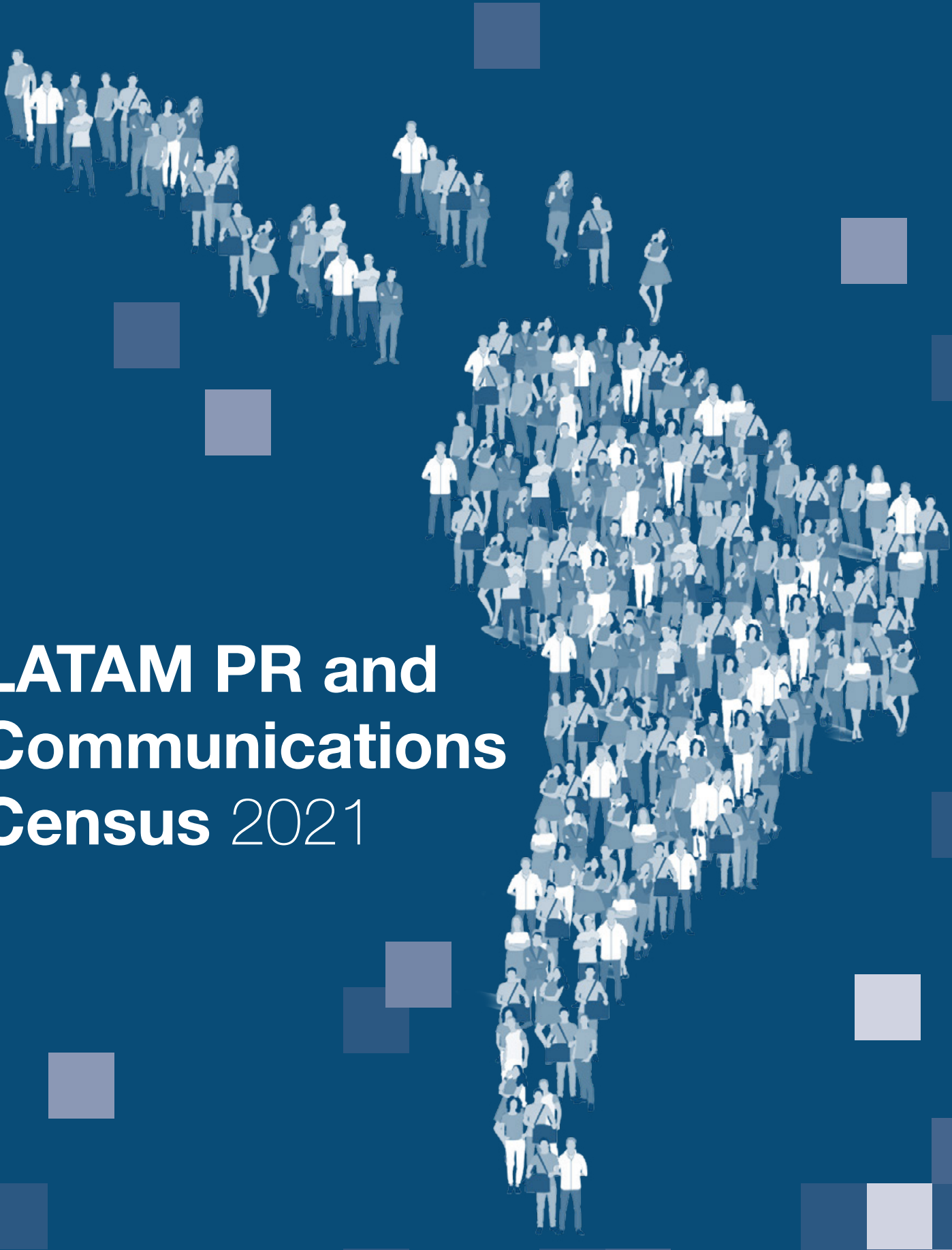




LATAM PR and Communications Census 2021



A DATA INTELLIGENCE COMPANY FOCUSED ON BUSINESS RESULTS

WE ARE PART OF UNTOLD_ ECOSYSTEM,
SPECIALISTS IN MARKETING AND COMMUNICATION.

Our studies measure the impact of brand communication as well as corporate communication on the company's reputation across different stakeholders.

We identify trends and social economic contexts to help develop strategies.

