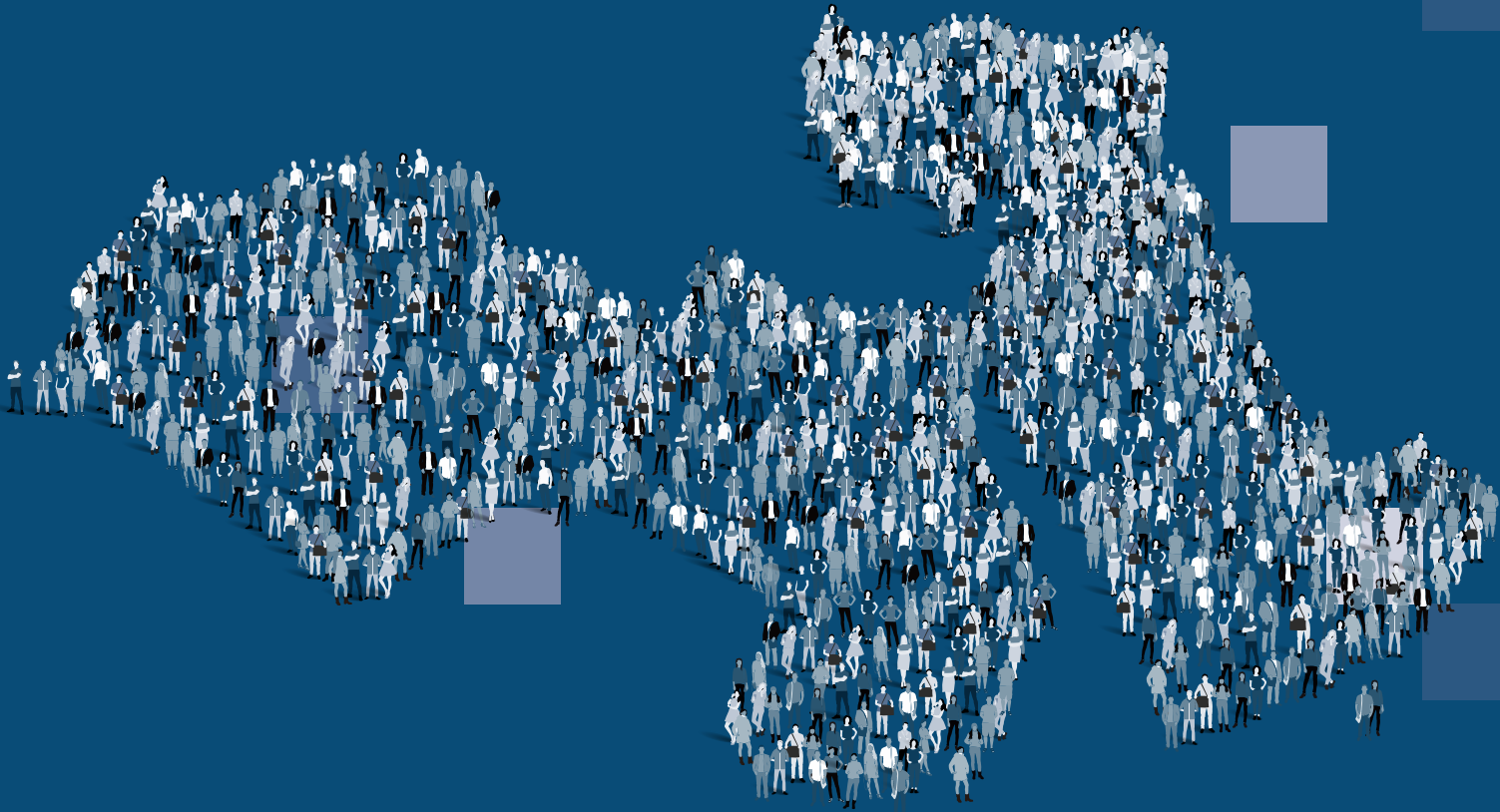


PR and Communications Census 2022 | MENA



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FOREWORD

By FRANCIS INGHAM MPRCA

PRCA Director General
and ICCO Chief Executive

“The numbers in this report suggest that accommodating work arrangements, such as accruing time off, adjusted contract hours and flexible start and finish times, have helped practitioners feel less stressed and more productive.”

The message from the 2022 PRCA MENA Census is simple – flexible working is a win for everyone.

Our members across the region are assuming increasingly important responsibilities in advising, guiding, and executing complex programmes for their organisations and clients – all while embracing flexible working arrangements. Encouragingly, the numbers in this report suggest that accommodating work arrangements, such as accruing time off, adjusted contract hours and flexible start and finish times, have helped practitioners feel less stressed and more productive.

The pandemic has opened our eyes to the challenge people face each day with their mental health. Indeed, more work needs to be done to ensure we protect and strengthen our own and colleagues' wellbeing. But it's been heartening to see the industry embrace the lessons of these difficult few years and embed policies that favour flexibility and, in turn, support mental health. Creating a culture of support has never been more important and I hope the industry continues to grasp this opportunity with both hands.

While the report makes for positive reading, it does highlight the scale of work still ahead to address gender inequality in PR. The numbers suggest that the industry's approach to promoting women to leadership positions hasn't improved. In fact, it has worsened. The industry has proved its resilience and that should give us the confidence to reimagine how we recruit, promote and pay our colleagues. The onus is on us to raise the bar.

I hope that this report's findings, and the comments gathered from leading practitioners across the region, prove useful as you look ahead to 2023.

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METHODOLOGY

This Census is based on a sample of 230 respondents from across the MENA region, with data gathered between 11th to 30th April 2022.

The survey was generated by YouGov using sample sources as below:

- Targeted sample using YouGov's proprietary panel.
- Targeted sample using PRCA's own database.
- Targeted sample sent to PRCA members and other organisations.
- Public link on the website.

