

EUROPEAN COMMUNICATION MONITOR 2018

STRATEGIC COMMUNICATION AND THE
CHALLENGES OF FAKE NEWS, TRUST, LEADERSHIP,
WORK STRESS AND JOB SATISFACTION
RESULTS OF A SURVEY IN 48 COUNTRIES.

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STRATEGIC COMMUNICATION AND THE CHALLENGES OF FAKE NEWS,
TRUST, LEADERSHIP, WORK STRESS AND JOB SATISFACTION.
RESULTS OF A SURVEY IN 48 COUNTRIES.

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

A study conducted by the European Public Relations Education and Research Association (EUPRERA) and the European Association of Communication Directors (EACD), supported by partners PRIME Research, Fink & Fuchs and Communication Director magazine. 2nd Edition

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Foreword



Building and maintaining trust combined with the ongoing impact of fake news on our profession are of particular urgency for the European Association of Communication Directors. These are among the key issues covered by this year's European Communication Monitor - its twelfth edition since its first appearance in 2007. Last year, the EACD published a Manifesto Against Fake News, recognising it as one of the most important challenges facing communicators today and to reiterate our founding values of ethical and responsible communications. Results from this year's monitor back up our decision to take this step, with figures showing that the majority of communicators follow the debate on fake news (65.5%). Only 12% have established advanced protocols should it be the source of fake news. The EACD hosts workshops with gripping case studies to prepare communicators for a barrage of disinformation via traditional or social media.

Another crucial topic covered by this year's monitor is the flow of information from communication teams to decision makers. Today's media landscape requires communication professionals to react promptly via multiple media channels. The study delivers crucial findings on the practices that all modern departments must develop to retain a competitive edge. Currently, only 36% of communication specialists compile daily social media monitoring reports, which is likely to become an even more highly desirable need in the years to come.

The EACD provides a network that enables career progression and stay up to date in the profession. The monitor shows that we're on the right track with this, given that career opportunities are a deciding factor in job satisfaction. When their direct report cannot offer communicators suitable progression, our members can find support in our international cross-functional network. As a multi-level association, we are proud to run events open to members at all levels in their career to foster knowledge exchange.

I invite you to explore the monitor's findings on the following pages, which provides fascinating insights into the ever-changing communication function and the skills required for a dynamic operating environment.

A handwritten signature in black ink that reads "Inge Wallage".

Inge Wallage

Managing Director, European Association of Communication Directors

Introduction



Business leaders and those in charge of other organisations across Europe have to deal with a volatile environment. The threat of global trade wars makes it difficult to navigate towards the future. Communication experts can support organisations in different ways. They can provide value for organisations by identifying and delivering up-to date information based on monitoring media and stakeholders. They can deliver curated executive news services. They can deal with fake news and protect reputation. And they can help to establish and regain trust – which was rated the most important challenge in the near future in this year's European Communication Monitor. Trusted content, trusted leaders and trusted organisations are a rock in the surf in today's media environment.

This edition of our study is based on responses from 3,096 communication professionals working in companies, non-profits, governmental organisations and agencies from 48 European countries. It provides additional detailed analyses for 22 countries. Moreover, parts of the data will be matched with results from the bi-annual Asia-Pacific, Latin American and the new North-American Communication Monitor. Altogether, more than 80 countries are covered by the Global Communication Monitor series, making it the only truly global study of its kind worldwide.

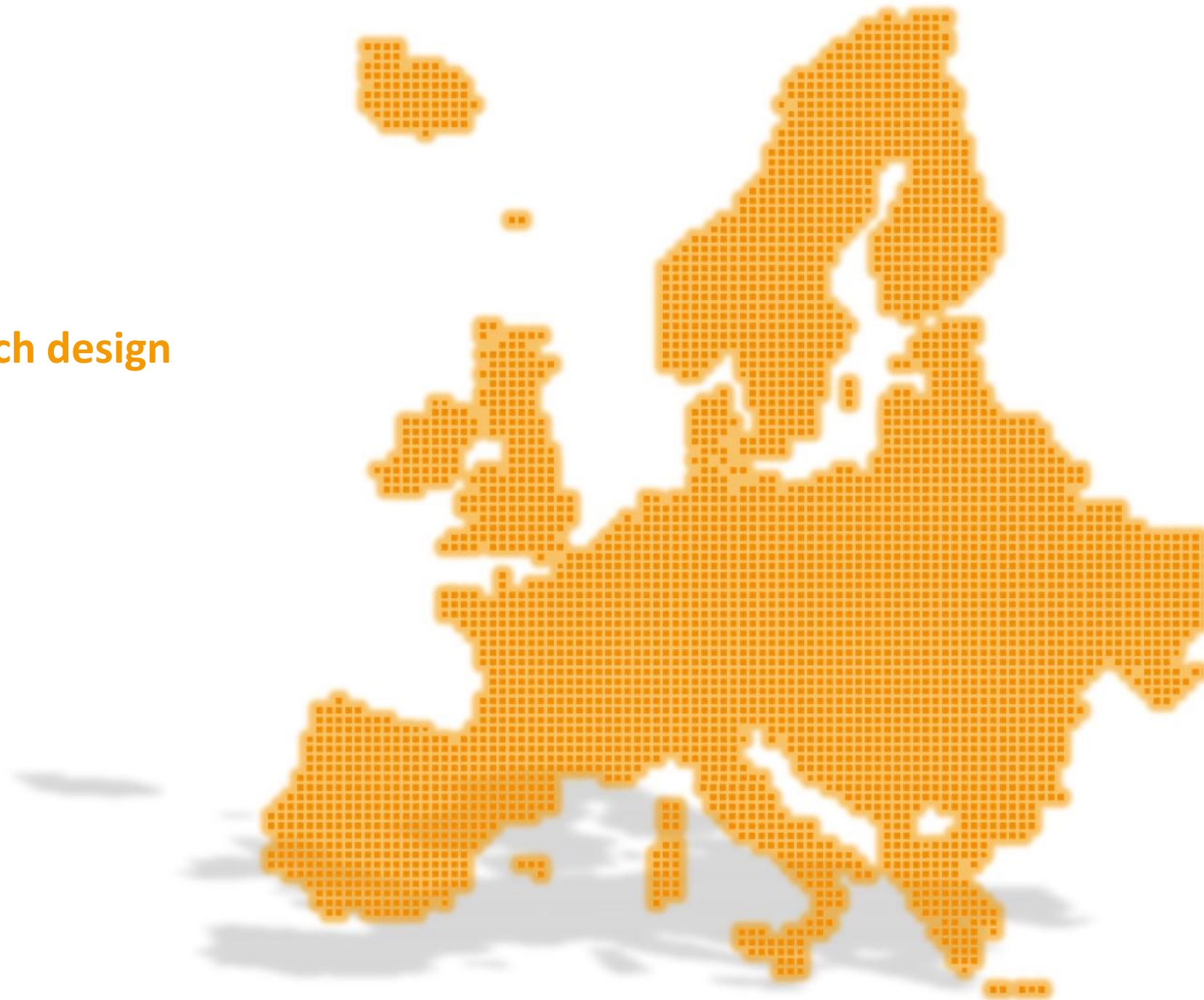
The survey explores communications' contributions to organisational success as well as the work environment for communication professionals in Europe. Work engagement and stress, job satisfaction and its drivers and the status of leadership in communication units are explored in detail. Once again, characteristics of excellent communication departments are identified. This adds new aspects to the insights presented in our book 'Communication Excellence' (see page 146).

On behalf of the research team, I would like to thank all professionals who participated in the survey. The support by our premium partner PRIME Research, a member of the Cision Group, and digital communications partner Fink & Fuchs is much appreciated. Many thanks to our national partner BI CCC in Norway and all national collaborators at renowned universities across Europe, to Juan Meng, Markus Wiesenberger and Ronny Fechner, and the EACD team.

Prof. Dr. Ansgar Zerfass

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

Research design



Research design

The European Communication Monitor (ECM) 2018 explores current practices and future developments of strategic communication in companies, non-profits and other organisations including communication agencies across Europe. This is the 12th annual edition of a survey that has been conducted since 2007. A joint project 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 partners PRIME Research, Fink & Fuchs, and Communication Director magazine.

The study is complemented by other surveys covering five continents and more than 80 countries altogether. The Global Communication Monitor series includes the annual European study and bi-annual studies in North America (Reber et al., 2018), Latin America (Moreno et al., 2015, 2017, 2019) and Asia-Pacific (Macnamara et al., 2015, 2017). It has been initiated and is led by Ansgar Zerfass. The ECM is co-authored by Ralph Tench, Piet Verhoeven, Dejan Verčič, and Ángeles Moreno. 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 2018 is based on responses from 3,096 communication professionals from 48 European countries. They have answered a comprehensive questionnaire which collects a large number of independent and dependent variables in a unique research framework (see page 12): 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 study is based on consistent foundational constructs from the field of strategic communication (Falkheimer & Heide, 2018; Holtzhausen & Zerfass, 2015; Nothhaft et al., 2018). For 2018 several contemporary challenges are empirically tested. The survey delves into the world of fake news (Hou, 2017; Tandoc et al., 2018), information provision to decision-makers and top managers as a contribution to organisational success (Mykkänen, 2017; The Economist Group & Hill+Knowlton Strategies, 2016), leadership and organisational culture (Berger & Meng, 2014; Falkheimer, 2014), work engagement and trust (Bailey et al., 2017), questions of working practice and stress experiences at work (Ganster & Rosen, 2013; Siegrist, 2010), job satisfaction (Chen & Arvey, 2016) and once again a further exploration of the characteristics of what makes communication practitioners and departments excellent (Tench et al., 2017).

Importantly for this year the study also shares learnings from other international studies on the performance of communications, specifically the Leadership Report Card developed by The Plank Center for Leadership in Public Relations (Berger et al., 2015, 2017).

In order to track the longitudinal development of the field, several questions from previous ECM surveys (Zerfass et al., 2007-2017) have been repeated. The research design combined with the subject themes in this edition supports a broad range of evaluations and interpretations which expand the body of knowledge for strategic communication.

Methodology and demographics



Methology and demographics

The online questionnaire used for the European Communication Monitor 2018 consisted of 39 questions. Five 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 70 communication professionals in 23 European countries. Amendments were made where appropriate and the final questionnaire was activated for five weeks in February/March 2018. More than 40,000 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.

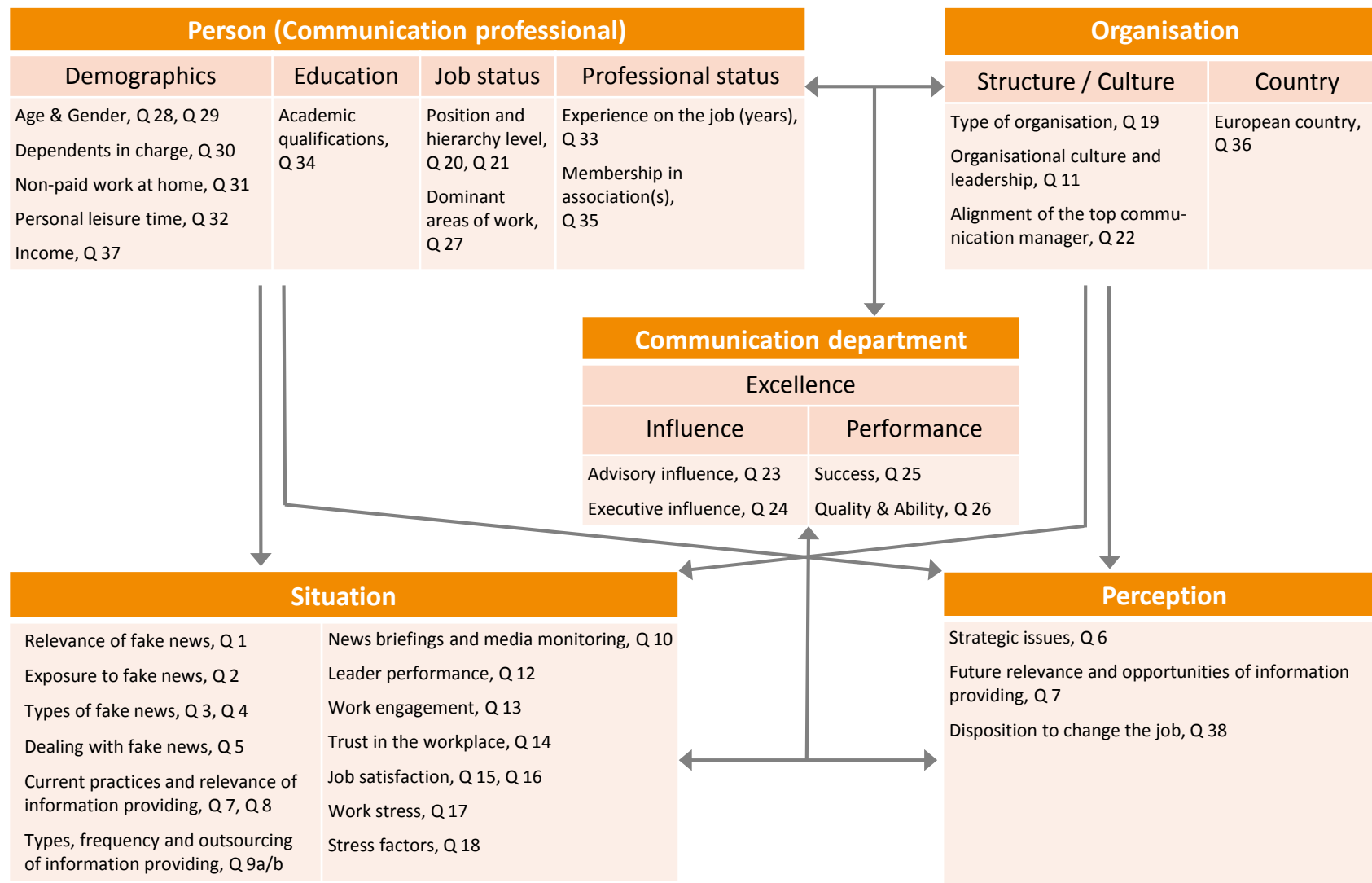
In total 7,291 respondents started the survey and 3,341 of them completed it. Answers from participants who could not clearly be identified as part of the population were deleted from the dataset. This strict selection of respondents is a distinct feature of the ECM and sets it apart from many studies 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 3,096 fully completed replies by communication professionals in Europe.

The Statistical Package for the Social Sciences (SPSS) was used for data analysis. We used cluster analyses to identify groups of entities which share similar characteristics. Regression analyses were applied to develop and test linear models predicting selected variables and effects. Depending on the variable type the results have been tested for statistical significance and (inter)dependencies (Chi², ANOVA / Scheffe Post-hoc-Test, independent samples T-Test, Pearson correlation and Kendall rank correlation). Statistical indicators (Cramer's V, F, r, RMSEA, Tau) are reported in the footnotes for significant results and marked with asterisks in the figures and tables: * for significant ($p \leq 0.05$) and ** for highly significant ($p \leq 0.01$) differences.

The demographics show that seven out of ten respondents are communication leaders: 36.8 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. 65.3 per cent of the professionals interviewed have more than ten years of experience in communication management. This reveals the high quality of the sample. 58.1 per cent of all respondents are female and the average age is 41.3 years. A vast majority (94.8 per cent) in the sample has an academic degree. 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, 20.9 per cent; private companies, 22.7 per cent; government-owned, public sector, political organisations, 19.0 per cent; non-profit organisations, associations, 10.8 per cent), while 26.6 per cent are communication consultants working freelance or for agencies.

Communication professionals from 48 European countries participated in the survey. Detailed insights were calculated for 22 key markets. Most respondents (30.2 per cent) are based in Southern Europe (countries like Italy, Spain, Portugal), followed by Western Europe (29.7 per cent; countries like Germany, Belgium, Netherlands, Switzerland, France), Northern Europe (24.2 per cent; countries like United Kingdom, Sweden, Finland, Norway), and Eastern Europe (16.0 per cent; countries like Romania, Czech Republic, Poland, Russia).

Research framework and questions



Demographic background of participants

Position

Head of Communication, Agency CEO	36.8%
Responsible for single communication discipline, Unit leader	30.4%
Team member, Consultant	27.7%
Other	5.1%

Organisation

Communication department in a		
▪ joint stock company	20.9%	} 73.4%
▪ private company	22.7%	
▪ government-owned, public sector, political organisation	19.0%	
▪ non-profit organisation, association	10.8%	
Communication consultancy, PR agency, freelance consultant		26.6%

Job experience

More than 10 years	65.3%
6 to 10 years	17.0%
Up to 5 years	17.7%

Alignment of the communication function

Strongly aligned communication department	29.9%
Aligned communication department	56.7%
Weakly aligned communication department	13.5%

Personal background of respondents

Gender / Age

	Overall	Head of communication, Agency CEO	Team leader, Unit leader	Team member, Consultant
Female	58.1%	50.8%	58.1%	64.6%
Male	41.9%	49.2%	41.9%	35.4%
Age (on average)	41.3 yrs	45.6 yrs	41.5 yrs	37.4 yrs

Membership in a professional association

European Association of Communication Directors (EACD)	12.0%
Other international communication association	11.4%
National PR or communication association	43.9%

Highest academic educational qualification

Doctorate (Ph.D., Dr.)	6.4%
Master (M.A., M.Sc., Mag., M.B.A.), Diploma	63.1%
Bachelor (B.A., B.Sc.)	25.3%
No academic degree	5.2%

Countries and regions represented in the study

Respondents are based in 48 European countries and four regions

Western Europe 29.7% (n = 919)	Northern Europe 24.2% (n = 748)	Southern Europe 30.2% (n = 934)	Eastern Europe 16.0% (n = 495)
Belgium Germany Netherlands Switzerland France Austria Luxembourg Liechtenstein Monaco	United Kingdom Sweden Finland Norway Ireland Denmark Latvia Lithuania Estonia Iceland	Italy Spain Portugal Slovenia Croatia Serbia Turkey Greece Bosnia and Herzegovina Macedonia Cyprus Malta Montenegro Albania Andorra Kosovo San Marino Vatican City	Romania Czech Republic Poland Russia Ukraine Bulgaria Hungary Slovakia Georgia Armenia Belarus

**Responding to reality:
Fake news and trust**



Chapter overview

Fake news is a zeitgeist media term, but are we taking it all too seriously? Isn't it, as some proponents suggest, just entertainment – a prank, hoax or satire? The more serious questions are of course: What does fake news (really) mean? What is the potential impact on organisations? And what is the role of communication professionals, departments and agencies in generating, facilitating or propagating fake news? Recent experiences of political elections being influenced (Cadwalladr, 2017), attacks on corporations (Hou, 2017), and the interference of organised data management and communication strategies (e.g., by Cambridge Analytica) have fuelled the concern that fake news might be subversive and potentially dangerous.

A review of previous studies that have used the term fake news reveals six types of definition: (1) news satire, (2) news parody, (3) fabrication, (4) manipulation, (5) advertising, and (6) propaganda (Nielsen & Graves, 2017; Tandoc et al., 2018). What is common across these definitions is how fake news appropriates the look and feel of real news: from how websites look, to how articles are written, to how photos include attributions. Fake news hides under a veneer of legitimacy as it takes on some form of credibility by trying to appear like traditionally trusted content. By misappropriating the credibility of curated media, fake news might also undermine journalism's legitimacy, especially in a social media environment when the actual source of information often gets removed (Kang et al., 2011).

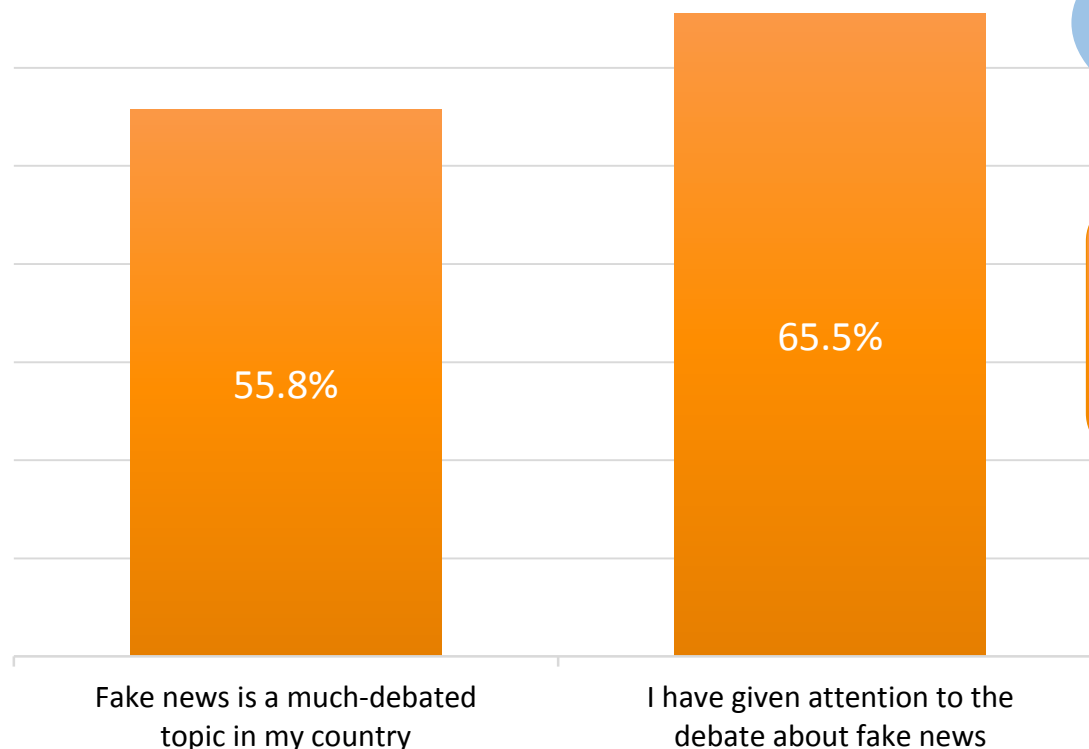
In this year's ECM we explored how communication professionals are encountering the phenomenon. The findings demonstrate that fake news is clearly debated across Europe with the majority of respondents (65.5 per cent) themselves giving close attention to the issue. Despite this awareness and debate fake news does not filter into the day to day experiences of communications practitioners with just a quarter (24.4 per cent) citing its daily relevance. Perhaps more surprisingly given the context discussed above, only a small number of practitioners (12.3 per cent) rate dealing with fake news and false information as an important issue for communication management. As such there appears to be noticeable gap between the perceived intensity of debate about fake news and the perceived influence on the public sphere across Europe. The countries with the strongest impact of fake news are the Czech Republic, Romania, Serbia and Russia.

One quarter of organisations have already been affected by fake news (at least once and possibly more often) in some form or other. When broken down by sector it is evident that governmental, public and political organisations are more impacted by fake news than companies. The sources of fake news follow the origins of the debate with social media being the main source of misleading content (81.3 per cent), but mass media (59.6 per cent) can also originate this form of information. These insights from communication practitioners challenge recent industry reports based on population polls that believe in a reinforcement of trust in traditional media against social media and fake news (e.g. Edelman, 2018). The detail of topics and subjects for targeting false and misleading news for communicators tend to be the organisation itself or its related brands (55.1 per cent). However, products and services (43.8 per cent) and individuals like top managers (41.5 per cent) are also frequently targeted.

When it comes to identifying fake news, systems and processes are scarce in European organisations. In this regard, only 12.0 per cent of affected organisations can be classified as advanced, based on a cluster analysis of survey data. Advanced organisations rely on specific technologies, routines and competent communication staff. Overall, it is astonishing to see that every fifth organisation (19.6 per cent) believes that being prepared to identify potential fake news is not a necessity.

Fake news is strongly debated across Europe – many communication professionals focus on the issue and believe that trust building gains in importance

How communication professionals assess fake news



'Fake news' = news in mass or social media that is intentionally and verifiably false or with low facticity, intended to mislead recipients.

39.5% rate

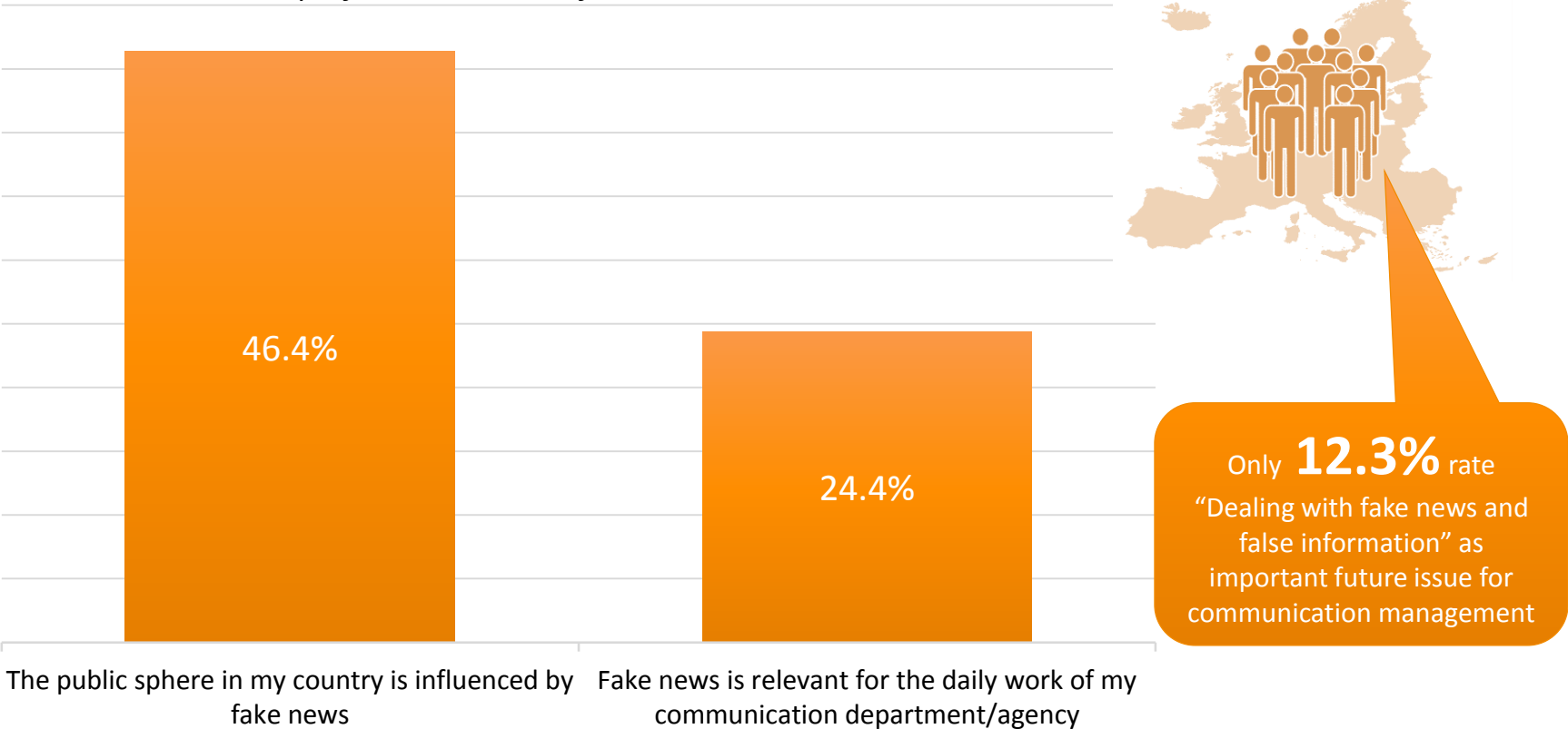
"Building and maintaining trust" as one of the most important issues for communication management in the near future



www.communicationmonitor.eu / Zerfass et al. 2018 / n = 3,096 communication professionals. Q 1: Fake news has become a buzzword, especially in the political field (US presidential elections, Brexit debate, etc.), but also related to reports about celebrities, brands and organisations. We define 'fake news' as news in mass or social media that is intentionally and verifiably false or with low facticity, intended to mislead recipients. Please rate these statements based on your experience. Scale 1 (Not at all) – 5 (To a great extent). Percentages: Frequency based on scale points 4-5. Q 6: 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.

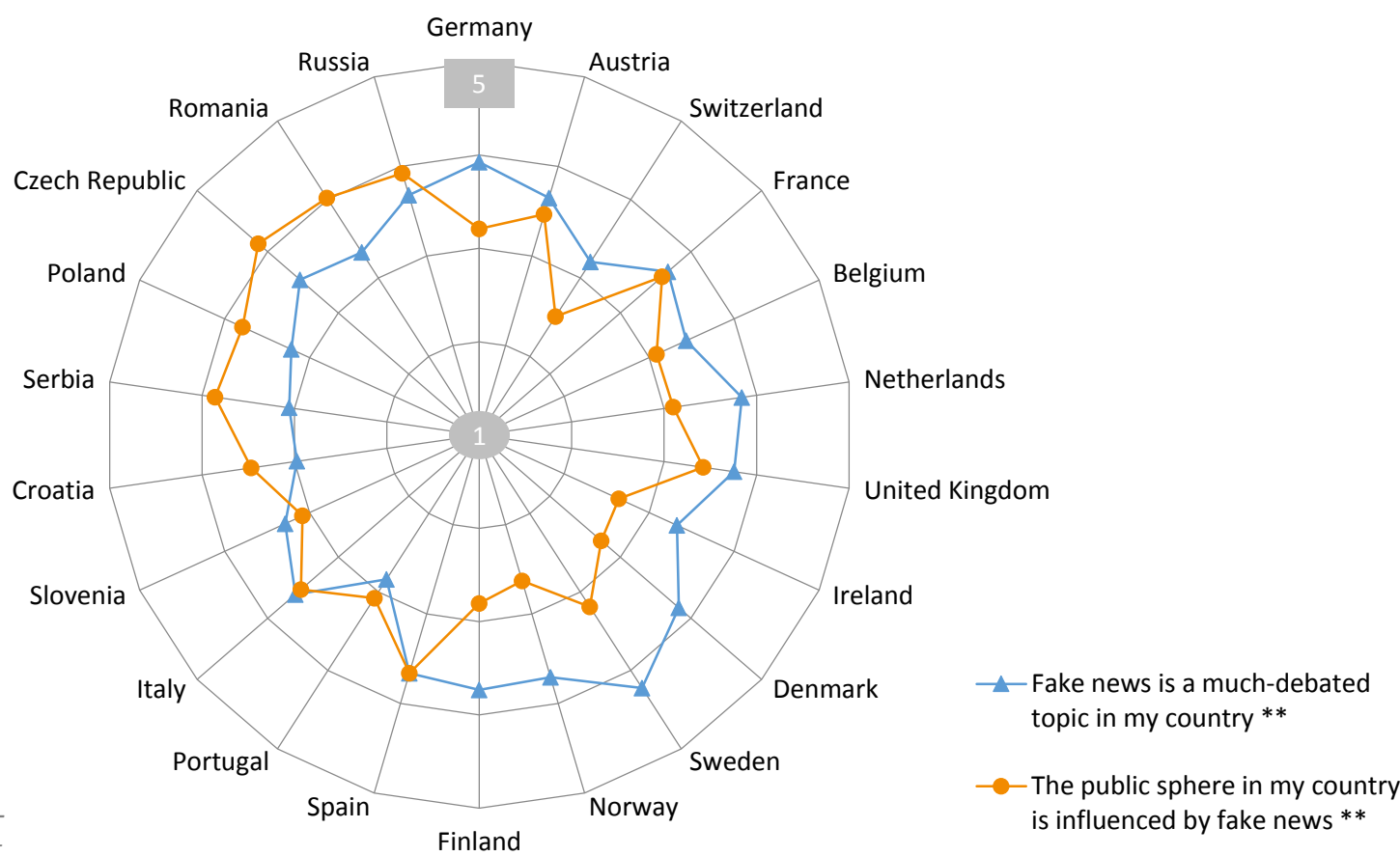
Even though the public sphere seems to be influenced by fake news, it seems to be less relevant in day to day work in communications

How communication professionals assess fake news



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Striking differences between the intensity of the debate about fake news and the perceived influence on the public sphere across European countries



Scale: (1) Not at all –
(5) To a great extent

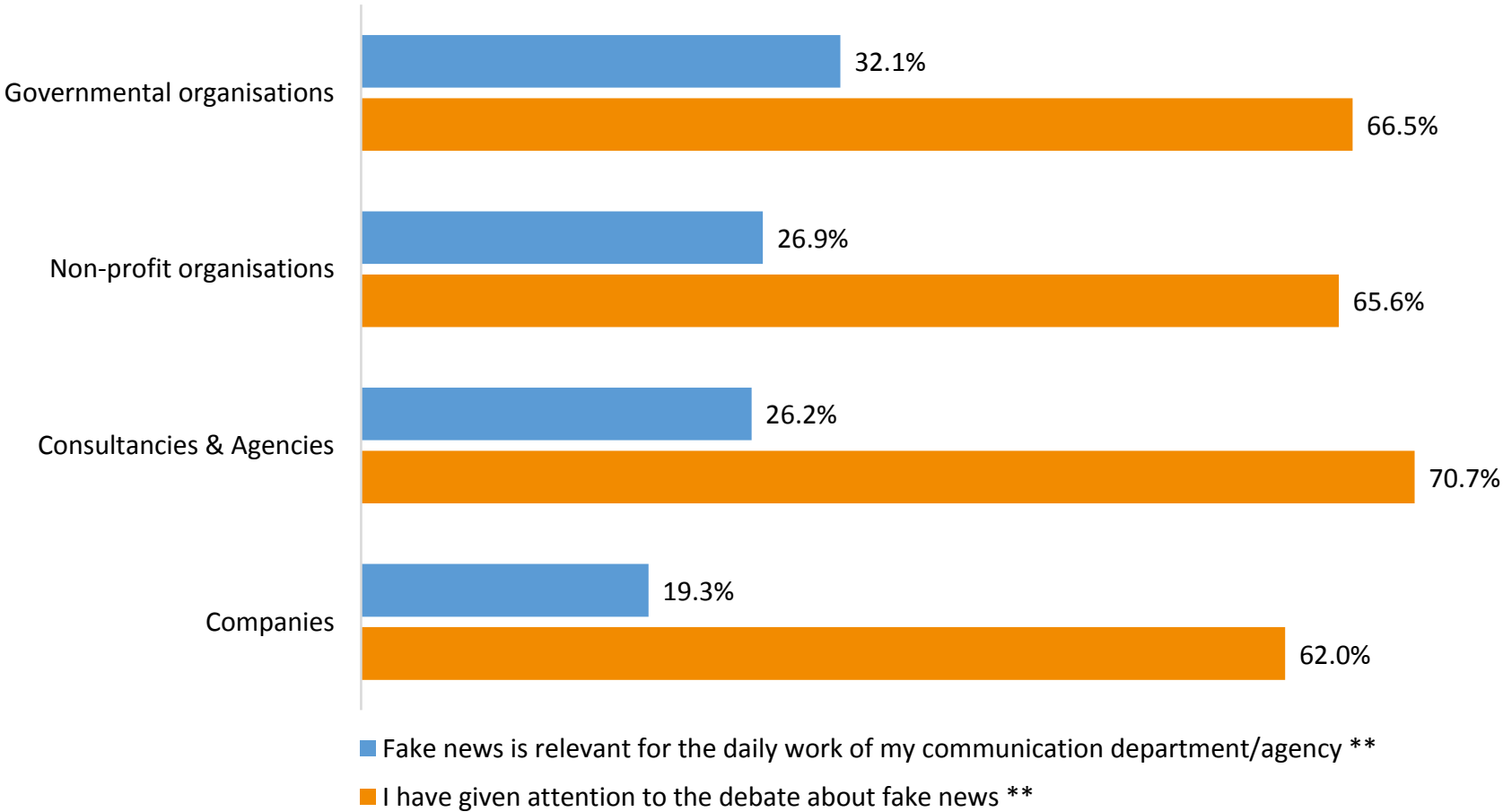
www.communicationmonitor.eu / Zerfass et al. 2018 / n = 2,753 communication professionals from 22 countries. Q 1: Fake news has become a buzzword, especially in the political field (US presidential elections, Brexit debate, etc.), but also related to reports about celebrities, brands and organisations. We define 'fake news' as news in mass or social media that is intentionally and verifiably false or with low facticity, intended to mislead recipients. Please rate these statements based on your experience. Scale 1 (Not at all) – 5 (To a great extent). Mean values. ** Highly significant differences (ANOVA/Scheffe post-hoc test, $p \leq 0.01$).

Assessment of fake news across Europe

	I have given attention to the debate about fake news	Fake news is a much-debated topic in my country	The public sphere in my country is influenced by fake news		I have given attention to the debate about fake news	Fake news is a much-debated topic in my country	The public sphere in my country is influenced by fake news
Germany	83.8%	73.1%	37.1%	Finland	86.1%	63.9%	20.4%
Austria	80.3%	60.6%	52.1%	Spain	61.0%	64.9%	61.0%
Switzerland	67.9%	38.0%	14.6%	Portugal	60.7%	28.2%	35.9%
France	63.2%	63.2%	54.7%	Italy	60.3%	60.8%	55.8%
Belgium	64.4%	52.3%	34.3%	Slovenia	55.9%	41.4%	30.6%
Netherlands	74.0%	69.1%	35.9%	Croatia	51.4%	28.4%	50.5%
United Kingdom	61.9%	64.0%	49.4%	Serbia	34.6%	38.3%	68.2%
Ireland	70.0%	48.6%	18.6%	Poland	68.9%	41.0%	63.9%
Denmark	74.6%	68.3%	17.5%	Czech Republic	68.9%	57.4%	80.3%
Sweden	87.2%	80.3%	34.2%	Romania	48.2%	46.7%	73.8%
Norway	75.0%	66.3%	15.2%	Russia	52.8%	58.5%	66.0%

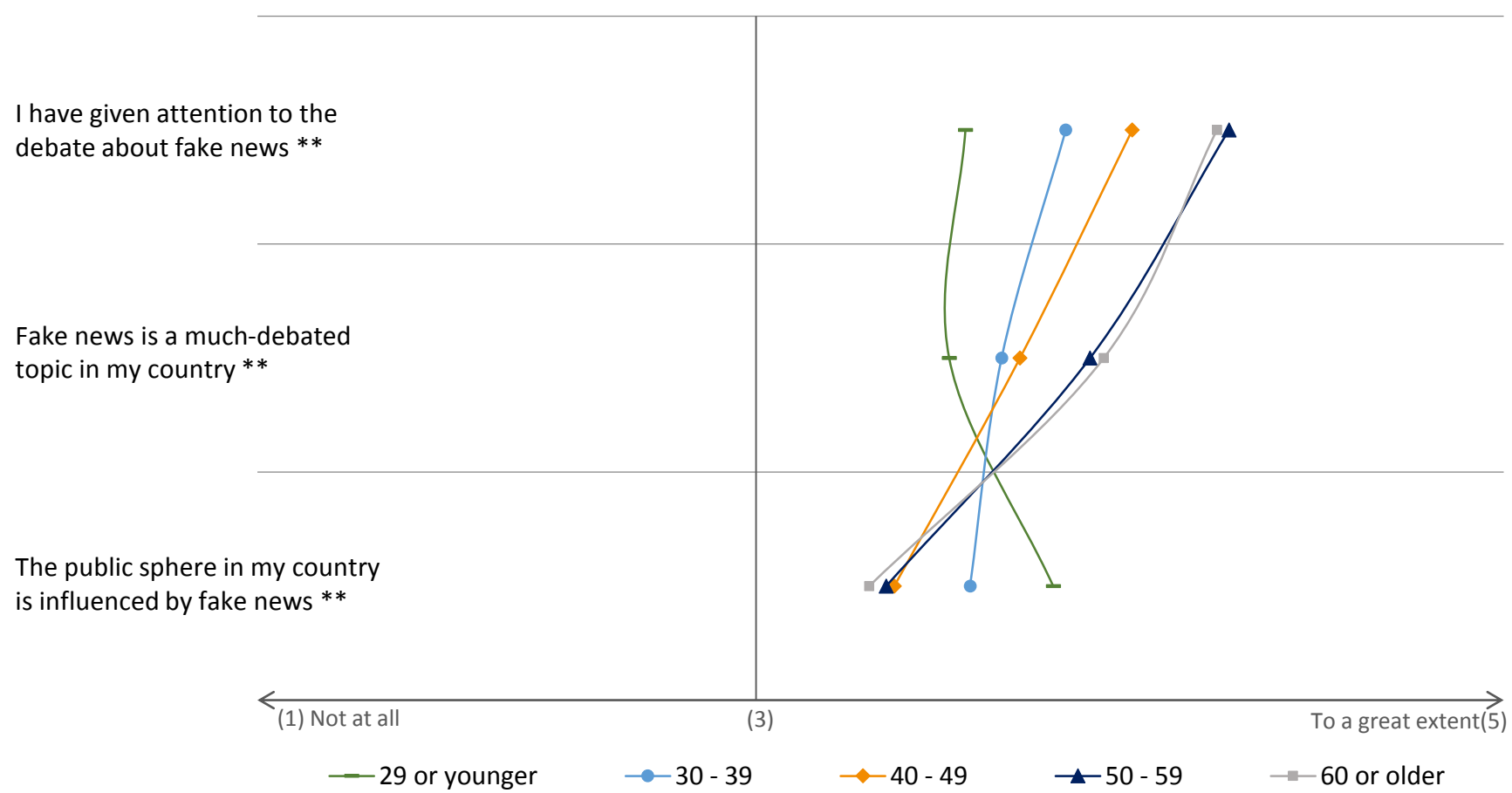
www.communicationmonitor.eu / Zeffass et al. 2018 / n = 2,753 communication professionals from 22 countries. Q 1: Fake news has become a buzzword, especially in the political field (US presidential elections, Brexit debate, etc.), but also related to reports about celebrities, brands and organisations. We define 'fake news' as news in mass or social media that is intentionally and verifiably false or with low facticity, intended to mislead recipients. Please rate these statements based on your experience. Scale 1 (Not at all) – 5 (To a great extent). Percentages: Frequency based on scale points 4-5.

