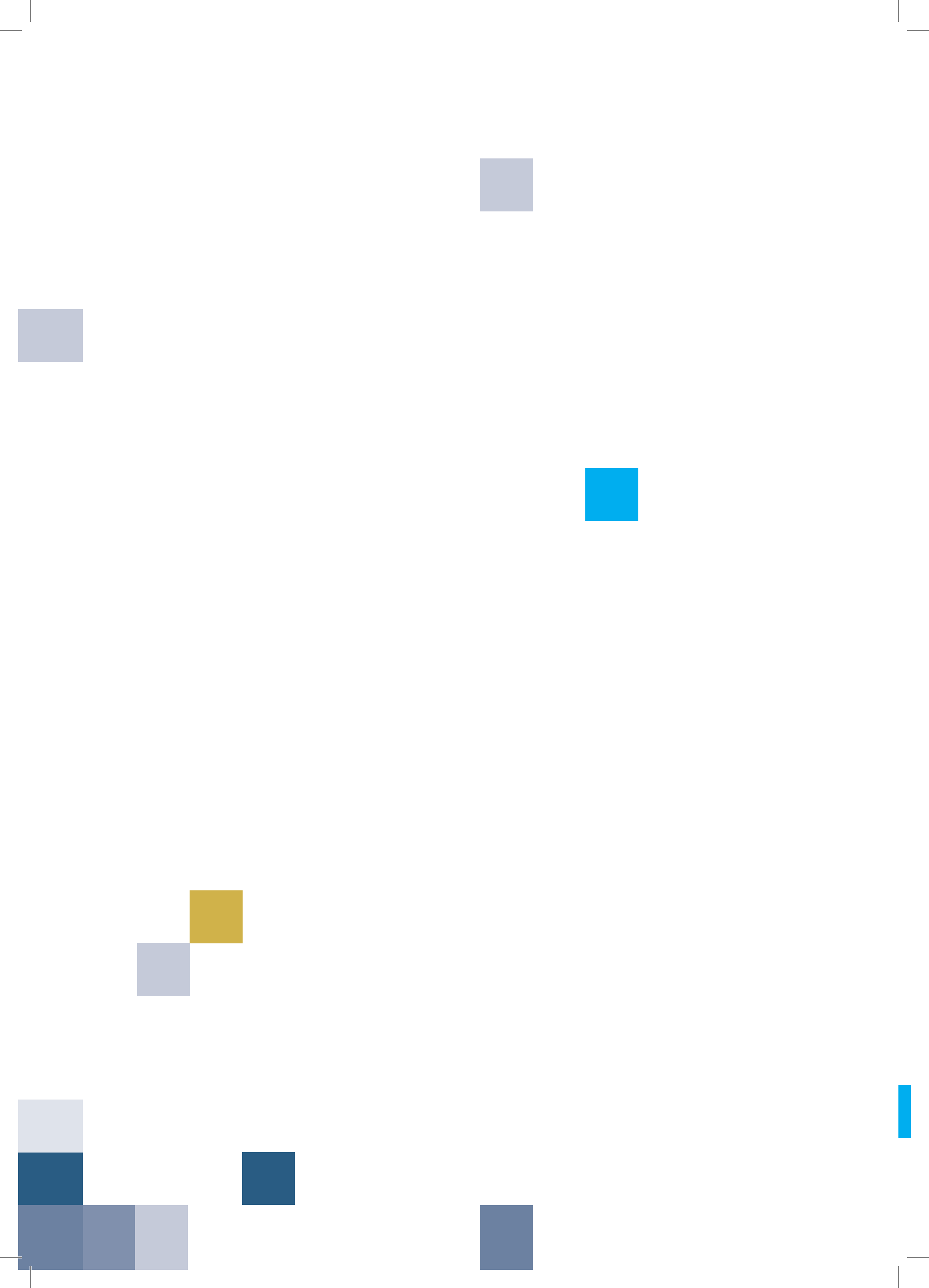


PRCA | **50 YEARS**
1969-2019

Middle East PR and Communications Census 2019

YouGov
What the world thinks

جمعية العلاقات العامة و الاتصالات
PRCA
قوة التواصل



MIDDLE EAST PR AND COMMUNICATIONS CENSUS 2019

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Danny Rogers FPRCA, Editor-in-Chief (UK and EMEA), PRWeek

“The topics that this Census tackles - from demographics and diversity to measurement, professionalism, and wellbeing - are ones that every PR professional in the region needs to consider.”

I’m delighted that PRWeek has partnered with PRCA MENA to bring you the first Middle East PR and Communications Census. We have been very pleased to work with the PRCA and YouGov on this report, and to encourage discussion of the issues it raises.

Over the years I’ve been writing about PR, I have been struck by how similar the problems, challenges, and opportunities are in all corners of the communications business. The same is true when I consider this publication, alongside last month’s inaugural Asia-Pacific PR and Communications Census, and other pieces of industry research including the long-standing PRCA UK Census, which was launched in partnership with PRWeek in 2011.

The topics that this Census tackles - from demographics and diversity to measurement, professionalism, and wellbeing - are ones that every PR professional in the region needs to consider.

Having read the diversity section, think about your hiring processes and what are you doing to make sure that your PR team reflects not just your local community but the audiences you seek to engage? Reflect on the opinions section - do you have a culture of rigorous evaluation that will breed confidence in the effectiveness of your work? As regards to the wellbeing section, does it suggest that you could be doing more create the happiest, more

productive environment for your staff? And thinking about the final section, and the question of money - are you paying your staff fairly, and at a competitive enough rate to keep them happy?

I hope that by thinking about these and other questions, we and the PRCA can drive you on to achieve more, to run even better campaigns, and to take even more pleasure from working in this extraordinary industry. PRWeek looks forward to keeping a keen eye on your progress.

Danny Rogers FPRCA, Editor-in-Chief (UK and EMEA), PRWeek



**Omar Qirem FPRCA, Chairman,
PRCA MENA and Middle East
CEO, Edelman**



**Melissa Cannon MPRCA,
Director, PRCA MENA**

“All smart organisations know the value of data and insights - this Census will provide food for thought, inspiration, and benchmarks to help our vibrant profession thrive during a period of historic change and opportunity in the region.”

Introduction

We're delighted to conclude Omar's first year as PRCA MENA Chairman with the publication of the first PRCA Middle East Census.

Our Census is the most insightful and informative overview of the current state and future direction of the region's PR profession. In an age where all smart organisations know the value of data and insights, it will provide food for thought, inspiration, and benchmarks to help our vibrant profession thrive during a period of historic transformation in the region.

For the public relations and communications profession to thrive, it needs to be just that - professional. This means a focus on things like rigorous evaluation of our work, training, and qualifications - areas in which, as this Census shows, there is more to be done.