The breakdown of respondents across the MENA region is as follows:

Country	Percentages
United Arab Emirates	41%
Saudi Arabia	18.50%
Egypt	10%
Morocco	8%
Jordan	3%
Algeria	2.50%
Iraq	2.50%
Lebanon	2.50%
Qatar	2.50%
Tunisia	2.50%
Kuwait	2%
Syria	2%
Oman	1%
Sudan	1%
Bahrain	0.50%
Yemen	0.50%
TOTAL	100%

INTRODUCTION







“As we continue to transition into a post-pandemic world, remote working has become the preferred option for practitioners in the region. Flexible working hours are now a non-negotiable for employees.”

The year 2022 could be described as a year of change.

This year's data shows that our working habits have changed considerably since the pandemic restrictions lifted. As we continue to transition into a post-pandemic world, remote working has become the preferred option for practitioners in the region. In fact, a significant higher number of people are working remotely full-time in 2022 compared to 2021. Flexible working hours are now a non-negotiable for employees.

Our report also quizzed practitioners in the UAE about the impact of the change in the working week. Overall, the move has been positive for mental health and workplace culture, with more opportunities unlocked for practitioners to connect with friends and family.

When it comes to the findings related to mental health issues, in 2021, only a small percentage of men reported to have had mental health issues. But this year, the data shows a sharp increase in men willing to open up about their mental health challenges. This is positive news as we push to destigmatise conversations around mental health.

MONIKA FOURNEAUX MPRCA

Head of EMEA – PRCA

In regard to the global gender pay gap, male respondents were found to be 10% more likely to receive a bonus payment. Interestingly, the mean value of the bonus reaches 3,770 USD for men, and 10,587 USD for women.

We have seen an elevation in the importance of the PR and communications role over the last 12 months in MENA. Our members are assuming increasingly important responsibilities in advising and guiding complex issues and programmes for their clients and organisations. But to meet the challenges and rising demand ahead, we must continue upskilling and creating an environment that allows all practitioners to both professionally and personally grow. I hope you enjoy reading this report and find the data useful as you build toward 2023.

“

The UAE is a progressive nation that continually positions itself ahead of the regional curve. When work schedules were modified to emphasise employee well-being, the results proved to be positive. We were of the first private companies to adopt 4.5 workdays in Dubai and have witnessed first-hand the results of improved employee morale and happiness. I will continue to look towards the guidance of the wise leadership who not only anticipate the future but surpass global performance measures in every possible way.

Over the past two years, a paradigm shift in the way businesses are run was introduced comprising remote work setups, with full-time remote workers constituting 37% of the total surveyed workforce. This is an interesting statistic, especially when considering that it represents a 25% jump over 2021 (12%). I am a proponent of the importance of space in driving creativity among team members, especially given the fact that we already have teams across more than 29 satellite offices worldwide working in unison.

”

Ahmad Itani MPRCA
Chairman of PRCA MENA
President of ICCO MIDDLE EAST
Founder and CEO of Cicero & Bernay Communication
Consultancy,

“

Our industry adapted to myriad challenges last year, pivoting to strategic counsel and exploring new technologies to help governments, multinational corporations and global brands communicate with razor-sharp focus. As we look to the future, recruitment and retention of talent is clearly going to be a key challenge for many organisations. Communications firms will need to go further and faster to stay ahead in a fast-changing world. Agility will be critical for those seeking not only growth and expansion but a desire to do meaningful work.

”

Imad Lahad
Managing Director, Dubai; Head Of AI Comms Lab;
Global Digital Practice Co-Lead
APCO Worldwide

**STATE
OF THE PROFESSION**



“

It is good to see how the region has adapted to and is making use of concepts such as remote working and flexible hours post the pandemic.

Flexibility regarding working practices has a host of benefits, including improved mental health and attracting those who may not be able to work a typical 9 to 5 role. This adaptation will help the industry grow faster and deliver better results for the organisations that we advise and support.

”

Alex Malouf
Communications Practitioner and
PRCA MENA Board Member

“

Flexibility has been positioned as a core benefit, in order to both retain and attract talent. Similarly, employees have become accustomed to working in an agile manner, following the working patterns adopted during the pandemic.

For organisations to attract future employees, flexibility must be a core composition of the firm's culture.

”

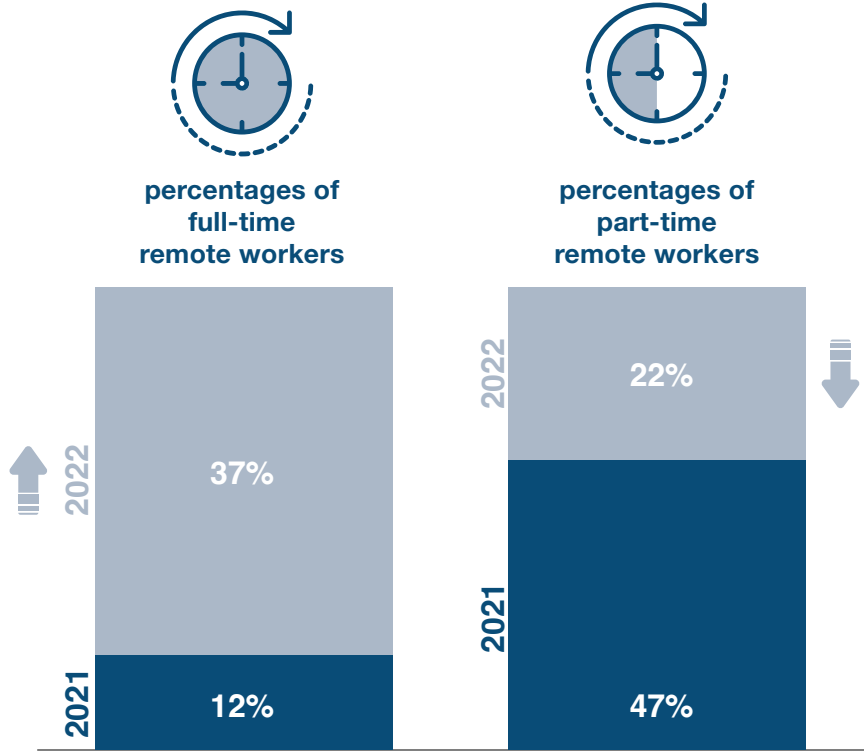
Mandip Dulay
Chief Strategy Officer and Founder
IMPACT-ME Group

