

EUROPEAN COMMUNICATION MONITOR 2017

HOW STRATEGIC COMMUNICATION DEALS
WITH THE CHALLENGES OF VISUALISATION,
SOCIAL BOTS AND HYPERMODERNITY
RESULTS OF A SURVEY IN 50 COUNTRIES

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HOW STRATEGIC COMMUNICATION DEALS WITH THE CHALLENGES OF VISUALISATION,
SOCIAL BOTS AND HYPERMODERNITY. RESULTS OF A SURVEY IN 50 COUNTRIES.

Ansgar Zerfass, Ángeles Moreno, Ralph Tench, Dejan Verčič & Piet Verhoeven

A study conducted by the European Public Relations Education and Research Association (EUPRERA) and the European Association of Communication Directors (EACD) supported by partner PRIME Research and media partner Communication Director magazine

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This report (chart version) is available as a free PDF document at www.communicationmonitor.eu

The report is also available as a booklet published by Quadriga Media Berlin, ISBN 978-3-942263-47-4.

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Foreword



This year, the European Communication Monitor embarks on its second decade with the proud support of the European Association of Communication Directors (EACD).

According to the 2017 Monitor, the risks and opportunities of digital and the social web are as pressing as ever: across Europe, social media and social networks are considered by far the most important channel to address stakeholders, gatekeepers and audiences. Indeed, coping with the digital evolution and the social web has been voted as the single most important issue for communication management over the next three years.

As always, the European Communication Monitor serves a necessary function by detecting areas of weakness that need to be developed: although social bots and algorithms have received plenty of media coverage in the wake of fake news stories, just a third of communications professionals follow the debate about social bots and 15.9% have no idea about the topic at all. And while an overwhelming 94.4% of European communication professionals believe that visual communications will gain in importance for organisations, only one out of 10 communicators rate themselves as highly skilled in visual communications. Plenty of opportunity, then, to improve our professional offering and learn new skills.

But what merges most of all from this year's Monitor is the recognition of the important operational and strategic contribution that communications makes to an organisation's success, with more than 70% approval rates, with the communications function emerging as a key supporter for daily management and the operations of other departments. However, top management are not aware of the full range of contributions that communications can deliver. More efforts are necessary to close this expectation gap.

At the European Association of Communication Directors (EACD) we are determined to close this gap, and we offer communication professionals a platform to connect, deepen their expertise and share best practices. Together with our members across Europe we build a network that aims to resolve collective challenges.

I invite you to explore the findings of this year's European Communication Monitor in detail on the following pages.

Dr. Herbert Heitmann

President, European Association of Communication Directors (EACD)

Introduction



During the last 12 months we have experienced significant events on the world geo-political stage with impact and implications for strategic communication. While the European Communication Monitor continues to track the specifics of the communicator's role we are also interested in mapping and monitoring the influence of wider societal issues, from economic and cultural developments to technological change, and understand their implications on practice.

The 2017 edition of our study is based on a record number of 3,387 communication professionals from 50 participating countries. It provides additional detailed analysis and insight for 20 countries. The increased response rate has fortified the position of the ECM as the largest and most comprehensive study of its kind worldwide.

We have asked practitioners about the role and influence of visualisation in strategic communication. We live in an increasingly visual society, so what are communicators and their organisations doing in response to this change? Picking up on other emerging trends we have explored the growing importance of social robots – social bots. We also explore the increasing culture of hyper consumption and the evolution of a hypermodern society.

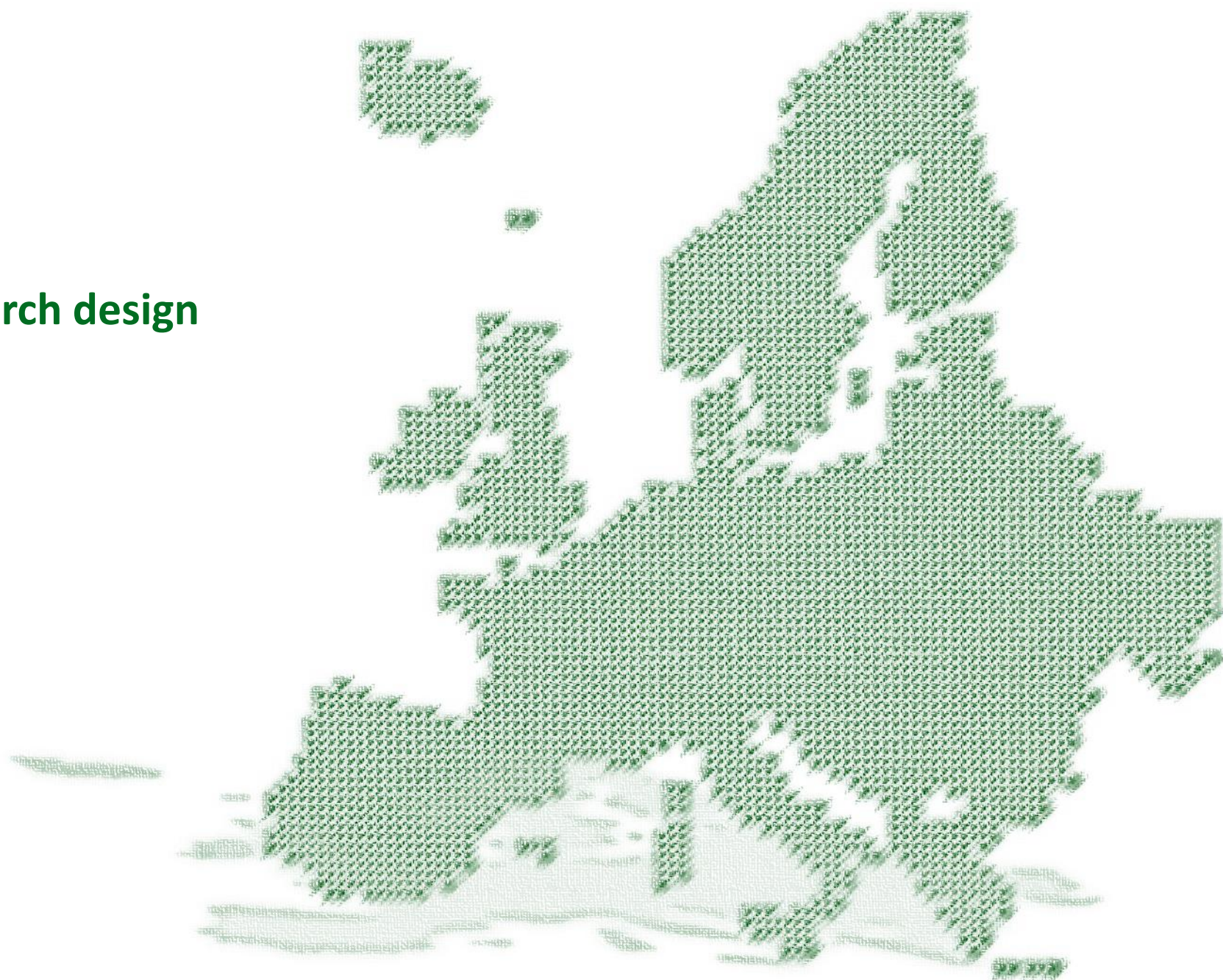
Other important areas within this year's scope are on-going debates about quality management, how communicators do or don't benchmark their work, and the contribution of communication departments to organisational success. These topics are closely linked to the debate about high performing communications, something captured in our just published book, *Communication Excellence: How to Develop Manage and Lead Exceptional Communications* (see page 134).

On behalf of the research team, I would like to thank all professionals who spent some of their valuable time participating in the survey. The support by our national partners from renowned universities and professional associations across Europe, assistant researchers Markus Wiesenberger and Ronny Fechner as well as the EACD team is much appreciated. We would not have been able to run this study without the substantial support from PRIME Research – many thanks to Thomas Leitner and Dr. Rainer Mathes.

Prof. Dr. Ansgar Zerfass

Lead researcher; Professor and Chair in Strategic Communication, University of Leipzig, Germany & European Public Relations Education and Research Association (EUPRERA)

Research design



Research design

The European Communication Monitor (ECM) 2017 is the 11th edition of a survey that has been conducted annually since 2007. A joint study by academia and practice, the ECM is organised by the European Public Relations Education and Research Association (EUPRERA) and the European Association of Communication Directors (EACD), supported by partner PRIME Research, a global leader for media insights, and media partner Communication Director magazine. The communication monitor series is known as the most comprehensive research in the field worldwide covering more than 80 countries – the European survey is complemented by bi-annual surveys in other regions like Asia-Pacific and Latin America (Macnamara et al., 2015; Moreno et al., 2015, 2017). The study series has been initiated and is led by Ansgar Zerfass and co-authored by Ángeles Moreno, Ralph Tench, Dejan Verčič and Piet Verhoeven – all of them are renowned university professors representing different country contexts. A wider board of professors and national research collaborators ensure that the survey reflects the diversity of the field across Europe.

The ECM 2017 explores current practices and future developments of strategic communication in companies, non-profits and other organisations including communication agencies. It is based on responses from 3,387 communication professionals based in 50 European countries. They have answered a comprehensive questionnaire which collects a large number of independent and dependent variables: personal characteristics of communication professionals (demographics, education, job status, experience); features of the organisation (structure, culture, country); attributes of the communication department; the current situation regarding the professional and his/her organisation, as well as perceptions on developments in the field. The questions and the research framework have been derived from previous empirical studies and literature.

The study explores four constructs. Firstly, developments and dynamics in the field of strategic communication (Hallahan et al., 2007; Holtzhausen & Zerfass, 2015) are identified by longitudinal comparisons of strategic issues and communication channels. To this end, questions from previous ECM surveys (Zerfass et al., 2016, 2015, 2014, 2013, 2012, 2011, 2010, 2009, 2008, 2007) have been repeated. Secondly, regional and national differences are revealed by breaking down the results of this study to twenty key countries.

Thirdly, a selection of current challenges in the field are empirically tested. The ECM 2017 explores the relevance, understanding and implementation of visualisation in strategic communication (Machin, 2014; Müller, 2007), the emerging importance of social bots and challenges for strategic communication (Ferrara et al., 2016; Shorey & Howard, 2016), discussions about the concept of hypermodernity and its consequences for communications (Lipovetsky, 2005; Tench et al., 2017), on-going debates about quality management and how communicators do or don't benchmark (Bogetoft, 2012) their work internally and externally, the contribution of communication departments to organisational success (Volk et al., 2017; Zerfass & Volk, 2017), as well as the annual review of salaries and pay trends for communicators across Europe.

Moreover the study extends the debate about excellent communication departments (Tench et al., 2017; Verčič & Zerfass, 2016) by identifying characteristics of high performing communication departments in the sample. Overall, the research design supports a broad range of evaluations and interpretations which expand the body of knowledge.

Methodology and
demographics



Methology and demographics

The online questionnaire used for the European Communication Monitor 2017 consisted of 31 questions. Six of these questions were only presented to professionals working in communication departments. Instruments used dichotomous, nominal and ordinal response scales. They were based on research questions and hypotheses derived from previous research and literature. The survey used the English language and was pre-tested with 46 communication professionals in 20 European countries. Amendments were made where appropriate and the final questionnaire was activated for five weeks in March/April 2017. More than 30,000 professionals throughout Europe were invited with personal e-mails based on a database provided by the European Association of Communication Directors (EACD). Additional invitations were sent via national research collaborators and professional associations.

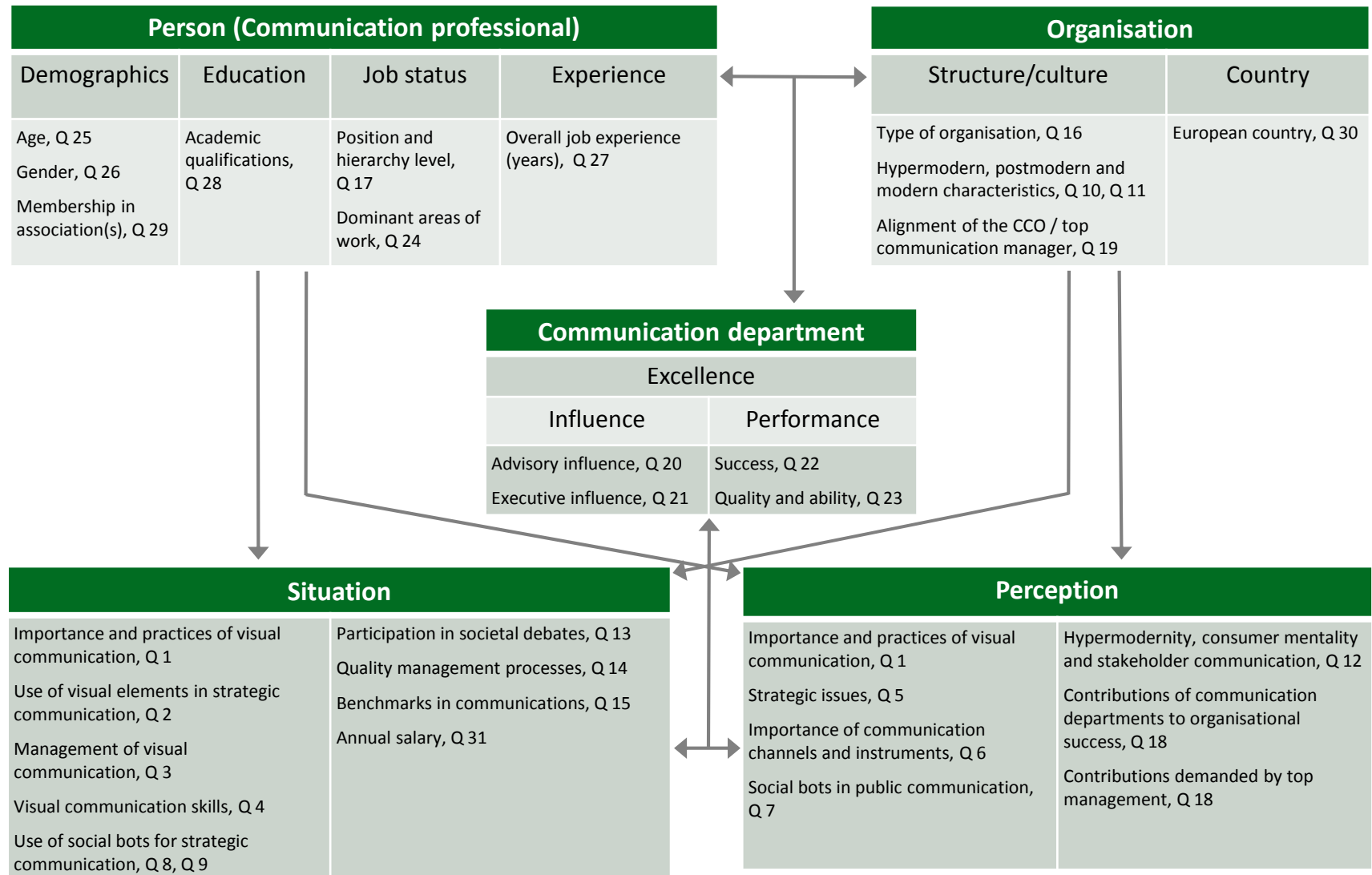
In total 9,895 respondents started the survey and 3,496 of them completed it. Answers from participants who could not clearly be identified as part of the population were deleted from the dataset. This strict selection of respondents is a distinct feature of the ECM and sets it apart from many studies which are based on snowball sampling or which include students, academics and people outside of the focused profession or region. The evaluation is then based on 3,387 fully completed replies by communication professionals in Europe.

The Statistical Package for the Social Sciences (SPSS) was used for data analysis. Cluster analyses were used for classifying subjects. Results have been tested for statistical significance with, depending on the variable, Chi², Pearson Correlation, ANOVA/Scheffe Post-hoc, Kendall rank independent samples T, and Kendall rank correlation tests. Statistical indicators (Cramer's V, F, r, Tau) are reported in the footnotes. Significant results are mentioned in the footnotes or marked with * ($p \leq 0.05$, significant) or ** ($p \leq 0.01$, highly significant) in the graphics or tables.

The demographics reveal the high quality of the sample, which is dominated by senior professionals with a sound qualification and a long tenure in the field. Seven out of ten respondents are communication leaders: 37.0 per cent hold a top hierarchical position as head of communication or as CEO of a communication consultancy; 30.4 per cent are unit leaders or in charge of a single communication discipline in an organisation. 63.6 per cent of the professionals interviewed have more than ten years of experience in communication management. 59.6 per cent of the total sample are female and the average age is 41.8 years. A vast majority (94.5 per cent) in the sample has an academic degree, and more than two thirds hold a graduate degree or even a doctorate. Three out of four respondents work in communication departments in organisations (joint stock companies, 22.4 per cent; private companies, 22.6 per cent; government-owned, public sector, political organisations, 15.8 per cent; non-profit organisations, associations, 13.2 per cent), while 26.1 per cent are communication consultants working freelance or for agencies.

The 2017 ECM edition achieved the widest possible spread of countries in Europe with participants from all 50 countries and geographic regions identified in the official list of European Countries by the European Union (2017) and the Columbia Encyclopedia (2017). Detailed insights were calculated for 20 key countries. Most respondents (31.5 per cent) are based in Western Europe (countries like Germany, Belgium, Switzerland, Netherlands, France), followed by Northern Europe (28.8 per cent; countries like United Kingdom, Finland, Sweden), Southern Europe (23.8 per cent; countries like Italy, Spain, Slovenia) and Eastern Europe (15.9 per cent; countries like Romania, Czech Republic, Poland).

Research framework and questions



Demographic background of participants

Position

Head of communication, agency CEO	37.0%
Responsible for single communication discipline, unit leader	30.4%
Team member, consultant	26.5%
Other	6.1%

Organisation

Communication department		
▪ joint stock company	22.4%	} 73,9%
▪ private company	22.6%	
▪ government-owned, public sector, political organisation	15.8%	
▪ non-profit organisation, association	13.2%	
Communication consultancy, PR agency, freelance consultant		26.1%

Job experience

More than 10 years	63.6%
6 to 10 years	20.2%
Up to 5 years	16.1%

Alignment of the communication function

Strongly aligned communication department	26.6%
Aligned communication department	58.3%
Weakly aligned communication department	15.1%

Personal background of respondents

Gender / Age

	Overall	Head of communication, Agency CEO	Team leader, Unit leader	Team member, Consultant
Female	59.6%	50.6%	59.2%	70.2%
Male	40.4%	49.4%	40.8%	29.8%
Age (on average)	41.8 yrs	45.7 yrs	40.9 yrs	37.5 yrs

Membership in a professional association

European Association of Communication Directors (EACD)	10.5%
Other international communication association	12.0%
National PR or communication association	45.1%

*Highest academic educational qualification **

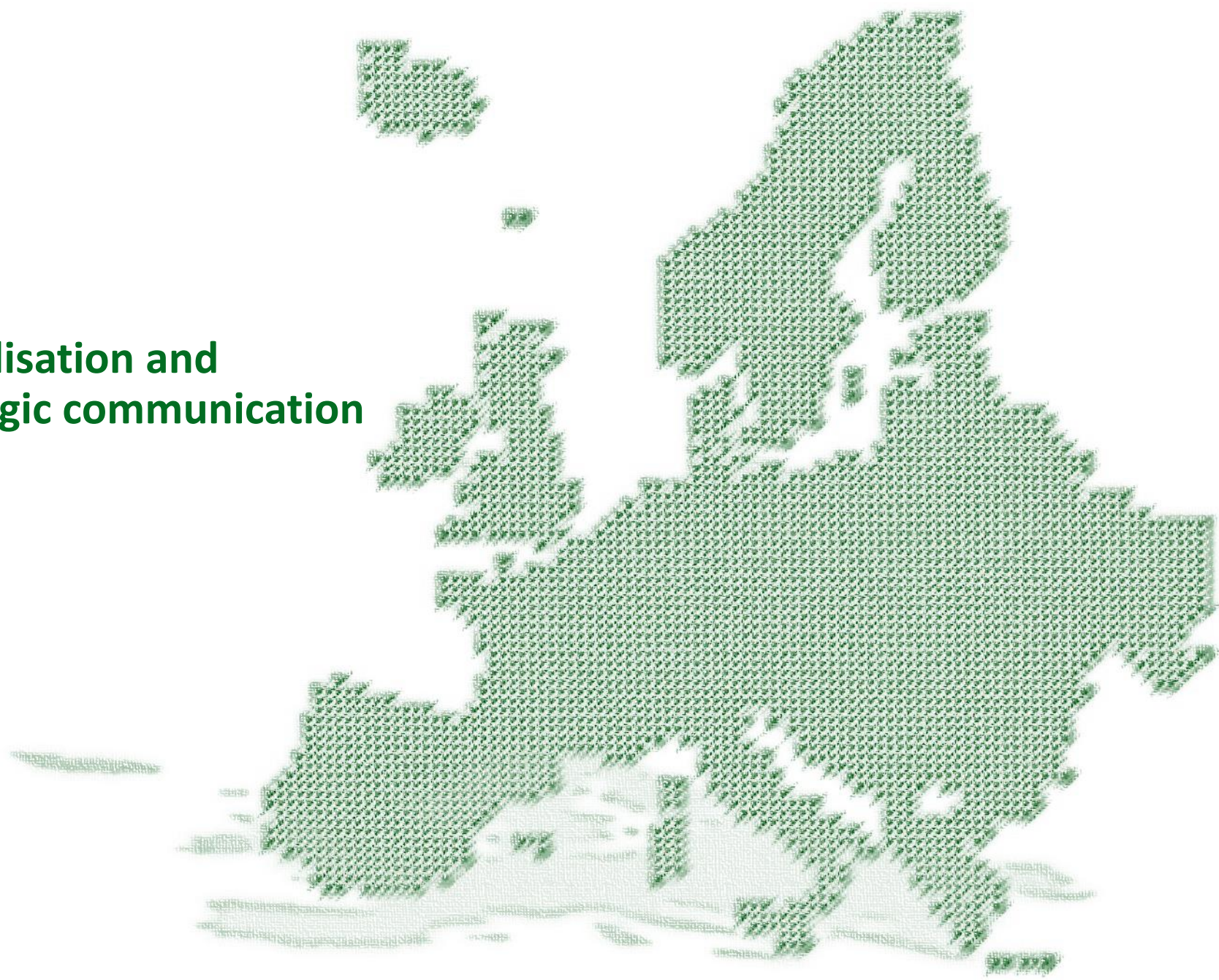
Doctorate (Ph.D., Dr.)	5.6%
Master (M.A., M.Sc., Mag., M.B.A.), Diploma	62.4%
Bachelor (B.A., B.Sc.)	26.5%

Countries and regions represented in the study

Respondents are based in 50 European countries and four regions

Western Europe 31.5% (n = 1,066)	Northern Europe 28.8% (n = 976)	Southern Europe 23.8% (n = 805)	Eastern Europe 15.9% (n = 540)
Germany Belgium Switzerland Netherlands France Austria Luxembourg Liechtenstein Monaco	United Kingdom Finland Sweden Ireland Norway Denmark Latvia Lithuania Estonia Iceland	Italy Spain Slovenia Croatia Serbia Turkey Portugal Greece Macedonia Malta Bosnia and Herzegovina Cyprus Albania Montenegro Vatican City Andorra Kosovo San Marino	Romania Czech Republic Poland Ukraine Russia Bulgaria Hungary Slovakia Armenia Georgia Moldova Azerbaijan Belarus

Visualisation and
strategic communication



Chapter overview

Strategic communication has always involved a range of media platforms and visualisation has frequently been at the centre of message transfer. As technology continues to evolve visual support for communication messaging has increased and diversified. The rapid growth of social networks such as Facebook, YouTube and Instagram has inevitably created an increase in the use and application of visual stimuli in these formats (Becker, 2004; Fahmy et al., 2014; Jenkins, 2006). Hence, Machin (2014) argues that we live in a “visual society” that includes an array of artefacts and communicative activities in visual communication. Mostly scholars of visual communication focus on the creation, presentation, and support of media works and visual messages as well as effects of audiences, but also the meaning of visuals in the contemporary society (Müller, 2007). The relevance for strategic communication was pointed out only recently (Goransson & Fagerholm, 2016), but empirical insights are still missing.

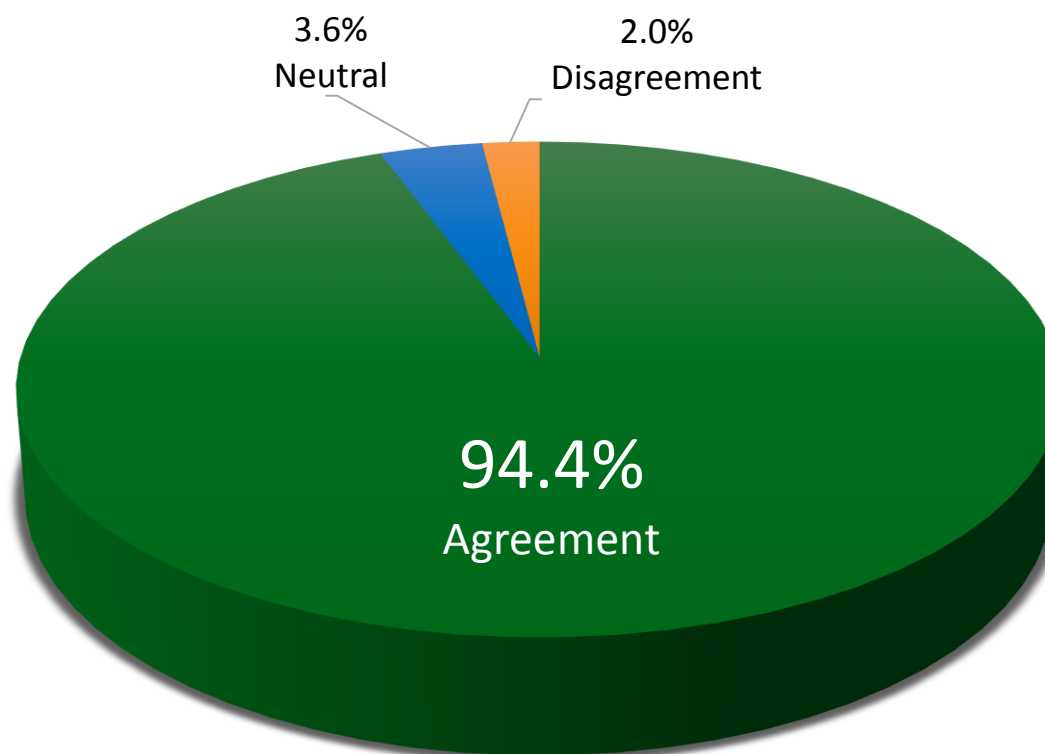
Contributing to these debates the 2017 ECM reaffirms the trend towards visual communication. 94.4 per cent of the respondents believe that visual communication will grow in importance for European organisations. Along this line seven out of ten organisations report a rising demand for visual communication by their stakeholders. To map this demand from stakeholders many organisations are directly responding with more activity that incorporates visual communication. 86.0 per cent of the organisation in the sample use more visual communication in their messaging compared to three years ago.

So we are witnessing a discernible pattern of growth in the field of visual communication which raises the question: are practitioners equipped with the right skills and competencies to deal with the changing demand? The practitioners in the 2017 ECM survey appear to recognise that visual communication requires specific competencies. That said every second professional admitted to have limited competencies in visual communication (53.3 per cent with low overall visual communication skills, based on ten items explored). For in-house departments in private companies and non-profit organisations the better news is that visual communication skills are more prevalent. Surprisingly, however, the agency sector is less well developed with 55.7 per cent reporting low visual communication skill levels. In terms of trends for different groupings there are some perhaps more predictable facts. Namely those working in online and marketing communications are more competent than their media relations peers; and younger professionals are more skilled than older colleagues.

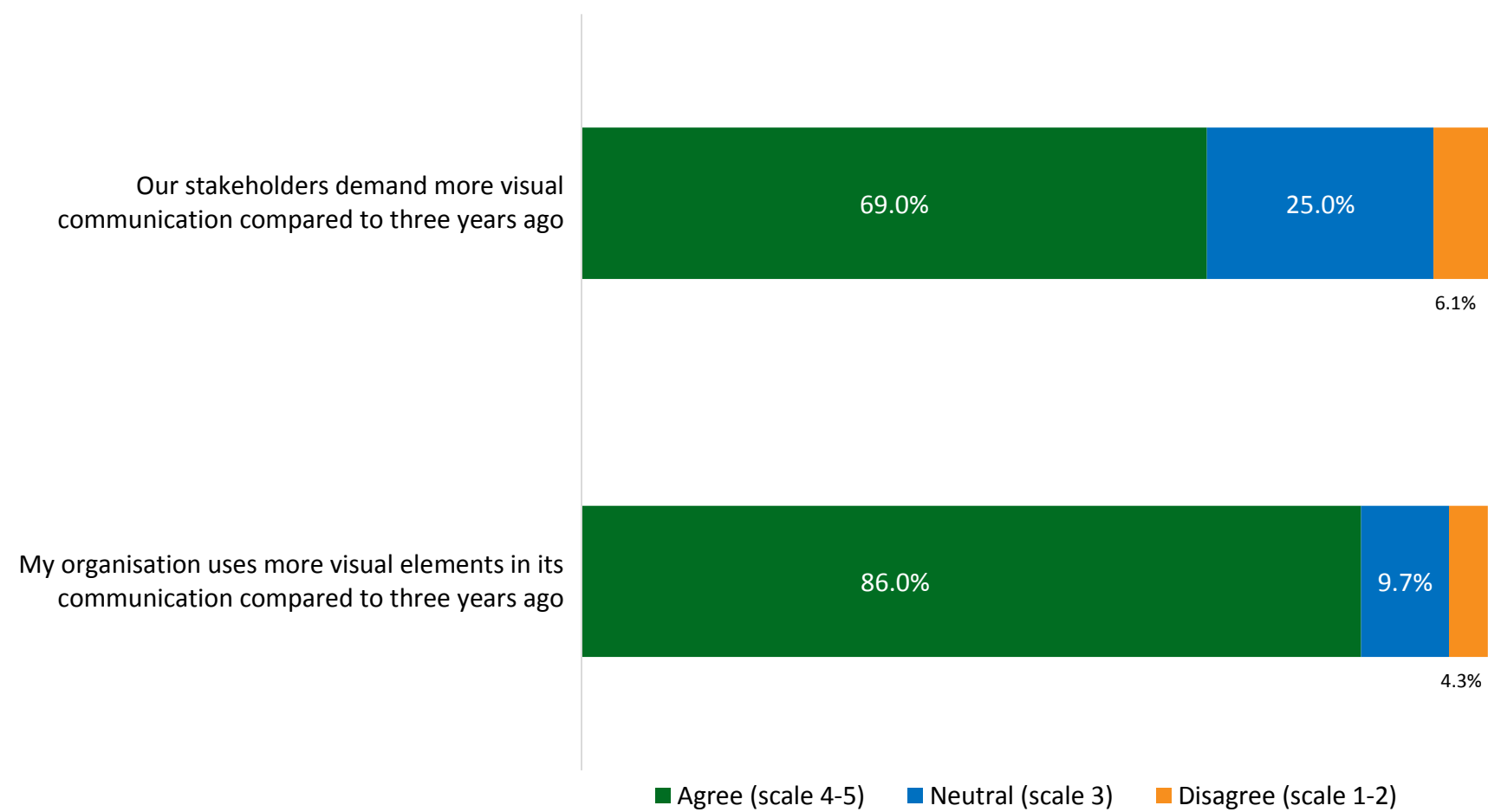
Some of the areas of growth in visual communication – when compared with three years ago – are online videos (e.g., web clips); infographics (e.g., explanatory content); instant photos (spontaneous, unedited); and business graphics (such as tables, figures). But there is a lack of clarity or agreement on how to manage these activities. Traditional corporate design guidelines (implemented in 80.1 per cent of the organisations) as well as routines for retrieving visual support from agencies and freelancers (72.3 per cent) are quite common. However only a minority has established routines for cost allocation, quality assessment and similar business processes. Alarming not more than 17.0 per cent of the organisations have implemented measurement routines for visual communication – which are necessary to identify needs and evaluate the success of communication activities. Generally, joint-stock companies are ahead of all other organisations in terms of dedicated management structures. Additional qualitative research will be necessary to identify best practices as well as obstacles in this field of strategic communication.

Visual communication will clearly gain in importance for European organisations

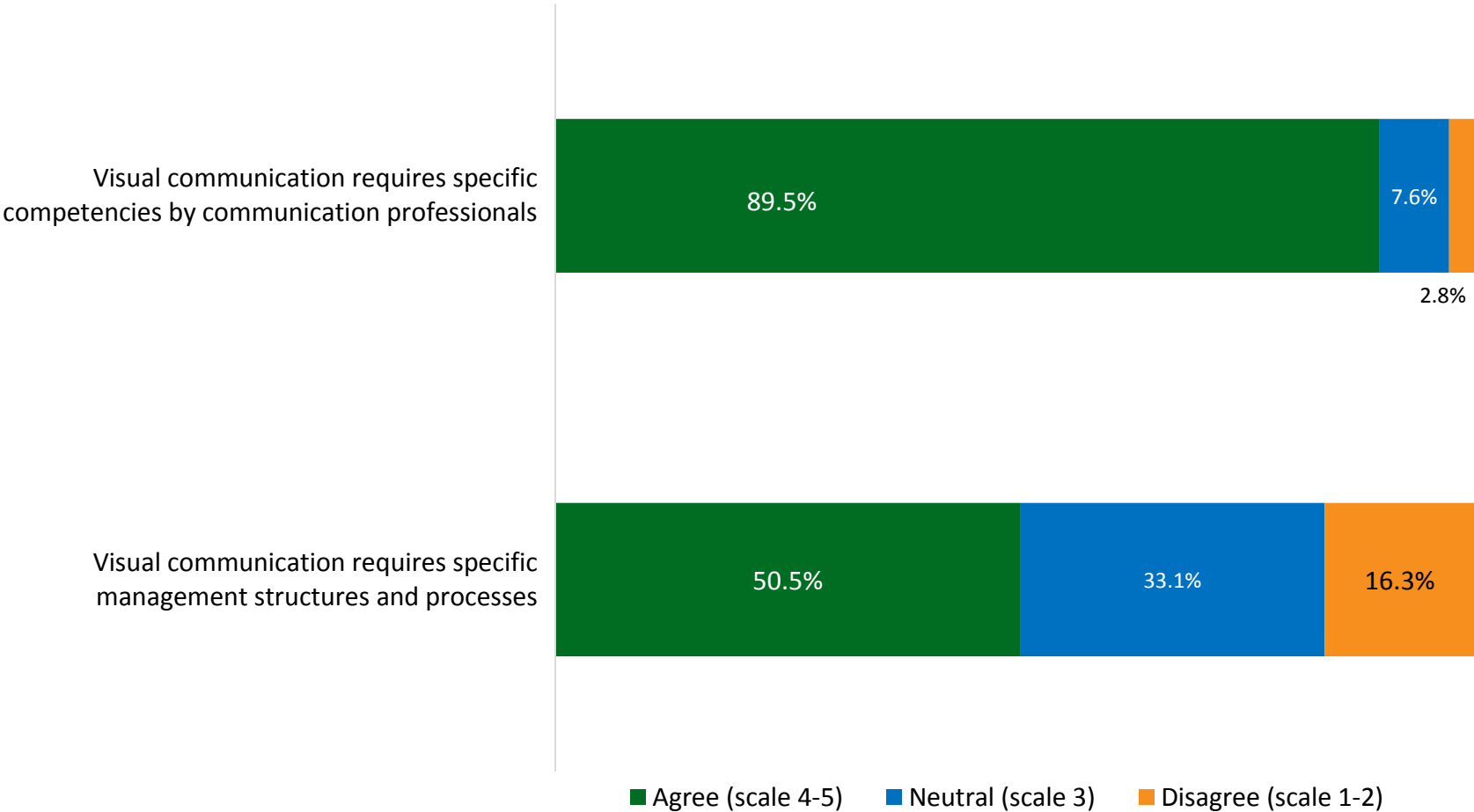
Visual elements will be more important for strategic communication in the future



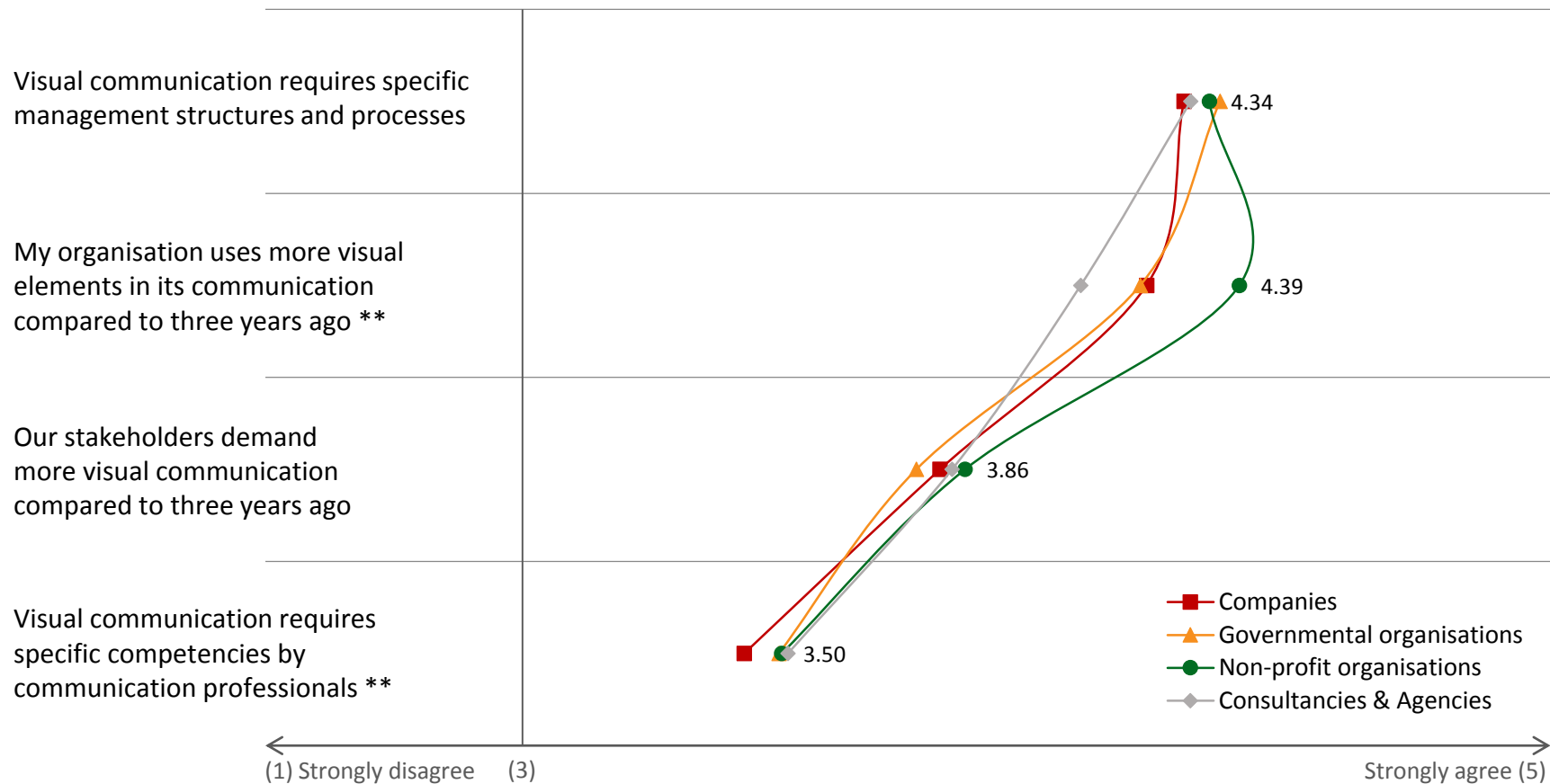
Seven out of ten organisations report a rising demand for visual communication by stakeholders, and even more have expanded their own activities in the field



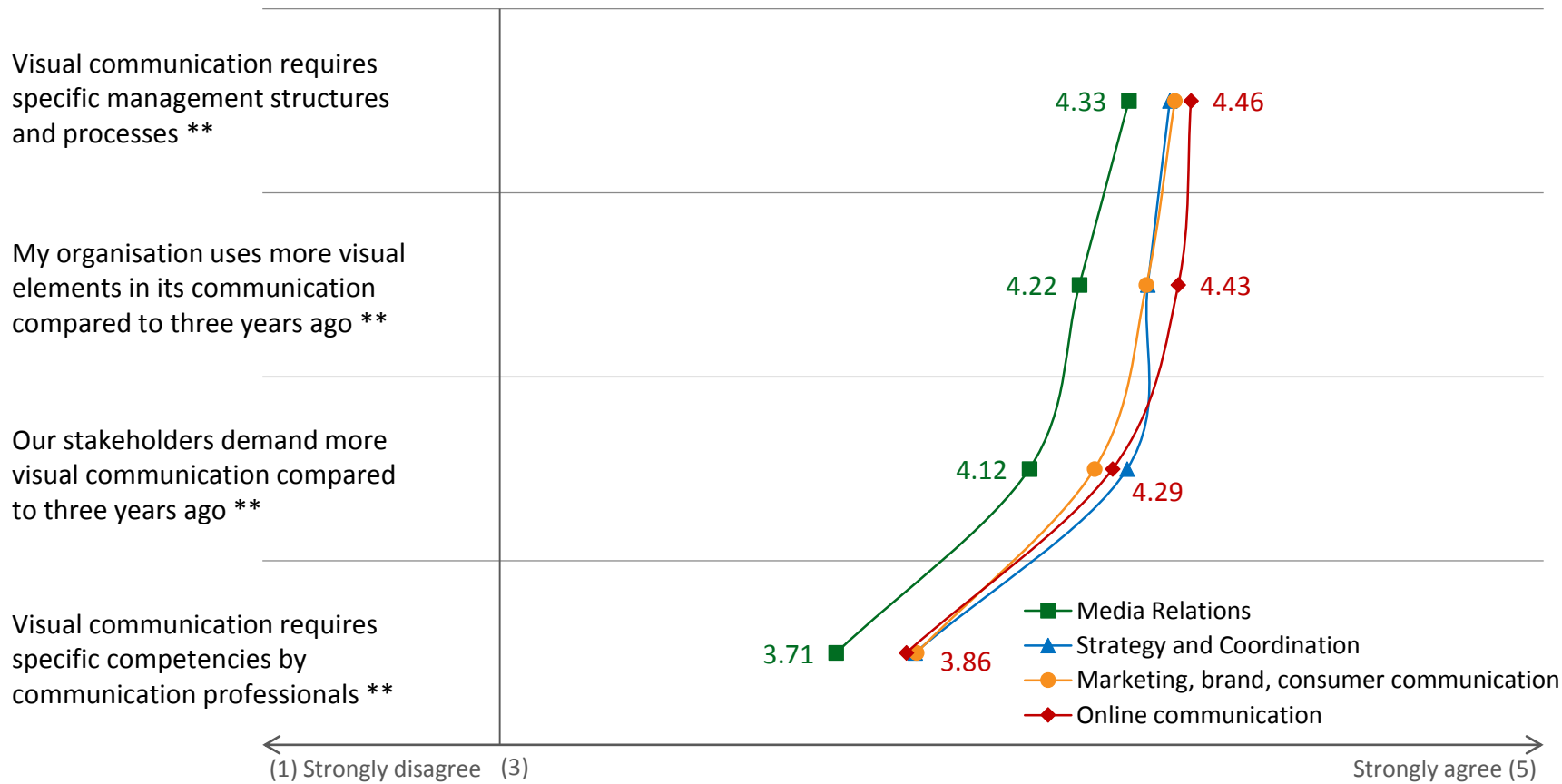
Visual communication clearly forces professionals to acquire new competencies;
but there is no agreement on the need for new management routines



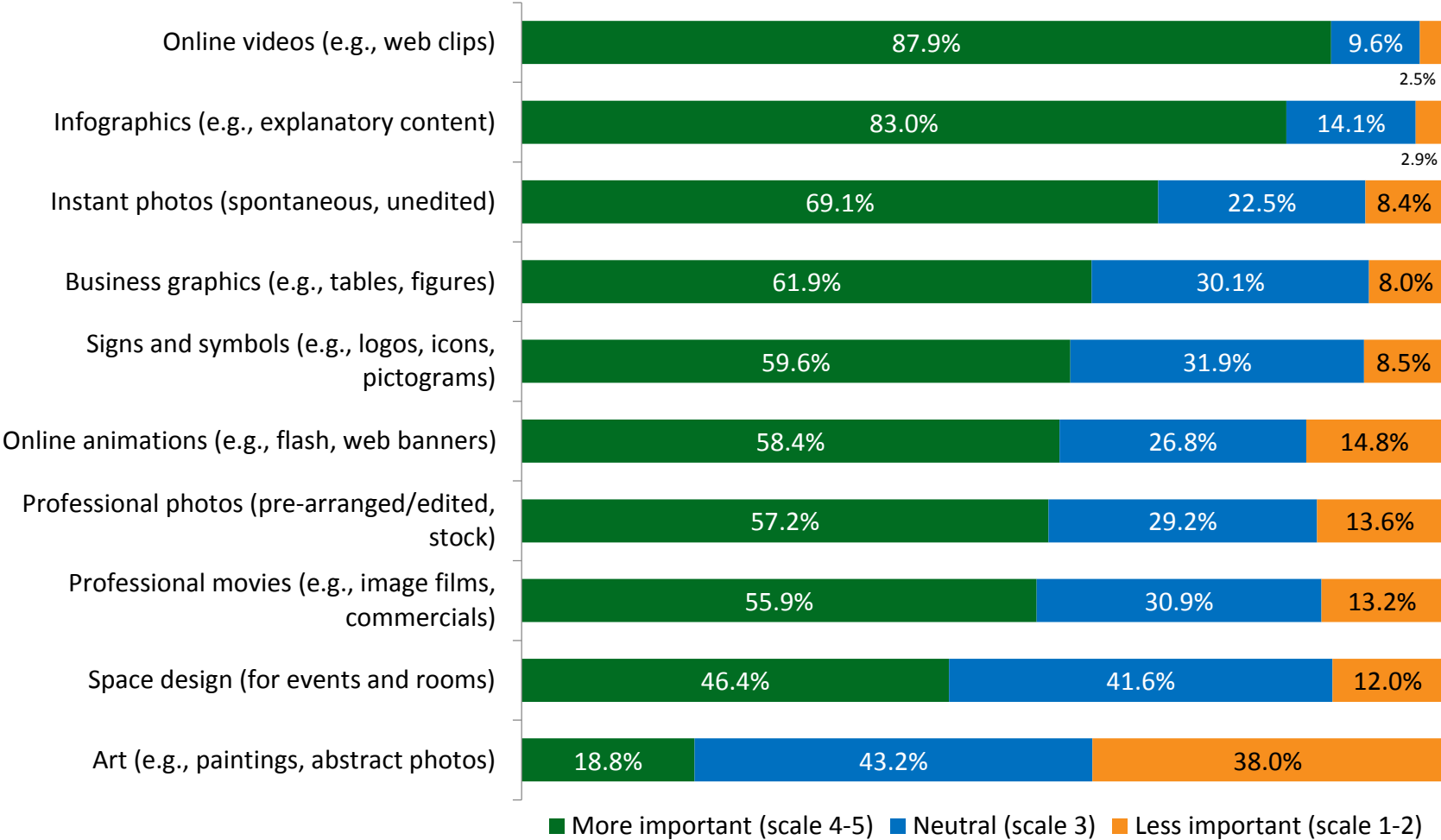
Non-profits have raised their engagement with visual communication more than the rest; companies are less convinced of the need for new competencies



