Communication and Public Relations Agencies and Consultancies: Data and Facts for the Sector in Portugal

Agencias y Consultorías de Comunicación y Relaciones Públicas: datos y hechos del sector en Portugal

Fábia Ortega Borges [1] | ORCID ID
fborges@umaia.pt
Simone Antoniaci Tuzzo [2] | ORCID ID
santoniaci@umaia.pt
Universidade da Maia, Portugal

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Abstract

This article reflects the creation of an Observatory of Communication and Public Relations Agencies and Consultancies in Portugal, making it necessary to disseminate relevant data, among colleagues: academics, researchers, professionals, companies, and consultants.
By using the SABIO database, our study takes into consideration Portuguese companies registered with the Economic Activity Code 70210 [Consultancy, Public Relations, and Communication Activities] and collect their main characteristics, such as number of agencies; date of establishment; main and secondary activities; localization; business data; operating income; number and evolution of employees; inactivity of agencies; etc.
Having as a reference the European Communication Monitor, this research aims to define a set of variables and parameters that will be monitored periodically, to follow the evolution of the sector in Portugal and its adaptability to the needs of companies that hire this service to ensure their Communication and Public Relations needs, either as a complement to an in-door department, or as a permanent, periodic or occasional external service.

[1] Fabia Ortega Pereira is researcher from CECS - Center for Communication and Society Studies (UMinho) and CITEI (UMaia). Professor at the University of Maia, Porto, Portugal. ORCID ID: https://orcid.org/0000-0002-7599-8800. Main contact for editorial correspondence.
[2] Simone Antoniaci Tuzzo is researcher from CITEI (UMaia). Professor at the University of Maia, Porto, Portugal. ORCID ID: https://orcid.org/0000-0001-9401-6510

At this moment, our research have found 2033 companies registered in Portugal with the code 70210, but only 378 are currently active and indicate Public Relations and Communication as their main activity, with complementarity with many other economic activities. 82% of companies have been established in the last decade, corresponding to an increase of almost 70% of professionals working in the sector. 53% of the companies are sole proprietorships and 63% fully concentrate the business in Portugal. There is also a strong concentration of those agencies in Lisbon, the political and business capital of the country. Finally, the difficulty of consolidating the sustainability of these companies is also evident, considering that, at the universe of the companies that closed between 2006 and 2020, 71% closed before 5 years of operation.

Keywords: Communication and Public Relations Agencies, Consultancies, Portugal, Observatory, Communication Monitor.

Resumen

Este artículo refleja la creación de un Observatorio de las Agencias y Consultorías de Comunicación y Relaciones Públicas en Portugal, haciéndolo necesario como vehículo para la difusión de datos relevantes, entre colegas: académicos, investigadores, profesionales, empresas y consultores.

Mediante el uso de la base de datos SABI®, el estudio considera las empresas registradas en Portugal con el Código de Actividad Económica 70210 [Actividades de Consultoría, Relaciones Públicas y Comunicación] y recopila sus principales características, como el número de agencias; Fecha de fundación; actividades principales y secundarias; localización; datos comerciales; ingresos de operación; número y evolución de los empleados; inactividad de las agencias; etc.

Teniendo como referencia el *European Communication Monitor*, esta investigación tiene como objetivo definir un conjunto de variables y parámetros que serán monitoreados periódicamente, con el fin de seguir la evolución del sector en Portugal y su adaptabilidad a las necesidades de las empresas que contratan este servicio para asegurar sus necesidades de Comunicación y Relaciones Públicas, ya sea como complemento de un departamento interno o como un servicio externo permanente, periódico u ocasional.

En este momento, se ha encontrado que de las 2033 empresas registradas en Portugal con el código 70210, solo 378 están actualmente activas e indican Relaciones Públicas y Comunicación como su actividad principal, con complementariedad con muchas otras actividades económicas. El 82% de las empresas se han constituido en la última década, lo que supone un aumento de casi el 70%. El 53% de las empresas son unipersonales y el 63% concentran íntegramente el negocio en Portugal. También hay una fuerte concentración de esas agencias en Lisboa, la capital política y comercial del país. Finalmente, se evidencia la dificultad de consolidar la sustentabilidad de estas empresas, ya que, de las empresas que cerraron entre 2006 y 2020, el 71% lo hizo antes de los 5 años de existencia.

Palabras clave: Agencias de Comunicación y Relaciones Públicas, Consultorías, Portugal, Observatorio, Directorio de Comunicación.

Summary

Sumario

1. INTRODUCTION

The characterization of the Communication and Public Relations Agencies sector in Portugal is especially complex, given the difficulty of clarifying the identity of this academic and professional field, in a diversity of designations that makes the correct hiring of communication services difficult. The ambiguity in the terminology adopted in the branding of agencies (communication, marketing, PR, corporate issues, digital, image & reputation…), as well as in their functional areas and services provided, justifies a study that characterizes the sector.

The present study aims to follow up on pioneering attempts (Zerfass & Oliveira, 2013; Sebastião & Spínola, 2021) to characterize the professional institutionalization of Public Relations and Strategic Communication in Portugal, through an inventory of companies registered with the Economic Activity Code (EAC) 70210 - Consultancy, Public Relations and Communication Activities (INE, 2010) and present their main characteristics.

In a still initial state, this research pretends to be the first output for the creation of an Observatory of Communication and Public Relations Agencies and Consultancies in Portugal, inspired by the empirical and transactional study developed by the European Communication Monitor, preferably in conjunction with sector associations in Portugal, namely APECOM - Associação Portuguesa das Empresas de Conselho em Comunicação e Relações Públicas, APCE – Associação Portuguesa de Comunicação Empresarial, and APAP – Associação Portuguesa das Agências de Publicidade, Comunicação e Marketing) despite the apparent fragmentation and disintegration of *associativism* in this field of activity (Sebastião & Azevedo, 2014).

Recognizing the published studies by Zerfass and Oliveira (2013) or Sebastião and Spínola (2021), researchers and professionals lack a study that reflects the reality of this sector in Portugal: how many agencies and consultancies are there? where are they located? for whom do they work? how many professionals work in these companies? what's their profile? what are the privileged areas of activity and what has been their evolution? etc. Realizing the importance of other Monitors, which are also relevant research resources for academic and business projects, our Observatory should assume itself as a space for reflection and dissemination, which is, at the same time, a result and a resource for scientific research and business diagnostics, with clear benefits arising therefrom.

Figure 1. Observatório's Logo

Source: Own author

This article points out the *kick-off* of the Observatory of Communication and Public Relations Agencies and Consultancies in Portugal with a quantitative inventory of companies registered with the EAC 70210 and its main characteristics, such as the number; date of establishment; activities; localization; business data; operating income; number and evolution of employees; inactivity of agencies etc.

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Therefore, we recognize that, although preliminary, the results presented are extremely important as they are the first data so far, not reflected in any study on the Communication and Public Relations sector in Portugal, thus contributing to a reflection on its institutionalization.

2. THEORETICAL FRAMEWORK

Our main theoretical references are the annual reports of the European Communication Monitor (ECM) carried out since 2007, allowing, over time, the definition of new premises of Excellence in Public Relations (Sebastião & Spínola, 2021), while updating the studies by Grunig et al (2002), as well as articles that focus on specific categories and/or aspects of the ECM, for example at a national or regional level (Matilla, et al. 2014; Vázquez Gestal & Fernández-Souto, 2014; Costa-Sánchez et al, 2020; 2021), also extended to Latin America since 2014.