It also needs to think carefully about talent and employee wellbeing. This Census shows that the PR workforce is diverse and multi-lingual, but also working long hours and under pressure. Ensuring that PR is an attractive place to build a career, and a healthy and nourishing environment with a culture of diversity and inclusion, is vital to us producing the best possible work.

If we make that progress, we can increase the number of the region's practitioners considering PR a profession rather than a trade - this year it's 34%, but we want that to grow.

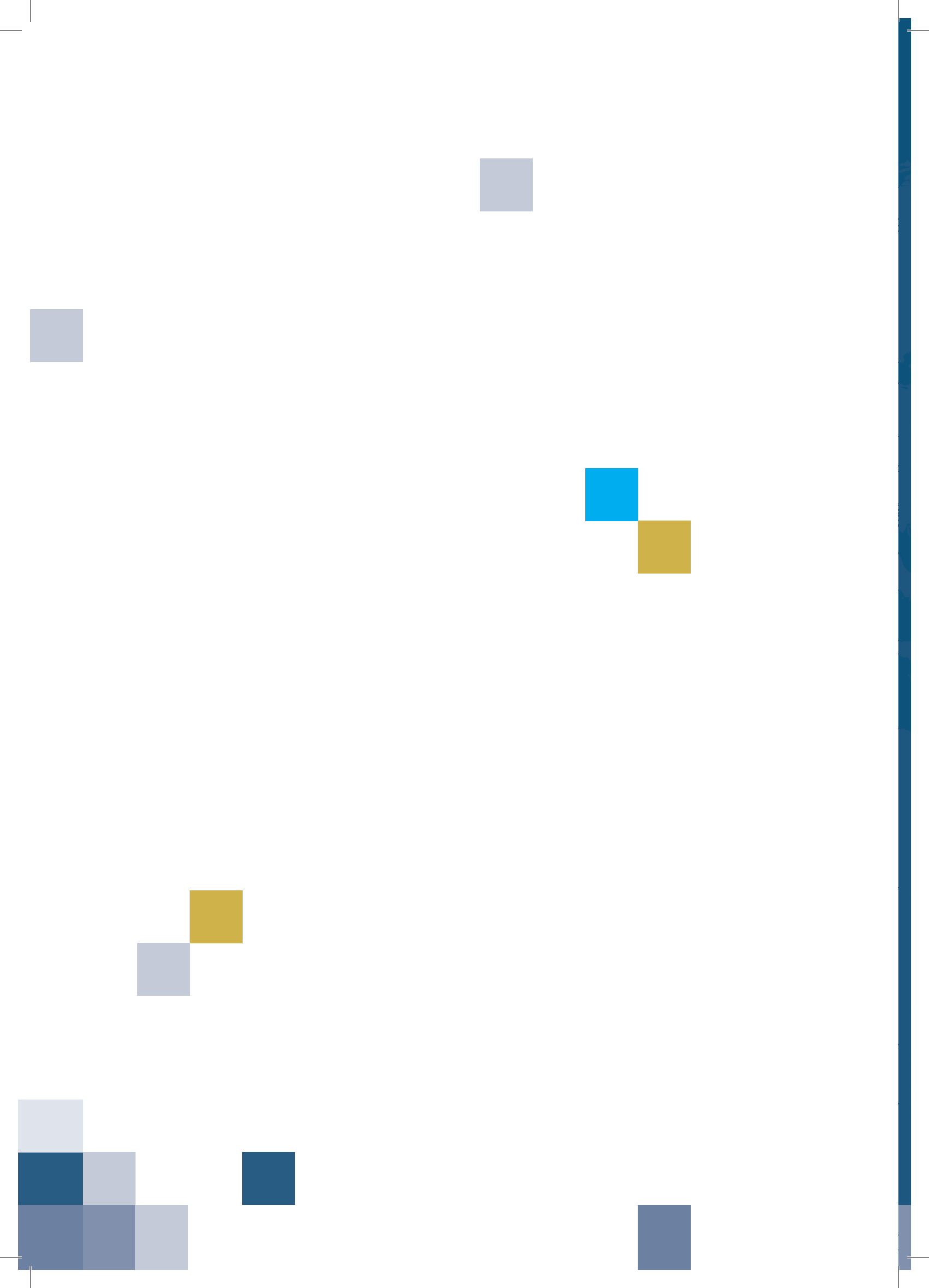
Not just for the sake of it, but because professionalism means winning even greater trust from clients to run creative, transformative, and strategic PR programmes. We hope you're as excited as us by this opportunity.

Finally, I'd like to thank our media partner PRWeek and research partner YouGov for their roles in creating and launching this Census. We also must thank all the PRCA's staff - both those in the Middle East, and those in London who have just celebrated the organisation's 50th anniversary - for their hard work.

But the biggest thank you must go to those of you who filled out the survey, for which we are most grateful. This is your Census - We hope you find it valuable.

**Omar Qirem FPRCA
Chairman, PRCA MENA and
Middle East CEO, Edelman**

**Melissa Cannon MPRCA,
Director, PRCA MENA**



1

Executive Summary

METHODOLOGY

The survey was carried out online by YouGov using two different sample sources:

- Targeted sample sent to PRCA members.
- Public link on PRCA and PRWeek websites.

The online survey generated a total of 308 responses between 24th July, 2019 and 12th September, 2019.

The majority of respondents (84%) work for PR and communications agencies, while 8% are employed in-house, and 7% are freelancers.

Respondents are evenly spread across a wide variety of roles from Chairman, CEO, and Managing Director to Trainee Account Executive, Intern, and Apprentice.

References to 'the UK Census' or similar are to the UK PR and Communications Census, published in May 2019 by the PRCA. Any references to the 'Asia-Pacific Census', the 'APAC Census', or similar are to the Asia-Pacific PR and Communications Census, published in November 2019, also by the PRCA.

Averages: a 'mean average' refers to the average found by adding up all the numbers in a series and dividing the total by the number of values making up that series. 'Median average' means the middle number in that series. Unless otherwise stated, we use the mean average in this report.

DIVERSITY

The industry is predominantly female (71%) - a similar figure to that found in other PRCA regions. It is also predominantly young, with a median age of 34.

It is also cosmopolitan, with respondents representing a total of 31 different nationalities, and a majority speaking languages other than English - the most common of these is Arabic. Almost all (93%) have been to university.

Only a very small number (2%) of respondents consider themselves to have a disability.

OPINIONS

A third of those working in PR in the region consider it to be a profession (as opposed to an industry).

Advertising Value Equivalents (AVEs) are the most common method of evaluating PR and communications work in the industry - although a third do not use evaluation methods at all.

Asked what areas of PR work were becoming more and less important, digital and communications strategy development were viewed as becoming more important, while sales promotion and general media relations were becoming less so.

WHAT DO WE DO?

The most common main function of PR professionals in the Middle East is communications strategy development. However, two-fifths of PR and communications staff spend more than 20% of their time on activities other than PR.