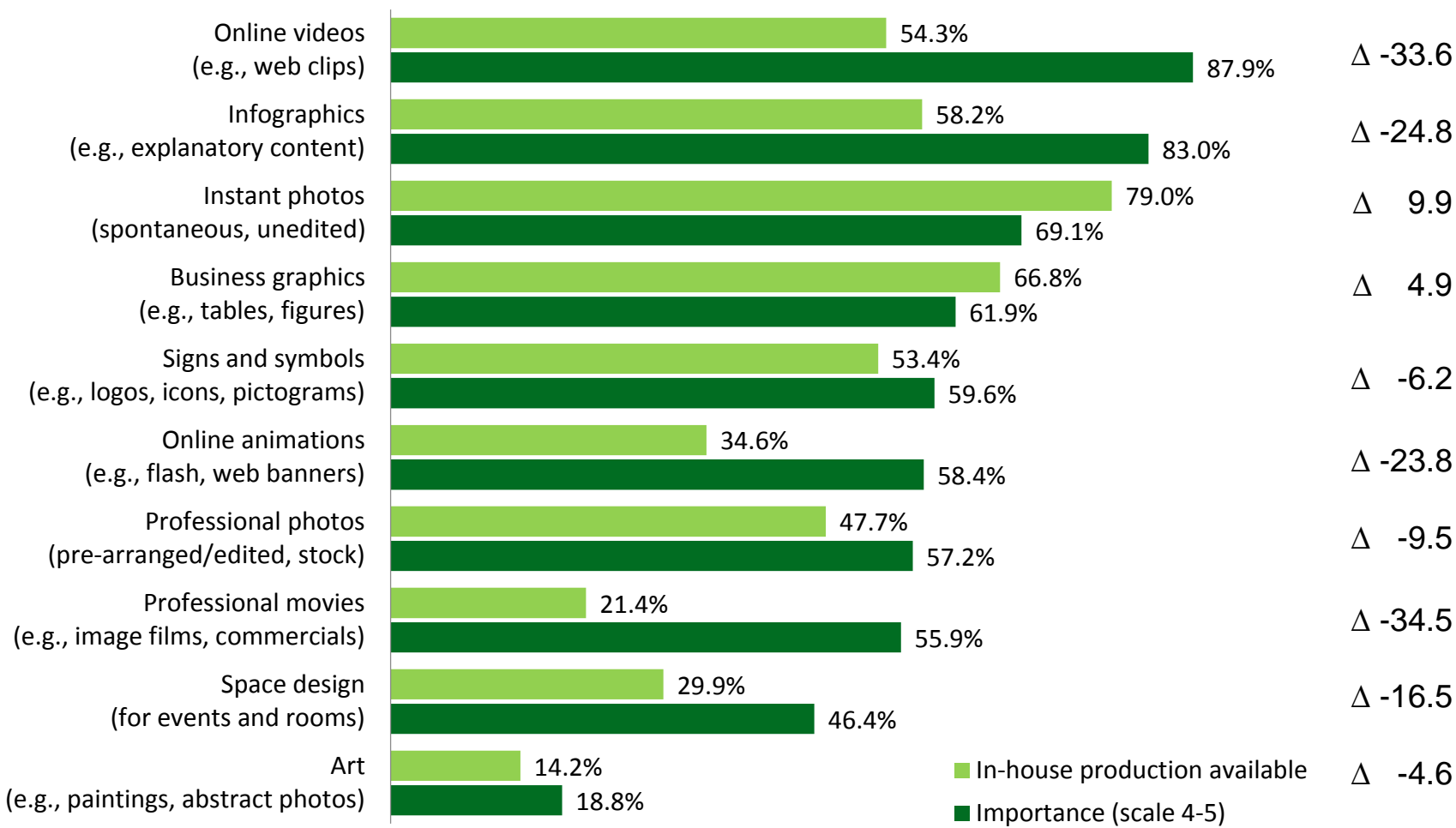
Practitioners working in media relations have a significantly different understanding of visual communication compared to peers in other roles



Importance of different visual elements for strategic communication in European organisations, compared with three years ago



Personal and technical capacities to produce visual elements are lagging behind – except for instant photos and business graphics

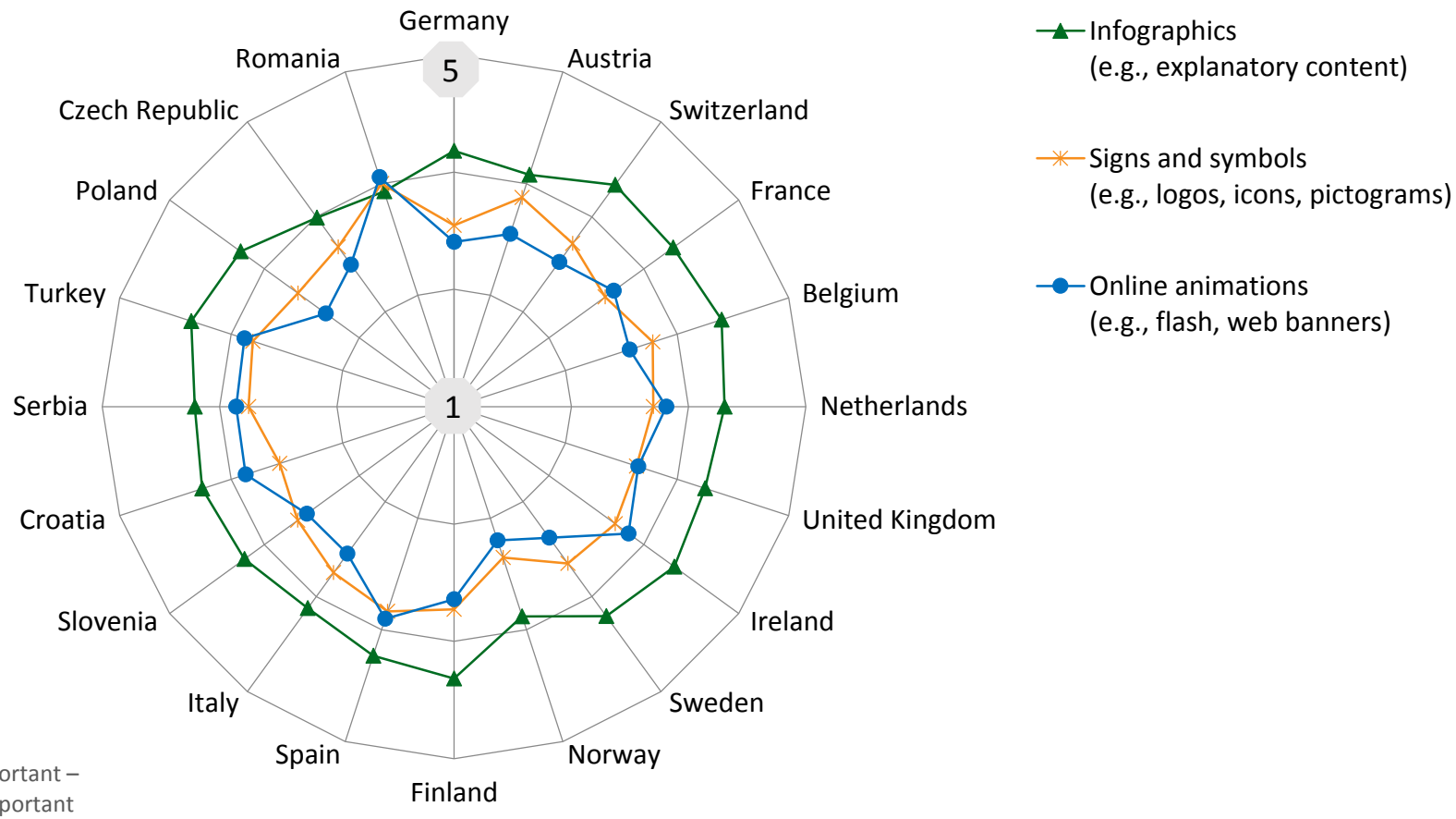


Perceived importance and in-house production capacities for visual communication in various types of organisations

	Joint stock companies		Private companies		Governmental organisations		Non-profit organisations		Consultancies & Agencies	
	Importance	In-house	Importance	In-house	Importance	In-house	Importance	In-house	Importance	In-house
Online videos (e.g., web clips)	88.8%	50.3%	88.2%	53.5%	86.4%	61.7%	89.7%	54.3%	86.9%	54.0%
Infographics (e.g., explanatory content)	85.4%	49.3%	79.3%	62.7%	81.1%	55.7%	87.7%	51.6%	83.0%	66.8%
Instant photos (spontaneous, unedited)	69.4%	76.1%	68.0%	77.0%	67.9%	86.7%	74.7%	83.0%	67.8%	76.6%
Business graphics (e.g., tables, figures)	61.9%	65.0%	60.8%	70.5%	60.9%	64.5%	60.1%	58.7%	64.3%	70.4%
Signs and symbols (e.g., logos, icons, pictograms)	63.5%	51.5%	61.4%	57.4%	56.1%	52.0%	62.3%	44.6%	55.4%	57.0%
Online animations (e.g., flash, web banners) **	63.9%	32.7%	57.0%	40.3%	54.8%	30.3%	56.3%	24.7%	58.2%	39.0%
Professional photos (pre-arranged/edited, stock) **	52.8%	40.5%	62.6%	50.5%	59.3%	51.8%	55.6%	44.2%	55.8%	50.7%
Professional movies (e.g., image films, commercials) **	56.9%	20.1%	59.7%	21.6%	51.8%	21.3%	55.2%	16.4%	54.7%	25.0%
Space design (for events and rooms) **	52.9%	27.6%	51.0%	34.0%	37.9%	28.2%	40.1%	25.3%	45.2%	31.6%
Art (e.g., paintings, abstract photos) **	18.1%	9.8%	20.0%	17.5%	13.3%	12.1%	16.1%	10.3%	23.0%	18.3%

www.communicationmonitor.eu / Zerfass et al. 2017 / n = 3,387 communication professionals. Q 2: Please rate the relative importance of the following elements for the communication activities of your organisation compared with 3 years ago. Scale 1 (Less important) – 5 (More important). ** Highly significant differences (chi-square test, $p \leq 0.01$). Q 2 (continued): ... And does your organisation have personal and technical capacities to produce these elements? Percentages: Frequency based on agreement. Highly significant differences for all items (chi-square test, $p \leq 0.01$).

Country-to-country assessment of visual elements and their importance for strategic communication



Scale:
(1) Less important –
(5) More important

In-house capacities to produce visual elements in Western and Northern Europe

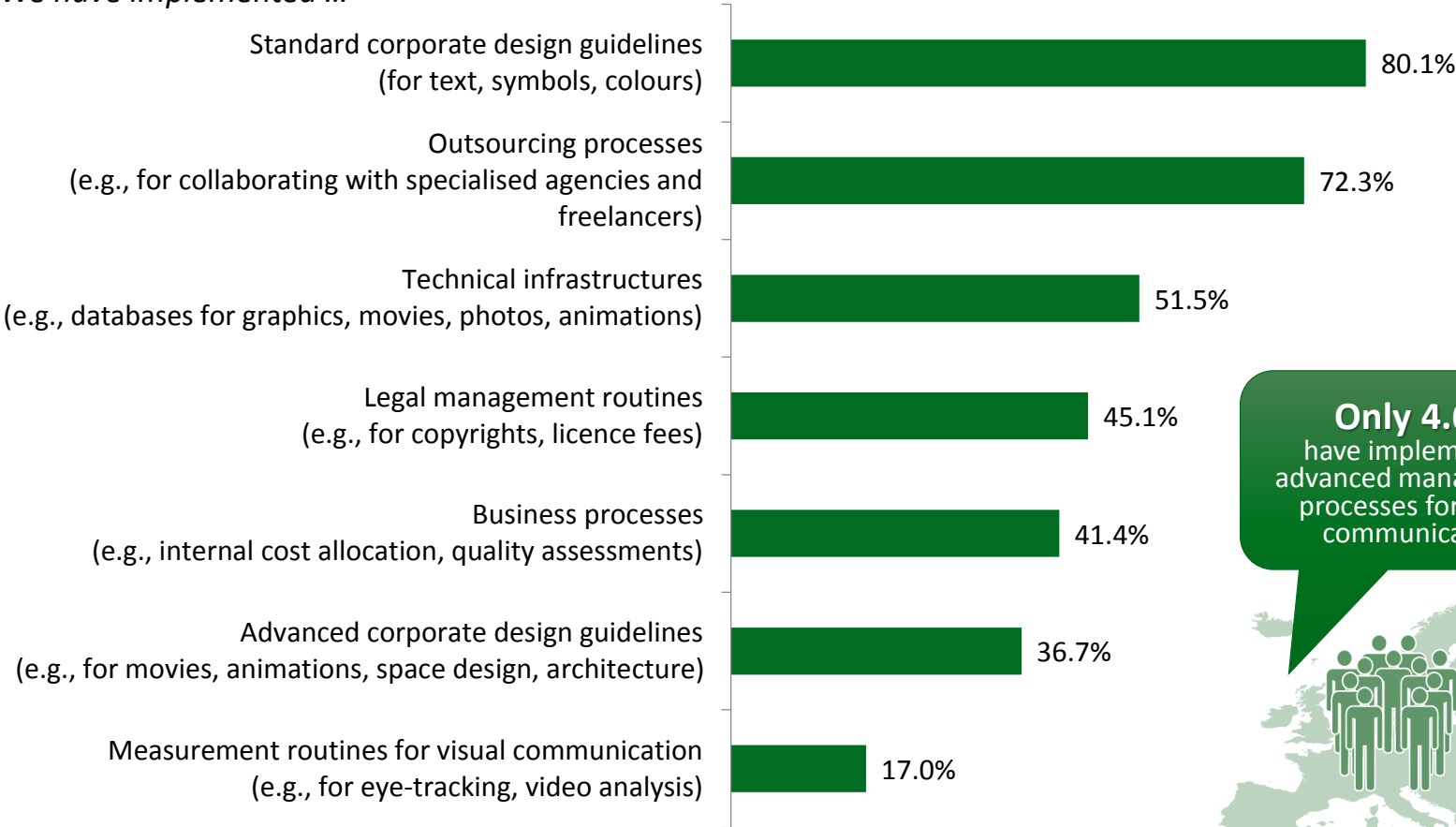
	Online videos	Info-graphics	Instant photos	Business graphics	Signs and symbols	Online animations	Professional photos	Professional movies	Space design	Art
Germany	54.9%	54.5%	78.7%	64.4%	54.5%	34.4%	45.8%	21.7%	26.5%	10.3%
Austria	48.4%	60.9%	75.0%	70.3%	51.6%	21.9%	37.5%	9.4%	25.0%	7.8%
Switzerland	53.4%	47.5%	73.5%	58.3%	46.6%	27.9%	39.7%	18.6%	26.5%	10.3%
France	49.2%	58.3%	73.3%	61.7%	51.7%	42.5%	48.3%	26.7%	30.8%	14.2%
Belgium	48.6%	52.3%	81.0%	63.9%	56.5%	30.1%	43.5%	23.1%	27.8%	6.9%
Netherlands	50.3%	47.6%	68.8%	56.1%	42.9%	24.3%	32.8%	18.0%	27.5%	6.9%
United Kingdom	58.9%	67.3%	78.9%	75.2%	57.7%	43.4%	46.5%	27.9%	29.3%	11.3%
Ireland	50.0%	59.4%	80.2%	60.4%	46.2%	20.8%	34.0%	15.1%	23.6%	10.4%
Sweden	75.2%	54.5%	94.2%	63.6%	48.8%	30.6%	47.9%	28.9%	23.1%	14.0%
Norway	70.3%	47.3%	89.0%	56.0%	38.5%	30.8%	50.5%	23.1%	18.7%	11.0%
Finland	76.0%	53.6%	94.4%	69.3%	49.2%	26.8%	45.3%	8.9%	23.5%	11.2%

In-house capacities to produce visual elements in Southern and Eastern Europe

	Online videos	Info-graphics	Instant photos	Business graphics	Signs and symbols	Online animations	Professional photos	Professional movies	Space design	Art
Spain	55.4%	62.0%	78.5%	65.3%	61.2%	35.5%	62.0%	32.2%	37.2%	24.0%
Italy	48.3%	49.4%	72.2%	60.0%	50.6%	36.7%	41.7%	25.6%	28.9%	17.8%
Slovenia	52.6%	57.9%	81.6%	67.5%	52.6%	32.5%	46.5%	9.6%	32.5%	4.4%
Croatia	39.8%	56.5%	79.6%	65.7%	45.4%	32.4%	44.4%	14.8%	30.6%	14.8%
Serbia	69.4%	65.9%	82.4%	78.8%	70.6%	56.5%	69.4%	34.1%	49.4%	28.2%
Turkey	43.3%	61.2%	67.2%	65.7%	43.3%	26.9%	56.7%	22.4%	32.8%	17.9%
Poland	39.7%	69.1%	76.5%	73.5%	57.4%	26.5%	52.9%	14.7%	25.0%	13.2%
Czech Republic	53.7%	67.5%	86.2%	74.0%	64.2%	36.6%	53.7%	22.0%	35.8%	17.9%
Romania	54.7%	66.3%	67.4%	72.1%	67.4%	48.3%	69.8%	27.9%	43.6%	32.6%

Management routines for visual communication in European organisations

We have implemented ...

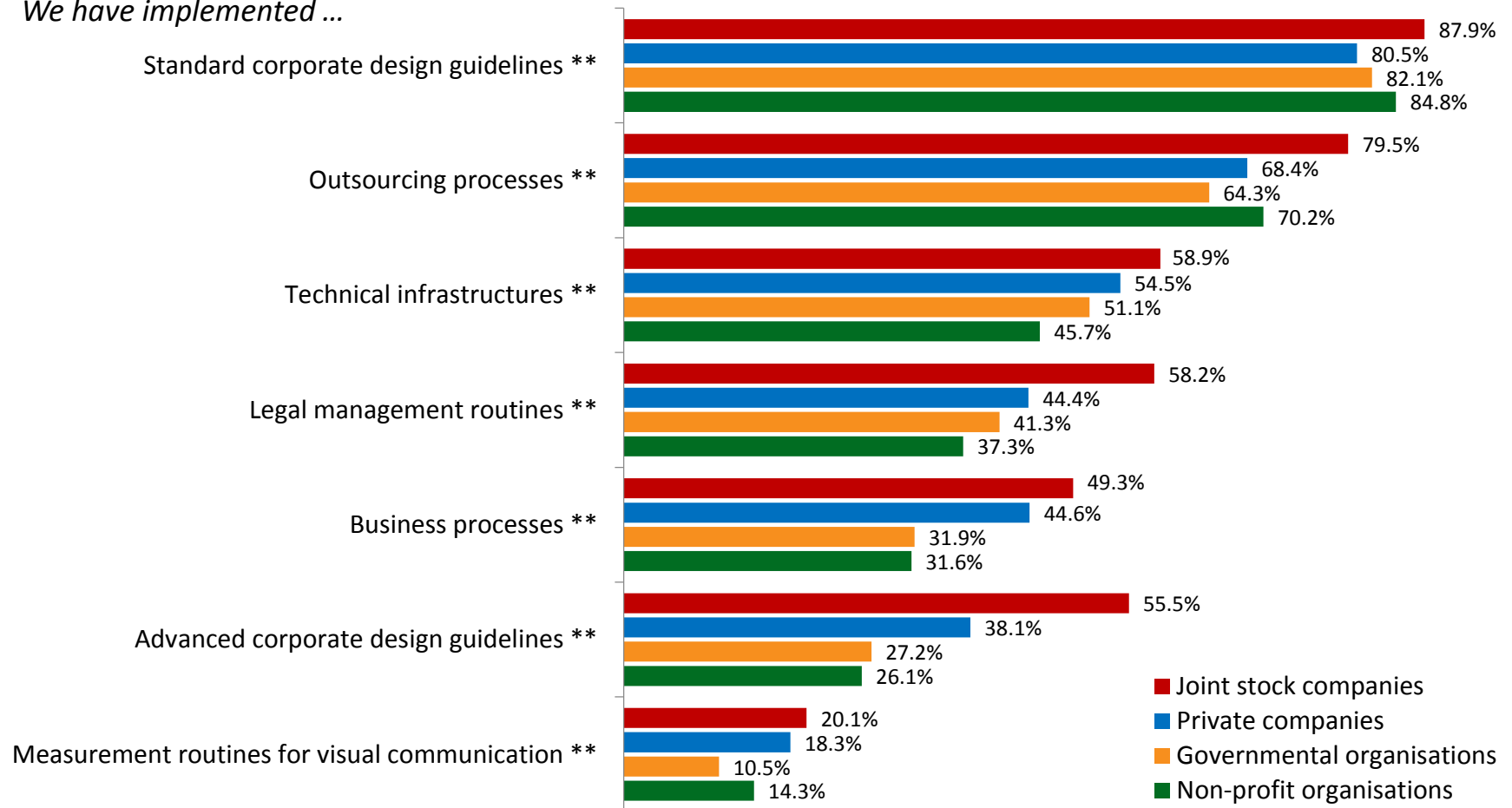


Only 4.6%
have implemented
advanced management
processes for visual
communication



Joint stock companies have implemented management routines for visual communication to a much higher extent

We have implemented ...



www.communicationmonitor.eu / Zerfass et al. 2017 / n = 2,472 communication professionals in communication departments. Q 3: How does your organisation manage visual communication? Please tick all items that apply for your communication department or agency. We have implemented ...

** Highly significant differences (chi-square test, $p \leq 0.01$).

Management routines for visual communication in Western and Northern Europe

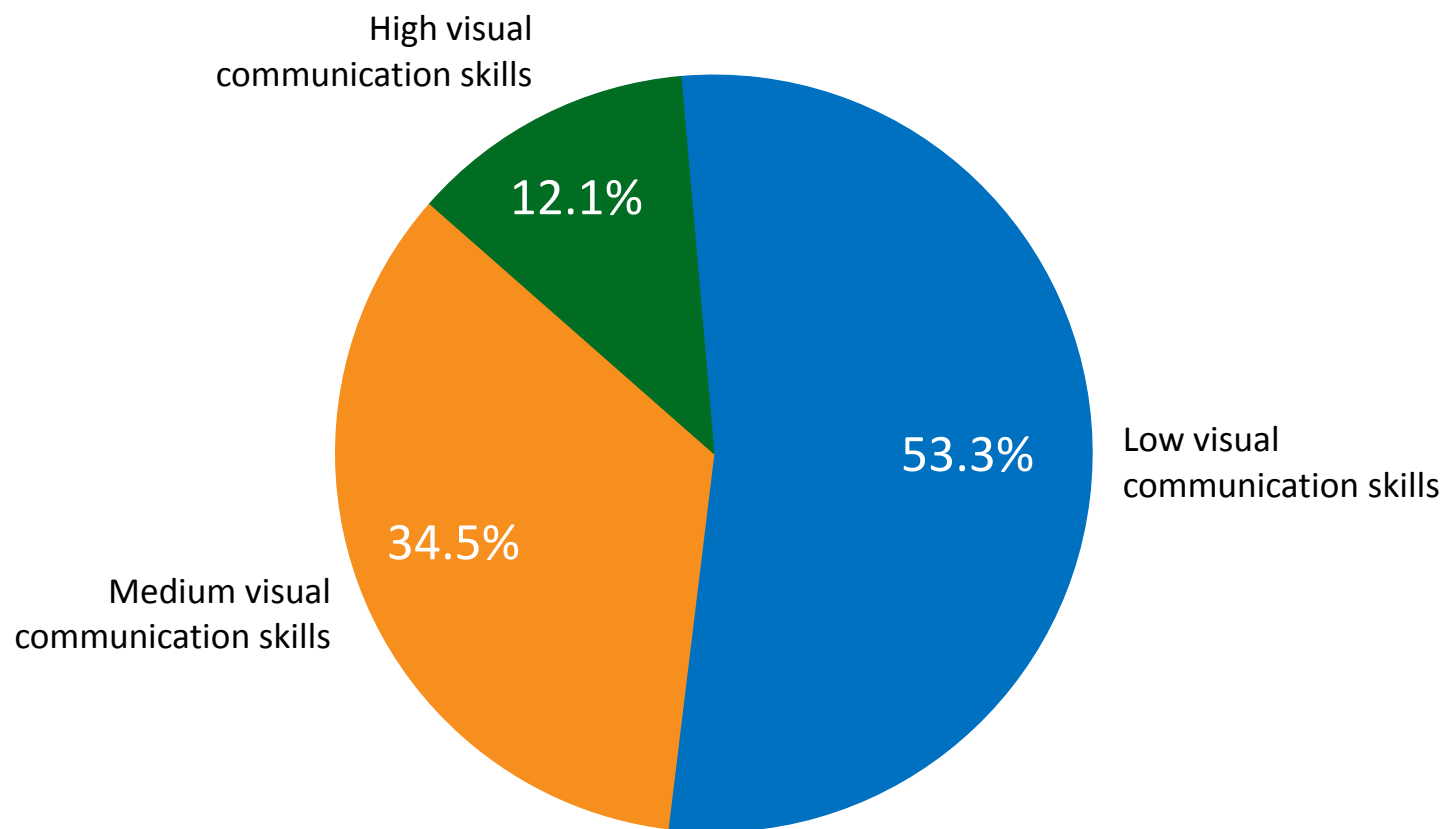
	Standard corporate design guidelines	Outsourcing processes	Technical infrastructures	Legal management routines	Business processes	Advanced corporate design guidelines	Measurement routines for visual communication
Germany	82.0%	80.4%	60.8%	55.2%	44.0%	40.4%	15.6%
Austria	76.6%	67.2%	51.6%	39.1%	31.3%	29.7%	7.8%
Switzerland	81.4%	74.0%	56.4%	47.1%	42.6%	40.2%	12.3%
France	76.5%	72.3%	42.9%	50.4%	44.5%	35.3%	22.7%
Belgium	84.5%	77.9%	58.2%	44.6%	31.0%	38.0%	13.1%
Netherlands	80.2%	74.9%	56.7%	44.4%	40.6%	42.8%	17.1%
United Kingdom	87.4%	69.6%	49.3%	43.3%	40.1%	49.6%	24.6%
Ireland	74.5%	82.1%	34.0%	28.3%	24.5%	42.5%	18.9%
Sweden	87.6%	62.8%	55.4%	45.5%	38.0%	33.9%	9.1%
Norway	84.4%	66.7%	54.4%	43.3%	26.7%	30.0%	10.0%
Finland	89.7%	70.9%	54.9%	46.3%	36.0%	37.7%	11.4%

www.communicationmonitor.eu / Zerfass et al. 2017 / n = 2,889 communication professionals from 20 countries. Q 3: How does your organisation manage visual communication? Please tick all items that apply for your communication department or agency. We have implemented ... Highly significant differences for all items (chi-square test, $p \leq 0.01$).

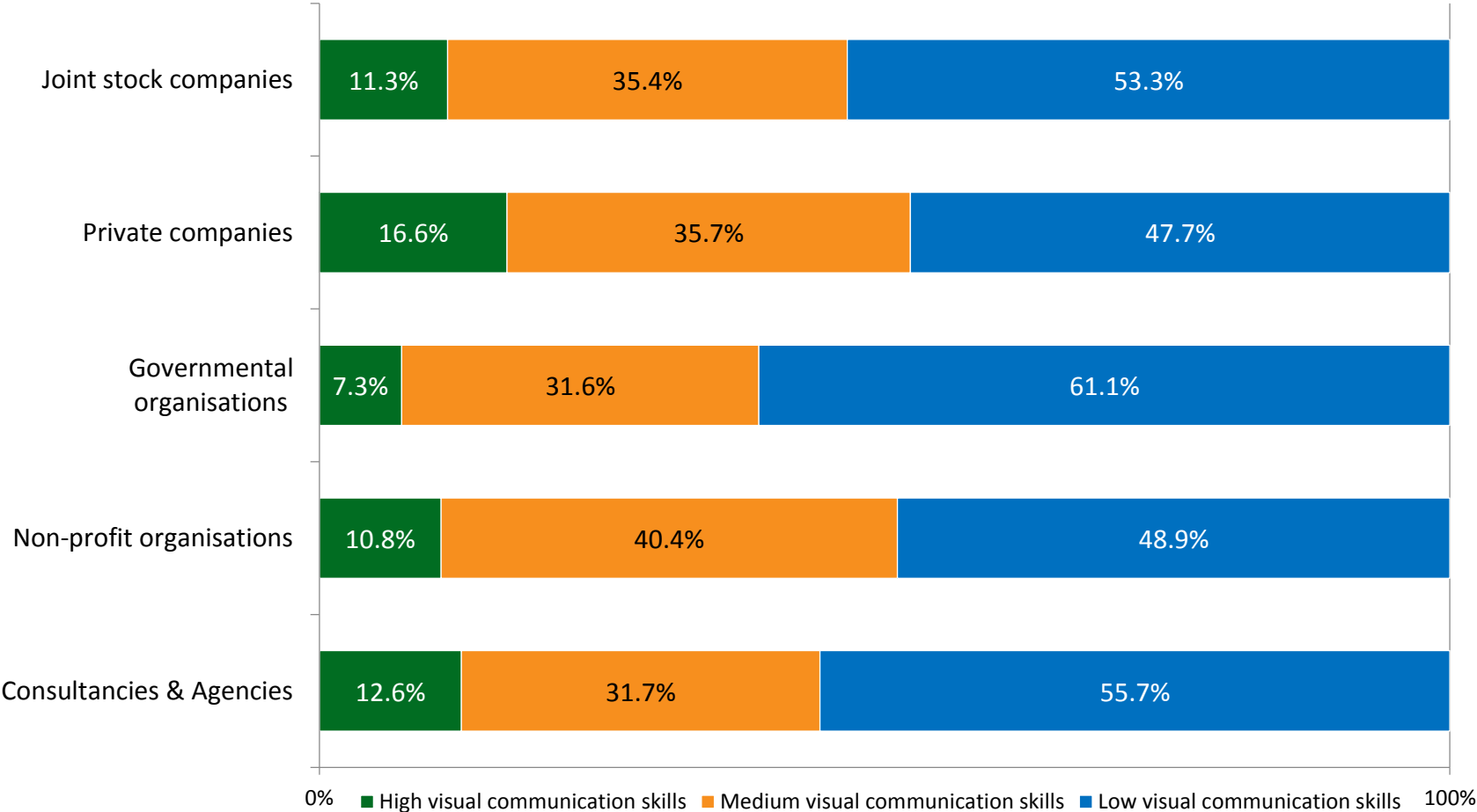
Management routines for visual communication in Southern and Eastern Europe

	Standard corporate design guidelines	Outsourcing processes	Technical infrastructures	Legal management routines	Business processes	Advanced corporate design guidelines	Measurement routines for visual communication
Spain	82.5%	65.8%	45.8%	50.8%	38.3%	45.8%	20.0%
Italy	75.3%	77.0%	47.8%	39.3%	39.3%	34.3%	16.9%
Slovenia	72.7%	67.3%	50.0%	31.8%	25.5%	38.2%	10.9%
Croatia	68.9%	73.6%	38.7%	39.6%	20.8%	38.7%	9.4%
Serbia	72.8%	70.4%	51.9%	60.5%	33.3%	53.1%	19.8%
Turkey	67.2%	73.1%	46.3%	56.7%	34.3%	35.8%	20.9%
Poland	78.8%	77.3%	59.1%	54.5%	25.8%	31.8%	15.2%
Czech Republic	76.0%	71.1%	50.4%	48.8%	31.4%	43.0%	14.9%
Romania	74.7%	59.3%	51.2%	46.3%	45.7%	52.5%	29.0%

Every second professional has limited competencies for visual communication

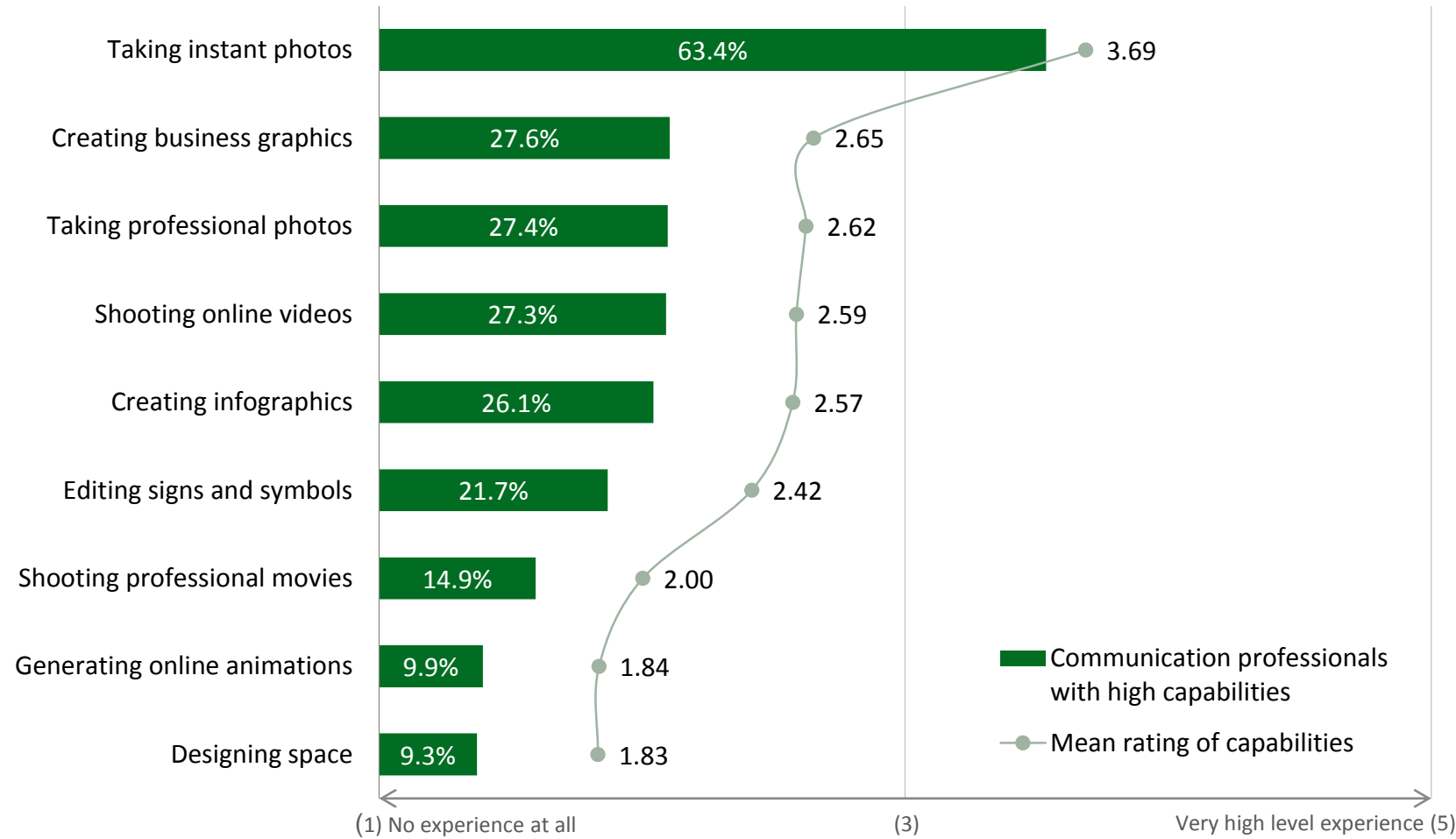


Competencies for visual communication are more prevalent in private companies and non-profits; low skills are surprisingly often reported by agencies

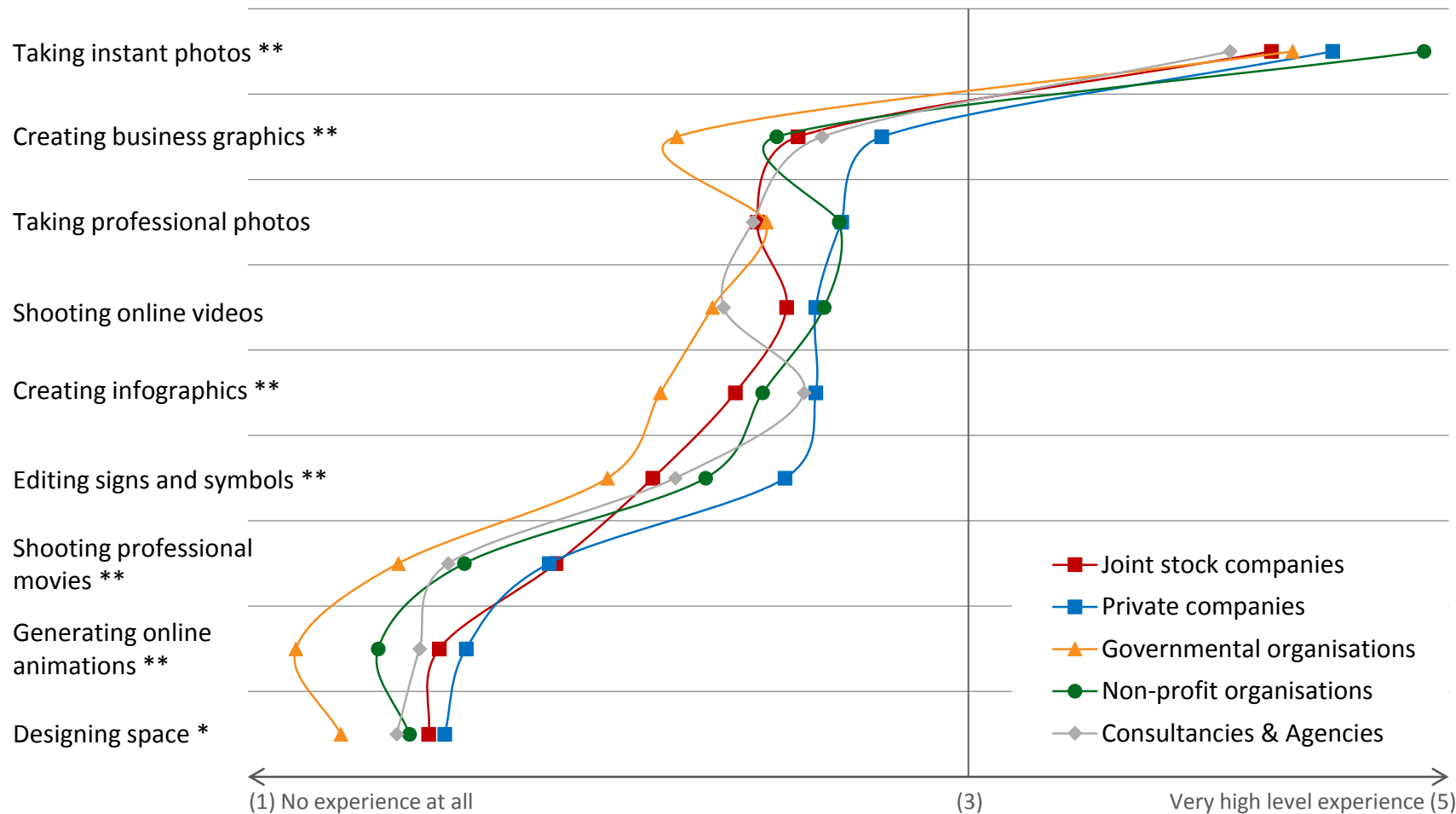


www.communicationmonitor.eu / Zerfass et al. 2017 / n = 3,387 communication professionals. Q 4: How would you rate your personal competencies in the following areas? (9 skills, scale 1-5, as listed on p. 35). Low visual communication skills: mean value of all competencies < 2.50. Medium visual communication skills: 2.50 ≤ mean value of all competencies ≤ 3.50. High visual communication skills: mean value of all competencies > 3.50. Highly significant differences between types of organisations (chi-square test, p ≤ 0.01, Cramér's V = 0.082).

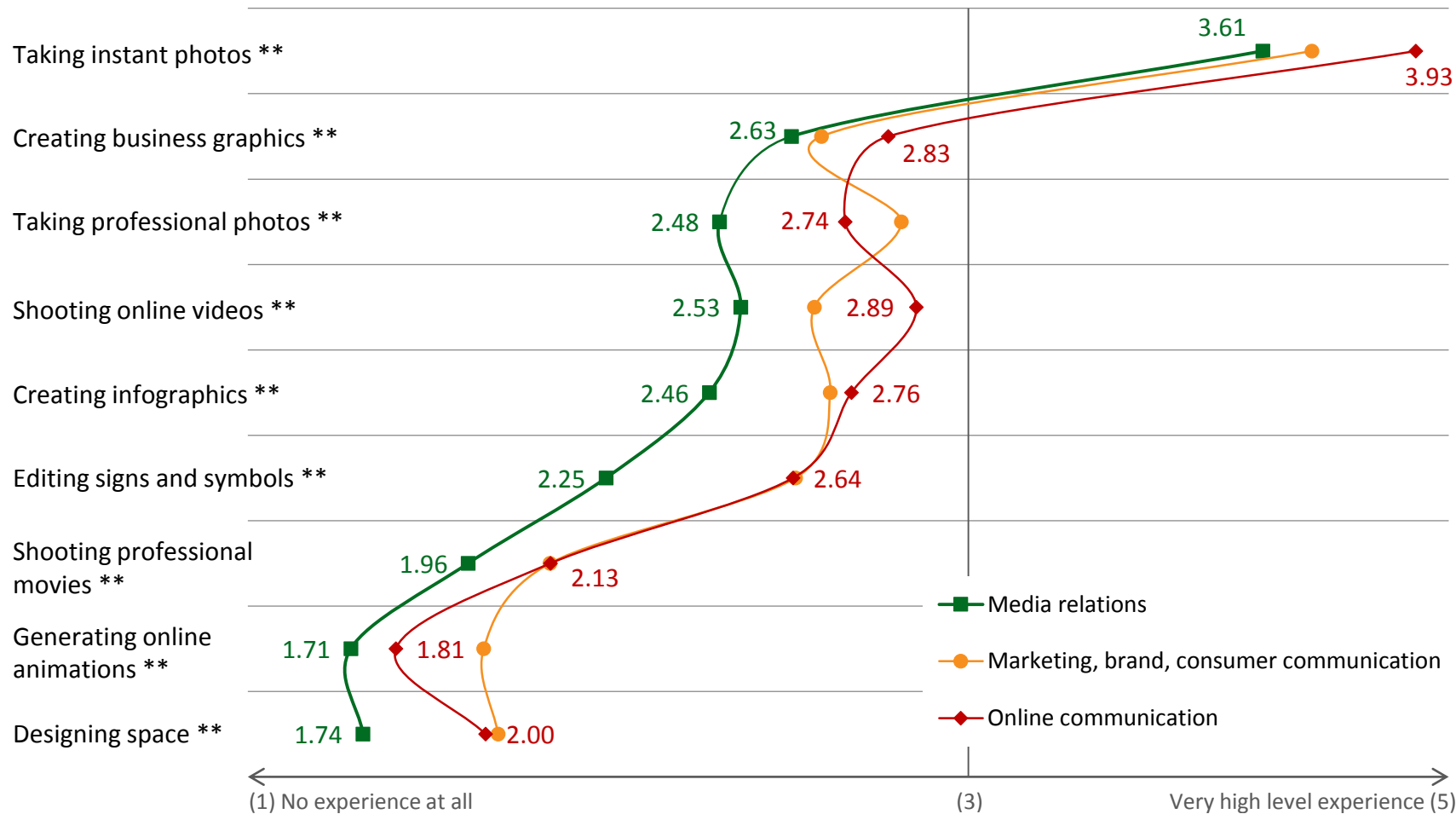
Personal competencies of communication professionals are low in nearly all fields of visual communication – also in the areas of online videos and infographics



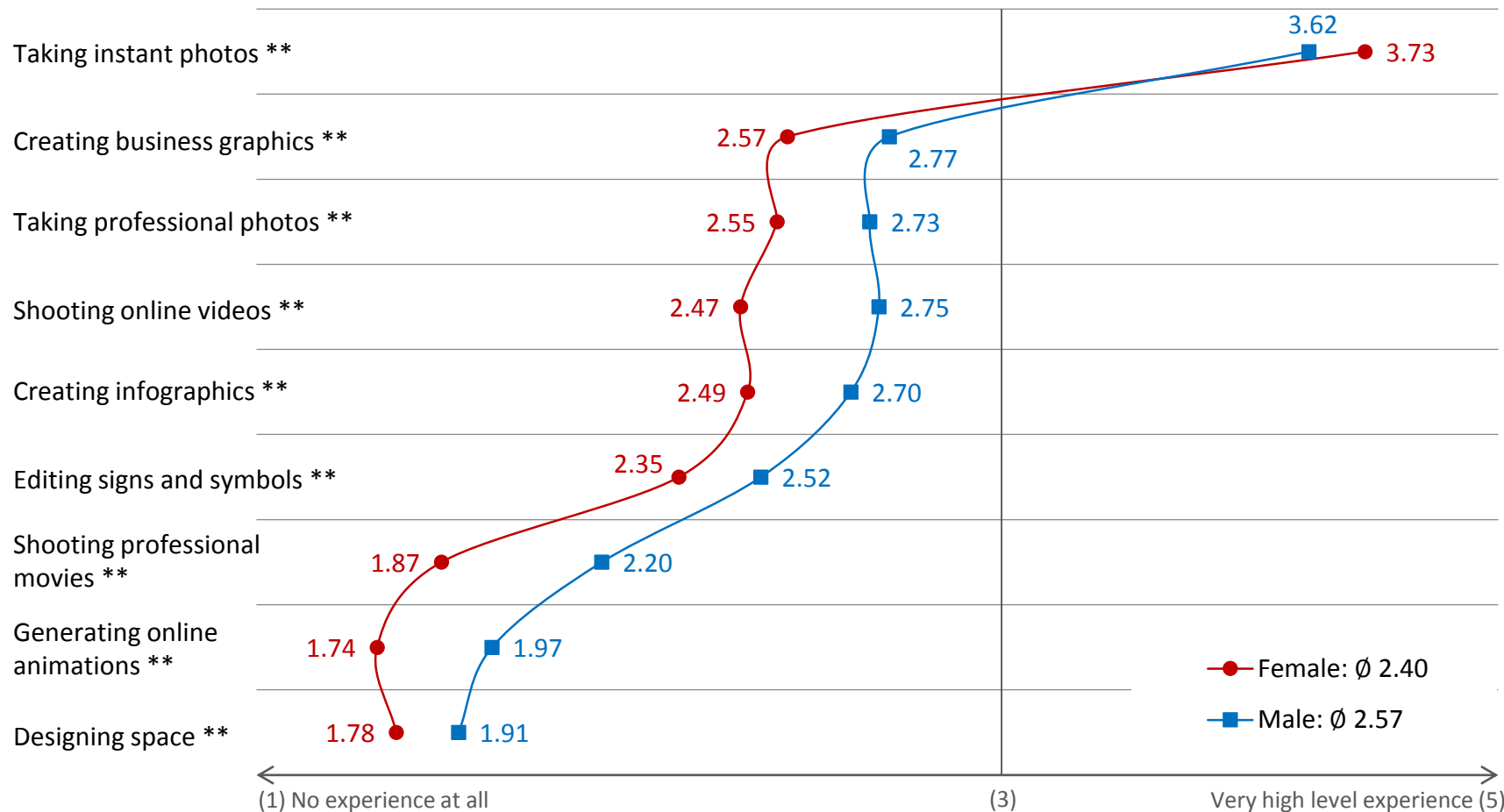
Professionals working in private companies are more skilled in visual communications than their peers



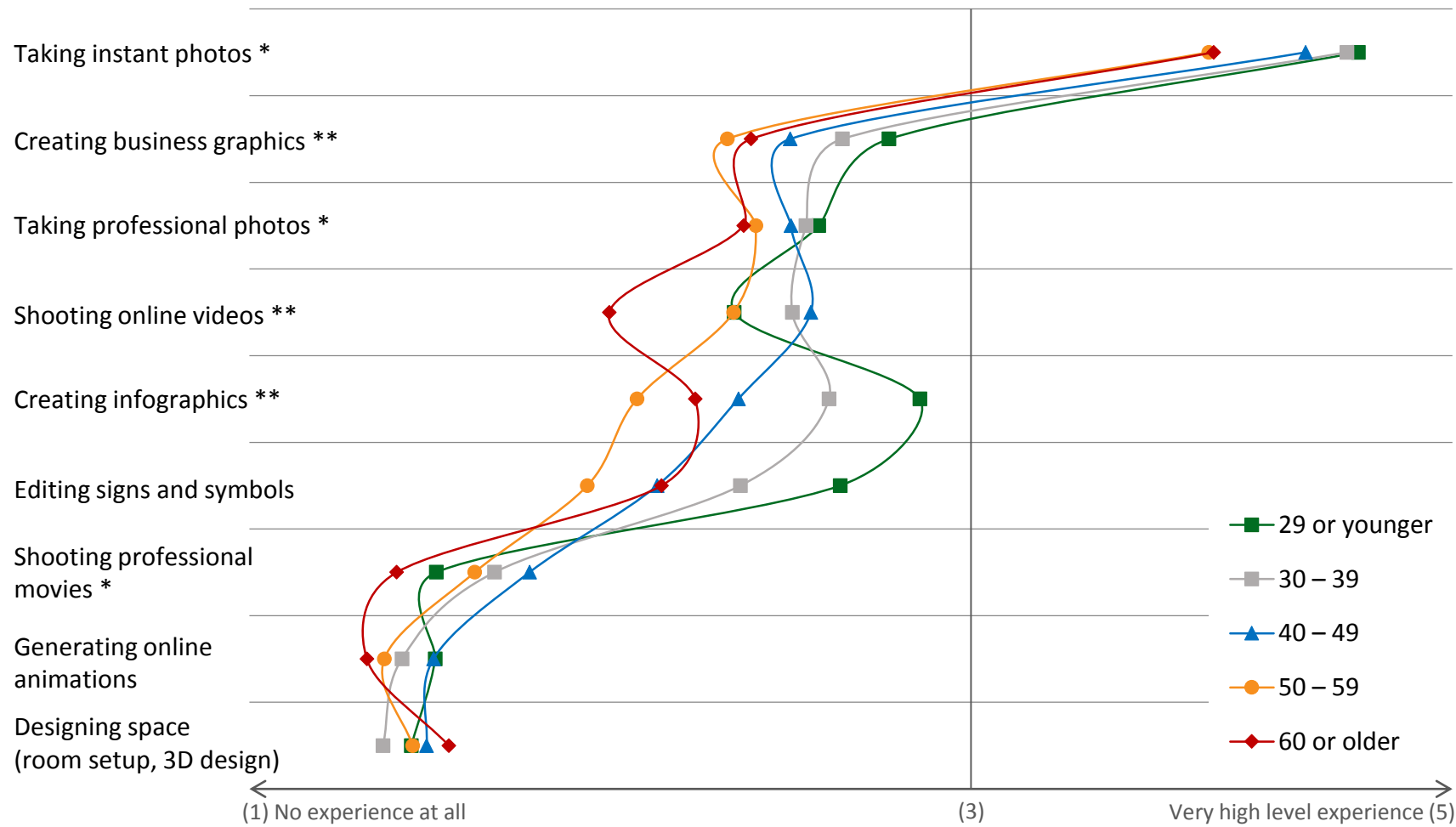
Media relations practitioners report less visual competencies than those in online and marketing communications



Male professionals report a higher level of visual communication competencies than their female peers



Younger professionals are more skilled in visual communication, but their overall competencies are still below average



www.communicationmonitor.eu / Zerfass et al. 2017 / n = 3,387 communication professionals. Q 4: How would you rate your personal competencies in the following areas? Scale 1 (No experience at all) – 5 (Very high level experience). Mean values. * Significant differences (ANOVA/Scheffe post-hoc test, p ≤ 0.05). ** Highly significant differences (ANOVA/Scheffe post-hoc test, p ≤ 0.01).