One third of the communication departments in government-owned, public and political organisations have to handle fake news; companies are least concerned



www.communicationmonitor.eu / Zerfass et al. 2018 / n = 3,096 communication professionals. Q 1: Fake news has become a buzzword, especially in the political field (US presidential elections, Brexit debate, etc.), but also related to reports about celebrities, brands and organisations. We define ‘fake news’ as news in mass or social media that is intentionally and verifiably false or with low facticity, intended to mislead recipients. Please rate these statements based on your experience. Scale 1 (Not at all) – 5 (To a great extent). Percentages: Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, $p \leq 0.01$).

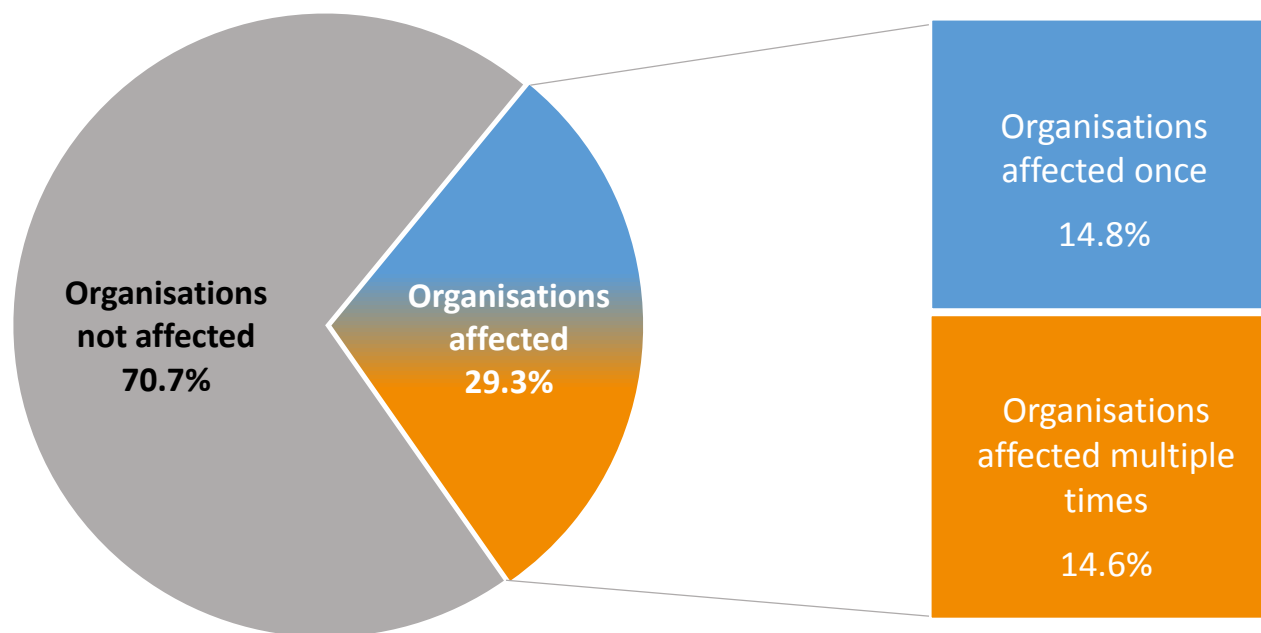
Older practitioners follow the fake news debate more intensively, but younger communicators report its social influence as being much stronger



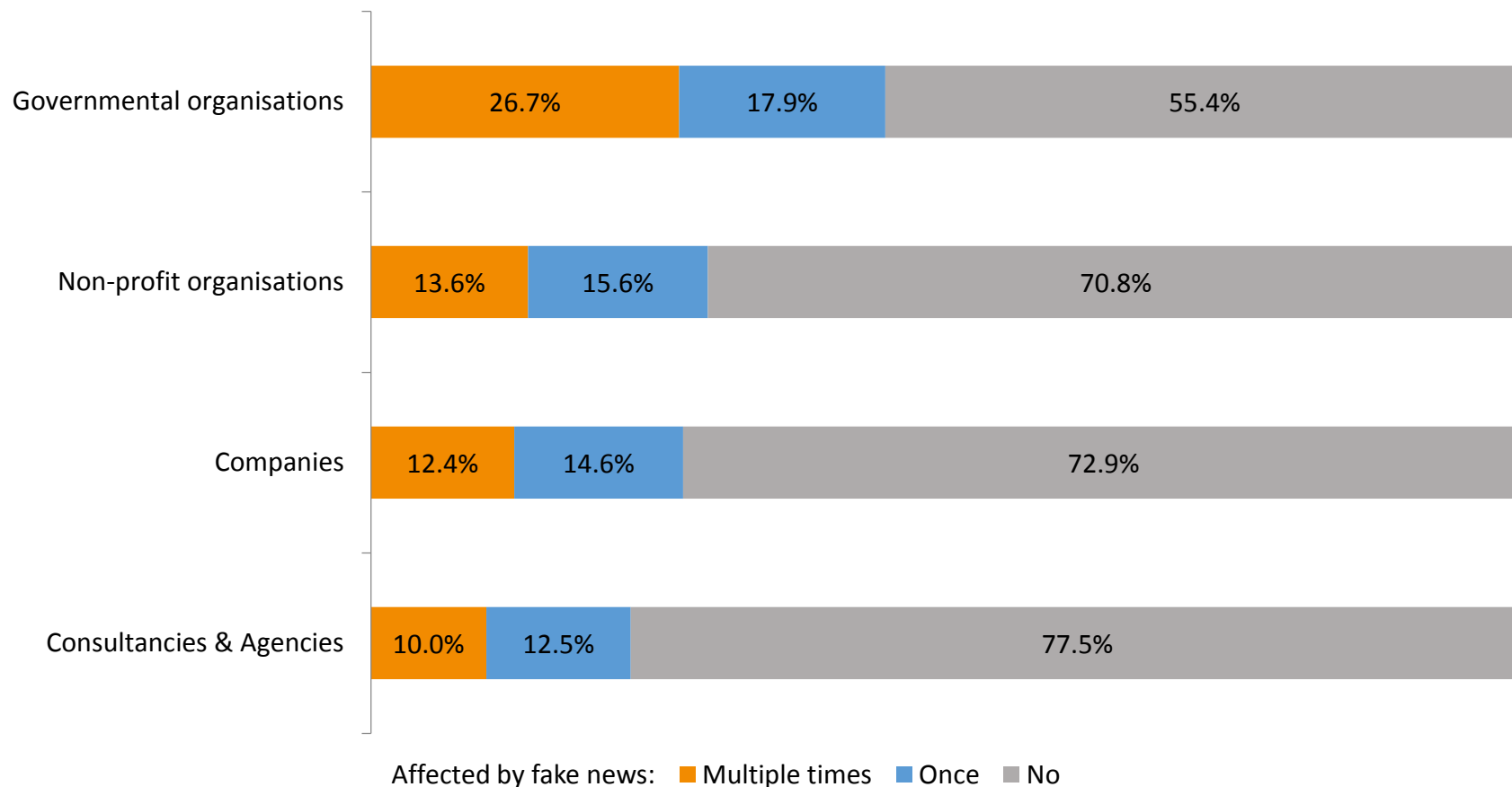
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Impact of fake news on organisations: one quarter has already been affected

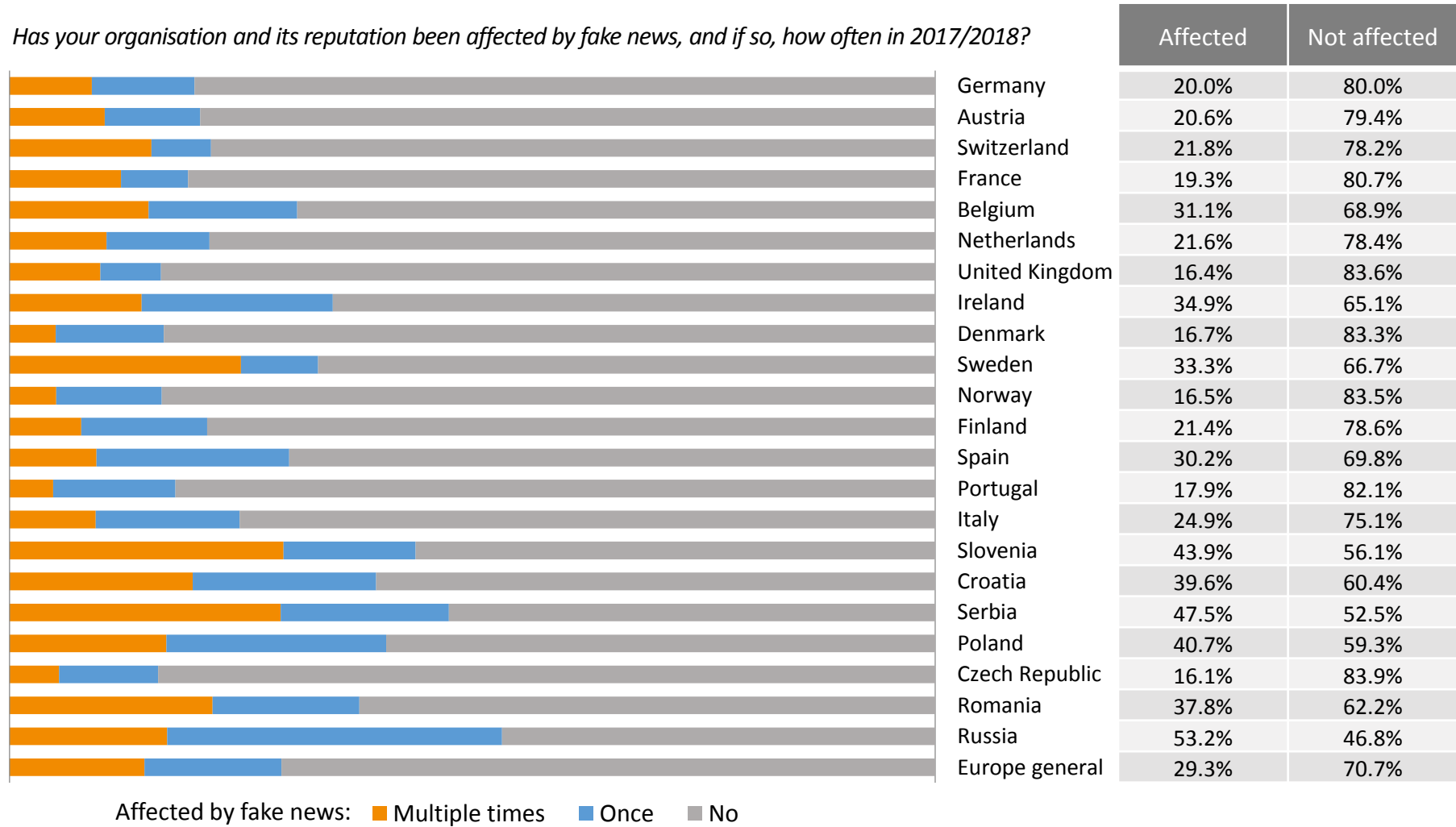
Has your organisation and its reputation been affected by fake news, and if so, how often in 2017/2018?



Government-owned, public sector and political organisations across Europe are particularly affected by fake news

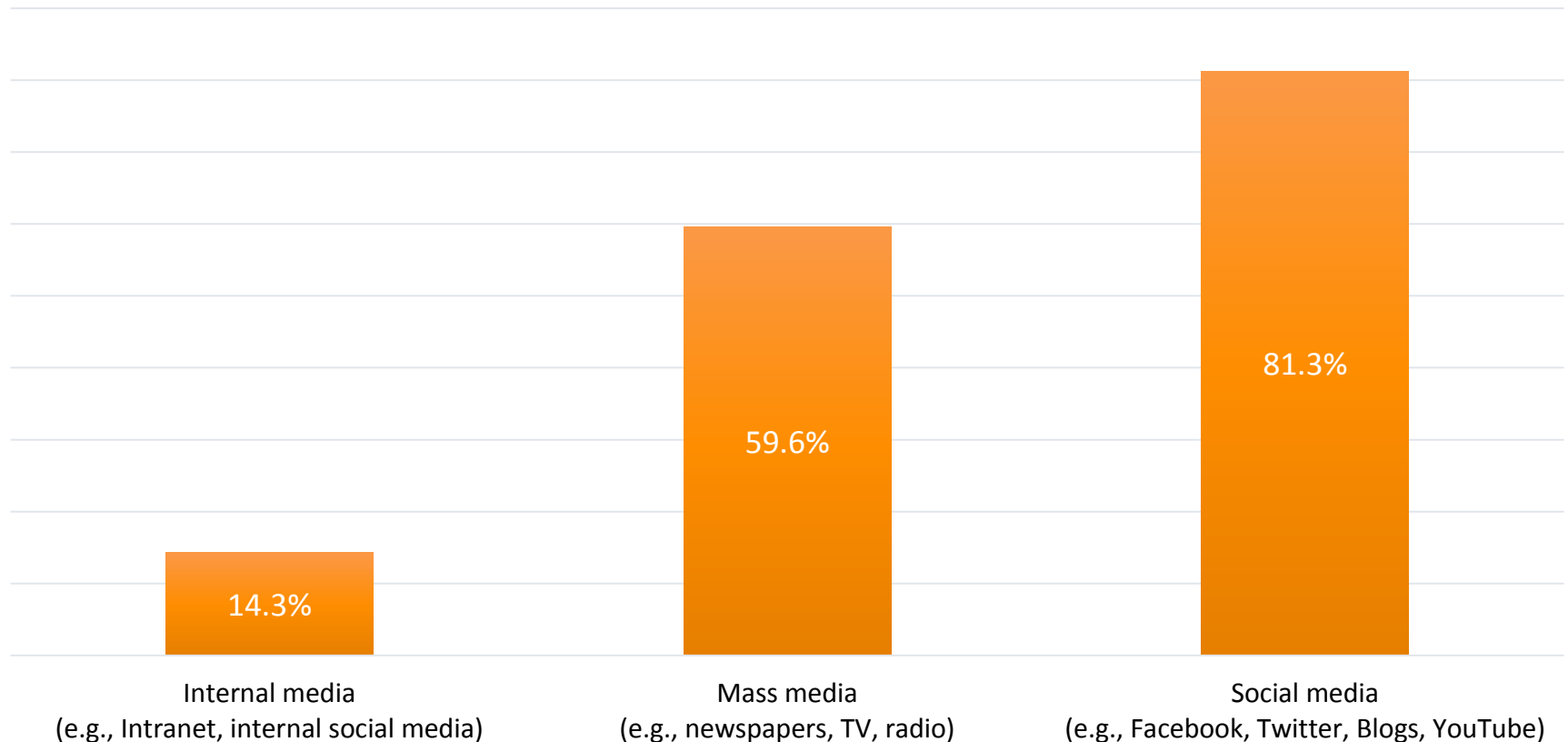


Russia, Serbia, Slovenia and Poland report the strongest impact of fake news on their organisations – the problem seems to be less relevant in other countries



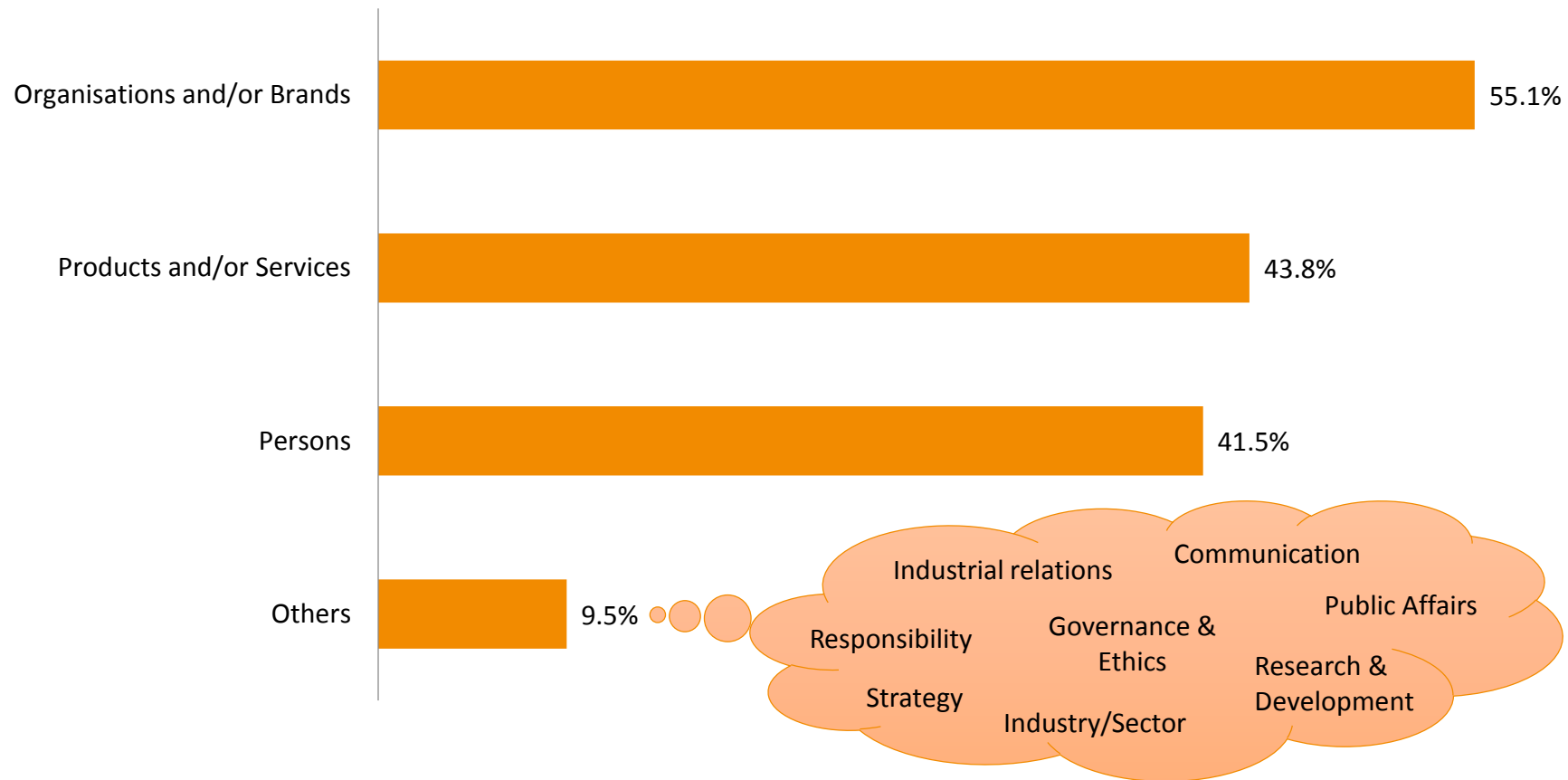
Social media are the main source for fake news – although misleading content is also distributed through mass media and internal communication channels

Source of fake news that has affected organisations



False and misleading news mostly impacts organisations and brands at large – but products, services and people are frequently targeted as well

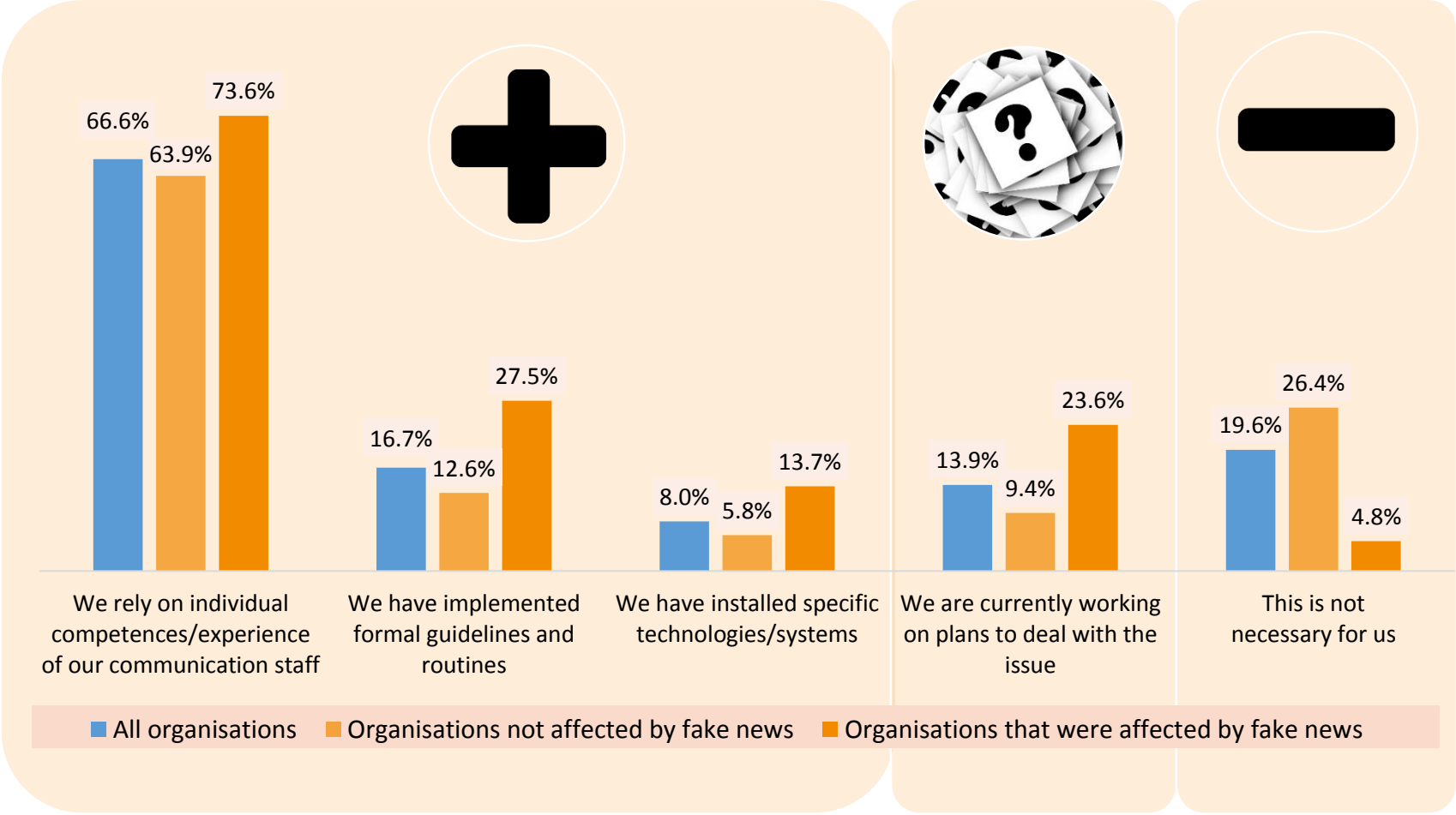
Content and focus of fake news that has affected organisations



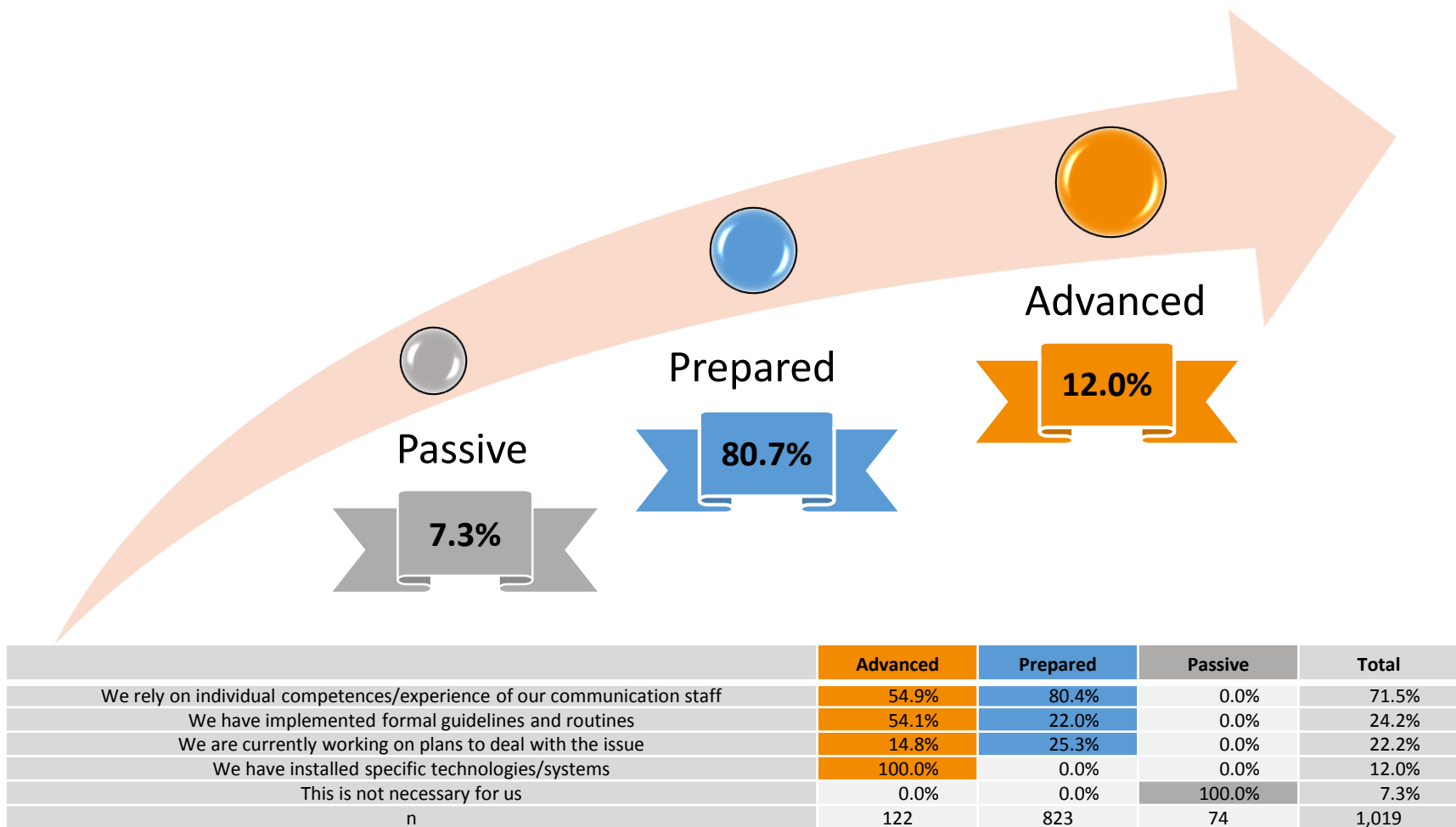
www.communicationmonitor.eu / Zeffass et al. 2018 / n = 813 communication professionals in organisations that were affected by fake news. Q 4: How has your organisation been affected by fake news? Please keep in mind that fake news is commonly understood as 'news in mass or social media that is intentionally and verifiably false or with low facticity, intended to mislead recipients'. What was the fake news about? Multiple answers possible. Qualitative content analysis by two human coders has been applied to analyse open answers in the category "Others".

Identifying fake news: Most organisations rely on individual competences of communication staff; those who have been affected are better prepared

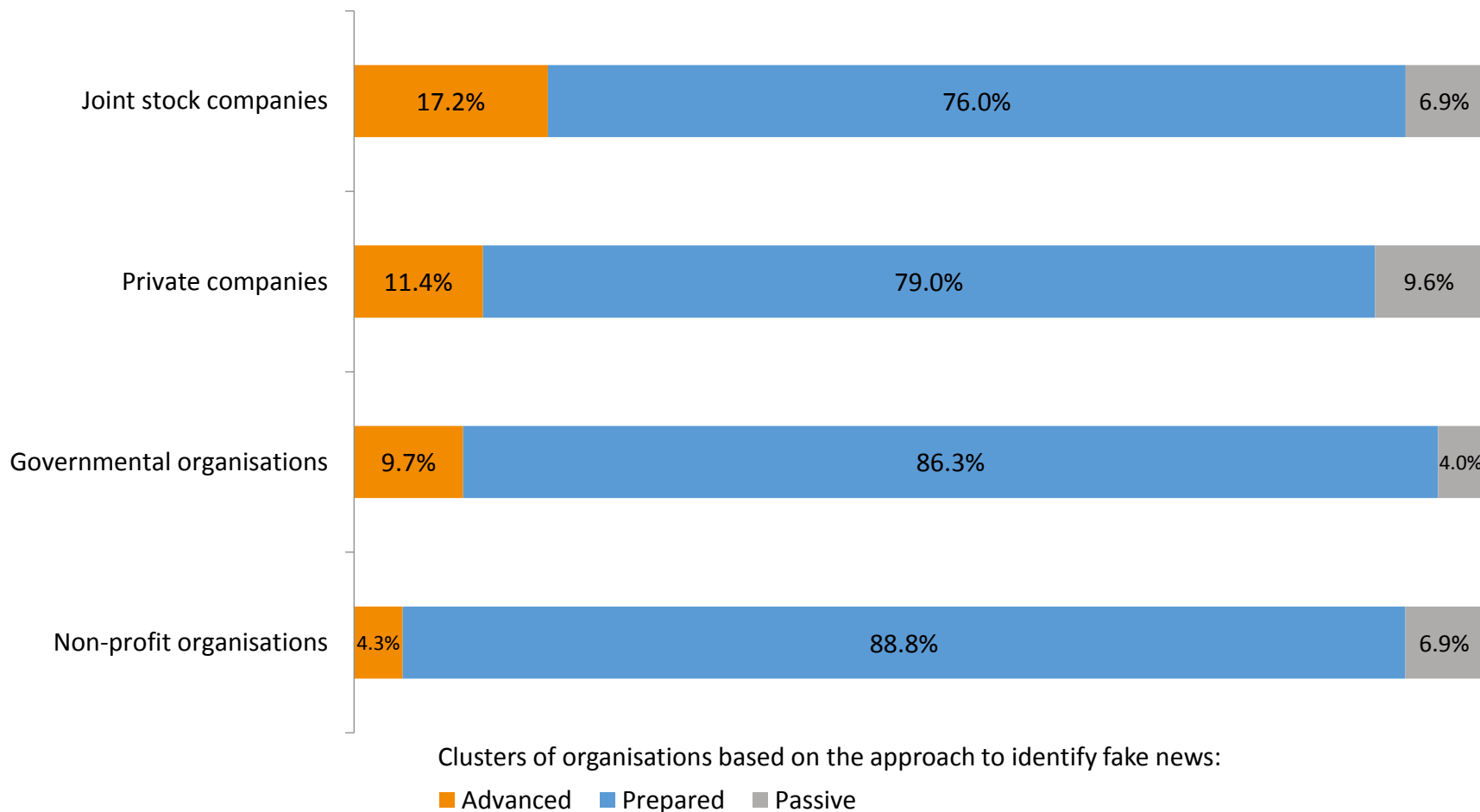
How is your communication department/agency prepared to identify (potential) fake news?



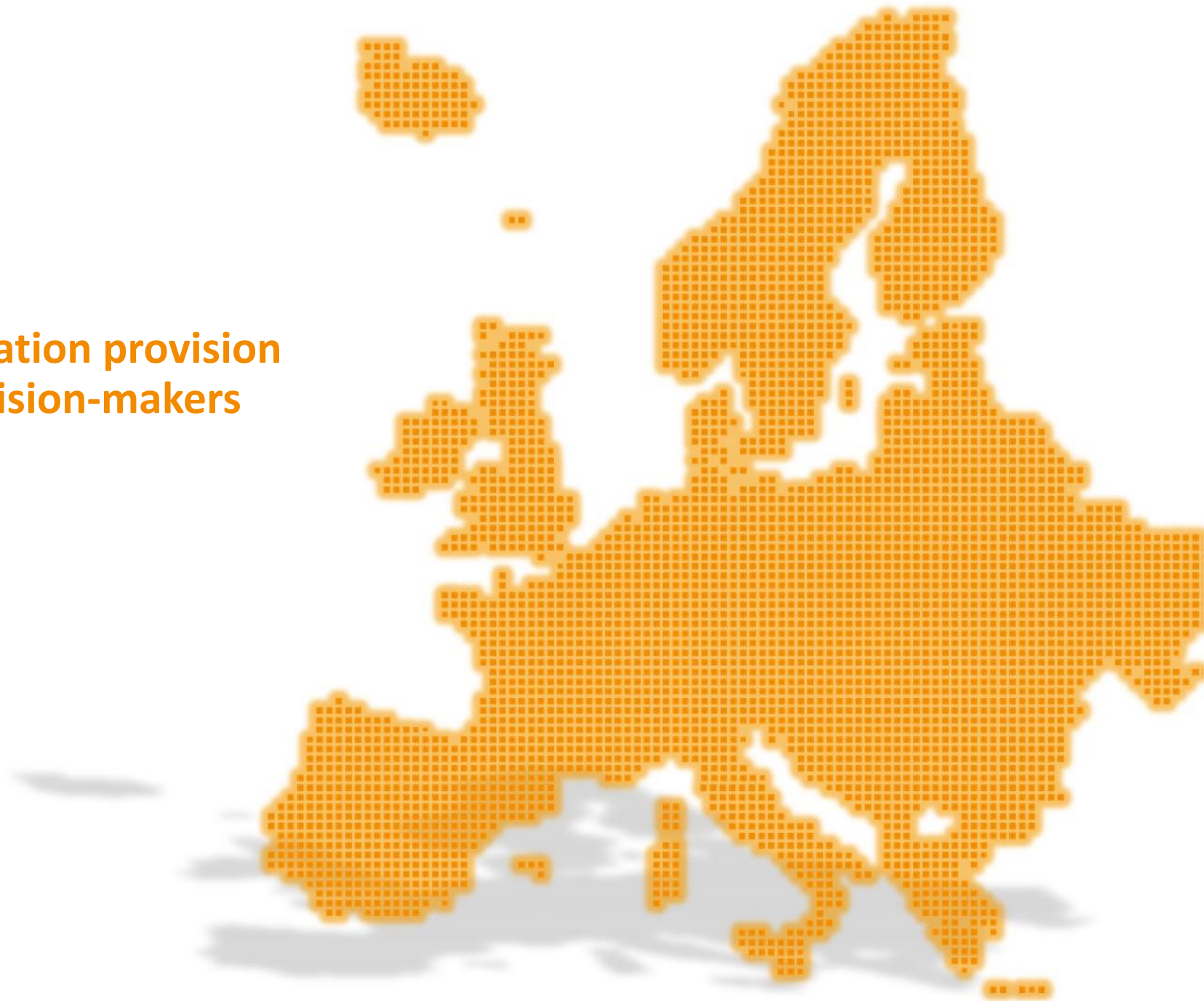
Cluster analysis reveals three different approaches to identify fake news:
Only 12 per cent of affected organisations have established advanced routines



Different approaches to identify fake news: Joint stock companies are more advanced and non-profits are lagging behind



**Information provision
for decision-makers**



Chapter overview

In today's digital and mediatised world we face a plethora of rapid-fire information that is ubiquitous in both our personal and professional lives. Consequently, selecting and delivering relevant information becomes more and more relevant. Top managers consider it an important contribution to organisational success (The Economist Group & Hill+Knowlton Strategies, 2016). Keeping decision-makers and (internal) clients up to date with useful information is a core task for communicators and helps them to fulfil their role (Mykkänen, 2017; Mykkänen & Vos, 2015). A daily executive news briefing is an example of an upcoming structural way of informing managers about what is happening outside the organisation and especially in the media (Serjeantson, 2015).

The results of this year's monitor show that providing information to decision-makers is indeed a common practice across Europe. Almost 90.0 per cent of the communication departments and agencies deliver information to top management and/or (internal) clients. However, not everybody agrees that this is a core task for communications. 64.7 per cent of the respondents agree, but also 17.9 per cent disagree. A majority of the practitioners agree that information providing helps to gain recognition for communications (68.0 per cent agree) in the organisation and a slightly smaller group thinks that it offers great opportunities for positioning their unit (56.8 per cent). Not surprisingly a similar portion of professionals – six out of ten – believe that information provision is gaining in importance for their department or agency.

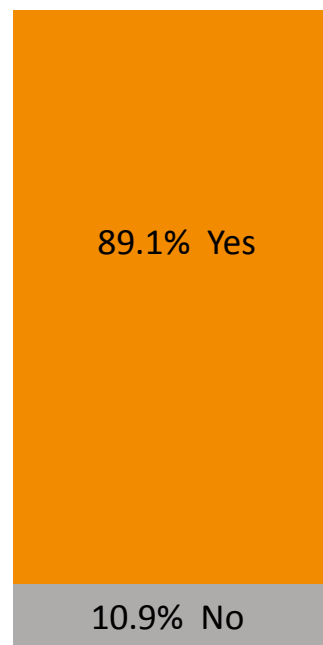
By far the most important and most frequently provided information by communication specialists is about news in 'gate kept' media (mass media with professional journalists) and social media. Media monitoring reports and curated news briefings are provided regularly by respectively 74.6 and 59.6 per cent of the communication departments and agencies. Other information for example from surveys, background research about issues, stakeholders, reputation development or benchmarks are much less frequent than information about published content of interest. Media monitoring insights, news briefings and survey data are significantly more used in joint stock companies and governmental organisations compared to private companies and non-profit organisations.

A problematic picture emerges when we take a look at the timeliness and frequency of the information offered by communication units. Only monitoring reports about the published discourse in print outlets (newspapers, magazines) are provided on a daily basis in the majority of organisations (54.8 per cent). Daily insights on what is going on in social networks or on television are delivered less often (by just over 36 per cent). In almost 40 per cent of the organisations such reports are provided less often than weekly or never. Print media monitoring and TV monitoring is most frequently used in governmental organisations, whereas non-profits are lagging behind in terms of social media reports. Across Europe only the frequency pattern of providing TV monitoring varies significantly among countries. Executive news briefings, which include media content that is edited and interpreted by communication professionals before it is provided to management, are much less frequently made. Only 28.4 per cent of the communication departments and agencies in Europe use this advanced type of reporting.

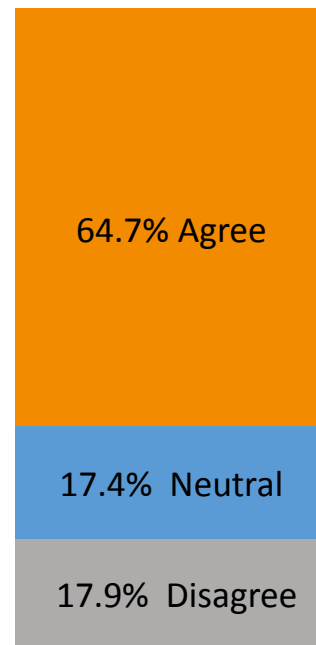
The results of this year's monitor show that communication departments still have a narrow definition of providing information to decision makers, a definition that leads to an emphasis on mass and social media monitoring and less on assessing issues, stakeholders, reputations, brands and performance benchmarks of the organisation.