Consumer services, media, and marketing is the most common area of business for the companies employing survey respondents. The agencies

employing survey respondents mostly have 100 staff or fewer, with 51-100 staff the most common size bracket. 45% of respondents have one of a number of professional qualifications relating to their role.

WELLBEING

Of those who answered the question, a fifth have suffered from or been diagnosed with mental ill health.

More than two-thirds (69%) of employed respondents enjoy personal medical insurance, the most common employee benefit. While most are contracted to work around 40 hours per week, the average number of hours actually worked is 50.

Nearly three in five respondents make work-related calls and emails outside of office hours on a daily basis. The same proportion take advantage of some form of flexible working arrangements.

While younger staff have slightly longer commutes than older staff, they also take fewer trips away from the office for work. Overall, 15% of respondents travel within the Middle East region more than once a month on average, and 6% travel beyond the region at least monthly.

SALARIES & GENDER PAY GAP

Our data shows an average total household income of \$76,300 per respondent, a figure that is nearly 50% higher for male respondents (\$97,500) than for female respondents (\$67,400).

It also shows higher household earnings among respondents in agency roles as opposed to in-house or freelance positions, and for those who are older than 35, or have worked in PR and communications for more than five years.

2

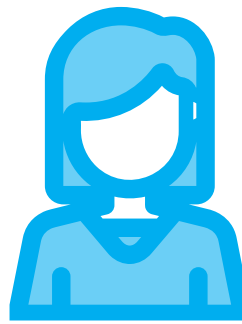
Diversity

GENDER

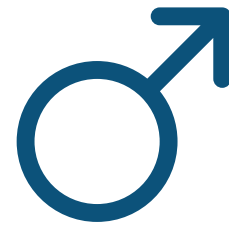
The PR and communications industry in the region is predominantly female (71%). This is similar to the figures of 67% in the UK Census and 61% in this year's inaugural Asia-Pacific Census.

Women are less represented among more senior practitioners - while 87% of under 35s are female, this drops to 51% among those aged 35 and up. This is also the case elsewhere in the world of PR.

Similarly, while 85% of male respondents have been in a PR career for more than 5 years, this is only true of 55% of female respondents.



71%
WOMEN



29%
MALE

AGE

The median age of respondents is 34 - one year older than the median age in the 2019 UK Census, and one year younger than in this year's Asia-Pacific Census.

Nearly half of respondents (47%) are in the age range 25-34, while 7% are aged 24 or younger. A third (33%) are aged 35-44, 10% aged 45-54 and 3% are older than this.



**AVERAGE
AGE**

PRCA MENA BOARD COMMENT

"The industry, globally, is predominantly female. We should, however, work on retaining that female talent as they make their way into more senior roles, which remains a challenge also in this region."

**Maria Cohn MPRCA, Managing Director, Strategic Communications,
FTI Consulting**

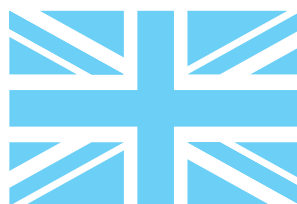
NATIONALITY

The PR and communications profession in the region is highly cosmopolitan, with respondents representing a total of 31 different nationalities covering every continent of the globe - Antarctica aside.

The single most common nationality, held by 20% of respondents, is British (UK), closely followed by Indian (18%). However, nationals of countries in the Middle East and North Africa region collectively make up 30% of the regional PR workforce. This is perhaps not surprising given that the majority of the population and workforce in the UAE, the country in which most census respondents are based, are foreign nationals. The same is true of Bahrain, Kuwait, and Qatar.

Our data suggests that women are more likely to move from outside the region to take up local PR and communications roles - 41% of men responding to the survey are nationals of the Middle East and North Africa region, compared to 29% of women.

BRITISH NATIONALS



20%

INDIAN NATIONALS



18%

30% Locals

PRCA MENA BOARD COMMENT

"This highlights that we're struggling to attract Arabic talent in the Gulf, which is concerning because Arab nationals best understand this region's cultures and practices, and therefore its audiences. We need to educate Arab youth on the opportunities of PR careers as an industry."

Alex Malouf MPRCA, Corporate Communications Manager,
Procter & Gamble

DISABILITY

Around 2% of PR and communications professionals in the region consider themselves to have a disability.

While definitions and data vary significantly, around 10% to 15% of people globally have a disability. People with disabilities tend to be under-represented in the job market generally. This is true of the PR profession in the UK (where 4% of UK census respondents have a disability) just as would appear to be the case in the Middle East - and in the Asia-Pacific Census, which found that 2% of practitioners have a disability.

2%
Disabled
practitioners



LANGUAGES

We asked respondents: "Other than English, which, if any, of the following languages can you speak well enough to conduct a business-related conversation?"

In this cosmopolitan region, the majority of respondents are multilingual - 39% selected Arabic, 15% selected Hindi, 12% selected French, and 8% selected Urdu - while a further 20% of respondents speak another language not among those listed.

The 71% of respondents who can speak another language is a much higher figure than in other regions - in the APAC Census it was 53% and in the UK version it was 22%.

EDUCATION

Almost all (93%) of PR practitioners responding to our survey had been to university - with nearly a third of those having taken a higher degree such as a Master's.

The most common subjects studied were:

- Business/management - 29%
- Public relations - 21%
- Media - 16%
- Arts and humanities - 12%
- Social sciences - 6%
- Engineering/technology - 3%
- Life Sciences/ Medicine - 1%
- Other - 11%


66% of respondents said their parents had also gone to university.


CHILDREN

Almost exactly a third (34%) of survey respondents have children or dependents. 35% of those have one, 52% have two, and 13% have three.

hello
ولیه
नमस्ते
bonjour
hola
ابحرم

29% 
Business/management

21% 
Public relations (PR)

16% 
Media

12% 
Arts & humanities

PRCA MENA BOARD COMMENT

"You don't have to have a specific degree in PR or Communication to make it in this business. PR is also about having the personality, the capacity to adapt and the fact that you are curious about the world. You don't need a specific major related to the field to have these."

Joumana Rizk-Yarak MPRCA, Managing Director, Mirros



3

Opinions

IS PR A PROFESSION OR AN INDUSTRY?

34% of PR practitioners in the region believe that PR is a profession. The majority (61%) consider it an industry, while 5% say it is neither of these.

This is in contrast to the UK census, which showed 50% of 2019's respondents considering PR to be a profession, a figure which has been higher in previous years. In this year's Asia-Pacific Census, the figure is 60%.

34% believe that PR is a profession



61% believe that PR is an industry

EVALUATION

Respondents were asked to choose which method of evaluation, if any, they were most likely to use.

The most popular method of evaluation is Advertising Value Equivalents (AVEs), chosen by 30% of respondents despite not being considered a robust measurement framework by most PR leaders.

Other evaluation methods employed include impressions (10%), the Barcelona Principles 2.0 (7%), the Integrated Evaluation Framework (6%), and PESO (4%), while 9% of respondents use other forms of evaluation. Impressions were the most common measurement method used in the UK Census. In APAC, it was also AVEs, chosen by 14%.