The ECM is the most comprehensive international empirical study on Public Relations and Strategic Communication, which in 2021 had the participation of more than 2664 professionals in 46 countries. It is, therefore, an important vehicle for the dissemination of new perspectives on strategic communication, intending to identify the current challenges and future trends of Public Relations in Europe, assuming great relevance as it allows the sharing of knowledge and best practices.

As a transactional study, developed by EUPRERA - European Public Relations Education and Research Association and the EACD - European Association of Communication Directors, this radiography covers professionals at an European level, whether Communication and Public Relations Directors of Public, Private Organizations and NGOs, such as External Consultants.

The questions are segmented into different areas/sections that include different items, which have evolved over these 15 years, depending on different research objectives that reflect concerns and trends that it was important to listen to at different moments. Even so, there is a structure that has been maintained over the years and that we have compiled this way:

- Section about the communication professional: questions about demographics, education, job and professional status, professional perception…

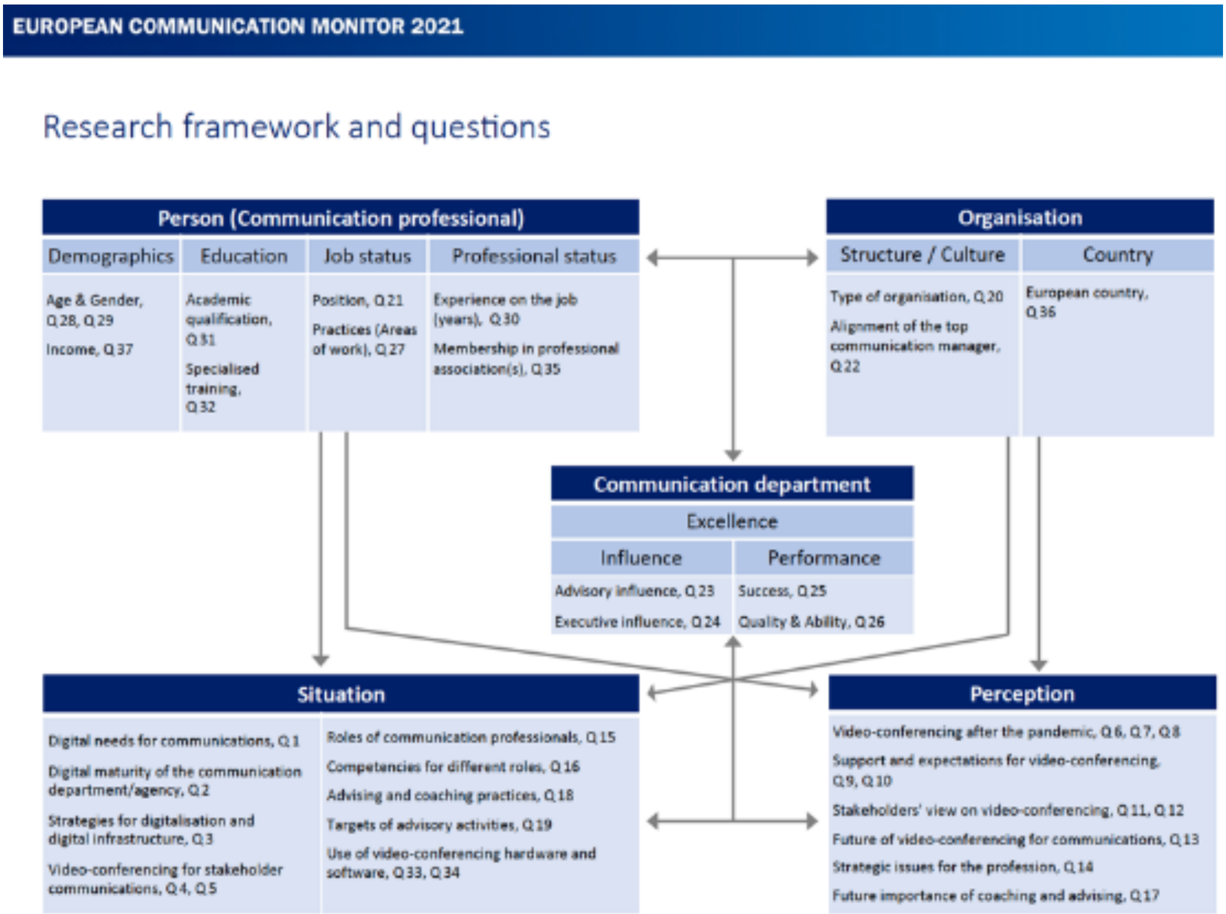
- Section about the organization: questions about structure and culture, country …

- Section about the communication department: questions about influence, performance…

- Section about specific situations | the present: questions about issues inquired these years…

- Section about the perception | the future: questions about the perception of the professionals about specific issues and their future relevance for the Public Relations and Communication field.

Figure 2. Example of the 2021 questions' design



Source: ECM (2021)

Each edition has common questions that identify the evolution of the Communication and Public Relations industry in some categories, and special issues and concerns that have been changed, over these 15 years (cf. ECM 2007-2021), as the economic recession beginning in 2008 (ECM 2010); reporting and decision making; the credibility of public relations; ROI of communication; social media governance (ECM 2011); main ethical challenges for communication professionals in the 21st century (ECM 2012); CEO reputation, crisis communication, international communication, communicating with digital natives (ECM 2013); boundaries between public relations and marketing (ECM 2015); big data and algorithms for strategic communication; and stakeholders' engagement (ECM 2016); fake news, trust, leadership, work stress and job satisfaction (ECM 2018); artificial intelligence and new content strategies (ECM 2019); cyber security and communications; gender equality in the profession and competence gaps in strategic communication (ECM 2020); and commtech and digital infrastructure, video-conferencing for stakeholder communications, future roles for communication professionals; among many other subjects.

Although Portuguese professionals were represented in previous editions, it was only in 2013 that an effort was made to increase their participation to have a relevant sample and to allow for isolated data processed about the country (Zerfass & Oliveira 2013). The ECM once again reflected data from Portugal in 2014 and 2015; with a new interregnum in 2016 and 2017; and returned in 2018, 2019, 2020, and 2021, with the collaboration of Prof. Dr. Sónia Pedro Sebastião, of the University of Lisbon.

The macro survey is applied using an online platform, sent to Public Relations and Communication professionals affiliated with national, European and global associations, supported in Portugal by APECOM (25 associated companies), APCE (Sebastião & Spínola, 2021) and SOPCOM – Portuguese Association of Communication Sciences (Zerfass & Oliveira, 2013). Personal networks are also used to broaden the respondents, looking for an intentional sample with the largest possible number of participants (Sebastião & Spínola, 2021), as there is a concern to increase total and qualified response rates.

If the ECM 2013 had 71 responses from Portuguese professionals (Zerfass & Oliveira, 2013), according to the study by Sebastião and Spínola (2021), referring to the ECM 2018 data, the

Portuguese respondents were 117, mostly from agencies (42%), which may show a greater predisposition to participate in a study that focuses on these professional structures.

Even so, it appears that few Portuguese professionals and researchers participate in the ECM and, as Zerfass and Oliveira (2013) showed, Portugal has not yet developed a study on its specific reality that could be a space for investigation, reflection, and dissemination of knowledge and benchmarking practices that characterize the Public Relations sector and its professionals.