Providing information to decision-makers is a common practice in communication departments/agencies, but only two thirds consider it a core task

Information is delivered to top management and/or (internal) clients



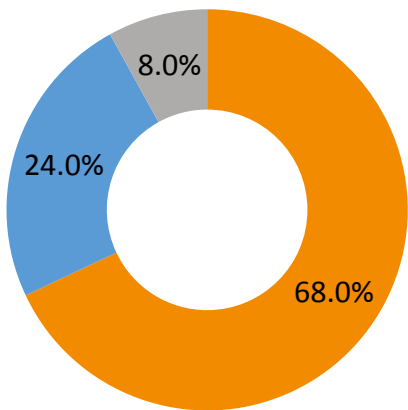
Information providing is a core task for the department/agency



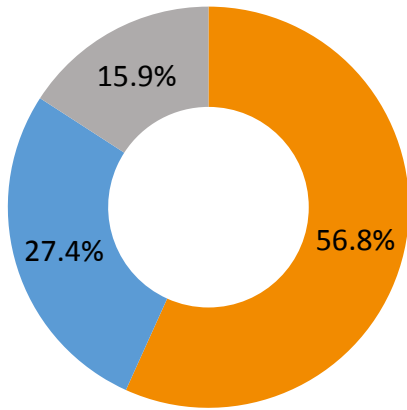
The majority of professionals agree that information providing helps to gain recognition and position communications – it will thus become more important

Providing information for decision-makers ...

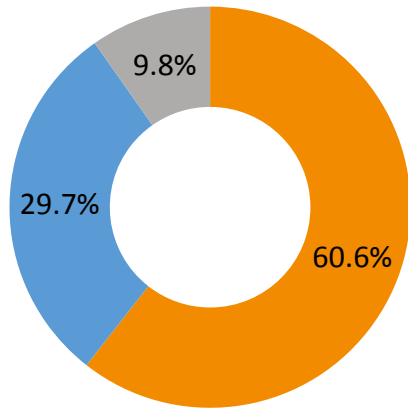
offers great opportunities to gain recognition from top management and (internal) clients



offers great opportunities to position ourselves against other departments/agencies



is gaining in relevance for our department/agency



Agree Neutral Disagree

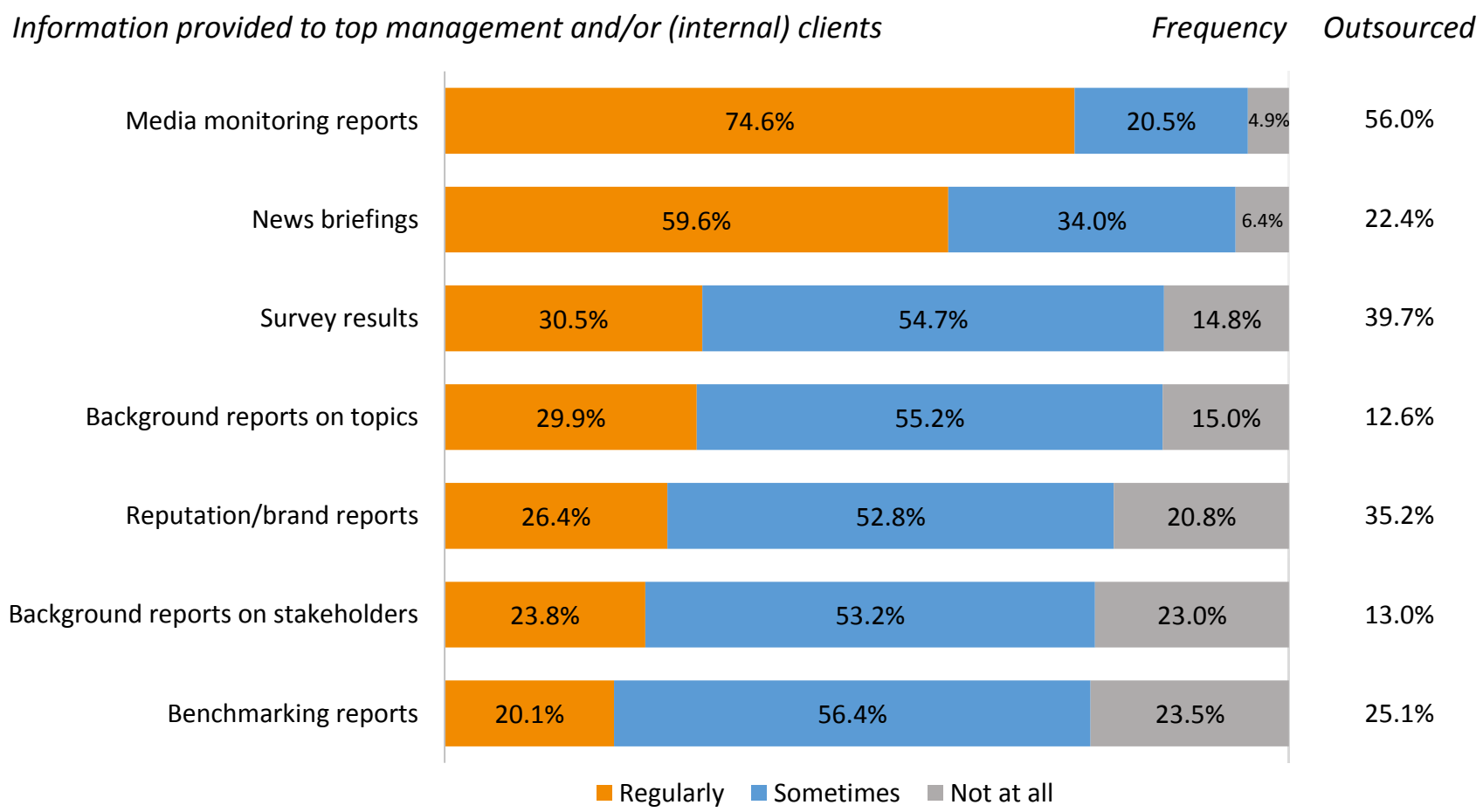
www.communicationmonitor.eu / Zerfass et al. 2018 / n ≥ 3,048 communication professionals. Q 7: Many communication departments/agencies provide insights to top management and (internal) clients by delivering information through daily news briefings, media monitoring, survey results, and other reports like scenarios or benchmarks. Please rate the following statements based on your experience. Scale 1 (Strongly disagree) – 5 (Strongly agree). Disagreement: scale points 1-2; Neutral: scale point 3; Agreement: scale points 4-5.

Communication professionals working in consultancies and non-profits value the opportunities of information providing higher than peers in other organisations

Providing information for decision-makers ...	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations	Consultancies and Agencies	Overall
is a core task for our department/agency	65.5%	62.7%	64.6%	66.2%	65.2%	64.7%
offers great opportunities to gain recognition from top management and (internal) clients	67.6%	64.4%	67.9%	68.3%	71.3%	68.0%
offers great opportunities to position ourselves against other departments/agencies **	54.8%	54.5%	51.5%	57.8%	63.5%	56.8%
is gaining in relevance for our department/agency	59.4%	58.9%	61.1%	66.2%	60.2%	60.6%

www.communicationmonitor.eu / Zerfass et al. 2018 / n = 3,096 communication professionals. Q 7: Many communication departments/agencies provide insights to top management and (internal) clients by delivering information through daily news briefings, media monitoring, survey results, and other reports like scenarios or benchmarks. 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 (chi-square test, $p \leq 0.01$, Cramér's $V = 0.052$).

Various reports provided to decision-makers:
Key ones are for monitoring social and mass media (and these are outsourced)



www.communicationmonitor.eu / Zerfass et al. 2018 / n = 2,740 communication professionals. Q 9a: How frequently does your department or agency provide the following information to top management and/or (internal) clients? Media monitoring reports (e.g., clippings and evaluation of mass media or social media news); News briefings (e.g., edited or curated overviews of news and discussions in mass media, social media, etc.); Survey results (e.g., employee or customer surveys); Background reports on topics (e.g., strategic issues, scenarios); Reputation/brand reports (e.g., based on image or brand evaluation); Background reports on stakeholders (e.g., potential opponents, influencers, collaborators); Benchmarking reports (e.g., internal/external comparisons). Q 9b: And which reports are mainly prepared by external service providers?

Information and reports provided by communications: Significant differences between various types of organisations

	Joint stock companies		Private companies		Governmental organisations		Non-profit organisations		Consultancies and Agencies		<i>Overall</i>	
	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced
Media monitoring reports	79.2%	70.1%	67.3%	53.4%	78.5%	55.8%	65.5%	43.4%	77.7%	52.0%	74.6%	56.0%
News briefings	58.9%	32.9%	52.3%	25.2%	65.5%	21.3%	56.9%	13.8%	63.0%	16.0%	59.6%	22.4%
Survey results	43.9%	43.2%	29.7%	38.4%	30.3%	35.8%	27.9%	28.6%	21.8%	45.2%	30.5%	39.7%
Background reports on topics	26.8%	17.6%	27.9%	13.1%	23.4%	9.1%	26.9%	10.7%	39.6%	11.4%	29.9%	12.6%
Reputation/ brand reports	32.8%	52.6%	27.3%	33.1%	21.7%	35.4%	19.3%	24.5%	26.6%	27.3%	26.4%	35.2%
Background reports on stakeholders	19.3%	16.4%	21.3%	14.9%	17.5%	10.1%	16.2%	9.3%	36.6%	12.1%	23.8%	13.0%
Benchmarking reports	24.2%	37.2%	20.6%	25.5%	14.3%	20.8%	14.5%	17.9%	22.6%	21.3%	20.1%	25.1%

Types of reports provided to top management in Western and Northern Europe

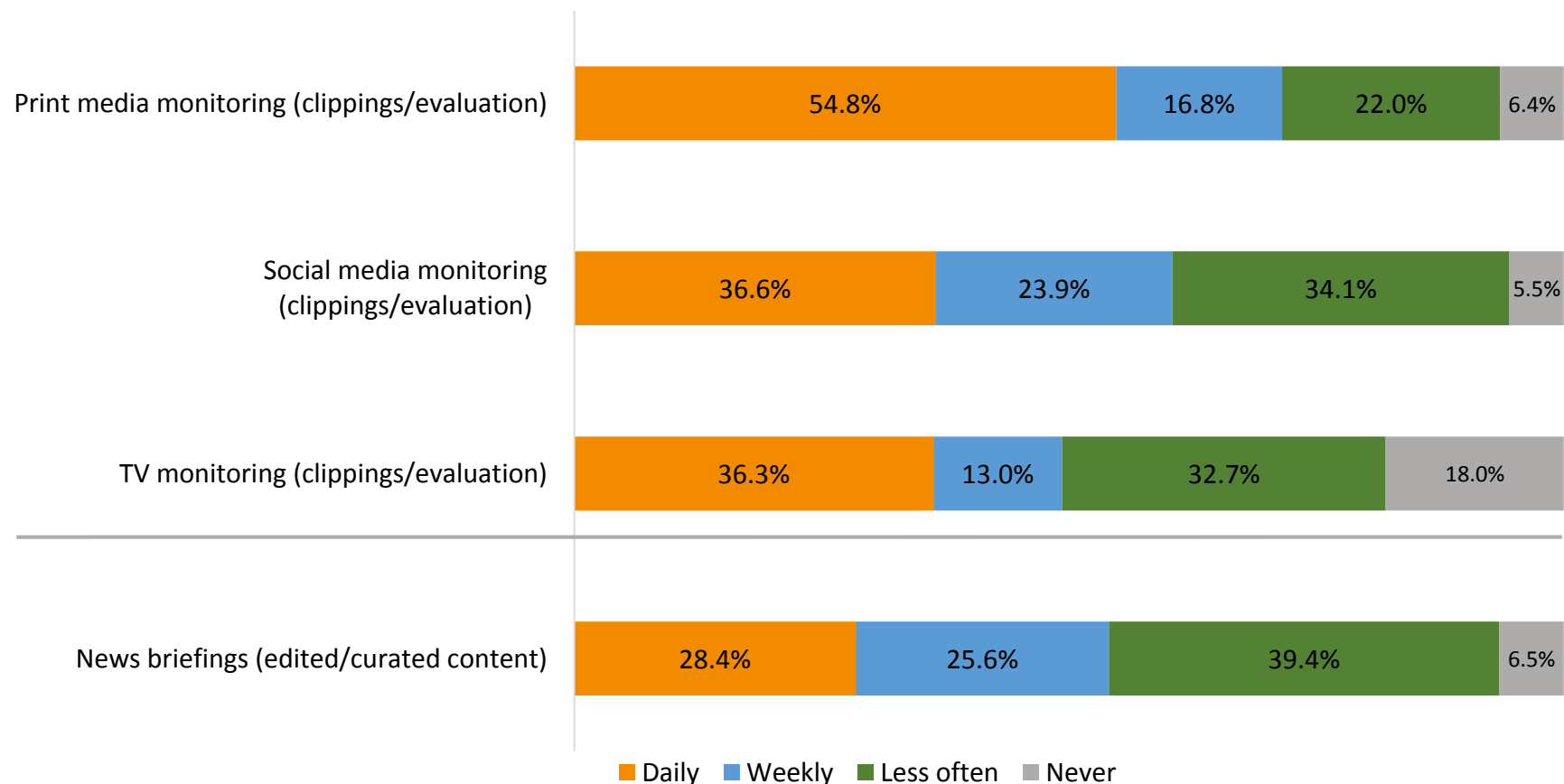
	Media monitoring reports		News briefings		Survey results		Background reports on topics		Reputation/ brand reports		Background reports on stakeholders		Benchmarking reports	
	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced
Germany	79.1%	65.0%	59.9%	27.7%	27.1%	40.1%	26.0%	13.6%	23.7%	41.2%	24.3%	11.3%	21.5%	20.9%
Austria	76.3%	61.0%	45.8%	11.9%	20.3%	33.9%	28.8%	5.1%	20.3%	32.2%	20.3%	8.5%	15.3%	23.7%
Switzerland	81.8%	62.8%	59.5%	16.5%	34.7%	33.9%	27.3%	15.7%	29.8%	43.8%	19.8%	14.0%	14.0%	33.9%
France	75.9%	49.4%	62.1%	21.8%	33.3%	35.6%	36.8%	9.2%	24.1%	31.0%	24.1%	12.6%	29.9%	28.7%
Belgium	65.1%	27.4%	62.9%	10.8%	29.0%	32.3%	47.3%	9.7%	21.0%	26.3%	28.5%	10.2%	17.2%	18.8%
Netherlands	73.5%	54.3%	71.0%	21.0%	36.4%	36.4%	30.9%	13.6%	30.2%	40.7%	27.2%	16.0%	18.5%	38.3%
United Kingdom	68.5%	47.7%	62.0%	20.8%	34.3%	31.9%	29.6%	13.0%	23.1%	25.0%	18.1%	11.1%	19.0%	25.0%
Ireland	88.9%	61.9%	73.0%	11.1%	33.3%	47.6%	39.7%	6.3%	25.4%	41.3%	25.4%	9.5%	22.2%	19.0%
Denmark	72.9%	61.0%	61.0%	15.3%	30.5%	37.3%	20.3%	10.2%	18.6%	49.2%	15.3%	13.6%	22.0%	37.3%
Sweden	75.7%	57.3%	64.1%	28.2%	34.0%	33.0%	14.6%	7.8%	26.2%	34.0%	13.6%	7.8%	17.5%	17.5%
Norway	69.0%	51.7%	59.8%	27.6%	23.0%	37.9%	28.7%	8.0%	16.1%	42.5%	19.5%	9.2%	11.5%	21.8%
Finland	73.8%	72.8%	53.4%	21.4%	46.6%	46.6%	17.5%	18.4%	32.0%	62.1%	14.6%	15.5%	16.5%	21.4%

Types of reports provided to top management in Southern and Eastern Europe

	Media monitoring reports		News briefings		Survey results		Background reports on topics		Reputation/ brand reports		Background reports on stakeholders		Benchmarking reports	
	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced	Regu- larly	Out- sourced
Spain	78.2%	61.3%	66.9%	39.4%	29.6%	42.3%	29.6%	15.5%	28.9%	42.3%	20.4%	19.7%	26.1%	25.4%
Portugal	80.6%	53.4%	60.2%	25.2%	22.3%	34.0%	37.9%	9.7%	28.2%	41.7%	36.9%	8.7%	26.2%	30.1%
Italy	71.3%	54.0%	49.4%	21.8%	28.2%	35.6%	29.9%	13.8%	28.2%	37.9%	20.1%	14.9%	16.7%	27.6%
Slovenia	84.0%	70.2%	68.1%	21.3%	24.5%	53.2%	33.0%	11.7%	19.1%	34.0%	34.0%	11.7%	17.0%	19.1%
Croatia	76.8%	64.6%	63.6%	28.3%	25.3%	42.4%	30.3%	13.1%	18.2%	25.3%	31.3%	13.1%	21.2%	24.2%
Serbia	64.1%	55.4%	47.8%	27.2%	34.8%	31.5%	39.1%	16.3%	34.8%	19.6%	33.7%	16.3%	25.0%	19.6%
Poland	86.0%	68.4%	63.2%	14.0%	26.3%	36.8%	22.8%	22.8%	24.6%	24.6%	19.3%	19.3%	19.3%	21.1%
Czech Republic	83.6%	61.8%	63.6%	20.0%	29.1%	45.5%	14.5%	12.7%	27.3%	16.4%	14.5%	9.1%	21.8%	23.6%
Romania	58.9%	44.5%	42.5%	30.1%	20.5%	44.5%	25.3%	15.1%	32.2%	24.7%	26.7%	12.3%	19.9%	24.0%
Russia	82.9%	51.2%	46.3%	14.6%	31.7%	43.9%	39.0%	7.3%	24.4%	39.0%	22.0%	9.8%	14.6%	26.8%

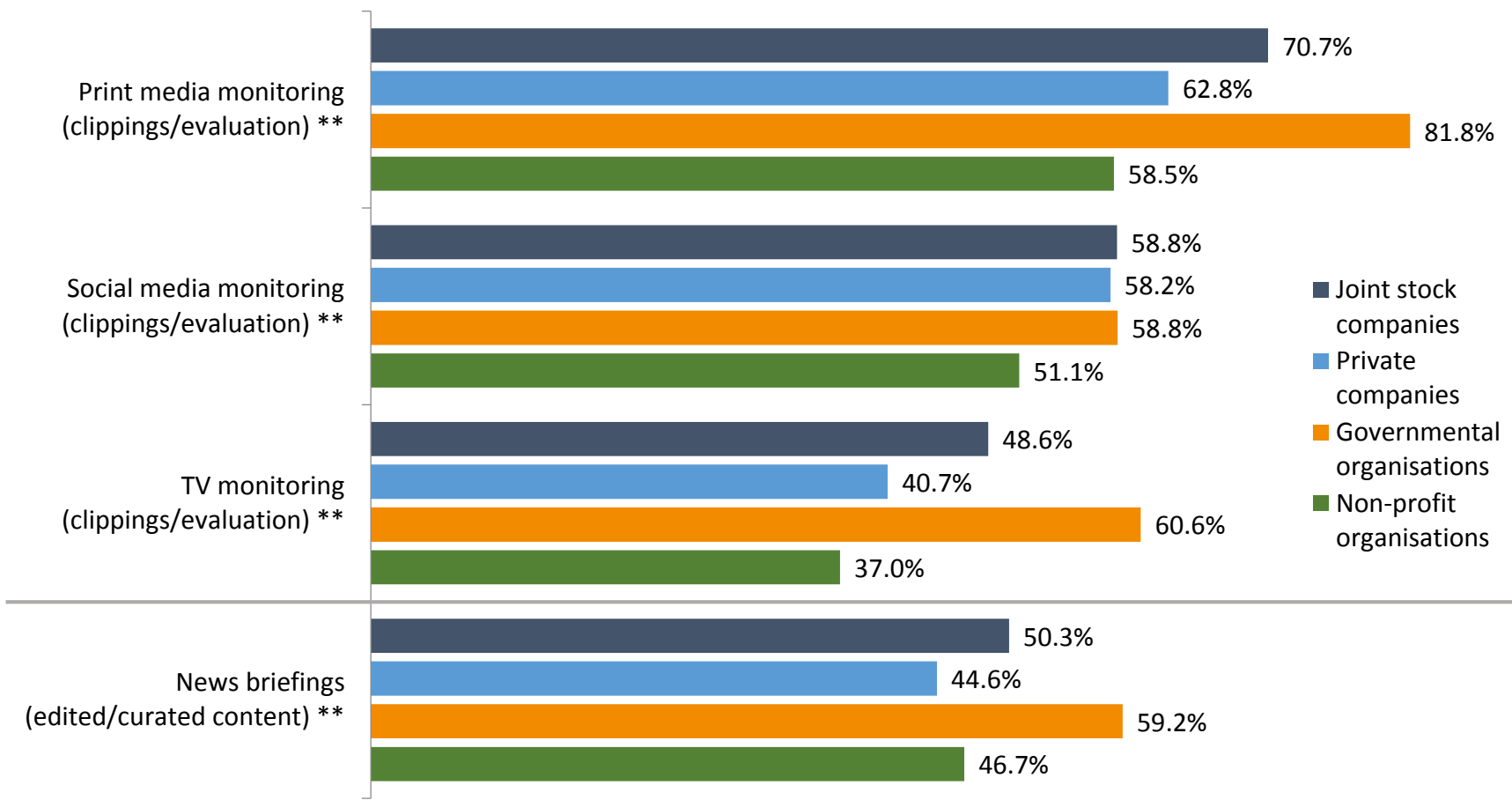
Up-to-date information is mostly restricted to the discourse in print media; social media monitoring and curated news briefings are less common

Frequency of monitoring reports and news briefings



Communication departments in governmental organisations are ahead in terms of media monitoring and news briefings

Weekly or daily provision of ...



Weekly or daily provision of media monitoring and news briefings across Europe

	Print media monitoring	Social media monitoring	TV monitoring **	News briefings		Print media monitoring	Social media monitoring	TV monitoring **	News briefings
Germany	74.7%	57.3%	40.8%	47.3%	Finland	68.4%	75.8%	40.6%	42.7%
Austria	74.1%	49.1%	42.6%	42.6%	Spain	77.7%	65.5%	44.2%	51.1%
Switzerland	76.9%	61.0%	51.7%	40.7%	Portugal	81.2%	72.0%	64.0%	54.5%
France	70.7%	56.8%	38.0%	55.6%	Italy	67.6%	54.5%	45.8%	52.4%
Belgium	52.5%	46.4%	27.8%	45.0%	Slovenia	88.2%	58.7%	76.9%	61.5%
Netherlands	69.4%	68.6%	42.3%	54.7%	Croatia	78.6%	59.6%	64.6%	63.2%
United Kingdom	68.1%	59.6%	43.1%	58.1%	Serbia	58.4%	57.3%	53.9%	63.2%
Ireland	87.3%	61.9%	69.8%	69.8%	Poland	76.8%	71.9%	62.5%	57.4%
Denmark	65.5%	60.0%	53.7%	50.0%	Czech Republic	81.1%	51.9%	67.9%	56.6%
Sweden	68.0%	58.5%	48.9%	54.8%	Romania	53.7%	63.5%	46.4%	48.0%
Norway	84.1%	54.9%	48.1%	55.6%	Russia	82.9%	63.4%	39.0%	61.0%

www.communicationmonitor.eu / Zeffass et al. 2018 / n ≥ 2,279 communication professionals from 22 countries. Q 10: How frequently does your department provide the following information to internal or external clients? Percentages show combined agreement for “daily” and “weekly”. ** Highly significant differences (chi-square test, p ≤ 0.01).

Strategic issues for communication management



Chapter overview

Over the last years linking business strategy and communication, building and maintaining trust, and coping with the digital evolution and the social web have consistently been the three most important issues for communication management (Tench et al., 2017, pp. 120-123). The current survey shows that practitioners in Europe think these issues continue to be the top challenges in the next three years as well. This year building and maintaining trust is rated as the top issue, mentioned by 39.5 per cent of the respondents in 2018. Digitalisation and the social web, ranked number one in 2017, loses slightly in importance, and slips down to third place, with 36.8 per cent of the respondents naming it as a key issue. Linking business strategy and communication continues to be an unsolved challenge in the profession. It is number two again, mentioned by 37.7 per cent.

Trust, including building and maintaining it, is considered the number one issue for the field for the first time since the monitor started in 2007. Even in the years of the economic crisis, when trust in businesses and organisations was low, this was not considered the most important issue for communications. Apparently trust is now considered more problematic than before, which might be related to the impact of fake news on public opinion building discussed in a previous chapter.

The growing influence of national cultures on the assessment of issues was shown in a previous analysis of the strategic issues among countries in 2007 and 2016 (Verhoeven et al., 2017). We were able to identify a robust statistical effect for the influence of national culture on strategic issues for that period. This effect can also explain the differences found in this year's monitor. National professional cultures evolve differently, although around some of the same issues they have a differentiated focus and weightings. In some countries digitalisation is considered the most important issue (e.g. in Germany, Switzerland, Ireland, Portugal, Croatia), in others it is linking business and communication (e.g. in France, the United Kingdom, Denmark, Norway, Finland, Spain, Poland, Czech Republic). The overall key topic of trust building is leading the list in Austria, Belgium, Netherlands, Sweden, Italy, Slovenia, Serbia, and Romania. The country effect that was established for 2016 seems to continue today.

Besides the three main issues, a second group of issues can be identified. Those topics are mentioned by a range of between 20 and 32 per cent of the respondents. They include issues like matching the need to address more audiences and channels with limited resources, dealing with the rising flow of information, more transparency and active audiences, using big data, and strengthening the role of communications in supporting top-management decision-making. Both the top group and the second group of issues are assessed differently in various types of organisations and by professionals in a leading role and others. Practitioners working in corporate communications focus more on goal alignment in the first group, while their peers in non-profits have to deal more with limited resources in the second group. Limited resources and strategy alignment are also more of an issue for heads of communications, while digitalisation and trust worries other professionals more.

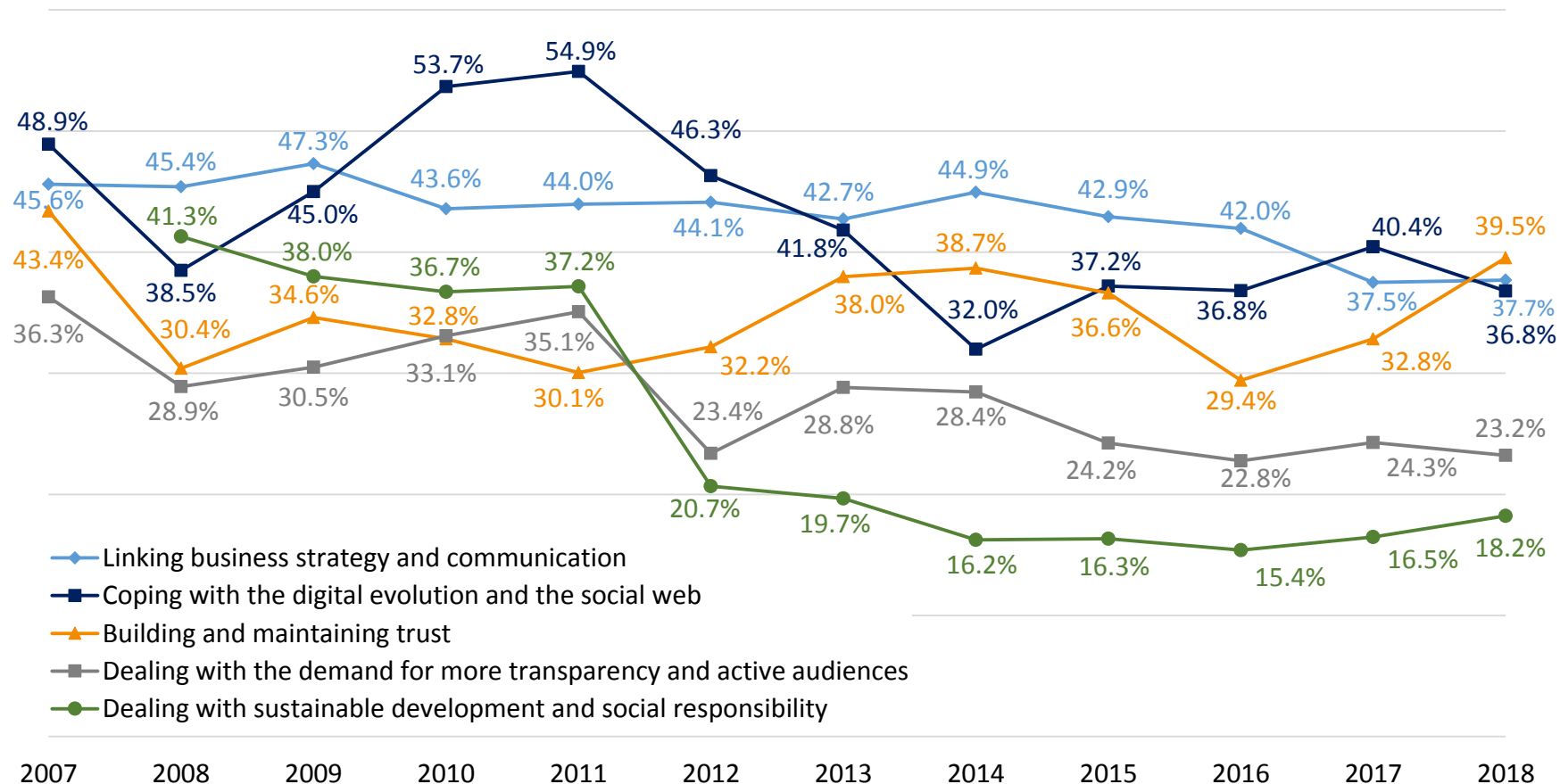
Overall the study shows that the practice of strategic communication still struggles with basic challenges like linking communication goals and activities to overarching strategies. Recent developments in research like a clarification of alignment and its dimensions (Volk & Zerfass, 2018) and the development of enhanced evaluation frameworks depicting such links (Macnamara, 2018) might help to address these questions.

Most important strategic issues for communication management until 2021



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

Strategic issues perceived as most important



www.communicationmonitor.eu / Zeffass et al. 2018 / n = 3,096 communication professionals (Q 6); Zeffass et al. 2017 / n = 3,387 (Q 5); Zeffass et al. 2016 / n = 2,710 (Q 9); Zeffass et al. 2015 / n = 2,253 (Q 5); Zeffass et al. 2014 / n = 2,777 (Q 16); Zeffass et al. 2013 / n = 2,710 (Q 6); Zeffass et al. 2012 / n = 2,185 (Q 9); Zeffass et al. 2011 / n = 2,209 (Q 6); Zeffass et al. 2010 / n = 1,955 (Q 7); Zeffass et al. 2009 / n = 1,863 (Q 12); Zeffass et al. 2008 / n = 1,524 (Q 6); Zeffass 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.

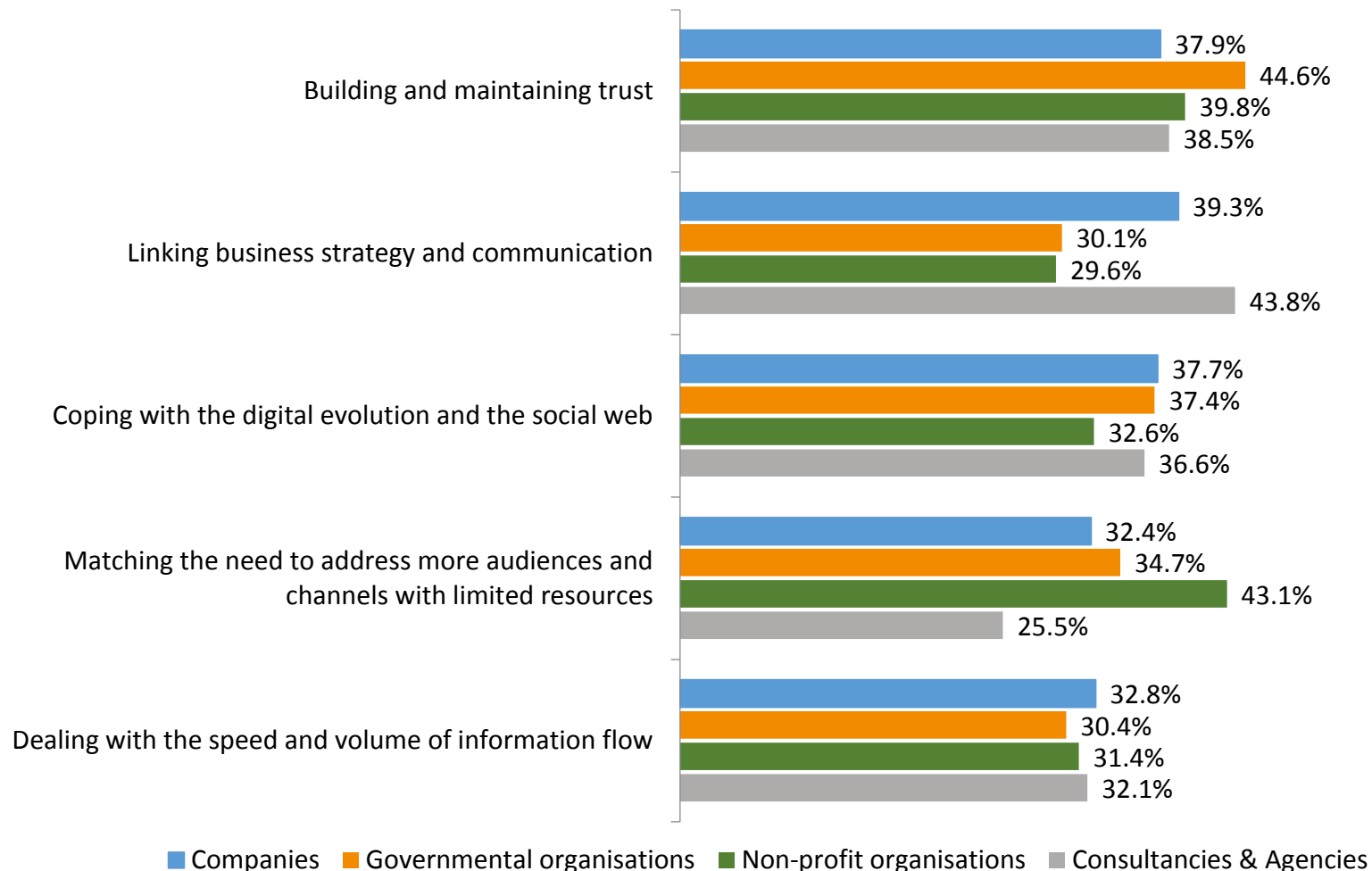
Perceived relevance of strategic issues until 2021 in Western and Northern Europe

	Building and maintaining trust	Linking business strategy and communication	Coping with the digital evolution and the social web	Matching the need to address more audiences and channels with limited resources	Dealing with the speed and volume of information flow	Strengthening the role of the communication function in supporting top-management decision making	Dealing with the demand for more transparency and active audiences
Germany	36.5%	39.1%	46.2%	41.1%	35.0%	27.4%	20.3%
Austria	42.3%	21.1%	33.8%	33.8%	42.3%	26.8%	23.9%
Switzerland	38.7%	32.1%	44.5%	44.5%	34.3%	34.3%	13.9%
France	37.9%	41.1%	34.7%	40.0%	33.7%	22.1%	23.2%
Belgium	43.5%	30.1%	29.6%	38.9%	33.3%	33.8%	32.4%
Netherlands	42.5%	42.0%	29.8%	29.8%	22.1%	33.1%	29.3%
United Kingdom	33.5%	43.9%	41.8%	39.3%	33.9%	31.8%	20.5%
Ireland	40.0%	40.0%	48.6%	22.9%	38.6%	40.0%	11.4%
Denmark	47.6%	57.1%	33.3%	36.5%	23.8%	19.0%	28.6%
Sweden	50.4%	30.8%	42.7%	32.5%	24.8%	30.8%	32.5%
Norway	43.5%	45.7%	35.9%	39.1%	25.0%	25.0%	22.8%
Finland	29.6%	44.4%	30.6%	33.3%	24.1%	27.8%	34.3%

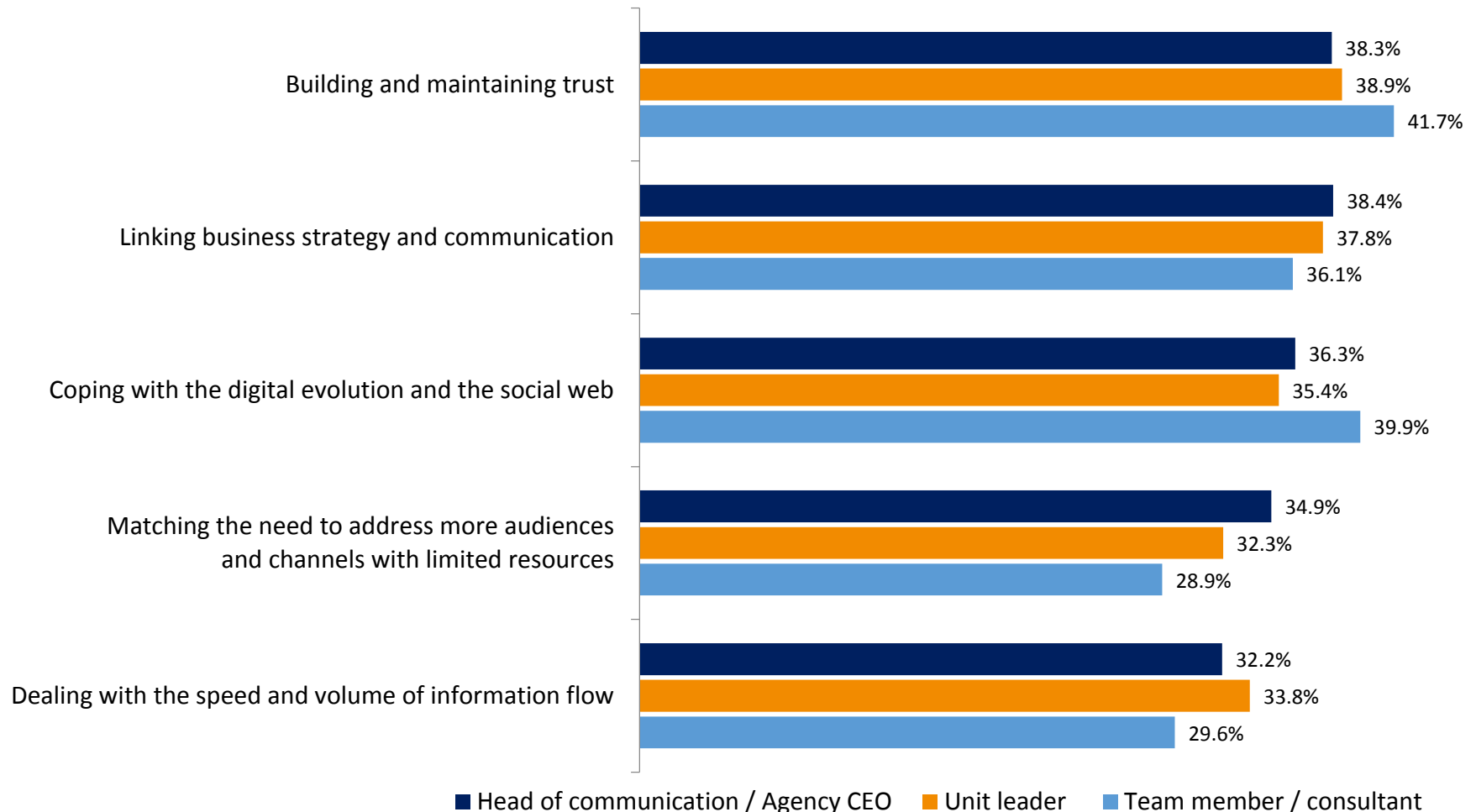
Perceived relevance of strategic issues until 2021 in Southern and Eastern Europe

	Building and maintaining trust	Linking business strategy and communication	Coping with the digital evolution and the social web	Matching the need to address more audiences and channels with limited resources	Dealing with the speed and volume of information flow	Strengthening the role of the communication function in supporting top-management decision making	Dealing with the demand for more transparency and active audiences
Spain	39.0%	49.4%	26.0%	27.9%	26.6%	32.5%	26.0%
Portugal	28.2%	37.6%	42.7%	20.5%	36.8%	32.5%	23.9%
Italy	43.2%	37.7%	35.2%	27.1%	24.1%	30.7%	18.6%
Slovenia	45.0%	28.8%	34.2%	26.1%	36.0%	32.4%	22.5%
Croatia	33.0%	33.9%	36.7%	31.2%	36.7%	35.8%	18.3%
Serbia	47.7%	37.4%	40.2%	30.8%	29.9%	25.2%	19.6%
Poland	36.1%	44.3%	32.8%	16.4%	31.1%	21.3%	19.7%
Czech Republic	39.3%	42.6%	32.8%	36.1%	45.9%	14.8%	9.8%
Romania	43.6%	36.9%	31.8%	20.5%	30.8%	23.1%	29.2%
Russia	39.6%	39.6%	39.6%	17.0%	41.5%	26.4%	20.8%

Strategic issues: Companies and agencies focus on goal alignment; non-profits on getting along with limited resources; agencies lead on strategy and communication link



The hierarchical level of communication professionals influences their perceptions about the most important issues in the field



**Leadership and
organisational culture**



Chapter overview

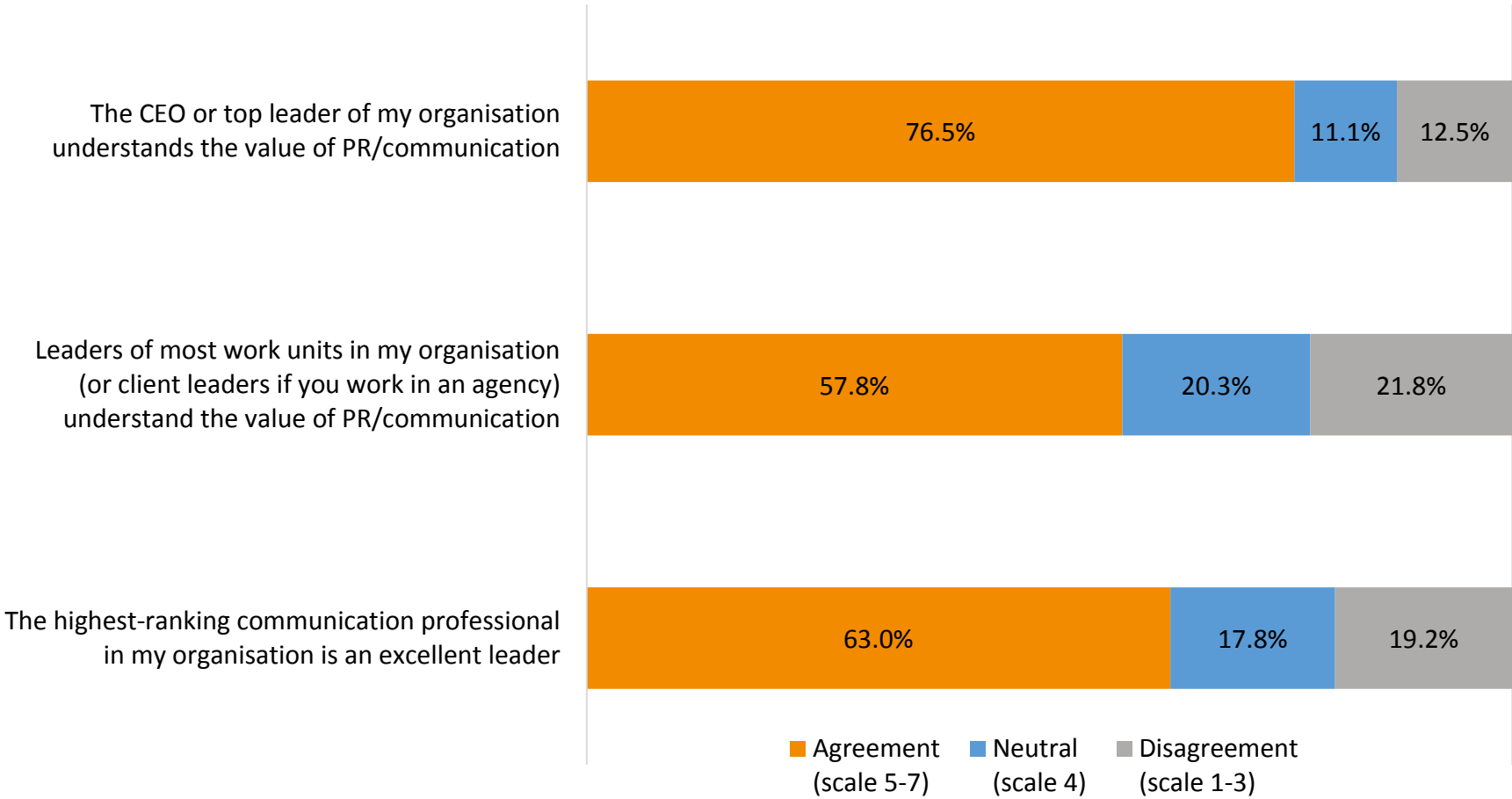
Communication helps organisations to be related to the dynamic of the world. To make this happen, communication departments need also to be completely integrated into the organisation they work for (Tench et al., 2017). Along this line, the fourth commandment in our book about communication excellence based on the first decade of monitor data states: Excellent communication departments are embedded in the organisation they work for and these organisations are effectively embedded in the societal, cultural and social spaces they are part of (Tench et al., 2017, pp. 61-85). A prerequisite for being embedded is effective leadership. Communication professionals have to show leadership (Berger & Meng, 2015) to be able to become embedded in the organisation and the organisation has to show leadership to become embedded in its surroundings.

