus payments has slightly decreased, with 64% of senior leaders reporting receiving one in 2022.



PROFESSIONAL QUALIFICATIONS

Census participants within the U.S. public relations sector noted a range of diverse professional qualifications closely aligned with their professional responsibilities.

Notably, 36% of senior leaders said that they did not have any of the qualifications that were listed as options. 24% indicated possessing a 'post-graduate certificate', 23% claimed an 'MBA', with 20% opting for 'other', and an additional 14% stating they held an 'APR designation'.



GENDER PAY GAP

Regarding efforts to help eliminate the gender pay gap, 59% of senior leaders in the U.S. PR industry said that they believed their organizations were doing enough to help, whilst 18% answered that their organizations were not, and another 23% answered that they weren't sure.

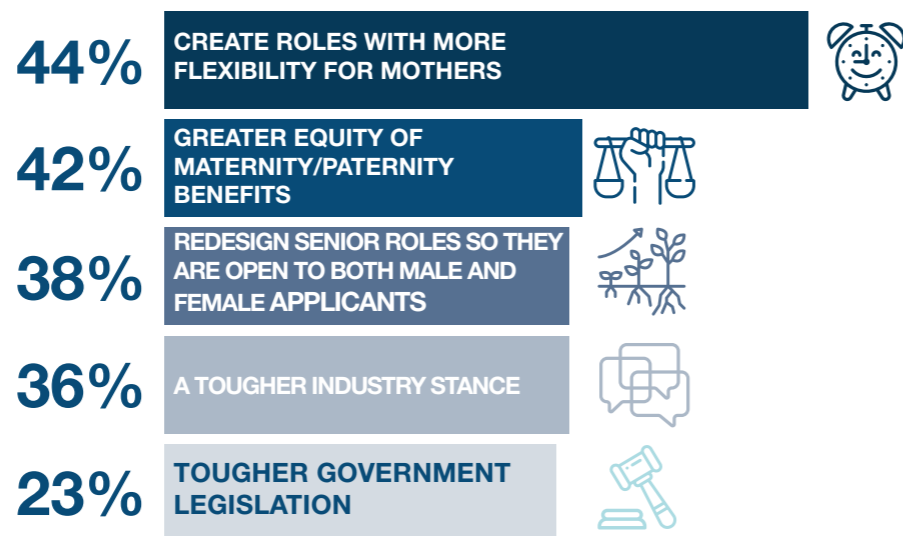
Relative to solutions for the gender pay gap issue, respondents cited the following options by these percentages to indicate a belief that the option "would assist in reducing the gender pay gap in the PR industry":

- 44% — Create roles with more flexibility for mothers
- 42% — Greater equity of maternity/paternity benefits
- 38% — Redesign senior roles so they are open to both male and female applicants
- 36% — A tougher industry stance
- 23% — Tougher government legislation



of respondents said that they believed their organizations were doing enough to help

WHAT DO YOU THINK WOULD ASSIST IN REDUCING THE GENDER PAY GAP IN THE PR INDUSTRY?



CONTRACTED HOURS VERSUS ACTUAL HOURS

Senior-level PR professionals were queried about their contracted and actual weekly work hours. In total, participants reported being contracted for 41 hours per week.

However, they estimated their actual workload to average 49 hours weekly, showcasing a significant additional commitment beyond contractual obligations.