State of the Profession

REMOTE WORKING

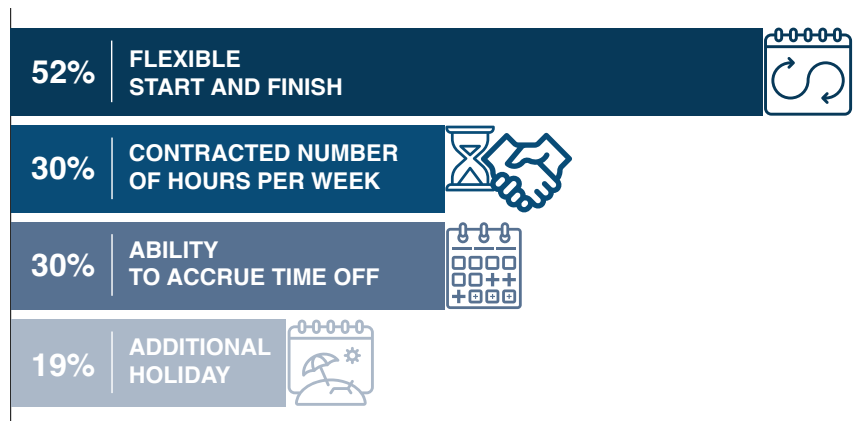
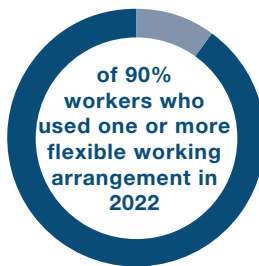
Interestingly, as we move towards a post-pandemic phase, there has been no real shift in the percentage of respondents that said they work in the office full-time. 40% of respondents selected this option, highlighting a mere one percent decrease from last year. There has been a 25% increase in the number of practitioners that now work remotely full-time. This is also reflected in the 25-point decrease from 47% to 22% of respondents that now work remotely part-time.

When asked about future plans, 47% of respondents stated that they plan to return to the office full-time once their office has fully re-opened.



FLEXIBLE HOURS

90% of respondents have used one or more flexible working arrangement in 2022 – this presents a significant increase, as in 2021, only 48% of respondents reported using a flexible working arrangement. The most requested arrangements in 2022 are flexible start and finish times (52%), contracted number of hours per week/ability to accrue time off (30%) and additional holiday (19%).



WORK SHIFTS IN THE UAE

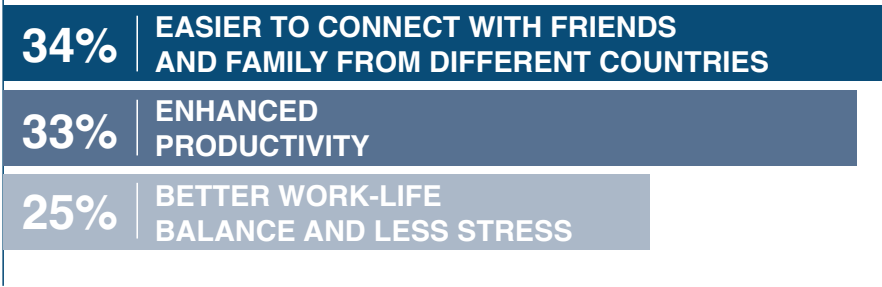
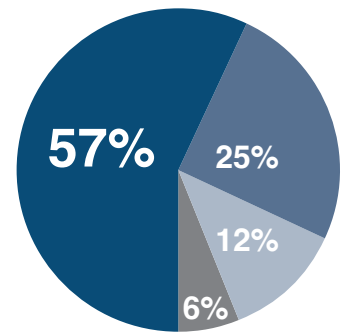
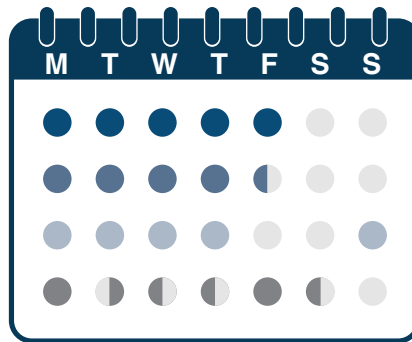
WORK SCHEDULE

When asked about their work schedules since January 2022, 57% of respondents said that they work five days (Mon-Fri), 25% said they work four-and-a-half days (Mon-Fri), 12% said they work five days (Sun-Thu) and 6% said they work other days.

Following on from this, respondents were asked how, if at all, they had been affected by the UAE's implementation of change in the work week. Interestingly, 33% of respondents said they felt more productive at work, while 34% felt that it was easier to connect with friends and family from different countries.