In 2015 the Plank Center for Leadership in Public Relations and Heyman Associates in the United States produced its first 'Report card on PR leaders' (Berger et al., 2015). Communication leaders and their units were evaluated and achieved what the authors termed 'passing grades' for the five key areas examined – leadership performance, job engagement, trust in the organisation, work culture and job satisfaction. Crucial gaps were also highlighted to outline areas for improvement. This work which also produced an overall leadership index was repeated later (Berger et al., 2017) with grades for leadership performance and trust returning unchanged from the earlier responses, but noticeably responses for work culture, job engagement and job satisfaction had slipped. The overall grade for public relations leaders fell from B- to C+. And there were large reported differences between leaders' and employees' perceptions of the five areas. The 2018 monitor studies in Europe, Latin America and North America build on this research and explore those issues across different continents (see pages 100-105 in this report for a more detailed debate).

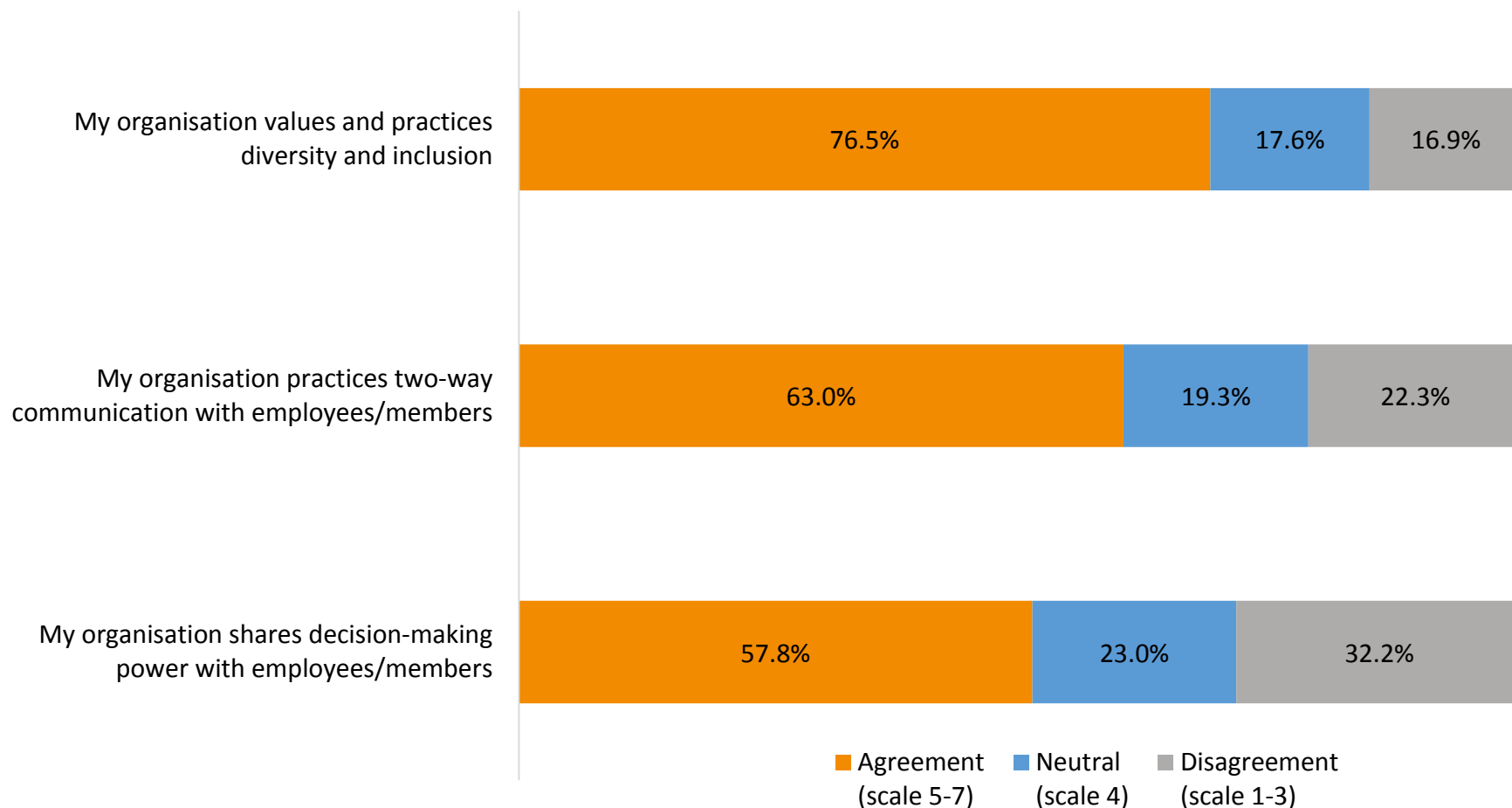
The questions on leadership and organisational culture in the ECM 2018 draw out some interesting findings. For example, although 76.5 per cent of the respondents state that the top leader in their organisation understands the value of communication, only 57.8 per cent confirm the same for other leaders like those of most work units. At the same time, about 20 per cent of the communication leaders in the organisations surveyed are said to lack leadership excellence. A lack of performance among higher ranks is clearly visible. What is interesting and chimes with the studies cited earlier is that like in the United States (Berger et al., 2017), across Europe there is an experience gap between communication leaders and other practitioners. For instance, communication leaders rate their own performance as leaders far higher than their subordinate peers do.

Falkheimer (2014) has discussed how organisational leaders have to communicate complex phenomena such as values, norms, visions, overall goals and organisational identity through a wide set of instruments both within and outside the organisation. It is therefore unsurprising from our findings that organisational culture is a determining factor for communication performance. From the results 76.5 per cent claim that their organisation values and practices diversity and inclusion; 63.0 per cent practice two-way communication with employees/members and 57.8 per cent confirm that their organisation shares decision-making power with employees/members. When comparing culture and leadership in different branches then companies and non-profits are ahead of governmental organisations. But agencies and consultancies lead this area across all measures – probably because they are generally smaller and less hierarchical due to their business models.

Potential leadership gap: Many decision-makers misunderstand communications and its value; many communicators leaders lack leadership skills

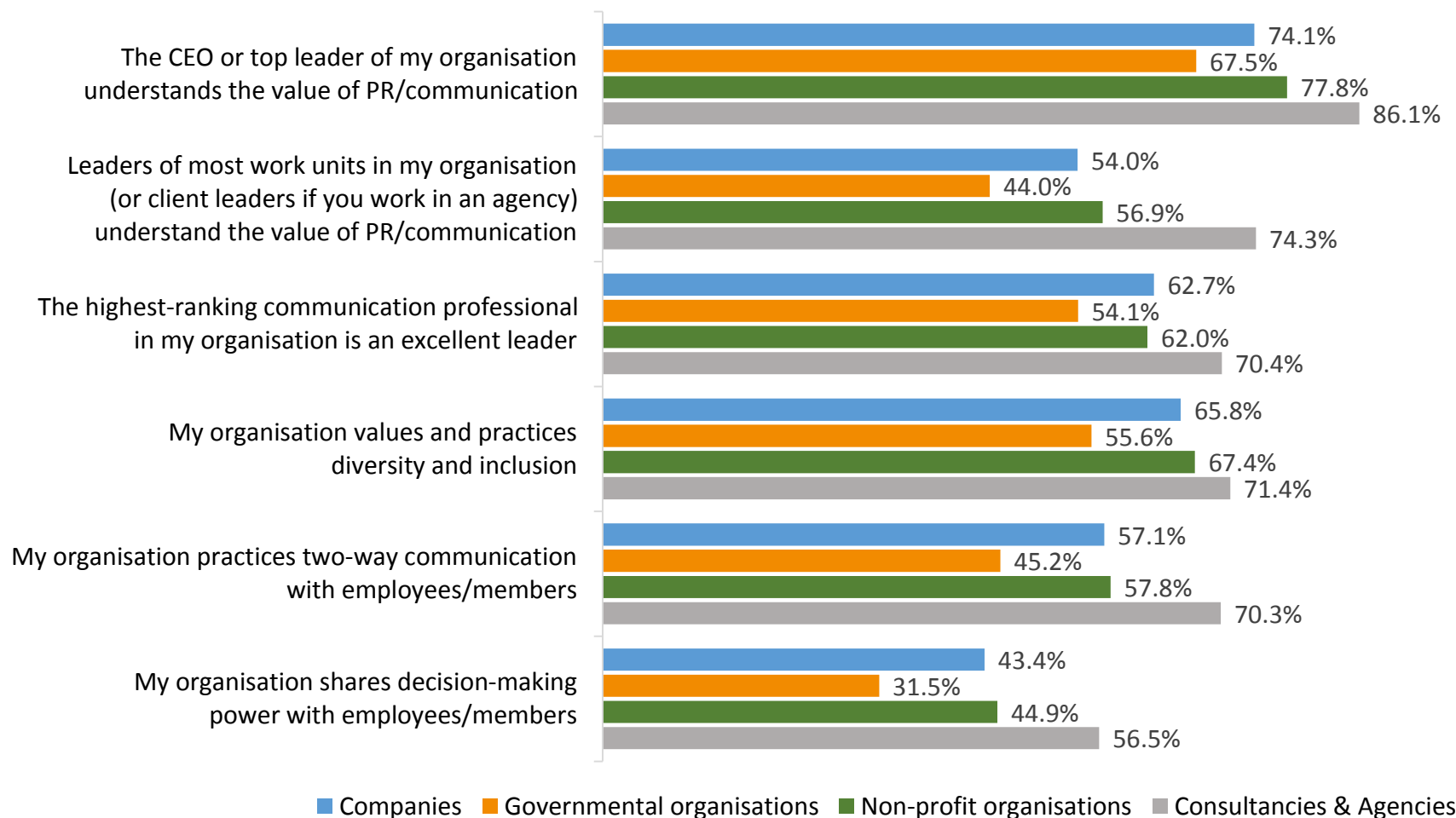


Organisational culture is a determining factor for communication performance



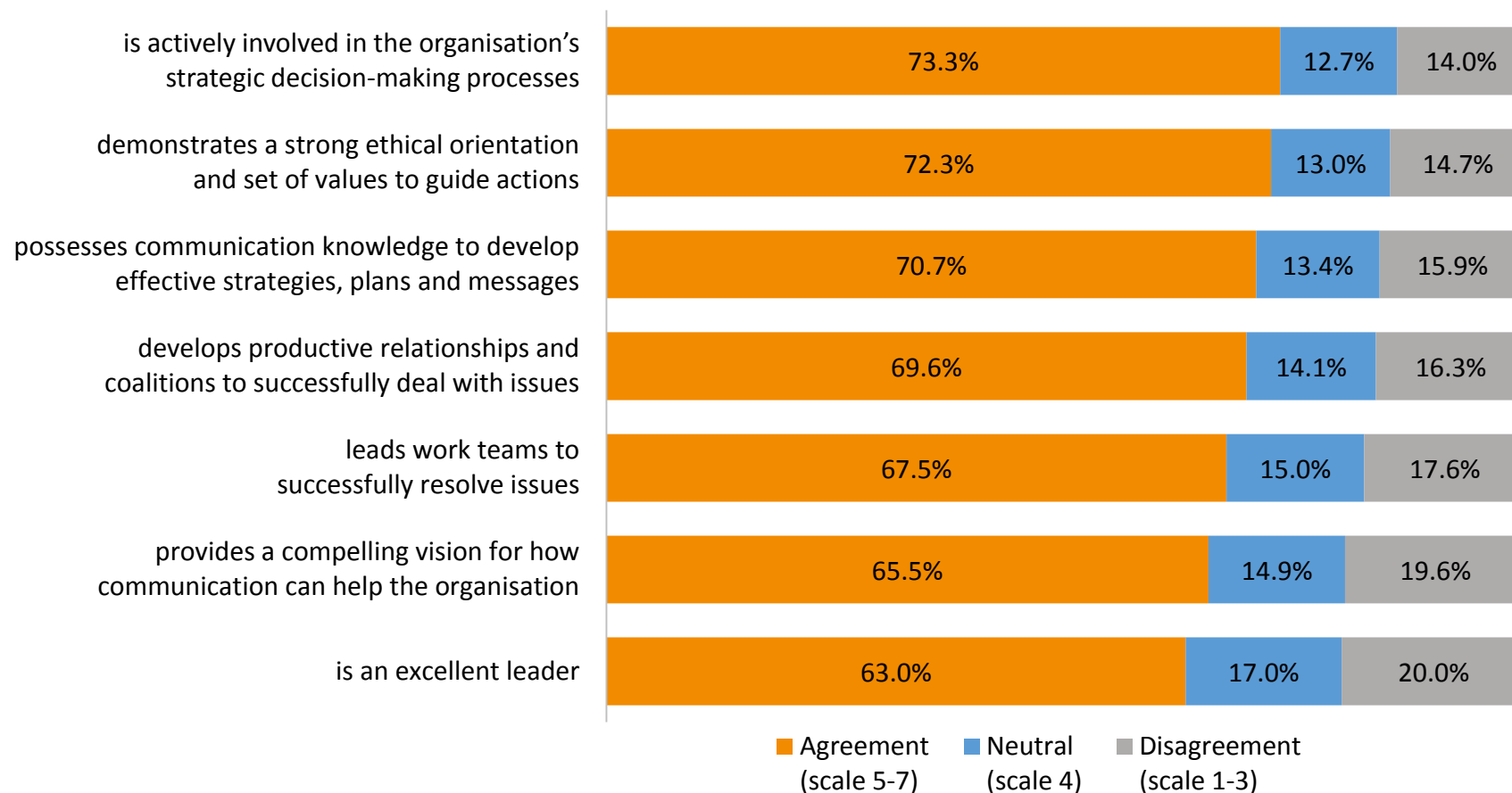
www.communicationmonitor.eu / Zerfass et al. 2018 / n = 3,096 communication professionals. Intro: The next section deals with your perceptions about leadership performance in public relations and communication management in your organisation. We use the term 'leader' for an individual who is responsible for organising and leading a group, unit or entire function to help an organisation achieve its objectives. Q 11: Please evaluate aspects of the communication structure and culture of your organisation. Scale 1 (I don't agree at all) – 7 (I agree to a very great extent).

Culture and leadership in different types of organisations: Companies are ahead of governmental and non-profits; agencies are naturally leading the field



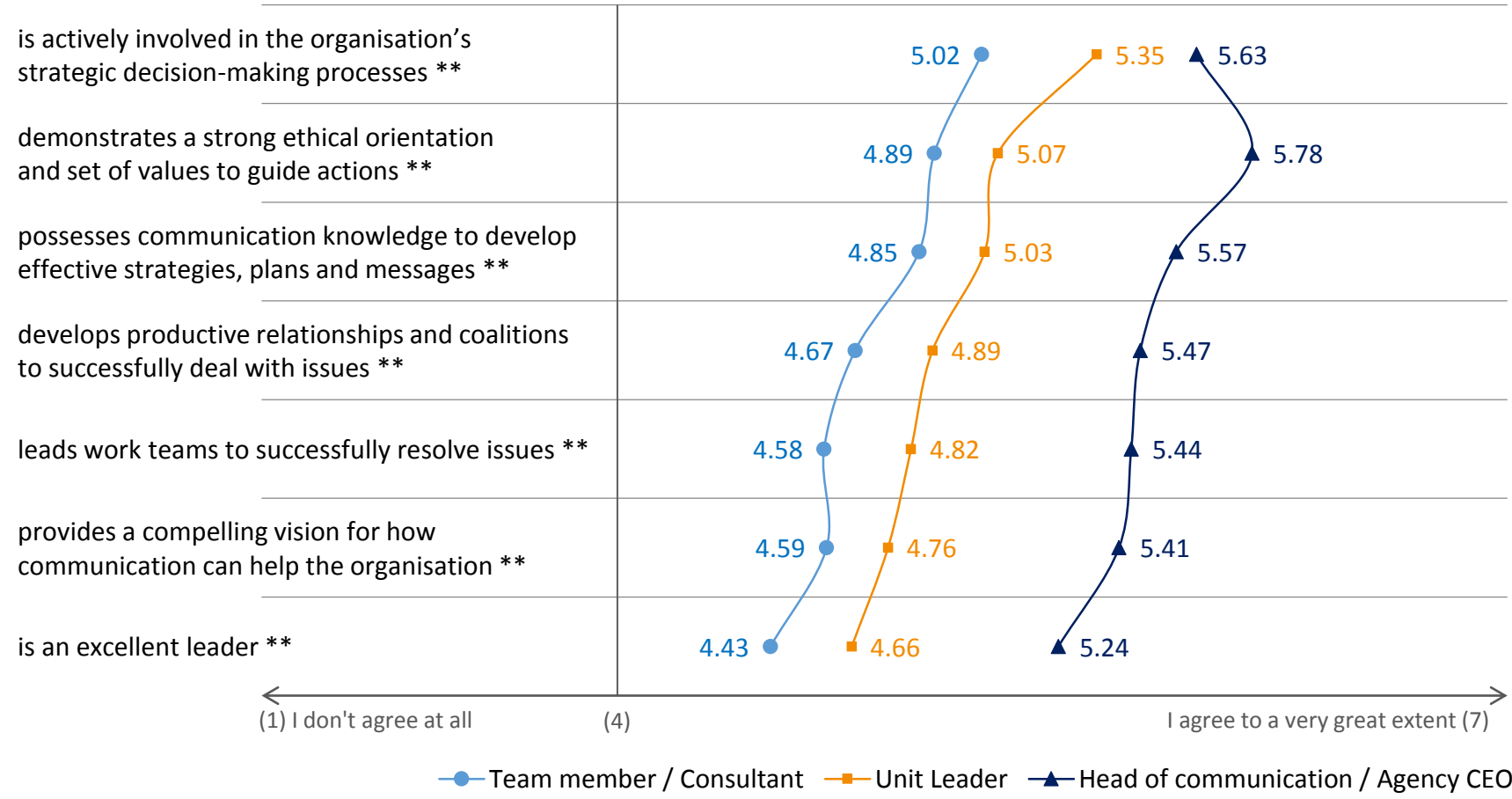
Performance of communication leaders

The highest ranking communication professional in the work group, unit or function ...



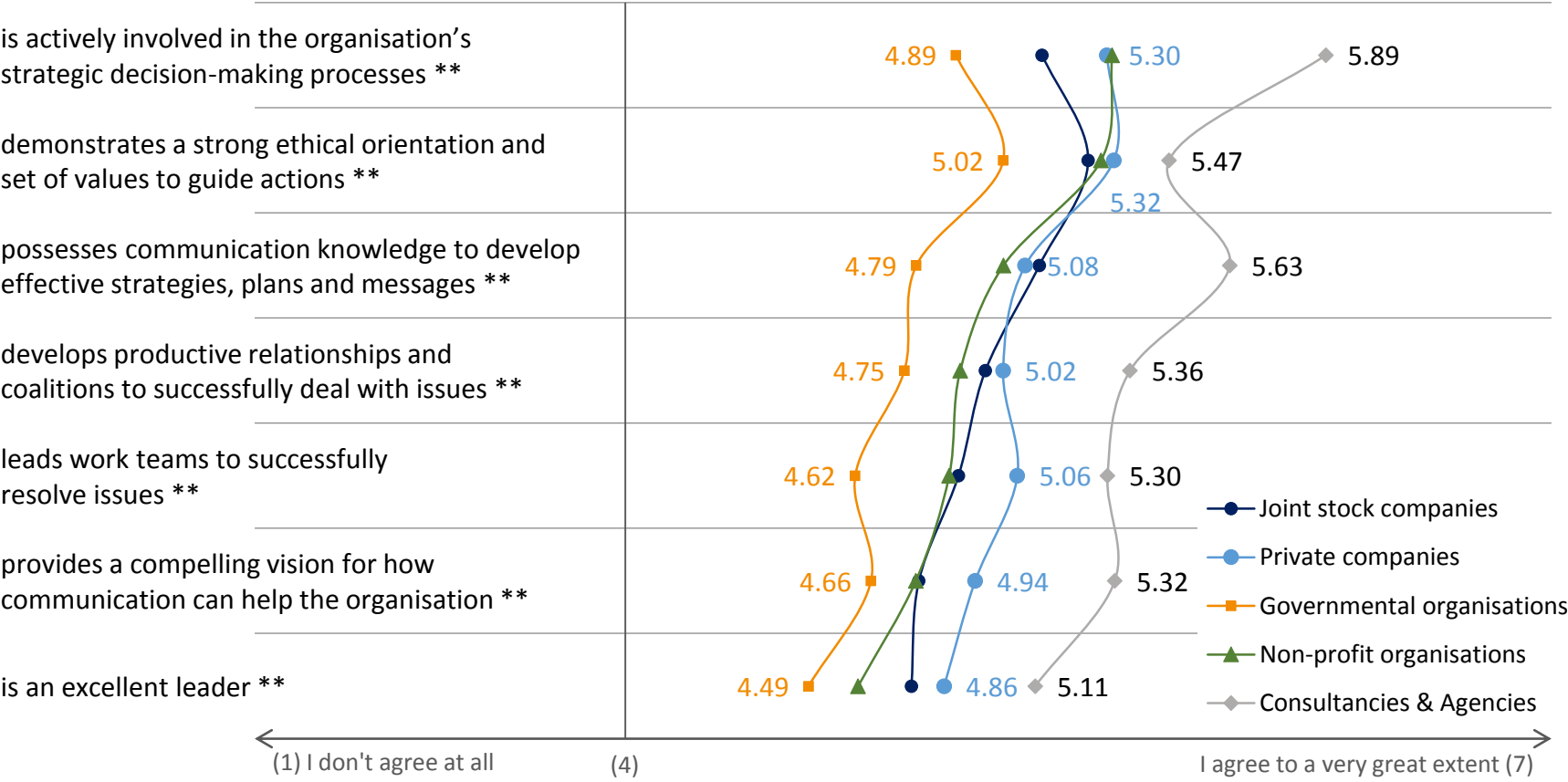
Communication leaders rate their own performance much better than professionals on lower levels of the hierarchy

The highest ranking communication professional in the work group, unit or function ...



Performance of communication leaders in different types of organisations: Governmental organisations are lagging behind

The highest ranking communication professional in the work group, unit or function ...



www.communicationmonitor.eu / Zerfass et al. 2018 / n = 3,096 communication professionals. Q 12: Please assess the performance of your leader (the highest-ranking communication or PR professional in your work group, unit or function). If you are that leader, please self-evaluate for this question. Scale 1 (I don't agree at all) – 7 (I agree to a very great extent). ** Highly significant differences (ANOVA/Scheffe post-hoc test, p ≤ 0.01).

**Work engagement
and trust in the
organisation**



Chapter overview

Besides enabling change and fostering a collaborative organisational culture, stimulating employee engagement (Bailey et al., 2017) is one of the most important goals of internal communications (Mazzei, 2014; Tkalac Verčič & Pološki Vokić, 2017; Zeffass & Viertmann, 2017). However, engagement is not only a goal but also a prerequisite for communication departments and agencies. Only engaged communication professionals will be able to handle the complex challenges of today's volatile economic, political and media environments. Their level of engagement is also an indicator for the performance of communication leaders and units.

This year's monitor measured the work or job engagement of communication practitioners in Europe. The widely used Gallup scale to measure employee engagement provided by Bakker and Leiter (2010, p. 16) was adapted and slightly modified for our study. The overall job engagement index based on the assessment of 12 different statements shows that the majority of respondents feel engaged in their job (56.1 per cent). But more than one third does not feel engaged (37.1 per cent) and every 15th practitioner is even actively disengaged (6.8 per cent). Over two thirds of the communicators surveyed know what is expected of them at work, are in an environment with other people that are committed to quality work, their opinions count, the purpose of their organisation makes them feel that their job is important, they learn and grow, they are monitored and held responsible, feel recognised and praised, feel that their supervisor cares for them and have the opportunity to do what they do best every day. On the more negative side almost one quarter of the respondents (24.5 per cent) say they don't have the resources to do their job effectively and more 21.6 per cent do not feel encouraged by their leaders.

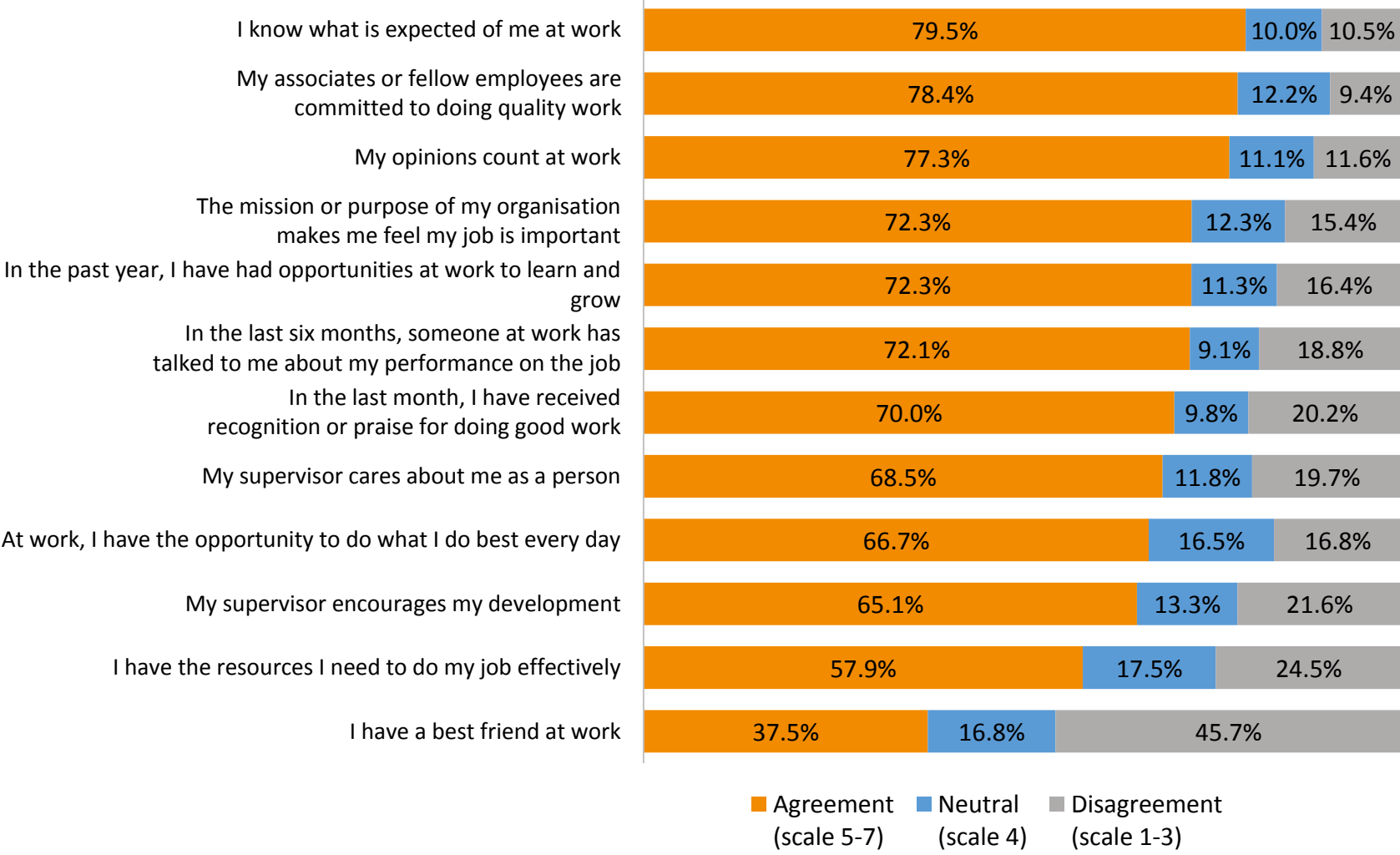
Engagement is generally higher in companies and consultancies compared to governmental and non-profit organisations with a highly significant exception: practitioners working in non-profits and governmental or political bodies feel much more that their job is important due to the mission or purpose of their organisation. Not surprisingly, engagement correlates positively with the hierarchical level. Heads of communication departments and consultancies feel more engaged than team members, and so do team leaders. Although the overall job engagement does not vary too much between European countries, the assessment of getting support from leaders for personal development shows very significant differences.

Trusting the organisation you work for has been considered one of the aspects of excellent communication, not least because organisational trust has a positive influence on overall job satisfaction. Based on Hon and Grunig's (1999) instrument, the work trust of European communication practitioners was measured. Professionals working in agencies have more trust in their organisation than professionals working in other types of organisations. Around two thirds of the respondents feel very confident in their organisation's skills, the ability to accomplish what it says it will, to keep promises and that their organisation treats people fairly and justly. Concerns are felt whether organisations take opinions of communication people into account when taking decisions or that it will think about them when making important decisions. Around a quarter of the practitioners do not seem to think so (26.3 per cent).

To conclude we can say that communication professionals in Europe have a medium job engagement and the trust they have in the organisation they work also leaves room for improvement. For a more detailed interpretation, however, these data need to be compared with insights for other professions and departments/units, and ultimately surveys have to be conducted on the level of specific organisations and industries.

Job engagement of communication professionals in Europe

What practitioners report about their work experience



Professionals working in agencies and companies are more engaged than peers in non-profit and governmental organisations



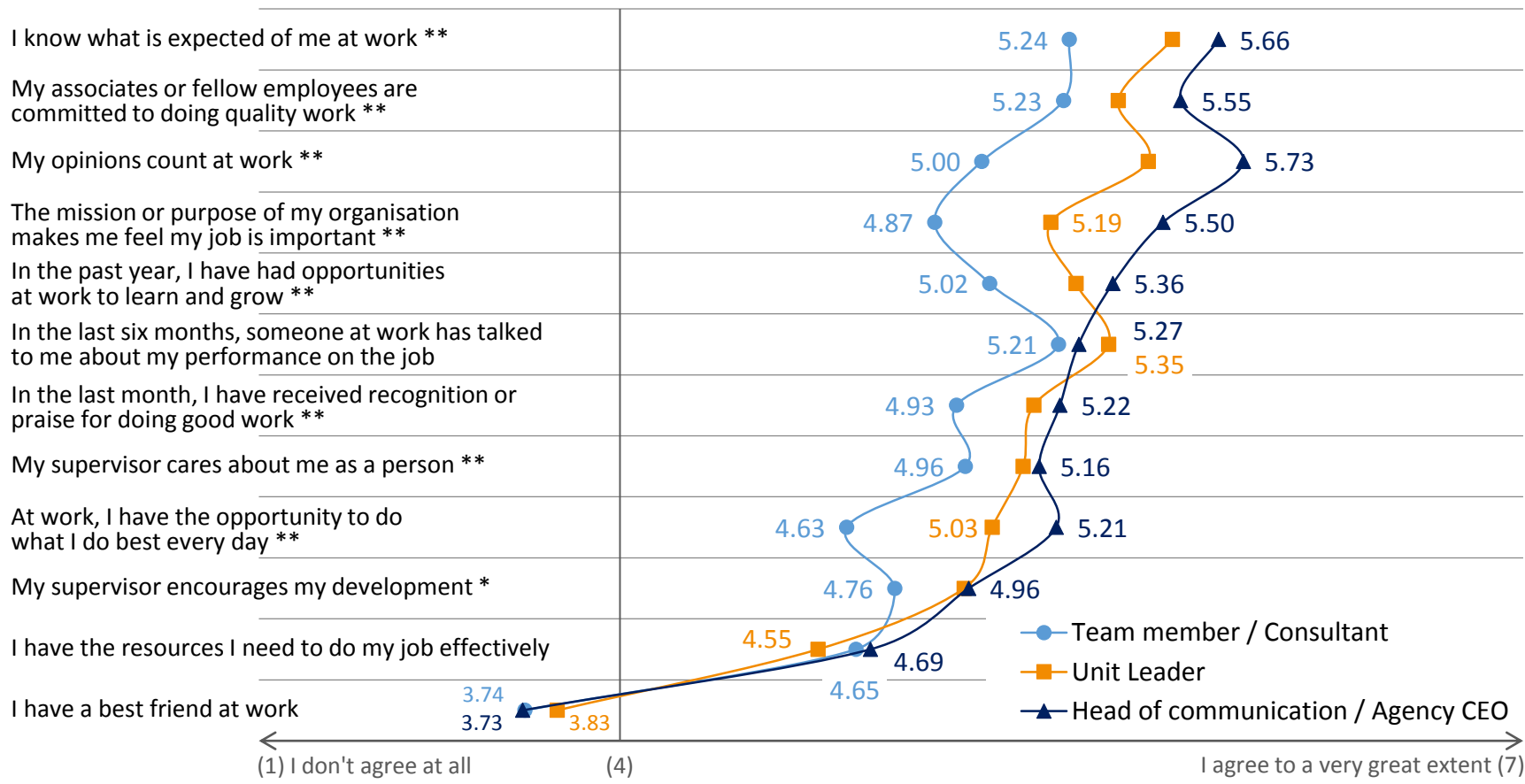
Job engagement in Western and Northern Europe

	The mission or purpose of my organisation makes me feel my job is important **	In the last six months, someone at work has talked to me about my performance on the job **	My supervisor encourages my development **	I have the resources I need to do my job effectively *	Job engagement overall (average mean)
Germany	5.16	5.63	4.92	4.85	5.20
Austria	5.20	5.37	4.66	4.28	5.00
Switzerland	5.34	5.75	4.93	4.42	5.22
France	5.18	5.59	5.04	4.20	5.03
Belgium	5.18	5.28	5.00	4.50	4.99
Netherlands	5.46	5.71	5.15	4.93	5.31
United Kingdom	5.15	5.12	4.64	4.27	4.84
Ireland	5.11	4.71	4.94	4.24	4.91
Denmark	5.52	5.33	4.84	4.46	5.08
Sweden	5.91	5.60	5.02	4.77	5.17
Norway	5.87	5.62	5.05	4.64	5.24
Finland	5.70	5.47	5.22	4.72	5.18

Job engagement in Southern and Eastern Europe

	The mission or purpose of my organisation makes me feel my job is important **	In the last six months, someone at work has talked to me about my performance on the job **	My supervisor encourages my development **	I have the resources I need to do my job effectively *	Job engagement overall (average mean)
Spain	4.95	5.33	4.96	4.63	5.06
Portugal	4.95	4.89	4.73	4.29	4.80
Italy	4.69	4.62	4.26	4.13	4.61
Slovenia	5.32	5.46	5.10	5.07	5.19
Croatia	4.90	4.75	4.69	4.58	4.77
Serbia	5.04	5.07	4.92	4.85	4.96
Poland	4.82	5.05	4.46	4.77	4.76
Czech Republic	4.89	5.31	4.84	5.07	5.00
Romania	5.09	5.35	5.40	5.07	5.28
Russia	5.28	4.47	4.64	4.94	4.92

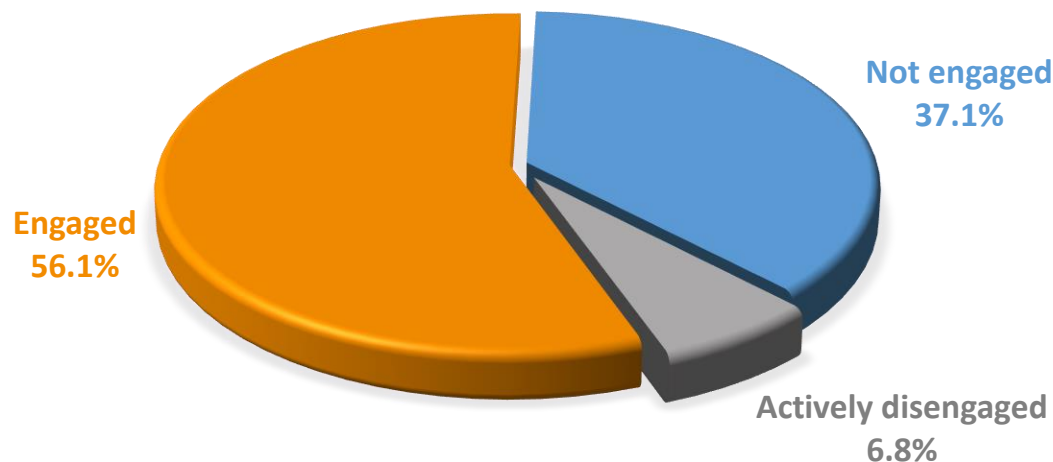
Engagement correlates significantly with hierarchies: Communication department and agency heads and team leaders are more engaged than team members



www.communicationmonitor.eu / Zerfass et al. 2018 / n = 2,939 communication professionals. Q 13: Please share perceptions about your work engagement. Scale 1 (I don't agree at all) – 7 (I agree to a very great extent). Scale adapted and slightly modified from Bakker and Leiter (2010, p. 16) (Gallup Q12). Mean values.
* Significant differences (Kendall rank correlation, p ≤ 0.05). ** Highly significant differences (Kendall rank correlation, p ≤ 0.01).