The remainder either do not use evaluation methods (21%) or do not know what method is used in their organisation (14%).

In the UK Census, 26% said they do not evaluate and 14% did not know what method they used. In the APAC Census, the respective figures were 16% and 7%.

PRCA MENA BOARD COMMENT

"Measurement remains a fundamental challenge for our industry. We have run out of excuses, though. Online, digital, data analytics, etcetera are here to stay. We need to wrap our heads around this and use them in our favour."

Maria Cohn MPRCA, Managing Director, Strategic Communications, FTI Consulting

30% AVEs

10% Impressions

21%
Do not use any PR evaluation methods

TASKS AND ROLES

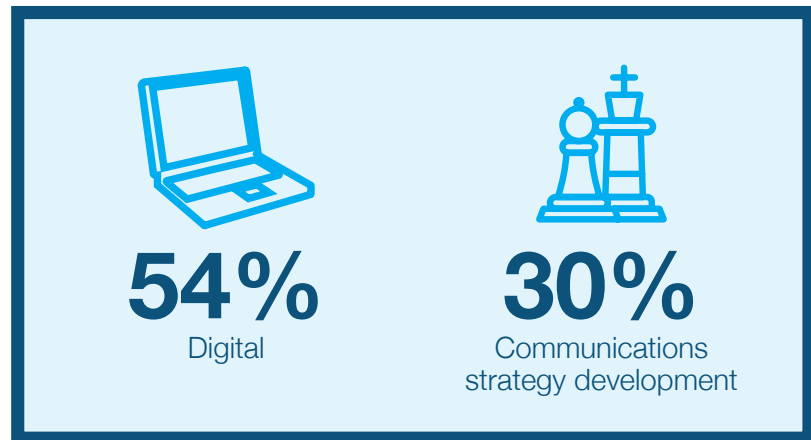
We asked respondents to cast their mind back over the past two years and think about which elements of their work had become more - and less - important over time.

Increase in importance

By some margin, the most common answer for increased importance is digital, chosen by 54% of respondents.

Communications strategy development was the second most popular response (30%). Other answers frequently chosen were online communication (26%), reputation management (25%), crisis management (23%), media relations strategy planning (15%), SEO (13%), branding and marketing (12%), and research and evaluation (9%).

In both the UK Census and the APAC Census, digital/social media was also the top answer to this question.



PRCA MENA BOARD COMMENT

"Digital PR and strategy are now an integral part of day-to-day PR activation, so this upward trend does not surprise me. Moving forward, I think there will be a steep rise in integrated offerings."

Ahmad Itani MPRCA, Founder & CEO, Cicero & Bernay Public Relations, Vice-Chairman, PRCA MENA

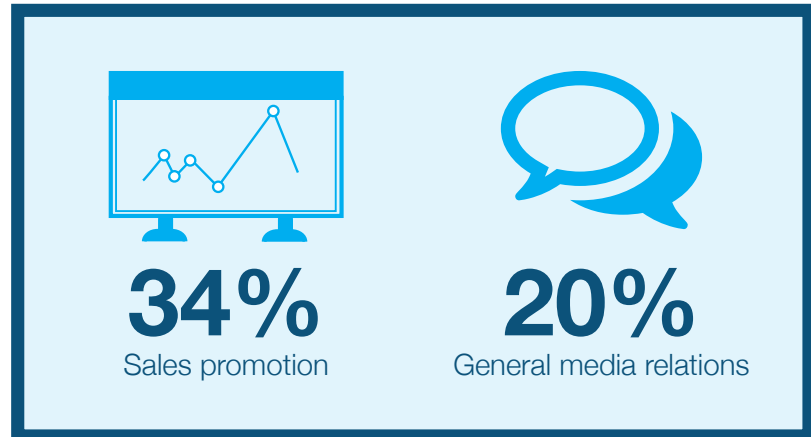
Decrease in importance

There was less uniformity in responses to the question of what tasks were becoming less important.

However, the most common answer (sales promotion, chosen by 34%) was also the top answer in the UK Census (with 29%). In the APAC Census, it was joint top with 26%.

Other popular choices were general media relations (chosen by 20% of respondents), writing articles and newsletters (16%), event planning/organisation (15%), public affairs and lobbying (14%), line management of PR staff (14%), investor relations or financial PR (12%), media analysis (10%), and corporate social responsibility (10%).

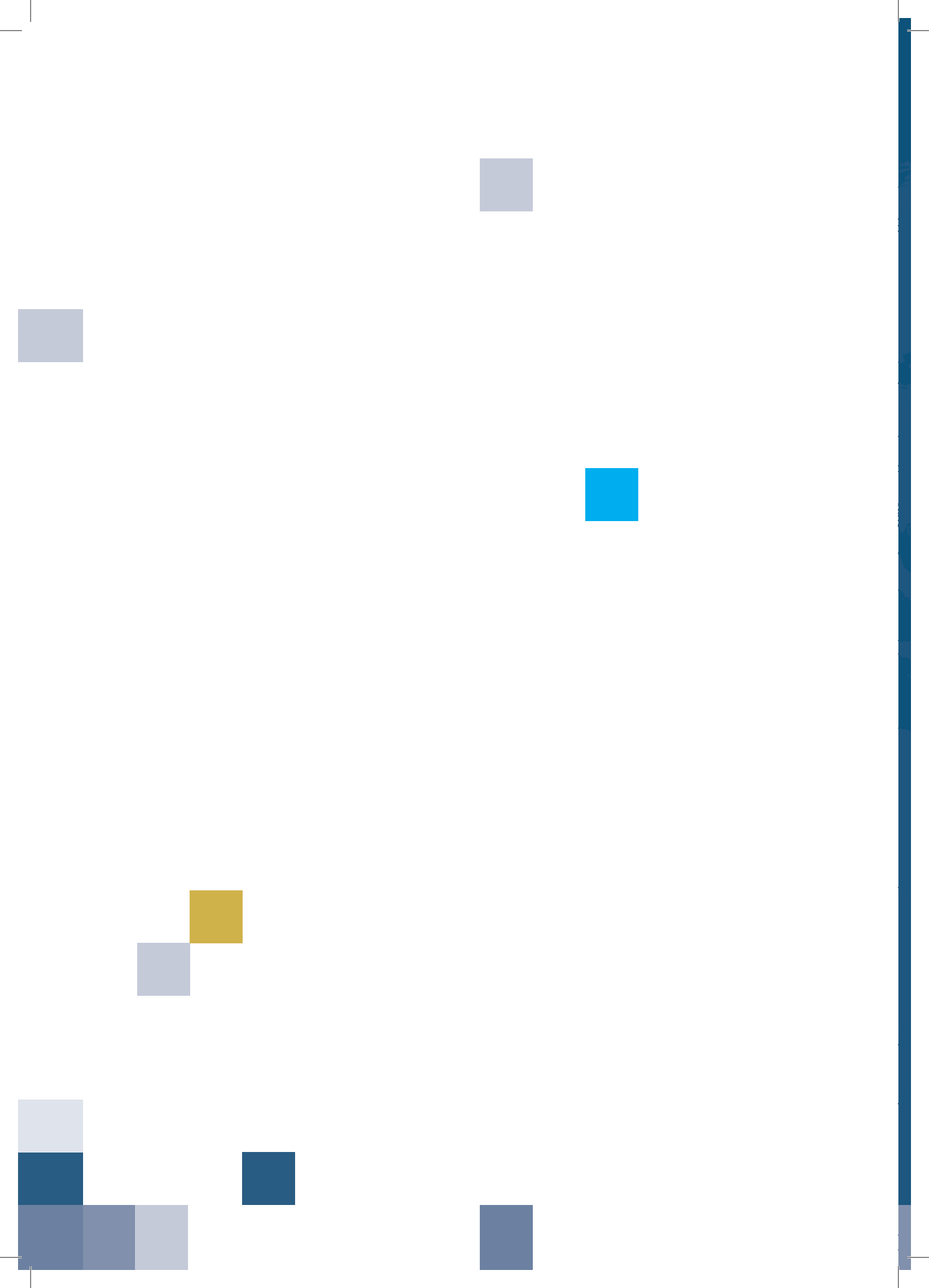
Just 2% think that digital has become less important, and only 1% say that of communications strategy development.