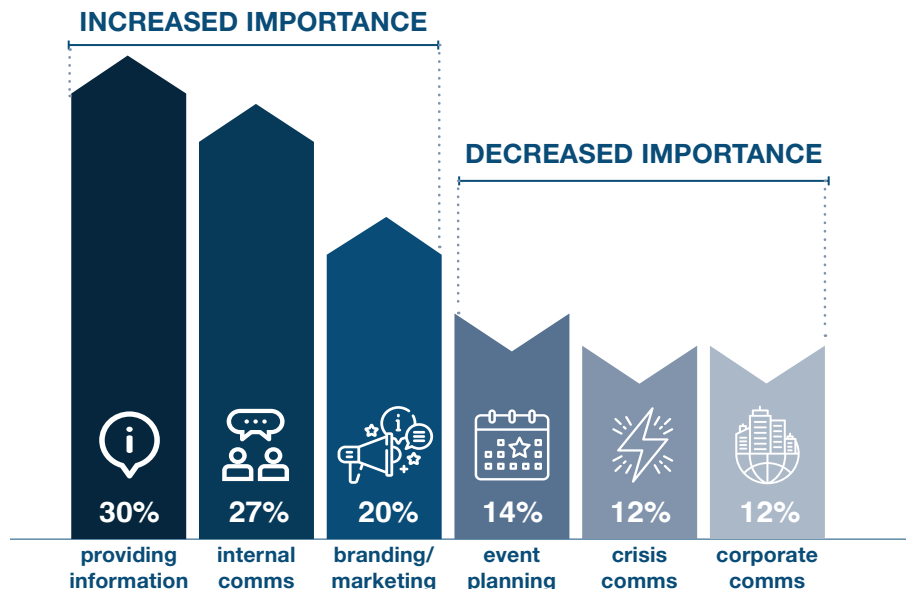
Encouragingly, 25% of respondents felt less stressed and believed to have a better work-life balance as a result of the change.

Overall, the change in work week has had major positive implications for the work force. However, it is worth noting that 24% stated that they were confused about the change in the work week and their change in shifts. Also, 13% stated that they have not observed a major difference compared to before the implementation.



INDUSTRY OPINIONS

When questioned on which three tasks/roles of PR and communications had significantly grown in importance over the past two years, providing information (30%), internal communications (27%) and branding and marketing (20%) ranked highest amongst responses. On the contrary, event planning/organisation (14%), issue management (12%) and corporate public relations (12%) ranked highest amongst respondents when asked which three tasks/roles had significantly decreased over the past two years.





DIVERSITY

“

When it comes to diversity and inclusion, there's good news and bad news. Roughly equal percentages of men and women have received pay rises over the past twelve months. Those pay rise levels haven't been at the same for the two groups. And we have to do much more to address the issue of women in leadership roles. Clearly respondents feel that we have fallen behind on this issue in 2022 compared to last year, and the industry collectively has to address this issue.

”

Alex Malouf
Communications Practitioner and
PRCA MENA Board Member

“

Meritocracy is fast challenging the notion of social mobility. Talent combined with effort is quickly displacing social position at birth as a key enabler in professional progression. Employers will need to shift past the traditional metrics such as education and country of origin, and consider soft skills such as emotional intelligence and entrepreneurial mindsets as key indicators of viability in the hiring process.

”

Amel Osman
Associate Partner
Instinctif Partners

“

Diversity and inclusivity are at the heart of every successful business. Organisations here are taking important steps forward to develop workplace policies that ensure employees feel empowered, respected and valued. The pandemic may be in the rear-view mirror today, but the world still faces a cocktail of chaotic global challenges that that will affect business of all sizes. It's essential that communicators embrace the extraordinary diversity of cultures, experiences and perspectives we have in the region to cut through the noise and navigate this fast-changing environment.

”

Imad Lahad
Managing Director, Dubai; Head Of AI Comms Lab;
Global Digital Practice Co-Lead
APCO Worldwide

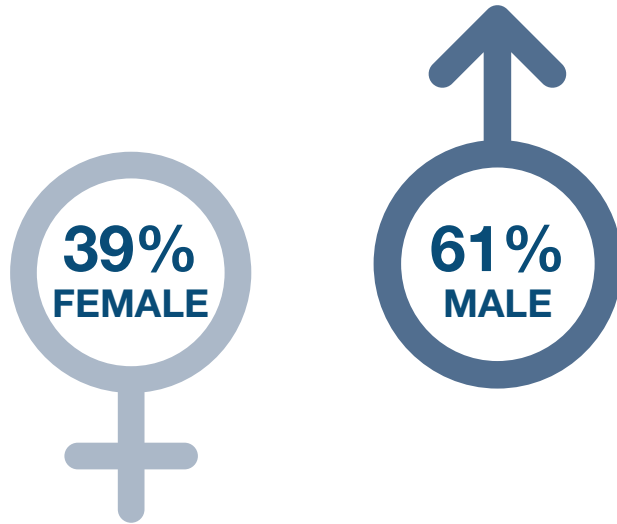
Diversity

GENDER

The global PR industry is predominantly female, with percentages hovering around two-thirds female in other regional PRCA PR Census reports. This was largely true for the MENA region in 2021.

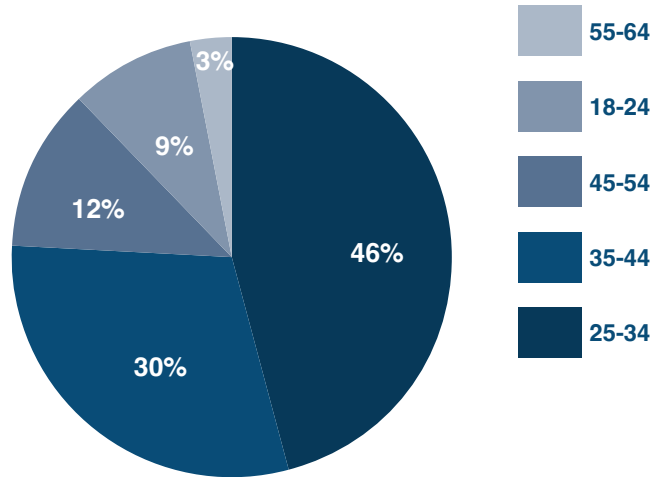
However, in 2022, 61% of the PRCA MENA Census' respondents were male and 39% were female.