Social bots – challenges and opportunities



Chapter overview

In communications we like to be on top of contemporary issues be it with media consumption, popular culture, language usage and, particularly, technology. One trending area in communication management is the use and application of software robots, or what we more frequently refer to as ‘social bots’ (Shorey & Howard, 2016). In reality bots have been around since the early days of computers. Compelling examples of bots are chatbots or algorithms designed to hold a conversation with a human, as envisioned by Alan Turing (1950) nearly 70 years ago. Ferrara et al. (2016) define a social bot as “a computer algorithm that automatically produces content and interacts with humans on social media, trying to emulate and possibly alter their behaviour” (p. 96). But what is the purpose and what are the intentions of social bots? Some of them are benign and, in principle, innocuous or even helpful: this category includes bots that automatically aggregate content from various sources, like simple news feeds. Automatic responders to inquiries are increasingly adopted by brands and companies for customer care. Nevertheless these types of bots can sometimes be harmful, for example when they contribute to the spread of unverified information or rumours (Ferrara et al., 2016).

We are also now much more aware how social bots have been heavily used and possibly influenced political election outcomes such as during the United States presidential campaign in 2016 (Bessi & Ferrara, 2016; Kollanyi et al., 2016) as well as during the BREXIT vote in the United Kingdom (Howard & Kollanyi, 2016). The presence of social bots in political discussion can create three tangible issues: first, influence can be redistributed across suspicious accounts that may be operated with malicious purposes; second, the political conversation can become further polarized; third, the spreading of misinformation and unverified information can be enhanced (Bessi & Ferrara, 2016). Fake social media accounts now spread pro-governmental messages, beef up web site follower numbers, and cause artificial trends. Bot generated propaganda and misdirection has become a worldwide strategy. Robotic lobbying tactics have been deployed in several countries. Indeed, experts estimate that bot traffic now makes up over 60 per cent of all traffic online – up nearly twenty percent from just two years ago (Forelle et al., 2015).

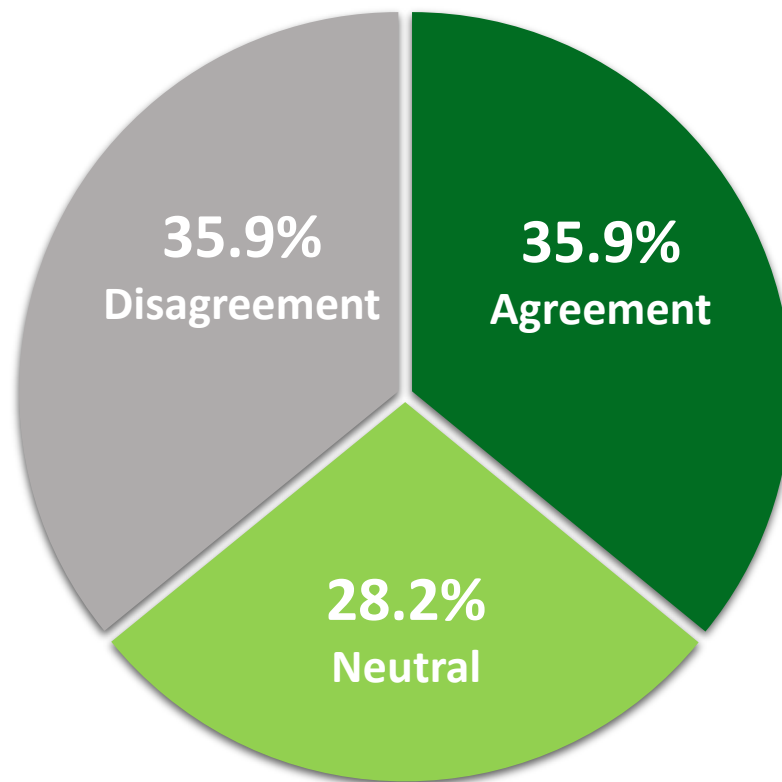
Despite the growing commercial and political application of social bots, from the ECM 2017 data it’s noticeable that this phenomenon is largely neglected by many communication professionals in Europe. Only one third follow the debate about social bots and 15.9 per cent have no idea about the topic at all. In this context social bots are mainly seen as a threat for public debates and organisational reputation alike, although four out of ten respondents do also see opportunities arising from them. 73.2 per cent of all respondents agree that social bots present ethical challenges for the profession.

When we look at practitioner groups there are differences with media relations practitioners being the least on top of the debates about social bots and they also have the greatest level of fear about them. Despite the clear usage and adoption in national political arenas non-profit and governmental organisations are more sceptical about social bots than those in companies. Consultancies, agencies and companies are the most receptive and open minded when it comes to using and integrating social bots within their work.

Looking to the future very few organisations (6.2 per cent) use social bots for strategic communication today and only a minority (8.5 per cent) plan to use them in the near future. Those communication departments and agencies that already apply social bots use them mostly for automated responses or for identifying and following others on social media.

Social bots are a phenomenon which is neglected by many communication practitioners in Europe

*I have followed the debate about social bots
(automated software applications that run social media accounts)*



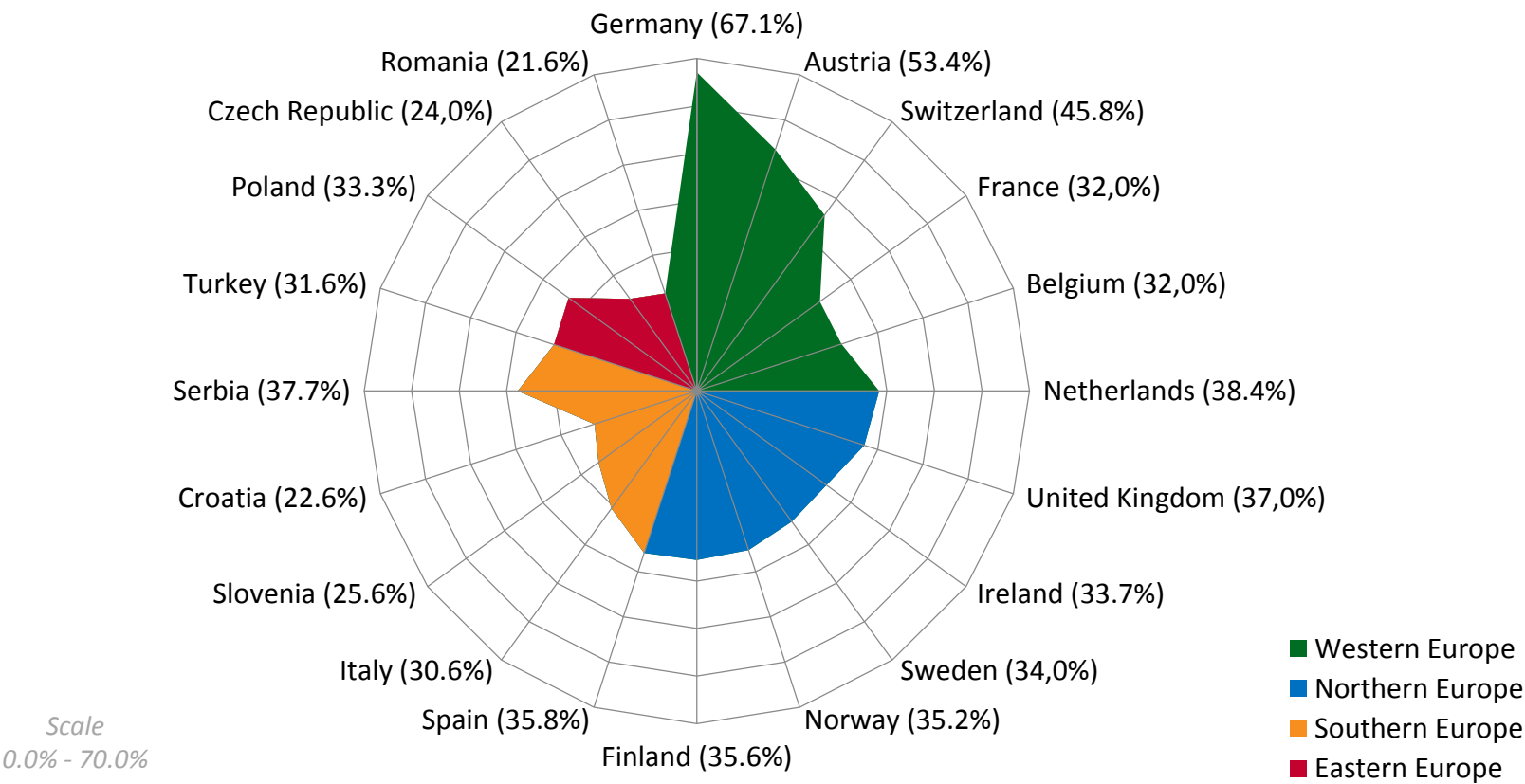
15.9%
of practitioners in
Europe have no clue at
all about social bots



www.communicationmonitor.eu / Zerfass et al. 2017 / n = 3,387 communication professionals. Q 7: Nowadays many social media accounts are run by automated software applications, so-called “social bots”. They are communicating much faster and more intensively than humans – which has stimulated a debate about this phenomenon, e.g., during the recent US presidential campaign and among strategic communication experts. Please rate these statements based on your experience. Scale 1 (Strongly disagree) – 5 (Strongly agree). Alternative answer: “I don’t know at all”. Disagreement = scale points 1-2; Neutral = scale point 3; Agreement = scale points 4-5. No clue at all = selection of alternative answer.

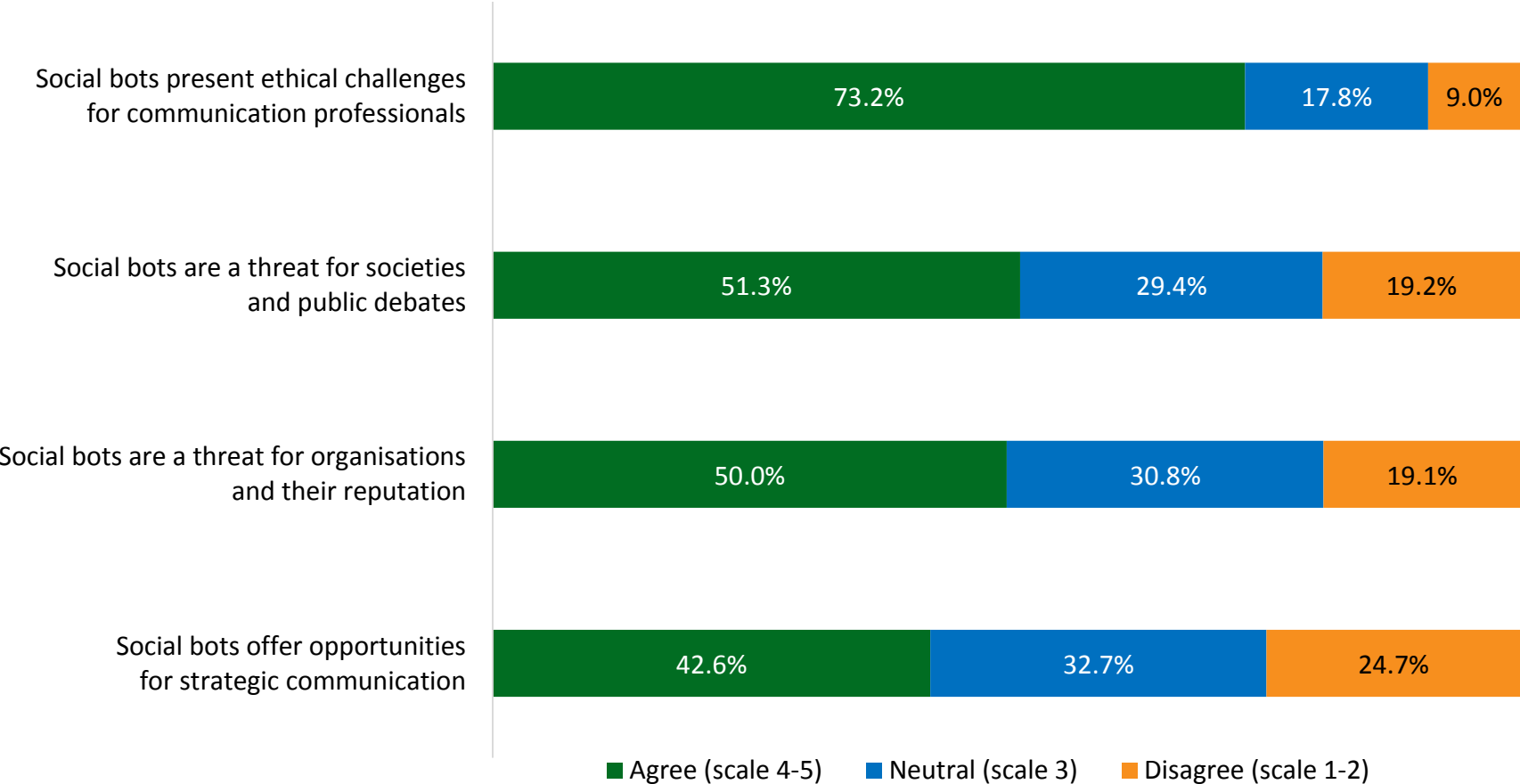
Communication practitioners in the German speaking countries are more attentive to the debate about social bots

I have followed the debate about social bots



www.communicationmonitor.eu / Zerfass et al. 2017 / n ≥ 2,468 communication professionals from 20 countries. Q 7: Nowadays many social media accounts are run by automated software applications, so-called “social bots”. They are communicating much faster and more intensively than humans – which has stimulated a debate about this phenomenon, e.g., during the recent US presidential campaign and among strategic communication experts. Please rate this statement based on your experience: “I have followed the debate about social bots”. Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequency based on scale points 4-5.

Social bots are predominantly viewed as a threat – but four out of ten communication professionals also see opportunities arising



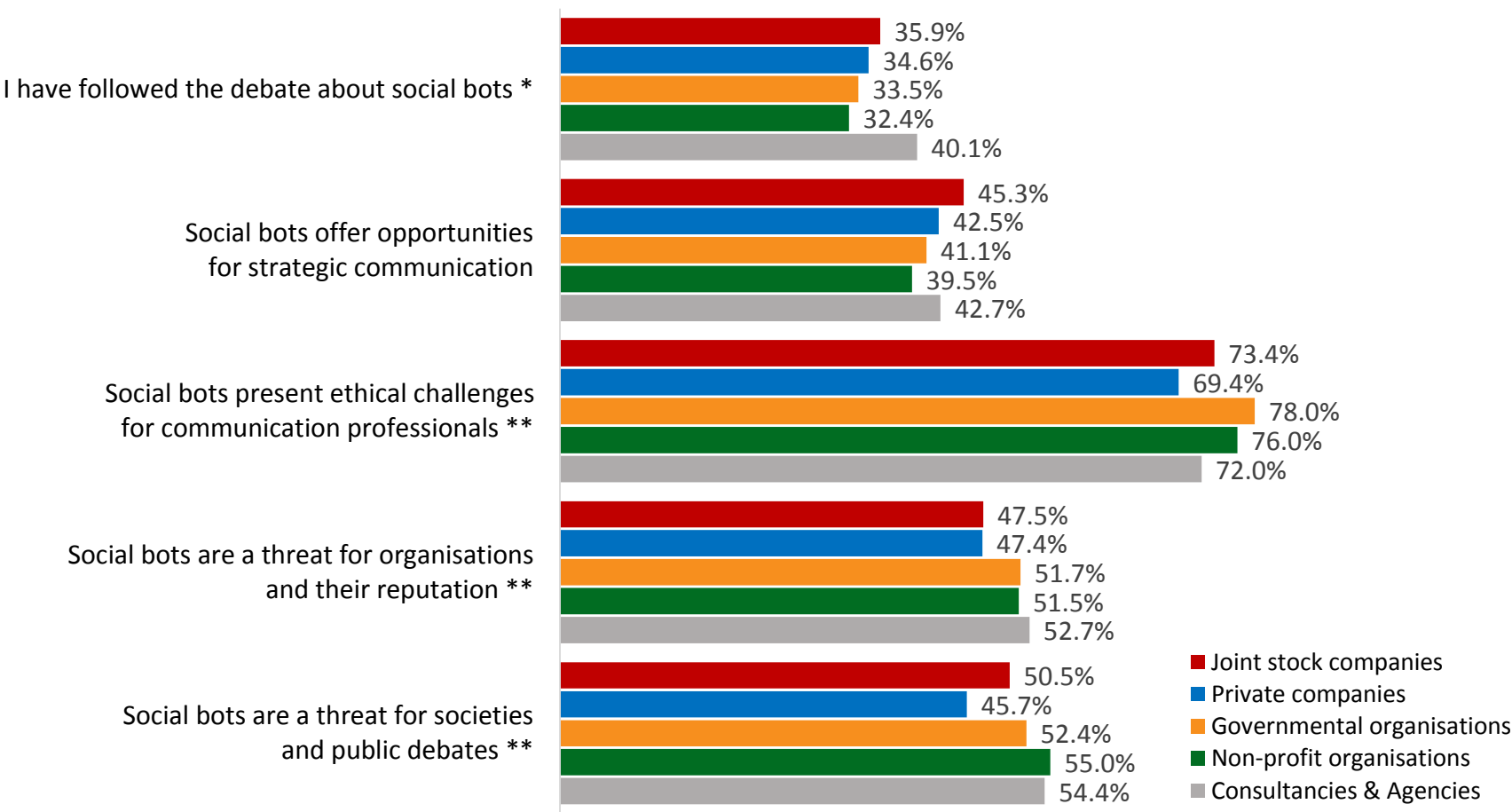
www.communicationmonitor.eu / Zerfass et al. 2017 / n = 2,848 communication professionals. Q 7: Nowadays many social media accounts are run by automated software applications, so-called “social bots”. They are communicating much faster and more intensively than humans – which has stimulated a debate about this phenomenon, e.g., during the recent US presidential campaign and among strategic communication experts. Please rate these statements based on your experience. Scale 1 (Strongly disagree) – 5 (Strongly agree).

Attitudes towards social bots differ across Europe

	Social bots present ethical challenges for communication professionals	Social bots are a threat for societies and public debates	Social bots are a threat for organisations and their reputation	Social bots offer opportunities for strategic communication		Social bots present ethical challenges for communication professionals	Social bots are a threat for societies and public debates	Social bots are a threat for organisations and their reputation	Social bots offer opportunities for strategic communication
Germany	84.8%	64.6%	59.9%	43.9%	Finland	77.9%	47.7%	49.0%	44.3%
Austria	81.0%	55.2%	43.1%	37.9%	Spain	68.9%	48.1%	47.2%	56.6%
Switzerland	80.8%	57.1%	55.4%	45.8%	Italy	66.7%	42.4%	43.1%	34.7%
France	72.0%	58.0%	55.0%	45.0%	Slovenia	67.8%	54.4%	47.8%	31.1%
Belgium	78.3%	58.3%	52.6%	43.4%	Croatia	69.0%	51.2%	50.0%	38.1%
Netherlands	79.9%	50.9%	49.7%	49.1%	Serbia	63.8%	49.3%	55.1%	30.4%
United Kingdom	75.7%	49.8%	52.5%	37.4%	Turkey	50.9%	43.9%	43.9%	45.6%
Ireland	83.1%	53.9%	61.8%	42.7%	Poland	65.0%	48.3%	58.3%	28.3%
Sweden	89.3%	63.1%	57.3%	59.2%	Czech Republic	78.1%	53.1%	49.0%	40.6%
Norway	64.8%	43.7%	39.4%	46.5%	Romania	56.8%	38.1%	33.8%	48.2%

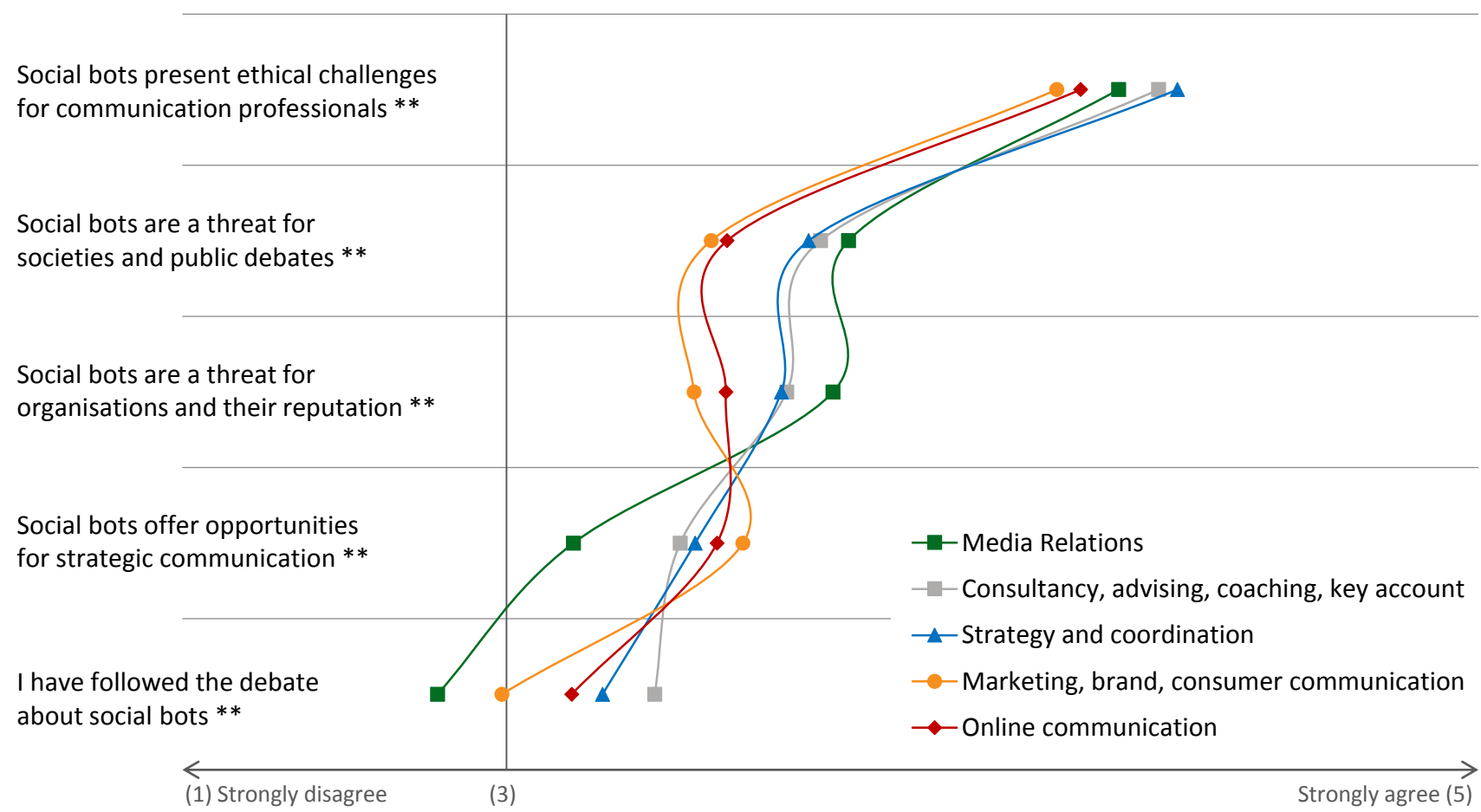
www.communicationmonitor.eu / Zerfass et al. 2017 / n ≥ 2,468 communication professionals from 20 countries. Q 7: Nowadays many social media accounts are run by automated software applications, so-called “social bots”. They are communicating much faster and more intensively than humans – which has stimulated a debate about this phenomenon, e.g., during the recent US presidential campaign and among strategic communication experts. Please rate these statements based on your experience. Percentages: Frequency based on scale points 4-5. Comparison of mean values identifies highly significant differences for items “ethical challenges” and “threat for societies and public debates” (ANOVA/Scheffe post-hoc test, $p \leq 0.01$) and significant differences for item “threat for organisations and their reputation” (ANOVA/Scheffe post-hoc test, $p \leq 0.01$).

Communication practitioners working in non-profits and governmental organisations are more sceptical about social bots than their peers in companies



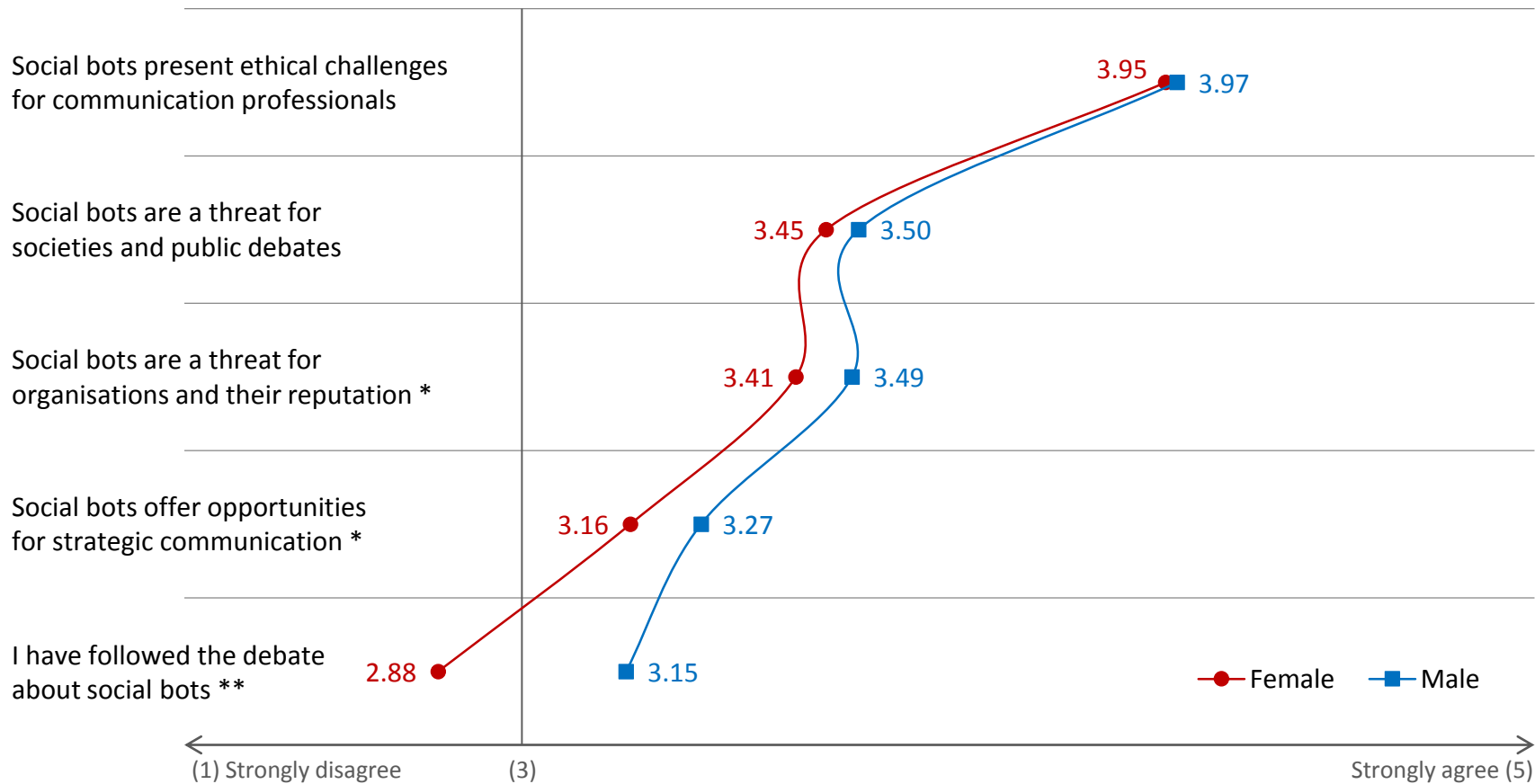
www.communicationmonitor.eu / Zerfass et al. 2017 / n = 2,848 communication professionals. Q 7: Nowadays many social media accounts are run by automated software applications, so-called “social bots”. They are communicating much faster and more intensively than humans – which has stimulated a debate about this phenomenon, e.g., during the recent US presidential campaign and among strategic communication experts. Please rate these statements based on your experience. Scale 1 (Strongly disagree) – 5 (Strongly agree). Percentages: Frequency based on scale points 4-5.

Media relations practitioners have followed the debate about social bots less intensively, additionally they feel significantly more threatened by them



www.communicationmonitor.eu / Zerfass et al. 2017 / n ≥ 481 communication professionals. Q 7: Nowadays many social media accounts are run by automated software applications, so-called “social bots”. They are communicating much faster and more intensively than humans – which has stimulated a debate about this phenomenon, e.g., during the recent US presidential campaign and among strategic communication experts. Please rate these statements based on your experience. Scale 1 (Strongly disagree) – 5 (Strongly agree). ** Highly significant differences (independent samples T-Test, p ≤ 0.01).

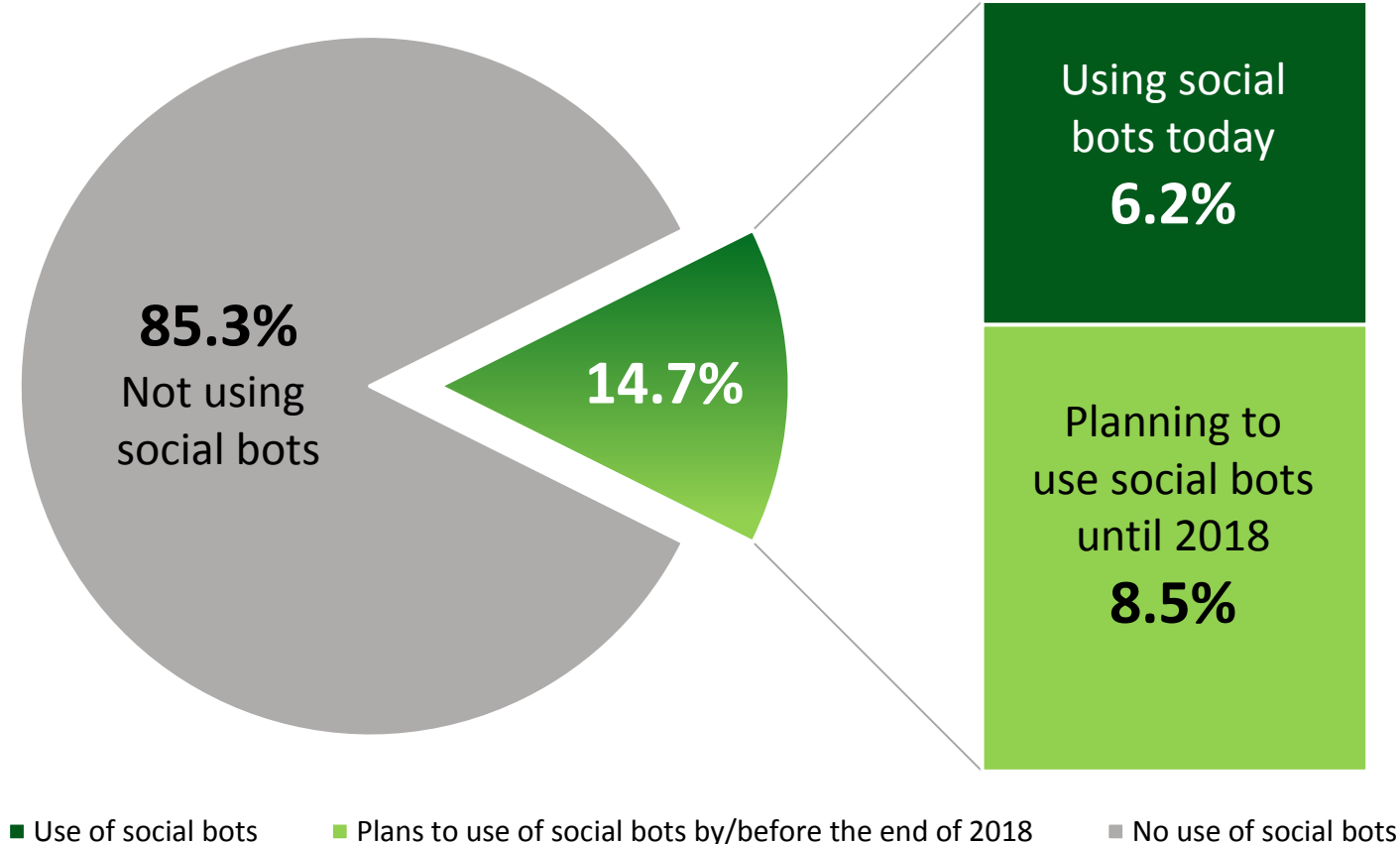
Male professionals are more attentive to social bots than female communicators



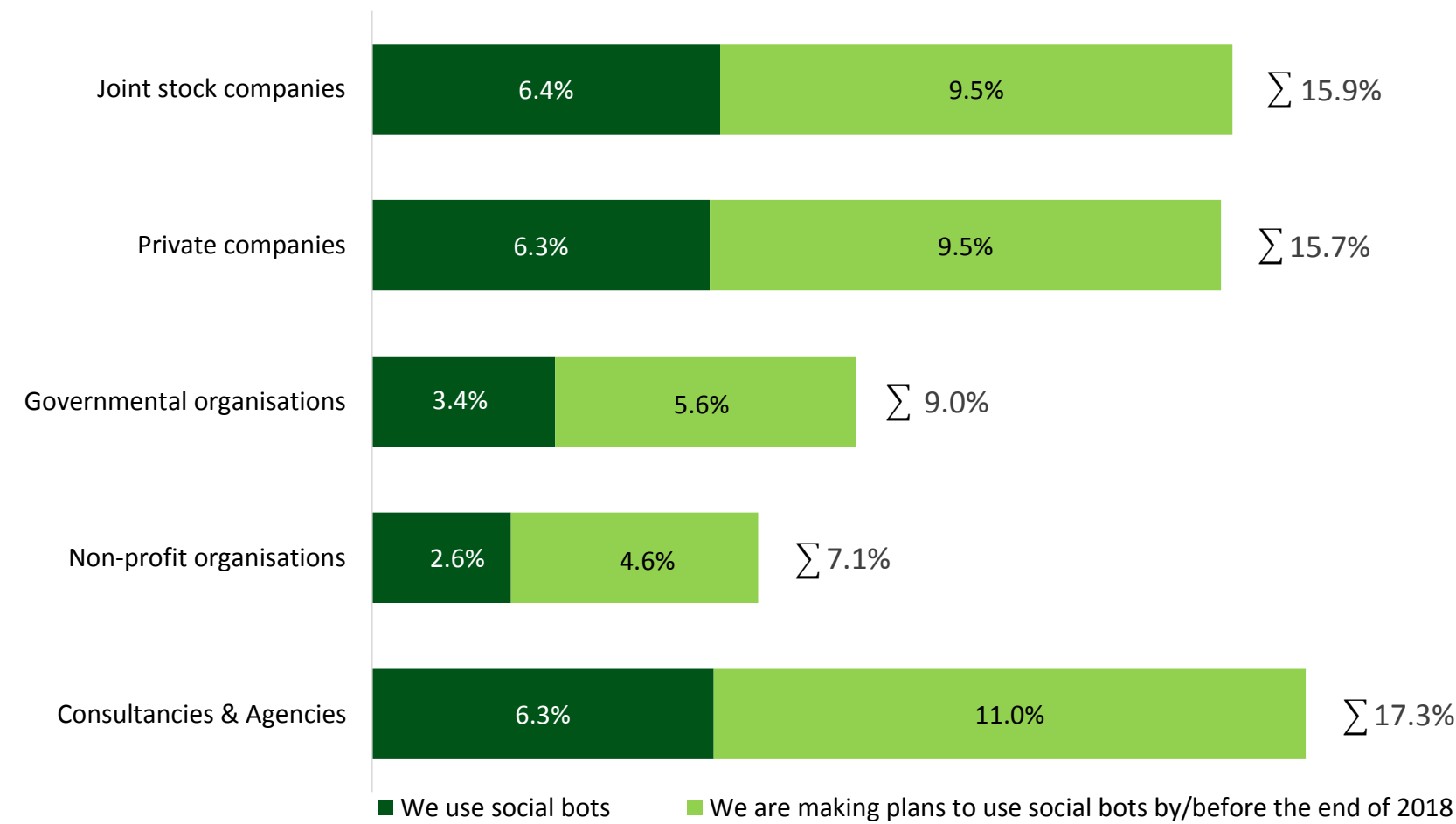
www.communicationmonitor.eu / Zerfass et al. 2017 / n ≥ 2,848 communication professionals. Q 7: Nowadays many social media accounts are run by automated software applications, so-called “social bots”. They are communicating much faster and more intensively than humans – which has stimulated a debate about this phenomenon, e.g., during the recent US presidential campaign and among strategic communication experts. Please rate these statements based on your experience. Scale 1 (Strongly disagree) – 5 (Strongly agree). * Significant differences (independent samples T-Test, $p \leq 0.05$). ** Highly significant differences (independent samples T-Test, $p \leq 0.01$).

Very few organisations use social bots for strategic communication today or plan to use them in the near future

European organisations and their communication practices

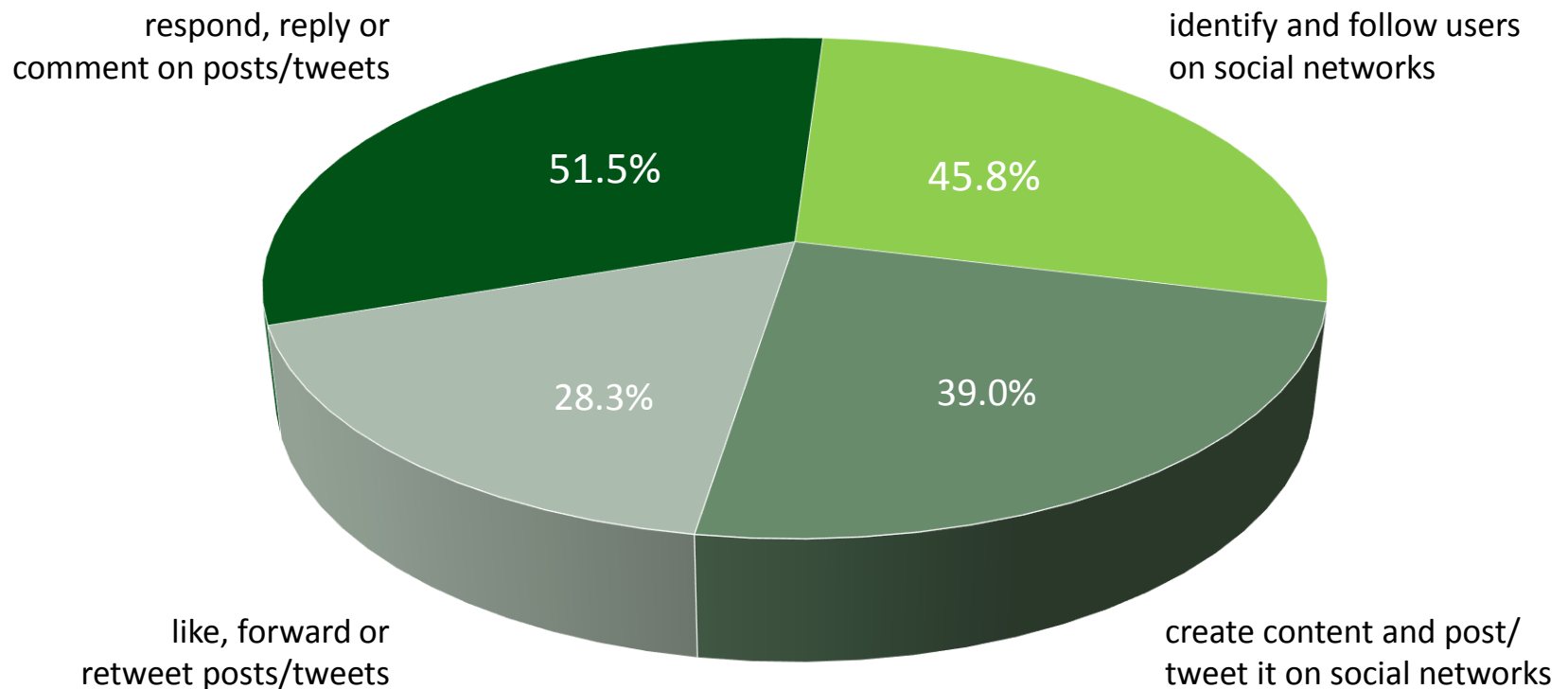


Consultancies, agencies and companies are more open-minded towards the use of social bots

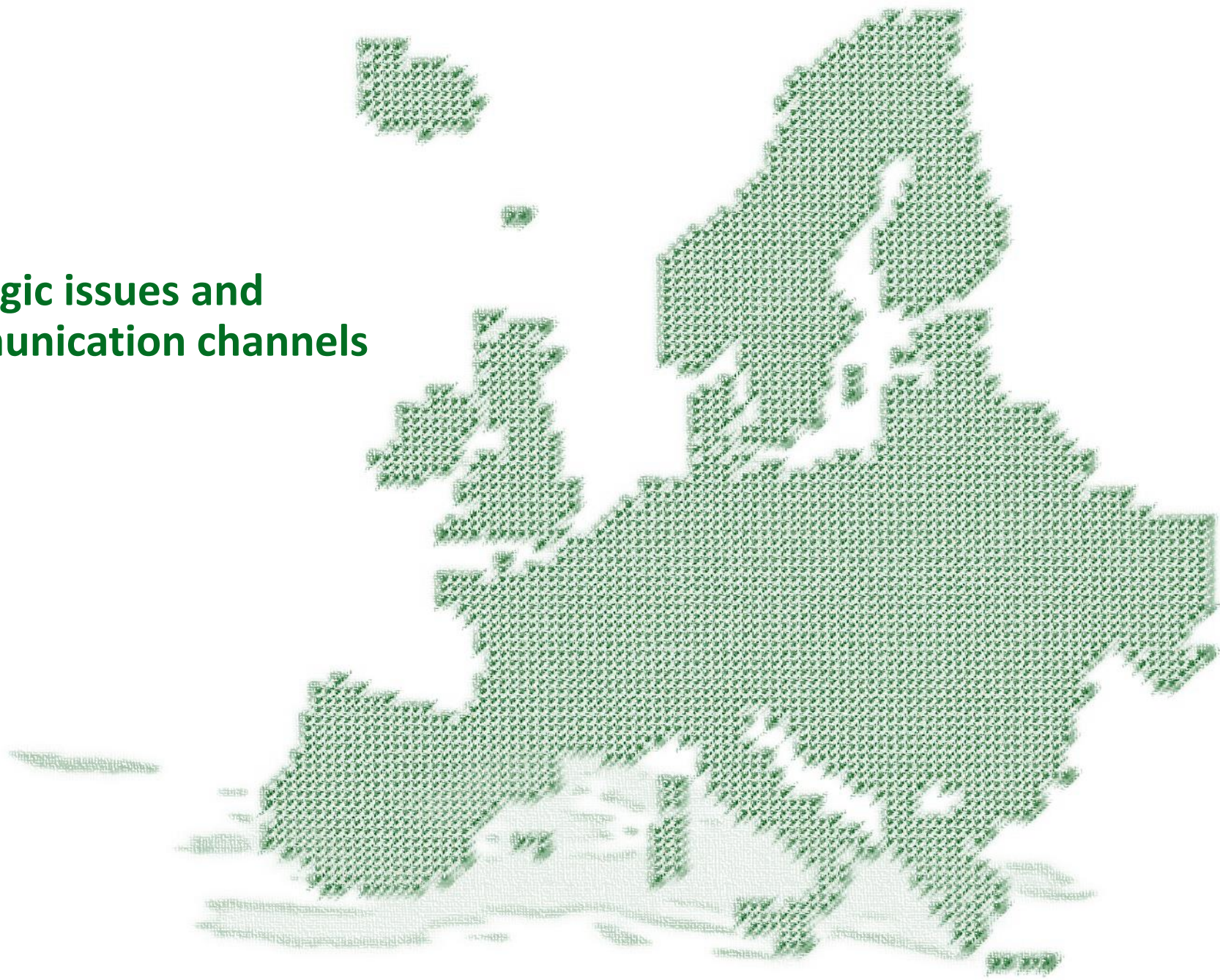


Most communication departments and agencies apply social bots for automated responses or for identifying and following stakeholders on social media

We use/plan to use social bots to automatically ...