At the same time, it was found that monitors, observatories, yearbooks, and reports periodically analyze the Communication and Public Relations sector, being, as said, a reference the ECM - European Communication Monitor; and, more recently, the LCM – Latin American Communication Monitor (promoted by Euprera), the NACM - The North American Communication Monitor (sponsored by The Plank Center); and, at a national level, in Spain, the ADECEC and DIRCOM.org Reports.

Indeed, as the profession of Public Relations, Communication Management, and Strategic Communication has been institutionalized, interest in understanding the patterns of behavior, and the similarities and differences of professional practice in the world has also increased (Moreno et al., 2010). Concerning those works, as well as investigations by other researchers on a more specific geographic or sectoral context (Matilla et al, 2014; Vázquez Gestal & Fernández-Souto, 2014); Costa- Sánchez et al., 2020; 2021), our study seeks to characterize the sector in Portugal, sharing some of the methodologies applied in these studies, as Portuguese academics and professionals have a gap in these important data gathering.

3. METHODOLOGY

Researching the Public Relations and Communication sector in Portugal, we recognized the embryonic state of institutionalization of this field of activity, with multiple designations associated with its professionals and corresponding structures in which their professional activity is framed. As Moreno et al (2012) have already shown, in relation to Spain, in Portugal there is also discredit and rejection of Public Relations, opting for the use of other terminologies, whether in in-door services or outsourcers. This constituted the first

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challenge to our study and the investigation methodology to be applied: how to study a field of action that has not been characterized, with problems of identity and affirmation, without regulation? Where are their professionals and where do they work?

Thus, Communication and Public Relations Agencies and Consultancies have become a methodological option to research this sector in Portugal, recognizing its fragmentation, lack of institutionalization, and failures in *associativism* (Gonçalves, 2012; Zerfass & Oliveira, 2013; Sebastião et al., 2014; Ruão et al., 2020; Sebastião et al., 2021), believing that these companies are a relevant sample to consider.

In the research about the emergence and institutionalization of Public Relations in Portugal, we noticed that large companies, multinationals, and public institutions had Public Relations and Communication departments and offices (Fonseca, 2011; Santos, 2016), although they vary in designation assumed and in their core and functional activities. At the same time, as a complement or alternative to this indoor service, agencies and consultancies appear (Pereira, 2012; Lopes, 2013), which, for us, they are a universe that allows us to follow the evolution of the sector in Portugal and its ability to adapt to the needs of companies that hire this service, in order to ensure Communication and Public Relations requirements, either as a complement to an internal department or as a permanent, periodic or occasional external service.

It was therefore decided to define our research universe as companies that have been registered to provide this service, which Economic Activity Code is the 70210 [Consultancy, Public Relations and Communication Activities] (INE, 2010).

In the first phase, we did not find a single directory where all the companies were identified, so we tried to perform "manually" this task, which proved to be representative of the fragmentation and ambiguity associated with the sector since the activities were carried out by some of these companies did not fit the designation assigned by their EAC.

Later, we turned to the SABI®[3] database of Bureau Van Dijk (BVD), which considers companies registered in Portugal and Spain and allows access to relevant information about

[3] SABI® - Iberian Balance Sheet Analysis System (sabi.bvdinfo.com)

companies, not only in the field of marketing research but also in academic and scientific, as is our purpose.

With this access, we define our sample:

- Portuguese companies;

- registered in EAC 70210;

- active[4].

Once the registered agencies were identified, we collected the data and analyzed them in Microsoft Excel, depending on the parameters and analysis categories that we had defined for this phase of the research, namely: number of companies and their evolution; localization of companies and geographical distribution; legal structure; main and secondary EAC; corporate and business data; employees: number, evolution, gender; active versus inactive companies; etc.

4. RESULTS AND DISCUSSION

4.1. Agencies; date of establishment; main and secondary activities; and geographic dispersion

Our research initially found 653 companies with the Economic Activity Code 70210, i.e. associated with Consultancy, Public Relations, and Communication Activities as the main activity. However, they were reduced by almost half (58%) when considering just active companies. And it was these 378 that we considered as the sample in our study.

In addition to code 70210, they have other economic activities with great disparity in associated services, as 949 companies present this service as a secondary and/or complementary activity, which we only consider in this initial framework, along with the inactive companies shown in table I.

[4] Although at a later stage of the investigation we also analyzed inactive companies between 2006 and 2020

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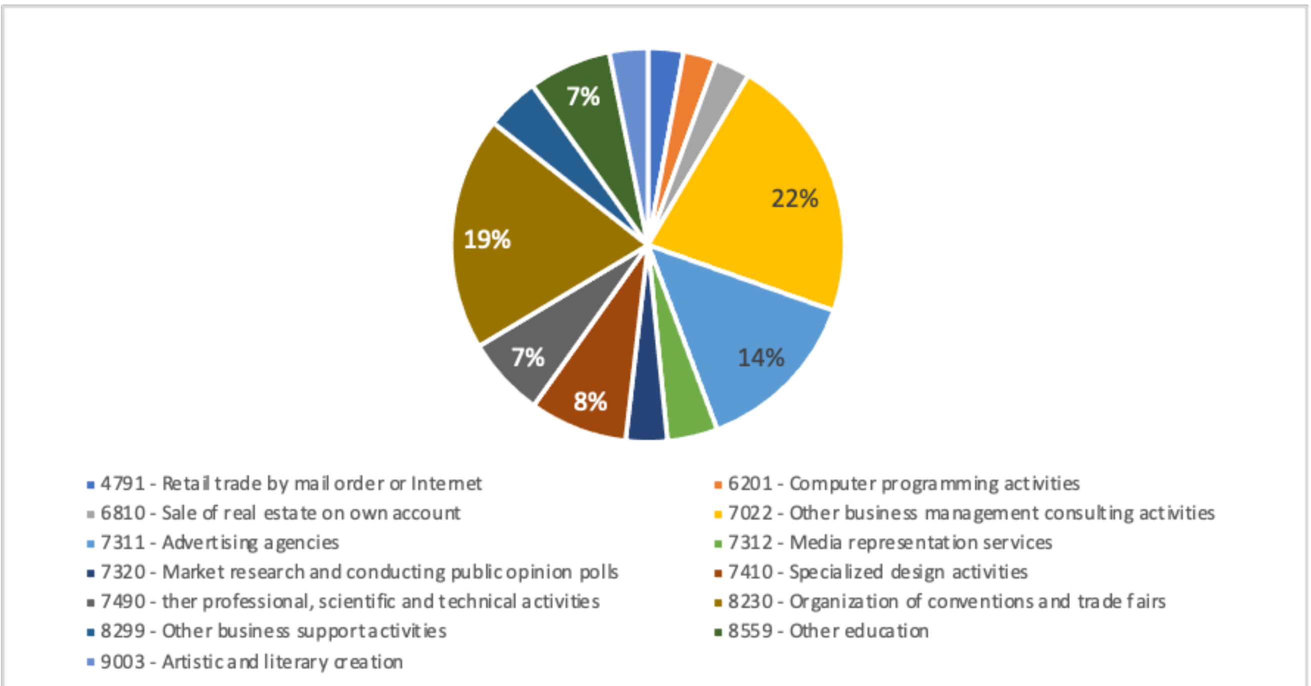
Table 1. 70210 Economic Activity Code (main / secondary | active / inactive companies)

	Active 70210 Companies	All 70210 Companies
70210 as Main Code	**378**	653
70210 as a Secondary Code	949	1380
All 70210 Code Companies	1327	2033

Source: Own author cf. SABI®

There are, therefore, 378 active companies with main EAC 70210, which simultaneously provide other services. We found a wide dispersion of services provided to the market, with 120 different secondary codes, the most relevant codes being those shown in figure 3.