Although this may not be indicative of the gender demographics at large, it is worth noting as we reflect on the findings throughout the report.



AGE

Overall, 46% of practitioners responding to this survey are aged between 25 and 34. The next most common age range is 35–44-year-olds (30%). This is followed by 45–54 year-olds (12%), 18–24 year-olds (9%) and 55–64 year-olds (3%).

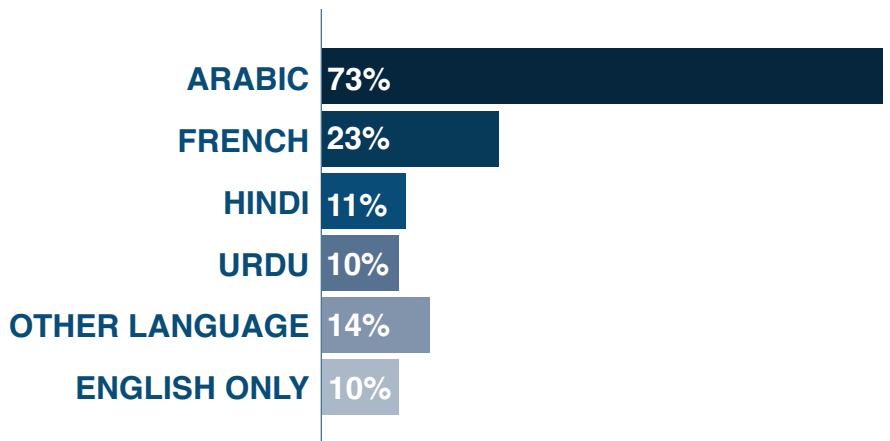


LANGUAGE

We asked respondents if they spoke any languages – other than English – well enough to conduct a business-related conversation.

The vast majority (73%) said that they speak Arabic, while French (23%), Hindi (11%) and Urdu (10%) were also popular choices.

Only a minority (10%) said that they do not speak any other languages in addition to English.



DISABILITY

When asked if respondents considered themselves to have a disability, 19% selected 'yes'. This presents a substantial increase, as in the 2021 iteration of the Census, this figure stood at a mere 1%. Two positive inferences can be made about this significant increase: firstly, the profession may have grown positively to ensure that the workplace is more inclusive for people with disabilities, thus facilitating more employees with disabilities. Secondly, attitudes around disability may have improved within in the profession and/or region, meaning that more people are comfortable with opening up about their disabilities.



19%*

Disabled practitioners

81% stated they do not have a disability

***+18% increase since the 2021 Census**

EDUCATION

The vast majority of respondents have obtained either a first (50%) – i.e., a Bachelors – or higher level (25%) degree, such as a Master's, MBA, or Doctorate. Going beyond this, 9% said secondary school was their highest level of education, 7% said they had a vocational college education, 6% said they had a professional higher education, 2% said elementary school was their highest level of education and 1% reported having none of these.



- 50% BACHELORS OR FIRST**
- 25% HIGHER-LEVEL DEGREE**
- 9% SECONDARY SCHOOL**
- 7% VOCATIONAL COLLEGE**
- 6% PROFESSIONAL HIGHER EDUCATION**
- 2% ELEMENTARY SCHOOL**
- 1% OTHER**

SOCIAL MOBILITY

In order to build a better picture of social mobility across the industry, we asked practitioners about their parents' education. The majority (60%) stated that their parents had a university degree, while 32% stated that their parents did not. 8% were either not sure or preferred not to say.

PARENTS OF PR PRACTITIONERS' EDUCATION TITLES



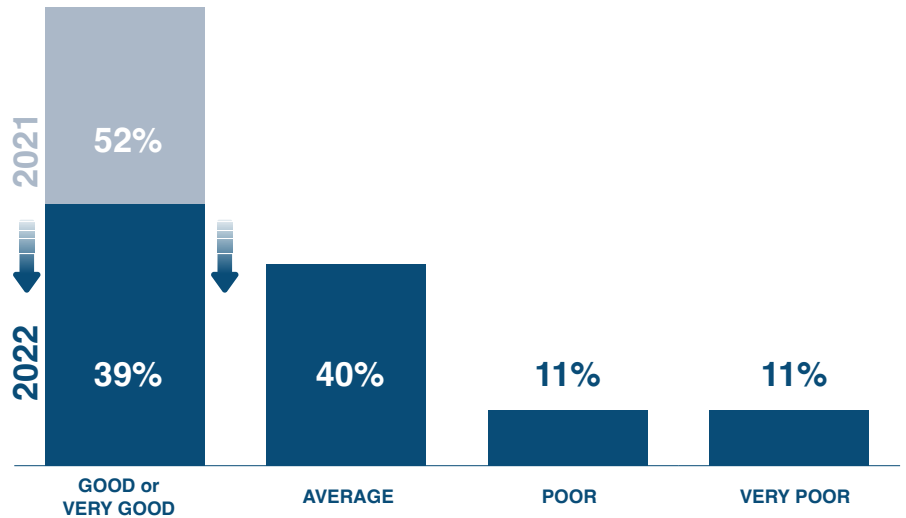
- 50% UNIVERSITY DEGREE**
- 32% NO HIGHER DIGREE**
- 9% PREFER NOT TO SAY**

WOMEN IN LEADERSHIP

Interestingly, when asked to rate the PR and communications industry’s approach to promoting women to leadership positions, the combined pick rate of ‘good’ and ‘very good’ has reduced – going down from 52% in 2021 to 39% in 2022. This figure is even lower when broken down by female respondents (37%). Beyond that, 40% of respondents rated the approach as average, and both ‘poor’ and ‘very poor’ were selected 11% of the time.