Strategic issues and communication channels



Chapter overview

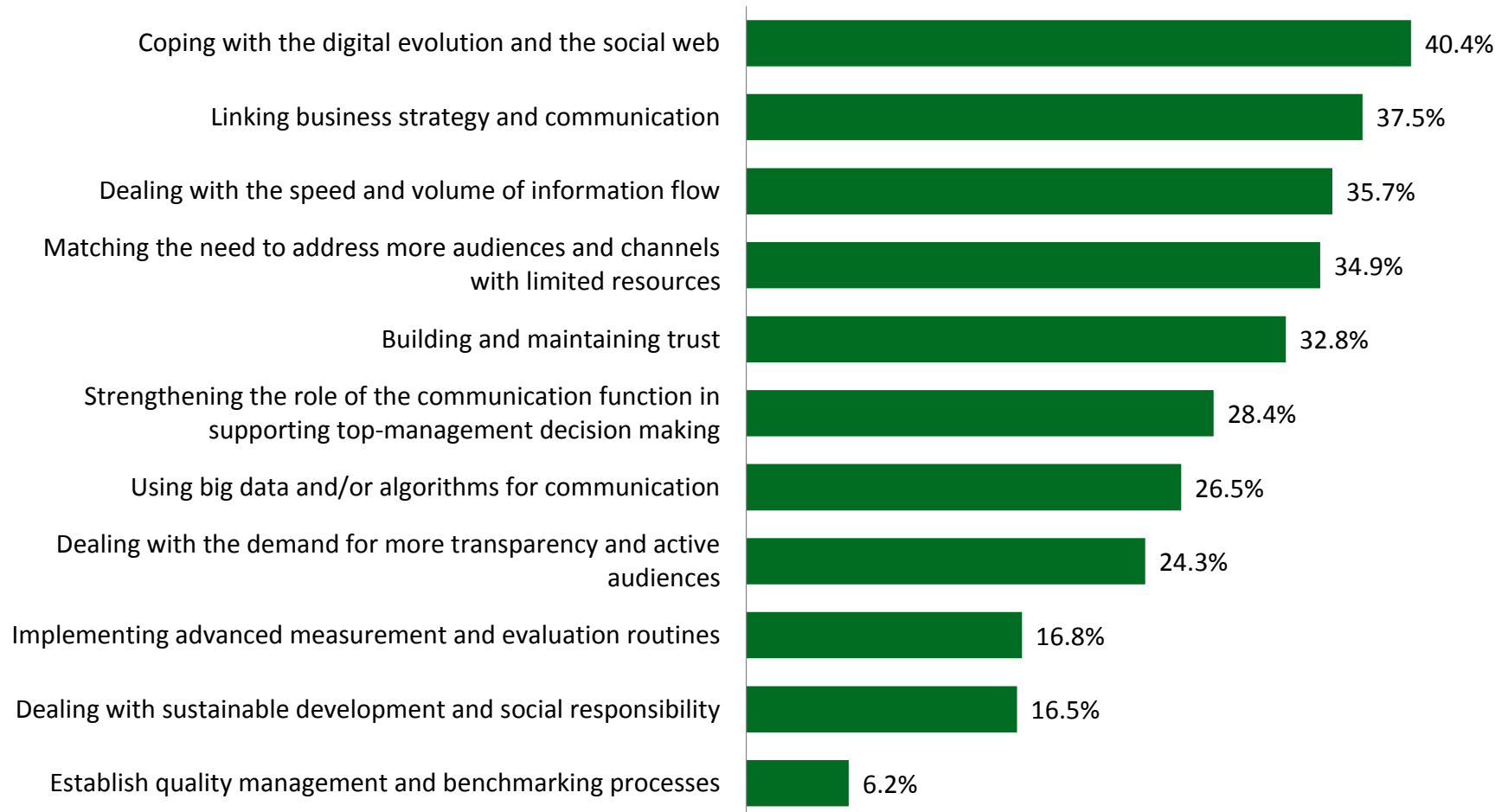
The long-term development of strategic issues for communication management in Europe consistently shows two main issues at the top of the list: linking business strategy and communication, coping with the digital evolution and the social web. This year coping with digitalisation and social media is considered the most important issue (40.4 per cent) and trades places with linking communication to business (37.5 per cent). For the coming three years dealing with the ever-growing information flow, the need to address ever more audiences as well as building and maintaining trust are expected to be important issues by one third of the respondents. Interestingly trust is mentioned more often than one year ago, while strengthening communications' abilities to support top-management is prioritised by fewer communicators.

This year's results show differences in the assessment of strategic issues between different countries and European regions. Longitudinal analysis between 2007 and 2016 showed the rise of the national and regional differences over the years. In 2007 no significant differences in assessing strategic issues were found between the European countries. In 2016 the four most important issues showed significant varied patterns of importance across European countries. This development indicates a stronger influence of national culture on the perception of issues for the field (Verhoeven et al., 2017).

A similar rising cultural effect was found for the perceived importance of key communication channels and instruments for strategic communication. Social media and collaboration with print or audiovisual media outlets differs significantly between key countries. The mediatisation of societies (Ihlen & Pallas, 2015) is clearly influenced by national cultural characteristics. Across Europe, social media and social networks are considered by far (90.4 per cent) to be the most important channel to address stakeholders, gatekeepers and audiences. Other online communication comes second (83.1 per cent), followed by press and media relations with online newspapers and magazines (82.4 per cent). Longitudinal analysis shows by the way that the expected shift from traditional media relations towards online and mobile media is consistently overestimated. The perceived importance of owned media (e.g., customer and employee magazines) has also not gone down as expected in previous reports; owned media are still considered to maintain their importance in the future, just like events.

Does this mean that social media will be the only relevant channel for strategic communication in the future? That is not the case. Despite differences between the popularity of various channels and instruments, the past decade has shown a great convergence of media importance and use in Europe. All media are important for addressing stakeholders and gatekeepers. They constitute a bundle of convergent media that are all used by professionals. This situation is very different compared to 2007. In those days the different types of media were clearly separated. In the past decade the importance of social media clearly increased but the traditional media relations with journalists remain important (see also Tench et al., 2017). This is in line with literature stating that new and social media technology should complement, not replace, traditional channels. Strategic selection must be done related to the richness of media and the capacity of control for building successful relationships (Ledford, 2012).

Most important strategic issues for communication management until 2020



Perceived relevance of strategic issues in Western and Northern Europe

	Coping with the digital evolution and the social web	Linking business strategy and communication	Dealing with the speed and volume of information flow	Matching the need to address more audiences and channels with limited resources	Building and maintaining trust	Strengthening the role of the communication function in supporting top-management decision making	Using big data and/or algorithms for communication
Germany	44.3%	36.8%	42.7%	41.5%	31.2%	27.3%	27.7%
Austria	51.6%	34.4%	48.4%	37.5%	29.7%	31.3%	29.7%
Switzerland	44.1%	35.8%	37.3%	45.6%	34.3%	26.0%	20.6%
France	42.5%	35.8%	34.2%	35.8%	34.2%	27.5%	25.8%
Belgium	42.1%	30.1%	41.7%	35.6%	33.3%	27.3%	27.3%
Netherlands	28.0%	36.5%	31.7%	27.0%	42.3%	34.4%	22.8%
United Kingdom	40.3%	49.9%	27.9%	39.7%	31.0%	32.4%	18.9%
Ireland	40.6%	50.0%	34.9%	31.1%	28.3%	35.8%	21.7%
Sweden	42.1%	30.6%	25.6%	34.7%	35.5%	37.2%	22.3%
Norway	39.6%	40.7%	25.3%	36.3%	37.4%	25.3%	28.6%
Finland	36.3%	37.4%	33.0%	39.7%	30.2%	29.1%	20.1%

www.communicationmonitor.eu / Zerfass et al. 2017 / n = 2,936 communication professionals from 20 countries. Q 5: Which issues will be most important for communication management / PR within the next three years from your point of view? Please pick exactly 3 items.

Percentages: Frequency based on selection as Top-3 issue.

Perceived relevance of strategic issues in Southern and Eastern Europe

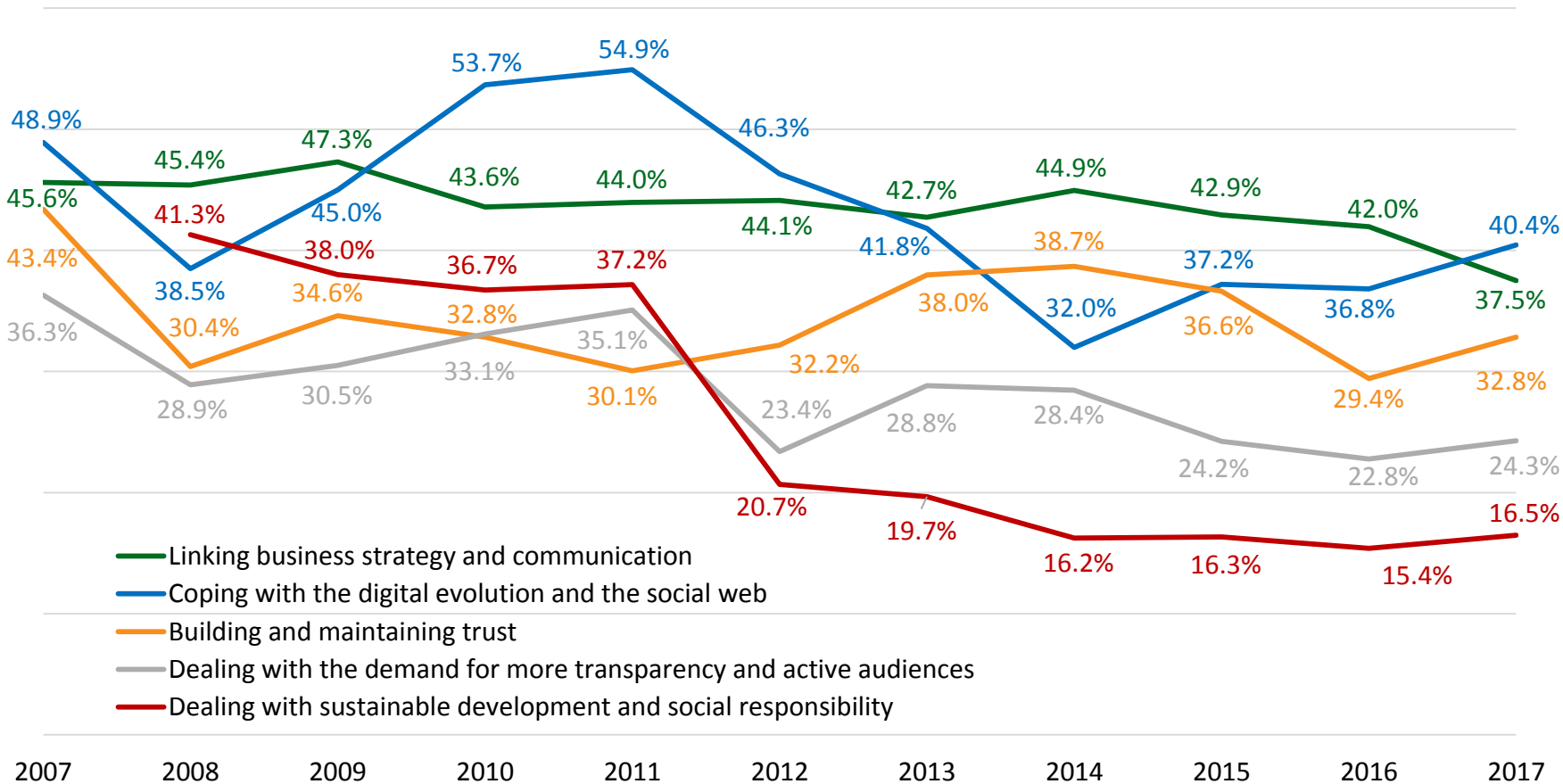
	Coping with the digital evolution and the social web	Linking business strategy and communication	Dealing with the speed and volume of information flow	Matching the need to address more audiences and channels with limited resources	Building and maintaining trust	Strengthening the role of the communication function in supporting top-management decision making	Using big data and/or algorithms for communication
Spain	25.6%	39.7%	26.4%	28.9%	29.8%	33.9%	38.8%
Italy	40.6%	42.2%	24.4%	36.1%	23.9%	30.0%	30.6%
Slovenia	42.1%	35.1%	35.1%	31.6%	42.1%	34.2%	20.2%
Croatia	41.7%	29.6%	38.9%	36.1%	25.0%	28.7%	23.1%
Serbia	54.1%	35.3%	30.6%	32.9%	37.6%	22.4%	24.7%
Turkey	43.3%	35.8%	35.8%	29.9%	25.4%	25.4%	43.3%
Poland	44.1%	35.3%	50.0%	32.4%	38.2%	27.9%	30.9%
Czech Republic	48.0%	26.0%	54.5%	31.7%	31.7%	17.9%	34.1%
Romania	39.0%	33.1%	43.6%	23.3%	40.7%	16.9%	27.3%

www.communicationmonitor.eu / Zeffass et al. 2017 / n = 2,936 communication professionals from 20 countries. Q 5: Which issues will be most important for communication management / PR within the next three years from your point of view? Please pick exactly 3 items.

Percentages: Frequency based on selection as Top-3 issue.

Long-term development of strategic issues for communication management in Europe since 2007

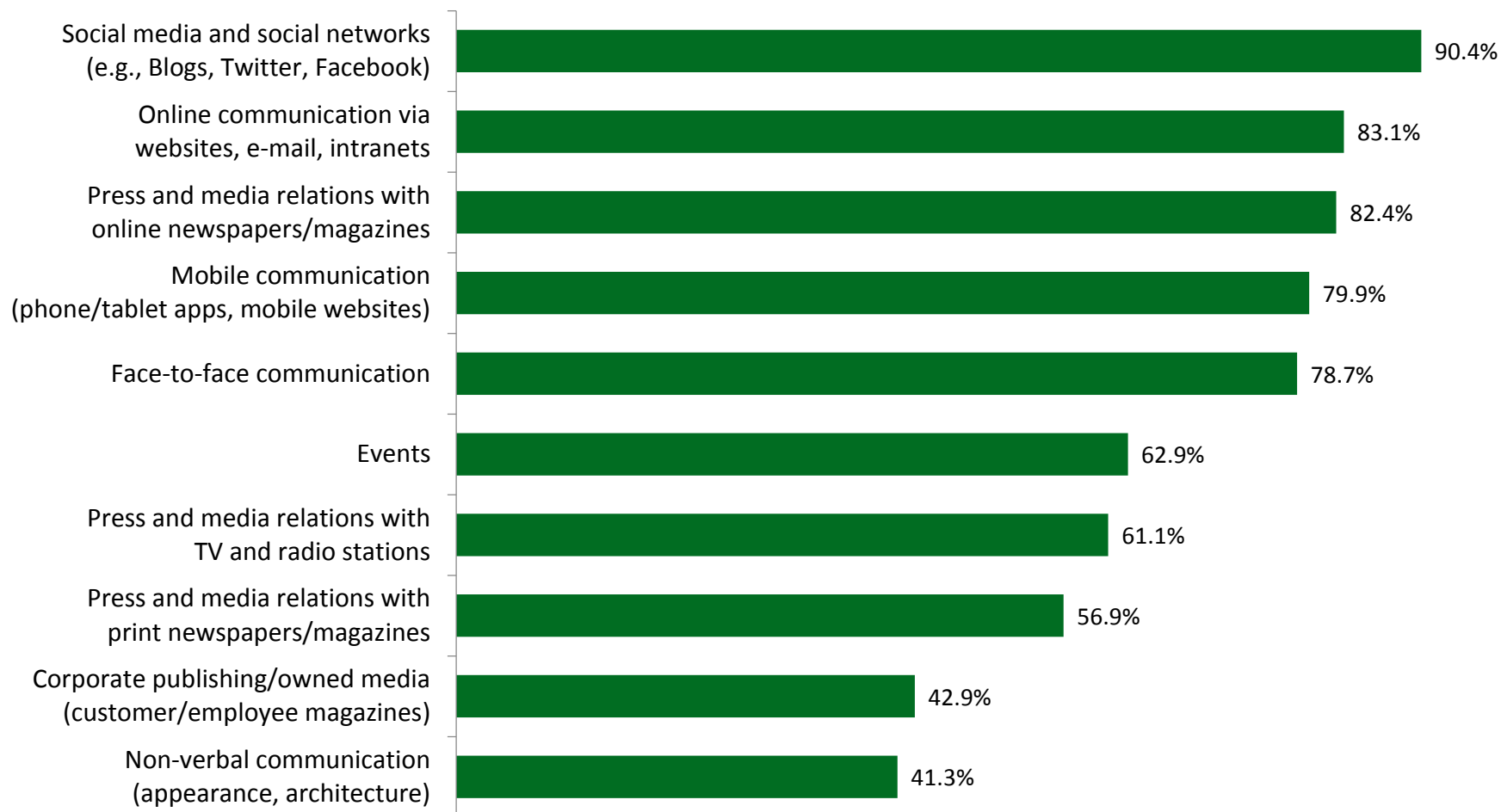
Strategic issues perceived as most important



www.communicationmonitor.eu / Zerfass et al. 2017 / n = 3,387 communication professionals (Q 5); Zerfass et al. 2016 / n = 2,710 (Q 9); Zerfass et al. 2015 / n = 2,253 (Q 5); Zerfass et al. 2014 / n = 2,777 (Q 16); Zerfass et al. 2013 / n = 2,710 (Q 6); Zerfass et al. 2012 / n = 2,185 (Q 9); Zerfass et al. 2011 / n = 2,209 (Q 6); Zerfass et al. 2010 / n = 1,955 (Q 7); Zerfass et al. 2009 / n = 1,863 (Q 12); Zerfass et al. 2008 / n = 1,524 (Q 6); Zerfass et al. 2007 / n = 1,087 (Q 6).
Q: Which issues will be most important for communication management / PR within the next three years from your point of view? Please pick exactly 3 items.
Percentages: Frequency based on selection as Top-3 issue. Longitudinal evaluation based on 24,660 responses from European communication professionals.

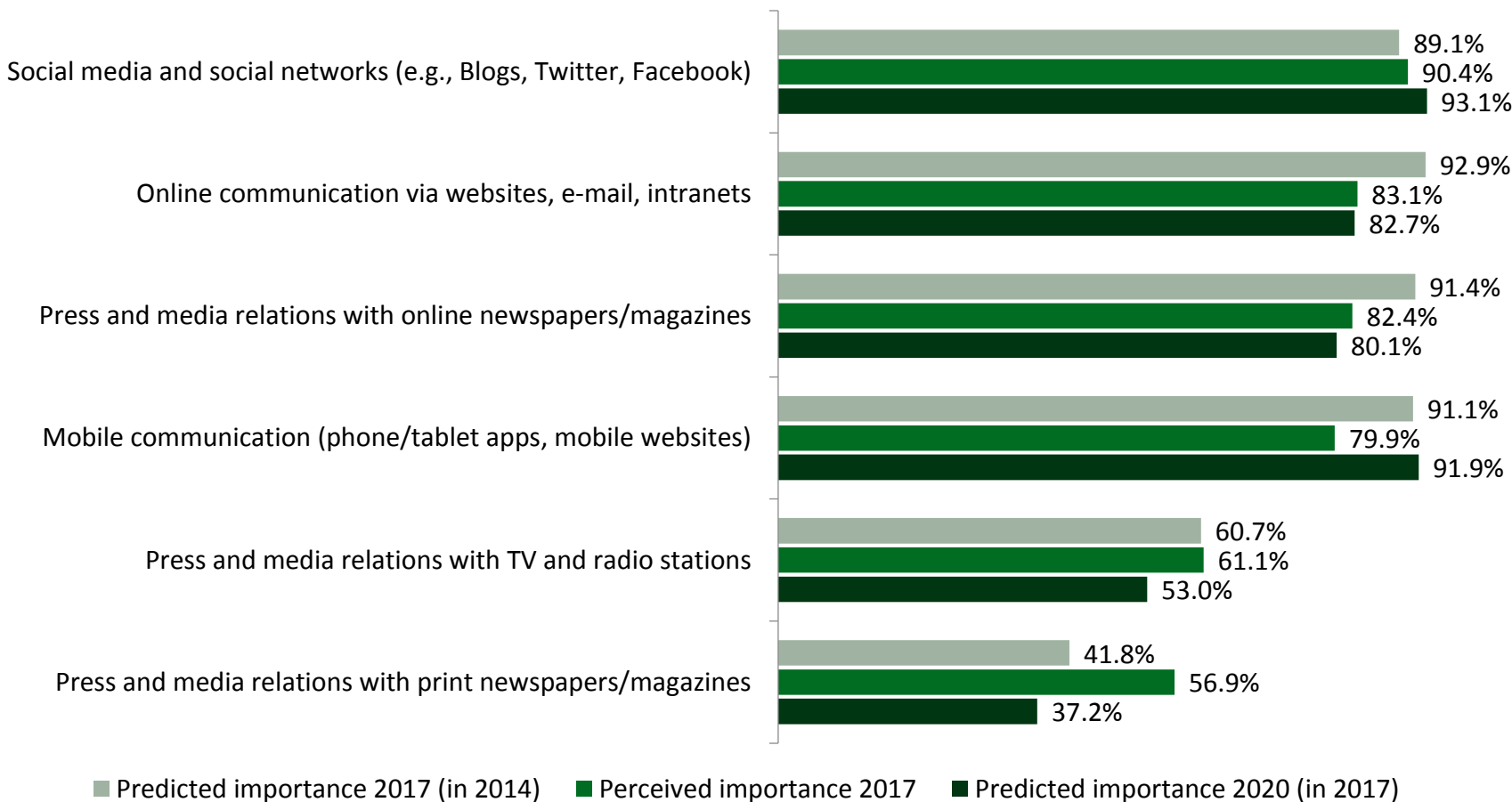
Importance of strategic communication channels/instruments in Europe

Perceived importance for addressing stakeholders, gatekeepers and audiences today



Longitudinal analyses show an overestimation of the shift towards online and mobile, while print media relations are still stronger than expected

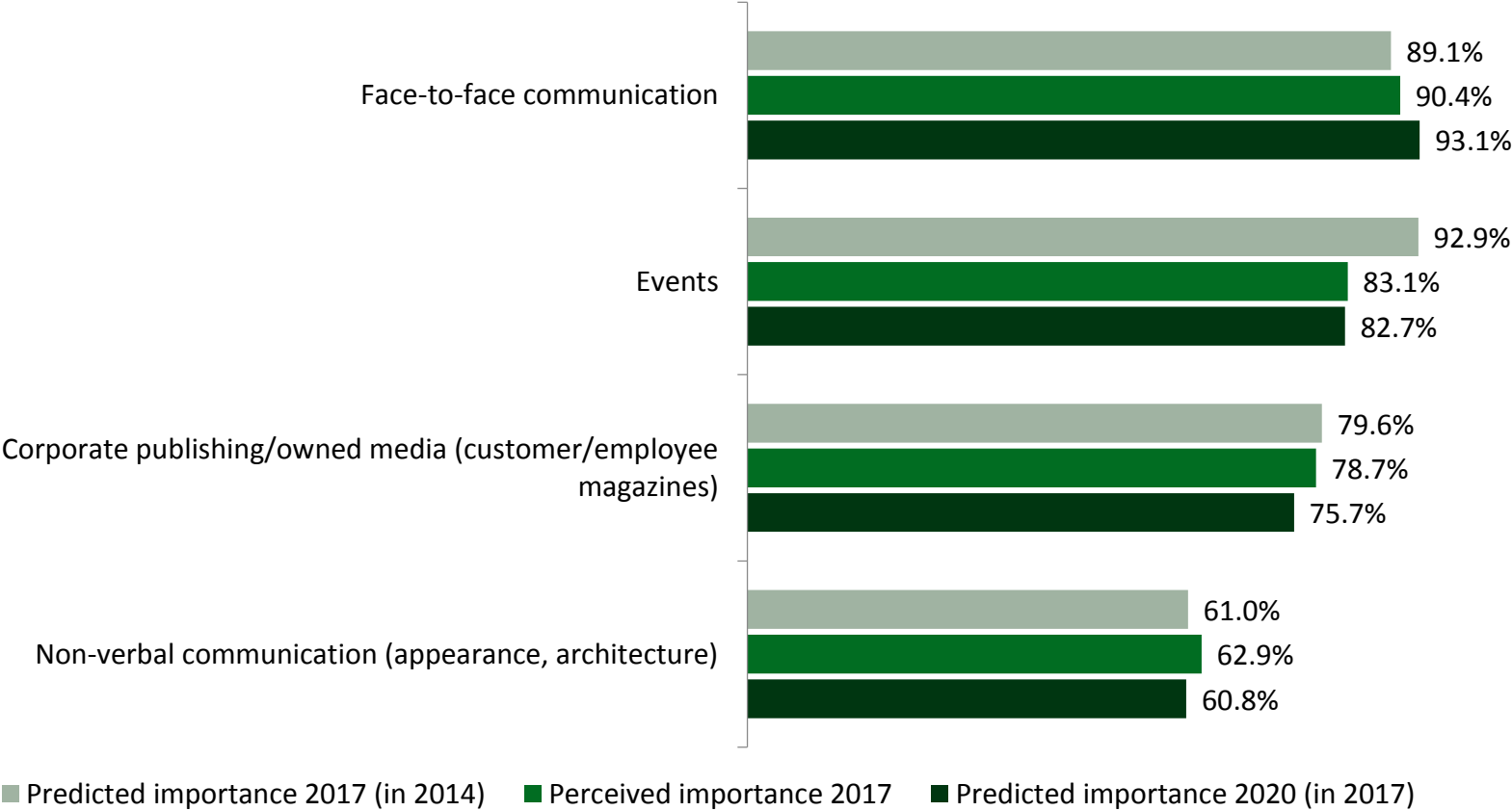
Perceived importance for addressing stakeholders, gatekeepers and audiences today in 2014, 2017 and 2020



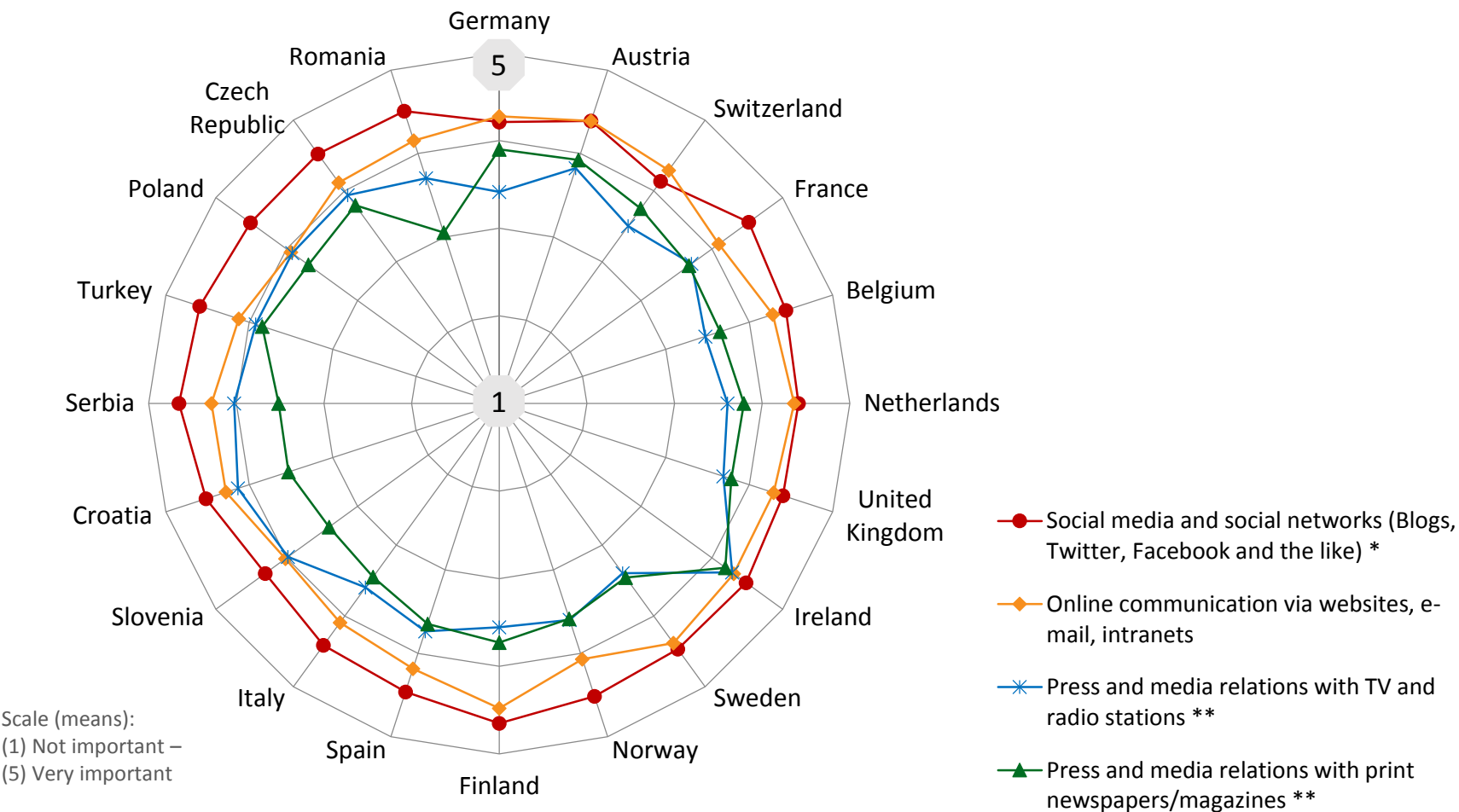
www.communicationmonitor.eu / Zerfass et al. 2017 / n ≥ 3,239 communication professionals; Zerfass et al. 2014 / n ≥ 2,631 (Q 24). Q 6: How important are the following methods in addressing stakeholders, gatekeepers and audiences today? In your opinion, how important will they be in three years? Scale 1 (Not important) – 5 (Very important). Percentages: Frequency based on scale points 4-5.

Importance of owned media did not go down as expected – predictions and perceptions for face-to-face communication and events are quite stable

Perceived importance for addressing stakeholders, gatekeepers and audiences in 2014, 2017 and 2020



Perceived importance of key communication channels across Europe today



Companies and agencies express a significantly higher belief in the relevance of owned media today and in the future

Perceived importance in various types of organisations

	Joint stock companies		Private companies		Governmental organisations		Non-profit organisations		Consultancies & Agencies	
	2017	2020	2017	2020	2017	2020	2017	2020	2017	2020
Press and media relations with print newspapers/magazines	57.9% *	39.0% *	50.3% *	32.8% *	60.0% *	38.8% *	59.3% *	35.3% *	58.5% *	39.2% *
Press and media relations with online newspapers/magazines	84.1%	82.4%	80.4%	77.6%	81.4%	80.8%	84.7%	80.9%	82.1%	79.6%
Press and media relations with TV and radio stations	57.0% **	49.3% **	51.6% **	46.3% **	70.6% **	62.3% **	59.7% **	51.5% **	67.5% **	56.8% **
Corporate publishing/owned media (customer/employee magazines)	44.7% **	45.3% *	46.4% **	44.5% *	34.9% **	37.4% *	40.5% **	37.4% *	44.6% **	47.0% *
Online communication via websites, e-mail, intranets	82.5%	83.2%	85.7%	85.8%	85.6%	83.7%	90.6%	87.1%	76.2%	76.9%
Social media and social networks (Blogs, Twitter, Facebook and the like)	87.6%	93.1%	90.7%	92.7%	91.4%	95.7%	94.3%	94.2%	89.8%	91.2%
Mobile communication (phone/tablet apps, mobile websites)	77.9%	92.5%	82.1%	93.0%	80.4%	92.1%	82.4%	92.4%	78.0%	90.2%
Events	64.2%	60.8% **	65.2%	62.7% **	60.4%	61.0% **	72.6%	70.0% **	56.4%	54.2% **
Face-to-face communication	81.3%	76.8%	78.9%	76.3%	77.2%	74.5%	80.9%	76.6%	76.2%	74.5%
Non-verbal communication (appearance, architecture)	42.3% **	45.4% *	43.9% **	49.2% *	37.3% **	45.2% *	42.7% **	45.9% *	39.9% **	47.0% *

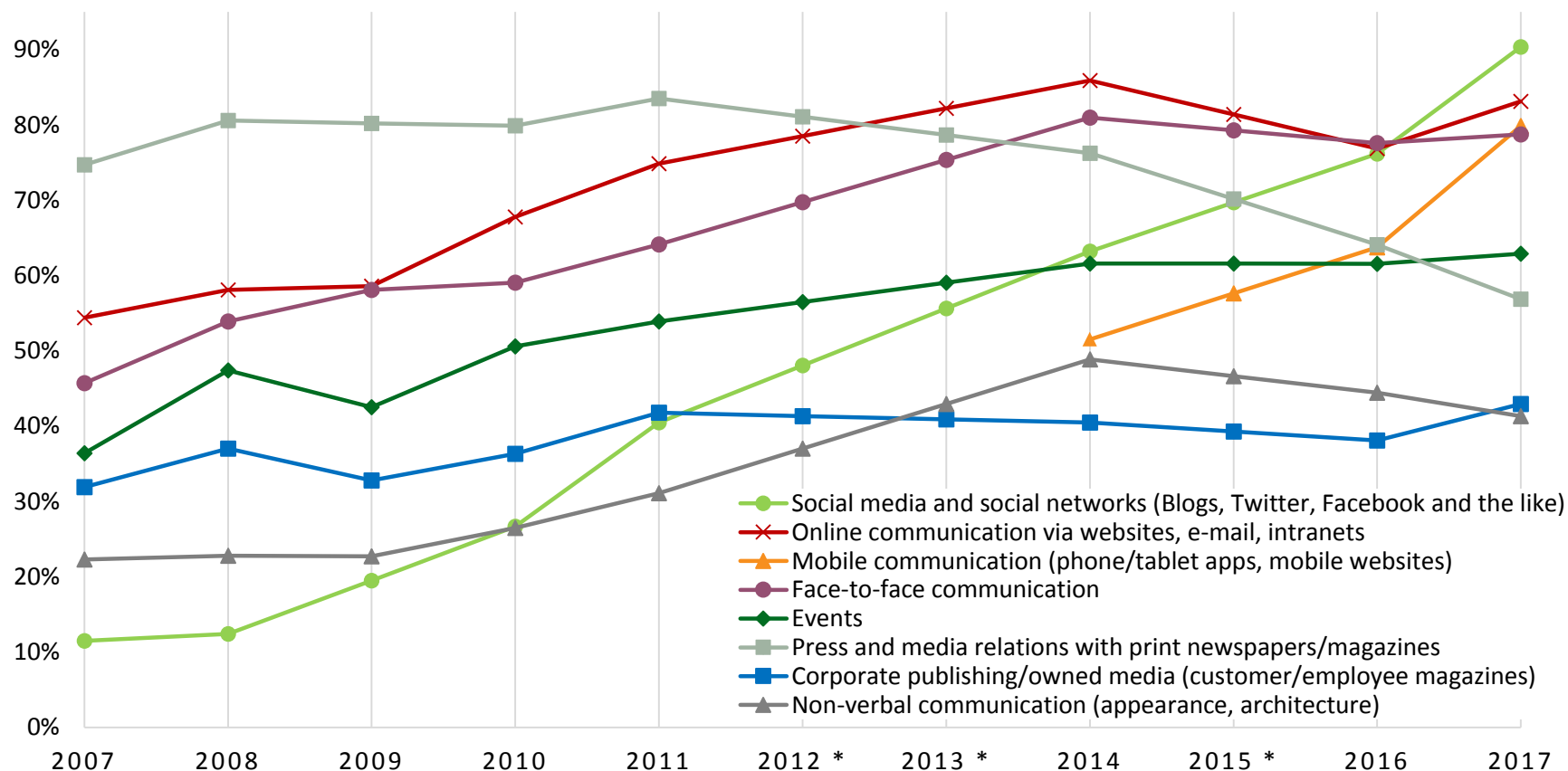
www.communicationmonitor.eu / Zerfass et al. 2017 / n = 3,268 communication professionals. Q 12: How important are the following methods in addressing stakeholders, gatekeepers and audiences today? In your opinion, how important will they be in three years? Scales 1 (Not important) – 5 (Very important).

Percentages: Frequency based on scale points 4-5. * Significant differences for the relevant year (chi-square test, $p \leq 0.05$).

** Highly significant differences for the relevant year (chi-square test, $p \leq 0.01$).

Changing relevance and convergence of communication channels since 2007

Perceived importance for addressing stakeholders, gatekeepers and audiences



www.communicationmonitor.eu / Zeffass et al. 2017 / n = 3,268 communication professionals; Zeffass et al. 2016 / n = 2,583 (Q 12); Zeffass et al. 2014 / n = 2,666 (Q 24); Zeffass et al. 2011 / n = 2,125 (Q 11); Zeffass et al. 2010 / n = 1,900 (Q 6); Zeffass et al. 2009 / n = 1,806 (Q 5); Zeffass et al. 2008 / n = 1,542 (Q 3); Zeffass et al. 2007 / n = 1,087 (Q 4). Q 6: How important are the following methods in addressing stakeholders, gatekeepers and audiences today? Scale 1 (Not important) – 5 (Very important). Percentages: Frequency based on scale points 4-5. * No data collected in these years; figure shows extrapolated values. Longitudinal evaluation based on 16,976 responses from European communication professionals.

Hypermodernity and its consequences for communications



Chapter overview

In today's global society organisations are expected to continuously reflect on their behaviour, the role they play for their stakeholders and society at large and their environment (Roberts & Armitage, 2006). Communication professionals are helping organisations to adapt to the changing circumstances that they face constantly (Tench et al., 2017). Theoretically the current global society can be labelled as a hyper-modern society. Hypermodernity is a concept introduced by the French social theorist Gilles Lipovetsky (2005), who differentiates it from modernity (based on rationality and division of labour as a key source of competitiveness) and postmodernity (characterised by innovativeness and knowledge competition). Virtually nothing is known about how organisations and communication professionals relate to these hypermodern challenges. This study, for the first time, asked European practitioners about aspects of hypermodernity and how this influences their organisation(s) and their work.

A hypermodern society is a society in overdrive, characterised by a culture of hyper consumption, hyper change, and hyper individualism. In a hypermodern culture an increasingly large part of life is characterised by an attitude of consumption; a majority of people have become turbo-consumers also outside the domain of the economy. Continuous change and flexibility are prevalent, and individualisation already known from postmodernity has shifted to hyper narcissism or hyper individualism. For example, everybody is expected to behave responsibly on their own accord in all sectors of life. Hypermodern culture is not straightforward though, it is also full of paradoxes. Organisations, for example, have to be open and flexible and at the same time managing their internal and external environment in order to reach their goals (Rendtorff, 2014; Roberts & Armitage, 2006).

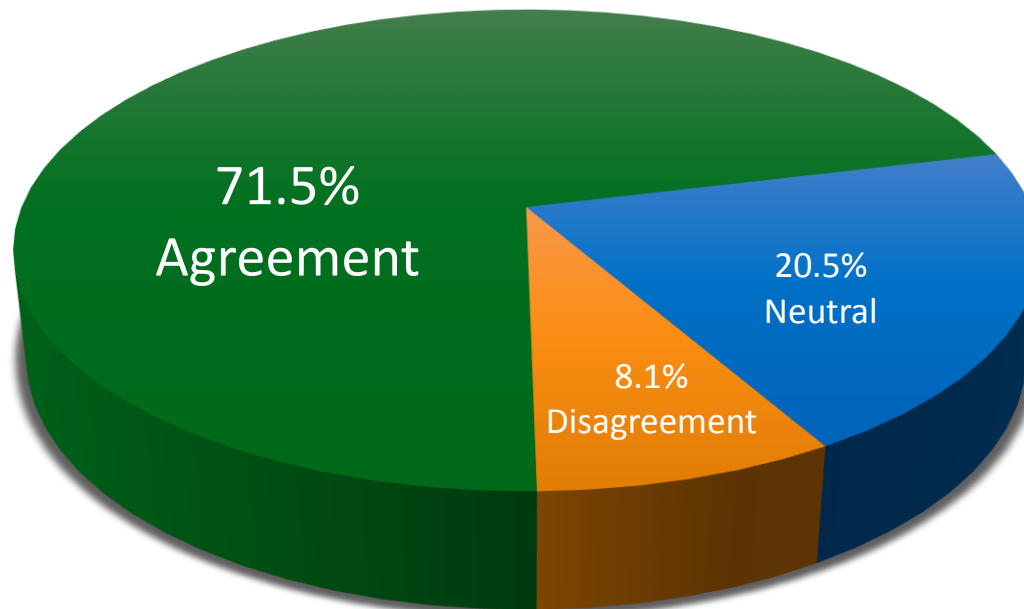
A large majority of 71.5 per cent of the European communication professionals witness the cultural transformation towards a hyper modern culture in their country. It clearly is a transformation in progress. In many organisations characteristics of the modern (early 20th century) and postmodern (late 20th century) way of organising and managing is still recognisable. A cluster analysis shows that 14.4 per cent of the organisations in the sample can be characterised as typically modern with a clear labour division, a stable work force and a rational organisation as key aspects. 42.2 per cent of the organisations are currently transforming from modern to postmodern, with more emphasis on knowledge, information technology, flexible adjustment of the workforce, innovation and an ethics of virtue(s). 43.5 per cent of the organisations are already changing from postmodern to hypermodern with characteristics such as continuous change, decentralised IT, rapid adjustments of the workforce, creativity and ethics of perceived responsibility.

The transition from a postmodern to hypermodern culture is the strongest in consultancies (57.2 per cent) and private companies (51.8 per cent). Organisations with postmodern and hypermodern characteristics are ahead in sensing the trend towards an overarching consumer mentality. Most of them think that it has already changed communication with stakeholders and a large majority thinks that it will change their communication in the next three years.

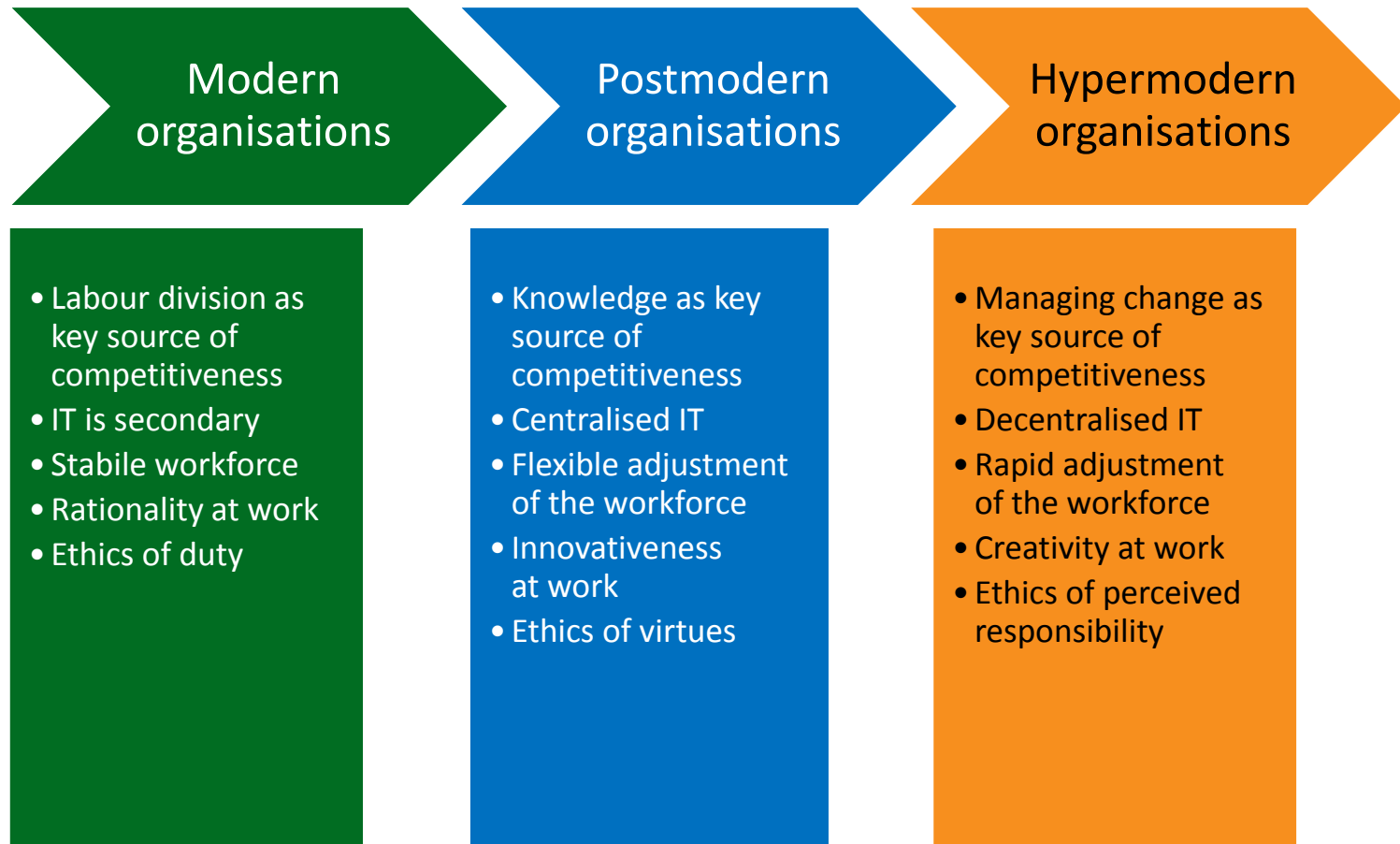
Only a minority of European organisations are actively engaged in public debates about contested topics in society. Active participation in social debates can be considered a necessity in relating to hypermodern publics. Organisations participate most in debates about ecology and climate (44.7 per cent), followed by open borders for business (36.3 per cent) and the future of Europe and the European Union (28.9 per cent). Engagement in societal debates differs significantly between countries.