We are specialized in understanding people at a deep level and integrate data, strategy and content to impact business results.

IF YOU WANT TO GET TO KNOW MORE OF OUR WORK,
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Foreword

FRANCIS INGHAM MPRCA
Director-General, Public Relations
and Communications Association

“We are very proud of the work we have already done - despite the pandemic's challenges - to promote networking, training, ethics and best practice across LATAM's PR and communications profession.”

When the PRCA launched in Latin America in late 2019, we never imagined the circumstances in which we would operate during the next few years. We are very proud of the work we have already done - despite the pandemic's challenges - to promote networking, training, ethics and best practice across LATAM's PR and communications profession.

Our work has been so successful that we have expanded our offering to reflect our growing number of members in Latin America and in North America, creating PRCA Americas. This report is an important part of our mission - our global and regional censuses are the landmark analyses of our industry, region-by-region. They offer unparalleled insight into where we are now, and where we are heading.

I'd like to thank Gustavo, the region's Chair, as well as the rest of the regional Board, and everyone who has helped to shape not just this report, but PRCA Americas as a whole.

METHODOLOGY

The PRCA Americas LATAM Census is based on a sample of 200 respondents from across the region, with data gathered between 22nd April and 21st June, 2021.

The online survey was generated by Quiddity using two different sample sources:

- Targeted sample sent to PRCA members and other organisations
- Public link on the PRCA Americas website



Introduction

Gustavo Averbuj CMPRCA
Chair, PRCA Americas
CEO, Ketchum Argentina & Partner / Regional Director,
Ketchum Latin America

“United as an industry in the newly-created PRCA Americas, we are ambitious about what we can achieve”

Welcome to PRCA's first LATAM PR and Communications Census.

It would be wrong not to begin by addressing the plight we have faced not just on this continent, but globally, during the COVID-19 pandemic.

Alongside the suffering and illness it has caused those families affected by the disease, COVID-19 has forced many of us to change the way we live and work. With government-enforced lockdowns, and worries over the health of loved ones, it has never been more important to us as an industry to critically analyse the way in which we look after the mental health of our friends and colleagues.

The pandemic has also meant some employers making the difficult decision to let staff go - although the numbers of companies making redundancies, and the proportion of staff that left those companies, are not as bad as we might have feared when the crisis began.

But in the face of these hardships, the PR and communications profession has continued to innovate and consider the best ways to create

positive change for colleagues, clients, and all those we work with - not just for now, but for the post-pandemic world.

This report suggests that leaders in PR and communications are already rising to the challenges of taking care of the mental health and wellbeing of practitioners, as well as creating diverse and inclusive professional environments.

By asking questions around these sensitive and important topics, we can learn together as an industry by firstly analysing where we currently are in terms of addressing these issues, before secondly determining where we can improve and finally implementing real, tangible change. As an organisation, the PRCA's aim is to see an improvement year upon year where staff at all levels are feeling safe, valued and happy in the workplace; as well as feeling supported whenever they have any issues.

United as an industry in the newly-created PRCA Americas, we are ambitious about what we can achieve. We hope that you will find this report to be insightful and useful.

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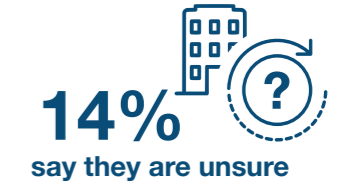
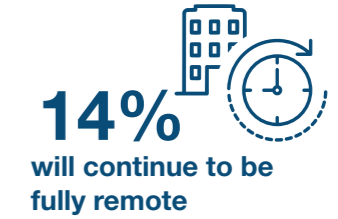
State of the profession

PR agencies and other companies have had to respond to the challenges of COVID-19 on two main fronts: remote working, and redundancies in some cases.

REMOTE WORKING

Most of the respondents are working remotely full-time (85%), and just 4% are permanently in the office. A further 11% are working remotely part-time.

This is likely to change when the economy reopens fully. Although only 8% of respondents expect to be back in the office full-time, 63% expect a mix of remote and office working, while 14% will continue to be fully remote. Another 14% say they are unsure.