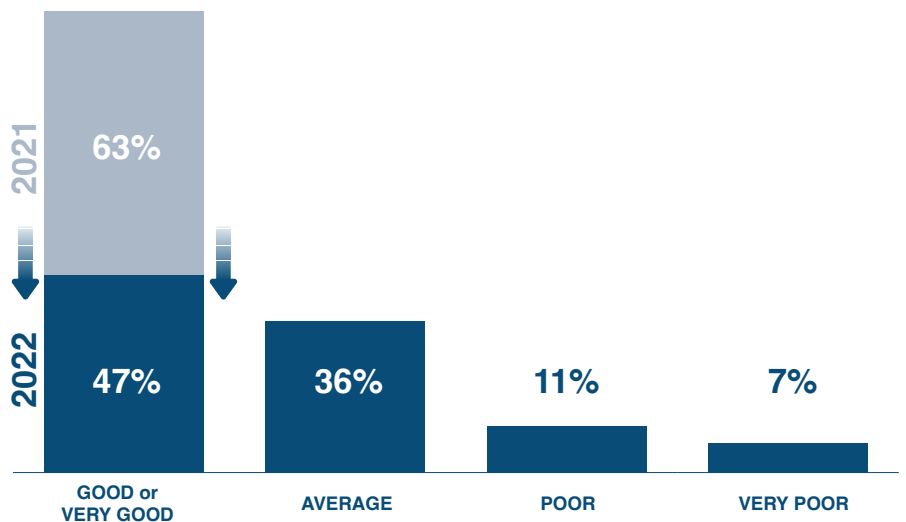
Ultimately, this could signal that the industry has gone backwards in the past year and that there is much work to do to bridge the gap between men and women in leadership positions.

PR INDUSTRY’S APPROACH TO PROMOTING WOMEN TO LEADERSHIP POSITIONS



Although respondents are more positive about their own organisations approach to promoting women to leadership positions, the narrative remains the same. When questioned on this, there was an 16 percentage point decrease from 63% to 47% for the combined pick rates of ‘good’ and ‘very good’. 36% said that their organisation had an ‘average’ approach to promoting women to leadership positions, 11% said it was ‘poor’ and 7% said it was ‘very poor’.

RESPONDENTS’ ORGANISATIONS APPROACH TO PROMOTING WOMEN TO LEADERSHIP POSITIONS



MENTAL HEALTH ISSUES

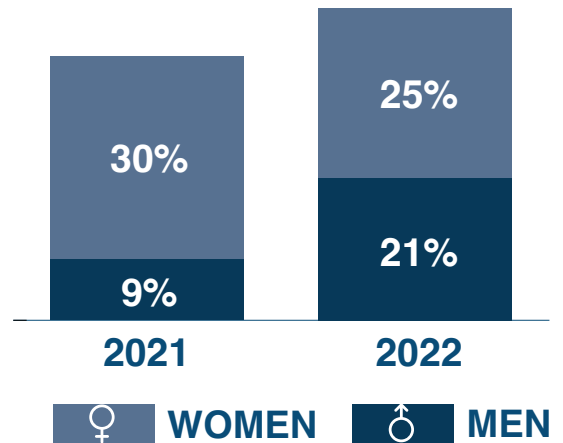
Respondents were asked whether they had ever suffered from or been diagnosed with a mental health illness. In total, 23% of respondents stated that they had – this figure is the same as in last year’s MENA Census.

A noteworthy point is that whilst the overall figure has remained the same, the gap between the number of men and women reporting a mental health illness has reduced significantly.

Last year, only 9% of men reported having had a mental health illness and 30% of women reported the same, however, this has changed to 21% and 25% for men and women respectively in 2022. This could potentially signal a positive shift away from the stigma that men face when it comes to mental health.

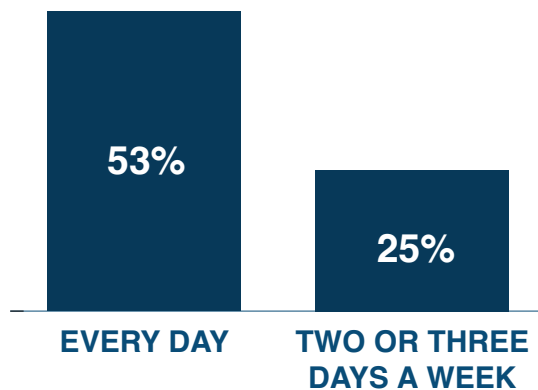


23%
of total respondents have suffered from or been diagnosed with mental ill health in the past 12 months