European communication professionals witness a cultural transformation towards hypermodernity

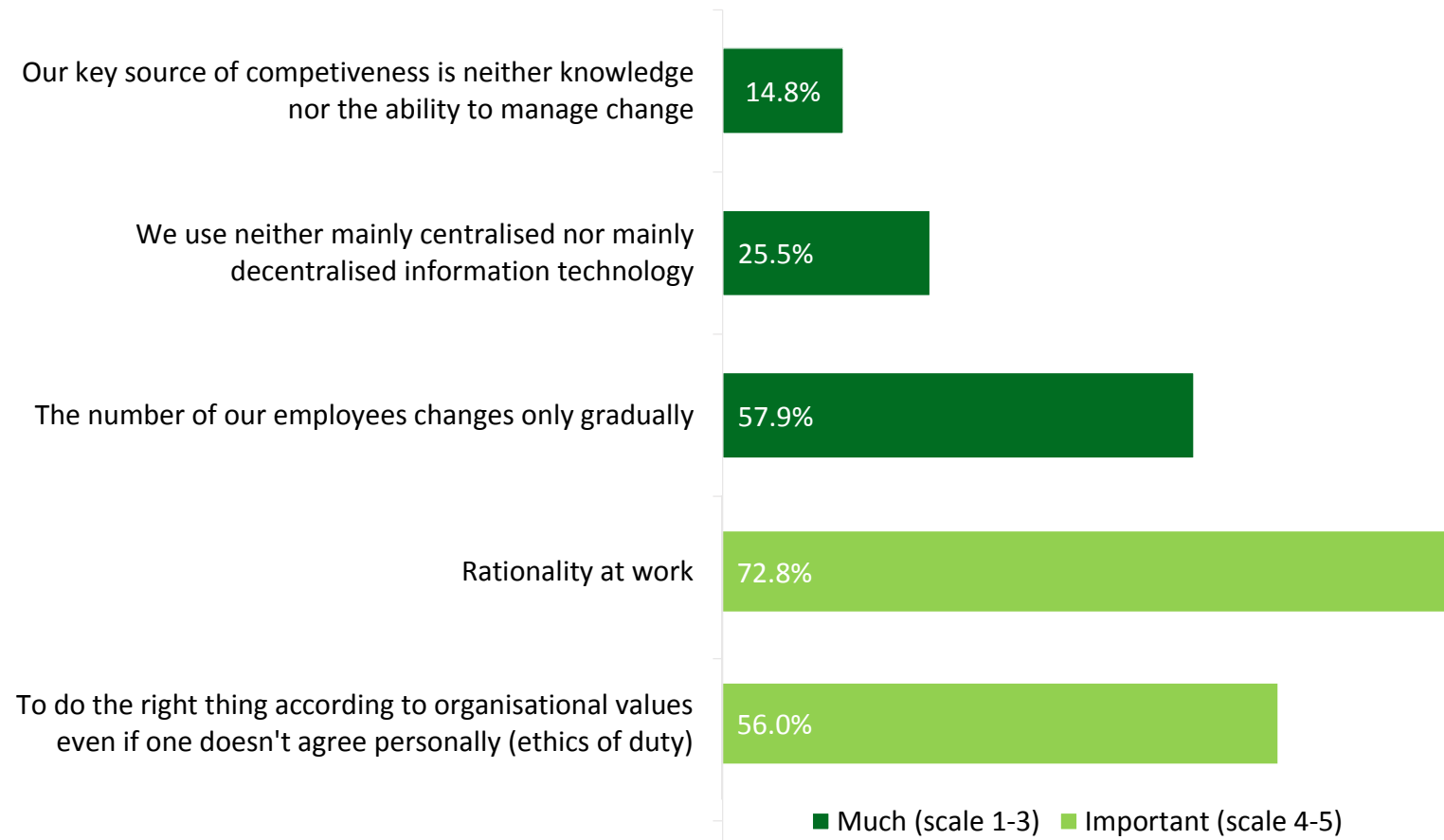
Hypermodernity (a growing consumer mentality in all areas of society) is clearly observable in the culture of my country



Differences between modern, postmodern and hypermodern organisations

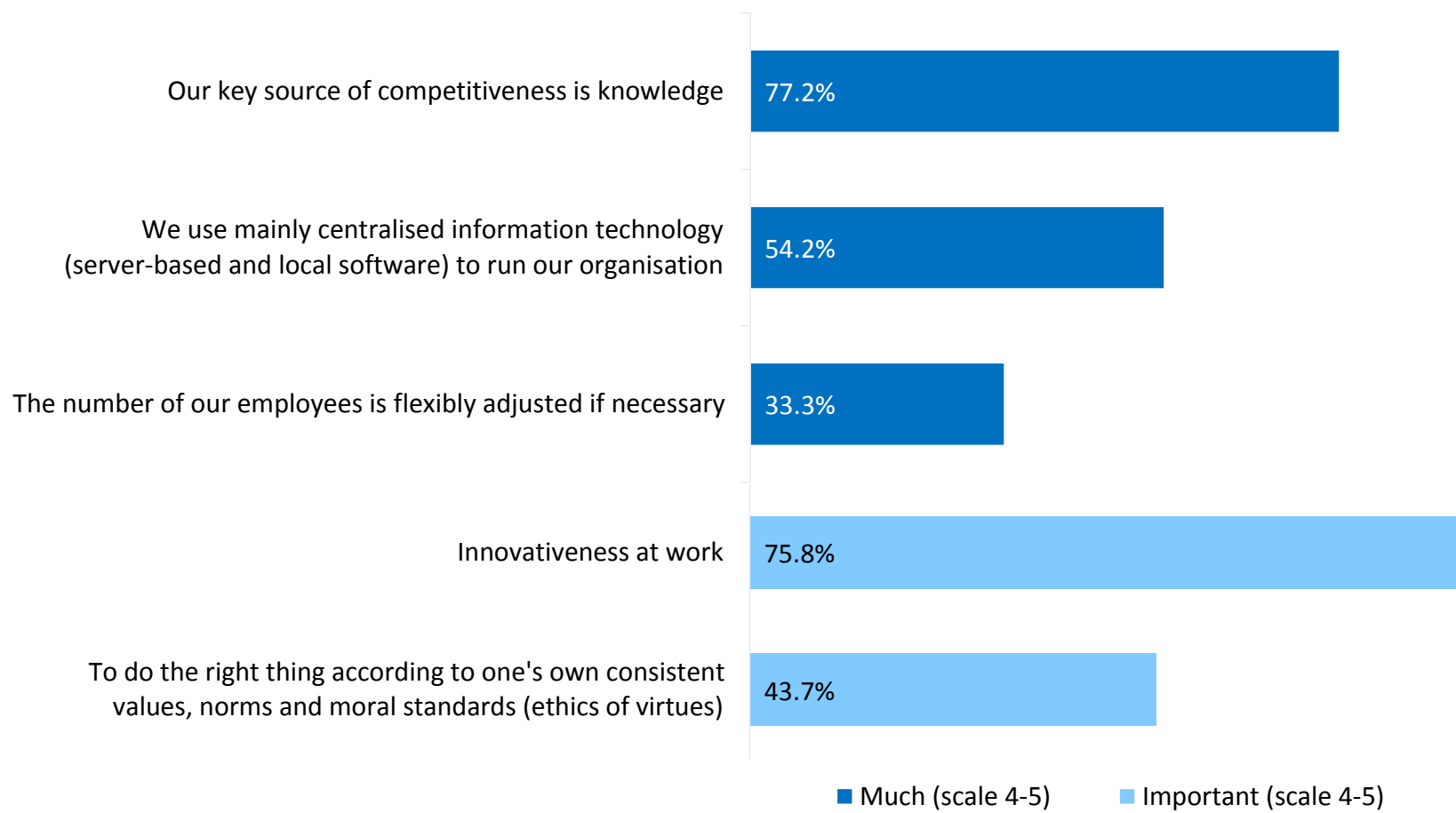


Prevalence of modern attributes in European organisations

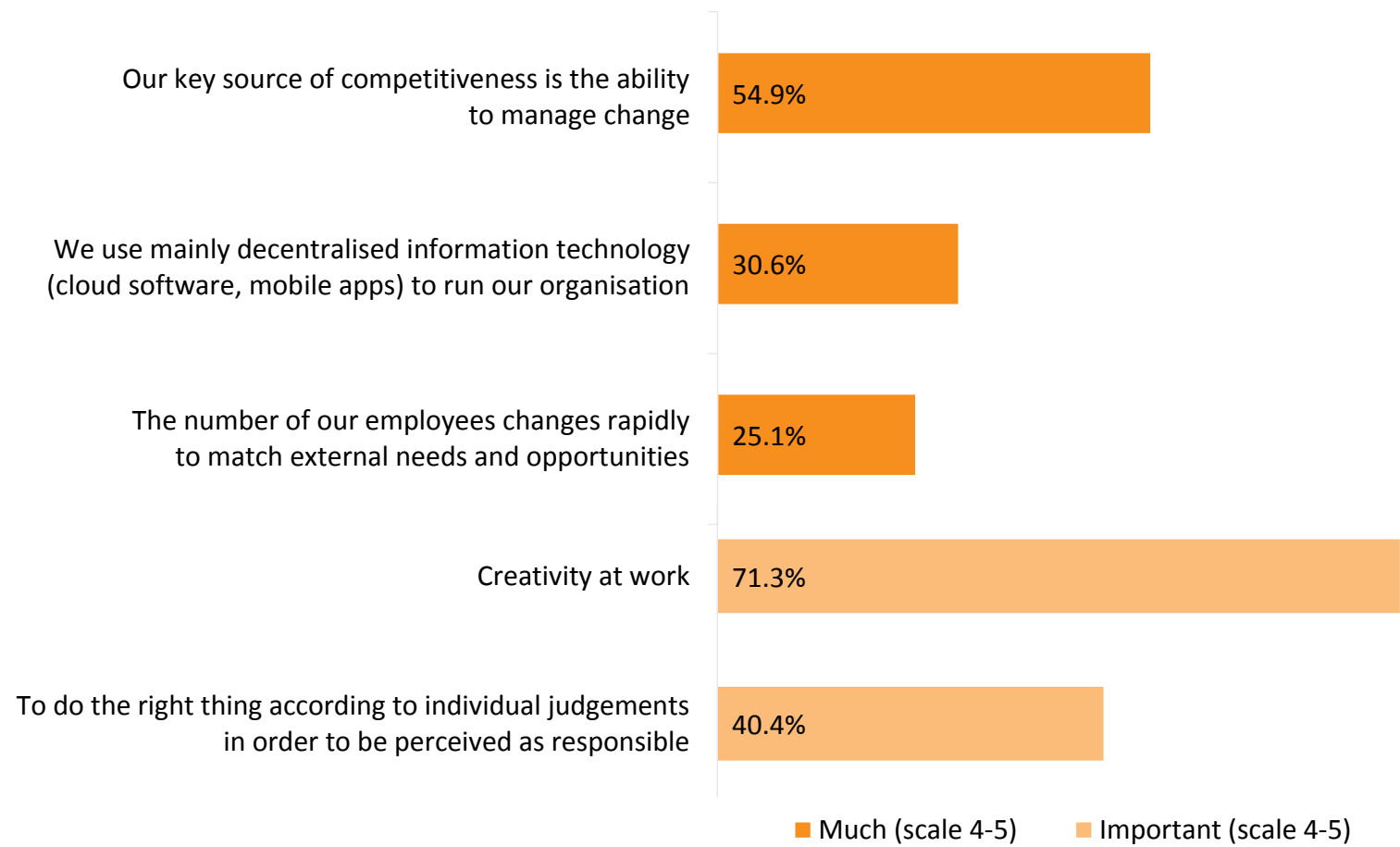


www.communicationmonitor.eu / Zerfass et al. 2017 / n = 3,387 communication professionals. Q 10: To what extent do the following characteristics apply to your organisation? Scale 1 (Not at all)– 5 (Very much). Percentages: Frequency based on reciprocal interpretation of items and scale points 1-3. Q 11: How important are the following characteristics within the culture of your organisation? Scale 1 (Not important at all)– 5 (Very important). Percentages: Frequency based on scale points 4-5.

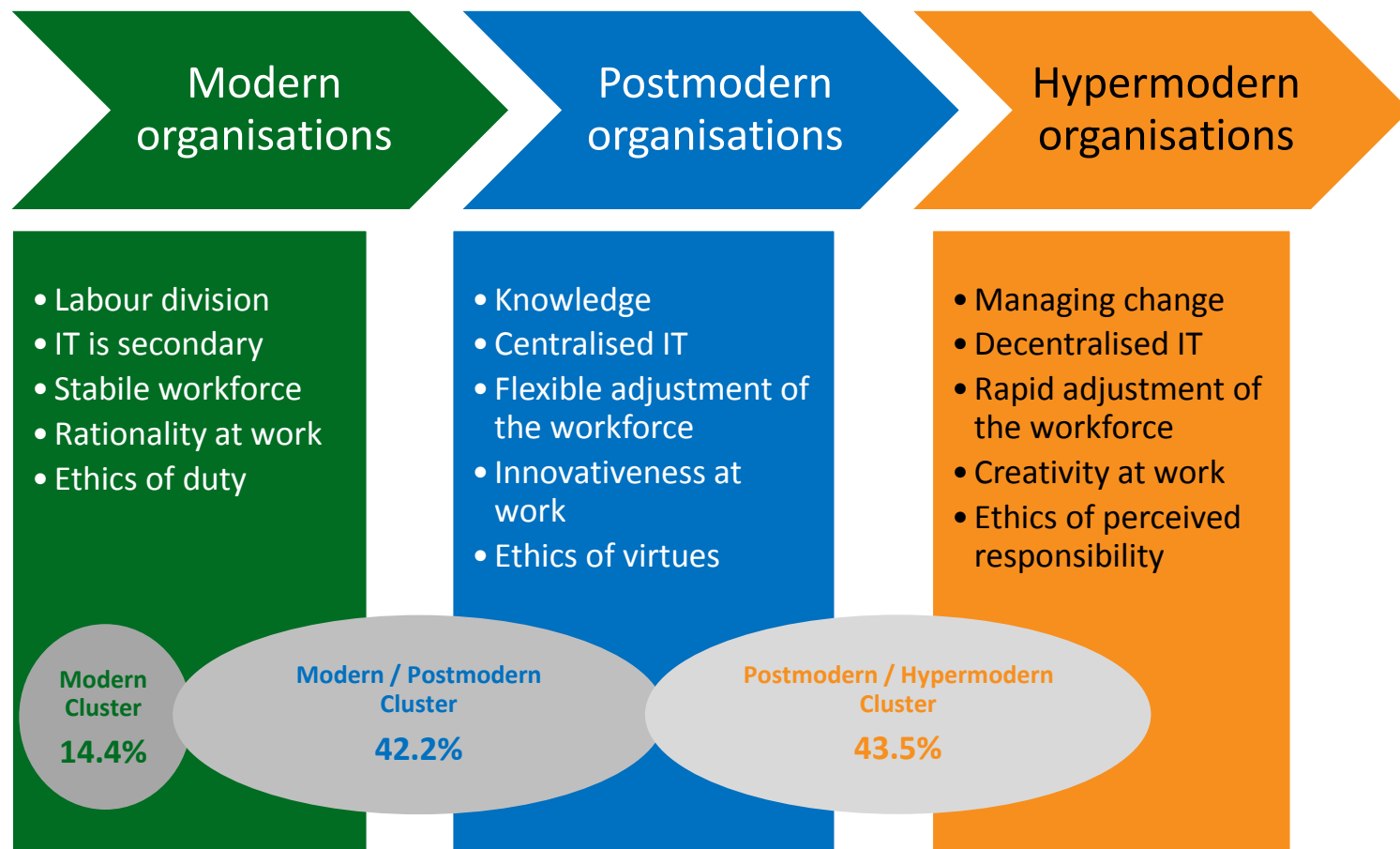
Prevalence of postmodern attributes in European organisations



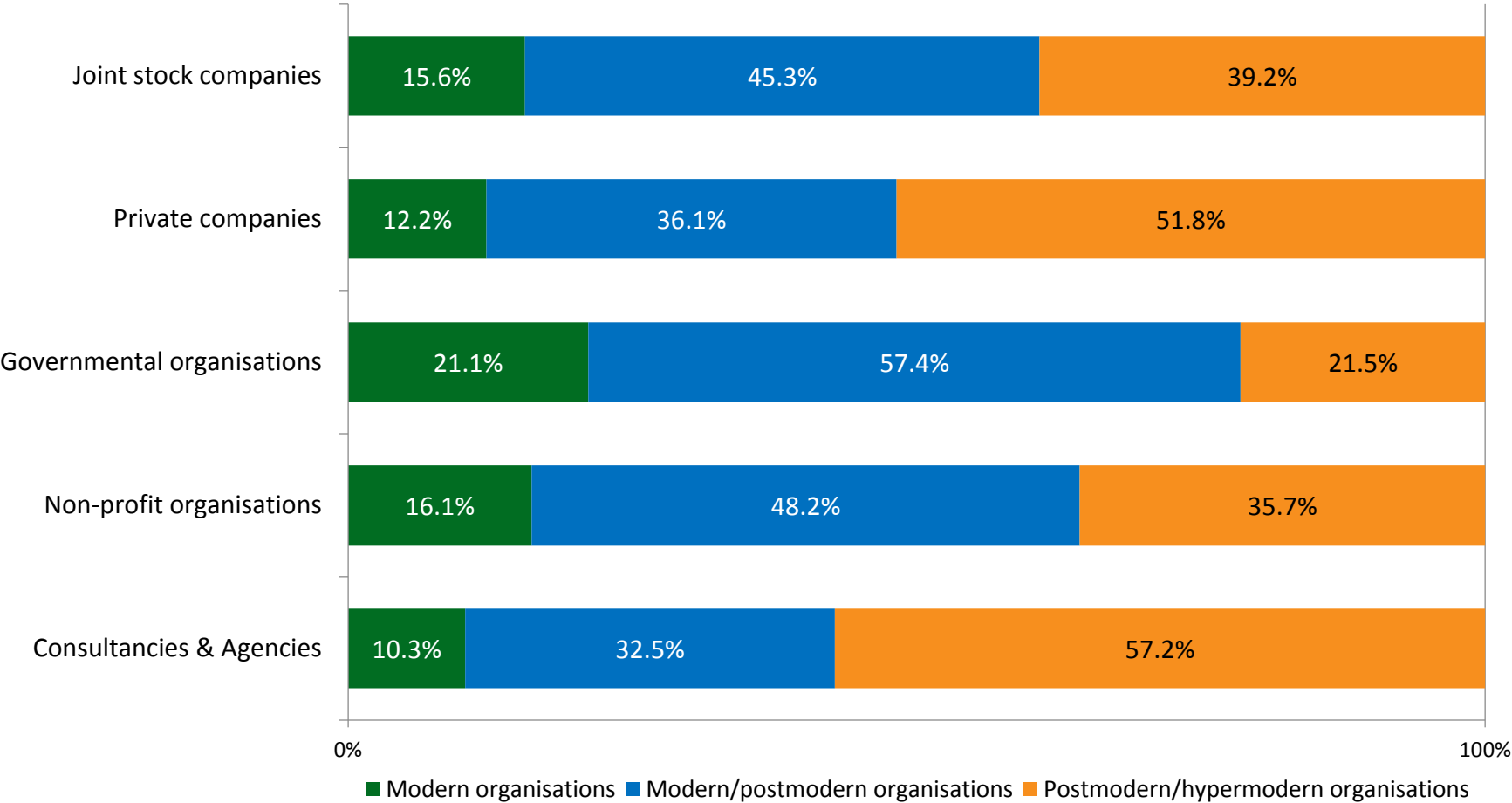
Prevalence of hypermodern attributes in European organisations



Statistical analysis identifies three different clusters of organisations with modern, modern/postmodern and postmodern/hypermodern attributes



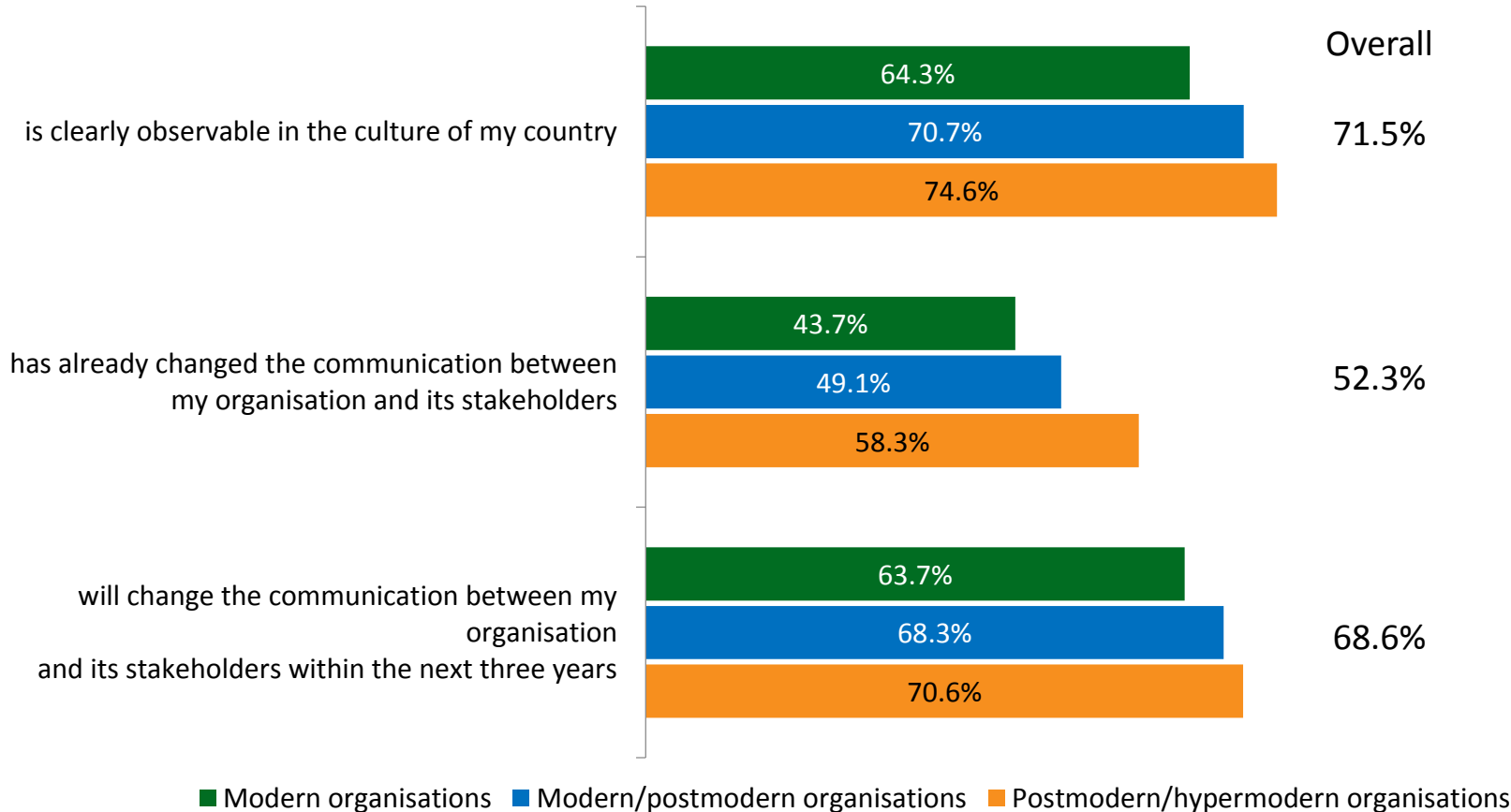
The majority of communication agencies and private companies are currently transitioning from postmodern to hypermodern organisations



www.communicationmonitor.eu / Zerfass et al. 2017 / n = 3,387 communication professionals. Cluster analysis based on Q 10 (characteristics applied to the organisation, ranging from not at all to very much) and Q 11 (importance of characteristics within the organisation’s culture, ranging from not important at all to very important) identified three different groups of respondents. Highly significant differences between types of organisations (chi-square test, $p \leq 0.01$, Cramér’s $V = 0.177$).

Postmodern/hypermodern organisations are ahead in sensing the trend towards an overarching consumer mentality and adopting new communication practices

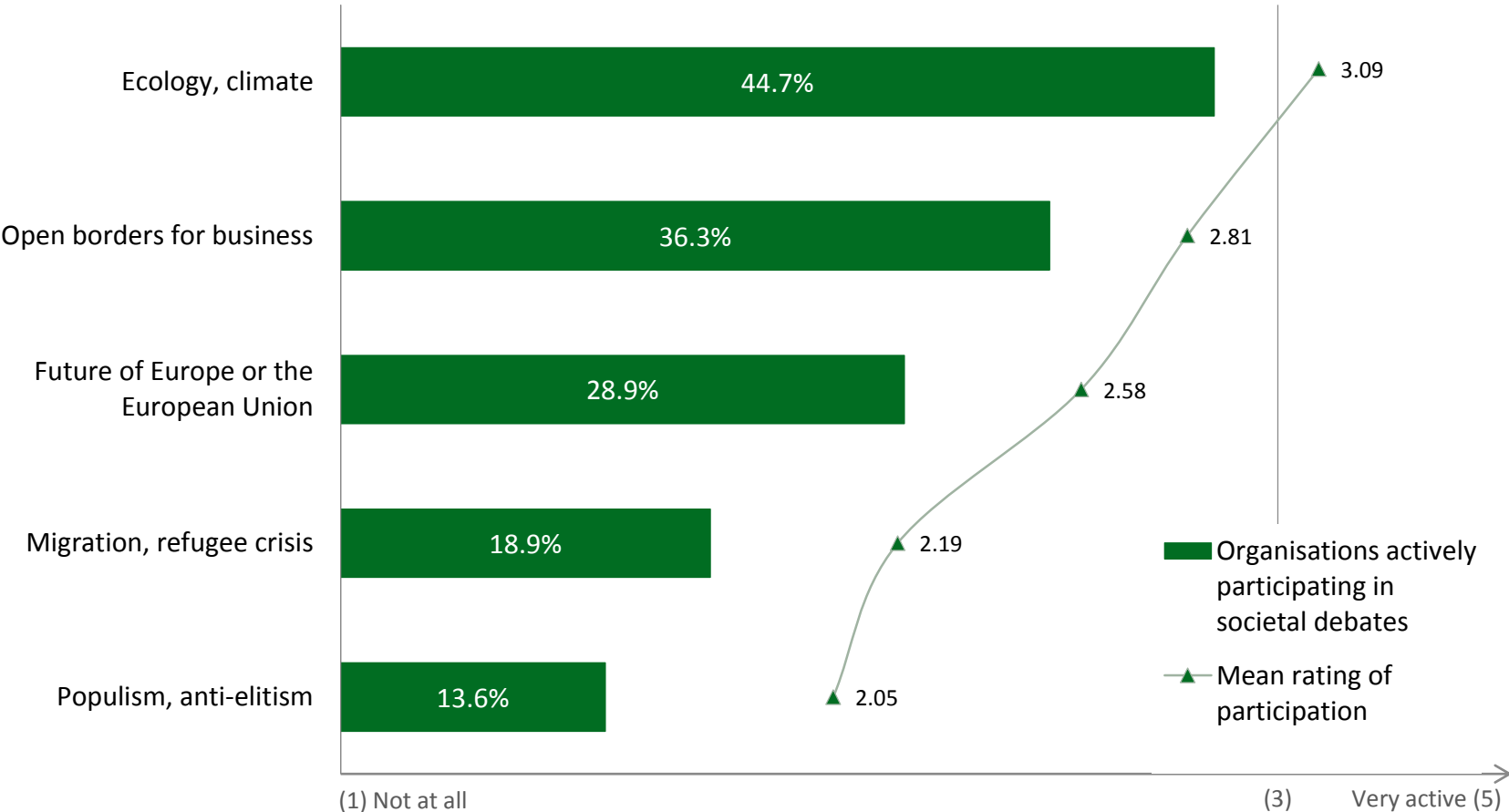
Hypermodernity (consumer mentality) ...



www.communicationmonitor.eu / Zerfass et al. 2017 / n = 3,387 communication professionals. Q 12: Today, many people define themselves primarily as consumers and are constantly striving for pleasure and enjoyment, happiness, perfection and emotional experiences. This is not limited to business, but includes also education, healthcare, religion, etc. Please rate the following statements based on your experience: Scale 1 (Strongly disagree) – 5 (Strongly agree). Percentages: Frequency based on scale points 4-5. Highly significant differences between clusters (chi-square test, $p \leq 0.01$).

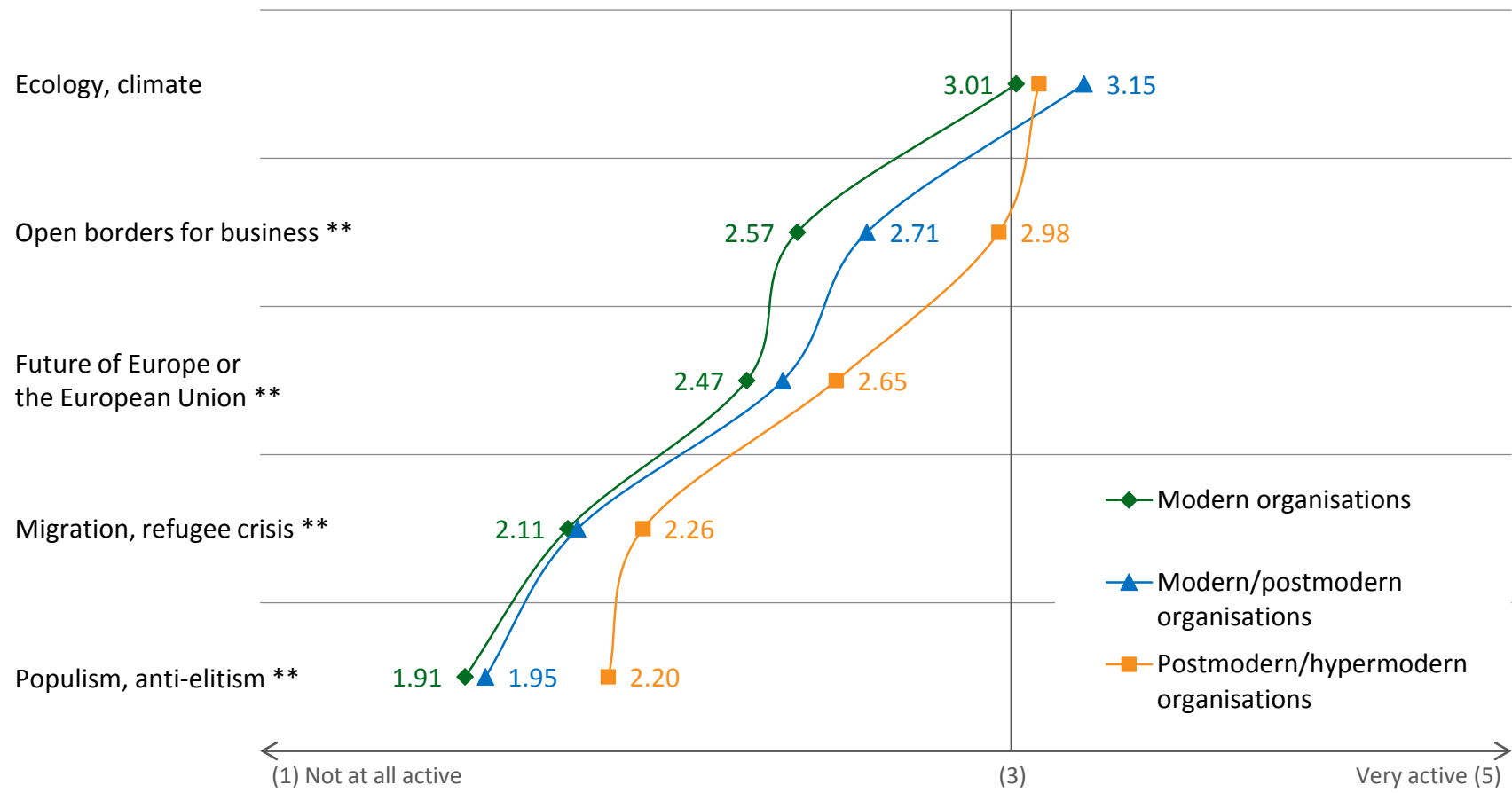
Only a minority of European organisations are actively engaged in public debates about contested topics in society

Organisations participating actively in societal debates about ...



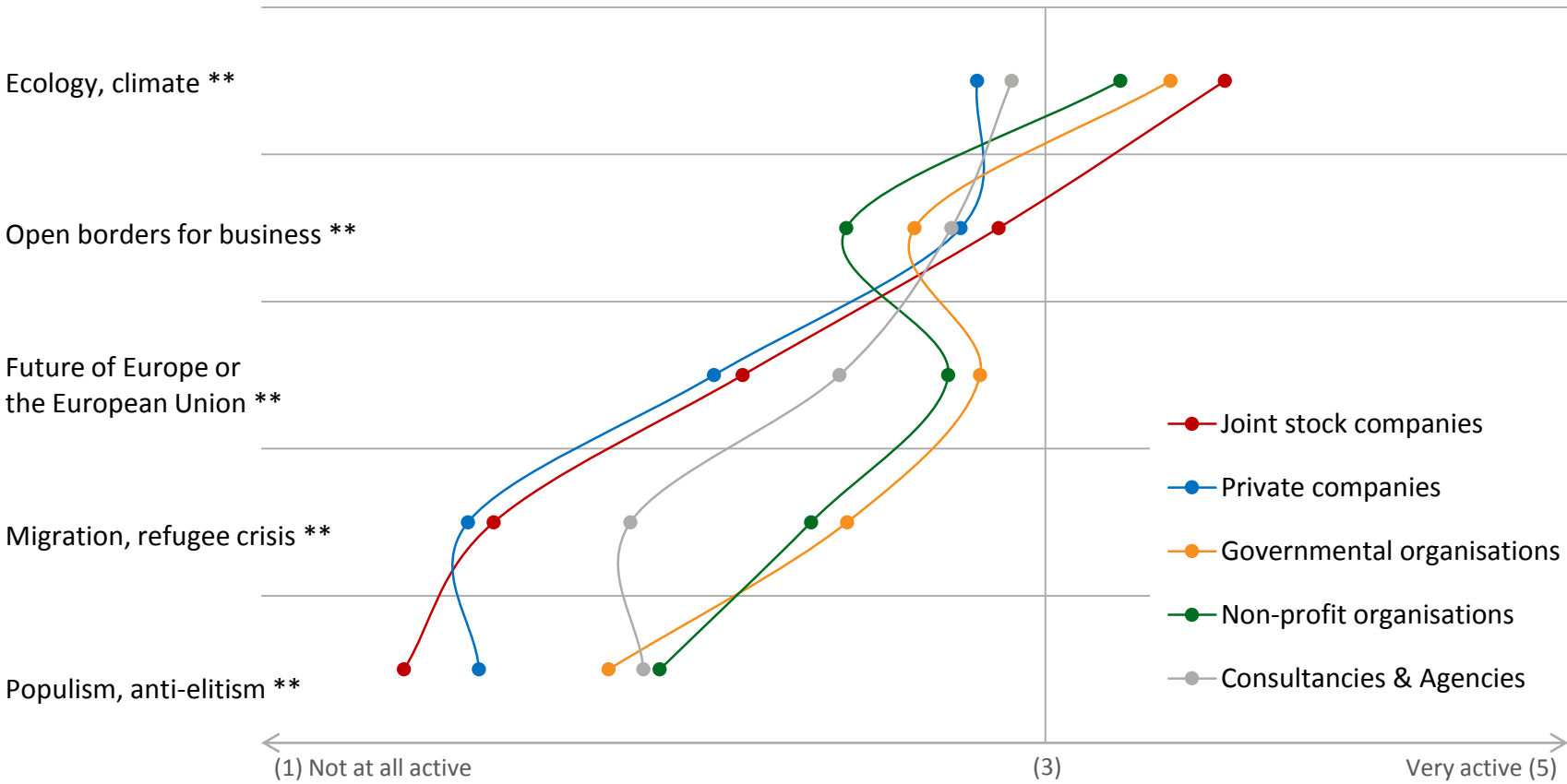
Postmodern/hypermodern organisations communicate significantly more about current societal issues

Participating actively in societal debates about ...



Listed companies are quite active in discussing ecological issues and also promoting open borders for business, but less engaged for the political future of Europe

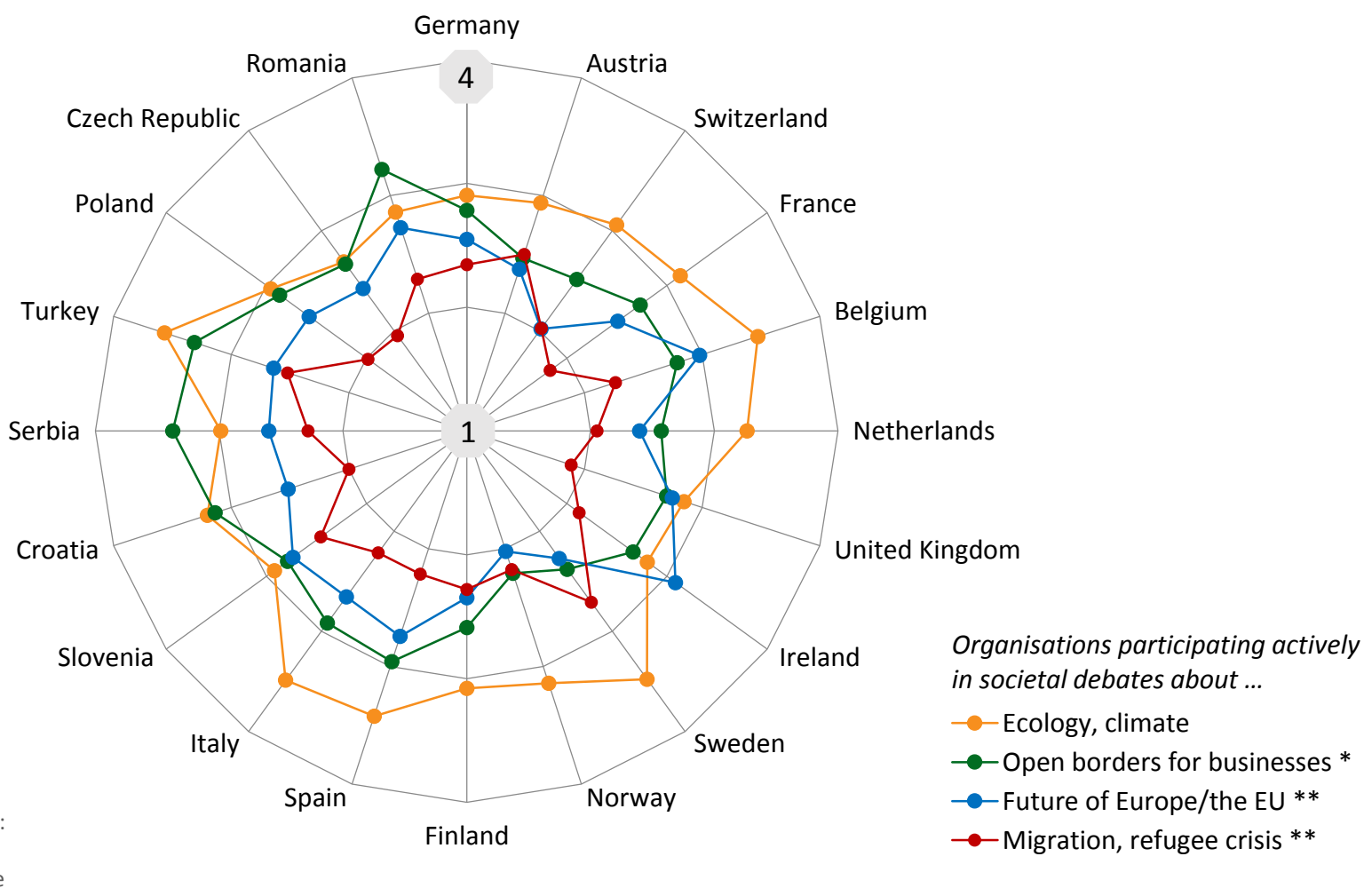
Participating actively in societal debates about ...



www.communicationmonitor.eu / Zerfass et al. 2017 / n = 3,387 communication professionals. Q 13: To what extent does your organisation actively communicate in the following current societal debates? Scale 1 (Not at all) – 5 (Very active). Mean values.

** Highly significant differences (ANOVA/Scheffe post-hoc test, $p \leq 0.01$).

Communicative engagement in societal debates in key European countries



Communicative engagement of organisations for societal issues in Western and Northern Europe

Organisations participating actively in societal debates about ...

	Migration, refugee crisis		Ecology, climate		Populism, anti-elitism		Open borders for business		Future of Europe or the European Union	
	%	M **	% **	M	%	M	% **	M *	% **	M **
Germany	21.3%	2.34	39.1%	2.91	12.6%	1.97	37.9%	2.78	29.2%	2.55
Austria	34.4%	2.50	43.8%	2.94	20.3%	2.08	26.6%	2.47	21.9%	2.38
Switzerland	16.7%	2.02	42.6%	3.06	10.8%	1.80	30.9%	2.51	15.7%	2.02
France	9.2%	1.83	49.2%	3.13	12.5%	1.93	35.8%	2.73	28.3%	2.51
Belgium	20.8%	2.26	60.6%	3.47	14.4%	2.12	33.3%	2.79	41.7%	2.98
Netherlands	15.3%	2.05	52.4%	3.26	11.1%	1.87	30.7%	2.57	22.8%	2.40
United Kingdom	11.5%	1.89	36.3%	2.85	13.5%	1.96	33.5%	2.70	34.4%	2.75
Ireland	16.0%	2.12	36.8%	2.80	12.3%	2.09	34.0%	2.66	43.4%	3.08
Sweden	31.4%	2.71	59.5%	3.48	9.9%	2.02	20.7%	2.38	14.0%	2.27
Norway	23.1%	2.18	48.4%	3.14	18.7%	1.95	20.9%	2.21	16.5%	2.02
Finland	20.7%	2.28	44.7%	3.08	8.9%	1.98	28.5%	2.59	21.8%	2.35

www.communicationmonitor.eu / Zerfass et al. 2017 / n ≥ 2,936 communication professionals from 20 countries. Q 13: To what extent does your organisation actively communicate in the following current societal debates? Scale 1 (Not at all) – 5 (Very active). Percentages: Frequency based on scale points 4-5.

* Significant differences (chi-square test, $p \leq 0.05$). ** Highly significant differences (chi-square test, $p \leq 0.01$). Mean values. * Significant differences (ANOVA/Scheffe post-hoc test, $p \leq 0.05$). ** Highly significant differences (ANOVA/Scheffe post-hoc test, $p \leq 0.01$).

Communicative engagement of organisations for societal issues in Southern and Eastern Europe

Organisations participating actively in societal debates about ...

	Migration, refugee crisis		Ecology, climate		Populism, anti-elitism		Open borders for business		Future of Europe or the European Union	
	%	M **	% **	M	%	M	% **	M *	% **	M **
Spain	22.3%	2.21	58.7%	3.42	13.2%	2.01	42.1%	2.96	32.2%	2.74
Italy	20.0%	2.22	60.0%	3.49	9.4%	1.98	33.9%	2.92	29.4%	2.66
Slovenia	25.4%	2.46	34.2%	2.92	9.6%	2.05	31.6%	2.79	34.2%	2.74
Croatia	13.0%	2.00	47.2%	3.20	18.5%	2.22	48.1%	3.14	28.7%	2.52
Serbia	20.0%	2.28	41.2%	2.99	18.8%	2.36	50.6%	3.38	27.1%	2.60
Turkey	23.9%	2.52	59.7%	3.57	11.9%	2.39	47.8%	3.31	25.4%	2.64
Poland	10.3%	1.99	41.2%	2.96	8.8%	2.07	41.2%	2.87	26.5%	2.57
Czech Republic	13.0%	1.95	31.7%	2.69	10.6%	2.01	33.3%	2.67	20.3%	2.42
Romania	23.3%	2.29	36.0%	2.86	16.3%	2.30	47.1%	3.22	36.0%	2.73

www.communicationmonitor.eu / Zerfass et al. 2017 / n ≥ 2,936 communication professionals from 20 countries. Q 13: To what extent does your organisation actively communicate in the following current societal debates? Scale 1 (Not at all) – 5 (Very active). Percentages: Frequency based on scale points 4-5.

* Significant differences (chi-square test, $p \leq 0.05$). ** Highly significant differences (chi-square test, $p \leq 0.01$). Mean values. * Significant differences (ANOVA/Scheffe post-hoc test, $p \leq 0.05$). ** Highly significant differences (ANOVA/Scheffe post-hoc test, $p \leq 0.01$).

**Benchmarking and
quality management**



Chapter overview

Benchmarking is a familiar term in society today – we talk about this as a process to evaluate schools, hospitals, universities and of course businesses (Bogetoft, 2012). We even talk about benchmarking as individuals to measure or position ourselves against others whether in the context of employment (getting a new role or job) or even in our leisure (for example our time to run a specific distance measured against people of a similar age category).

In organisations benchmarking and quality management is an emerging area for strategic communicators to grapple with. Within the organisational context benchmarking is “a systematic and continuous measurement process; a process of continuously measuring and comparing an organisation’s business process against business leaders anywhere in the world to gain information which will help the organisation to take action to improve its performance” (Watson, 1993, p. 258; see also EFQM, 2015; Lema & Price, 1995). Benchmarking has truly revolutionised the culture of businesses in the West and the way with which it is organised, managed and run (Yarrar & Zairi, 2001) and it can be done with different referent others (Fong et al., 1998).