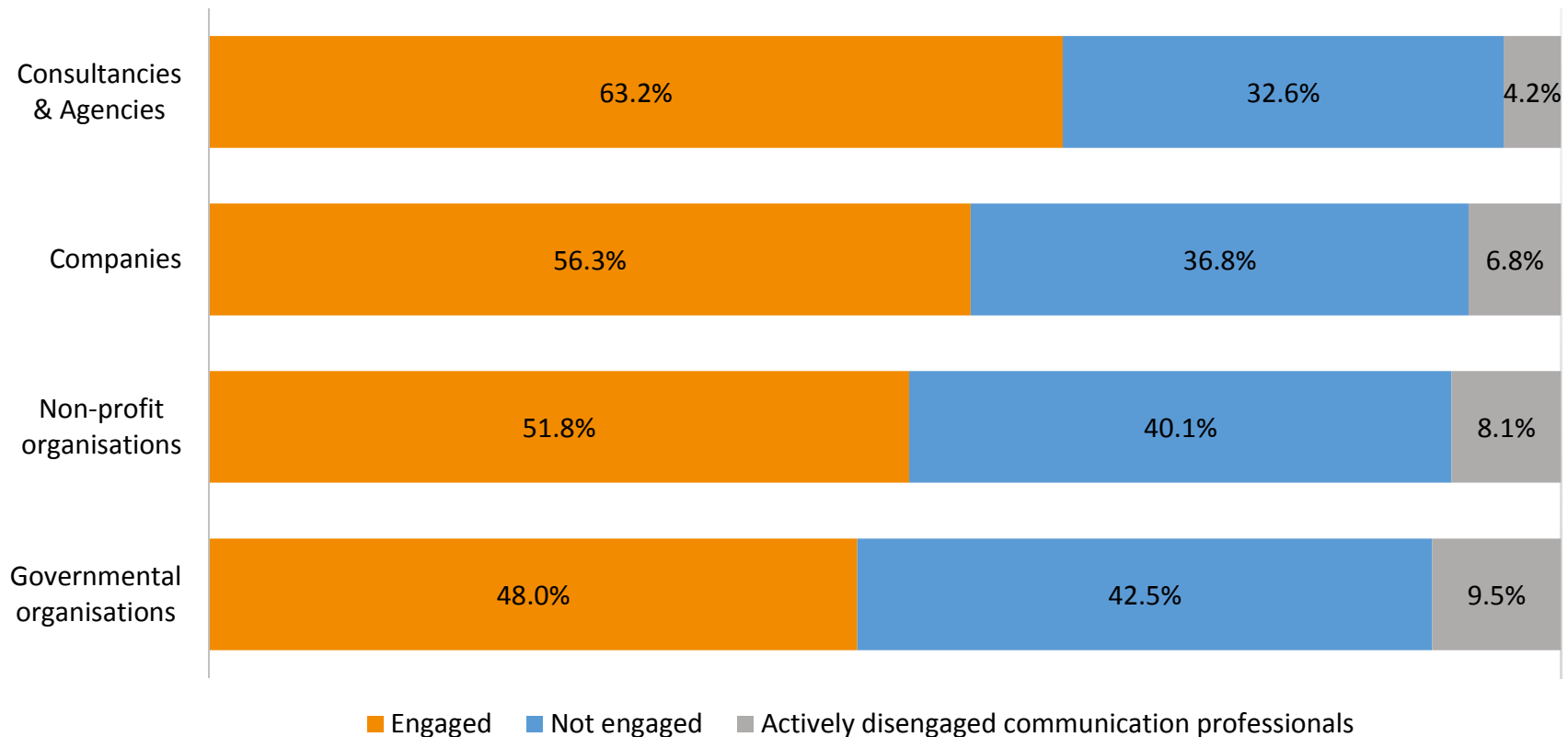
Job engagement index: 56 per cent of communication professionals are engaged, while less than 7 per cent are actively disengaged

Communication professionals' overall level of work engagement in Europe



www.communicationmonitor.eu / Zerfass et al. 2018 / n = 3,096 communication professionals. Q 13: Please share perceptions about your work engagement. For reliability analysis, Cronbach's alpha was calculated to assess the internal consistency of the subscale for positive affect, which consists of 12 questions. The internal consistency of the item battery is satisfying, with Cronbach's alpha for positive affect = 0.910. Engaged: average mean > 5.00; not engaged: 2.92 < average mean ≤ 5.00; actively disengaged: average mean ≤ 2.92.

Overall work engagement of European communication professionals in different types of organisations: Agencies are leading the field

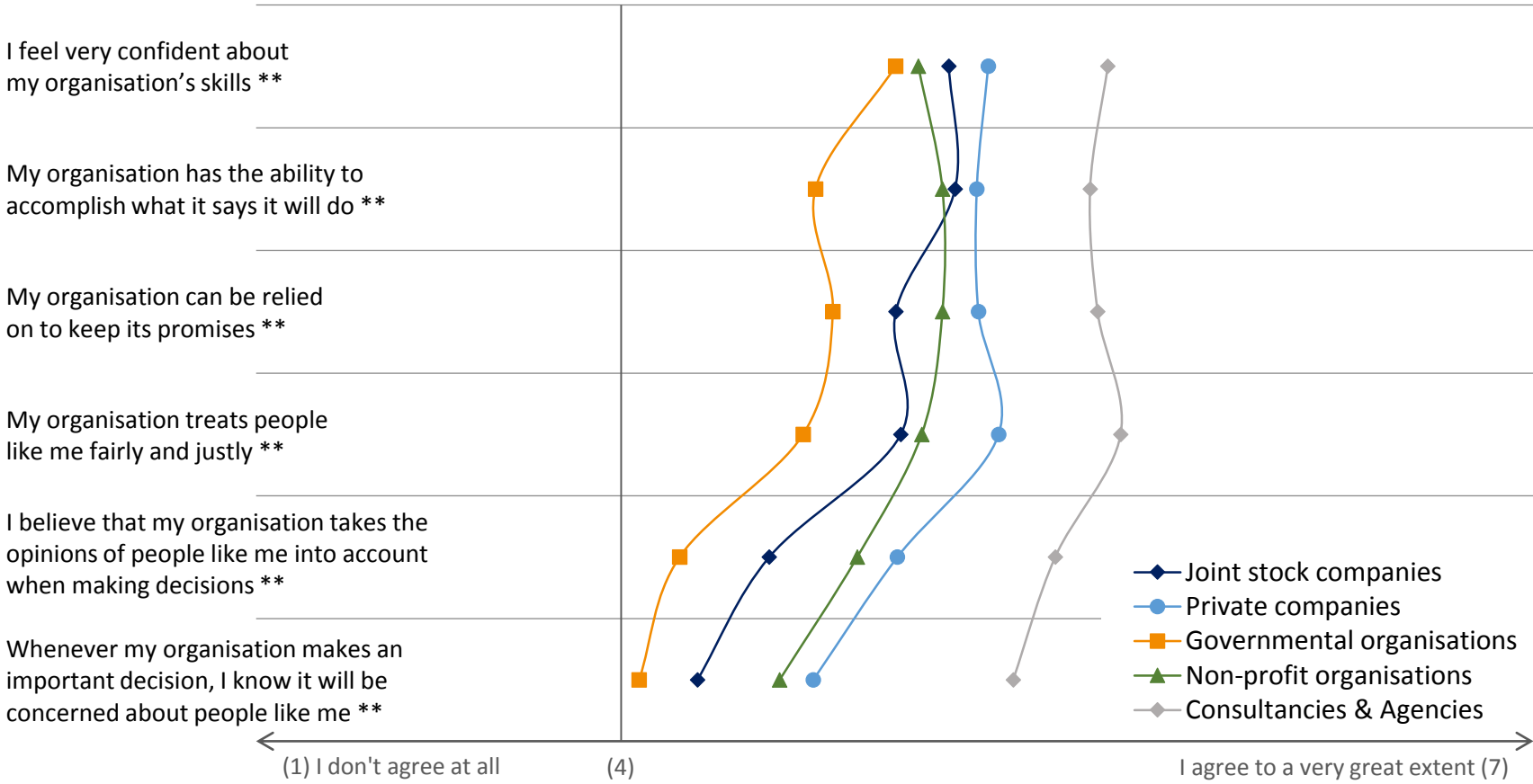


www.communicationmonitor.eu / Zerfass et al. 2018 / n = 3,096 communication professionals. Q 13: Please share perceptions about your work engagement. For reliability analysis, Cronbach's alpha was calculated to assess the internal consistency of the subscale for positive affect, which consists of 12 questions. The internal consistency of the item battery is satisfying, with Cronbach's alpha for positive affect = 0.910. Engaged: average mean > 5.00; not engaged: 2,92 < average mean ≤ 5.00; actively disengaged: average mean ≤ 2.92. Highly significant differences (chi-square test, $p \leq 0.01$, Cramér's $V = 0.084$).

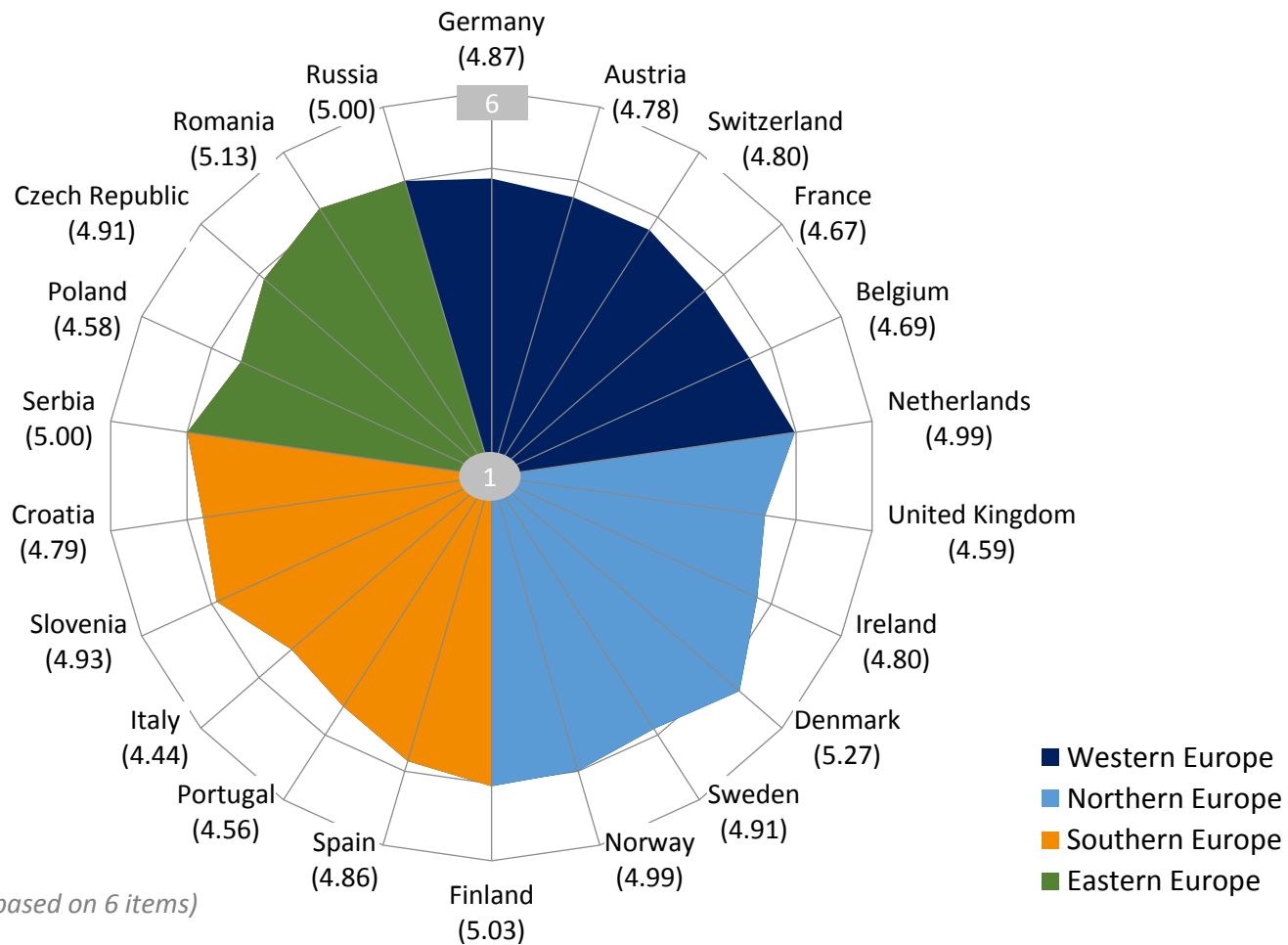
Work trust: How communication professionals trust their own organisation



Professionals working in communication agencies hold much more trust in their organisations than peers working in companies, non-profits and government



How communication professionals trust their own organisations across Europe



Scale: 1-7 (average mean based on 6 items)

**Stress at work and
factors driving it**



Chapter overview

Contemporary discussions of the changing working world and its impact on communication practitioners is often discussed in the context of technology (Moreno et al., 2015), gendered work experiences (Tench et al., 2017) as well as in societal employment debates such as those currently focused on presenteeism (Hirsch et al., 2017). Some or all of these employment issues can be factors for raising or increasing stress on employees (Ganster & Rosen, 2013; Siegrist, 2010).

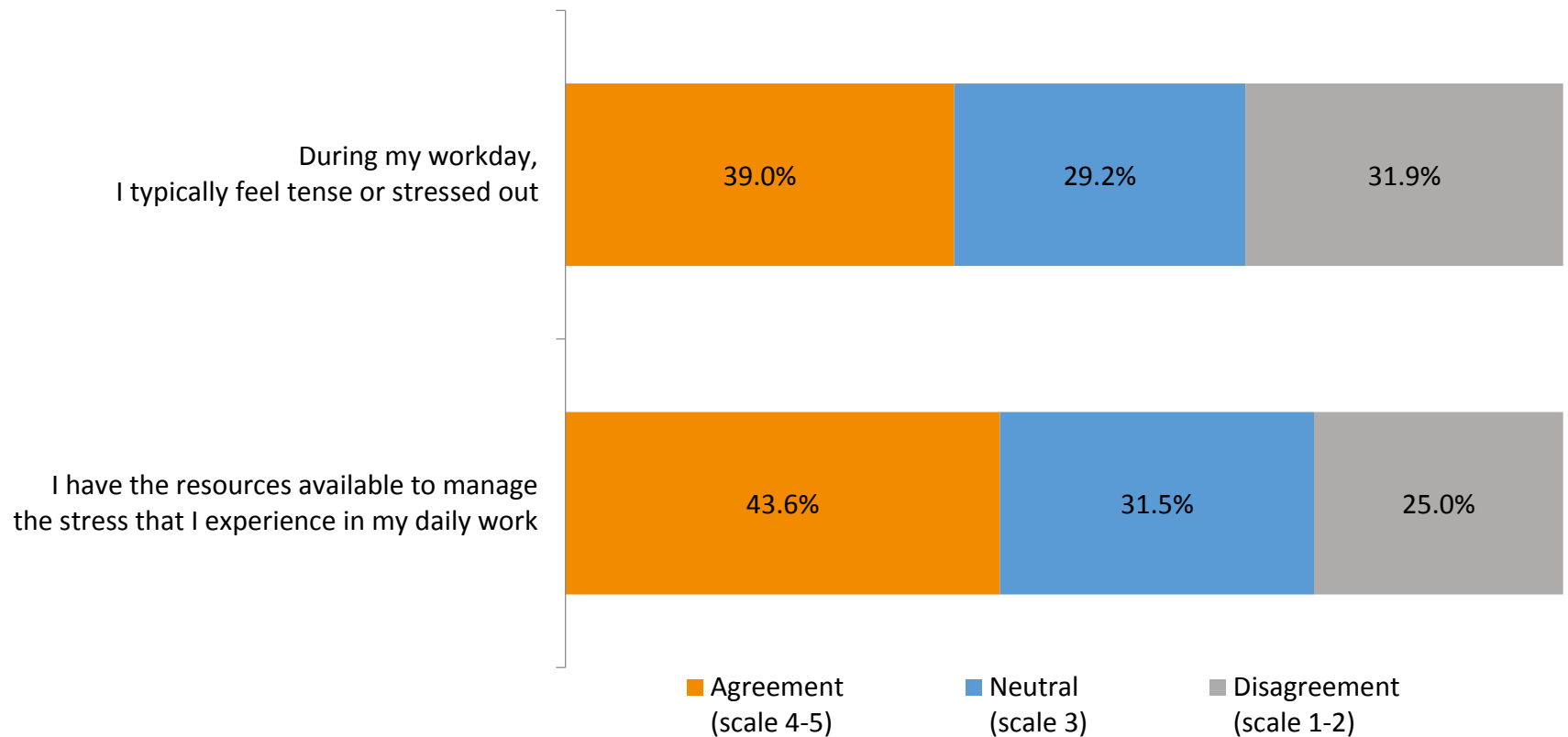
Added to this debate is the fact that communication professionals are often expected to be high performers in a hard-working culture. For example, communicators are often described as multi-tasking facilitators within organisations. The final part of our book on communication excellence identified the characteristics of an ideal or ‘excellent’ practitioner based on previous data from the monitor studies (Tench et al., 2017, pp. 133-191). These individuals were described as being able to manage the complex, dynamic context and functions of their organisation as they will possess the cognitive, technical, social and communication skills to gain the confidence of colleagues from other sectors and functions. They will facilitate communication within their organisation, as well as with external publics; they will be able to advise senior management using their higher-level skills as well as oversee more detailed hands-on activity; they will be committed to lifelong learning and continual professional development; and they will also educate others about the value of PR and communications. Potentially quite a challenge. So, with all those demands how do European practitioners perform against this ‘ideal’ and what drivers of stress do they experience and how do they manage them?

In response to questions of personal stress four out of ten communication professionals (39.0 per cent) in Europe reported feeling tense or stressed out during their working day. At the same time a quarter (25.0 per cent) responded that they did not have the appropriate resources to manage the daily stress they experience. Considering work levels and stress, team members are less stressed than their superiors although communication leaders are better equipped to handle stress. Overall a cluster analysis of practitioners identifies two groups of communication professionals with one in four (27.9 per cent) experiencing serious stress problems and the majority (72.1 per cent) having no or manageable stress problems. The largest proportion of practitioners with serious stress problems – i.e., feeling stressed without having resources to cope with it – are based in Portugal, France, and Austria.

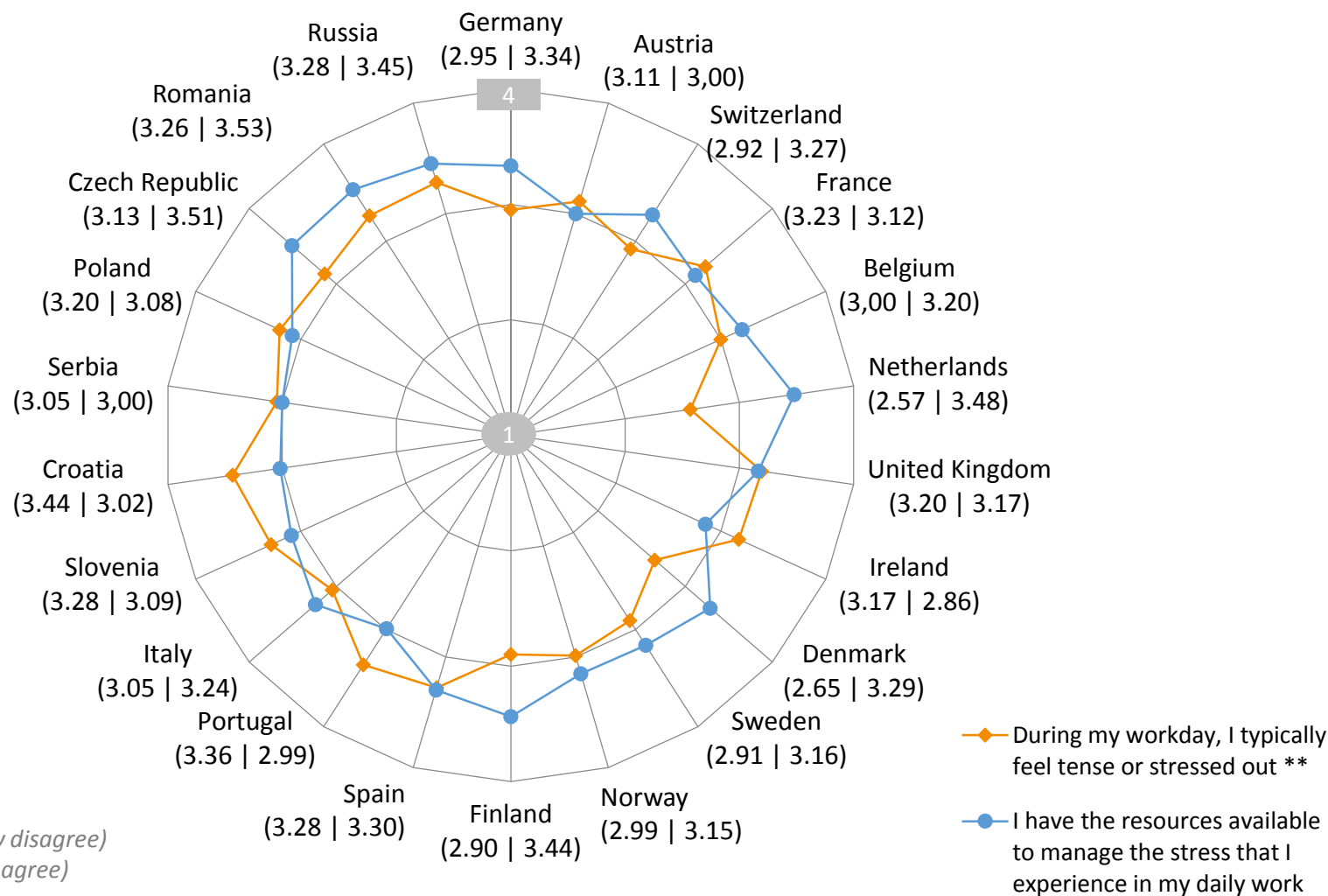
Referring to gender differences in work, female communicators (40.8 per cent) feel more stressed than their male colleagues (36.5 per cent). Adding to this, the ratio of women with serious stress problems identified through a cluster analysis (30.0 per cent) is also larger than the share in the male group (24.9 per cent). Age is another factor with professionals aged between 30 and 39 years having the highest stress problems compared to other age groups.

Linking back to debates from business and management literature the main drivers of work stress are the need to be constantly available outside working time to access emails and phone calls (35.6 per cent), work load (35.5 per cent) and lack of opportunity for growth or advancement (34.0 per cent). Threats of physical illness and personal life interfering during work time are only rated significant by one out of ten respondents (11.4 and 11.3 per cent, respectively). 30.4 per cent, however, say that work interfering during personal or family time causes stress. Reasonable practices to decouple professional and private activities might help to solve such problems and reduce stress in the communication workforce.

Work stress: four out of ten communication professionals in Europe feel stressed and one quarter lacks resources to deal with the situation

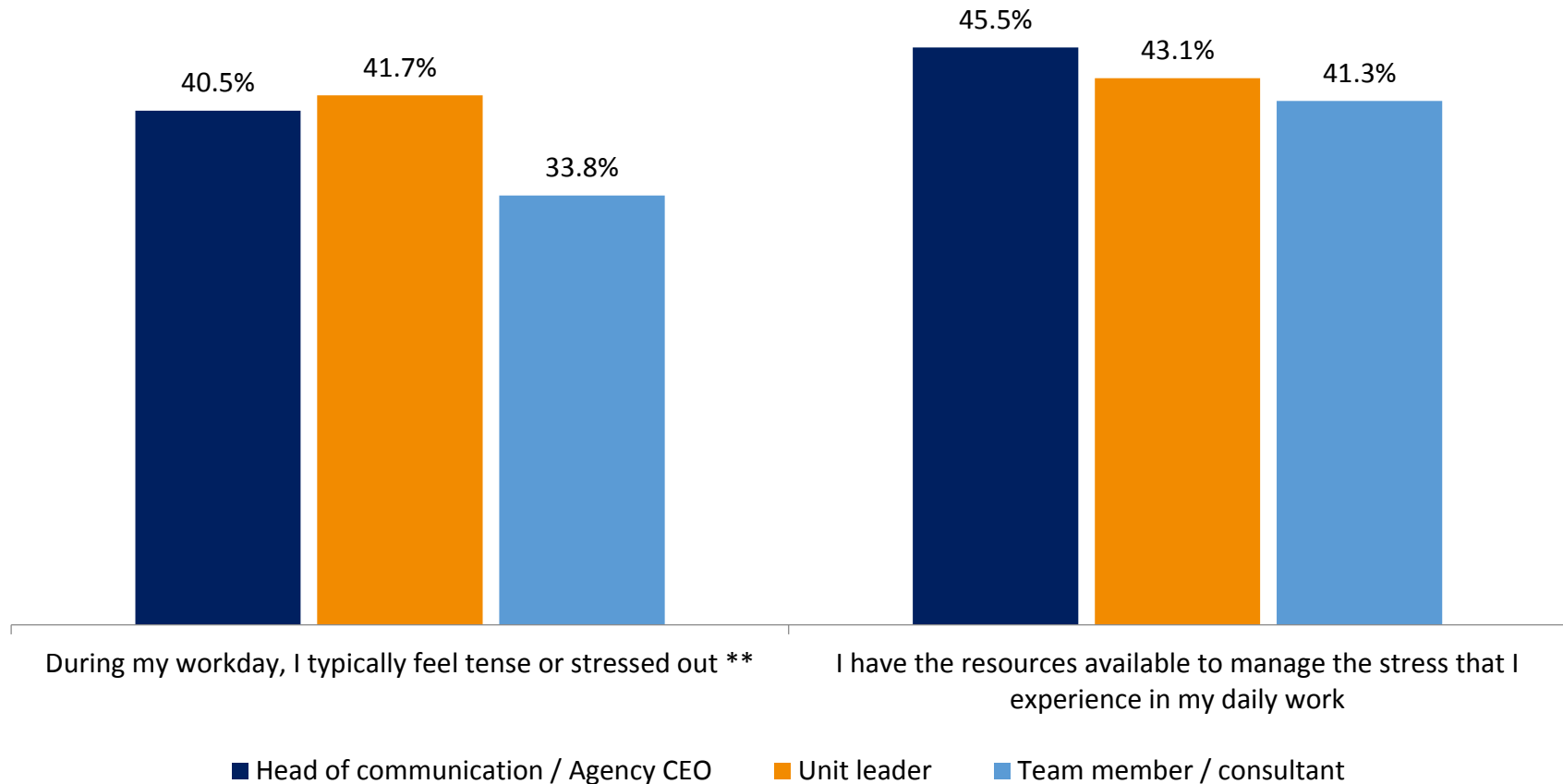


Different levels of work stress and the ability to manage it across Europe

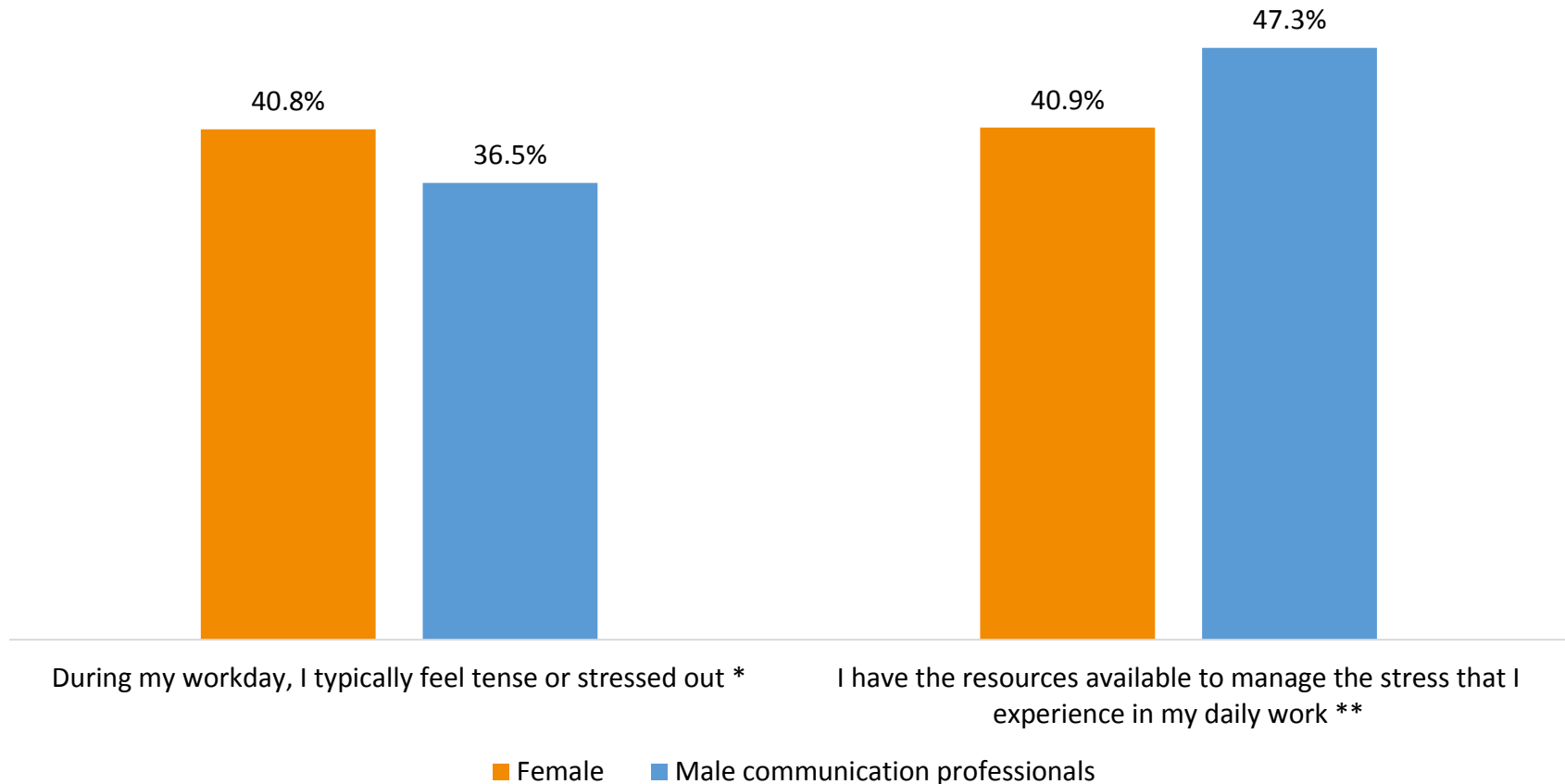


www.communicationmonitor.eu / Zerfass et al. 2018 / n ≥ 2,734 communication professionals from 22 countries. Q 17: How much do you agree or disagree with the following statements? Scale 1 (Strongly disagree) – 5 (Strongly agree). Scale and items derived from the Workplace Survey developed by the American Psychological Association and Harris Interactive (2012, p. 16). ** Highly significant differences (ANOVA/Scheffe post-hoc test, p ≤ 0.01).

Second line managers face more stress and hold less resources to deal with it; team members are less stressed; top leaders are better equipped to handle stress

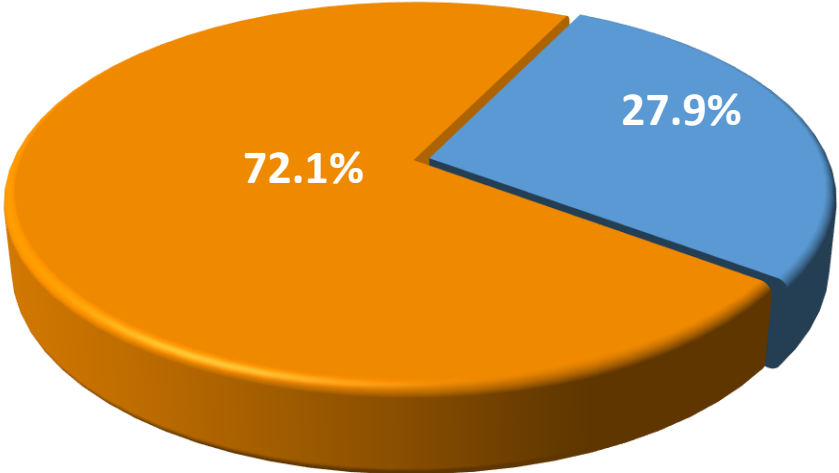


Gender and work stress in communications: female colleagues report more stress in their daily work and less resources to deal with it



Cluster analysis identifies two key groups of communication professionals: one quarter has serious stress problems, the majority has none or can handle it

No or manageable stress problems

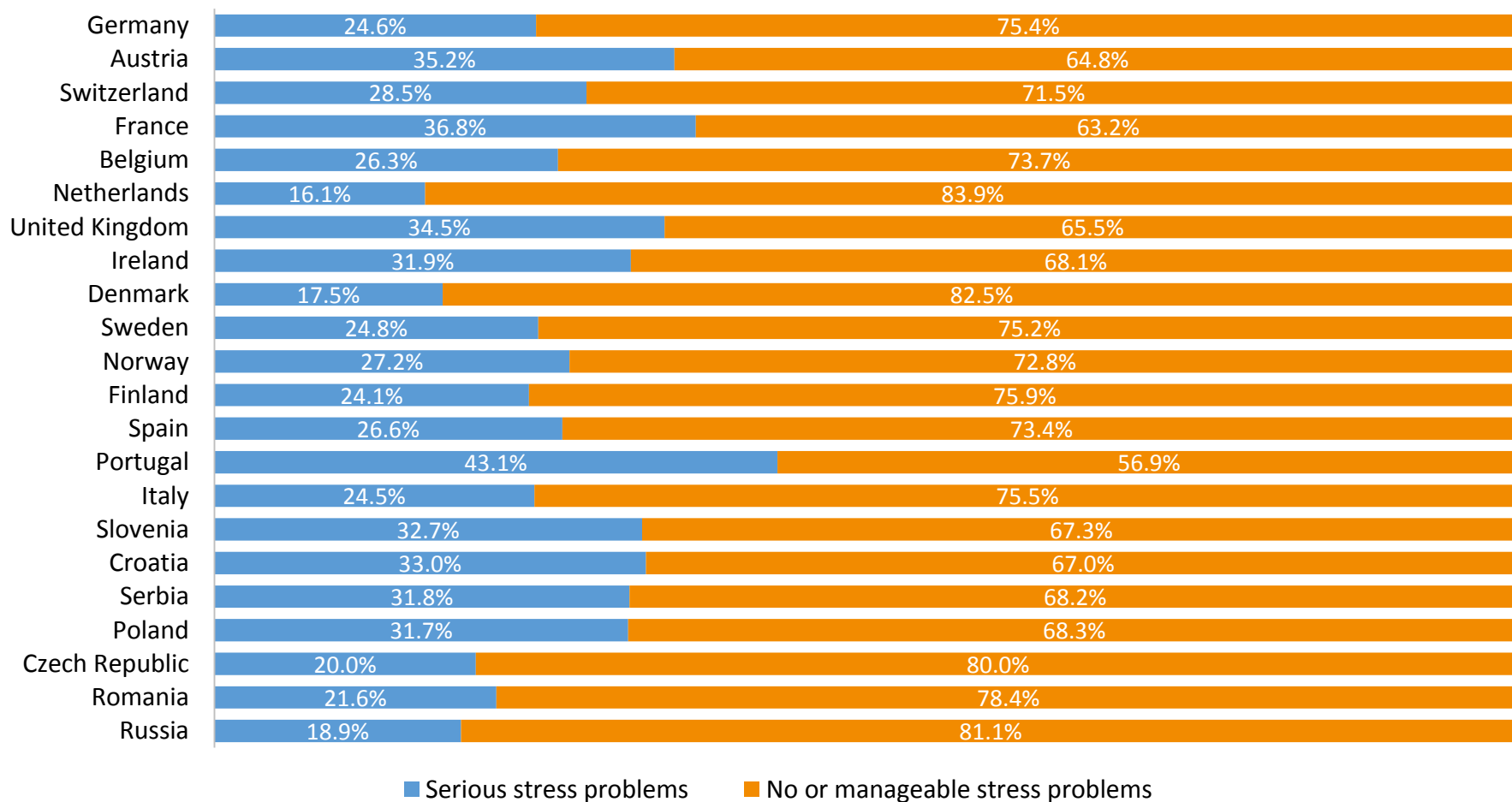


Serious stress problems

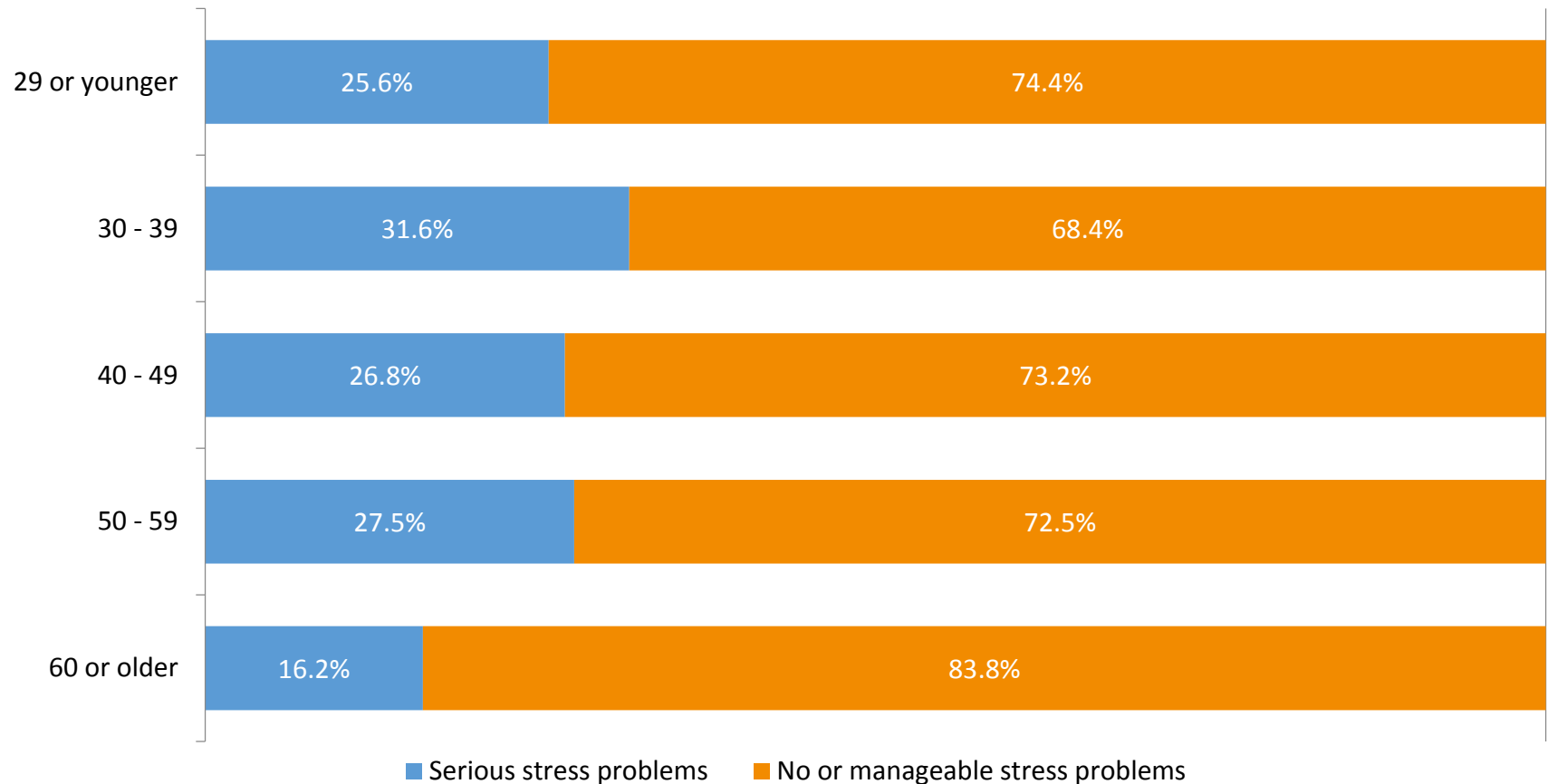
Cluster analysis		I have the resources available to manage the stress that I experience in my daily work				
		Strongly disagree (1)	(2)	(3)	(4)	Strongly agree (5)
During my workday, I typically feel tense or stressed out	Strongly disagree (1)	0.7%	0.6%	1.0%	3.0%	3.0%
	(2)	0.6%	3.0%	5.9%	11.5%	2.6%
	(3)	0.7%	4.2%	12.7%	9.6%	2.0%
	(4)	1.5%	8.3%	9.3%	7.8%	1.2%
	Strongly agree (5)	2.2%	3.2%	2.6%	1.8%	1.0%

www.communicationmonitor.eu / Zerfass et al. 2018 / n = 3,072 communication professionals. Q 17: How much do you agree or disagree with the following statements? Scale 1 (Strongly disagree) – 5 (Strongly agree). Scale and items derived from the Workplace Survey developed by the American Psychological Association and Harris Interactive (2012, p. 16). Hierarchical cluster analysis.