Figure 3. 70210 Main Code – Other Activities



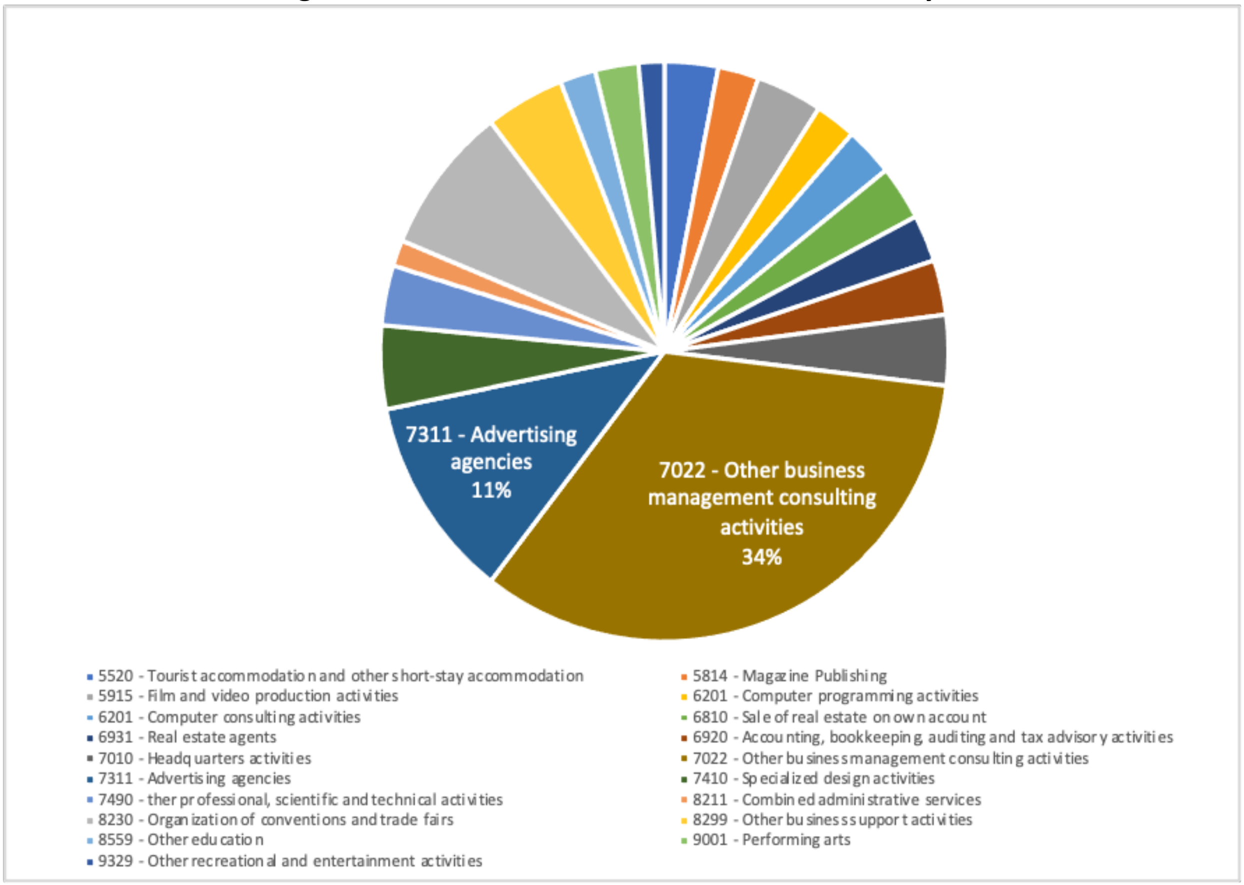
4791 - Retail trade by mail order or Internet	12
6201 - Computer programming activities	11
6810 - Sale of real estate on own account	12
7022 - Other business management consulting activities	90
7311 - Advertising agencies	57
7312 - Media representation services	17
7320 - Market research and conducting public opinion polls	14
7410 - Specialized design activities	33
7490 - Other professional, scientific and technical activities	27

8230 - Organization of conventions and trade fairs	79
8299 - Other business support activities	18
8559 - Other education	28
9003 - Artistic and literary creation	13
Other Codes / Activities	240

Source: Own author cf. SABI® (n=378 **Active** Companies with 70210 as primary / main code)

Regarding the 949 companies with alternative primary EACs and 70210 as secondary code, we found 123 different primary codes, which is why there is great dispersion, with the most relevant codes being those shown in figure 4.

Figure 4. 70210 Second Code – Main Code Activity



5520 - Tourist accommodation and other short-stay accommodation	21
5814 - Magazine Publishing	16
5915 - Film and video production activities	26
6201 - Computer programming activities	16
6201 - Computer consulting activities	19
6810 - Sale of real estate on own account	21
6931 - Real estate agents	18

6920 - Accounting, bookkeeping, auditing and tax advisory activities	21
7010 - Headquarters activities	27
7022 - Other business management consulting activities	231
7311 - Advertising agencies	78
7410 - Specialized design activities	32
7490 - Other professional, scientific and technical activities	23
8211 - Combined administrative services	10
8230 - Organization of conventions and trade fairs	57
8299 - Other business support activities	31
8559 - Other education	14
9001 - Performing arts	17
9329 - Other recreational and entertainment activities	10
Other Codes / Activities	292

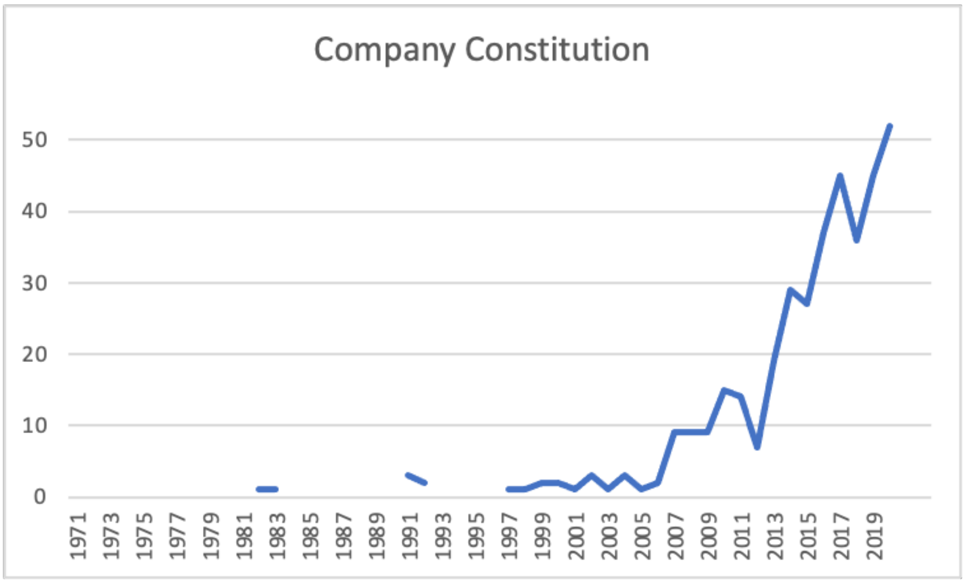
Source: Own author cf. SABI® (n=949 **Active** Companies with 70210 as secondary code)

These data show that, when registering their main and/or secondary activity, companies associate other very dispersed activities, not always related or complementary with Communication and Public Relations, eventually manifesting the versatility of this field of activity. The areas that are most common to both are 7022 - Other business management consulting activities; 7311 - Advertising agencies and 8230 - Organization of conventions and trade fairs.