PRCA MENA BOARD COMMENT

"I'm puzzled by line management of PR staff dropping in importance. That's worrying as we have to continue to provide better training to staff rising up through the ranks."

Loretta Ahmed FPRCA, Middle East and North Africa CEO, Grayling



4

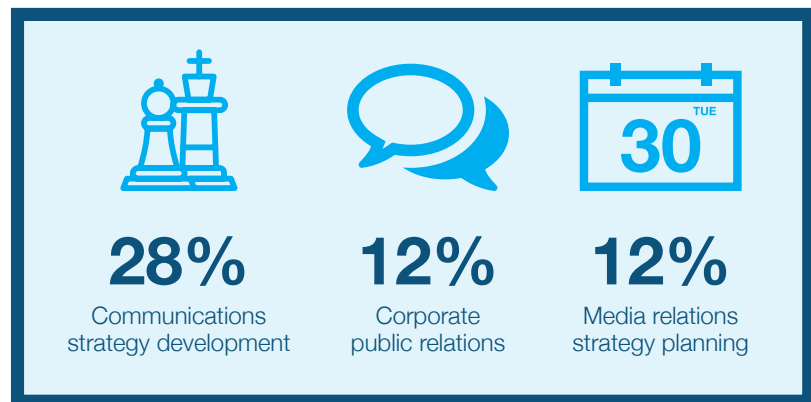
What do we do?

MAIN FUNCTIONS

Having looked in the previous section at which aspects of PR are becoming more and less important over time, we now look at respondents' current main function.

Communications strategy development, having been cited as one of the areas most notably increasing in importance, is also the main function for 28% of those responding.

That is followed by corporate public relations (12%), media relations strategy planning (12%), line management of PR staff (7%), reputation management (6%) and PR programme planning (6%).



PRCA MENA BOARD COMMENT

"Over and above the strong digital trend, we also see a clear move from clients towards management of their reputation, off- and online. This works hand-in-hand with crises preparedness and management."

Alexandre Beaulieu MPRCA, Regional Director for North Africa, TBWA\

AVERAGE TIME SPENT ON PR ACTIVITIES

Whether it is because they need to take care of administration and bureaucracy, or because their job is wider than just PR, not all respondents are able to focus their working time solely on PR and communications related activities.

59% of respondents say that more than 80% of their role is focused on PR and communications related activities - similar to the equivalent figures in the UK Census (62%) and APAC Census (53%). The figure rises among Middle East practitioners aged under 35 to 68%, but falls among those aged 35 or over to 49%, which is likely to indicate that more senior practitioners have more general management or administrative responsibilities outside of PR-specific functions.

22% of respondents claim to spend 61-80% of their time on PR and communications activities, while 8% spend 41-60% of their time on it.

3 in 5

practitioners spend 80% of more of their time on PR activity...

...but the figure drops for more senior professionals



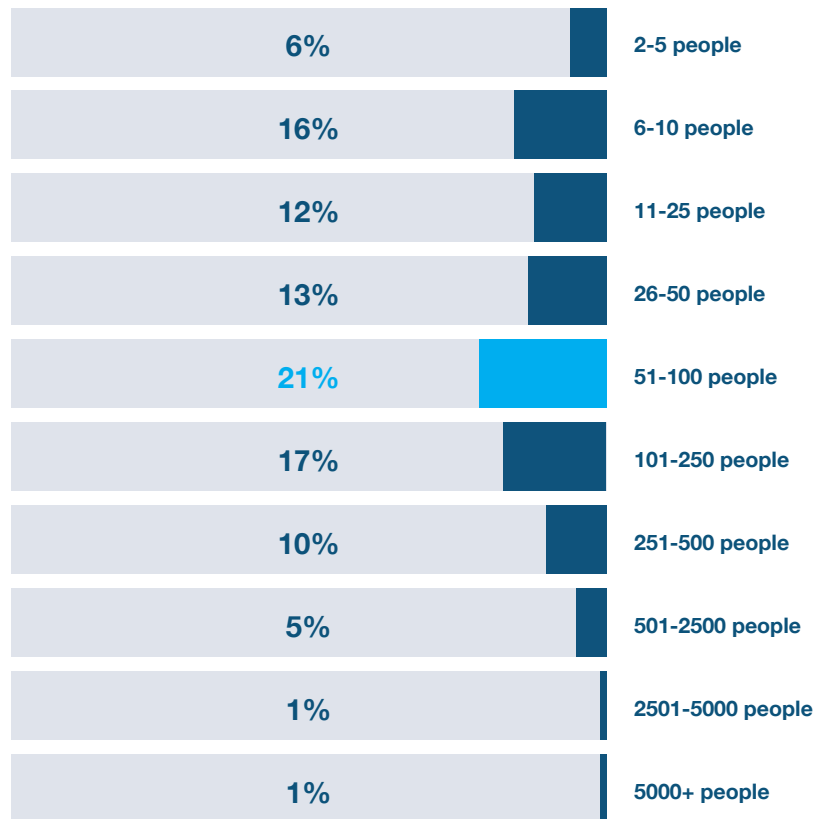
MAIN SECTORS

Asked to select up to three sectors that best described their area of business, 30% of agency respondents selected consumer services, media, and marketing.

The second most common answer was local government (26%), followed in turn by technology (23%), finance/financial services (16%), and automotive (15%). Central government was chosen by 13%, and 'Non-departmental body/agency (public sector)' by 12%.