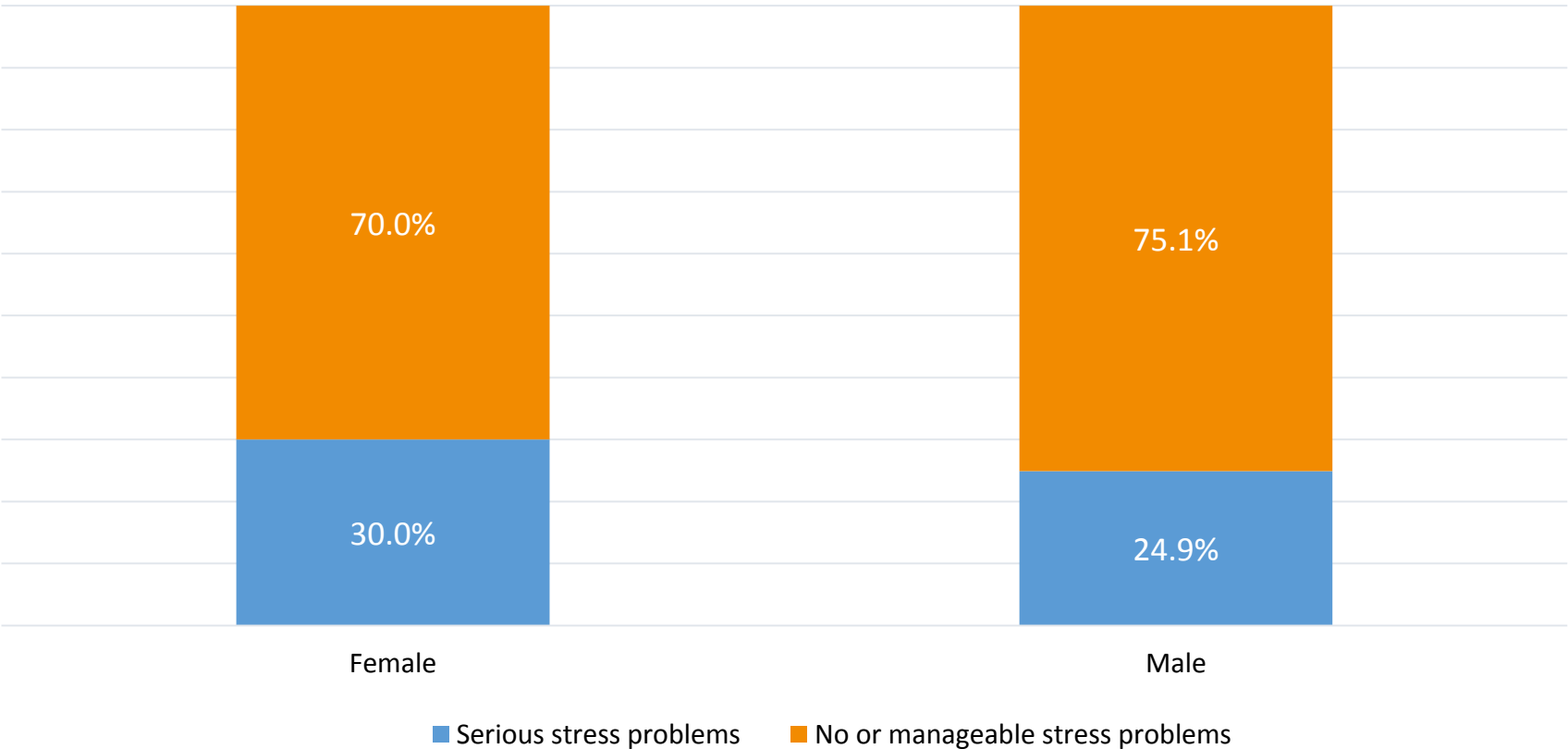
Work stress clusters across Europe: Portugal, France and Austria report the largest proportion of communication professionals with serious stress problems



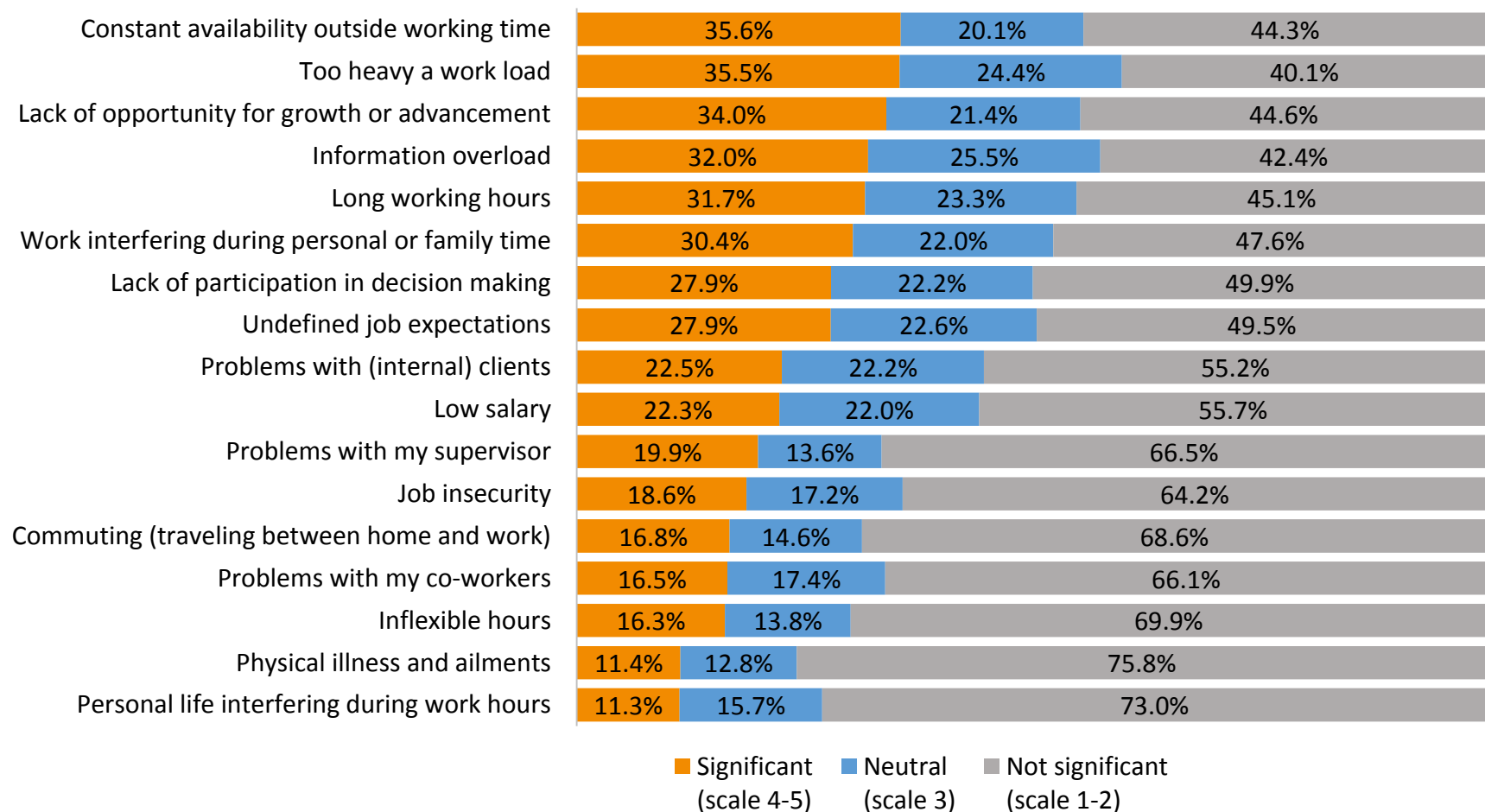
Communication professionals between 30-39 years have significantly more frequently experienced serious stress problems than peers in other age groups



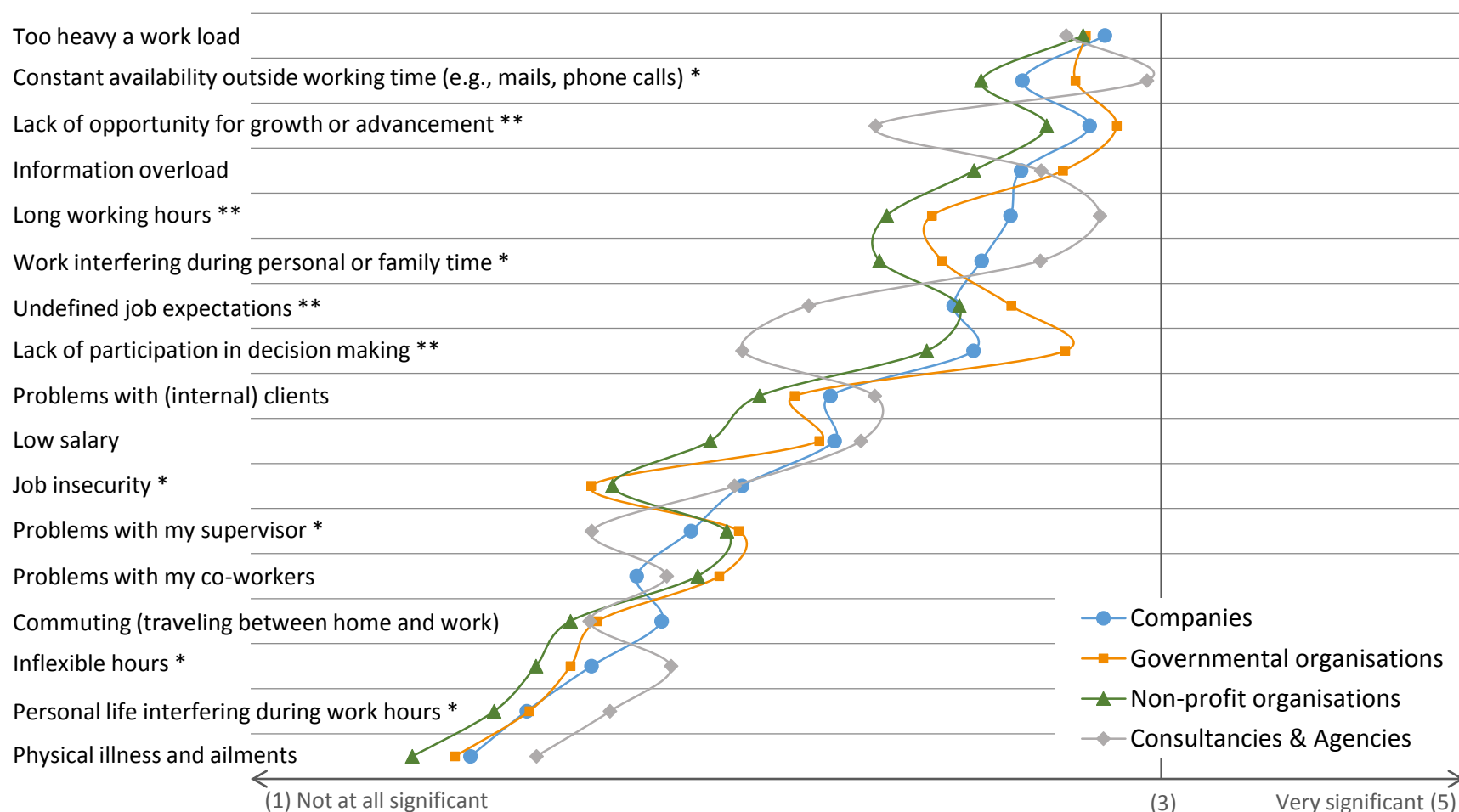
More female than male communication professionals are facing serious stress problems



Constant availability and work load are the main drivers for work stress in communications

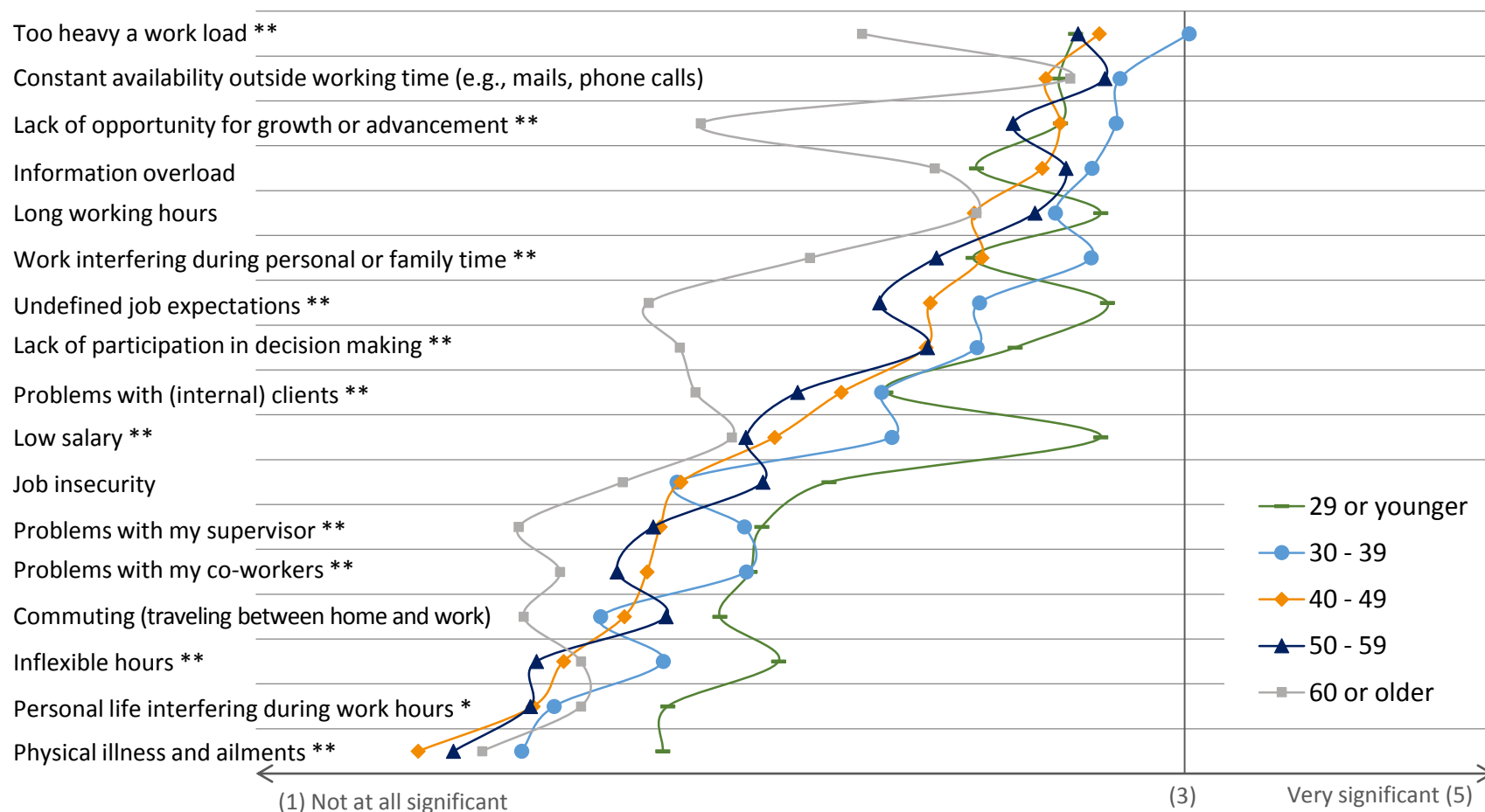


Stress factors for communication professionals in different types of organisations



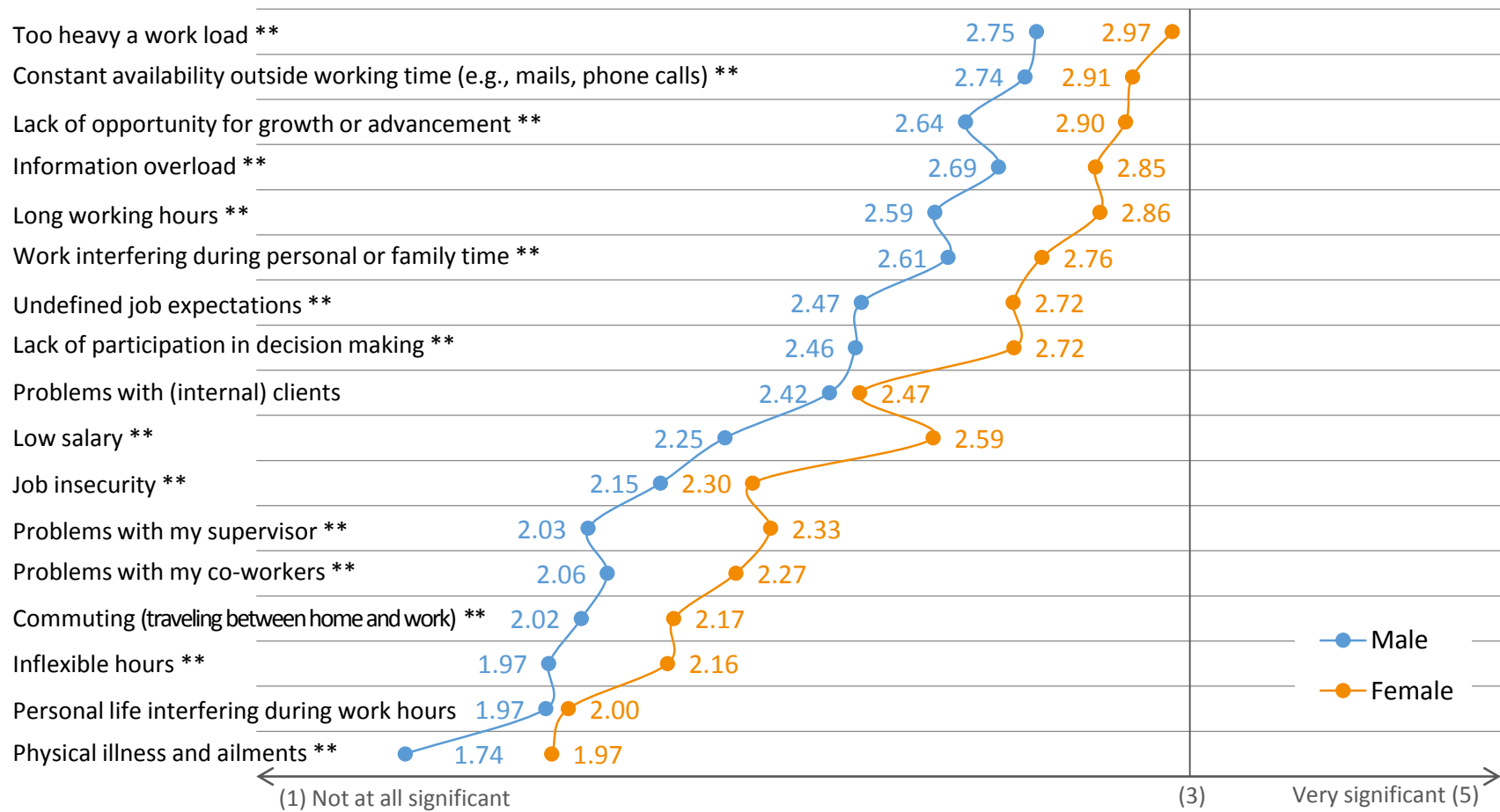
www.communicationmonitor.eu / Zerfass et al. 2018 / n ≥ 3,095 communication professionals. Q 18: Below is a list of factors people say impact stress levels in their work. For each one, please indicate how significant the impact is on your stress level at work. Scale 1 (Not at all significant) – 5 (Very significant). Scale and items derived from the Workplace Survey developed by the American Psychological Association and Harris Interactive (2012, p. 18) (one item deleted and two added). * Significant differences (ANOVA/Scheffe post-hoc test, $p \leq 0.05$). ** Highly significant differences (ANOVA/Scheffe post-hoc test, $p \leq 0.01$).

Stress factors for communication professionals in different age groups



www.communicationmonitor.eu / Zerfass et al. 2018 / $n \geq 3,085$ communication professionals. Q 18: Below is a list of factors people say impact stress levels in their work. For each one, please indicate how significant the impact is on your stress level at work. Scale 1 (Not at all significant) – 5 (Very significant). Scale and items derived from the Workplace Survey developed by the American Psychological Association and Harris Interactive (2012, p. 18) (one item deleted and two added). * Significant differences (ANOVA/Scheffe post-hoc test, $p \leq 0.05$). ** Highly significant differences (ANOVA/Scheffe post-hoc test, $p \leq 0.01$).

Assessment of stress factors by male and female communication practitioners



www.communicationmonitor.eu / Zerfass et al. 2018 / n = 3,090 communication professionals. Q 18: Below is a list of factors people say impact stress levels in their work. For each one, please indicate how significant the impact is on your stress level at work. Scale 1 (Not at all significant) – 5 (Very significant). Scale and items derived from the Workplace Survey developed by the American Psychological Association and Harris Interactive (2012, p. 18) (one item deleted and two added). * Significant differences (Independent samples T-Test, $p \leq 0.05$). ** Highly significant differences (Independent samples T-Test, $p \leq 0.01$).

**Job satisfaction and
willingness to change**



Chapter overview

An important driver of performance for organisations generally and communication units specifically is employee satisfaction (Chen & Arvey, 2016; Spector, 1997). There is surprisingly little knowledge about the satisfaction of communication professionals until now, although communications is clearly a 'people business' and leaders should know about the expectations and well-being of their team members. Previous research includes a few academic and industry studies in the United States (Kang, 2010; Ragan's PR Daily, 2013) and from earlier editions of the Global Communication Monitor series (Lwin & Zerfass, 2016; Macnamara et al., 2015, 2017; Moreno et al., 2015; Zerfass et al., 2010, 2014).

The ECM 2018 adds to this body of knowledge by exploring the current job satisfaction of communication professionals in Europe. General job satisfaction in the field is rather high with three quarters of respondents stating that they are happy at work. But it has slowly declined over the last eight years from an average of 5.33 on a seven-point scale in 2010, then 5.27 in 2014, and down to 5.15 in the 2018 edition of the monitor. When comparing key countries today, job satisfaction ranges from 4.74 in Italy to 5.55 in The Netherlands. The largest group of unhappy professionals can be found in Poland (26.2 per cent), followed by Italy, Ireland, Austria, Serbia, and the United Kingdom. Every fifth practitioner is dissatisfied in each of those countries. The Netherlands (8.3 per cent) and Finland (9.3 per cent) have the lowest share of dissatisfied communicators.

An instrument used in previous monitor surveys was used to assess the dimensions and drivers of job satisfaction in detail. Most positively evaluated are the interesting and manifold tasks associated with working in communications (agreed upon by 70.9 per cent of the respondents), followed by feeling valued by superiors and clients, the security and stability of the job, and its high status. Less than half of the communication professionals in Europe agree that their salary is adequate (48.0 per cent), that they have a good work-life balance (47.3 per cent) and that they have great career opportunities (38.1 per cent).

Compared to four and eight years ago the satisfaction with the social-economic dimensions of working in communications has grown: security and stability, the adequate salary and work-life balance. Women value all dimensions of job satisfaction generally lower than men and so do practitioners working in online, media relations and marketing communication, compared to those responsible for strategy and consulting. Also professionals working further up in the hierarchy have a higher job satisfaction than those working in lower ranks.

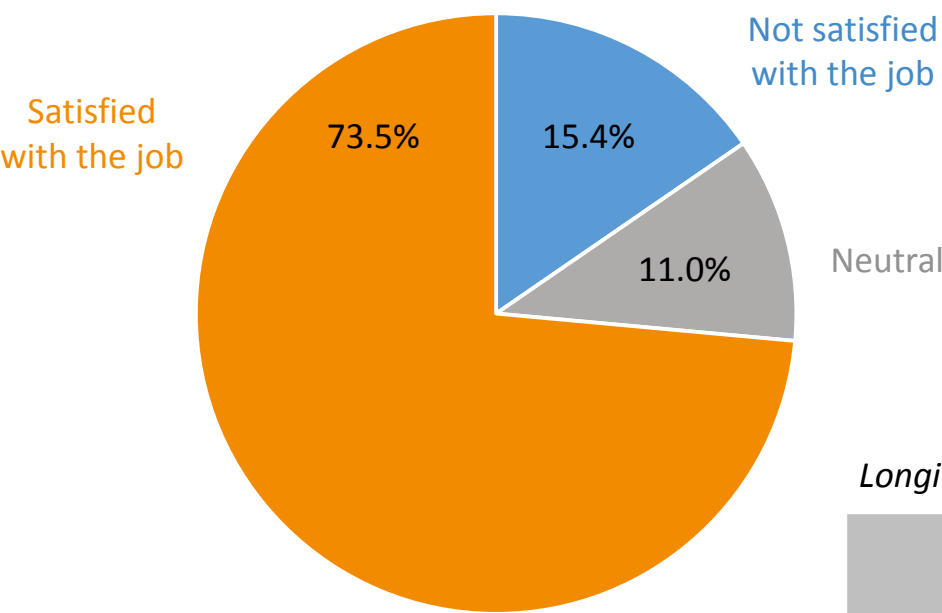
Notwithstanding the rising scores on more social-economic dimensions of job satisfaction, a more severe statistical analysis (regression modelling) shows that the main predictors for job satisfaction are interesting and manifold tasks, which is the most important driver, great career opportunities and appreciation from superiors and (internal) clients.

When asked about their plans for the further development of their career almost every third communication professional wants to leave his or her current employer and 5.2 per cent want to move out of communications. There is a strong correlation between job satisfaction and the willingness to leave. Professionals that want to move out of communications and change employers are the least satisfied with their job. They score 3.66 on a seven-point scale, while those who want to stay in their current position score 5.8 points.

Overall the results show that there is room for improvement on all dimensions of job satisfaction for those working in the field of strategic communication.

Overall job satisfaction: Three quarters of the communication professionals in Europe are happy at work; however satisfaction is slowly declining over time

Job satisfaction in 2018

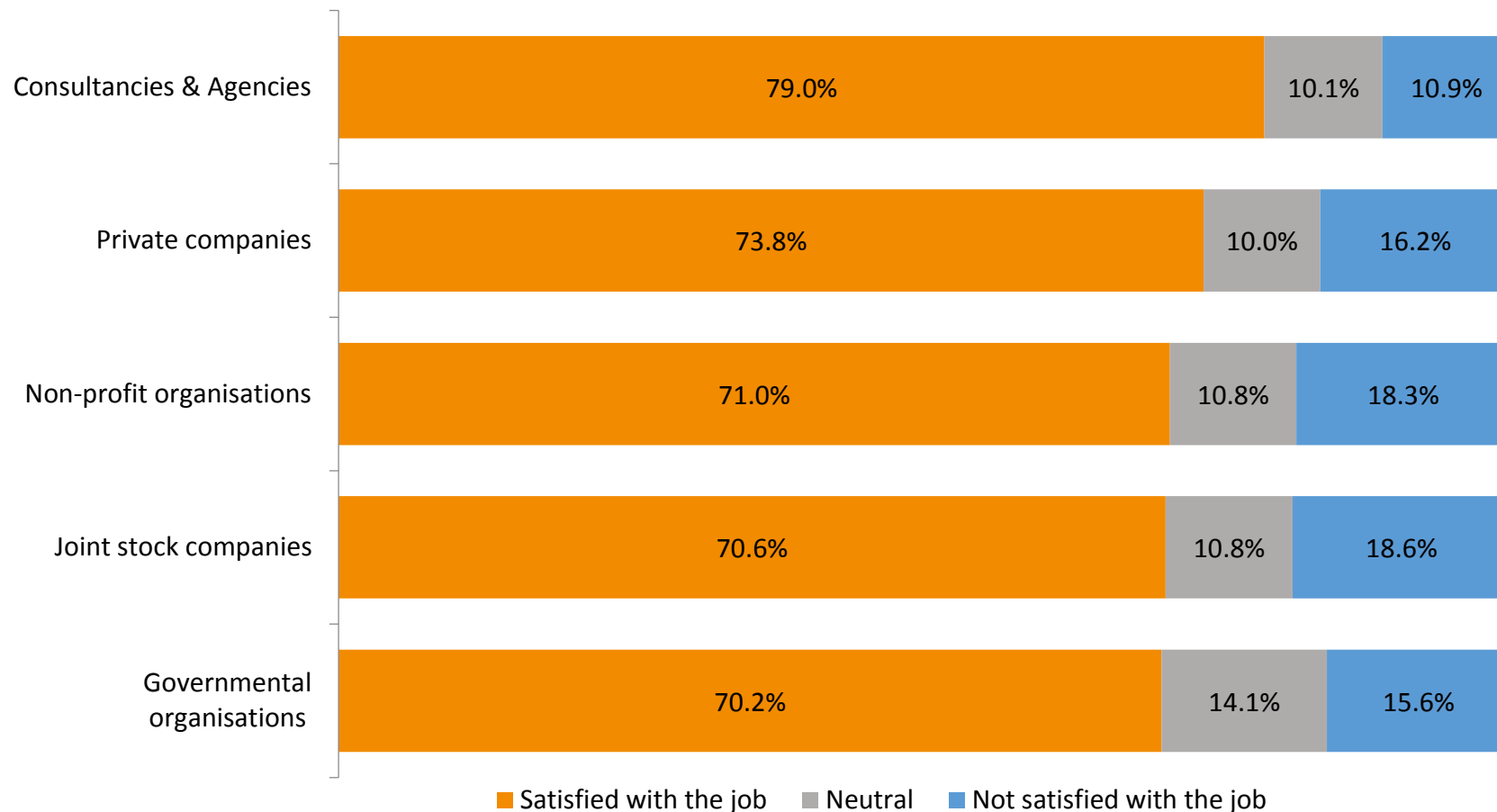


Longitudinal comparison

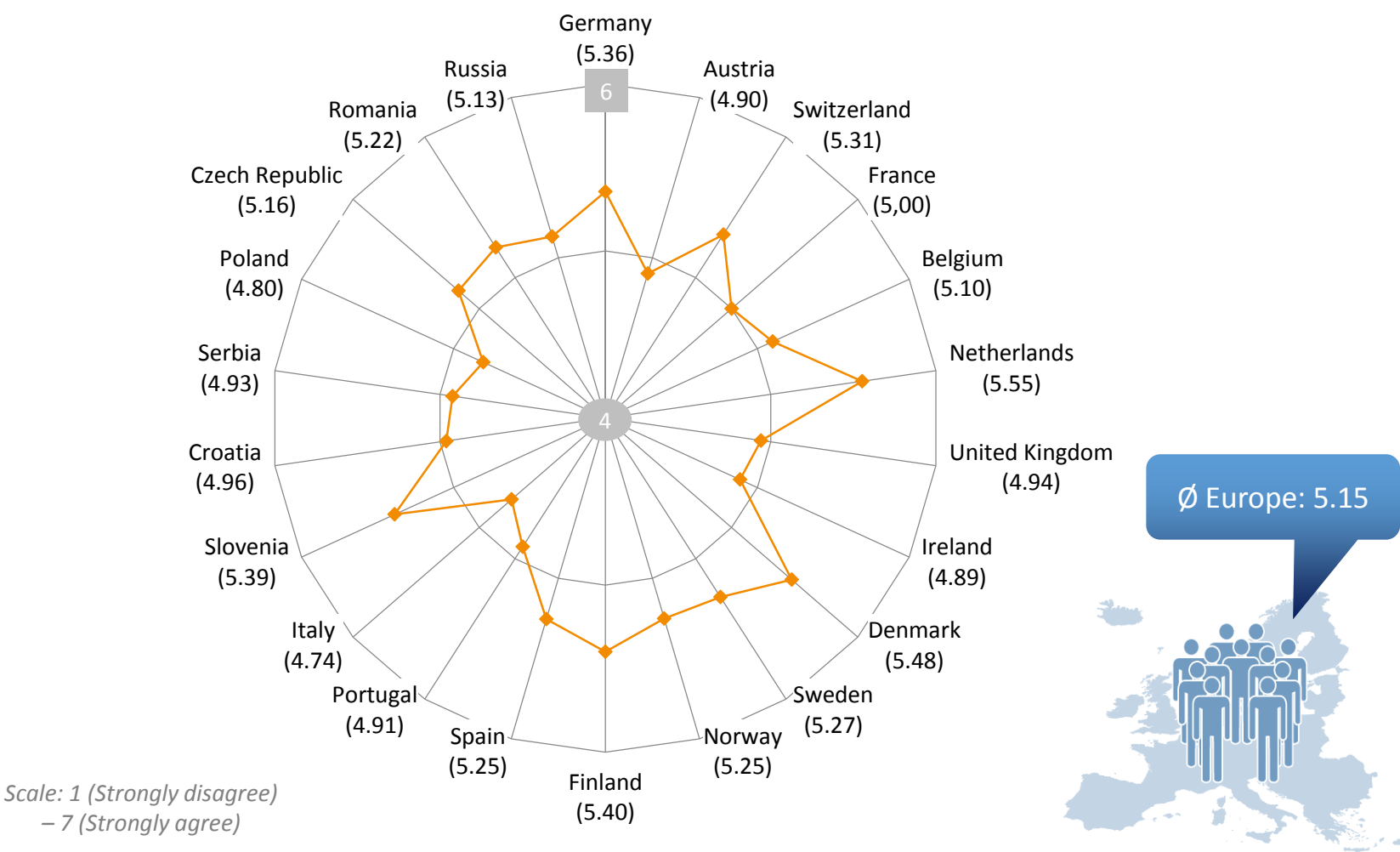
	2010	2014	2018
Job satisfaction	5.33	5.27	5.15
Scale: 1 (Strongly disagree) – 7 (Strongly agree). Mean values.			

www.communicationmonitor.eu / Zerfass et al. 2018 / n = 3,096 communication professionals, Q 16: To what extent do you agree with this statement: Overall, I am satisfied with my job. Scale 1 (Strongly disagree) – 7 (Strongly agree), Scale points: 1-3 = not satisfied, 4 = neutral, 5-7 = satisfied; Zerfass et al. 2014 / n = 2,777 (Q 3, Scale 1 = Strongly disagree – 5 = Totally agree); Zerfass et al. 2010 / n = 1,955 (Q 16, Scale 1 = Strongly disagree – 5 = Totally agree). Mean values for 2010 and 2014 have been recalculated for 7-point-scale.