Considering the active agencies (n=378), the first company was created in 1971.

As a percentage, there was a 33.3% growth in the number of new companies in 2007 and, more recently, in 2014, 26.6%. In absolute numbers, 2020 is marked by the appearance of the largest number of companies: 52; alongside, as we will see later, the number of closed or temporarily inactive companies. It is also evident that the affirmation of Public Relations has been marked in the last decade, with 82% of Communication Agencies and Consultancies constituted between 2011 and 2020.

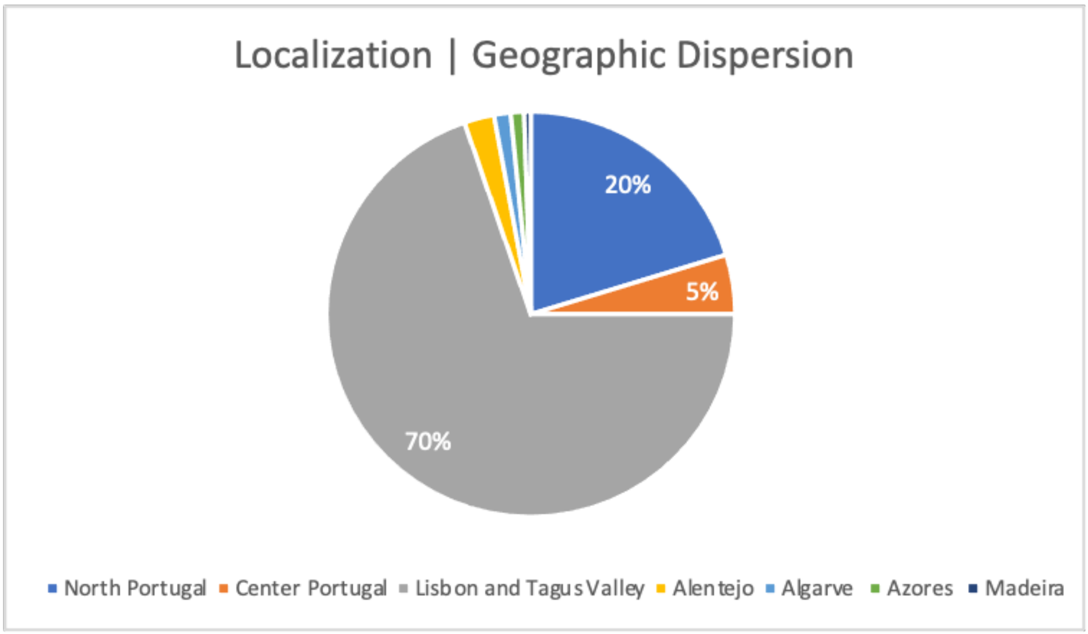
Figure 5. Date of incorporation of the company



Source: Own author cf. SABI® (n=378)

Regarding the localization of these agencies, there was a strong geographical concentration in the Lisbon and Tagus Valley region (70%), with the district of Lisbon hosting 63 % of these companies, with Oporto being 13 % and North of Portugal 20.3%.

Figure 6. Geographical Location of the Company



Source: Own author cf. SABI® (n=378)

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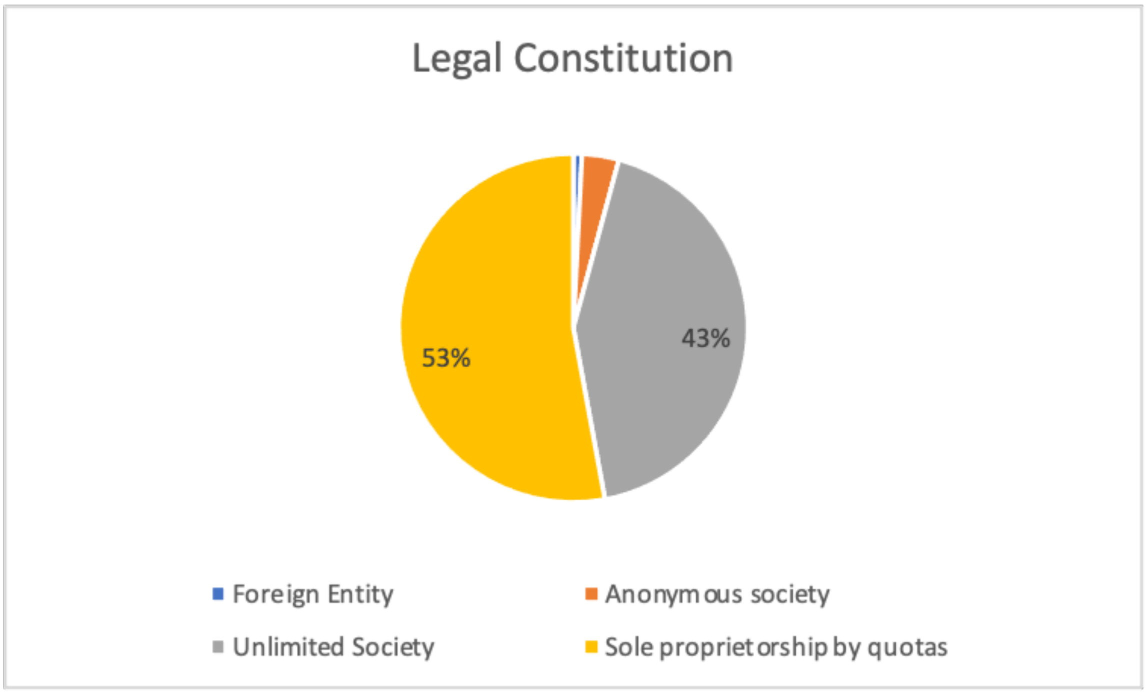
Considering that Lisbon is also where the largest companies are concentrated, we infer that some of these agencies also provide services to companies with Communication and Marketing skills in their structure, as an outsourcer, complementary, and, probably, specialized service.

4.2. Legal constitution, financial and business data

Regarding the legal nature, 53% of the companies are sole proprietorships, followed by 43% as an unlimited society. Regarding the geographic scope of action, 63% concentrate their business in Portugal.