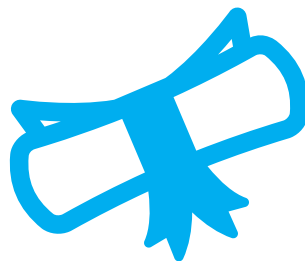
SIZE OF AGENCIES

Those working for agencies were asked how many people were employed by their agency in the Middle East - answers ranged from fewer than five, to more than 5,000. The most common answer was 51-100 people, and two-thirds of people work for agencies with fewer than 100 staff.



PROFESSIONAL QUALIFICATIONS

A small number (7%) of respondents have a PRCA qualification. Nearly a tenth (9%) have an MBA, and while another 28% report having another professional qualification directly relevant to PR, but 55% of respondents do not have any such qualification.



7%
PRCA qualification

9%
MBA qualification

28%
other qualification

PRCA MENA BOARD COMMENT

"We keep talking about wanting to have a seat at the management table, and yet too few of us are willing to get certified, which is the basis for any profession. I'd like to see more employers insist on senior practitioners being certified by a global body, and also more senior communicators working to get their teams certified."

**Alex Malouf MPRCA, Corporate Communications Manager,
Procter & Gamble**

5

Wellbeing

MENTAL HEALTH

Respondents were asked whether they had ever been diagnosed with or suffered from mental ill health. While 5% said that they 'would rather not say', a fifth (20%) of those who did respond said that they had received such a diagnosis.

Younger professionals are much more likely to report having suffered with mental ill health - among those who responded, 27% of those under 35 responded 'yes', compared to 11% of those aged 35 or over. This may reflect increased awareness of mental ill health issues in younger generations.

Respondents were able to enter additional details about their answer to this question. Some respondents focused on the cause of periods of mental ill health, which were a mixture of personal (e.g. bereavement) and work-related (e.g. bullying). One respondent, who was diagnosed as having bipolar disorder when working as a journalist, reported that the shift into PR "helped me with my treatment, as there is more support (more teamwork) and room to decrease pressure - for instance, you can't push deadlines when you're a journalist".

BENEFITS

The top three benefits that Middle East PR and communications professionals currently access are personal medical insurance (59%), personal annual air ticket (58%), and transportation allowance (27%).

A gratuity (for length of service) is enjoyed by 26%, while 25% have their telecoms bills paid by their company, and 23% have a mobile provided.

20% also use family medical insurance, and 12% have family annual air tickets. 8% of respondents did not get any of the lengthy list of benefits provided in the survey - although a third of those were freelancers or independent consultants.



20%
suffered from or
diagnosed with
mental ill health

PRCA MENA BOARD COMMENT

"In this stressful industry, employee wellbeing is essential and cannot be negotiated or compromised. Investing more in employee wellbeing is a must and not a luxury - it is actually very critical for a company's continuity, productivity, and growth."

Suzanne Talhouk MPRCA, General Manager (Levant), H+K Strategies

59%
personal medical
insurance



58%
personal annual
air ticket



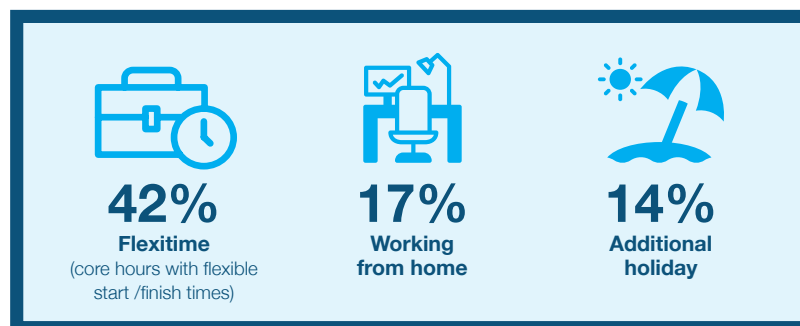
27%
transportation
allowance



FLEXIBLE WORKING

While two-fifths (43%) of respondents do not take advantage of any flexible working arrangements, the majority do make use of at least one. Of the small number who work from home, the majority (60%) do so one day a week.

The three most common flexible arrangements are shown on the right.



PRCA MENA BOARD COMMENT

“We have to keep women in the workplace. This will only happen if the gender pay gap closes and companies adopt more flexible practices. Flexible working is a no brainer – done well, it improves engagement, trust, and business performance.”

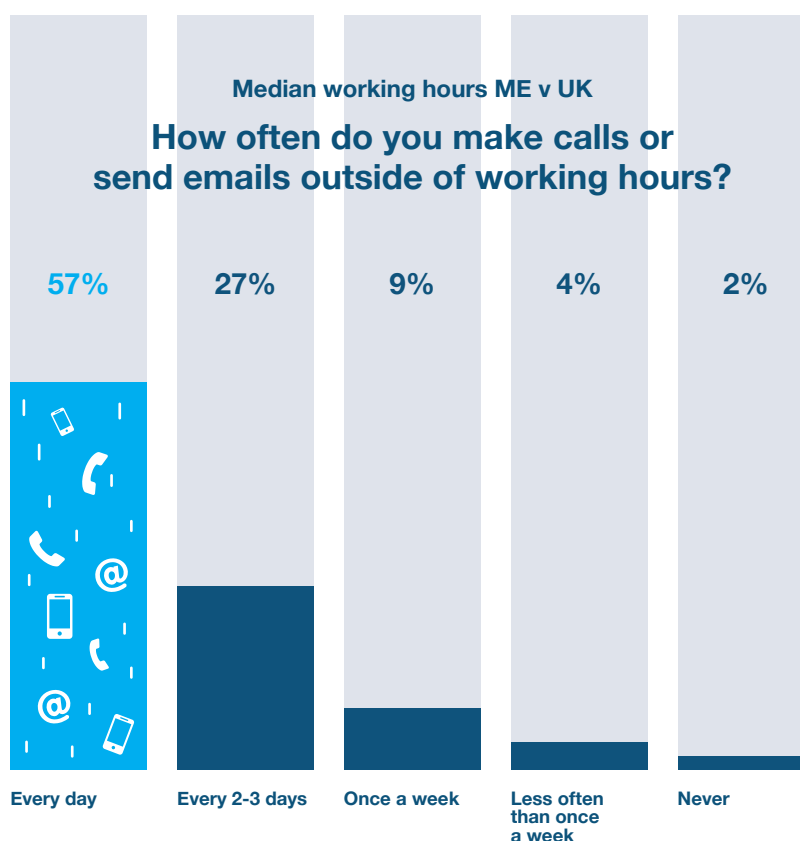
Loretta Ahmed FPRCA, Middle East and North Africa CEO, Grayling

WORK-LIFE BALANCE

Our respondents were asked how many hours per week they are contracted to work. The median was 40, and the mean average was slightly higher, at 42. 80% of respondents are contracted to work between 35 and 45 hours per week. While most others fall slightly above or below this range, 4% are supposed to work more than 54 hours a week - with a 72-hour week the highest figure.