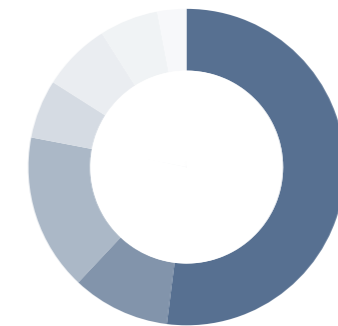
REDUNDANCIES

It has been a difficult year for many businesses, and nearly a third (30%) of respondents said their company had made people redundant due to the COVID-19 crisis.

As for how many redundancies had been made, half of companies (52%) making redundancies said it was less than 10% of staff, 10% said it was 10%-20% and 16% said it was 21%-30%.



If your company made redundancies since March 2020, what proportion of staff were laid off?



- Less than 10%: **52%**
- 10%-20%: **10%**
- 21%-30%: **16%**
- 31%-40%: **6%**
- 41%-50%: **7%**
- More than 70%: **6%**
- I don't know: **3%**

WORKING ENVIRONMENT

Despite the uncertainties created by COVID-19, most PR professionals seem happy in their work - 38% said their company creates a very good working environment, 43% say it is 'good', 17% said it is 'neither good nor bad' and just 3% think it is bad. Those who work in agencies are particularly likely to feel positive about their working environment.

However, more than one in three women (37%) and one in five men (22%) claimed to have suffered harassment of some form in work, including bullying (6%) and sexual harassment (5%).



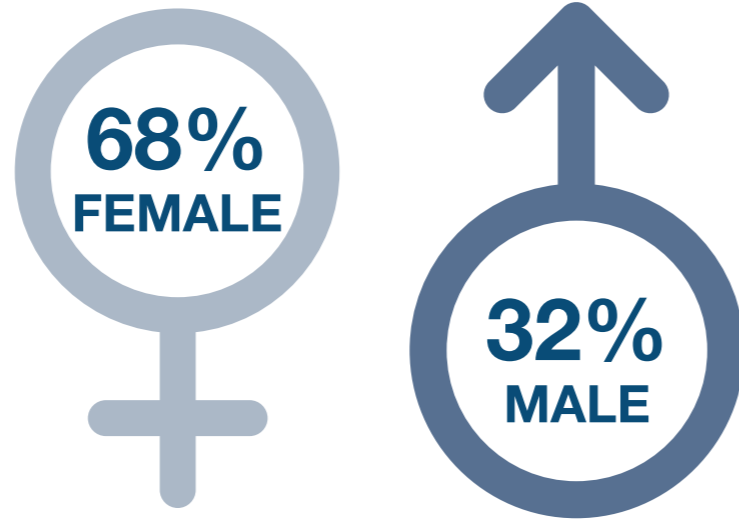
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Diversity

GENDER

The PR and communications profession industry is predominantly female, with 68% of respondents identifying as female, and 32% as male. This is identical to the split seen in the 2020 UK Census, and similar to that seen in other regions.

Despite being in the minority, male respondents were more likely to occupy more senior positions - a trend we also see elsewhere in the PR world. And we also see in this report that women are less likely than men to feel confident they are being paid a salary that is above the market average - and less likely to feel positively towards both their working environment, and their company's diversity efforts.



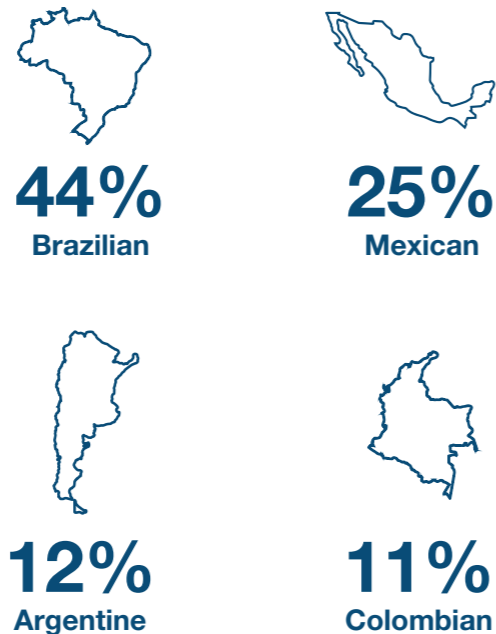
AGE

The most common age range of the practitioners is 35-44 years old (32%), closely followed by 25-34 year olds (31%), then 45-54 years old (18%), 55-64 years old (9%), 18-24 years old (8%) and finally 65+ years old (1%).