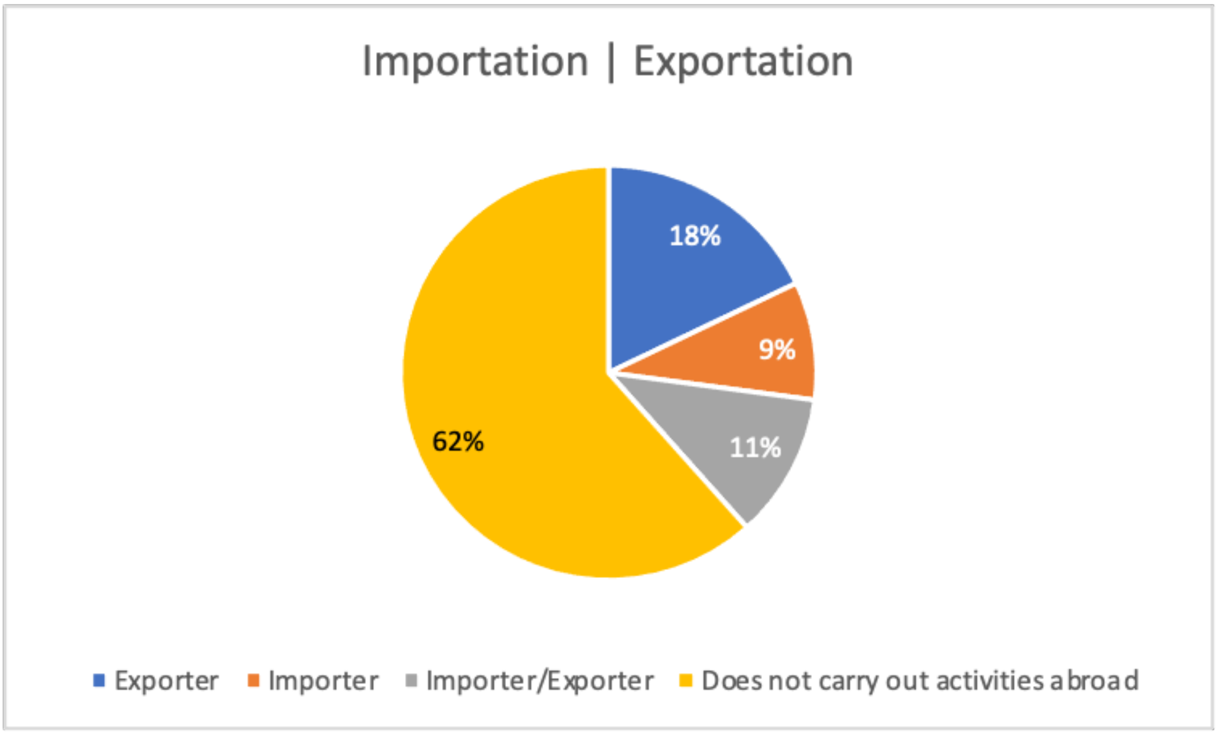
Although it needs to be confirmed, we deduce that many of these agencies are micro-companies that support SMEs and small local and regional businesses that, as they do not have departments or offices with these Public Relations and Communication competencies themselves, hire these services on an outsourcer basis, possibly more with an operational and technical purpose, than truly strategic consultancy.

Figure 7. Legal Nature of the Company



Source: Own author cf. SABI® (n=378)

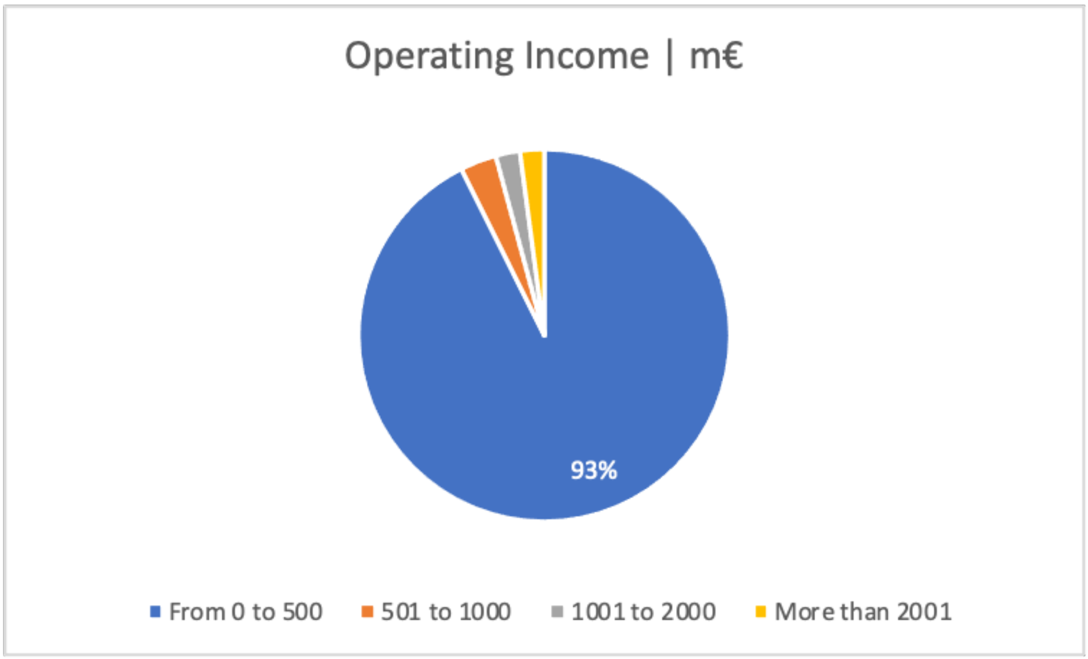
Figure 8. Internationalization of the Company's Business



Source: Own author cf. SABI® (n=378)

On average, the share capital of these companies is €20.794, being the highest value of €4.050.000.

Figure 9. Operating Income of the Companies



Source: Own author cf. SABI® (n=378)

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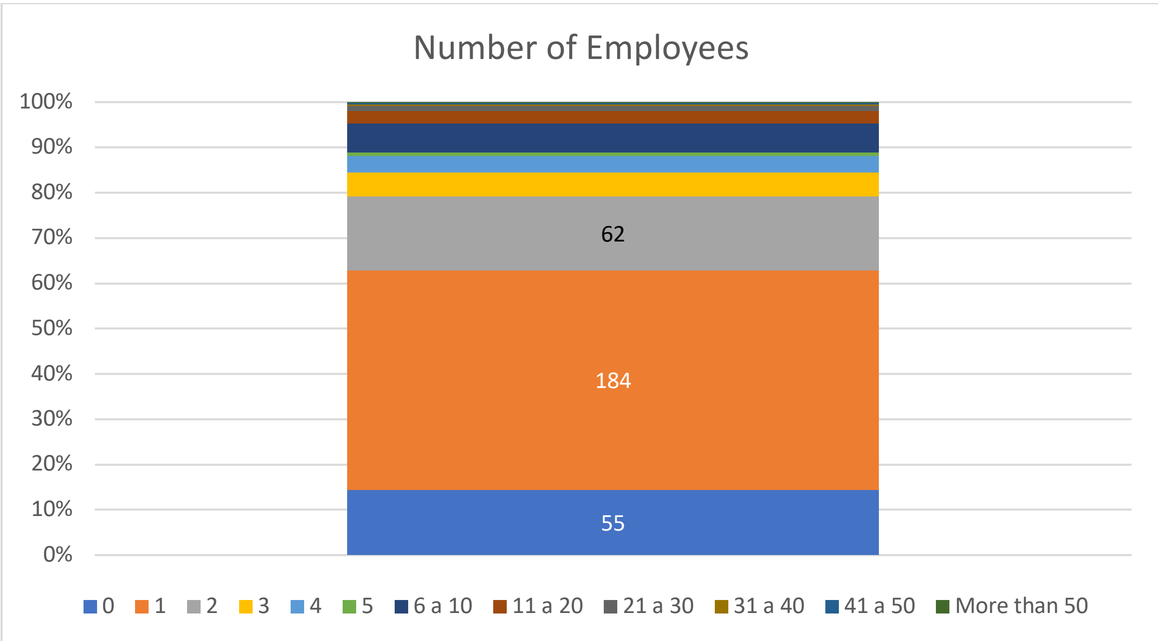
Attending to the operating income, the average value is €217.000; being that 25 did not present results or a result equal to zero, and the highest value is €7.667.000. A significant fact is that 69% of the companies have less than €100.000 of operating income and 93% less than €500.000.