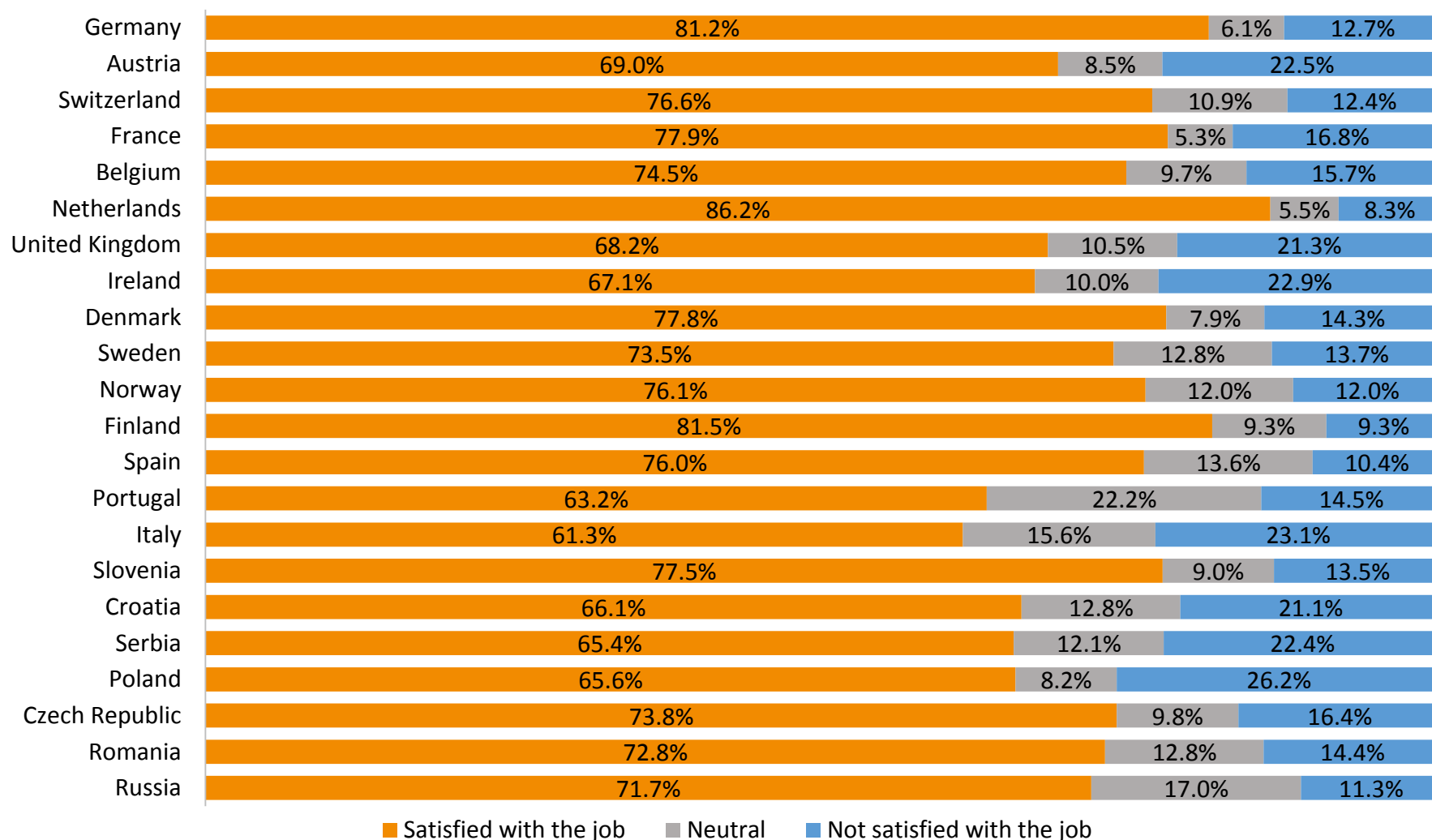
Practitioners working in consultancies are to a greater extent satisfied, while most unhappy colleagues can be found in non-profits and listed companies



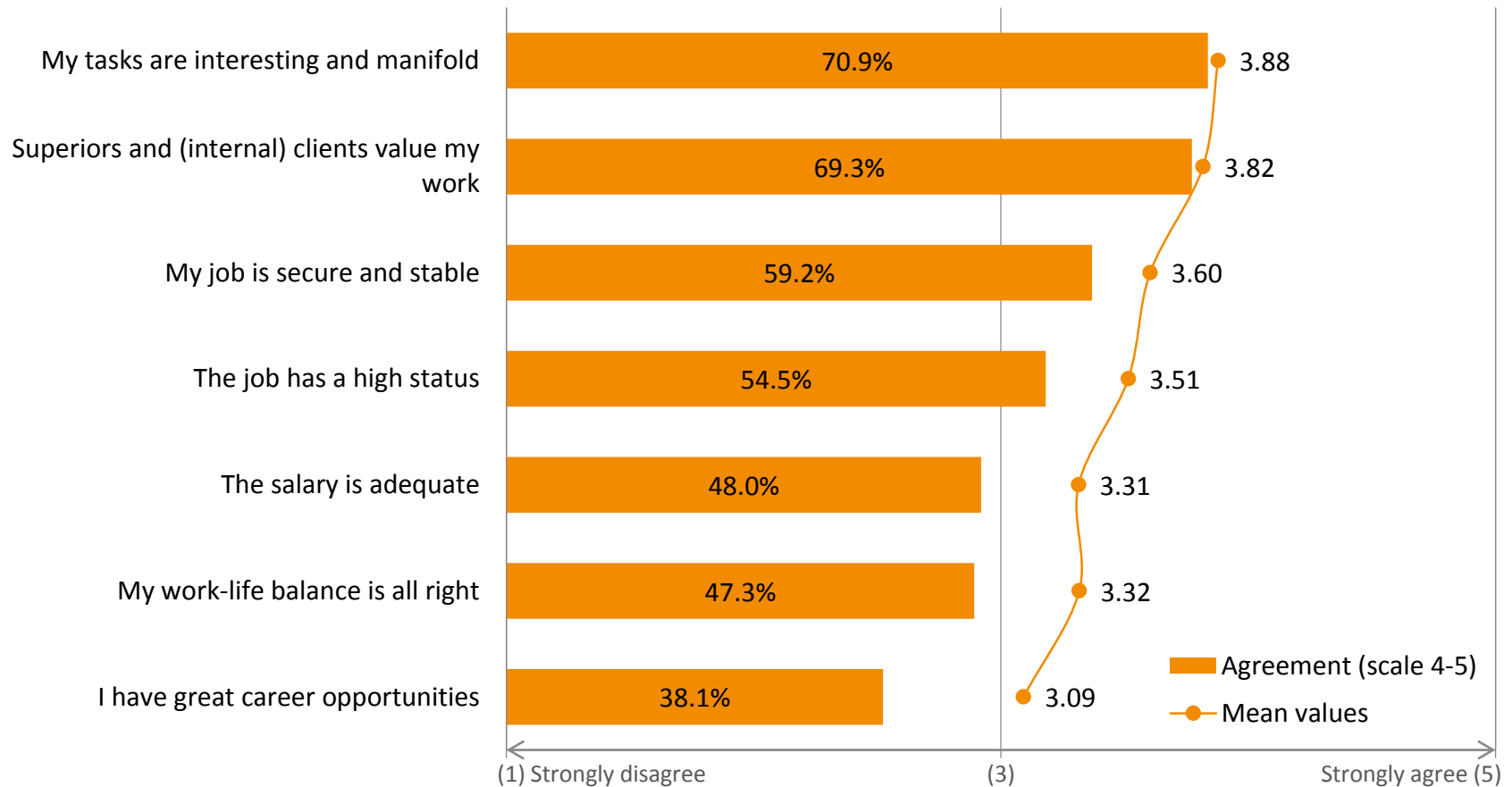
Job satisfaction of communication professionals across Europe



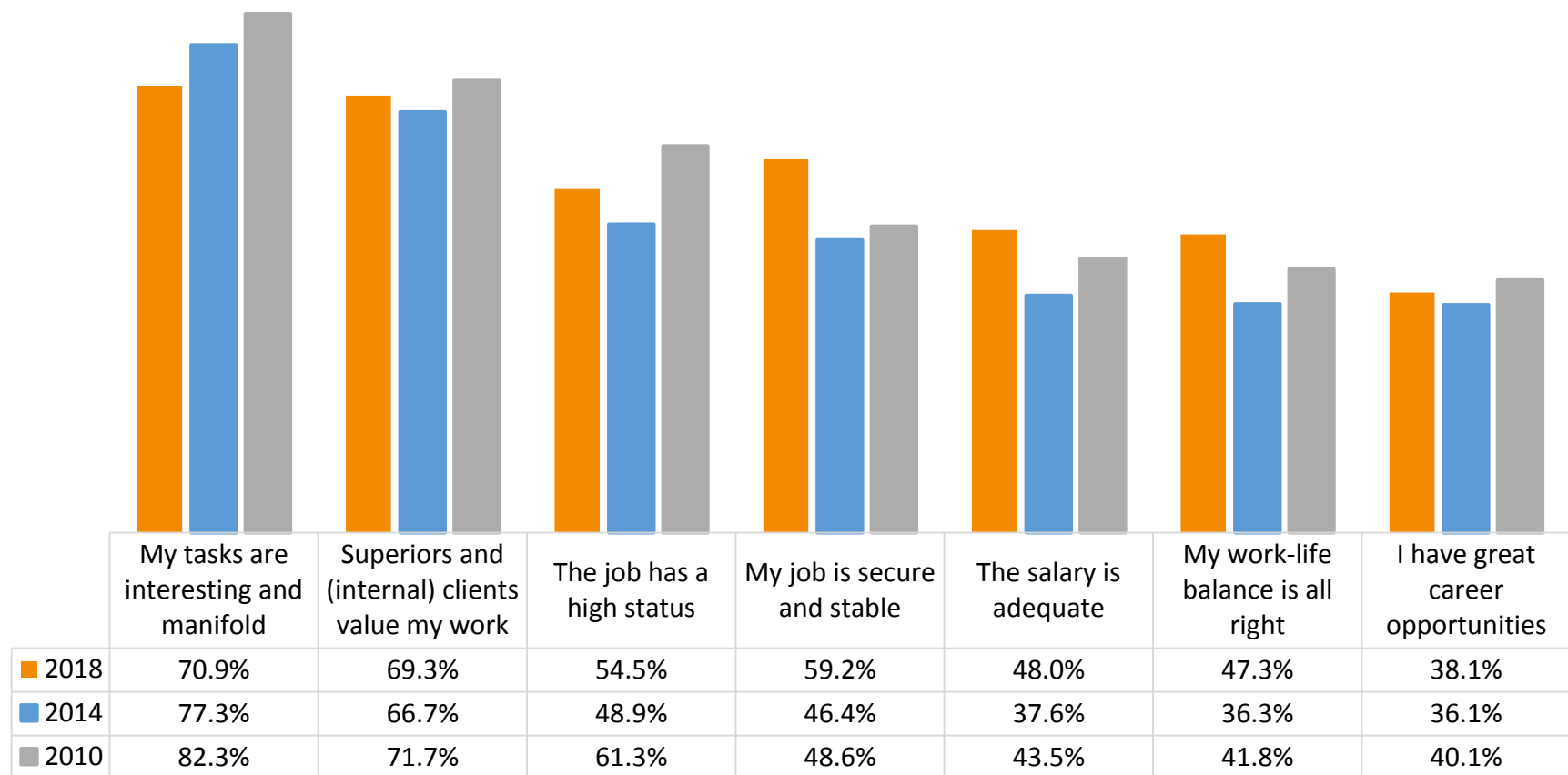
Overall job satisfaction of communication professionals in key countries



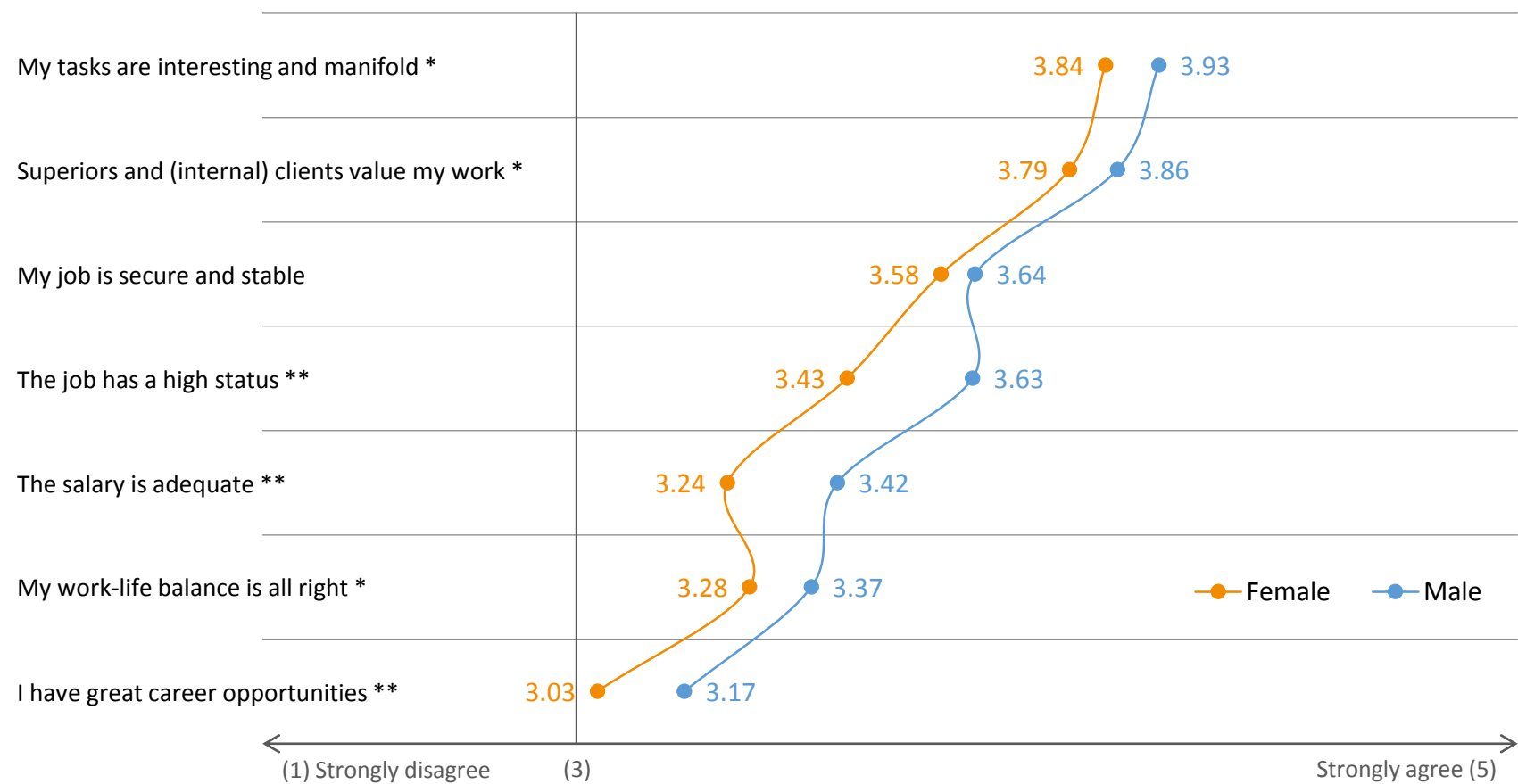
Dimensions of job satisfaction: Communication professionals enjoy an interesting job – but career opportunities and work-life-balance are often criticised



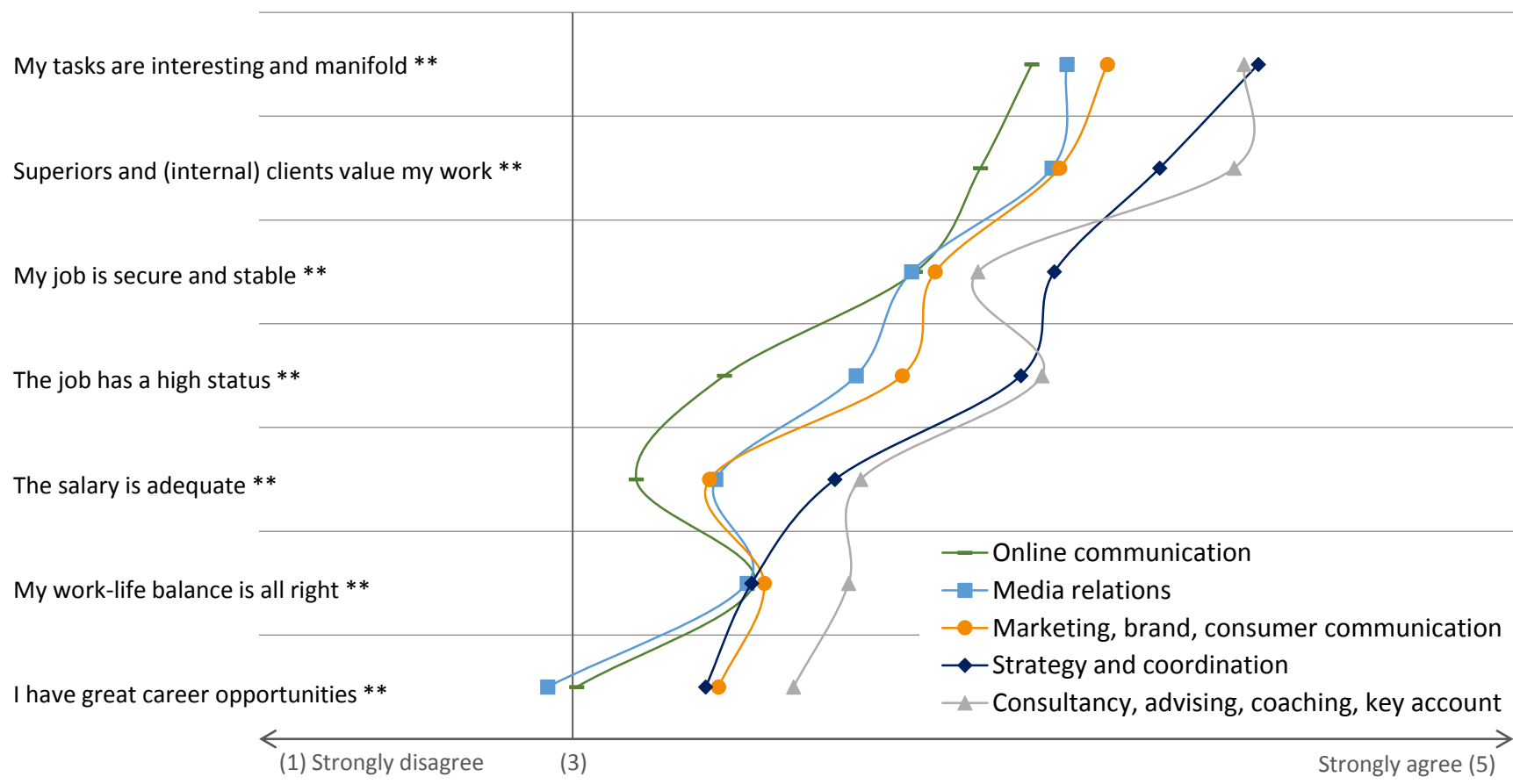
Longitudinal analysis of job satisfaction shows mixed development from 2010 to 2018



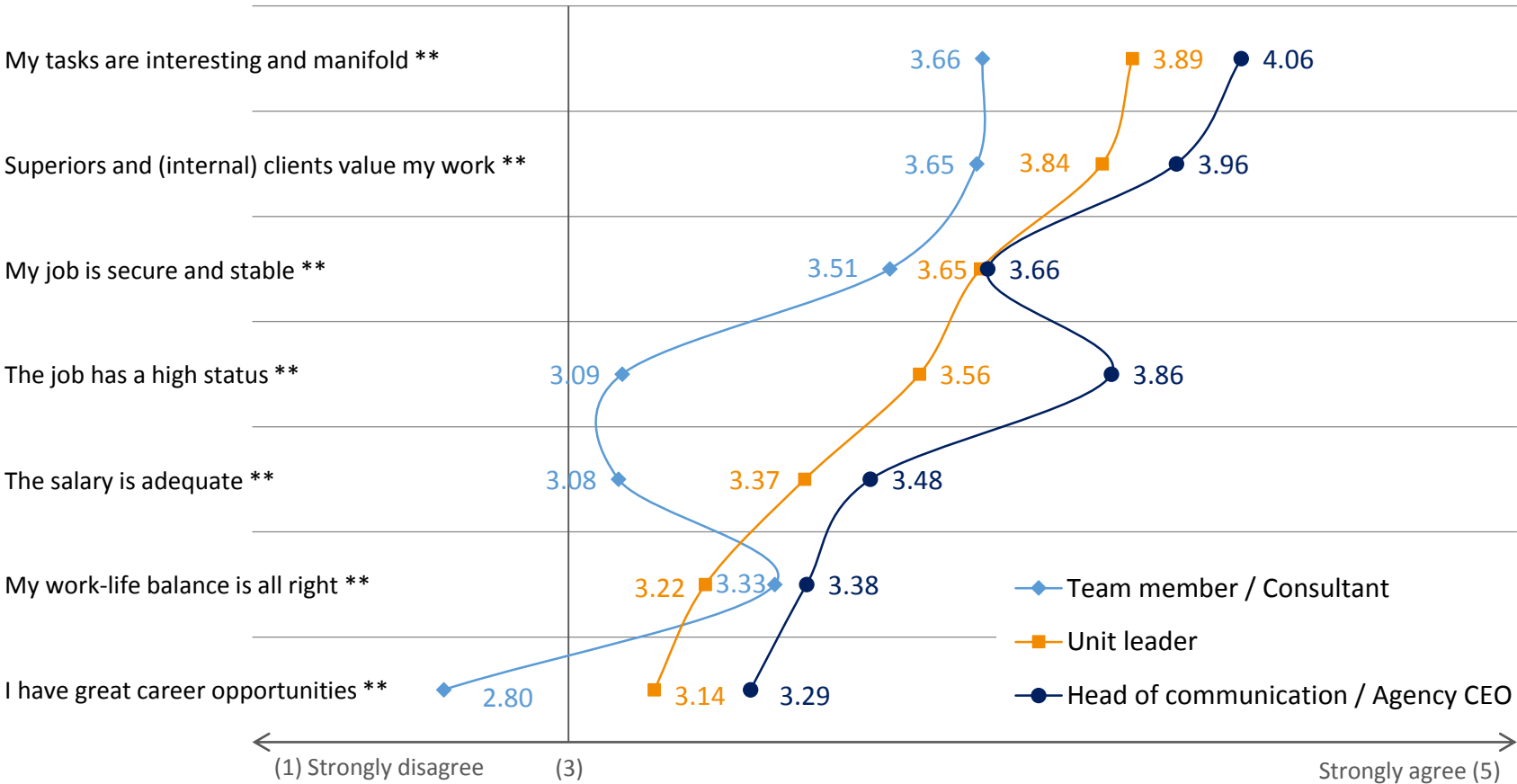
Gender and job satisfaction: female communication practitioners evaluate all dimensions lower than their male counterparts



Professionals working in online, media relations and marketing communication are less satisfied than colleagues specialized in strategy and consulting



Job satisfaction is generally higher the more senior professionals are

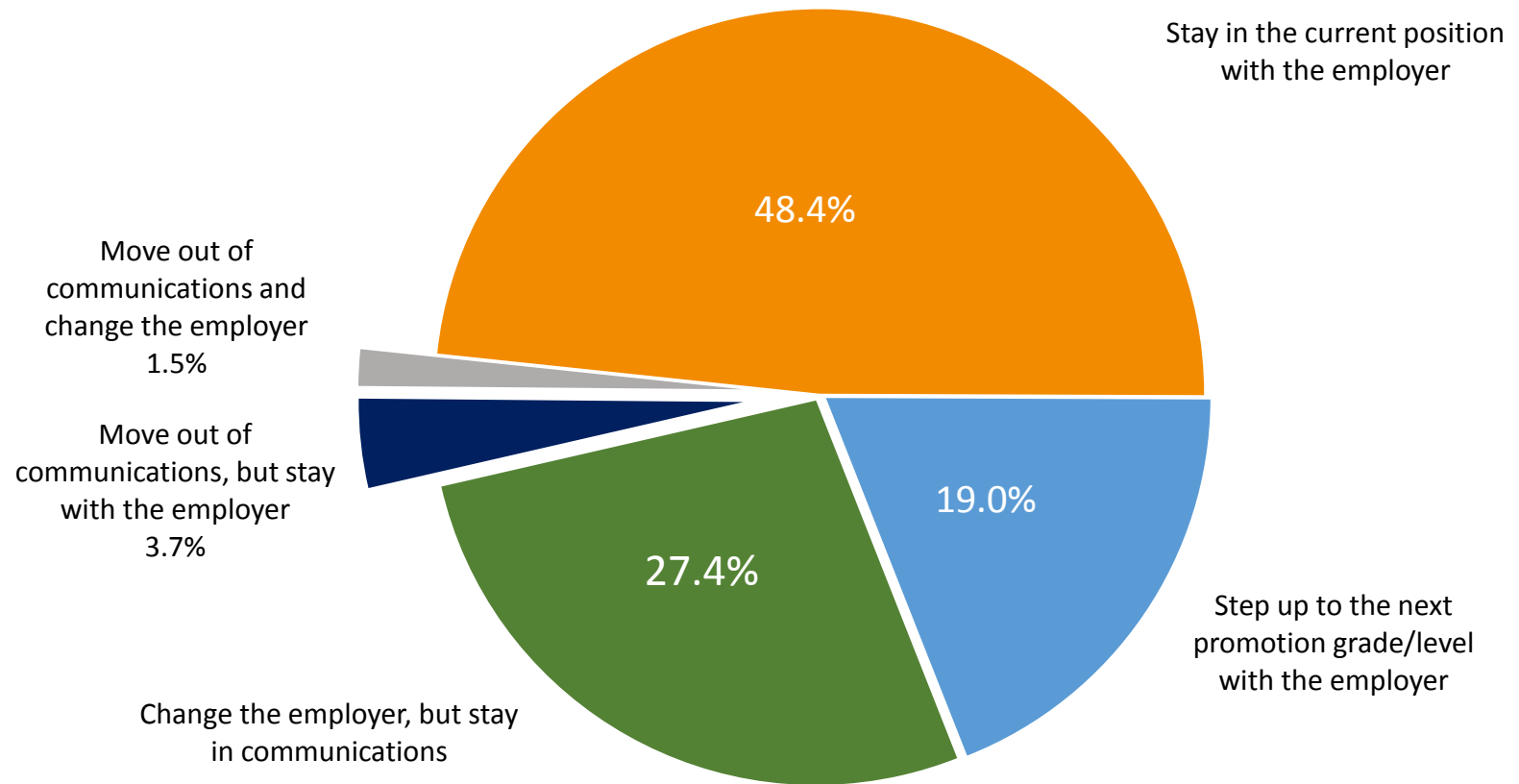


Strong and weak drivers of job satisfaction for communication professionals



Willingness to change: Almost every third communication practitioner wants to leave their current employer

Career development plans within the next 12 months



Strong correlation between job satisfaction and willingness to change



**Work environment and
leadership index for
communications**



Chapter overview

The following chapter uses the leadership report card developed by Bruce Berger, Juan Meng and Bill Heyman for The Plank Center for Leadership in Public Relations at the University of Alabama (see page 52 above). The method assesses the performance of communication leaders and their units on five dimensions: organisational culture, leader performance, trust in the organisation, overall job satisfaction and work engagement (Berger et al., 2015, 2017). The Plank Center research shows that engaged communication practitioners in the United States view their organisation's culture as more supportive, rate leader performance higher, place greater trust in their organisation and express greater job satisfaction. This is called the power of engagement. Berger et al. (2017) also found that engagement is strongly influenced by leadership and moderately influenced by culture – which means that empathetic communication leaders and a collaborative team culture can support the overall performance of communications in organisations.

The question is whether the same effects can be shown in Europe. Therefore, the report card methodology was used to model the data from the European Communication Monitor 2018. The scores on the questions about the five dimensions of the model show the European scorecard for communication leaders (p. 102). In Europe these scores on a seven-point scale are 4.86 on organisational culture, 5.08 on leader performance, 4.83 on trust in organisations, 5.15 on overall job satisfaction and 5.03 on work engagement.

It was checked whether the power of engagement works in Europe as well. It does, as is shown in the graph on page 104. This figure shows that work engagement can be influenced by leaders and that it is a key driver that links strongly to all other aspects. Actively disengaged and not engaged communication professionals have a lower score on the four other dimensions of the leadership report card than engaged professionals. For example, the overall mean of leader performance is 5.08, but engaged professionals assess it at 5.59, not engaged professionals at 4.11 and actively disengaged professionals only at 2.58.

Subsequently a structural equation model was tested to find out how the five dimensions of the scorecard are correlated. Structural equation modelling is a statistical technique where a specified model is tested as a whole, so there is no step by step testing of individual statements or hypotheses (Kline, 2005). In this case the model of the report card for communication leaders was tested as a whole. Any structural equation model shows very strong, strong, moderate or no effects (or correlations) between the different dimensions. In the case of European communication professionals, the model on page 105 shows that a supportive organisational culture and the performance of the communication leader predict the level of overall job satisfaction. This process is mediated by work engagement and trust in the organisation. In other words, overall job satisfaction of communication professionals will rise when work engagement and trust in the organisation are added to the model that explains job satisfaction only with organisational culture and performance of the leader. Job satisfaction is therewith shown to be a complex phenomenon that can be explained by the multiple dimensions used in the report card. The authors wish to thank Juan Meng from the University of Georgia, a member of the North American Communication Monitor research team, for performing the structural equation modelling and for inspiring this part of the research.

What can we learn from the leadership index for the practice of strategic communication? Quite simply: Leadership makes a difference – so educating, mentoring and promoting leadership skills in communications should be a priority for all organisations.

Report card for communication leaders shows status of communication departments/agencies in five dimensions and identifies areas for improvement



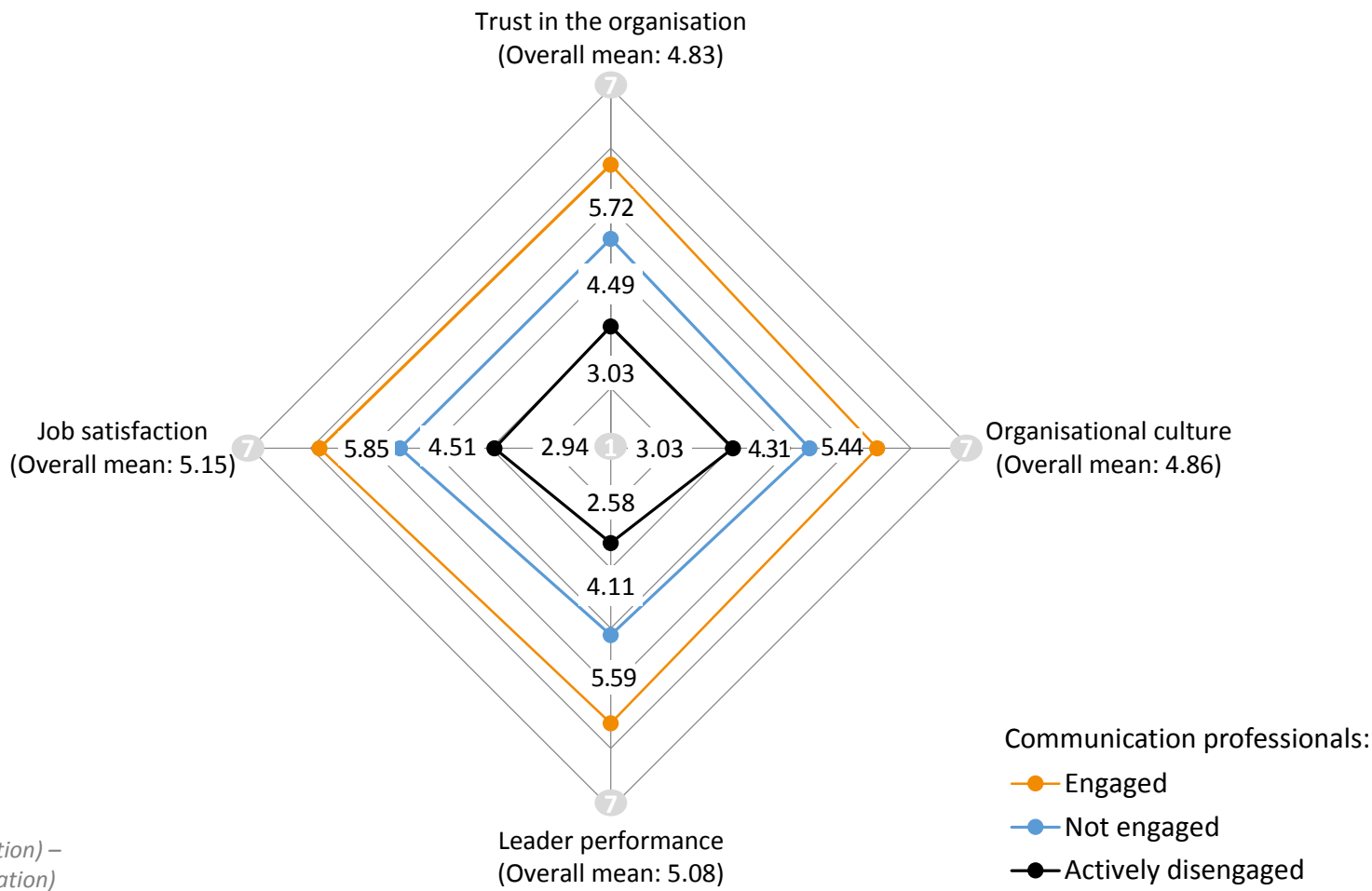
Report card for communication leaders in Europe 2018



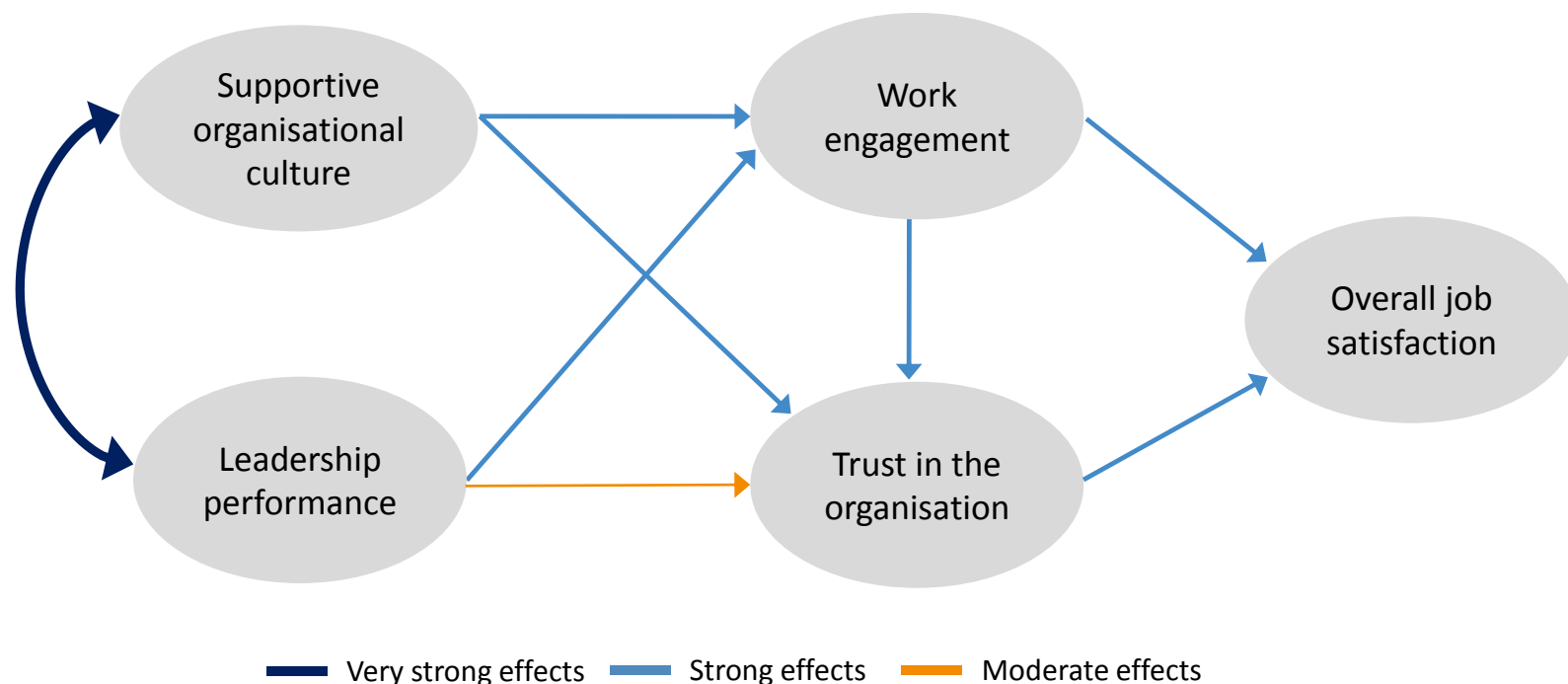
	Top leaders	Others
Satisfied with the job	81.2%	69.3%
Mixed satisfaction	7.2%	13.1%
Dissatisfied with the job	11.6%	17.6%

	Top leaders	Others
Engaged	62.2%	53.1%
Not engaged	31.7%	39.9%
Actively disengaged	6.1%	7.0%

The power of engagement: work engagement can be influenced by leaders and it is a key driver that links strongly to all other aspects



Organisational culture and leadership performance predict job satisfaction – mediated by work engagement and trust



Salaries



Chapter overview

Every year the European Communication Monitor reports data on salaries for communication professionals in Europe. For 2018 this will also be valuable data for comparison and discussion with insights from the surveys being conducted as part of the Global Communication Monitor series covering five continents and more than 80 countries.

The data reported in this year's ECM covers important demographic variables of age, gender, organisational position and type of organisation as well as the most easily compared figures on salary rates of pay across the sample which, for this year, totalled 3,096 communication professionals from 48 countries across Europe. It has to be noted that differences to previous surveys might be related to variations in the composition of respondents in the samples and to general income differences across Europe.

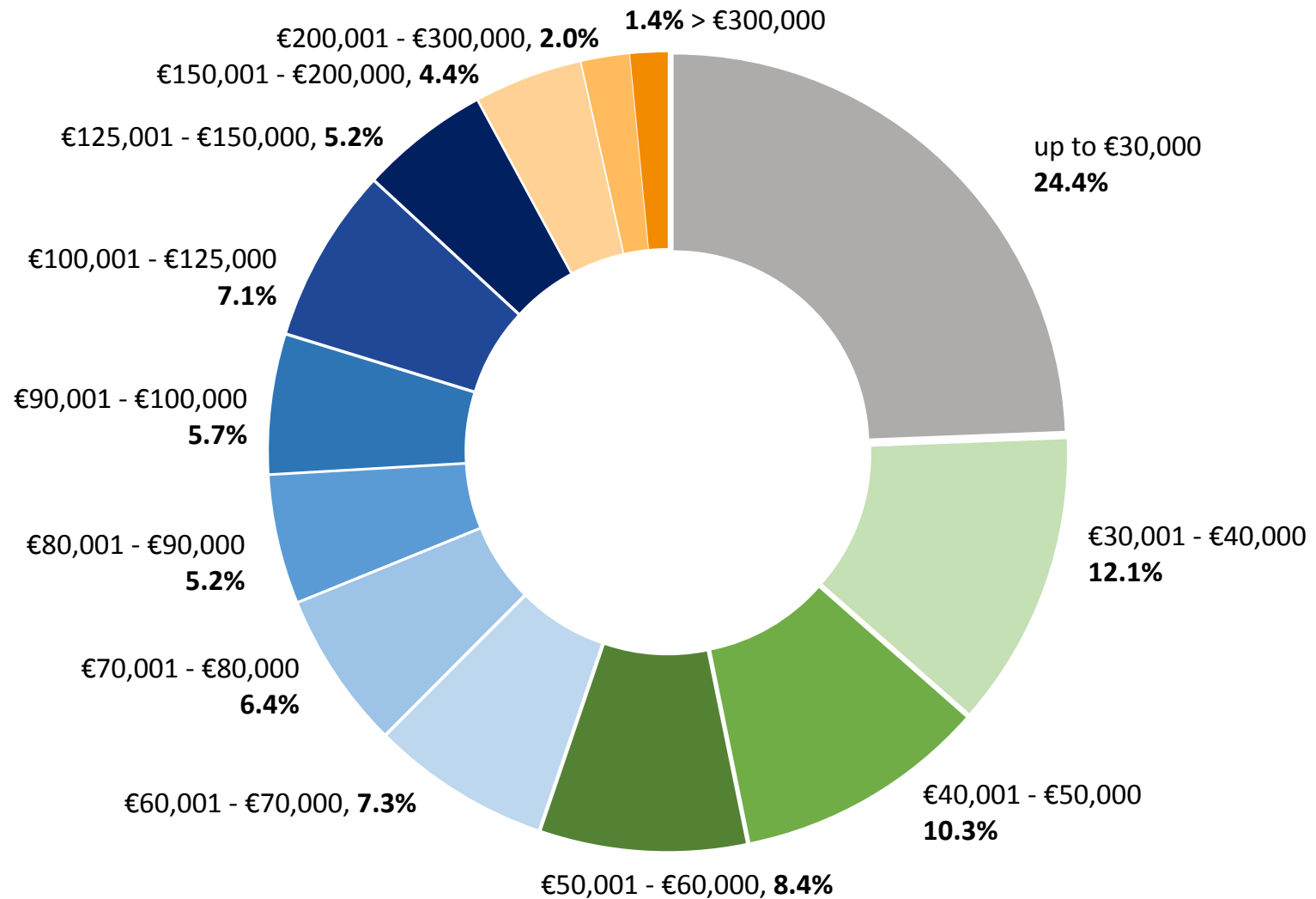
In 2018 a quarter of respondents earn up to €30,000 annually (24.4 per cent) with most countries representing this group located in Southern and Eastern Europe (Portugal, Slovenia, Croatia, Serbia, Poland, Czech Republic, Romania). In line with previous years' reports, the majority of the overall sample earn less than €60,000 (55.2 per cent). At the top end of the pay scales across 48 countries the numbers are small and with sharp regional differences. For example, Switzerland, Denmark, France, The Netherlands and Germany top the high earning regions (over €150,000).

An analysis of longitudinal data since 2009 shows surprising consistency over the past 10 years for the top line managers in organisations (heads of communication and agency CEOs). For example, ten years ago 4.7 per cent of unit leaders, team members and consultants earned more than €150,000 and in 2018 this accounted for 3.7 per cent. Salaries for different types of organisation show that consultancies have the most employees in both the bottom pay category (up to €30,000) and also the top (over €150,000).

Every year the ECM reports important data on gender pay. This is a societal debate in the entertainment industries and across the business and employment sector. Many countries in Europe now require large employers to publish their gender pay gaps (what they pay male and female employees for the same job or role). Each year we report these findings we discuss familiar pay differences that are reflected in other sectors of society. This is despite communications being a female dominated industry which has generated gender discussions and debate in the literature (Place & Vardeman-Winter, 2017; Tench & Topić, 2017; Toth & Aldoory, 2017) as well as in national professional associations across Europe. Little appears to have changed in 2018 and this once again raises many interesting questions for leaders and representative bodies in the profession from across Europe. Put simply, once again in 2018 men earn more than women. The findings are quite stark. At the top end, significantly more men (21.2 per cent) earn more than €150,000 whereas only 8.7 per cent of women receive this high level of remuneration. At the bottom end of the pay range the findings are reversed with more women (17.8 per cent) earning up to €30,000 against 8.1 per cent of men in the same category.

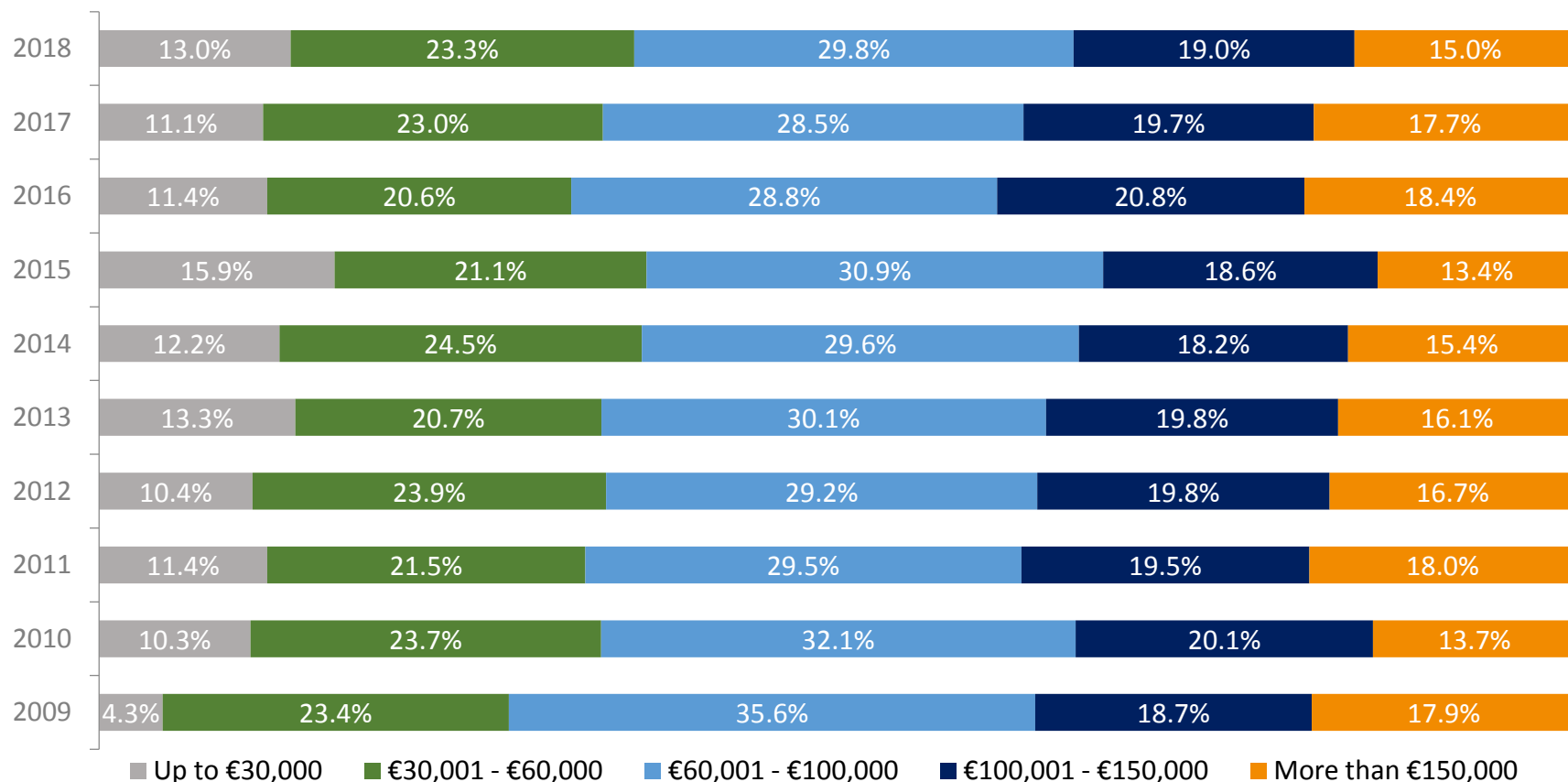
On a more positive note with the salary debate there is once again good news from this year's survey about membership of the European Association of Communication Directors (EACD) and its correlation with levels of pay. There are significantly more EACD members in the ranks of the better paid practitioners and less members among the least paid practitioners. EACD members outperform non-members in almost every €10,000 category above €70,000 all the way up to €300,000.