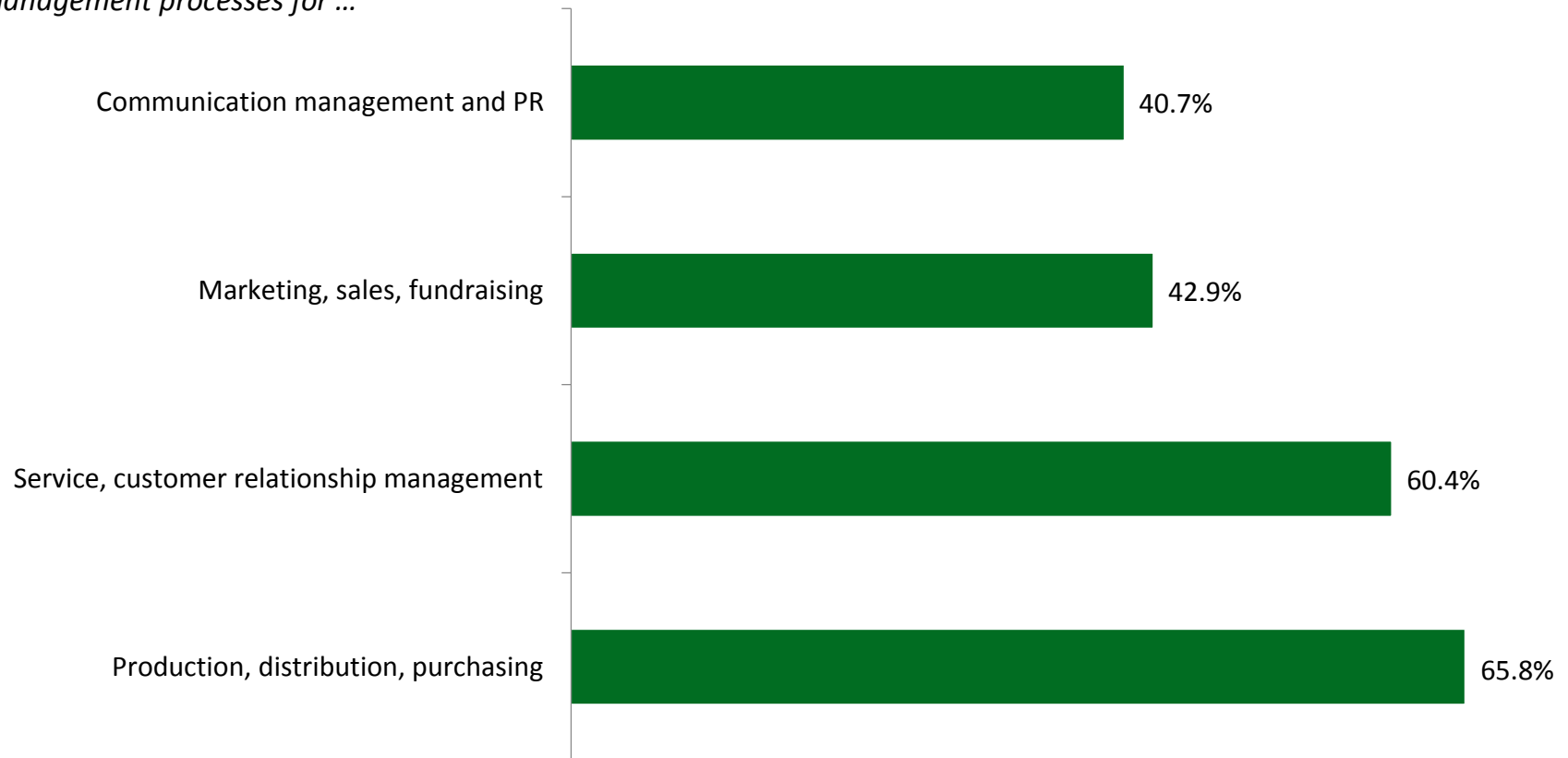
Within the ECM for 2017 we endeavoured to understand how not only the respondent’s organisations use benchmarking and measurement but importantly how do strategic communicators and their departments. Benchmarking communications has been a neglected field for many decades (Gardner & Winder, 1999; Phelps, 1997).

When we look at the detail of responses on benchmarking and quality management there are some unsurprising initial findings. For example, communication departments generally have fewer quality management processes (40.7 per cent) when compared to other organisational functions such as marketing, sales, fundraising (42.9 per cent), service and customer relationship management (60.4 per cent) or production, distribution and purchasing (65.8 per cent). Comparing different types of organisation, listed companies lead the way and have institutionalised quality management in general to a higher extent and more comprehensively. Also, the positive news is that organisations who have implemented quality management processes for communication management also use all kinds of benchmarking approaches more frequently than the rest.

Considering the way benchmarking is applied inside communication departments it is valuable to note that they mainly focus benchmarking on their messaging activities. The overall performance of the department, processes and externally validated standards of performance seem to be less relevant. To exemplify this, we can see that communication departments are testing themselves and their communication outputs through media and social media monitoring (51.1 per cent) or website performance evaluation (46.7 per cent) against their competitors. One third even use external award competitions to evaluate strategic communication campaigns and media products – especially by listed companies and agencies supporting them. The low institutionalisation of benchmarking on the overall departmental level might be caused by the lack of standardised and neutral approaches to collect and compare sensitive data about budgets, personnel, and structures in communications.

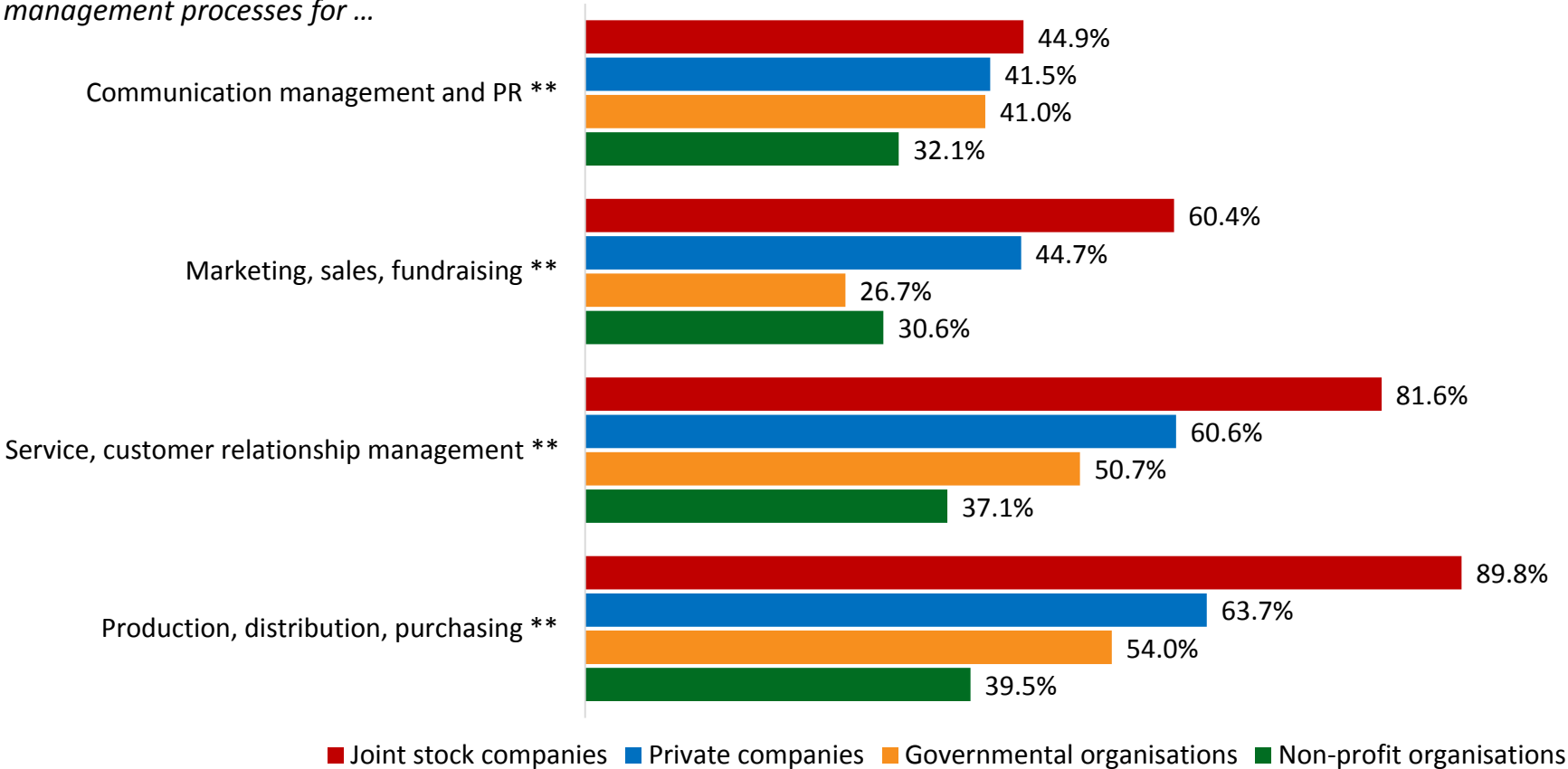
Quality management and continuous improvement is less common in communication departments, compared to other organisational functions

Organisations with certified quality management processes for ...



Listed companies have institutionalised quality management in general to a higher extent – which makes the backlog of communications even more critical

My organisation has certified quality management processes for ...



www.communicationmonitor.eu / Zerfass et al. 2017 / n = 1,953 communication professionals working in communication departments. Q 14: Many organisations use quality management based on benchmarks, audits and certifications (ISO, TQM) to ensure a good performance and continuous improvement of their activities. How does your organisation act in this field? My organisation has certified management processes for ... (Yes, No, Don't know). Percentages: Yes selection.

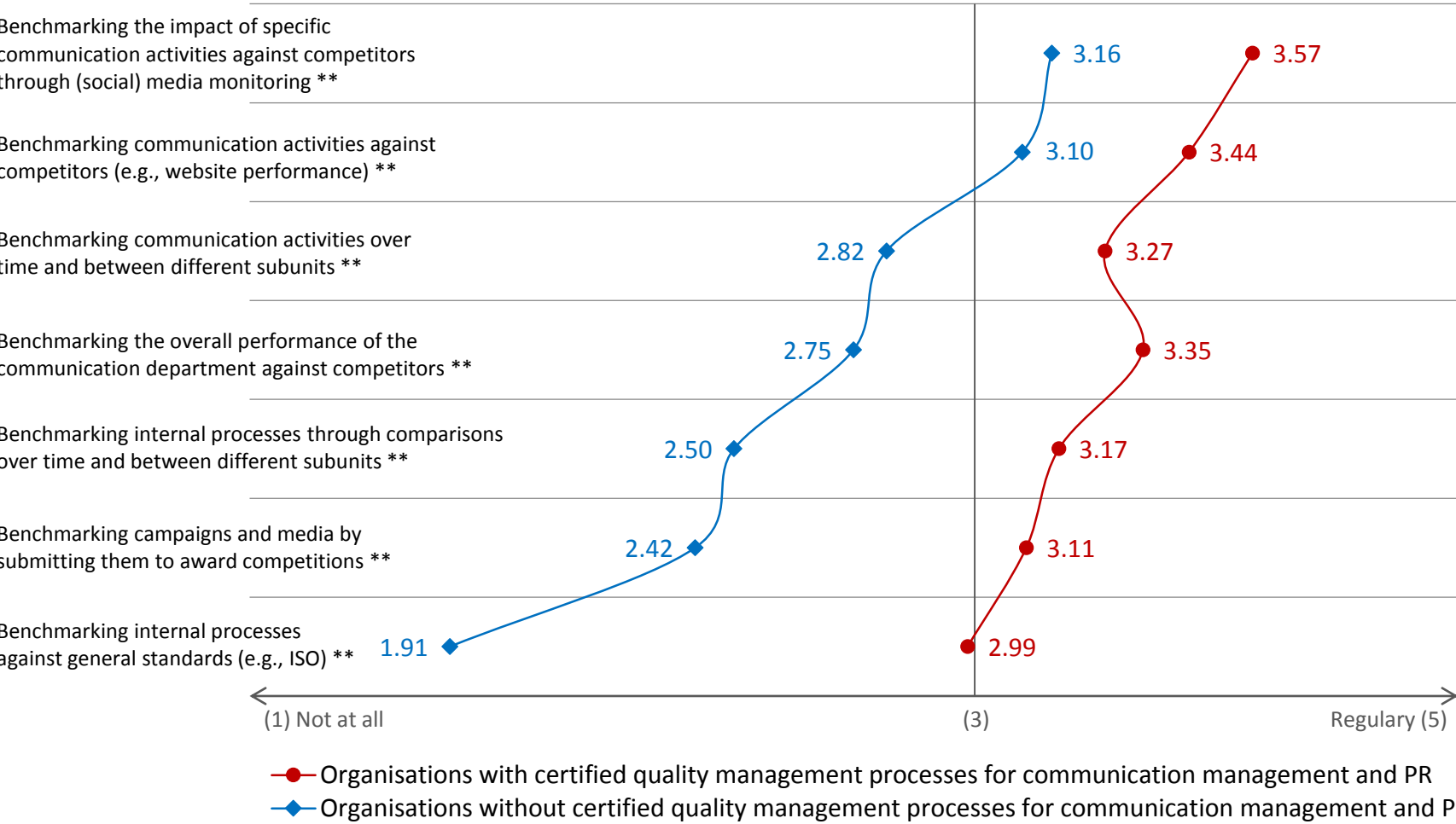
** Highly significant differences (chi-square test, p ≤ 0.01).

Certified quality management processes in different European countries

	Communi- cation management and PR	Marketing, sales, fundraising	Service, customer relationship management	Production, distribution, purchasing		Communi- cation management and PR	Marketing, sales, fundraising	Service, customer relationship management	Production, distribution, purchasing
Germany	32.4%	43.6%	69.5%	80.6%	Finland	25.6%	23.6%	50.4%	64.2%
Austria	34.4%	33.3%	62.1%	75.0%	Spain	43.2%	49.2%	69.1%	76.1%
Switzerland	33.1%	44.4%	62.2%	70.7%	Italy	44.6%	49.5%	68.0%	73.6%
France	34.5%	43.5%	66.2%	76.9%	Slovenia	23.0%	25.8%	32.1%	37.7%
Belgium	36.1%	32.9%	50.0%	56.4%	Croatia	51.7%	45.6%	62.9%	54.1%
Netherlands	35.4%	45.4%	64.7%	73.0%	Serbia	59.6%	66.0%	71.4%	75.9%
United Kingdom	44.6%	47.5%	61.4%	64.8%	Turkey	50.0%	64.3%	82.8%	70.4%
Ireland	41.1%	30.0%	54.3%	56.3%	Poland	38.9%	36.4%	46.7%	51.6%
Sweden	53.4%	53.6%	59.5%	68.5%	Czech Republic	40.0%	39.3%	53.6%	53.7%
Norway	33.3%	29.0%	54.2%	61.9%	Romania	72.7%	68.2%	69.0%	70.5%

www.communicationmonitor.eu / Zerfass et al. 2017 / n ≥ 1,665 communication professionals working in communication departments in 20 European countries. Q 14: Many organisations use quality management based on benchmarks, audits and certifications (ISO, TQM) to ensure a good performance and continuous improvement of their activities. How does your organisation act in this field? My organisation has certified management processes for ... (Yes, No, Don't know). Percentages: Yes selection. Highly significant differences for all items (chi-square test, $p \leq 0.01$).

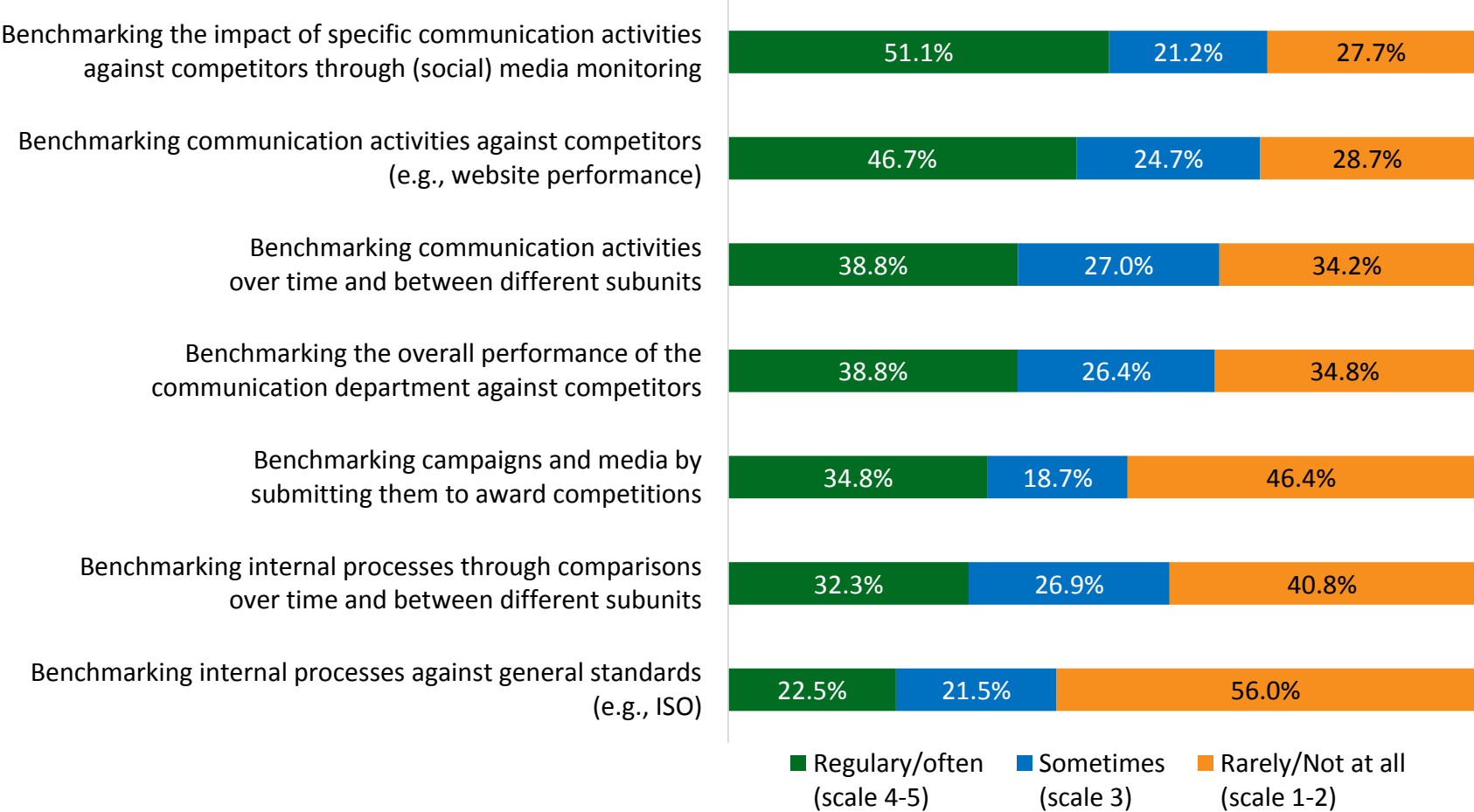
Organisations with certified quality management processes for communications use benchmarking approaches quite regularly



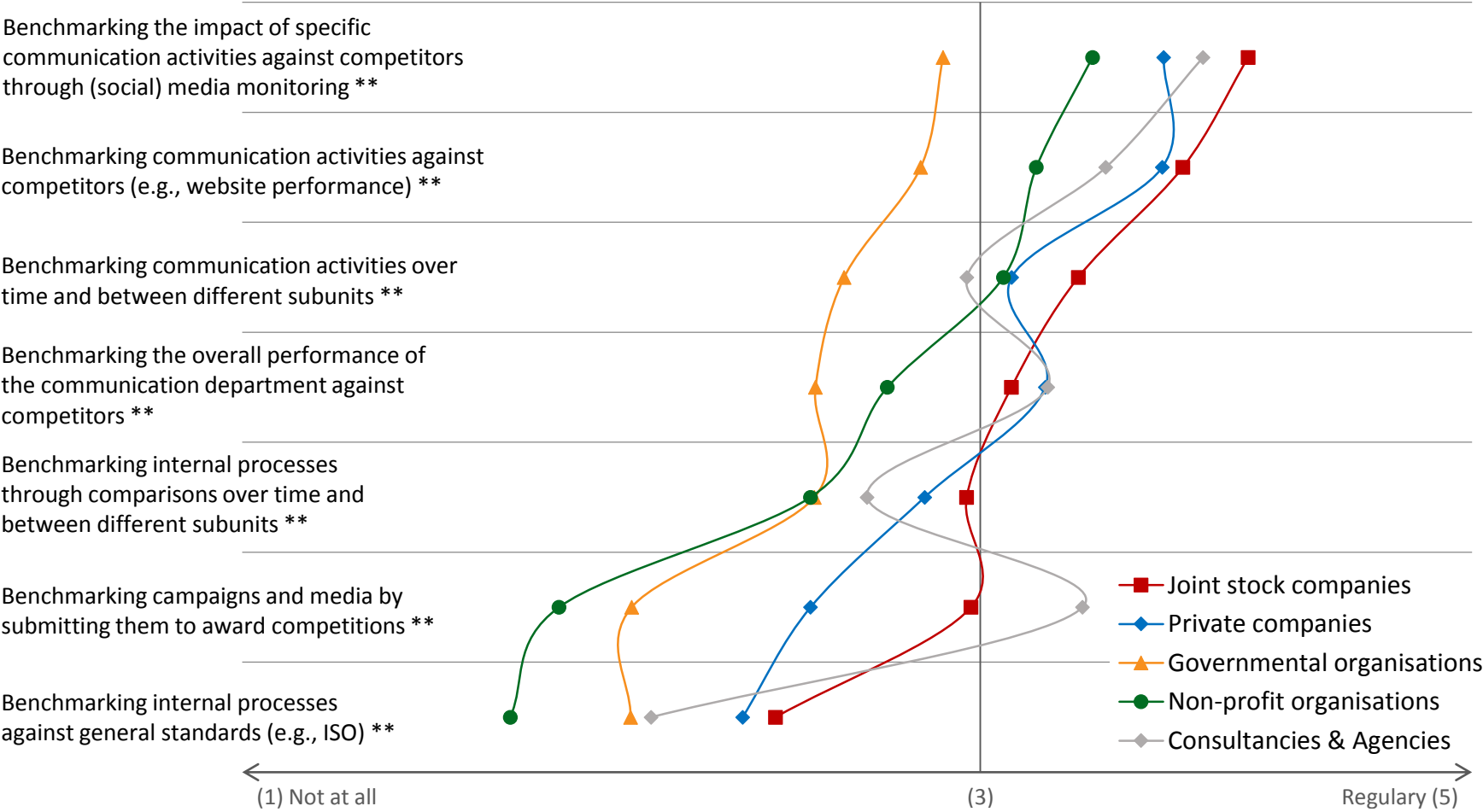
www.communicationmonitor.eu / Zerfass et al. 2017 / n = 2,650 communication professionals. Q 14: Many organisations use quality management based on benchmarks, audits and certifications (ISO, TQM) to ensure a good performance and continuous improvement of their activities. How does your organisation act in this field? My organisation has certified management processes for communication management and PR (Yes, No). Q 15: Which kind of benchmarks are applied in your communication department or agency? Scale 1 (Not at all)–5 (Regularly). ** Highly significant differences (Pearson correlation, $p \leq 0.01$).

Benchmarking is mainly focused on communication activities, less on processes and externally validated standards

How different benchmarking approaches are utilised by communication departments/agencies



Communication departments of listed companies use benchmarking more intensively – award competitions are valued quite differently across organisations



Benchmarking practices in Western and Northern Europe

Bench- marking ...	the impact of specific communication activities against competitors through (social) media monitoring	communication activities against competitors (e.g., website performance)	communication activities over time and between different subunits	the overall performance of the communication department against competitors	internal processes through comparisons over time and between different subunits	campaigns and media by submitting them to award competitions	internal processes against general standards (e.g., ISO)
Germany	55.9%	46.7%	44.5%	39.3%	32.8%	38.4%	13.1%
Austria	57.4%	55.7%	32.8%	49.2%	24.6%	36.1%	27.9%
Switzerland	47.1%	45.5%	33.2%	34.8%	24.6%	23.5%	17.6%
France	54.5%	48.2%	42.7%	30.9%	30.0%	38.2%	19.1%
Belgium	51.6%	45.8%	38.9%	30.0%	30.5%	26.3%	21.1%
Netherlands	49.7%	46.8%	38.6%	31.0%	27.5%	32.7%	24.0%
United Kingdom	52.3%	52.6%	44.7%	37.8%	35.3%	41.1%	25.4%
Ireland	45.1%	40.2%	38.2%	44.1%	33.3%	41.2%	28.4%
Sweden	34.9%	39.4%	41.3%	28.4%	34.9%	25.7%	22.9%
Norway	48.1%	55.6%	24.7%	25.9%	17.3%	28.4%	13.6%
Finland	49.7%	45.1%	43.8%	37.3%	28.1%	31.4%	17.0%

www.communicationmonitor.eu / Zerfass et al. 2017 / n = 2,609 communication professionals from 20 countries. Q 15: Which kind of benchmarks are applied in your communication department or agency? Scale 1 (Not at all) – 5 (Regularly). Percentages: Frequency based on scale points 4-5.

** Highly significant differences for all items (chi-square test, $p \leq 0.01$).

Benchmarking practices in Southern and Eastern Europe

Bench- marking ...	the impact of specific communication activities against competitors through (social) media monitoring	communication activities against competitors (e.g., website performance)	communication activities over time and between different subunits	the overall performance of the communication department against competitors	internal processes through comparisons over time and between different subunits	campaigns and media by submitting them to award competitions	internal processes against general standards (e.g., ISO)
Spain	52.9%	43.3%	27.9%	40.4%	26.9%	29.8%	23.1%
Italy	44.2%	42.3%	29.4%	39.3%	25.8%	27.6%	20.2%
Slovenia	51.6%	44.2%	37.9%	41.1%	35.8%	32.6%	23.2%
Croatia	43.8%	40.4%	38.2%	46.1%	43.8%	41.6%	36.0%
Serbia	63.5%	56.8%	43.2%	54.1%	41.9%	51.4%	29.7%
Turkey	64.4%	61.0%	47.5%	52.5%	44.1%	52.5%	32.2%
Poland	52.6%	38.6%	33.3%	35.1%	22.8%	31.6%	8.8%
Czech Republic	52.4%	46.7%	34.3%	37.1%	33.3%	45.7%	17.1%
Romania	50.4%	46.8%	42.4%	44.6%	44.6%	38.1%	33.1%

www.communicationmonitor.eu / Zerfass et al. 2017 / n = 2,609 communication professionals from 20 countries. Q 15: Which kind of benchmarks are applied in your communication department or agency? Scale 1 (Not at all) – 5 (Regularly). Percentages: Frequency based on scale points 4-5.

** Highly significant differences for all items (chi-square test, $p \leq 0.01$).

Contribution of communication departments to organisational success



Chapter overview

Strategic communication is characterised by its orientation and ability to support organisational goals. However, previous studies indicate that communicators seldom report on how their department contributes to overall strategic goals (Brønn, 2014). At the same time, top management seldom knows about the variety of roles communication practitioners can take and often tend to estimate them as channel producers or technicians (Falkheimer et al., 2017). Building on these discussions, recent research has systematised the different contributions of communication departments to overall success into four clusters (convey and multiply; align and contribute; steer and manage; advise and coach) with two dimensions: A strategic and an operational dimension (Volk et al., 2017; Zeffass & Volk, 2017).

This year the ECM survey asked heads of communication departments to reflect on the several contributions of their departments to their organisation's success. The possible contributions were all confirmed and rated high by more than 70 per cent of all respondents. Supporting operational goals and processes of other departments through communication activities is a frequently performed task (by 86.8 per cent) followed by the daily management of the communication department (86.7 per cent), its constant improvement and further development (85.5 per cent), and translating the organisational strategy into a fully aligned communication strategy (84.5 per cent).

A systematic analysis of those scores reveals that communication leaders have a balanced understanding of their department's strategic and operational contributions to success. Managing and steering the department itself is considered the most important, followed by aligning communication to organisational strategy and supporting business processes. Except for advising and coaching top management all other contributions are rated significantly different by communication leaders from various types of organisations.

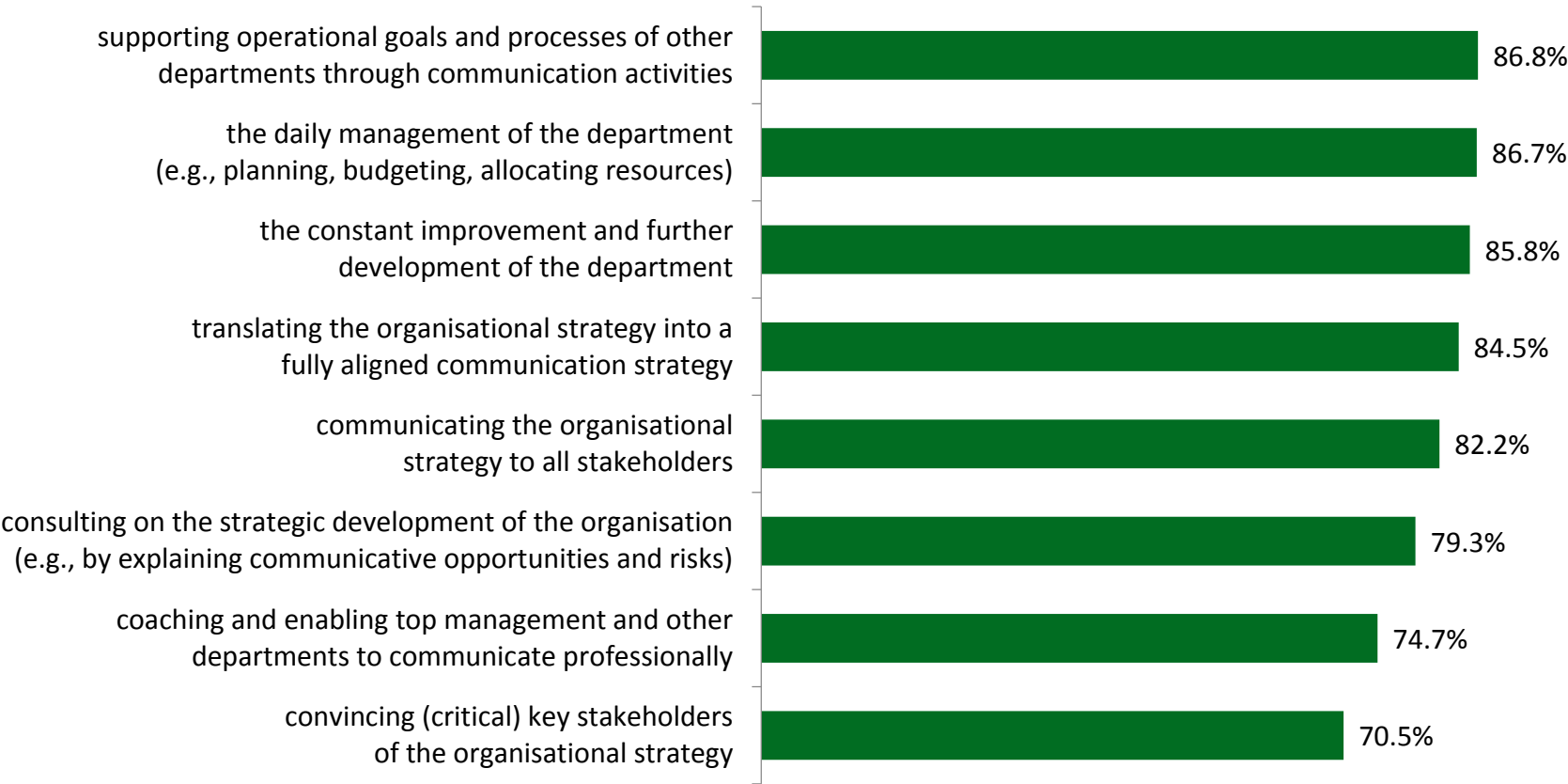
Heads of communication confirm that their top management demands the whole range of activities from the communication department with a clear focus on operational aspects like helping other departments to communicate (76.7 per cent) and communicating organisational strategies (70.3 per cent). This indicates that top management most often expects communication departments to contribute to organisational goals by conveying and multiplying messages to stakeholders.

Respondents however also believe that top managers are not aware of the full range of contributions that communication departments can deliver. The data reveal large differences on whether advising and coaching on strategy or communication and managing a communication department is important for organisational success. Top managers are perceived to be more interested in the traditional communication function of the department and seem to doubt a role for communication in the strategic development of the organisation. Also the overall benefits of managing a communication department efficiently and effectively in today's complex media environment seem to be valued less by top executives.

More research and sharing of good practices is needed to explore these questions in detail. The empirical results support the theoretical framework derived from interdisciplinary research. Using these insights as a management tool for positioning communication departments within organisations can help to leverage the full potential of the function.

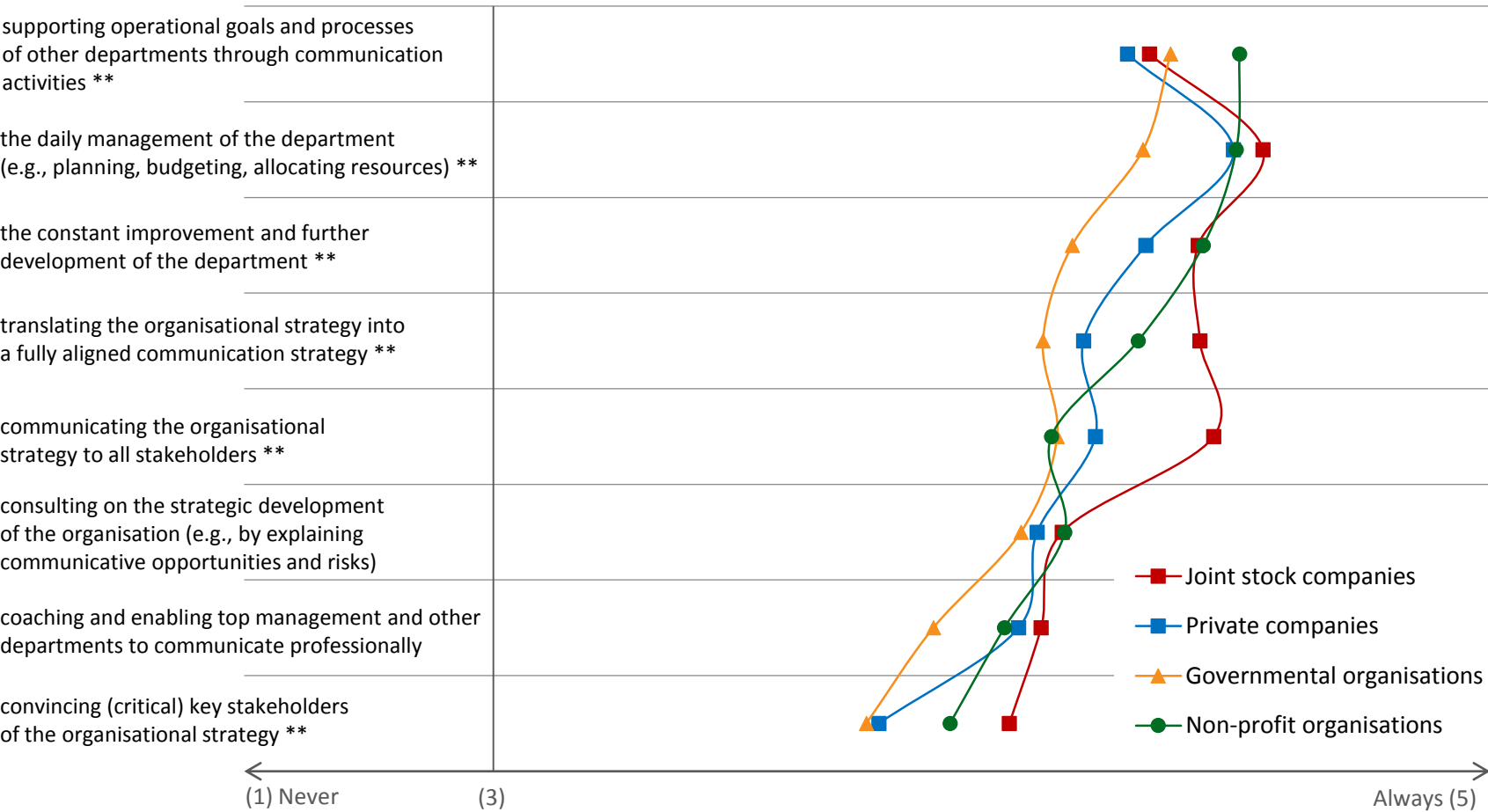
Heads of communication rate the contributions of their departments to organisational success quite high, but not all aspects are equally prevalent

The contribution of the communication department to overall success includes ...

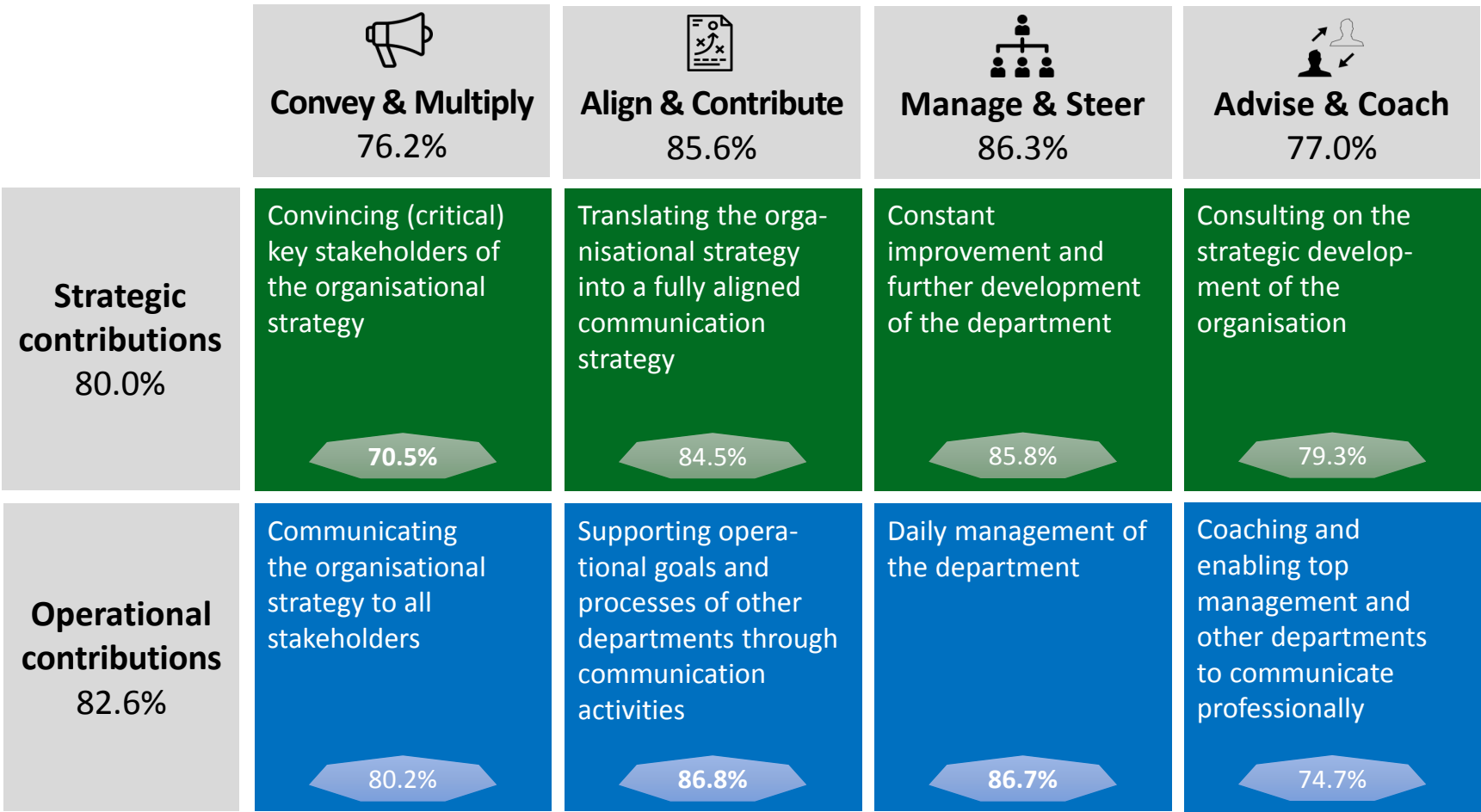


Communication leaders in different types of organisations report a significantly different understanding why communications is relevant for success

The contribution of the communication department to overall success includes ...



A systematic analysis shows that communication leaders have a rather balanced understanding of communications’ contributions to success







Communicators state that top management demands the whole range of activities from their departments – with a clear focus on operational aspects

Contributions of the communication department for overall success demanded by top management




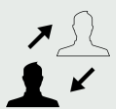


■ Strategic contributions ■ Operational contributions demanded by top management

According to the respondents, top managers are not aware of the full range of strategic and operational contributions provided by their departments

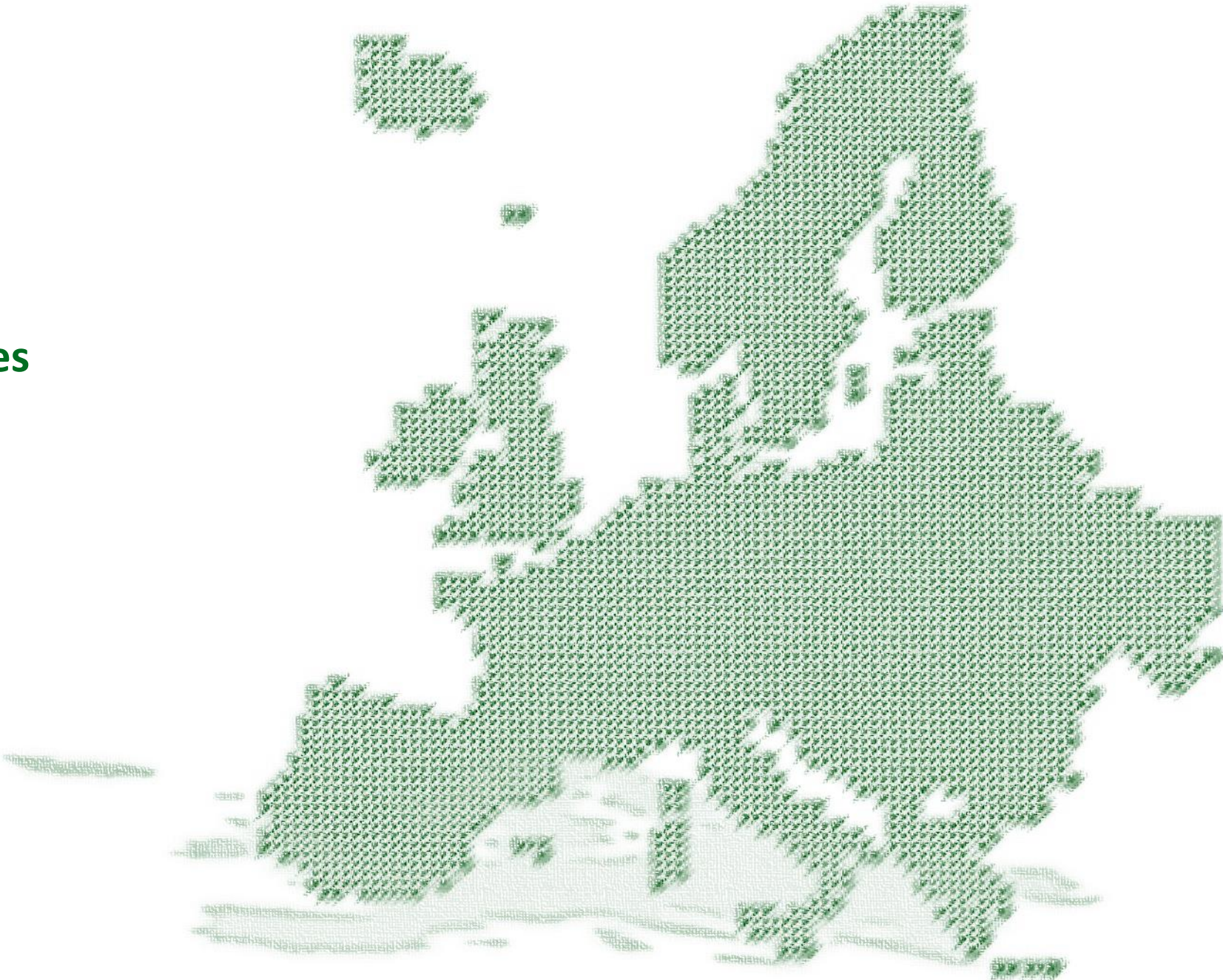
	<div> Convey & Multiply Δ 16.0</div>	<div> Align & Contribute Δ 12.1</div>	<div> Manage & Steer Δ 21.7</div>	<div> Advise & Coach Δ 20.9</div>																							
Strategic contributions Δ 20.1	Convincing (critical) key stakeholders of the organisational strategy	Translating organisational strategy into a communication strategy	Constant improvement and further development of the department	Consulting on the strategic development of the organisation																							
	<table><tr><td>Comm. Leaders</td><td>Top Management</td></tr><tr><td>70.5%</td><td>50.8%</td></tr><tr><td colspan="2">Δ 19.7</td></tr></table>	Comm. Leaders	Top Management	70.5%	50.8%	Δ 19.7		<table><tr><td>Comm. Leaders</td><td>Top Management</td></tr><tr><td>84.5%</td><td>70.5%</td></tr><tr><td colspan="2">Δ 14.0</td></tr></table>	Comm. Leaders	Top Management	84.5%	70.5%	Δ 14.0		<table><tr><td>Comm. Leaders</td><td>Top Management</td></tr><tr><td>85.8%</td><td>60.1%</td></tr><tr><td colspan="2">Δ 25.7</td></tr></table>	Comm. Leaders	Top Management	85.8%	60.1%	Δ 25.7		<table><tr><td>Comm. Leaders</td><td>Top Management</td></tr><tr><td>79.3%</td><td>58.84%</td></tr><tr><td colspan="2">Δ 20.9</td></tr></table>	Comm. Leaders	Top Management	79.3%	58.84%	Δ 20.9
Comm. Leaders	Top Management																										
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Δ 25.7																											
Comm. Leaders	Top Management																										
79.3%	58.84%																										
Δ 20.9																											
Operational contributions Δ 13.7	Communicating the organisational strategy to all stakeholders	Supporting other departments through communication activities	Daily management of the department	Coaching/enabling top management and others to communicate																							
	<table><tr><td>Comm. Leaders</td><td>Top Management</td></tr><tr><td>82.2%</td><td>70.3%</td></tr><tr><td colspan="2">Δ 11.9</td></tr></table>	Comm. Leaders	Top Management	82.2%	70.3%	Δ 11.9		<table><tr><td>Comm. Leaders</td><td>Top Management</td></tr><tr><td>85.8%</td><td>76.7%</td></tr><tr><td colspan="2">Δ 10.1</td></tr></table>	Comm. Leaders	Top Management	85.8%	76.7%	Δ 10.1		<table><tr><td>Comm. Leaders</td><td>Top Management</td></tr><tr><td>86.7%</td><td>69.3%</td></tr><tr><td colspan="2">Δ 17.4</td></tr></table>	Comm. Leaders	Top Management	86.7%	69.3%	Δ 17.4		<table><tr><td>Comm. Leaders</td><td>Top Management</td></tr><tr><td>74.7%</td><td>59.4%</td></tr><tr><td colspan="2">Δ 15.3</td></tr></table>	Comm. Leaders	Top Management	74.7%	59.4%	Δ 15.3
Comm. Leaders	Top Management																										
82.2%	70.3%																										
Δ 11.9																											
Comm. Leaders	Top Management																										
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Comm. Leaders	Top Management																										
86.7%	69.3%																										
Δ 17.4																											
Comm. Leaders	Top Management																										
74.7%	59.4%																										
Δ 15.3																											

Expectation gap between perceived contributions of communication departments and demands of top management in different types of organisations

Contributions of the communication department to overall success ...		Companies		Governmental organisations		Non-profit organisations		Overall	
		Contribution	Demand	Contribution	Demand	Contribution	Demand	Contribution	Demand
	convincing (critical) key stakeholders of the organisational strategy	70.9%	51.2% **	66.5%	59.9% **	73.1%	40.7% **	70.5%	50.8% **
	communicating the organisational strategy to all stakeholders	85.0%	73.5% **	77.9%	71.9% **	76.7%	57.9% **	82.2%	70.3% **
	translating the organisational strategy into a fully aligned communication strategy	85.9% **	75.1% **	77.6% **	61.5% **	86.2% **	62.9% **	84.5% **	70.5% **
	supporting operational goals and processes of other departments through communication activities	85.6%	75.9%	86.9%	78.2%	91.1%	77.8%	86.8%	76.7%
	the constant improvement and further development of the department	86.7%	61.1%	77.4%	60.6%	90.9%	56.4%	85.8%	60.1%
	the daily management of the department (e.g., planning, budgeting, allocating resources)	88.3%	69.1%	81.4%	70.5%	86.0%	68.8%	86.7%	69.3%
	consulting on the strategic development of the organisation (e.g., by explaining communicative opportunities and risks)	78.6%	57.1%	81.2%	62.6%	79.9%	59.0%	79.3%	58.4%
	coaching and enabling top management and other departments to communicate professionally	76.2%	59.3%	67.6%	61.0%	75.9%	58.5%	74.7%	59.4%

www.communicationmonitor.eu / Zerfass et al. 2017 / n ≥ 834 heads of communication departments. Q 18: Communication departments can contribute to the overall success of organisations in many different ways, but top management does not always ask for all of these contributions. Perceived contributions: Item "The strategic/operational contribution of my department includes ...". Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5. Perceived demand: Item "Demanded by our top management". Percentage: Frequency based on agreement. Highly significant differences for all items (chi-square test, p ≤ 0.01).