4.3. Number and evolution of employees

The characterization of the profile of Communication and Public Relations professional stills very reductive with these data, but it already allows us to know some interesting data that, until now, could be the target of intuition but were not yet an outcome of empirical evidence.

These companies are, for the most part, single-person companies, with less than two employees (almost 65%), being the result of an entrepreneurial project by a professional who provides this service alone with a partner and/or a collaborator.

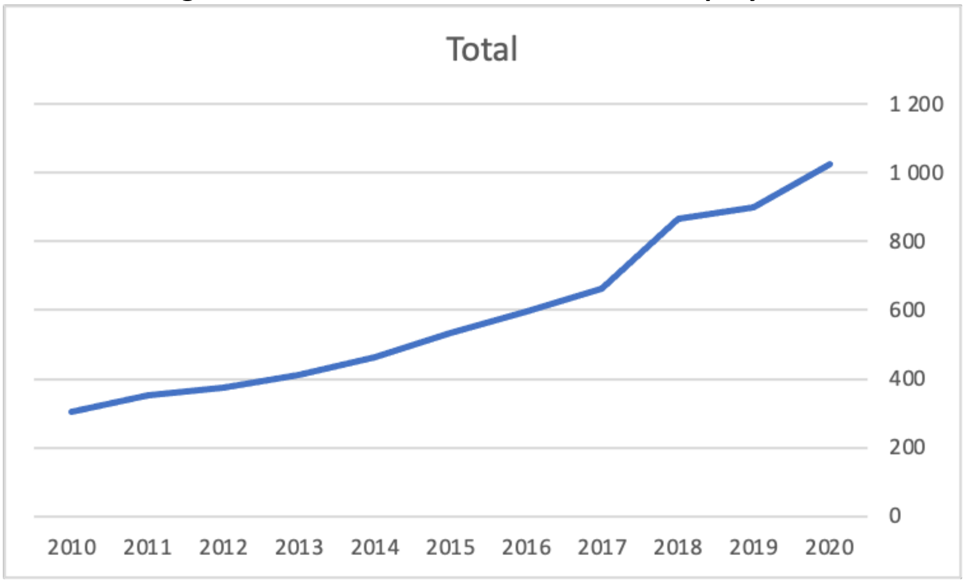
Figure 10. Number of Employees



Source: Own author cf. SABI® (n=378)

Over the last few years, there has been a constant increase in the constitution of teams at Public Relations agencies and consultancies, with 2018 being significant with 23.4% compared to the previous year.

Figure 11. Evolution of the number of Employees



Source: Own author cf. SABI® (n=378)

This growth in the absolute number of workers in this sector, from 303 in 2010 to 1025 in 2020, represents a growth of 70.4% in 11 years; also translates into the average number of workers per agency: from 0.8 professionals in 2010 to 2.7 professionals in 2020.

As already projected by the Excellence of Grunig, there is a great balance in the constitution of the team, between men (51%) and women (49%), although it is not possible to determine at this stage of the study the degree of responsibility/leadership associated with each of the sexes.

4.4. Inactivity and closure of agencies

These agencies appear and disappear from the Portuguese business landscape, unable to sustain their initial project.

Between 2006 and 2020, 15 years elapsed with the registration of inactivity of 273 agencies and consultancies with reasons such as dissolution (187), extinction (2), merger (2), liquidation (2), or temporarily inactive (79), with strong dominance in 2020.

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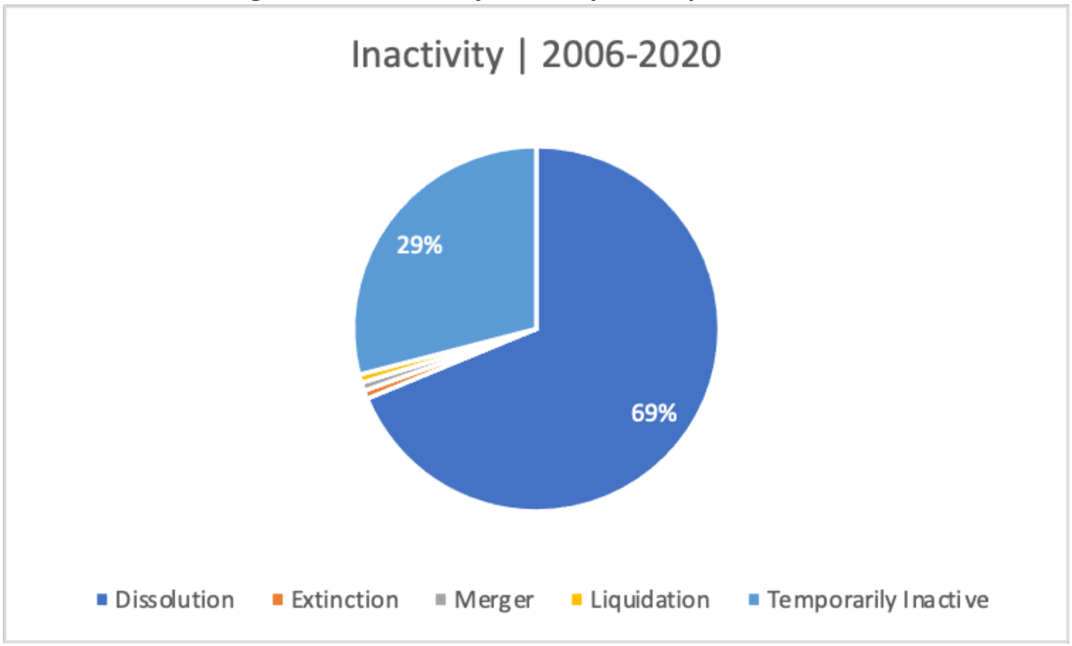
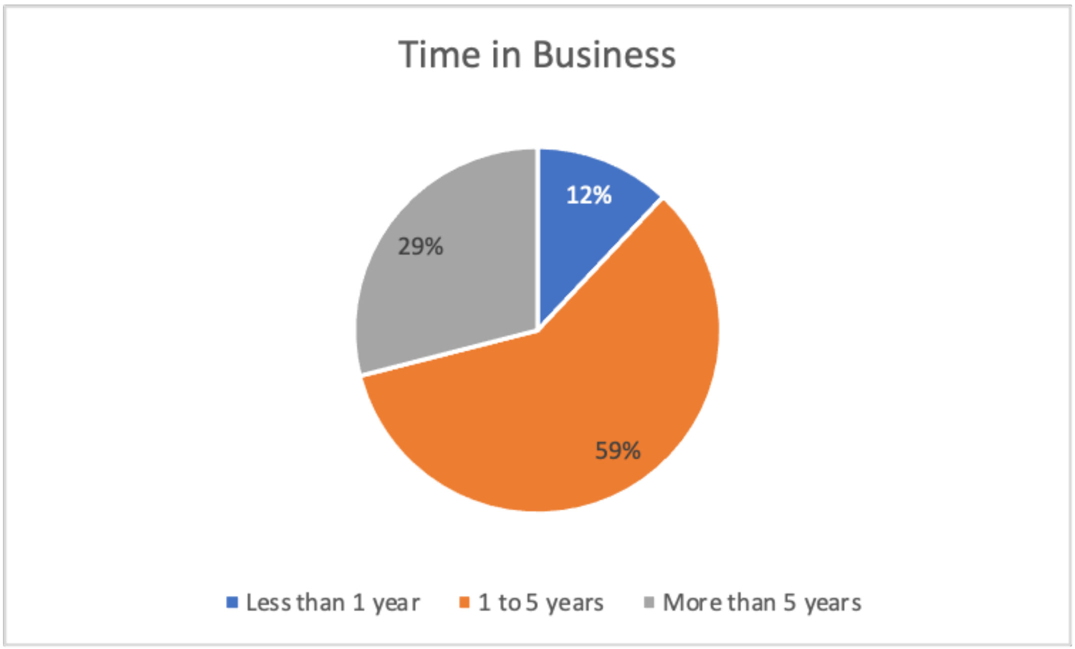
Figure 12. Inactivity of Companies | 2006-2020



