

**Comunità professionale allargata:
quanti siamo nel mondo? Quanto valiamo?**

Eupreva - maggio 2002

Le relazioni pubbliche sono attività labour intensive e non vanno calcolate come la pubblicità che è prevalentemente capital intensive. Per stimare il numero dei professionisti occorre anche includere quelli che operano nel settore pubblico e nel settore sociale.

Till this day, the public relations market evaluation in most countries is decided by market research methodologies based on the private sector being the totality of the market. This is obviously unreliable as we all know that the private sector counts for not more than 50% of the overall market, which also includes the public sector and civil society.

Also, the methodology - similar to the one used for advertising - is based on the estimate of allocated budgets. This again appears to be highly questionable as we realise that public relations involves highly labour intensive activities based on relationships and not on media space acquisition for the insertion of unilateral, asymmetric messages erga omnes.

In order to try and avoid recurrent ambiguity about real or unreal market dynamics (i.e the market is in crisis if Martin Sorrel from WPP says so, while public and civil society sectors are booming in every country and young people flock the profession as never before...), it seems relevant for professional associations as well as researchers and academics in public relations to assume direct responsibility in detecting monitoring approaches which adequately take into account our professional specificities.

A possible starting point could be, as is done for other labour intensive activities, to estimate the number of professionals.

In Italy, Ferpi tried this exercise in the year 2000 profiting from the Government decision (for the purpose of applying a specific law addressed at public sector communicators) of performing a detailed internal census, and revealed a staggering number of 40 thousand of them. More recently (2003) the association of public communicators has indicated that number in 60 thousand...the increase, according to the source, also being an effect of the law of 2000.

Based however on that 40 thousand number for the year 2000, Ferpi proceeded to estimate 15 thousand operators in the private sector. This number is the result of an extrapolation from the 3 thousand billion lira a year expense of companies in public relations estimated by UPA/Intermatrix, a long standing and authoritative annual research (the first edition dates to 1981) promoted by the association of italian advertisers (companies who advertise). The figure of 15 thousand is reached if you multiply by three a gross individual cost of 70 milion lira (in the accepted principle that in the service economy employment is not productive if it does not induce investments triple of gross salary). Proceeding in this exercise Ferpi identified 10 thousand operators in the solo, small and large agency consultants, based on the one thousand employees or full time collaborators working in agencies belonging to Assorel (member of ICCO) and this organisation's claim to represent 10% of the overall consultancy market. A final 5 thousand operators were gestimated as operating in the civil society sector considering that there are 500 thousand of these registered organisations in Italy (called onlus) and that all experts agreed that at least one in one hundred had a full time person dedicated to public and media relations and/or to fund raising activities.

So, by adding up 40 to 15 thousand to 10 thousand to 5 thousand you come up with a figure of 60 thousand for the year 2000 in Italy. Furthermore, accepting that the public sector and the civil society sectors have significantly grown in these last two years while the other two have remained stable, we are probably closer to 80 thousand than we are to 70 thousand. The overall population being 60 million, you would say that one Italian in 1000, at least, is a public relations operator.

If you extrapolate the methodology and apply it to other parts of the world, you will probably want to segment at least three macro-areas:

- a- the anglosaxon area (USA, Canada, UK, Australia, South Africa, New Zealand...) for a total of some 500 million inhabitants, where public relations are strongly pervasive and where one could estimate 1 operator per 700 inhabitants, for a total of 700 thousand operators.
- b- the european and asian tiger areas for a total of some 600 million inhabitants where public relations activities have been rapidly consolidating over the past twenty-fifty years and where one could probably apply the italian formula of one per 1000. This would give a figure of another 700 thousand.
- c- the 'rest of the world' area for a total of some 4.5 billion inhabitants where public relations is still a profession in infancy and where one could estimate a presence of 1 operator every 5000: i.e. 900 thousand operators.

The sum of this, for 2000, would give an overall number of 2.3 million which, considering a 10% annual increase ratio, would lead us to an estimated today number of some 3 million public relations practitioners in the world.

As much as this might appear far off for many, surely those who professionally indulge in economic, market research and forecasting techniques will consider these liberties more than acceptable and certainly more based on credible figures than most other estimates which are generally considered unquestionable....

A second question one can now begin to answer (if the previous argument is, of course, sustainable) is: what is the size of the overall inducted annual monetary value of public relations activities?

If one accepts that it makes little or no sense to estimate allocated budgets, being our activities so labour intensive, one must consequentially begin from estimating the gross costs of practitioners for organisations of every type and multiply this value by three for the same reasons explained in the previous effort related to estimating the number of private sector practitioners cited in the Italian example.

Also, one must recoup the three macro-areas of the world example, because it is realistic to assume that the annual gross costs substantially differ: i.e. 75 thousand dollars for the anglosaxon area, 50 thousand dollars for the european/asian tigers area and 25 thousand dollars for the rest of the world area. Accepting this, and multiplying these figures by three (this has no particular reason to change...) one arrives at the overall figure, related to this year, of 330 billion dollars being invested by organisations through 3 million some practitioners in public relations activities in the world today.

This exercise is certainly questionable in its reasoning, but in no case inane, as it leads to a number of relevant implications:

- a) there is very large potential professional community out there in the world and associations, in the best of cases, only attract less than 10% of it (based on an estimate of some 250 thousand members world wide), are we performing an adequate role?

- b) if less than 10% of practitioners feel the need to belong to an established community, this does not necessarily mean they are the best. To the contrary, everyday experience indicates there large numbers of professionals who simply do not want to belong to professional associations, either because they do not recognize themselves as public relations operators or because they are not interested in the performance of professional associations. On the other hand it is evident that only a maximum of 10% of practitioners are 'somewhat' obliged to behavioural and ethical standards by having explicitly accepted the code of conduct of their respective association.

Small wonder we enjoy such a splendid reputation worldwide... although this does not mean that the full 90% of others behave unethically, quite the contrary:

- a) because the enforcement of the codes is practically nil;
- b) because many non members are in any case compliant to codes of their own organisations or just simply honest and ethical individuals.

So what?

Well, one course of action - explicitly saying that the 'barrier to entry' approach is dislikeable to say the least - could be that professional associations begin to realise that a proactive and intelligent, consensus based, approach to advocating soft/hard ex post regulation of specific public relations practices which, more than others, impact on the public interest, not only could help in avoiding an excess of irresponsible behaviours which greatly damage our reputation, but could establish associations as a point of positive attraction at least in that inner but substantial ring of the enlarged community not composed of amateurs or crooks, and – even more - help public and private policy processes leading to these regulations take into consideration the needs of their very members rather than taking a benign neglect attitude on practice regulation which only leaves decision makers free to decide what they wish and the professional community unrepresented at the decision table.

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Euprera - maggio 2001

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