41hrs
per week



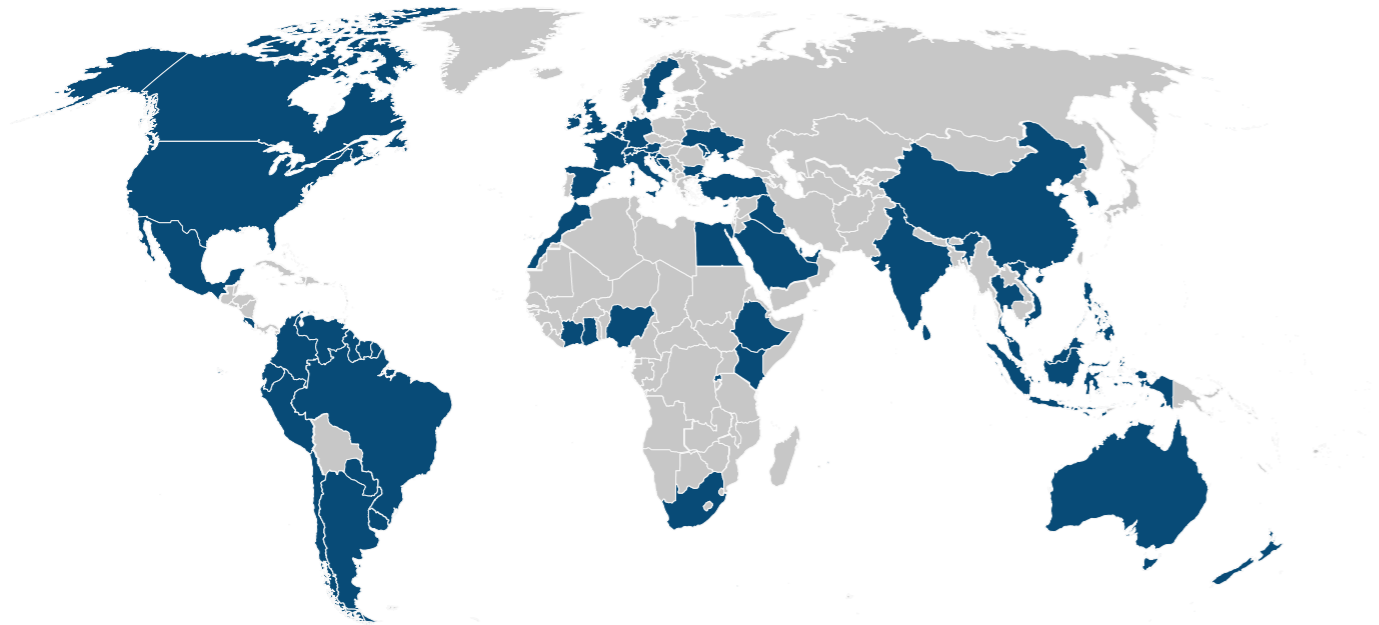
49hrs
per week



CONCLUDING REMARKS



IS THE WORLD'S LARGEST PROFESSIONAL PR ASSOCIATION



35,000+ PR professionals

82 Countries Worldwide

Concluding Remarks

In conclusion, the U.S. PR and Communications Census 2023 provides a nuanced examination of the industry landscape, particularly through the lens of senior level practitioners. The data reveals key insights into the strategic priorities and challenges shaping the trajectory of our profession.

A noteworthy finding is the heightened concern surrounding budgetary constraints despite a robust economic backdrop. This highlights the importance of adept resource allocation amidst the evolving media ecosystem. Concurrently, there is a sense of anticipation and preparedness to leverage emerging technologies, albeit with lingering apprehensions regarding the transformative impact of AI.

The exploration of diversity and inclusion uncovers both strides forward and lingering gaps, highlighting the industry's dedication to cultivating inclusive work environments and impactful social initiatives. Additionally, salary trends and efforts to address the gender pay gap highlights a collective push towards equitable practices within the profession.

In essence, the report portrays a dynamic industry poised to navigate challenges with resilience and innovation. We extend our appreciation to all PRCA members and partners for their invaluable contributions to this research endeavor. These insights should be leveraged to inform strategic decision-making and catalyze positive change within the U.S. PR and Communications sector.

BENEFITS OF BECOMING A PRCA MEMBER

- GLOBAL RECOGNITION AND CREDIBILITY
- INSIGHTS AND RESOURCES TO GROW YOUR BUSINESS
- DISCOUNTED LEARNING AND DEVELOPMENT COURSES EVERY YEAR
- EVENTS AROUND THE WORLD
- INTERNATIONAL COMMUNICATIONS MANAGEMENT STANDARD (CMS)
- YOUR CHANCE TO JUDGE AND CONTRIBUTE TO THOUGHT LEADERSHIP GLOBALLY
- BE PART OF A GLOBAL NETWORK
- LOCAL, REGIONAL, AND GLOBAL PROGRAMMES





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