Source: Own author cf. SABI® (n=273)

Lisbon represents almost half of these numbers, with 132 inactive agencies (48%) and Porto in second place with 44 (16% of the total), concentrating 64% of the country's total inactive companies between 2006 and 2020.

Figure 13. Time in Business of Inactive Companies

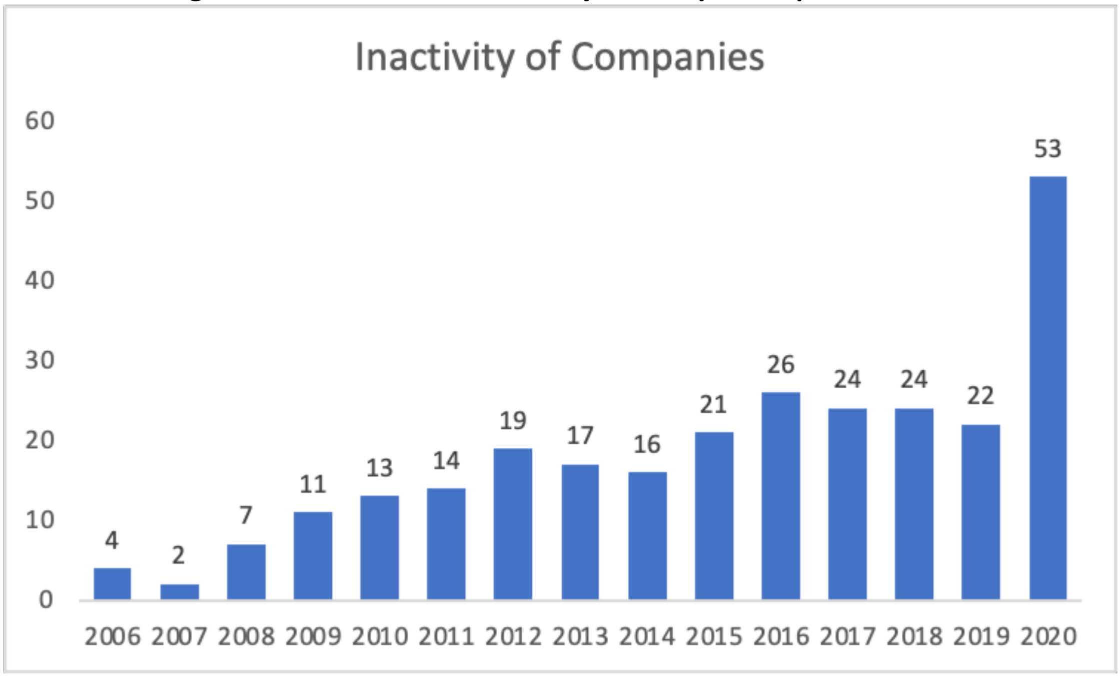


Source: Own author cf. SABI® (n=273)

If we think about the time of activity, 33 agencies (12%) closed their activity (temporarily or permanently) before completing one year of operation; 162 (59%) closed before 5 years of operation, and 78 (29%) closed after 5 years of activity.

The 2020 numbers are significant as they represent a large increase in agencies that have stopped their activity (53: 19%). The number stands out, considering that in previous years, from 2015 to 2019, the average was 24 (9%) companies closed per year, that is, less than half of the year 2020. From 2009 to 2014, the average was 15 (5%) agencies per year; and from 2006 to 2008, just over 4 (1%).

Figure 14. Evolution of Inactivity of Companies | 2006-2020



Source: Own author cf. SABI® (n=273)

Of the 53 agencies that stopped operating in 2020, 25 (47%) declared dissolution and 28 (53%) are temporarily inactive. Although it is not possible to say that the Covid-19 pandemic has a direct relationship with this movement, the atypical period of business/professional activities impacted by the health crisis may suggest this phenomenon, leaving here in this work a possibility of continuing investigations for new studies in this direction.

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6. CONCLUSIONS

Pragmatically, we assumed that this is the first step of a broader research project that is configured in an Observatory of Communication and Public Relations Agencies and Consultancies in Portugal, so we chose to make a quantitative inventory of some data that we could deduce from the SABI® database.

Even so, the results already suggest some considerations, namely the strong geographic concentration of these companies in the Lisbon and Tagus Valley region, where the country's business capital is located. In future investigations, it is necessary to understand if its services are complementary to indoor competencies and which services they are, as well as the workflow and strategic positioning between indoor and outdoor services.

Another unavoidable conclusion is the perception that a vast majority of agencies and consultancies are individual companies or micro-companies, many of them with a weak capacity to consolidate their business, which will be the target of new research aimed at this problem.

Considering this a work in progress, we have defined a later phase that involves direct contact with the agencies and their professionals, similar to the studies considered in the theoretical framework, through a sent survey to the e-mail contacts already collected and, eventually, analysis of self-presentation communication channels (i.e. websites) and/ or even focus groups.

So, as the Observatory of Communication and Public Relations Agencies and Consultancies was created, we intend to send a questionnaire that contemplates the companies, as well as their professionals, benefiting from a methodology already validated by the ECM - European Communication Monitor and that will be adjusted to these structures, with adjusted methodologies and research instruments, as happened in the study by Costa-Sánchez et al. (2020; 2021), to better understand the business profile of this industry.

In parallel with this first inventory, which was intended to be quantitative, it is essential to complement the study with a research instrument that allows the interpretation of these data to recognize best practices and critical success factors in the implementation of these companies, attending the weak sustainability of these business projects, with many agencies closing shortly after starting the activity.

New investigations should respond to this intermittence in the appearance and disappearance of these companies, with variations in the different regions of Portugal, and it is important to consider qualitative studies with those responsible for the agencies, asking about the challenges of consolidating the agencies in the current scenario and the impact of some recent social events – economic and public health – on the object of study.

As said before, we intend to continue the research, benefiting from the methodology applied by other projects and adjusting to the structure of the outsourced Communication and Public Relations services, reflecting the micro characteristics of the companies, such as services provided; employees' academic background and profile; workflow with companies/customers; influence and performance with companies/customers; main communication and business challenges; etc.

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