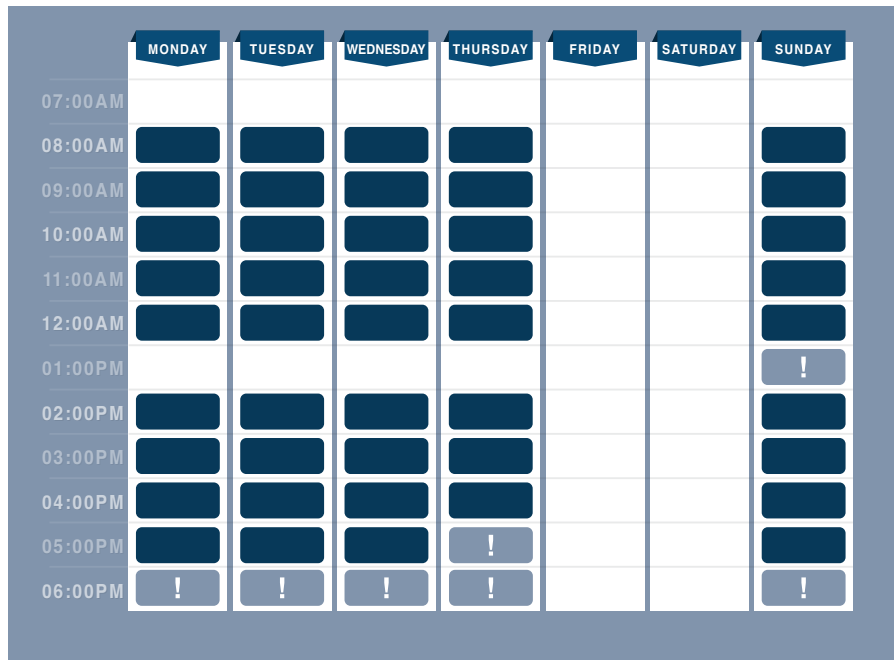
In addition to this, mental wellbeing should clearly remain at the forefront of the agenda for employers within PR and Communications. This is because PR employees continue to face increasing pressures outside their immediate role. In fact, 53% of respondents reported having to make work related calls and/or send work related emails outside of office hours every day, and 25% reported having to do so at least two to three days a week.

PR EMPLOYEES HAVING TO MAKE WORK RELATED CALLS AND/OR SEND WORK RELATED EMAILS OUTSIDE OF OFFICE HOURS



Also, the mean value of contracted hours for PR and Communications employees amounted to 40 hours a week, whilst their actual hours worked amounted to 47.1 hours.

MEAN VALUE OF CONTRACTED WORKING HOURS (40 HRS)
VS.
ACTUAL WORKED HOURS A WEEK (47.1 HRS)



“

Salary and bonus increases signal the imperative role which the PR and Communications industry play across the MENA region, specifically given the transformative and global position which countries aim to achieve. Furthermore, several additional factors have been considered by organisations in relation to remuneration adjustments, which include, post-pandemic realignment, increase in inflation rates and cost of living.

Firms have used increased remuneration packages as part of their retention strategy to avoid a talent crisis.

”

Mandip Dulay
Chief Strategy Officer and Founder
IMPACT-ME Group

“

Adopting an entrepreneurial mindset, at any level of an organisation, is going to be critical to personal, organisational, and commercial growth. It is important that employers foster a sense of entrepreneurship within the company. Transparency on salary bands and attainment standards will mean that employees know exactly what is expected from them, those they manage, and those they report into. It will also ensure management are equipped with the necessary tools to evaluate performance and reward accordingly, systematically, and consistently, across the organisation. Closing the pay gap is also another area of focus to be considered. This will foster an environment where employees are compensated with clear parameters of performance, in turn leading to better visibility of career growth and ultimately retention, which is a key challenge for the industry today.

”

Amel Osman
Associate Partner
Instinctif Partners

**PAY
& PERKS**



Pay and Bonuses

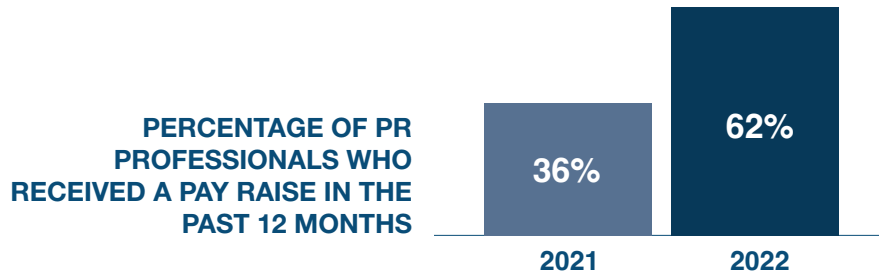
PAY AND BONUSSES

When compared to 2021, a significantly higher proportion of PR professionals based in MENA stated that they had received a pay rise in 2022. The previous year's figure stood at 36%, whilst this year, 62% stated that they received a pay rise. Interestingly, 25–34 year-olds (70%) most commonly reported receiving pay rises and was followed by 35–44 year-olds (59%), 45–54 year-olds (56%), 18–24 year-olds (45%) and 55–64 year-olds (38%).

There is a similar increase when considering respondents that reported receiving a bonus payment in the past financial year. 57% of respondents stated that they had received a bonus in 2022, signalling a sizeable 33% increase when compared to 2021.

A noteworthy point is that 65% of 18–24 year-olds reported to have received a bonus, which was followed by 63% of 45–54 year-olds, 58% of 25–34 year-olds, 52% of 35–44 year-olds and 38% of 55–64 year-olds. Another interesting point is that the size of the bonus received generally reduces as your rise through the age ranges.

Overall, the increase in salaries and bonuses signal the rise in prominence of the PR and Communications industry within the MENA region and signal the effective bounce back from the implications of COVID-19.



BREAKDOWN OF THE RECIPIENT AGE BRACKET FOR PAY RAISES IN THE PAST 12 MONTHS



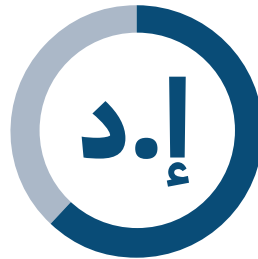
GLOBAL GENDER PAY GAP

The PRCA MENA Census delves into a potential pay gap within the PR and Communications industry through exploring pay rises and bonus pays.