However, in reality people work substantially longer than that - both a mean and median of 50 hours. Around one in 12 (8%) work 70 hours or more, with 80 hours the highest figure. In the UK Census, people said they worked an average of 45 hours per week, 10 more than contracted. In APAC, it was 46 versus a contracted average of 39.

An area in which the Middle East differs from the UK Census is that 57% of our respondents make work-related calls and emails outside of office hours every day - nearly double the 32% figures seen in both the UK Census and the 31% of the Asia-Pacific Census.

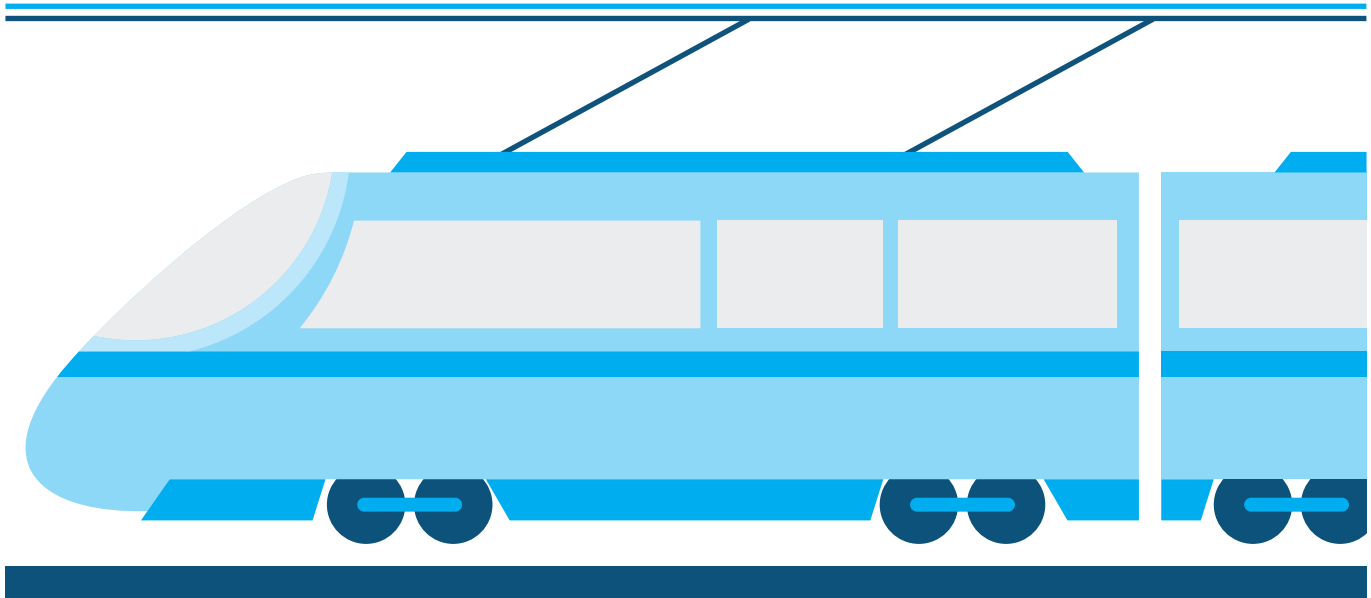


COMMUTING

Middle East PR professionals spend a median average of 30 minutes travelling to and from work every day. This number rises to 40 minutes among staff aged under 35.