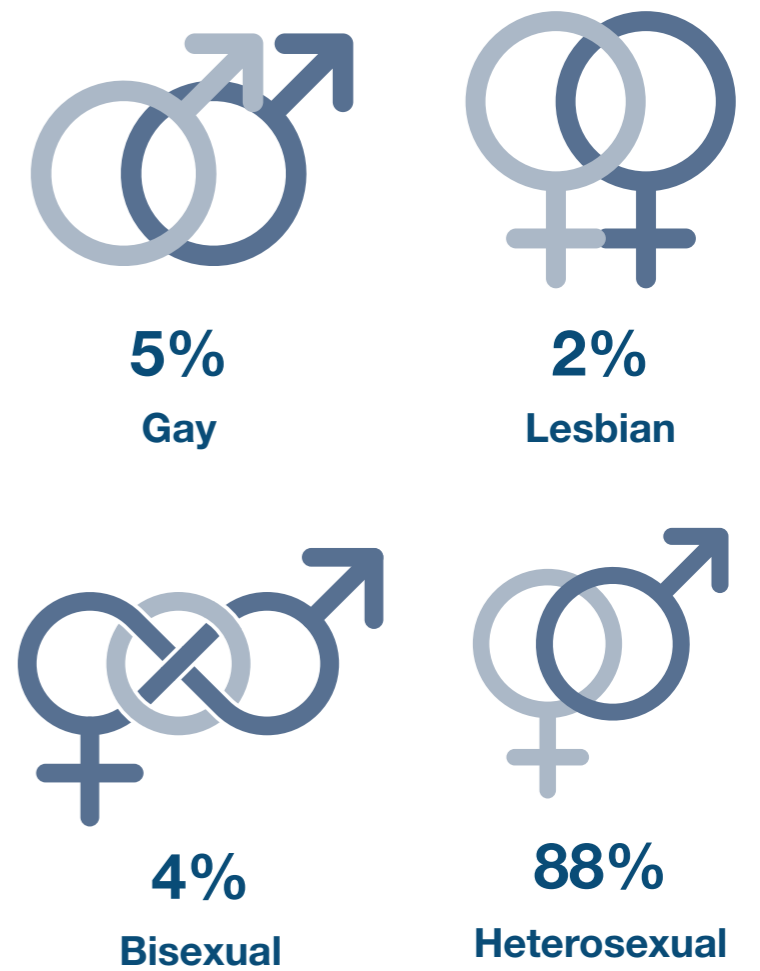
NATIONALITY

Nearly half of participants (44%) are Brazilian. The other major nationalities represented are: Mexican (25%), Argentine (12%) and Colombian (11%). Another 6% of respondents had another Latin American nationality, and 2% were of a nationality from outside LATAM.



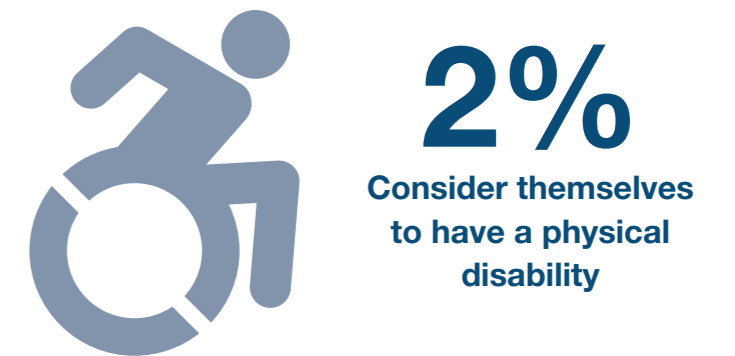
SEXUAL ORIENTATION

Respondents are predominantly heterosexual with 88% of practitioners identifying as such - meanwhile 5% identify as a gay man, 4% as bisexual, 2% as a lesbian or gay woman, and 1% chose not to disclose. These figures are similar to those in previous UK Census reports.



DISABILITY

Only 2% of the industry consider themselves to have a physical disability - much lower than the figures for the general population, with up to 12% of people in Latin American having a disability, according to other sources. People with disabilities are also underrepresented in other PRCA regional censuses.



EDUCATION

The majority of respondents (65%) attended an independent or fee-paying school. This is followed by a state run or funded non-selective school (27%), an independent fee-paying school with scholarships (7%), and a school abroad (1%).