Salaries



Chapter overview

Like previous editions the ECM 2017 gives an overview of annual salaries for communication professionals in Europe. Results this year are based on a large sample of up to 2,892 professionals who agreed to give disclosure about their personal income. Nevertheless, the results are only a snapshot. Changes over the years might be related to a rising or declining recognition of the profession as well as to overall economic developments and to variations in the composition of respondents in the samples and the income differences across Europe.

In 2017, almost every tenth communicator surveyed earns more than €150,000 base salary per year (9.1 per cent). But only a very small group (1.4 per cent) makes more than €300,000. At the other end of the scale, about one out of five (21.1 per cent) earns less than €30,000 per year. These figures have to be put into context. The average annual income in the 20 key countries analysed differs a great deal (EUROSTAT, 2017a). Communication professionals are comparatively well off in economic terms, although the income spread within single countries and across Europe is quite broad.

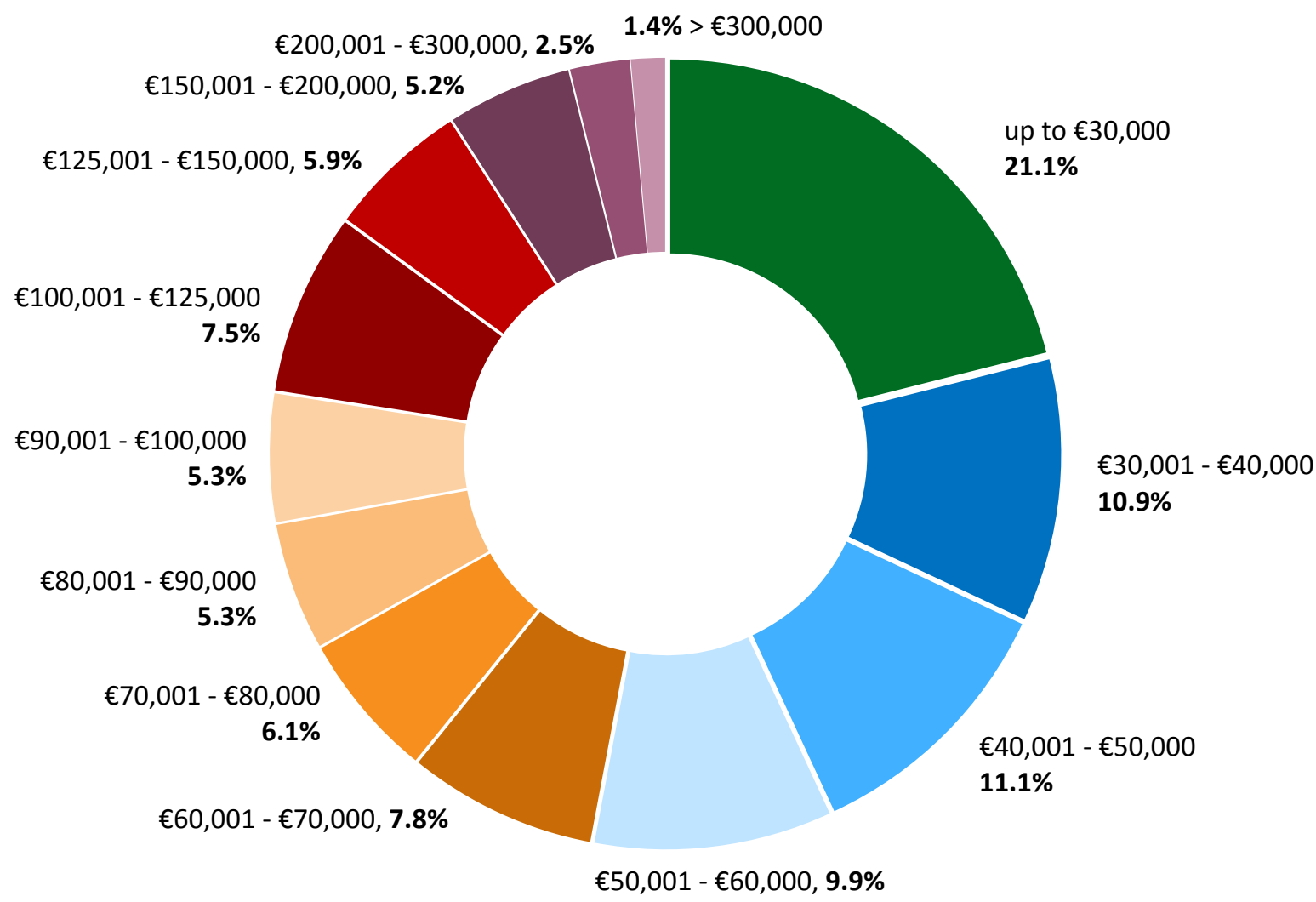
The comparison of annual salaries over time has to be related to hierarchical positions. The portion of communication heads and agency CEOs with an annual income over €150,000 stays relatively stable since 2009 (between 13.4 and 18.4 per cent), although this year the number of respondents in that group is again a bit lower than in 2016. Longitudinal data also showed earlier that there is a stable portion earning the same without being at the top of the hierarchy (between three and four per cent) and this year's results confirm these numbers. The field of strategic communication continues to be an interesting career prospect, not only for communication leaders, but also for specialists and mid-level leaders.

The data this year as with previous continues to demonstrate a clear gender divide. Salaries reported by female practitioners are significantly lower compared to male communicators, both for top positions and other hierarchical levels. This year in the sample there are 24.0 per cent of the respondents who are male communication heads and agency CEOs who make more than €150,000, but only 11.3 per cent of female leaders in the same salary band, lower than in 2016. There are also 23.5 per cent women compared to 15.1 per cent men who earn less than €30,000 on the top level of the hierarchy. These results and the underlying discussion about a gender pay gap in communications (e.g., Tench & Laville, 2017; Tench et al., 2017) has to be mirrored with overall labour statistics. These show that a pay gap is a common fact across all industries in Europe (EUROSTAT, 2017b). Without underestimating the results, this has to be taken into account when interpreting the empirical insights of this study for communication professionals.

Generally, joint stock and private companies pay better than non-profit and governmental organisations. Most respondents reporting a lower annual income work in consultancies and agencies. But agency people are also well represented in higher salary bands. This supports the claim that working for a consultancy is financially less rewarding for newcomers and mid-level professionals.

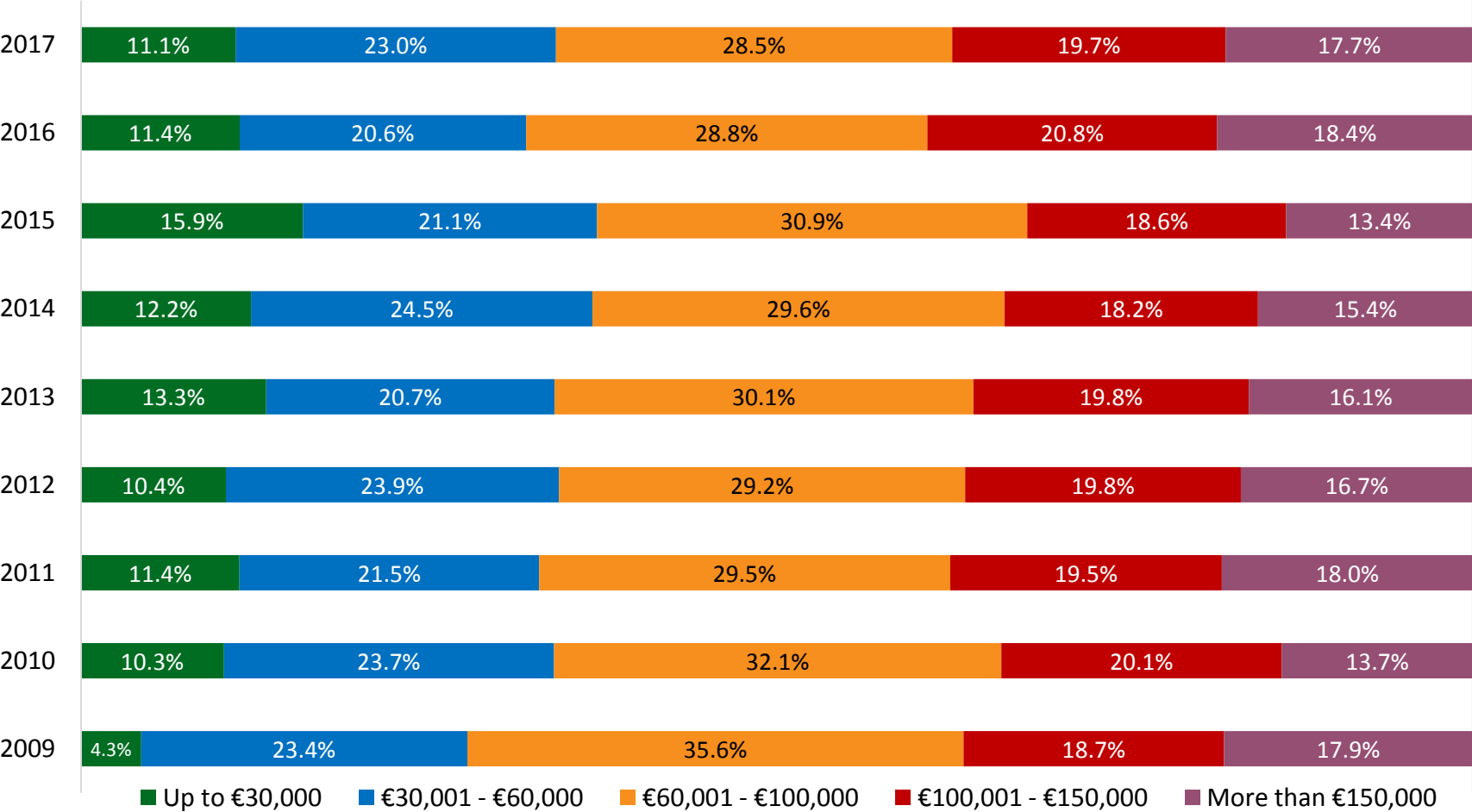
Looking at the distribution of incomes across different countries in Europe it is immediately clear that the average level of salary differs a lot between the different regions of Europe. Generally speaking we can see that in Southern and Eastern Europe the salaries in the communication profession are lower than in other regions of the continent. Finally, EACD members are in a more advantageous position when compared to their non-member peers and enjoy a comparatively high annual salary.

Basic annual salary of communication practitioners in Europe 2017



Development of salaries of top-level communicators

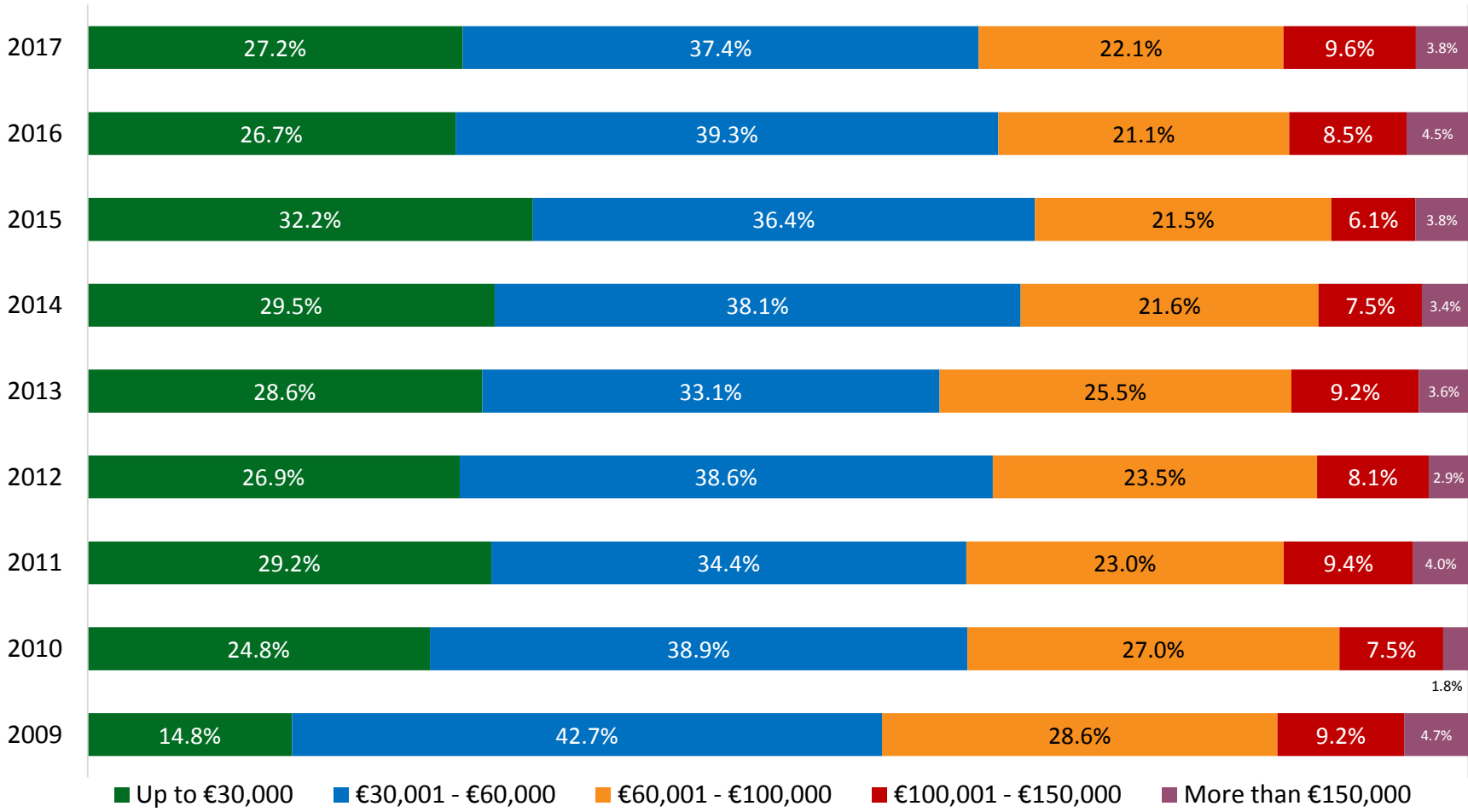
Basic annual salaries (heads of communication / agency CEOs)



www.communicationmonitor.eu / Zerfass et al. 2017 / n = 1,099 heads of communication and agency CEOs; Zerfass et al. 2016 / n = 860 (Q 32); Zerfass et al. 2015 / n = 828 (Q 33); Zerfass et al. 2014 / n = 966 (Q 41); Zerfass et al. 2013 / n = 970 (Q 17); Zerfass et al. 2012 / n = 798 (Q 39); Zerfass et al. 2011 / n = 887 (Q 20); Zerfass et al. 2010 / n = 809 (Q 19); Zerfass et al. 2009 / n = 951 (Q 17). Q 31: In which of the following bands does your basic annual salary fall? Results might be influenced by varying numbers and regional/hierarchical background of respondents in annual surveys.

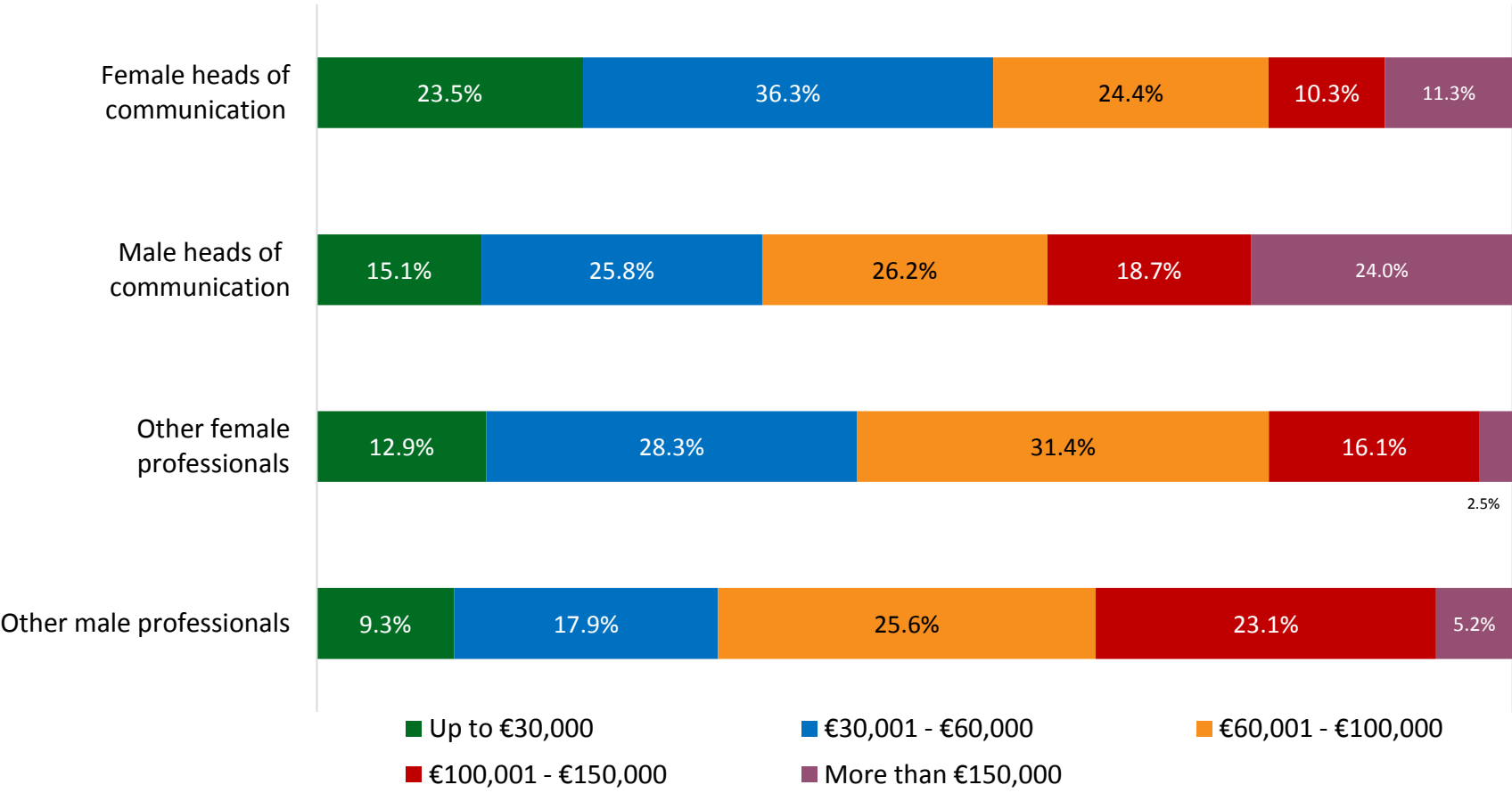
Salary development on other hierarchical levels

Basic annual salaries (unit leaders, team members, consultants)

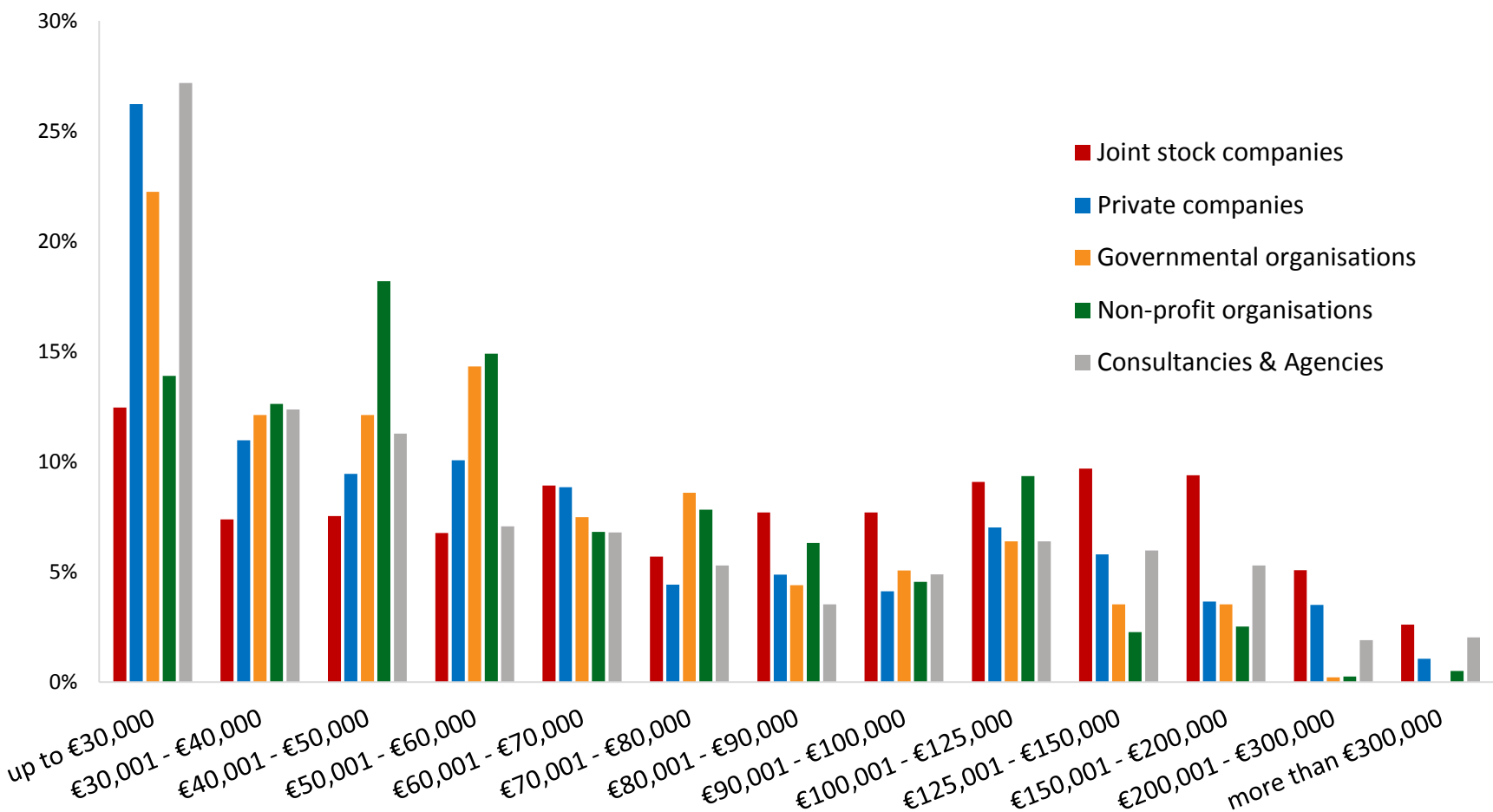


www.communicationmonitor.eu / Zerfass et al. 2017 / n = 1,793 communication professionals below the top level of the hierarchy; 2016 / n = 1,433 (Q 32); Zerfass et al. 2015 / n = 1,067 (Q 33); Zerfass et al. 2014 / n = 1,428 (Q 41); Zerfass et al. 2013 / n = 1,287 (Q 17); Zerfass et al. 2012 / n = 1,013 (Q 39); Zerfass et al. 2011 / n = 927 (Q 20); Zerfass et al. 2010 / n = 879 (Q 19); Zerfass et al. 2009 / n = 817 (Q 17). Q 31: In which of the following bands does your basic annual salary fall? Results might be influenced by varying numbers and regional/hierarchical background of respondents in annual surveys.

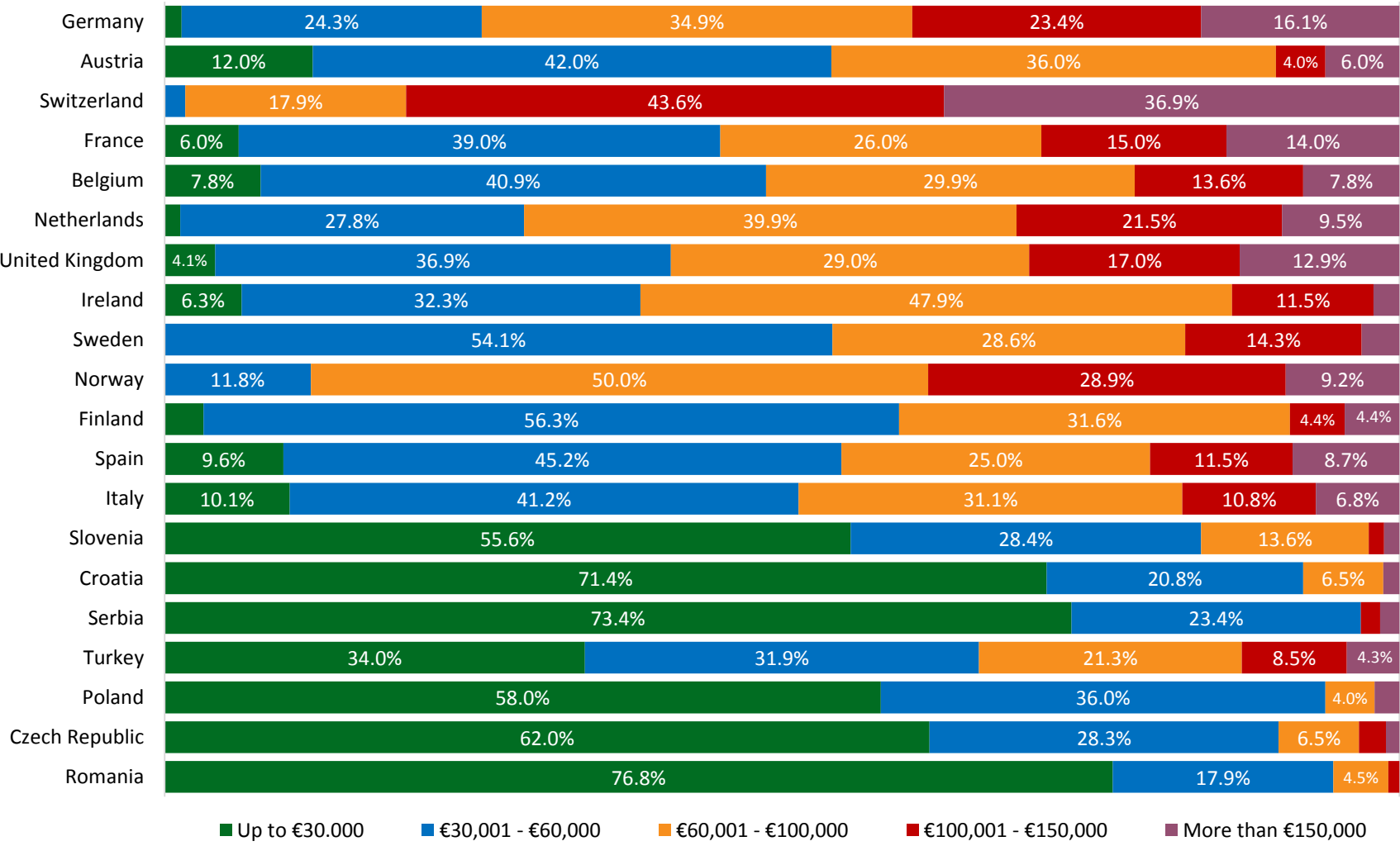
Male communicators earn more than female on the same hierarchical level



Annual salaries for communicators in different types of organisation



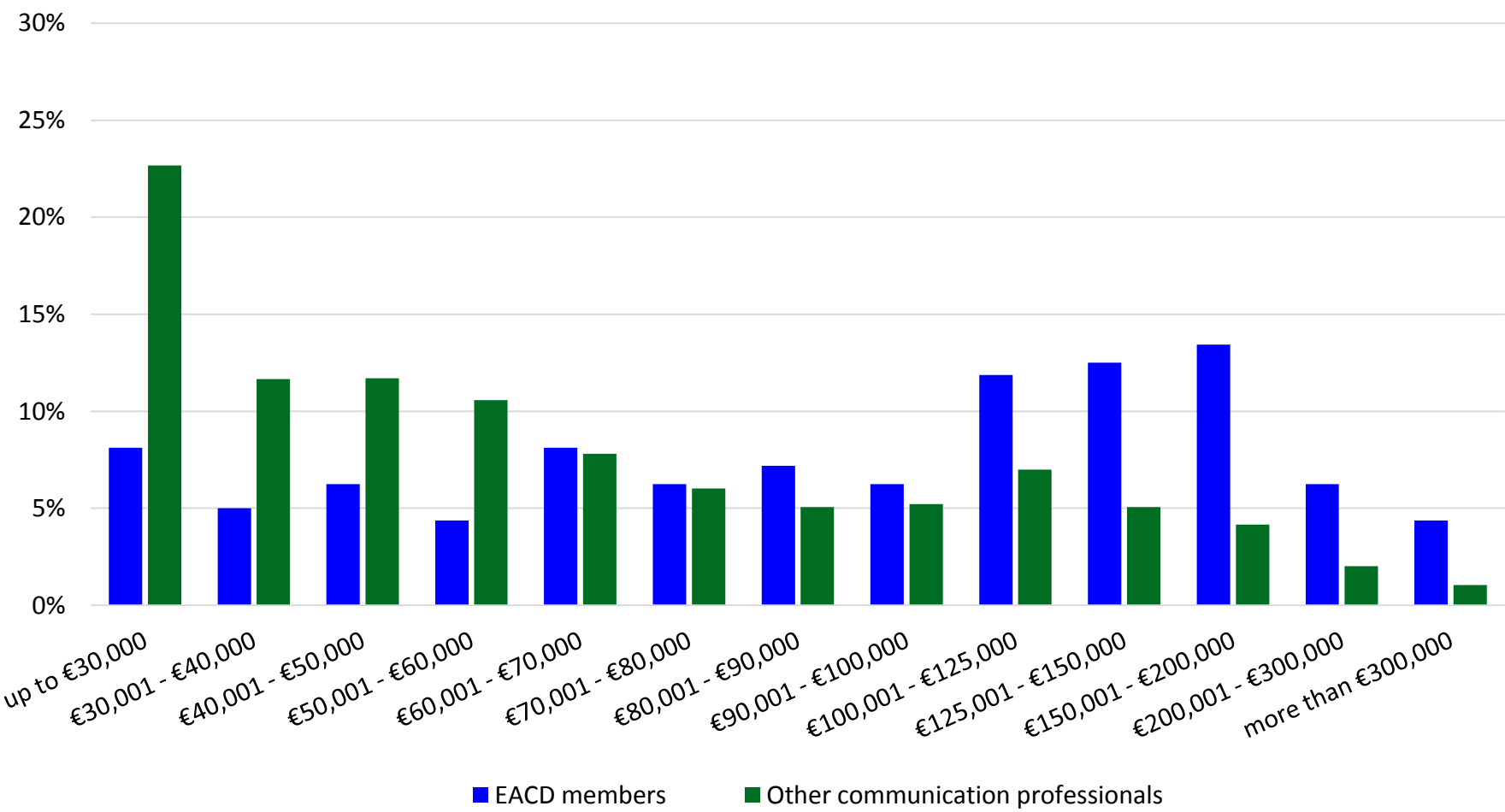
Annual salaries in different European countries



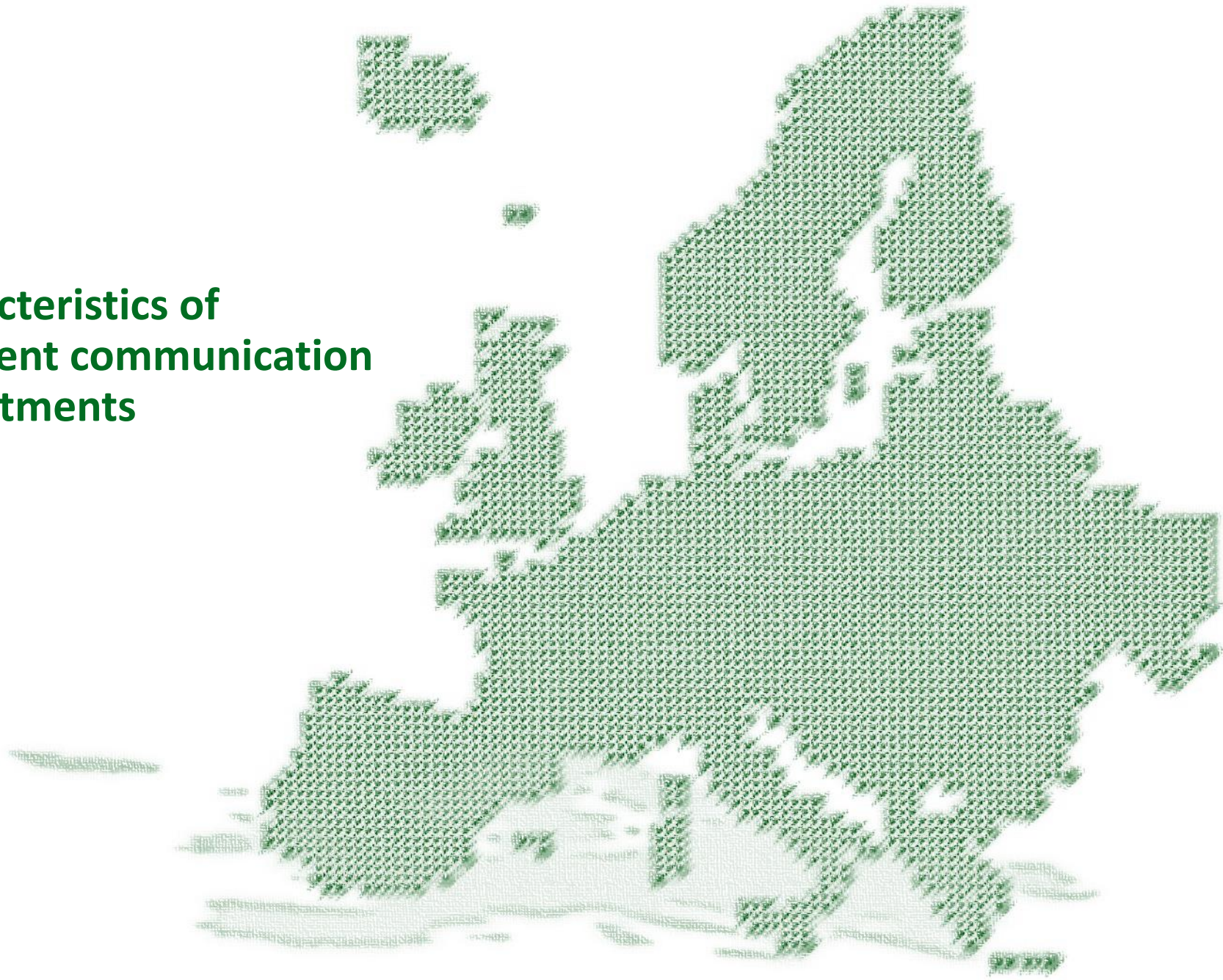
Annual salaries in different European countries in detail

	Up to €30.000	€30,001 - €60,000	€60,001 - €100,000	€100,001 - €150,000	More than €150,000		Up to €30.000	€30,001 - €60,000	€60,001 - €100,000	€100,001 - €150,000	More than €150,000
Germany	1.4%	24.3%	34.9%	23.4%	15.1%	Finland	3.2%	56.3%	31.6%	4.4%	4.4%
Austria	12.0%	42.0%	36.0%	4.0%	6.0%	Spain	9.6%	45.2%	25.0%	11.5%	6.7%
Switzerland	—	1.7%	17.9%	43.6%	31.8%	Italy	10.1%	41.2%	31.1%	10.8%	4.7%
France	6.0%	39.0%	26.0%	15.0%	11.0%	Slovenia	55.6%	28.4%	13.6%	1.2%	—
Belgium	7.8%	40.9%	29.9%	13.6%	6.5%	Croatia	71.4%	20.8%	6.5%	—	—
Netherlands	1.3%	27.8%	39.9%	21.5%	8.2%	Serbia	73.4%	23.4%	—	1.6%	1.6%
United Kingdom	4.1%	36.9%	29.0%	17.0%	11.7%	Turkey	34.0%	31.9%	21.3%	8.5%	—
Ireland	6.3%	32.3%	47.9%	11.5%	2.1%	Poland	58.0%	36.0%	4.0%	—	2.0%
Sweden	—	54.1%	28.6%	14.3%	2.0%	Czech Republic	62.0%	28.3%	6.5%	2.2%	—
Norway	—	11.8%	50.0%	28.9%	6.6%	Romania	76.8%	17.9%	4.5%	0.9%	—

EACD members enjoy a comparatively high annual salary



Characteristics of excellent communication departments



Chapter overview

Excellence in management today stands for “an outstanding practice in managing the organisation and achieving results” (Martin-Castella & Rodriguez-Ruiz, 2008, p. 136). Organisations look for characteristics that contribute to higher performance and benchmark against them to see where they are weak and where they are strong with an aspiration to improve. In Europe, many organisations use the Business Excellence Model proposed by the European Foundation for Quality Management (EFQM), while in the USA they prefer the Malcom Baldrige National Quality Award and in Japan the Deming Application Prize. Over the past years the ECM research team has developed a specific excellence framework for communication practice (Verčič & Zerfass, 2016). We have applied it in our surveys based on self-assessment to identify outstanding communication departments (Zerfass et al., 2014, 2015, 2016). We have then applied statistical analysis to differentiate excellent from non-excellent communication departments, and after obtaining the two groups, we looked at characteristics on which they differ. Key results have been summarised in the Communication Excellence Model to nine dimensions – which we call ‘commandments’ – that every organisation must consider if it is interested in developing and nurturing an excellent communication department (Tench et al., 2017).

Our analysis consistently shows through the years that approximately 20 per cent, or every fifth organisation in our sample, is considered as excellent, while 80 per cent, or four fifths are not. Interestingly a similar ratio of outstanding and normal communication departments has been identified in Latin America and the Asia Pacific regions (Moreno et al., 2015, 2017; Macnamara et al., 2015), where the same method was applied.

For 2017 as well as identifying the characteristics of overall excellence within the framework, we also wanted to consider how influential practitioners were in their organisations. From the sample non-profit organisations came out as having the most influence when looking at criteria for how seriously senior managers take the recommendations of the communication function as well as how likely it is that communicators would be invited to senior-level meetings dealing with organisational and strategic planning. Looking at the competence of communication departments in different sectors, it is clear that governmental organisations are lagging behind their peers in private, joint stock and non-profit organisations. More specifically when asked about overall success of communication in general for the organisation, joint stock companies (45.3 per cent) came out on top.

Looking in more detail about how excellent departments operate inside the organisation, we find that the highest performing departments are better aligned to the executive board. In addition, those excellent departments are more likely to be based within postmodern or hypermodern organisations (52.8 per cent) as discussed earlier in this report. Picking up on other strands from this report we find that excellent departments are using quality management more intensively as well as adopting all kinds of benchmarking approaches. They are also better in implementing management routines for visual communication – a trend whose importance has been recognised to a larger extent. Looking outside the organisation we also find that those excellent departments are more open to external issues and are noticeably more engaged in public debates about current and more general societal issues outside the core business tasks. These insights deepen our understanding of communication excellence and are in line with the nine commandments proposed in the current literature (Tench et al., 2017).

Identifying excellent communication departments

The Comparative Excellence Framework uses statistical analyses to identify outperforming organisations, based on benchmarking and self-assessments known from quality management

EXCELLENCE

Communication departments in organisations which outperform others in the field

INFLUENCE

Internal standing of the communication department within the organisation

PERFORMANCE

External results of the communication department's activities and its basic qualifications

ADVISORY INFLUENCE

(Q20)

Senior managers take recommendations of the communication function (very) seriously

EXECUTIVE INFLUENCE

(Q21)

Communication will (very) likely be invited to senior-level meetings dealing with organisational strategic planning

SUCCESS

(Q22)

The communication of the organisation in general is (very) successful

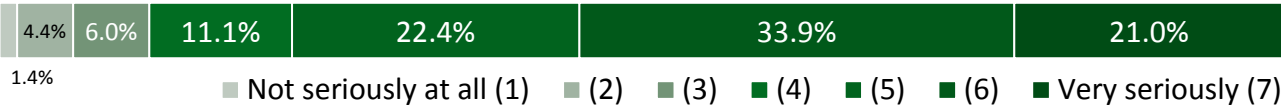
COMPETENCE

(Q23)

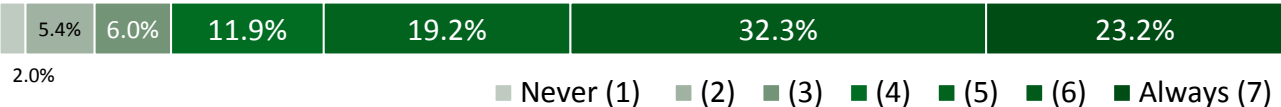
The quality and ability of the communication function is (much) better compared to those of competing organisations