30mins

Average commute



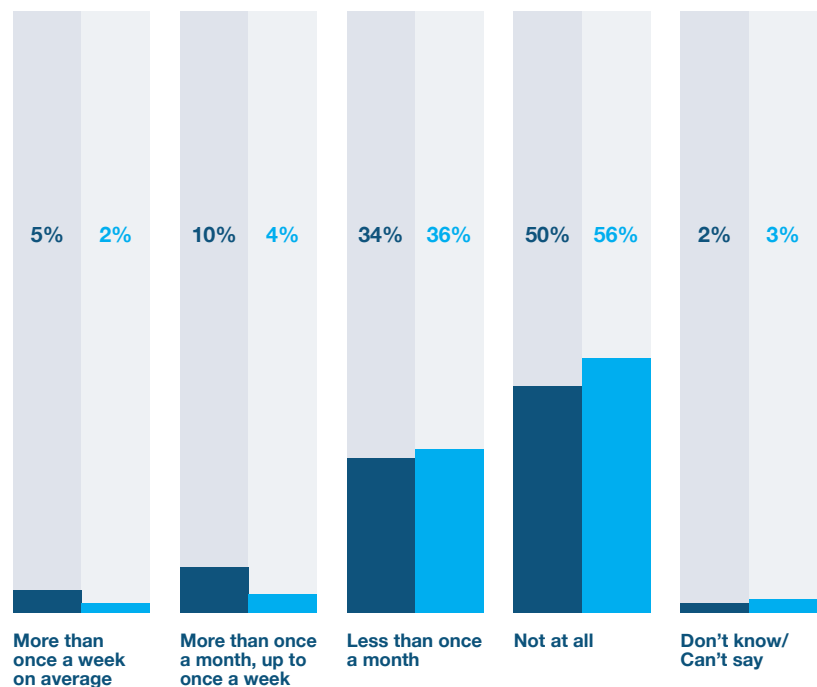
TRAVEL

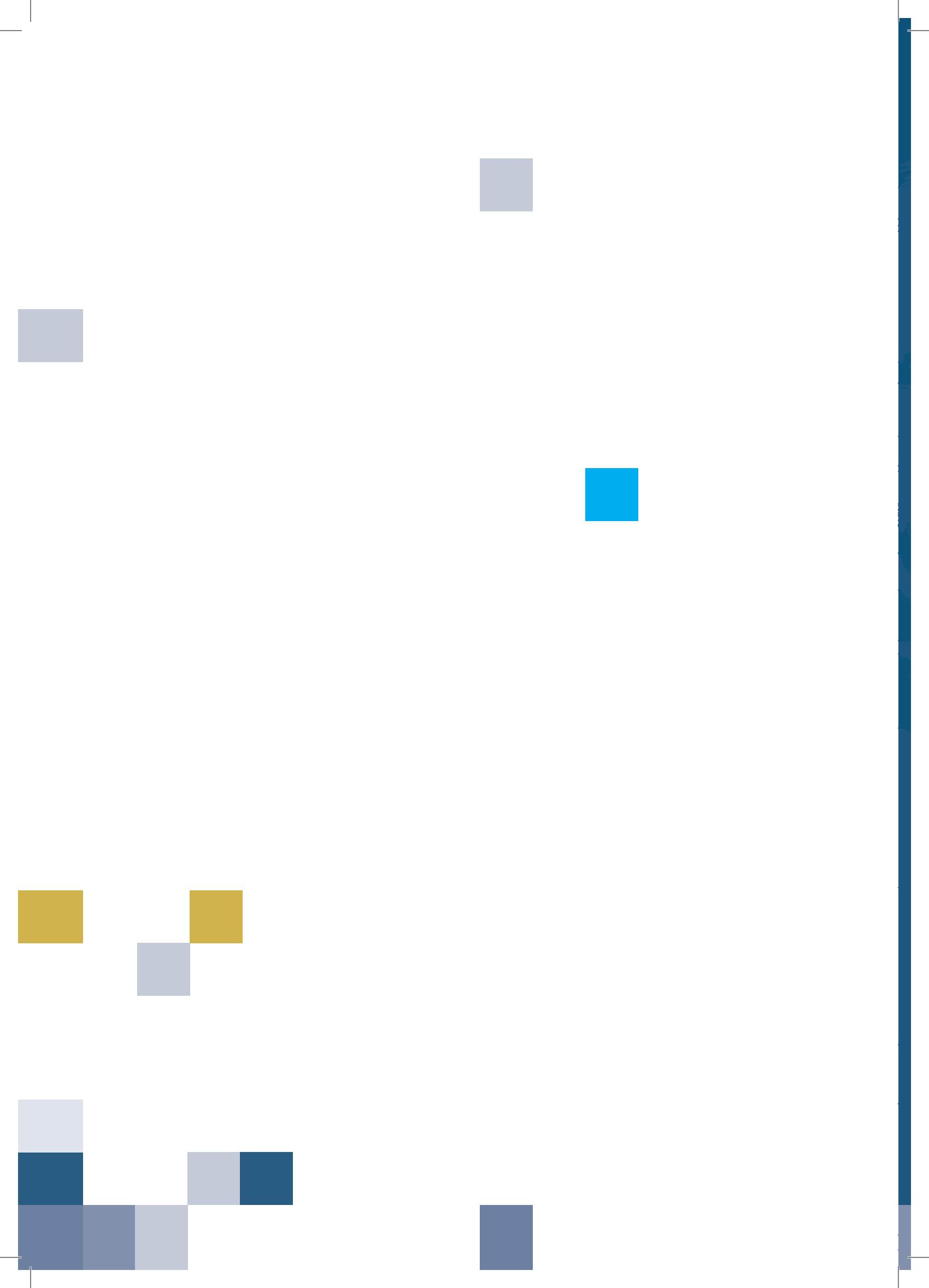
Our survey asked PR professionals how often they had travelled away from the office - whether inside or outside of the Middle East - in the past three months. 5% said they travelled within the region very often (meaning more than once a week on average), and 2% said that they been out of the region very often.

Most respondents never have to travel. However, older staff are more likely to do so - 12% of those aged 35+ travelled out of the region more than once a month, and 23% travelled locally. For staff aged 34 and under, that drops to 2% and 8% respectively.

How often do you travel...

■ within the region ■ outside of it





6

Salaries & Gender Pay Gap

SALARIES

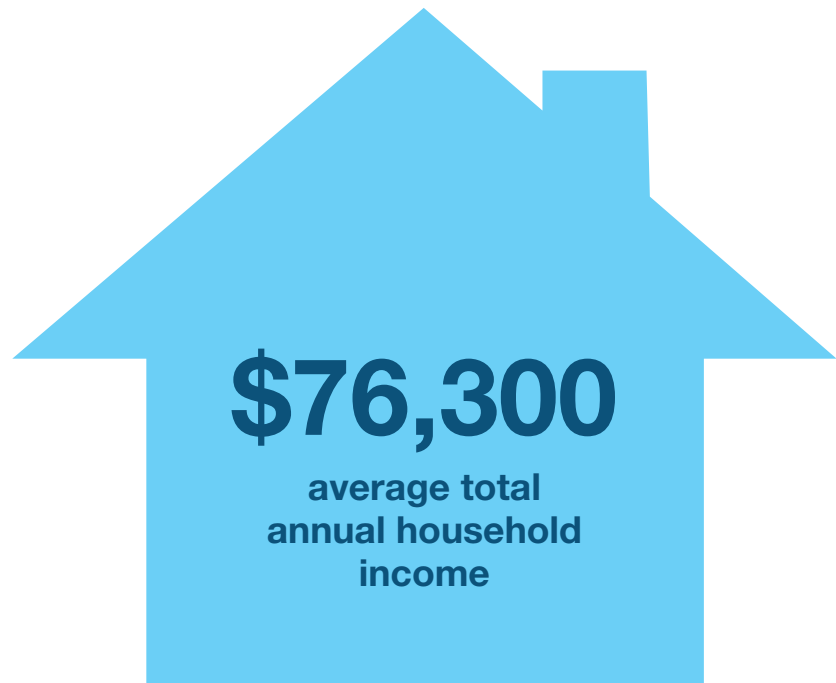
Rather than ask respondents their salary, we asked for total net (i.e. post-tax) household income per respondent in US dollars (\$). Across all respondents, the average figure is \$76,300 per annum.

Taking out those respondents from in-house or freelance roles, the figure is \$83,800, suggesting that agency employees are better paid than their counterparts.

In line with a gender pay gap that exists across industries and across the world, male respondents report an average household income of \$97,500, nearly 50% higher than female respondents' average of \$67,400.

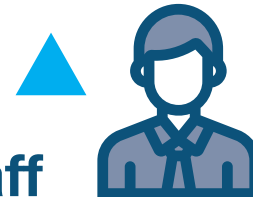
By comparison, in the UK Census there was a 14% pay gap. APAC Census data evidenced a 30% pay gap in Singapore, and strongly suggested such a gap existed in Australia and other markets.

A gap is also seen when we look at age and experience - those who have worked in PR/comms for up to five years report an average income of \$54,100, and those aged under 35 report it at \$60,900. Their older and more experienced counterparts earn more - \$95,800 among those aged 35 and over, and \$98,800 for this with more than five years of experience in the sector.



Higher for...

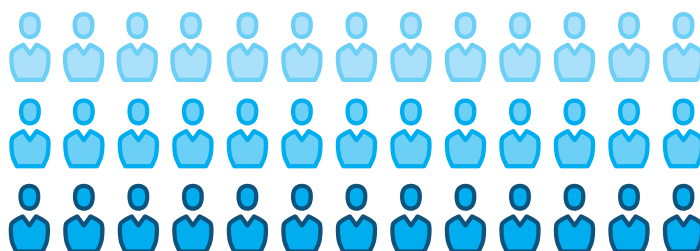
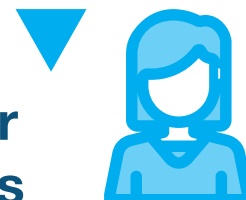
agency staff



...and men

Lower for... women

and younger practitioners



PRCA MENA BOARD COMMENT

"It is a shame to still see this gender gap in a female-dominated profession. It is very disappointing."

Suzanne Talhouk MPRCA,
General Manager (Levant),
H+K Strategies

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