We asked practitioners what was the highest level of education they had completed, and they answered: undergraduate university degree (45%), postgraduate degree (33%), MBA (14%), Doctorate/PHD (3%). Only one respondent said high school.

45%

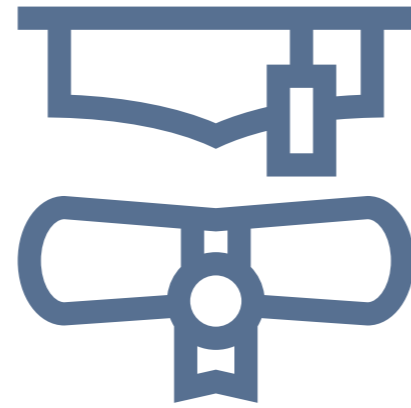
have an undergraduate degree

33%

have a postgraduate degree

14%

have an MBA



SOCIAL MOBILITY

To build a picture of social mobility across the industry, we asked practitioners about their parents' education, and the main source of income for the household in which they grew up.

One in eight (12%) said the highest level of education their parents had attended was basic education (primary/elementary school), 10% said high school/secondary education, 7% said professional/technical training, 45% said undergraduate, and 23% said postgraduate (including MBAs and doctorates).

Nearly a quarter of practitioners (23%) grew up in a household where the main income earner had a higher managerial or leadership position role. This is followed by 20% saying mid management, 12% saying junior level of management and 29% saying the main earner was an entrepreneur, business owner or freelancer. While either 13% answered 'other' or did not answer, just 2% said the main earner was a pensioner or retired, and just 1% said they were a beneficiary of social plans or an informal employee.

MAIN INCOME EARNER IN HOUSEHOLD DURING CHILDHOOD:



23%

higher managerial / leadership position



20%

mid management



12%

junior management



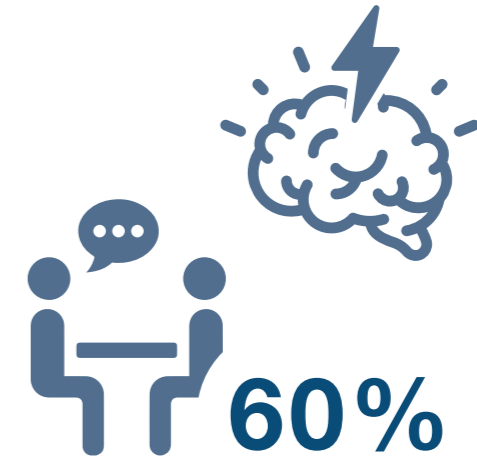
17%

entrepreneur / owned own business

MENTAL HEALTH

When asked if they had ever suffered from or been diagnosed with mental ill health (such as depression, anxiety, panic attacks and others), 23% of respondents said they had - 3% preferred not to answer, but the rest (74%) had not.

Asked if they felt able to talk to a manager or senior colleague about mental health problems, 60% said they could - 29% said a definite 'no', while 11% responded 'I don't know'.



23%

have suffered from or been diagnosed with mental ill health

60%

felt able to talk to a manager or senior colleague about mental health problems

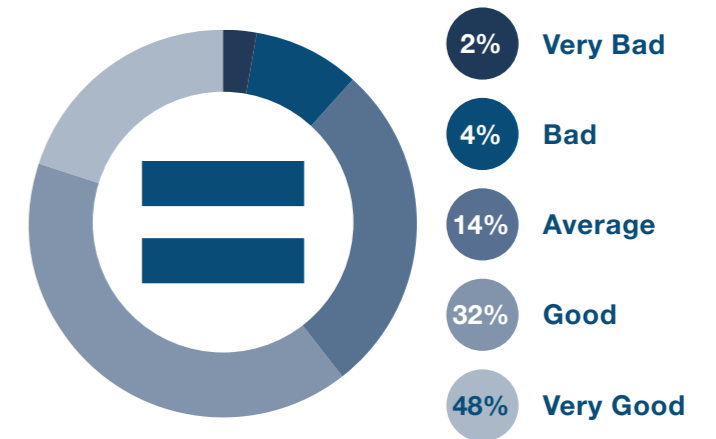
WORKPLACE DIVERSITY AND INCLUSION

We asked practitioners to rate their organisation's performance of promoting diversity and inclusion in the workplace.