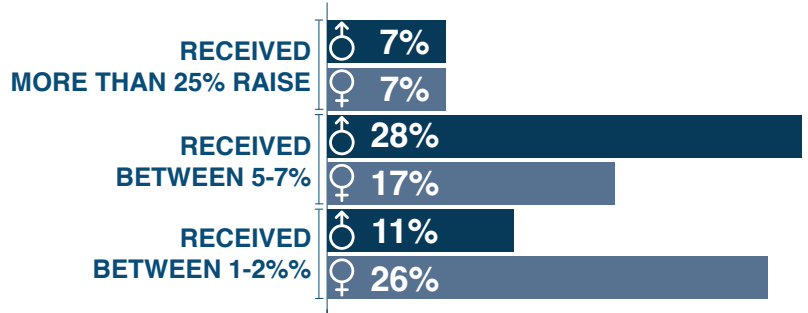
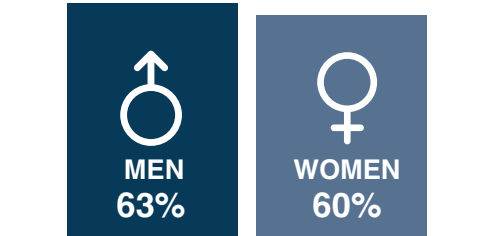
When asked about pay rises within the last 12 months, 62% of respondents reported obtaining one. Breaking this figure down by gender reveals largely similar results; 63% of men and 60% of women reported a pay rise. Regarding what percentage of increase respondents received, results were similar at the top-end, for example, 7% of men and women reported receiving a bonus of more than 25%. There were notable differences in the mid-range, with 28% of men reporting to have had 5-7% pay rise and only 17% of women reporting the same. Finally, at the bottom-level of pay rises, 11% of men reported a 1-2% pay rise, whilst 26% of women reported receiving the same. Overall, whilst there is no real difference in pay rises at the top-end, women are far more likely than men to receive a small, as opposed to a medium-sized, pay rise.

57% of respondents said to have received a bonus payment in the past financial year. Male respondents were found to be 10% more likely to receive a bonus payment, with 61% declaring a payment of this kind, whilst only 51% of women declared the same. Interestingly, the mean value of bonus payment for women was found to be significantly higher than that received by men; the mean value for all female respondents stood at 10,587 USD, whilst this went down to 3,770 USD for male respondents.

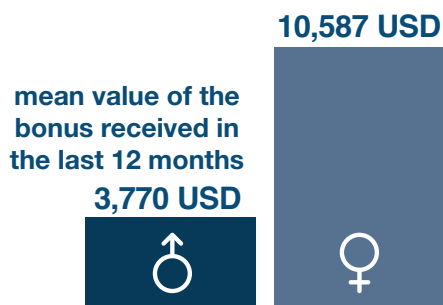
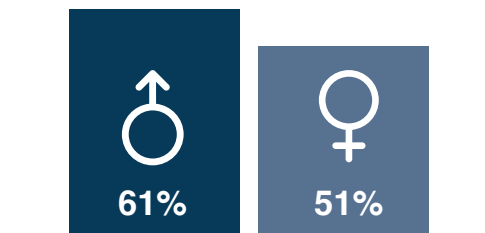
Ultimately then, although women are less likely to receive a bonus, when they do, it amounts to a far higher sum to that of their male counterparts. This is in direct contrast to pay rises, where men and women have an almost identical rate of receiving pay rises, yet women are far more likely to receive a small pay-rise. The gender pay gap then is relatively unclear within the PR and Communications sector in MENA. However, this can be caveated by the fact that base salaries were not captured as part of this study and as a result, a specific pay gap percentage could not be calculated.



62%
of respondents
received a pay rise in
the last 12 months

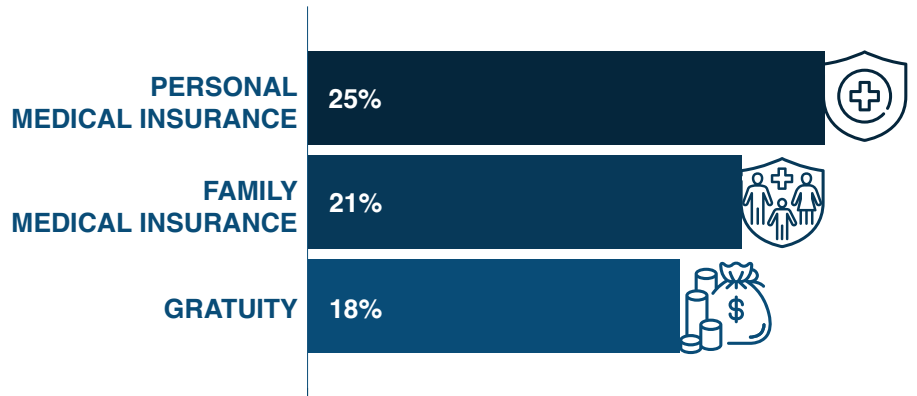


57%
of respondents
received a bonus in
the last 12 months



BENEFITS

In addition to base pay and bonuses, practitioners receive a wide array of financial and non-financial benefits. 86% of respondents said they receive at least one of the benefits that were listed in our survey. The top-three most commonly received benefits were personal medical insurance (25%), family medical insurance (21%), and gratuity (18%).







The Public Relations and Communications Association (PRCA) is the world's largest professional PR body.

Based in the UK, we represent more than 35,000 PR professionals in 82 countries worldwide.

With offices in London, Hong Kong, Dubai, Singapore, and Buenos Aires, we are a global advocate for excellence in public relations.

Our mission is to create a more professional, ethical, and prosperous PR industry. We champion – and enforce – professional standards around the world through our Professional Charter and Code of Conduct. The Code compels members to adhere to the highest standards of ethical practice.

We deliver exceptional training, authoritative industry data, global networking, and development opportunities.

We also manage the International Communications Consultancy Organisation (ICCO) – the umbrella body for 41 PR associations and 3,000 agencies across the world. Additionally, we support the delivery of the Motor Industry Communicators Association (MICA).