Excellent communication departments

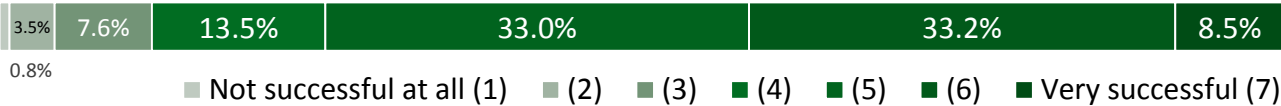
Advisory influence



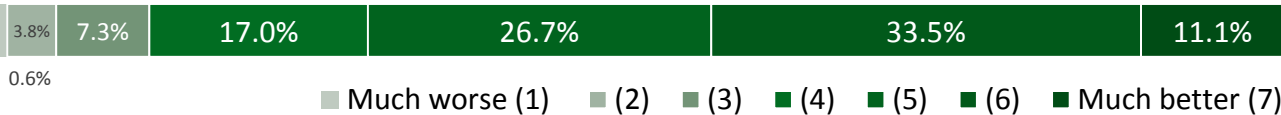
Executive influence



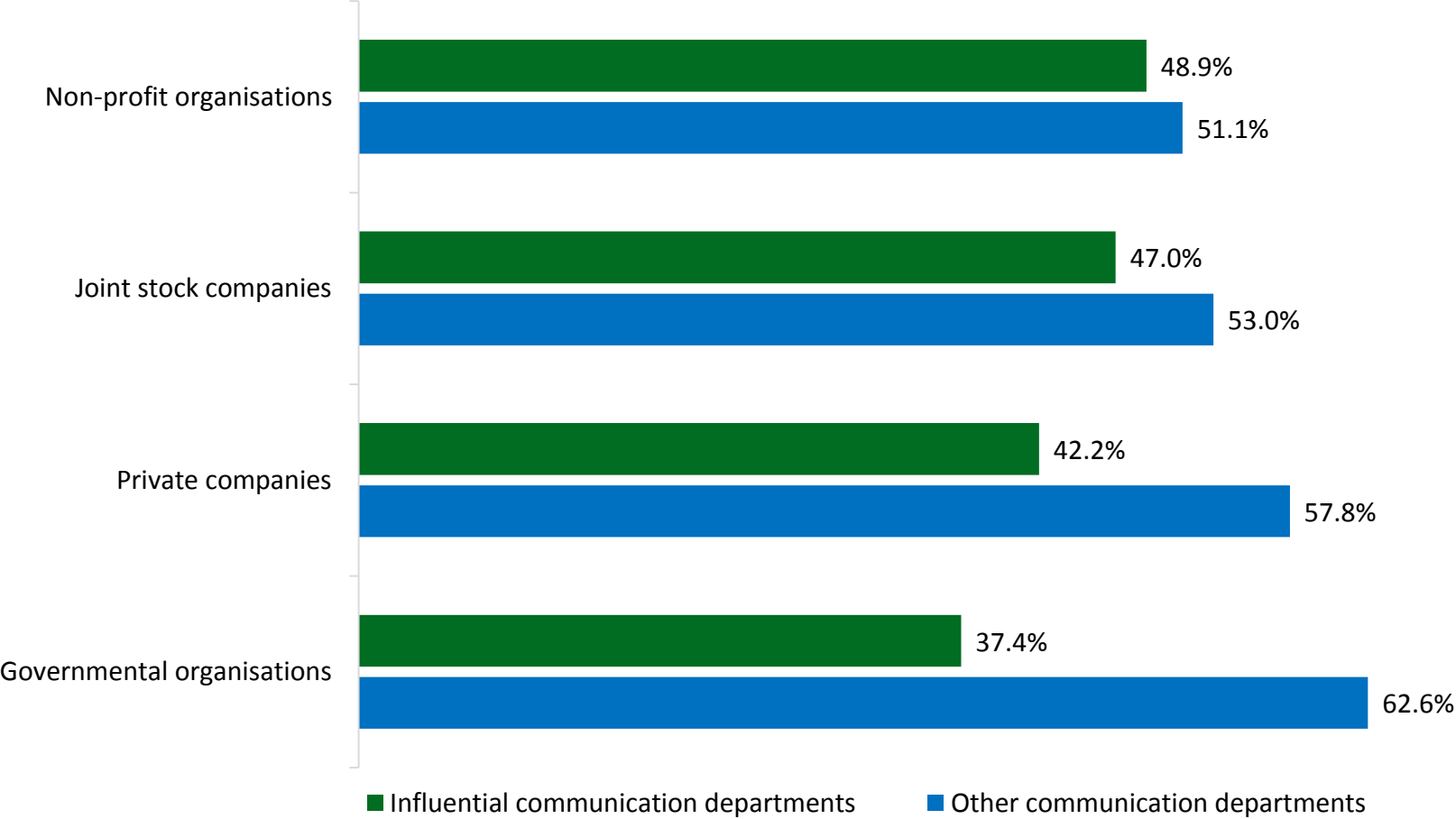
Success



Competence

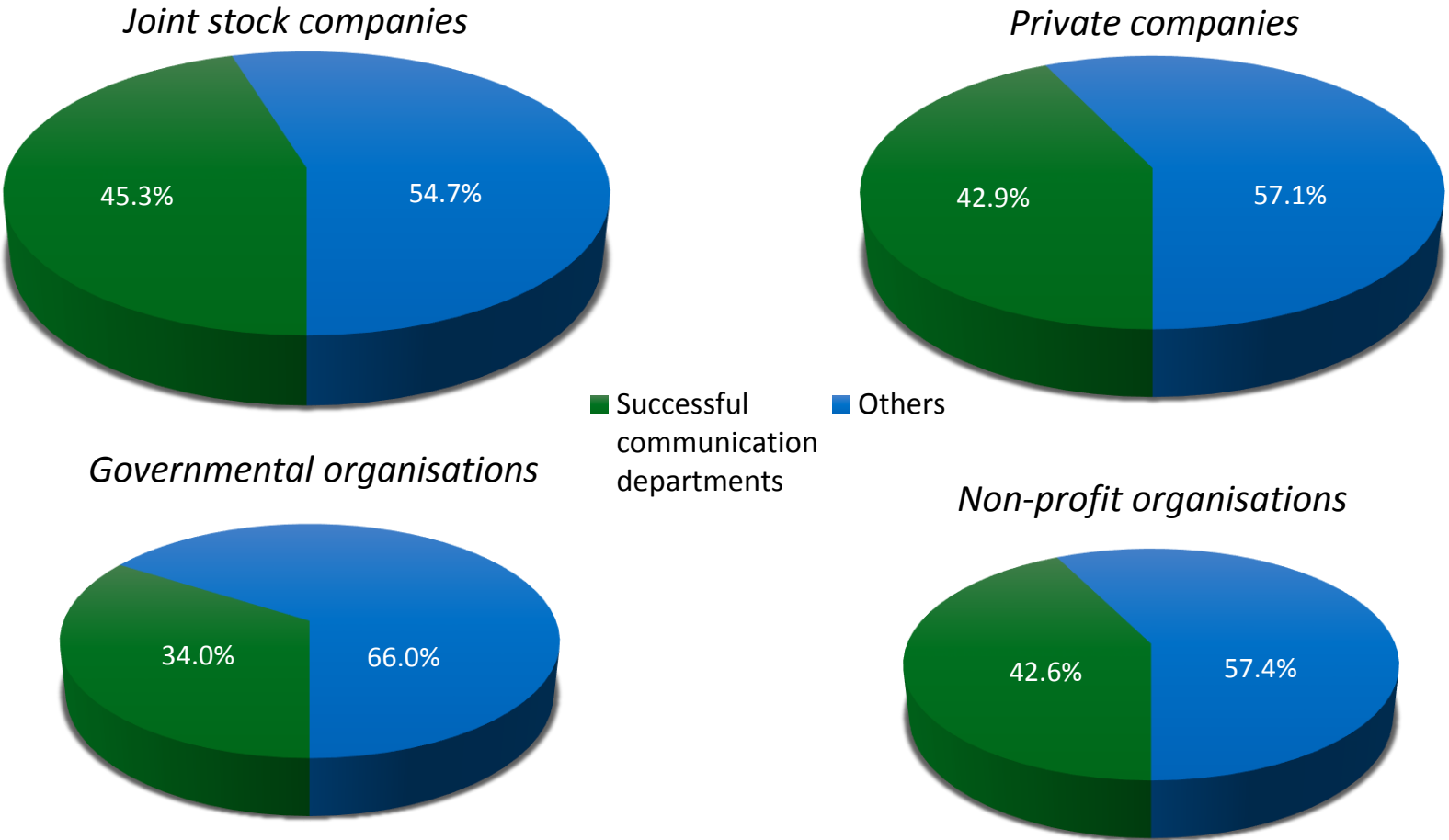


Influential communication departments: Non-profits are leading the field

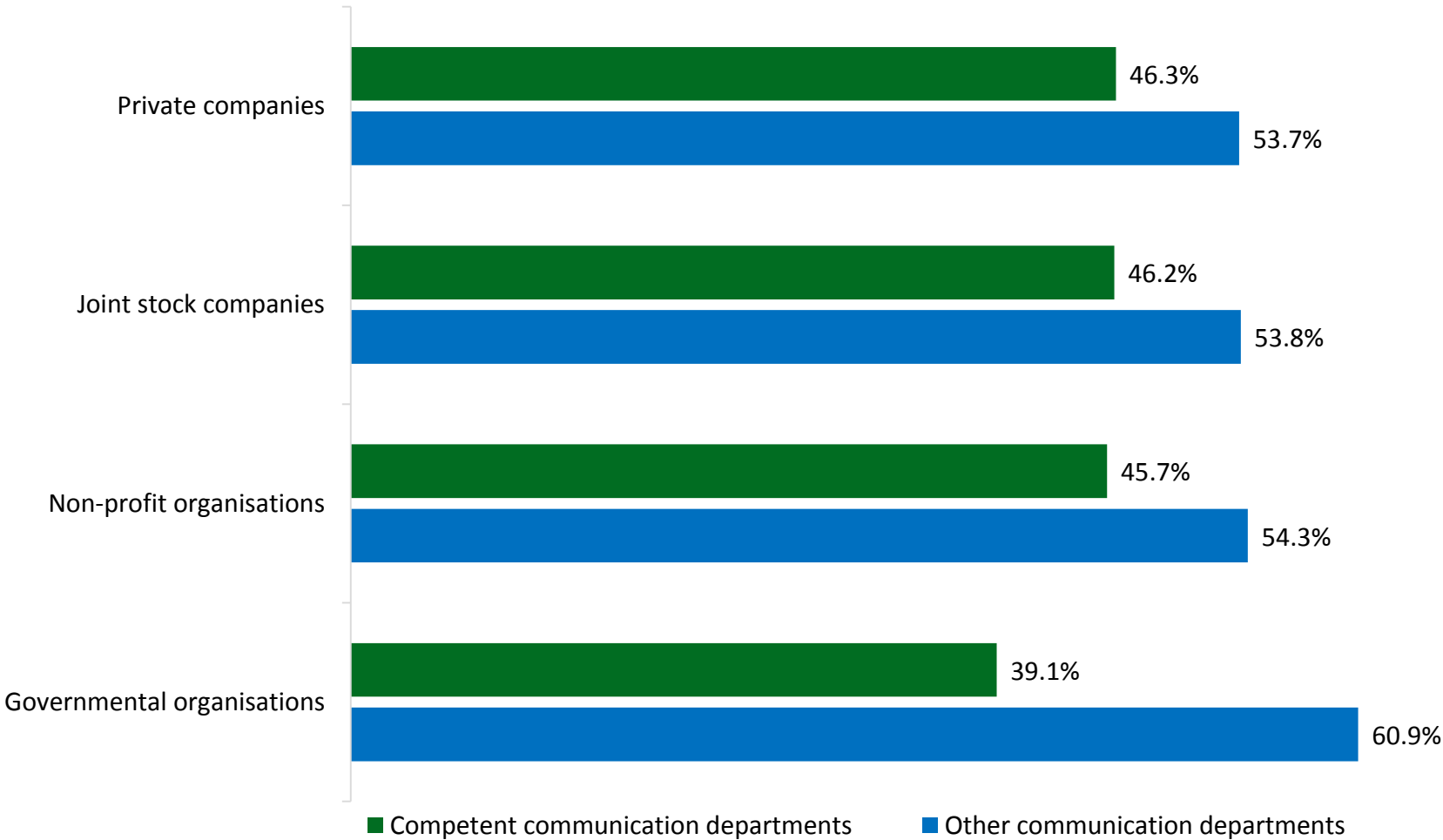


www.communicationmonitor.eu / Zerfass et al. 2017 / n = 2,504 communication professionals in communication departments. Advisory influence, Q 20: In your organisation, how seriously do senior managers take the recommendations of the communication function? Scale 1 (not seriously) – 7 (very seriously). Executive influence, Q 21: How likely is it that communication would be invited to senior-level meetings dealing with organisational strategic planning? Scale 1 (never) – 7 (always). Percentages: Influential communication departments based on scale points 6-7.

Successful communication departments: highest percentage identified in joint stock companies

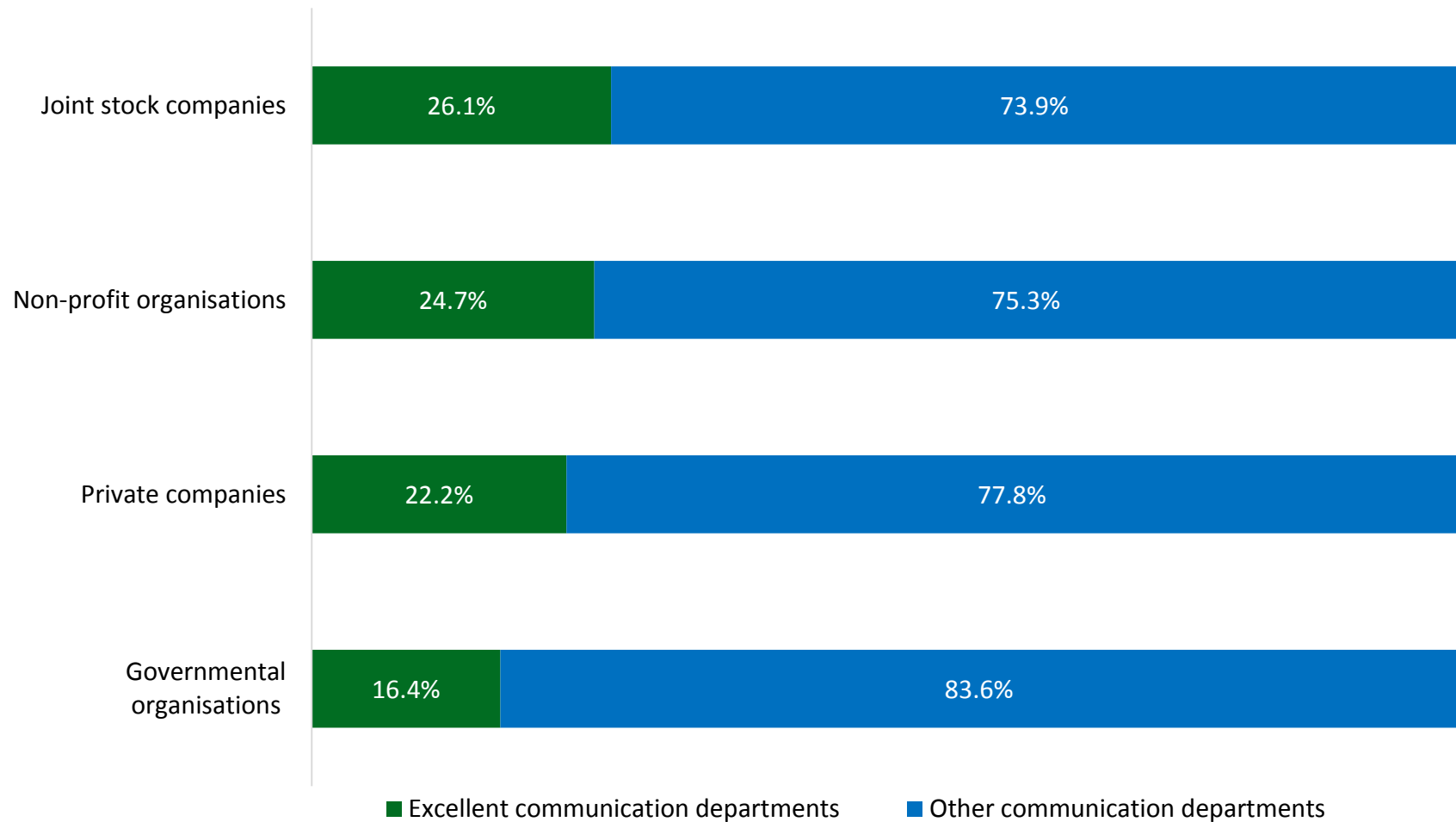


Competence of communication departments:
governmental organisations are lagging behind

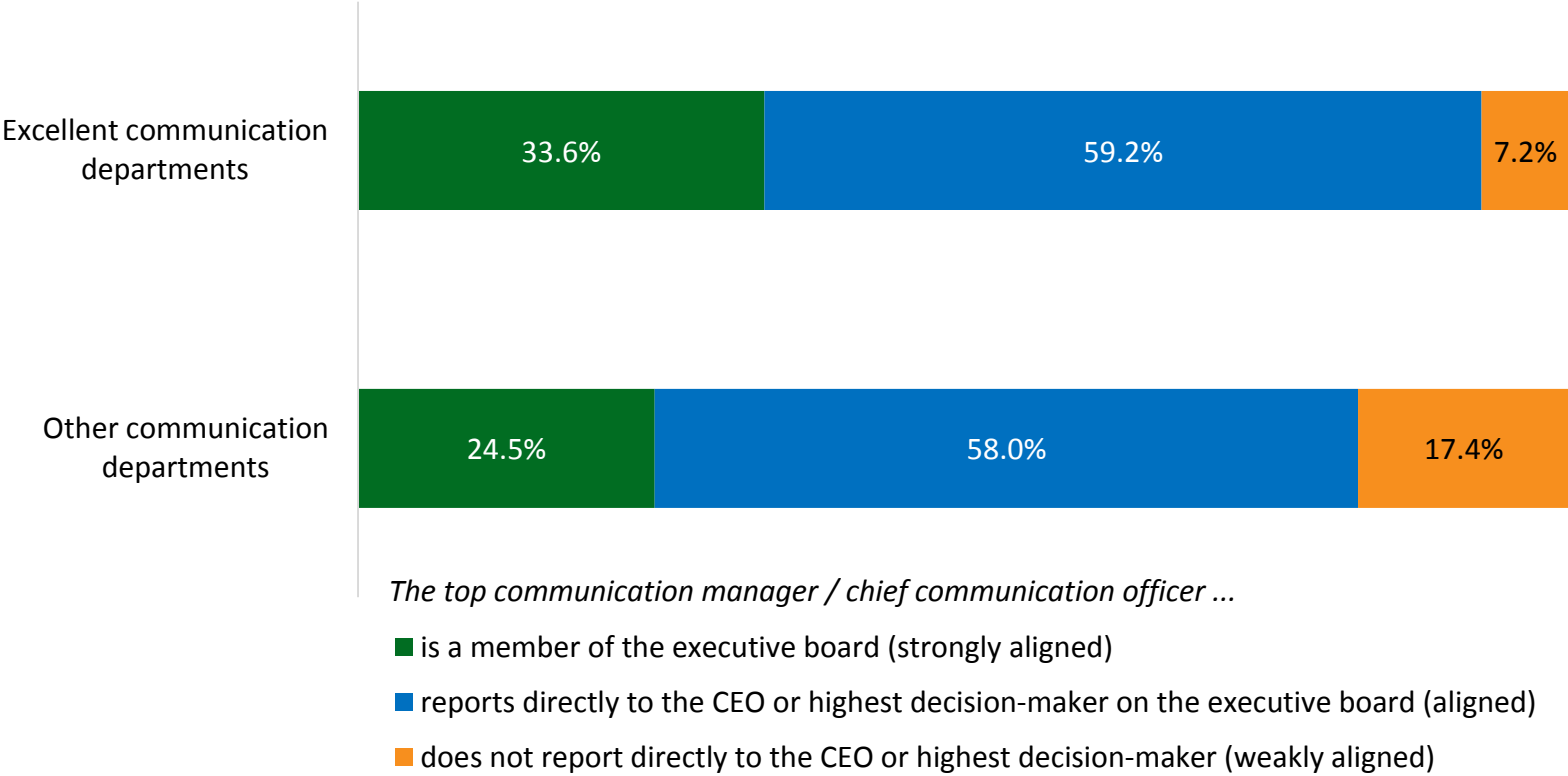


www.communicationmonitor.eu / Zerfass et al. 2017 / n = 2,504 communication professionals in communication departments. Q 23: How would you estimate the quality and ability of the communication function in your organisation compared to those of competitors? Percentages: Competent communication departments based on scale points 6-7.

Excellent communication functions in different types of organisations

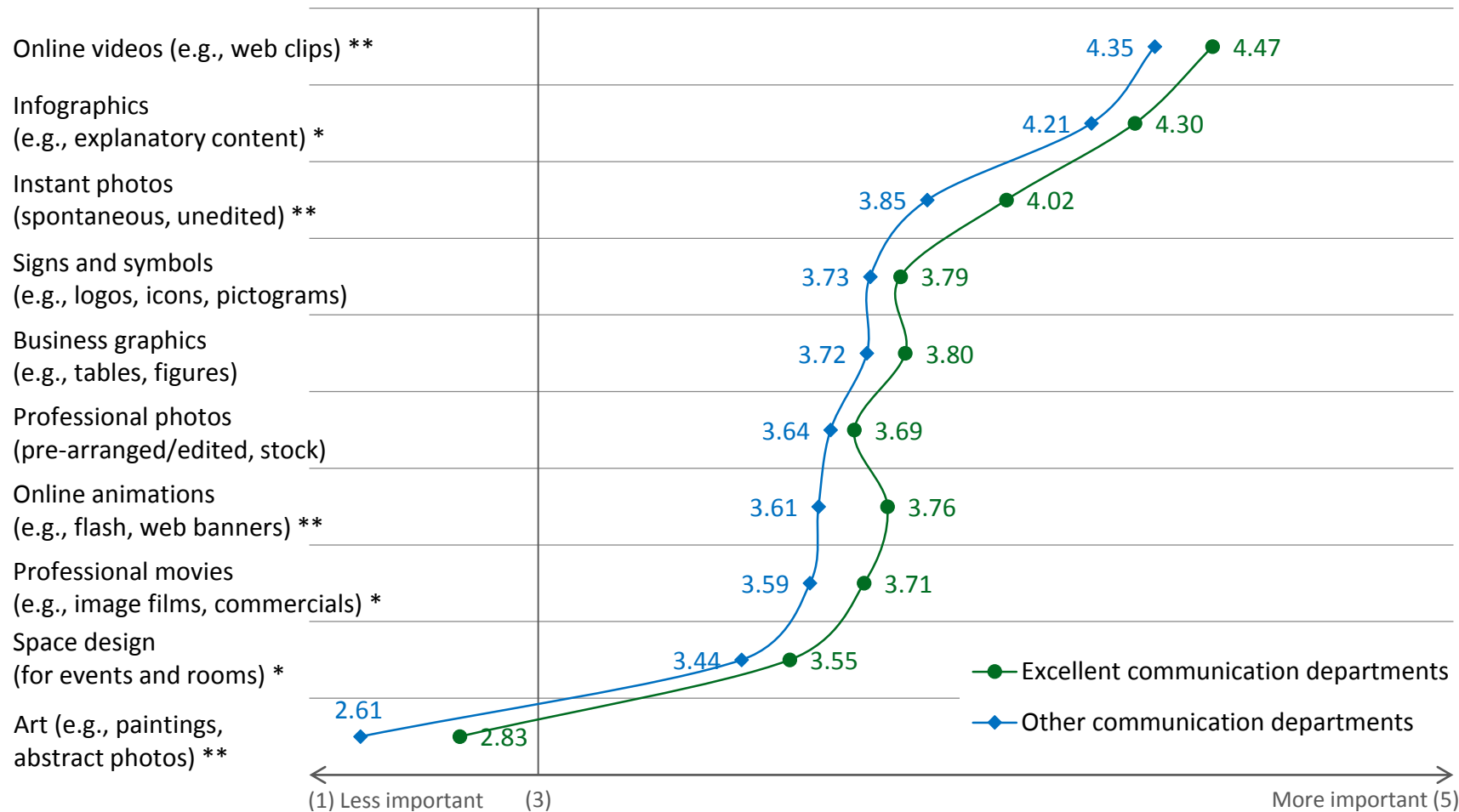


Excellent communication departments are better aligned to the executive board

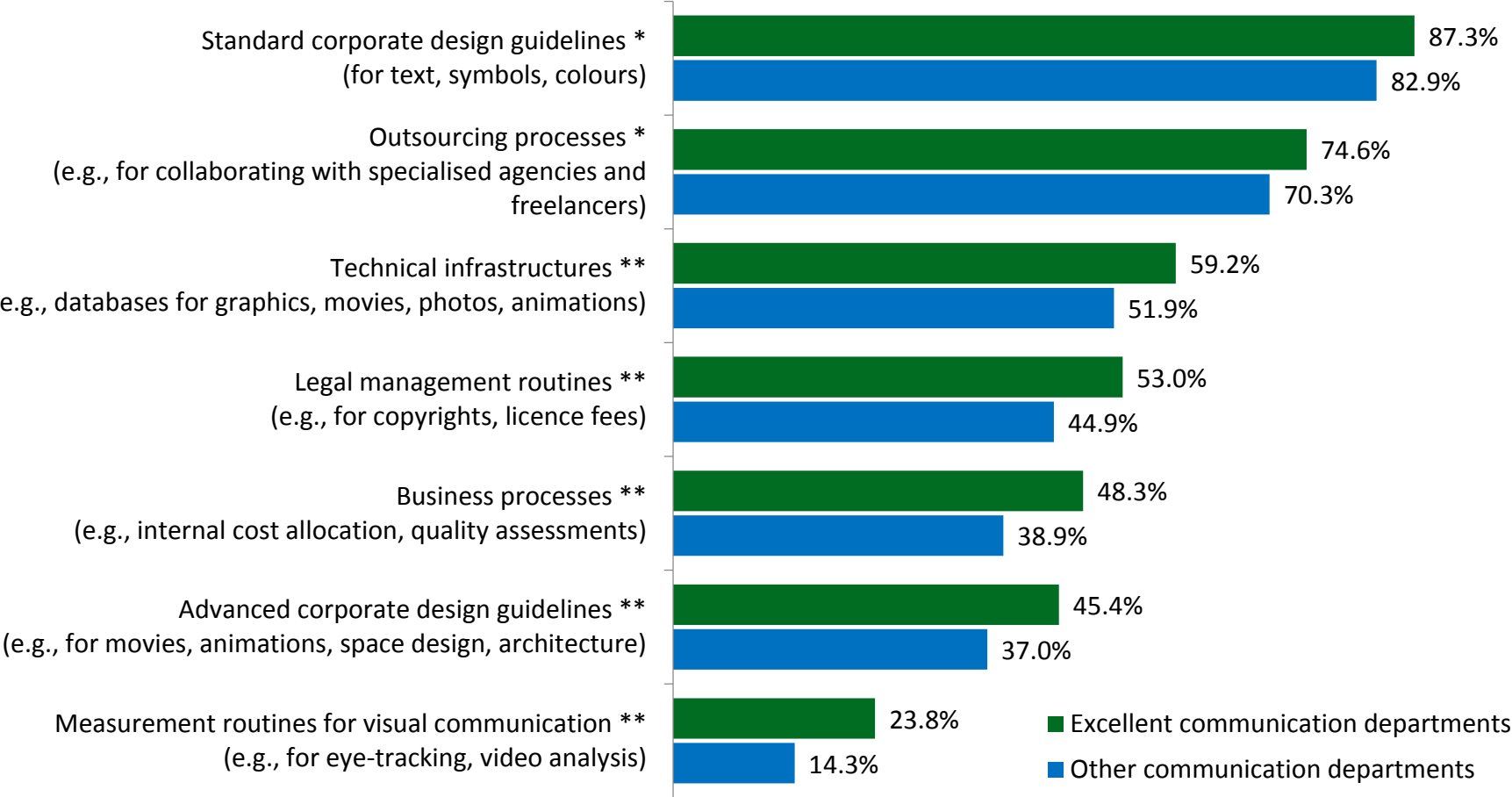


www.communicationmonitor.eu / Zerfass et al. 2017 / n = 2,504 communication professionals in communication departments across Europe. Q 19: Within your organisation, the top communication manager or chief communication officer ... is a member of the executive board (strongly aligned) / reports directly to the CEO or highest decision-maker on the executive board (aligned) / does not report directly to the CEO or highest decision-maker (weakly aligned). Highly significant differences (Kendall rank correlation, $p \leq 0.01$, $\tau = 0.119$).

Visual communication is rated more important by excellent communication departments



Excellent departments are forerunners in implementing management routines for visual communication



www.communicationmonitor.eu / Zerfass et al. 2017 / n = 2,472 communication professionals in communication departments across Europe. Q 3: How does your organisation manage visual communication? Please tick all items that apply for your communication department or agency. We have implemented ...

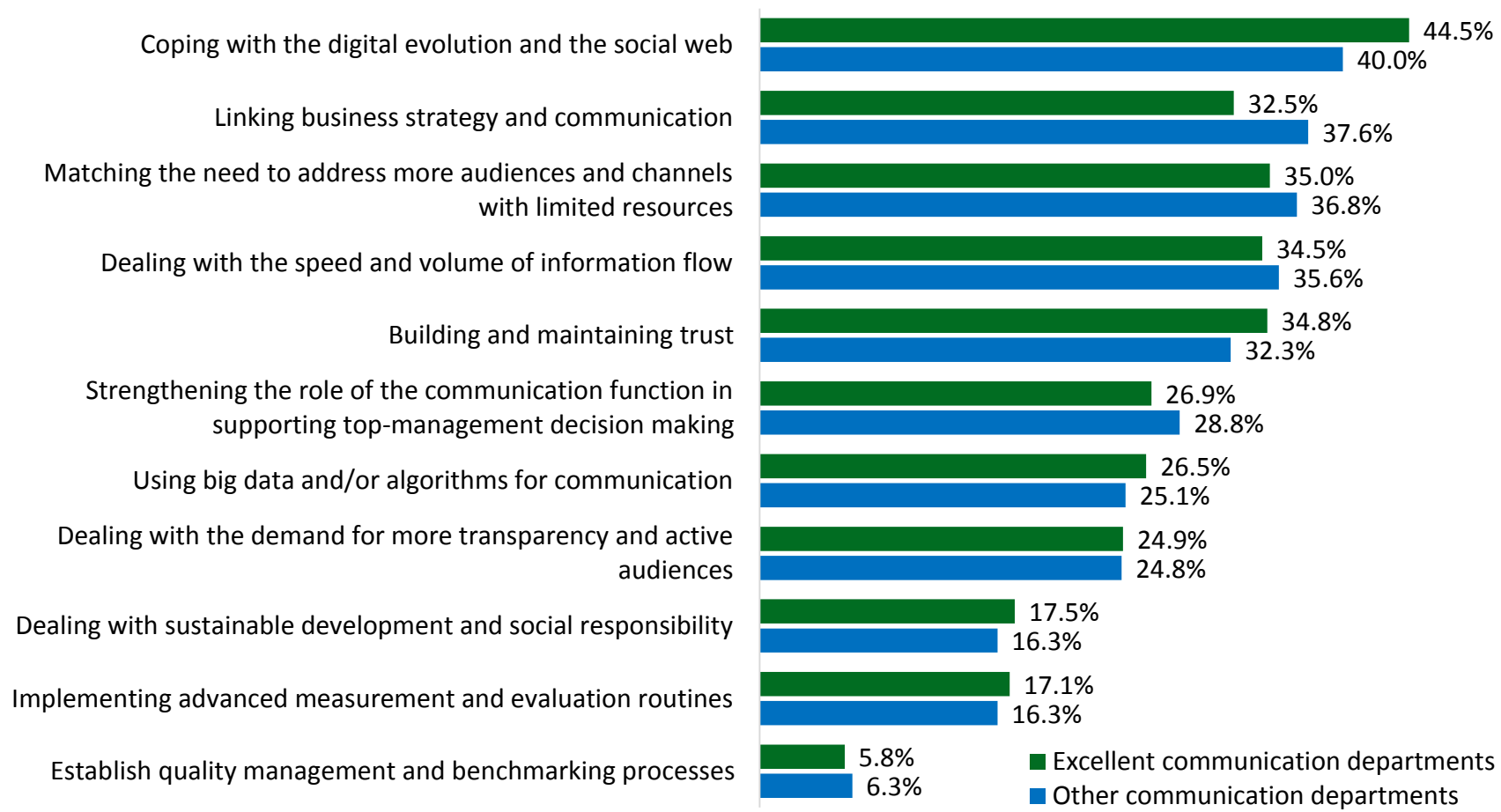
* Significant differences (chi-square test, $p \leq 0.05$). ** Highly significant differences (chi-square test, $p \leq 0.01$).

Practitioners working in excellent department are better qualified in the field of visual communication

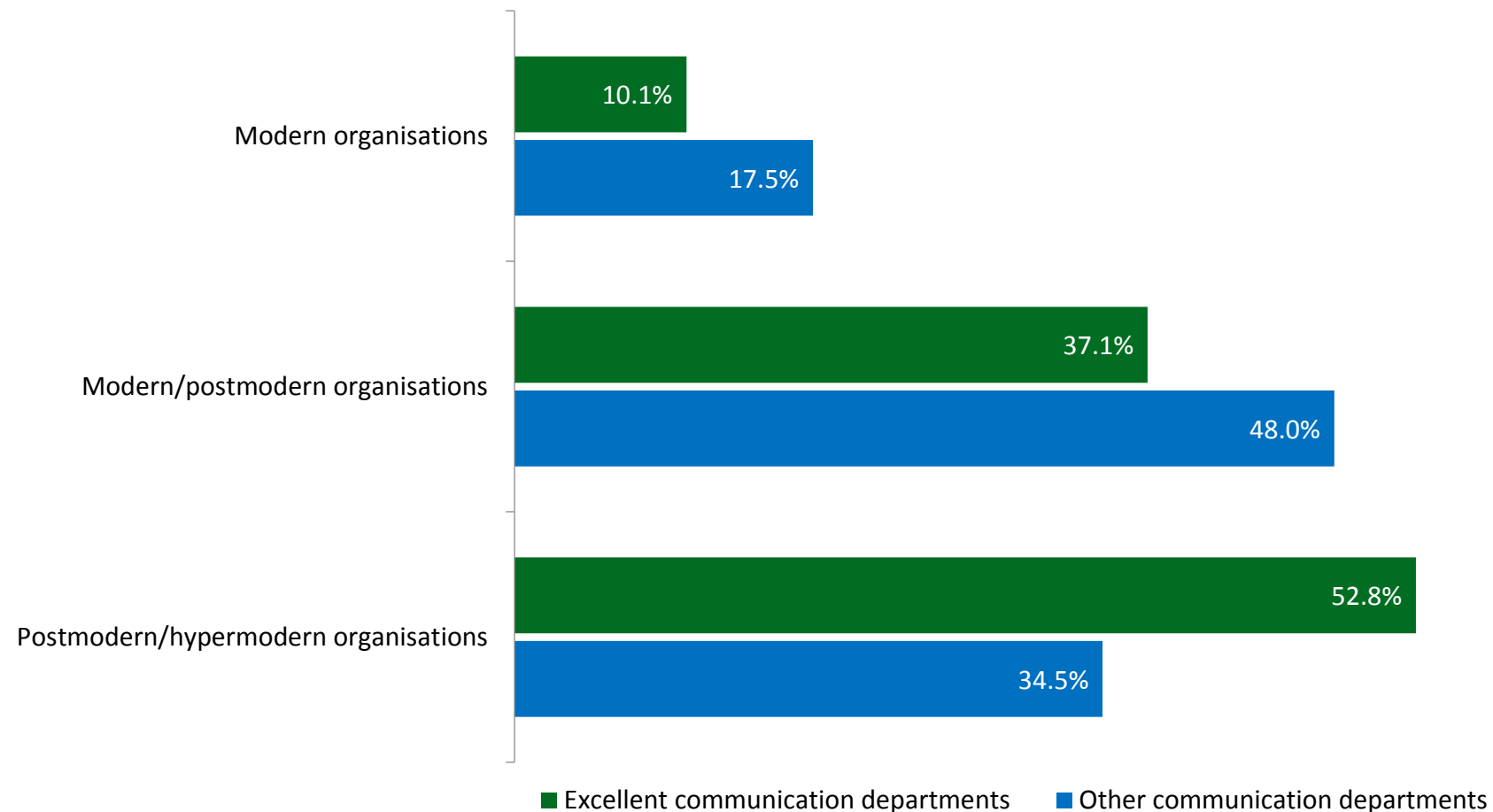
Communication professionals with high capabilities in ...	Excellent communication departments		Other communication departments	
	%	M	%	M
Taking instant photos	68.7%	3.82 *	64.1%	3.71 *
Creating business graphics	31.6% **	2.74 *	25.3% **	2.61 *
Taking professional photos	31.1% *	2.74 *	27.3% *	2.62 *
Shooting online videos	33.6% **	2.79 **	26.4% **	2.57 **
Creating infographics	29.7% **	2.69 **	23.8% **	2.50 **
Editing signs and symbols	23.1%	2.49	21.5%	2.41
Shooting professional movies	17.1%	2.13 *	14.3%	2.01 *
Generating online animations	10.6%	1.90	9.1%	1.81
Designing space (room setup, 3D design)	10.2%	1.90	8.9%	1.82

www.communicationmonitor.eu / Zerfass et al. 2017 / n = 2,504 communication professionals in communication departments. Q 4: How would you rate your personal competencies in the following areas? Scale 1 (No experience at all) – 5 (Very high level experience). Percentages: Frequency based on scale points 4-5. Mean values. * Significant differences for percentages (chi-square test, $p \leq 0.05$). ** Highly significant differences for percentages (chi-square test, $p \leq 0.01$). * Significant differences for means (Pearson correlation, $p \leq 0.05$). ** Highly significant differences for means (Pearson correlation, $p \leq 0.01$).

Aligning communication with business strategy and supporting top management decisions is less challenging for excellent communication departments

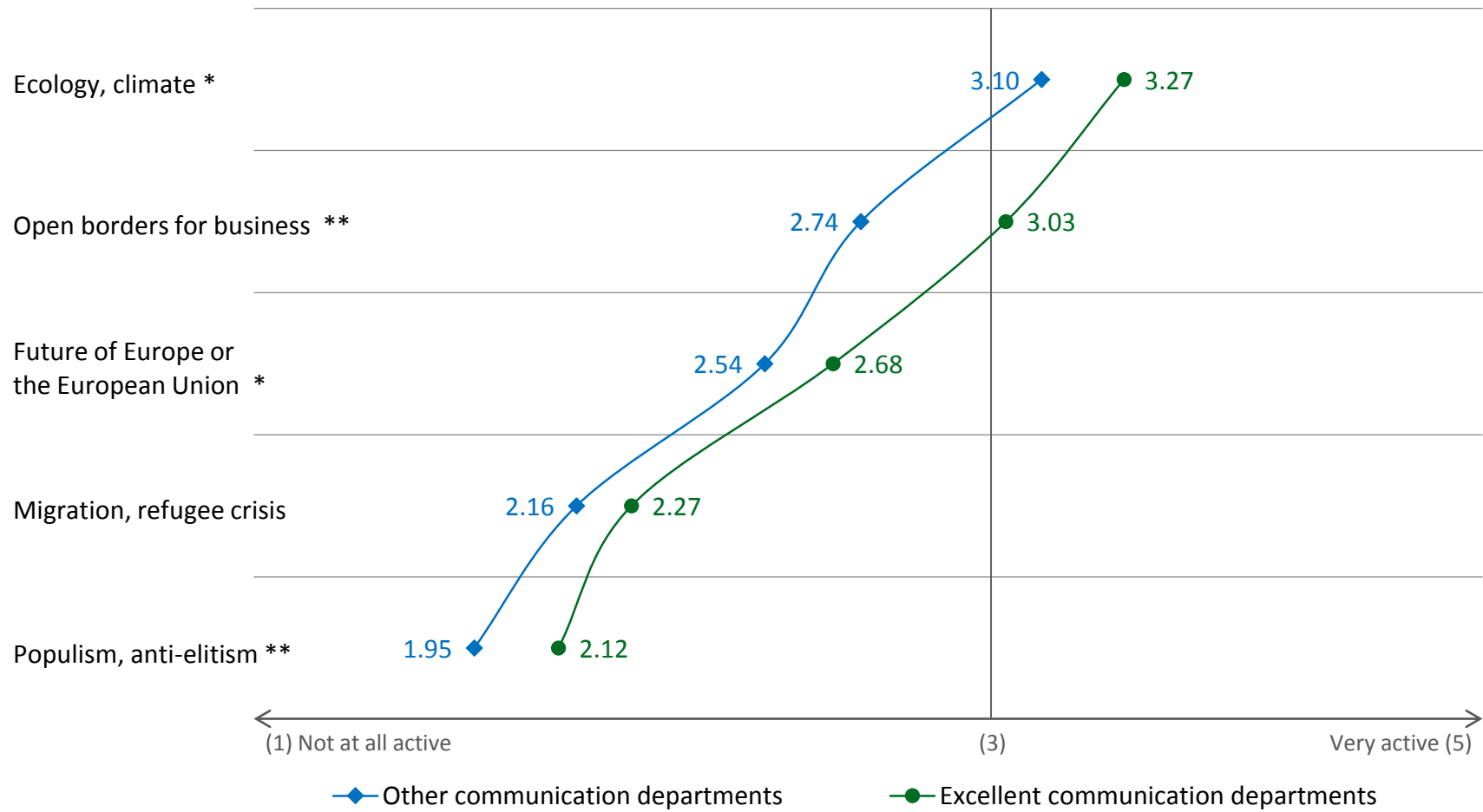


Excellent communication departments are more likely to be based within postmodern/hypermodern organisations



www.communicationmonitor.eu / Zerfass et al. 2017 / n = 2,504 communication professionals in communication departments across Europe. Cluster analysis based on Q 10 (characteristics applied to the organisation, ranging from not at all to very much) and Q 11 (importance of characteristics within the organisation's culture, ranging from not important at all to very important) identified three different groups of respondents. Highly significant differences (chi-square test, $p \leq 0.01$, Cramér's $V = 0.161$).

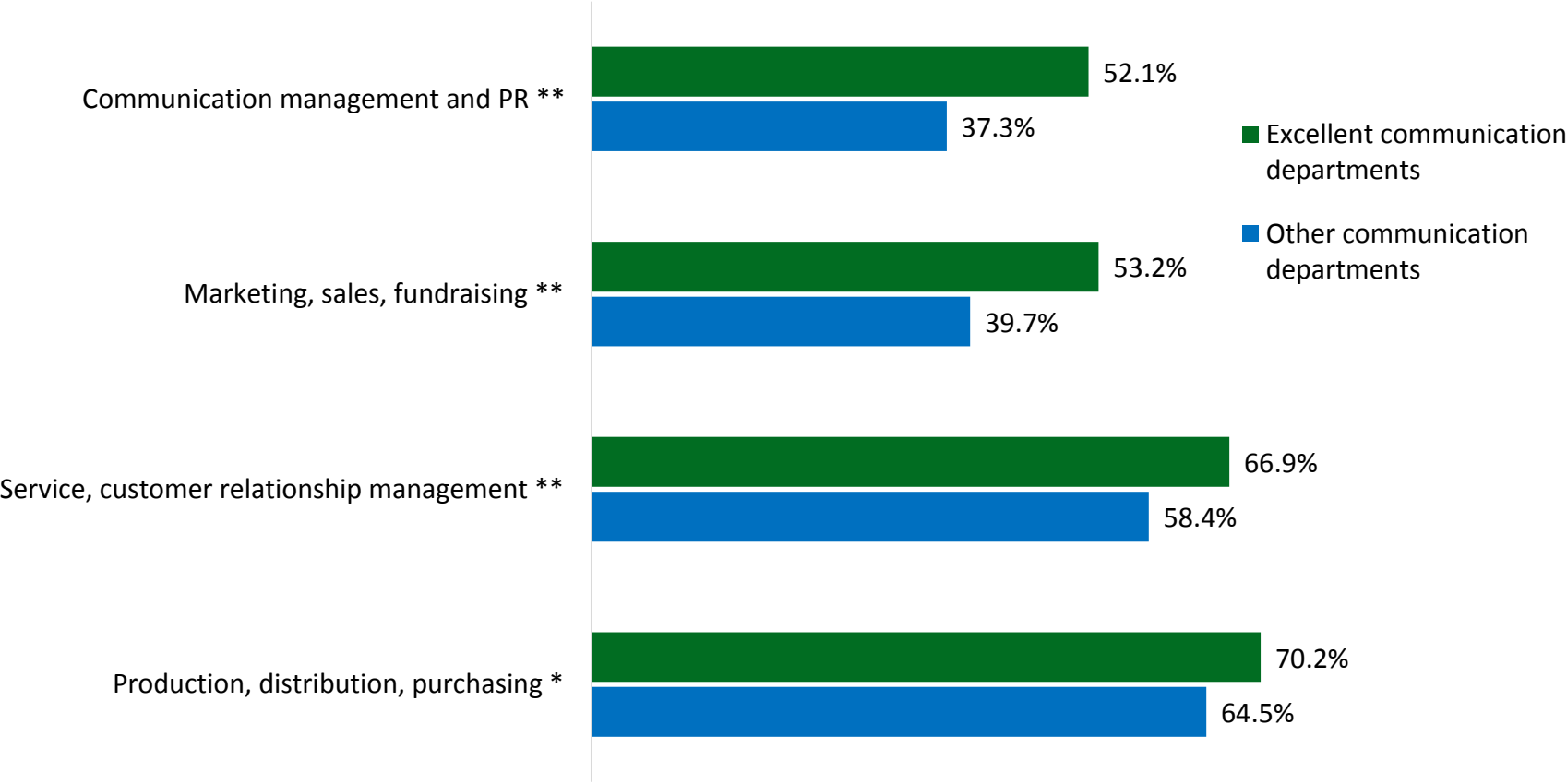
Excellent communication departments are more engaged in public debates about current societal issues



www.communicationmonitor.eu / Zerfass et al. 2017 / n = 2,504 communication professionals in communication departments across Europe. Q 13: To what extent does your organisation actively communicate in the following current societal debates? Scale 1 (Not at all) – 5 (Very active). Mean values. * Significant differences (Pearson correlation, $p \leq 0.05$). ** Highly significant differences (Pearson correlation, $p \leq 0.01$).

Quality management is used more intensively in excellent departments

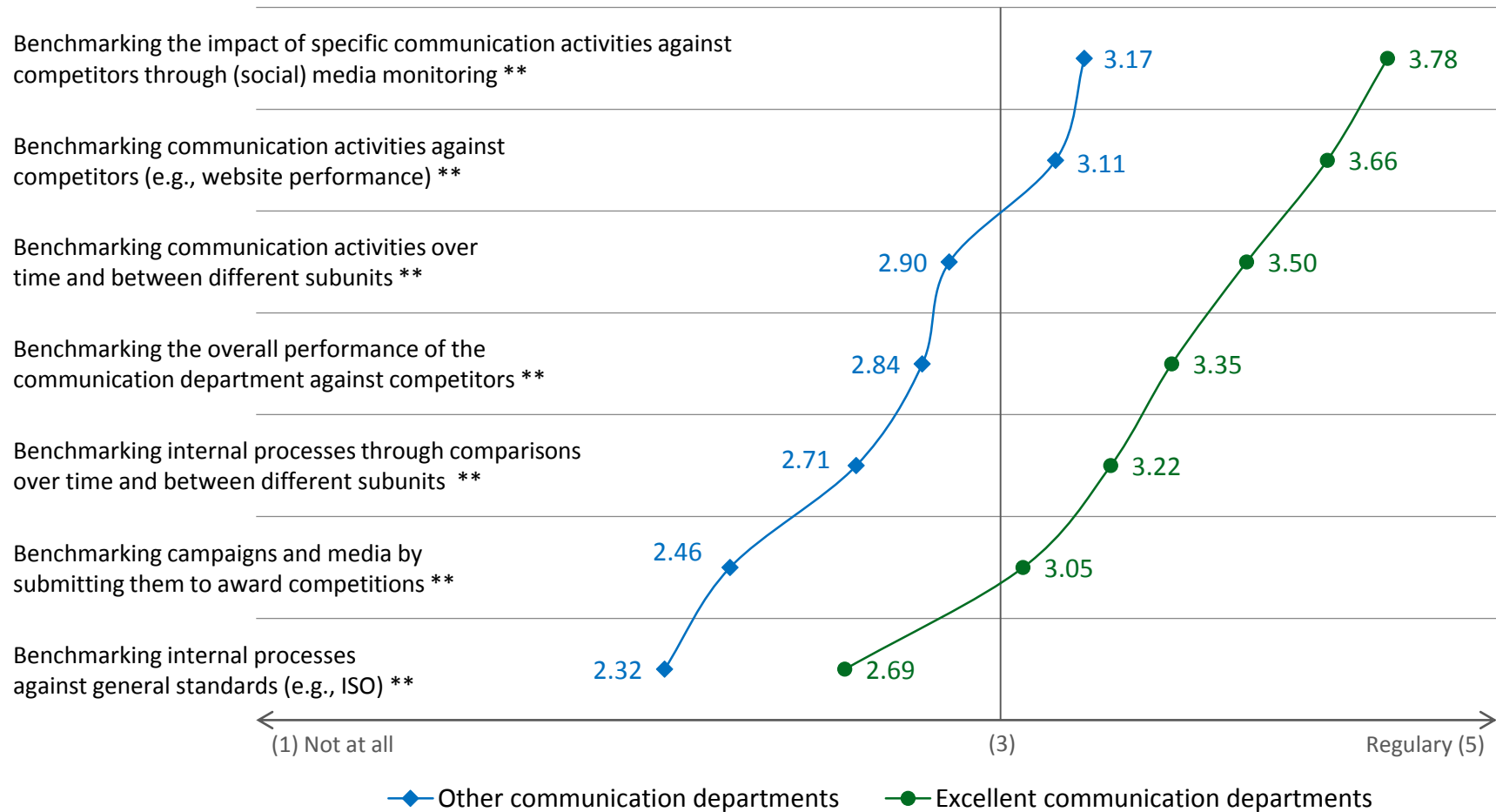
Organisations with certified quality management processes for ...



www.communicationmonitor.eu / Zerfass et al. 2017 / n ≥ 1,953 communication professionals in communication departments across Europe. Q 14: Many organisations use quality management based on benchmarks, audits and certifications (ISO, TQM) to ensure a good performance and continuous improvement of their activities. How does your organisation act in this field? My organisation has certified management processes for ... (Yes, No, Don't know). Percentages: Yes selection.




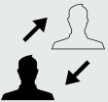
* Significant differences (chi-square test, p ≤ 0.05). ** Highly significant differences (chi-square test, p ≤ 0.01).

Excellent communication departments use all kinds of benchmarking approaches more intensively



www.communicationmonitor.eu / Zerfass et al. 2017 / n = 2,231 communication professionals in communication departments across Europe. Q 15: To what extent does your organisation actively communicate in the following current societal debates? Scale 1 (Not at all) – 5 (Very active). Mean values.
** Highly significant differences (Pearson correlation, $p \leq 0.01$).

Perceived contributions of communication departments but also demands of top management are rated higher in excellent departments

Contributions of the communication department to overall success ...		Excellent communication departments		Other communication departments	
		Contribution	Demand	Contribution	Demand
	convincing (critical) key stakeholders of the organisational strategy	86.6% **	57.7% *	64.7% **	48.2% *
	communicating the organisational strategy to all stakeholders	89.9% **	76.6% *	79.3% **	67.9% *
	translating the organisational strategy into a fully aligned communication strategy	91.7%	77.1% **	81.9%	68.1% **
	supporting operational goals and processes of other departments through communication activities	90.8%	81.0%	85.3%	75.0%
	the constant improvement and further development of the department	93.7%	67.6% **	83.0%	57.4% **
	the daily management of the department (e.g., planning, budgeting, allocating resources)	90.4%	74.0%	85.3%	67.5%
	consulting on the strategic development of the organisation (e.g., by explaining communicative opportunities and risks)	91.5%	68.4% **	74.8%	54.8% **
	coaching and enabling top management and other departments to communicate professionally	85.3% **	68.0% **	70.6% **	56.2% **

www.communicationmonitor.eu / Zerfass et al. 2017 / n ≥ 834 heads of communication departments. Q 18: Communication departments can contribute to the overall success of organisations in many different ways, but top management does not always ask for all of these contributions. Perceived contributions: Item “The strategic/operational contribution of my department includes ...”. Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5. Perceived demand: Item “Demanded by our top management”. Percentage: Frequency based on agreement. Highly significant differences for all items (chi-square test, p ≤ 0.01).

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More information

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