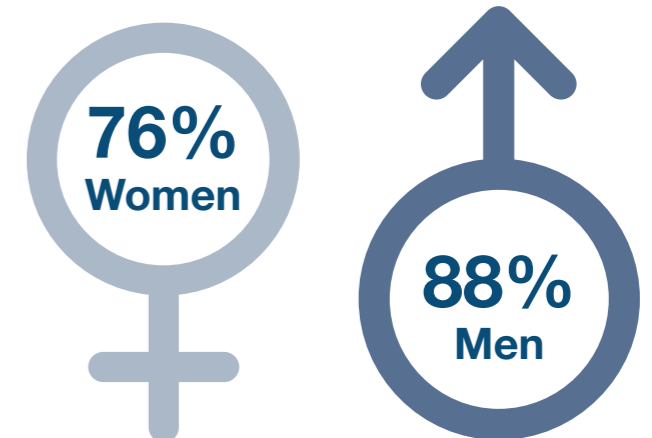
Nearly half (48%) of respondents said that their organisation's approach was 'very good', 32% said it was 'good', 14% said 'neither bad nor good', 4% said it was 'bad' and 2% said it was 'very bad'.

Men were more likely than women to rate their organisation's approach in promoting diversity and inclusion in the workplace as 'good' or 'very good' (88% versus 76%).

HOW WOULD YOU RATE YOUR ORGANISATION'S APPROACH IN PROMOTING DIVERSITY AND INCLUSION IN THE WORKPLACE?



HOW LIKELY TO SAY 'GOOD' OR 'VERY GOOD'



3

Salaries

THE 13TH SALARY

Three in five (62%) respondents receive an 'aguinaldo' (a '13th salary', often paid at Christmas) in addition to their regular monthly salary. A third (34%) do not receive this, while 5% preferred not to answer.



PAY RISES

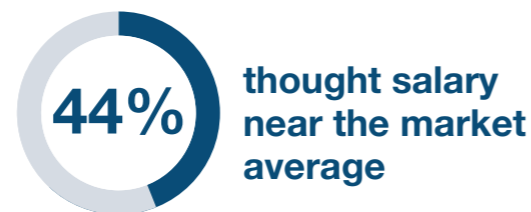
Only 43% of LATAM PR professionals said that they got a pay rise in the last year. The remaining 57% did not.



PAY PERCEPTION

We asked respondents if they thought their salary was higher or lower than the market average. While 44% thought it was near the market average, 19% said it was higher than average and 25% said it was lower, with others not knowing or not answering.

It is important to note that women are less than half as likely as men to think their salary is above average (14% versus 31%).



AVERAGE SALARIES

We asked respondents what their monthly salary was. While 7% declined to answer, those that did respond said:

LESS THAN US\$899	16%
US\$900 – US\$1,499	20%
US\$1,500 – US\$1,999	11%
US\$2,000 – US\$2,499	6%
US\$2,500 – US\$2,999	8%
US\$3,000 – US\$3,499	4%
US\$3,500 – US\$4,499	4%
US\$4,500 – US\$6,999	11%
MORE THAN US\$7,000	13%



GENDER PAY GAP

When looking at gender differences, we see that women are nearly twice as likely than men to earn less than US\$2,000 per month.

	Male	Female
LESS THAN US\$899	9%	19%
US\$900 – US\$1,499	11%	24%
US\$1,500 – US\$1,999	12%	10%
US\$2,000 – US\$2,499	8%	5%
US\$2,500 – US\$2,999	3%	11%
US\$3,000 – US\$3,499	5%	3%
US\$3,500 – US\$4,499	3%	4%
US\$4,500 – US\$6,999	18%	8%
More than US\$7,000	17%	11%



CONSULTANCY VERSUS IN-HOUSE

Respondents also appear more likely to earn more money if they work in-house, rather than in an agency.

	Agency	In-house
LESS THAN US\$899	17%	18%
US\$900 – US\$1,499	22%	18%
US\$1,500 – US\$1,999	12%	9%
US\$2,000 – US\$2,499	6%	6%
US\$2,500 – US\$2,999	10%	6%
US\$3,000 – US\$3,499	3%	6%
US\$3,500 – US\$4,499	3%	4%
US\$4,500 – US\$6,999	7%	23%
More than US\$7,000	11%	5%

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