Basic annual salary of communication practitioners in Europe 2018



Development of salaries of top-level communicators

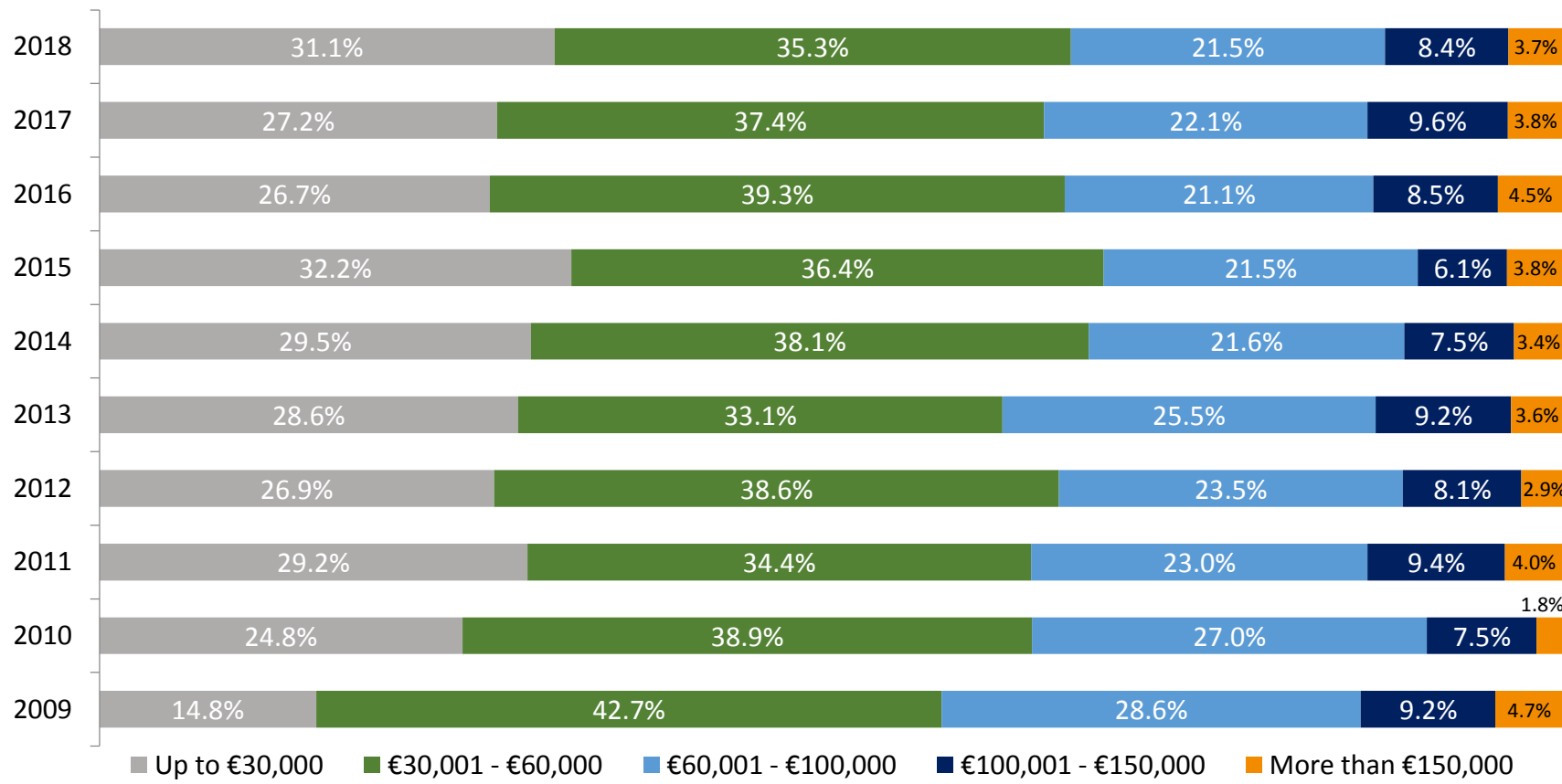
Basic annual salaries (heads of communication and agency CEOs)



www.communicationmonitor.eu / Zerfass et al. 2018 / n = 941 heads of communication and agency CEOs (Q 37); Zerfass et al. 2017 / n = 1,099 (Q 31); 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: 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.

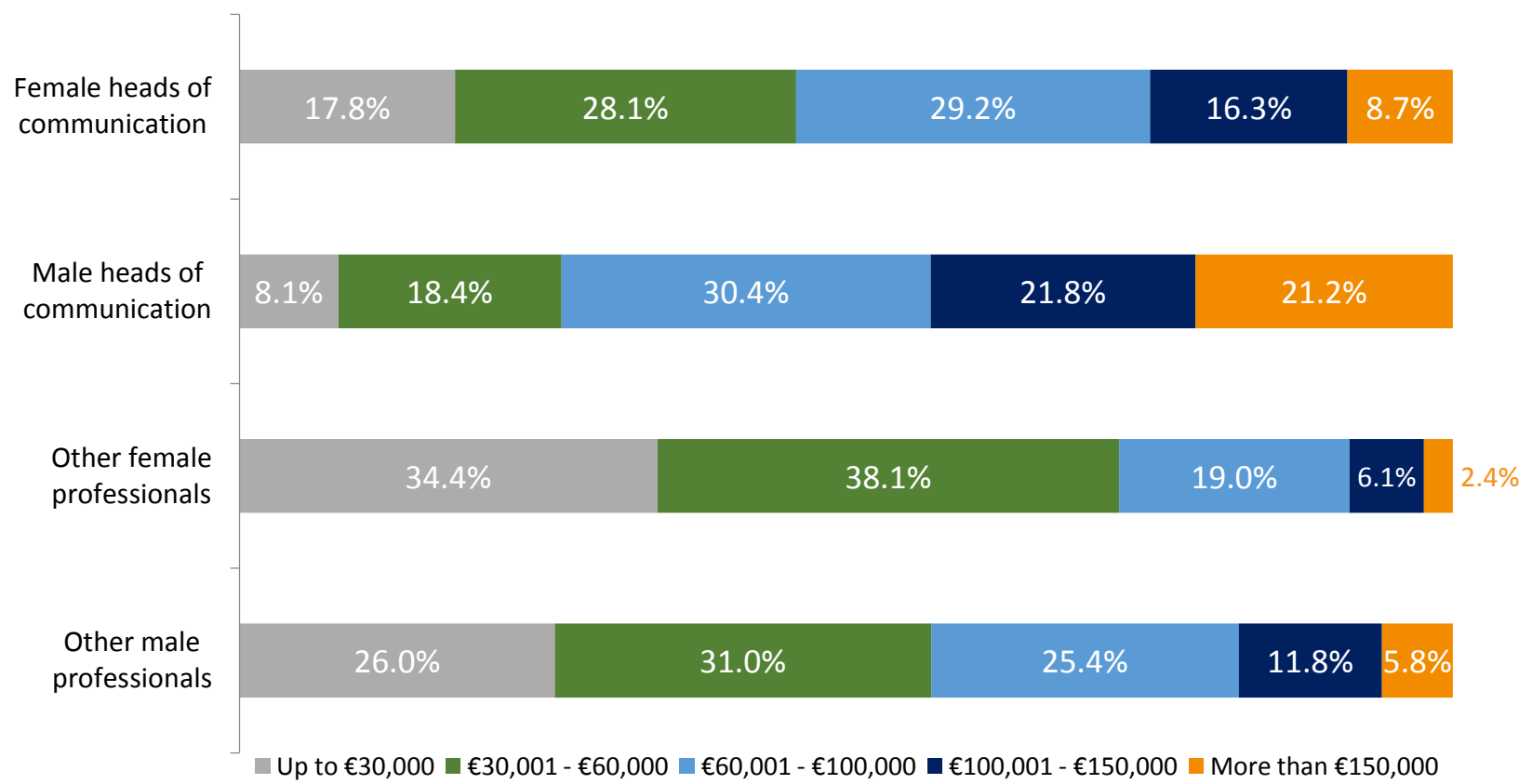
Salary development on other hierarchical levels

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



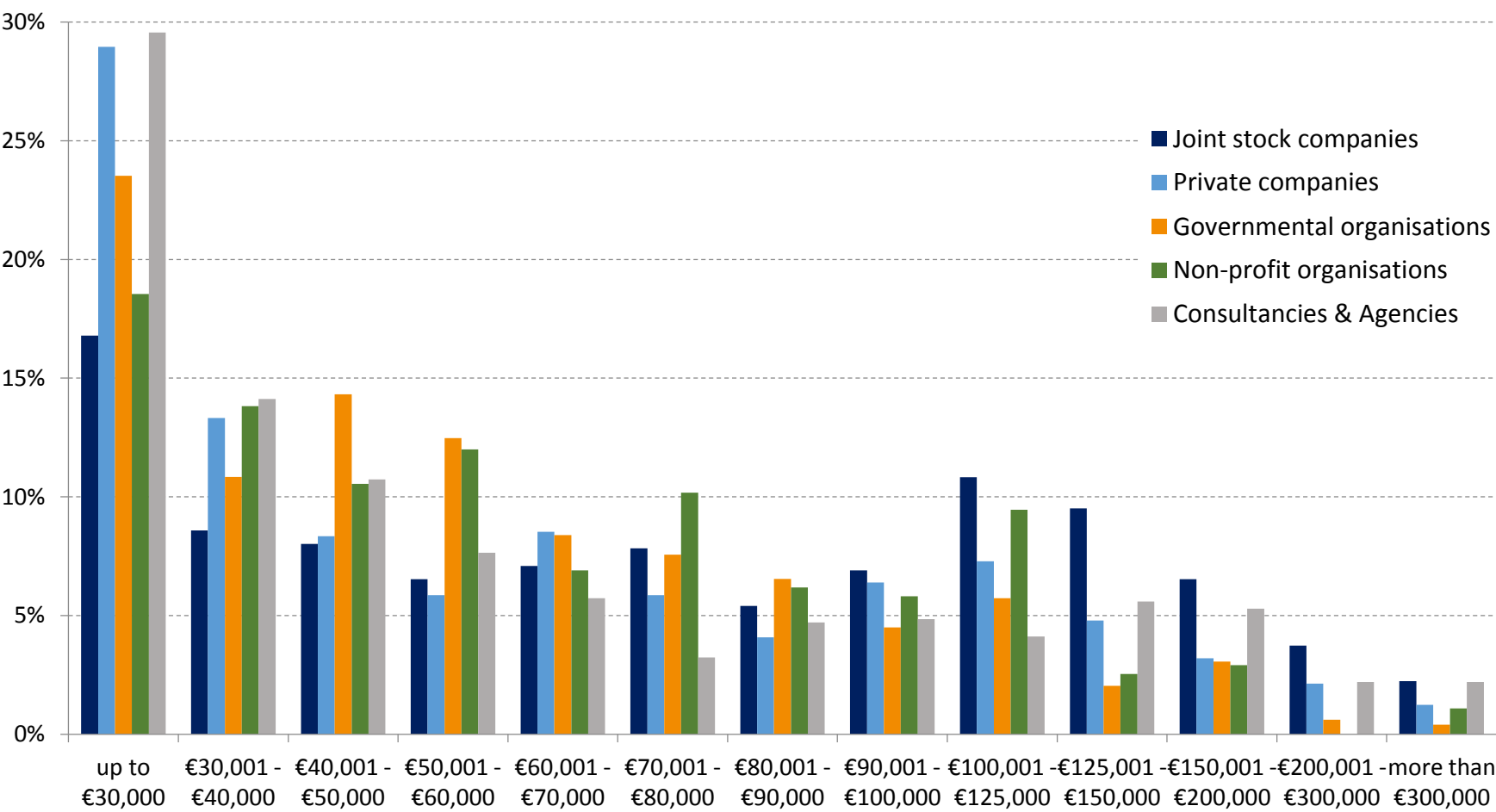
www.communicationmonitor.eu / Zerfass et al. 2018 / n = 1,602 communication professionals below the top level of the hierarchy (Q 37); Zerfass et al. 2017 / n = 1,793 (Q 31); 2016 / n = 1,433 (Q 32); Zerfass et al. 2015 / n = 1,067 (Q 33); Zerfass et al. 2014 / n = 1,428 (Q 41); Zerfass et al. 2013 / 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: 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.

A salary gap between men and women is significantly proven for the highest hierarchical level in communications

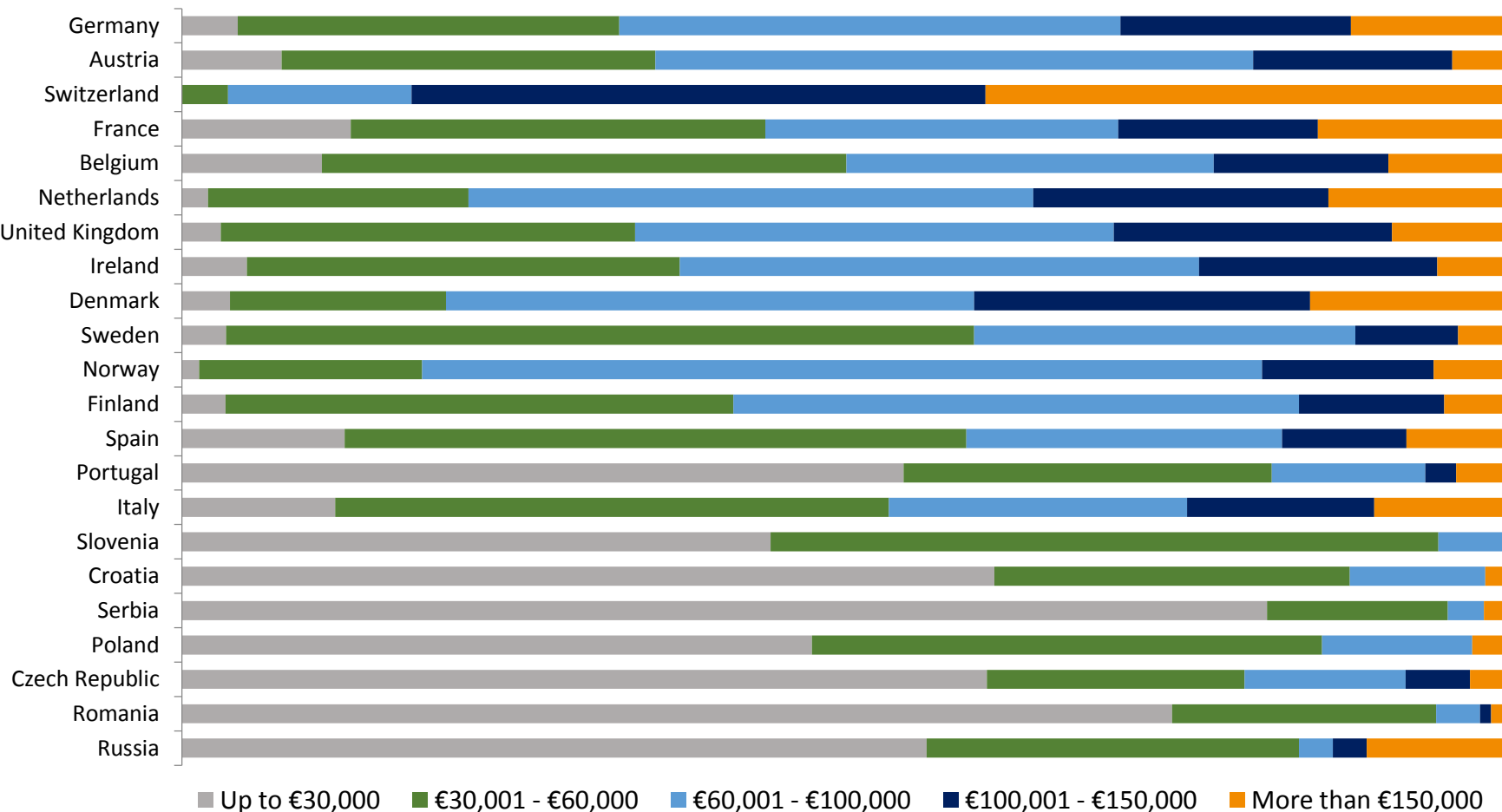


www.communicationmonitor.eu / Zerfass et al. 2018/ n = 2,539 communication professionals. Q 37: In which of the following bands does your basic annual salary fall? Highly significant differences for heads of communication and agency CEOs (chi-square test, $p \leq 0.01$, Cramér's $V = 0.249$). Results may be influenced by the distribution of types of organisations and countries among both genders.

Annual salaries in different types of organisation



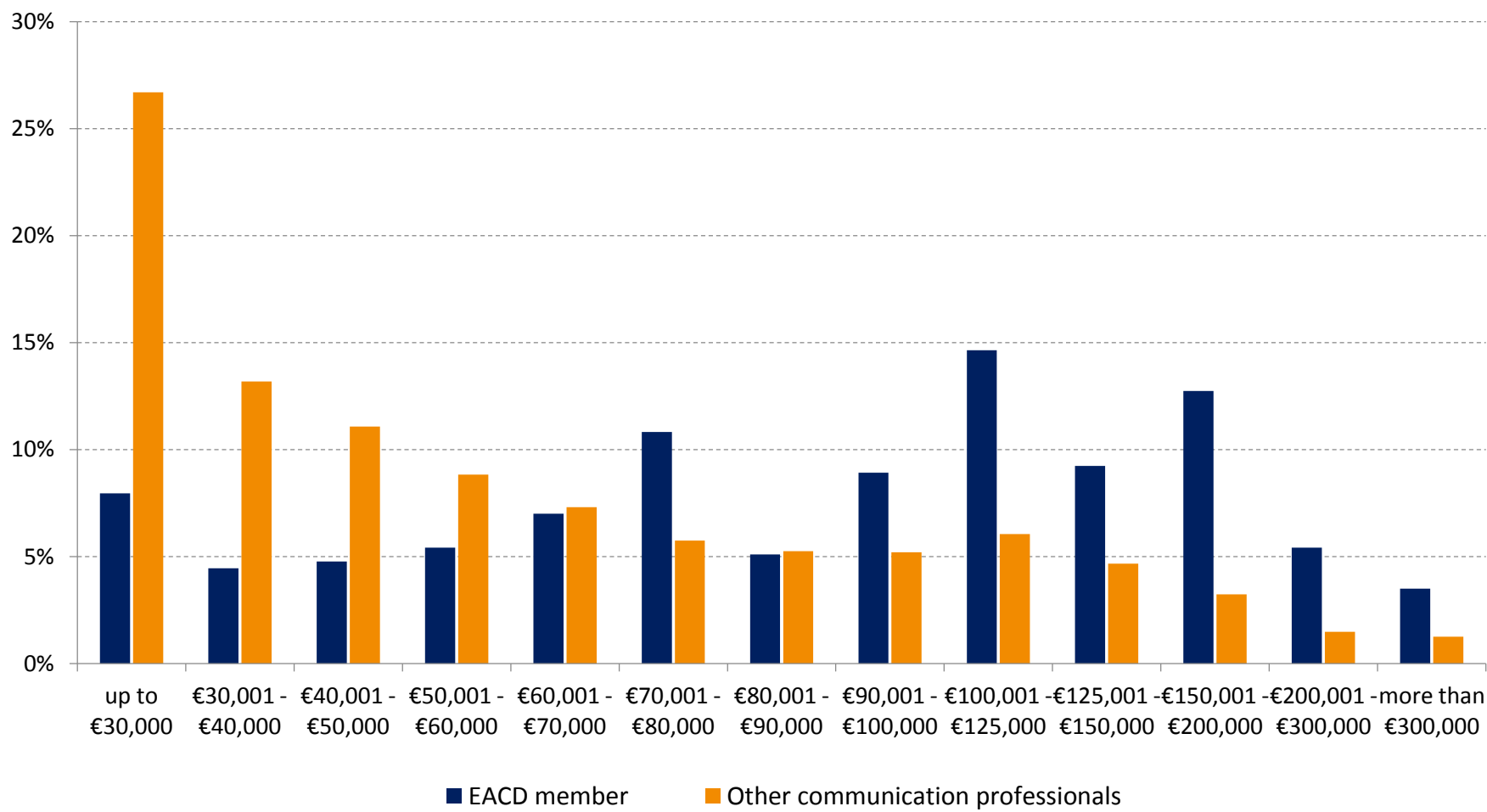
Annual salaries in different European countries



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	4.2%	28.9%	38.0%	17.5%	11.4%	Finland	3.3%	38.5%	42.9%	11.0%	4.4%
Austria	7.5%	28.3%	45.3%	15.1%	3.8%	Spain	12.3%	47.1%	23.9%	9.4%	7.2%
Switzerland	-	3.5%	13.9%	43.5%	39.1%	Portugal	54.7%	27.9%	11.6%	2.3%	3.5%
France	12.8%	31.4%	26.7%	15.1%	14.0%	Italy	11.6%	41.9%	22.6%	14.2%	9.7%
Belgium	10.6%	39.7%	27.8%	13.2%	8.6%	Slovenia	44.6%	50.6%	4.8%	-	-
Netherlands	2.0%	19.7%	42.8%	22.4%	13.2%	Croatia	61.5%	26.9%	10.3%	-	1.3%
United Kingdom	2.9%	31.4%	36.3%	21.1%	8.3%	Serbia	82.2%	13.7%	2.7%	-	1.4%
Ireland	4.9%	32.8%	39.3%	18.0%	4.9%	Poland	47.7%	38.6%	11.4%	-	2.3%
Denmark	3.6%	16.4%	40.0%	25.5%	14.5%	Czech Republic	61.0%	19.5%	12.2%	4.9%	2.4%
Sweden	3.3%	56.7%	28.9%	7.8%	3.3%	Romania	75.0%	20.0%	3.3%	0.8%	0.8%
Norway	1.3%	16.9%	63.6%	13.0%	5.2%	Russia	56.4%	28.2%	2.6%	2.6%	10.3%

Members of the European Association of Communication Directors (EACD) enjoy a comparatively high annual salary



Characteristics of excellent communication departments



Chapter overview

Since 2014 this study has been exploring and expanding the understanding of the characteristics of excellent communication departments. This is based on our Comparative Excellence Framework for Communication Management based on self-assessment and inspired by business excellence models (Verčič & Zerfass, 2016). In the past years we have been building on and expanding this knowledge as annual data helps us understand more concretely what excellent looks like. Key results have been summarised in our book on communication excellence 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).

From this year’s responses we have 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. Excellence is based on the internal standing of the communication department within the organisation (influence) and external results of the communication department’s activities as well as its basic qualifications (performance). Each of these two components was calculated on the basis of four dimensions (see page 118 for details). Only organisations clearly outperforming in all dimensions are considered as excellent.

The analysis demonstrates that approximately one fifth of communication departments are excellent (17.7 per cent) while the majority (82.3 per cent) do not fall into this category. We find a strong alignment of communications to top management with related differences between excellent and other departments. Looking into topics reported in the 2018 survey it is notable that emerging issues such as fake news are managed differently by excellent and other departments. For example, more excellent departments (19.5 per cent) can be classified as advanced when it comes to identifying fake news than other departments (9.7 per cent).

When analysing how excellent departments operate inside the organisation, we see that they are more likely to deliver value internally by providing information to the organisation’s top management as well as being more likely to offer a broad range of management reports such as media monitoring, news briefings, survey results and reputation and brand reports more frequently. They are also better at providing daily executive news briefings and social media monitoring to decision-makers inside the organisation.

Other identifiable differences between excellent departments and others are that they are more likely to be able to evidence better leadership performance. Top managers and unit leaders understand the value of communications to a higher extent; and communication leaders have stronger leadership skills. Not surprisingly, communication practitioners working in excellent departments show higher levels of work engagement and they trust their organisation to a far higher extent. Importantly a lower proportion of professionals working in excellent departments (20.2 per cent) have serious stress problems against 30.5 per cent in other departments. And finally, on a positive note nearly all professionals in excellent department professionals (93.5 per cent) are satisfied with their job in contrast to their peers in other departments (66.8 per cent). This also means that a vast majority is loyal and wants to stay in their current position or with their current employer. Communication excellence thus proves to be beneficial both to those working in the field and to the organisations using the power of strategic communication to reach their goals.

Identifying excellent communication functions

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

(Q23)

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

EXECUTIVE INFLUENCE

(Q24)

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

SUCCESS

(Q25)

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

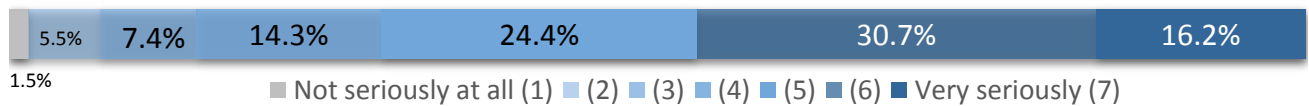
COMPETENCE

(Q26)

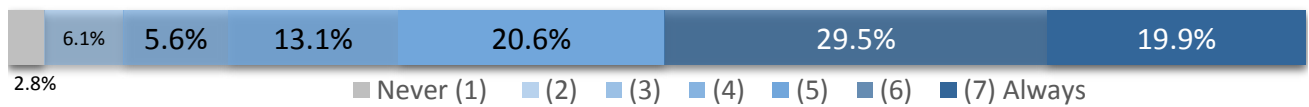
The quality and ability of the communication function is (much) better compared to those of competing organisations

Excellent communication departments

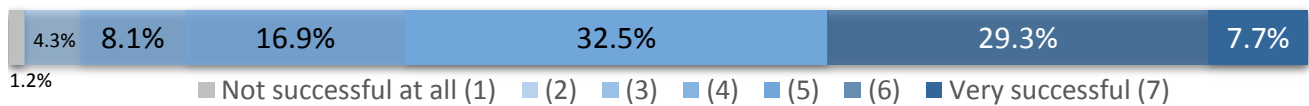
Advisory influence



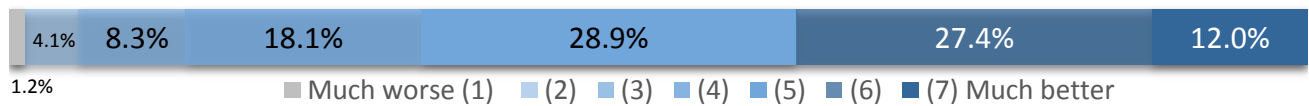
Executive influence



Success

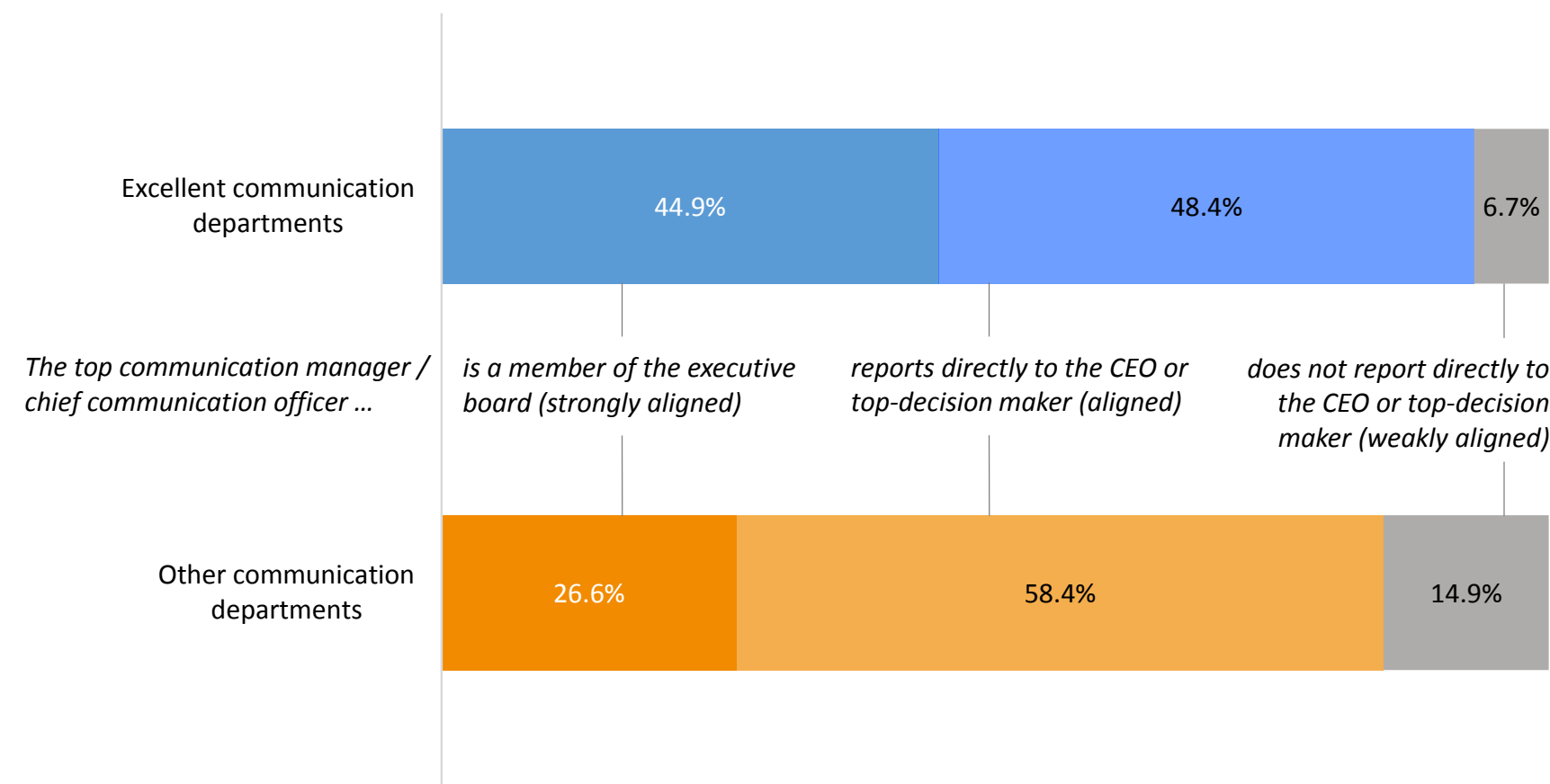


Competence



www.communicationmonitor.eu / Zerfass et al. 2018 / n = 2,271 communications professionals in communication departments. Advisory influence, Q 23: In your organisation, how seriously do senior managers take the recommendations of the communication function? Executive influence, Q 24: How likely is it, within our organisation, that communication would be invited to senior-level meetings dealing with organisational strategic planning? Q 25: In your opinion, how successful is the communication of your organisation in general? Q 26: How would you estimate the quality and ability of the communication function in your organisation compared to those of competitors? Scale 1 – 7 (wording see above). Percentages: Excellent communication departments based on scale points 6-7 for each question.

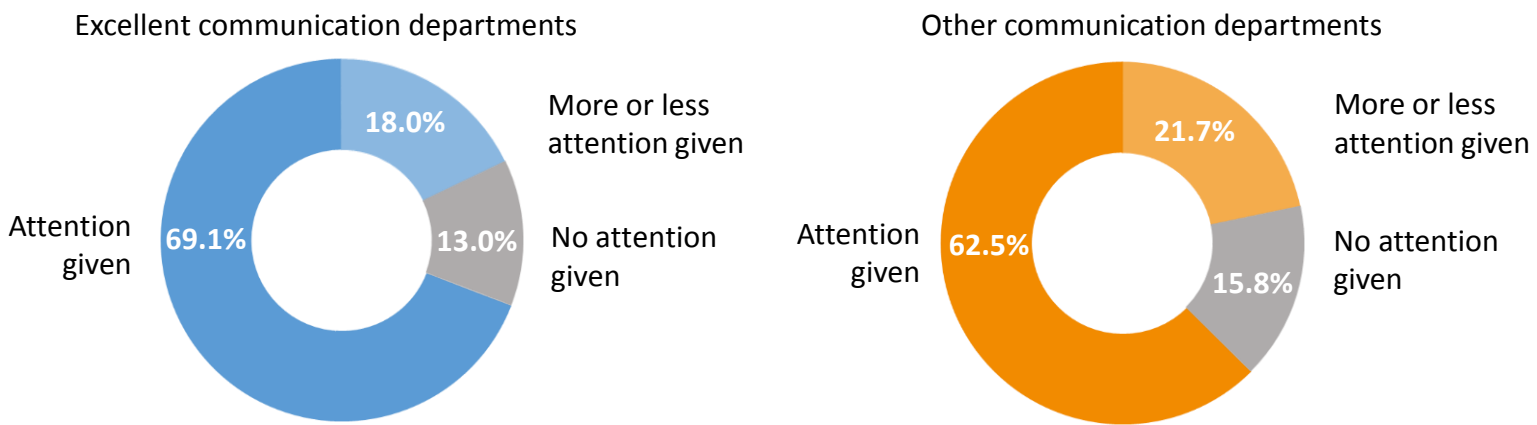
Alignment of communications to top management: Significant differences between excellent and other departments



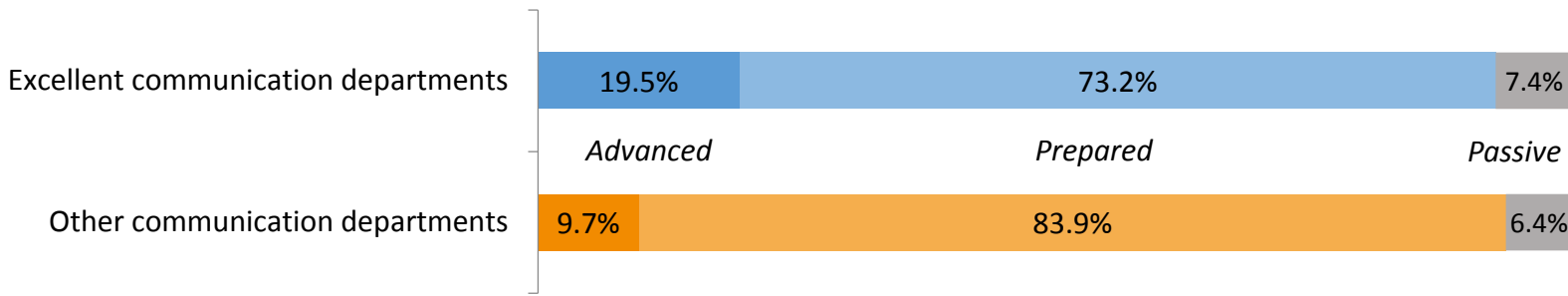
www.communicationmonitor.eu / Zerfass et al. 2018 / n = 2,271 communication professionals in communication departments across Europe. Q 22: Within your organisation, the top communication manager or chief communication officer ... is a member of the executive board / reports directly to the CEO or highest decision-maker on the executive board / does not report directly to the CEO or highest decision-maker. Highly significant differences (Kendall rank correlation, $p \leq 0.01$, $\tau = 0.154$).

Excellent departments are better prepared to deal with fake news

Attention given to the debate about fake news



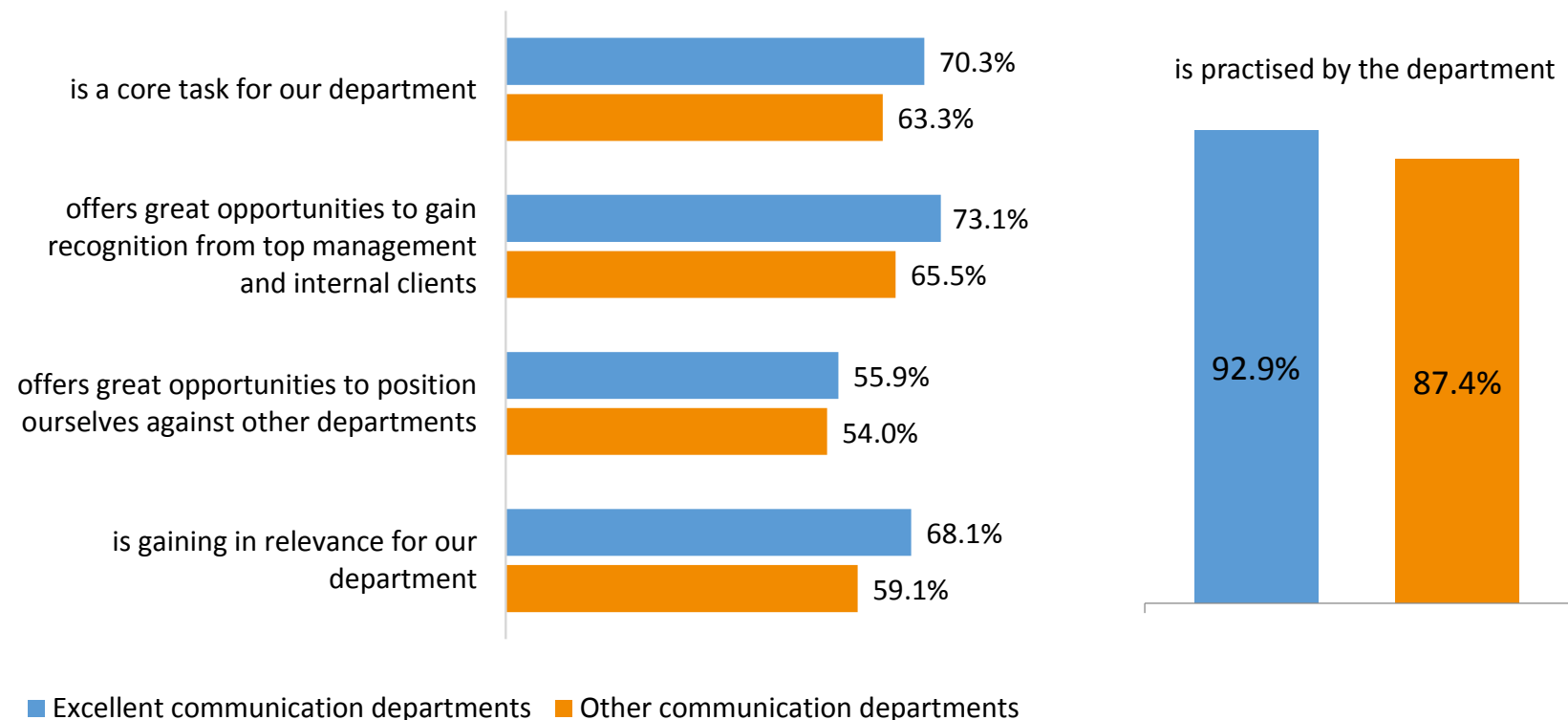
Organisational approach to identify fake news



www.communicationmonitor.eu / Zerfass et al. 2018 / n = 868 communication professionals in communication departments across Europe. Q 1: Please rate these statements based on your experience. Item: I have given attention to the debate about fake news. Scale 1 (Not at all) – 5 (To a great extent). Highly significant differences (chi-square test, $p \leq 0.01$, Cramér's $V = 0.077$). Q 5: How is your communication department/agency prepared to identify (potential) fake news? Multiple answers possible. Cluster solution based on Q 5 (hierarchical cluster analysis; Z-scores). Highly significant differences (chi-square test, $p \leq 0.01$, Cramér's $V = 0.118$).

Excellent communication departments are delivering value by providing information to top management

Providing information for decision-makers ...

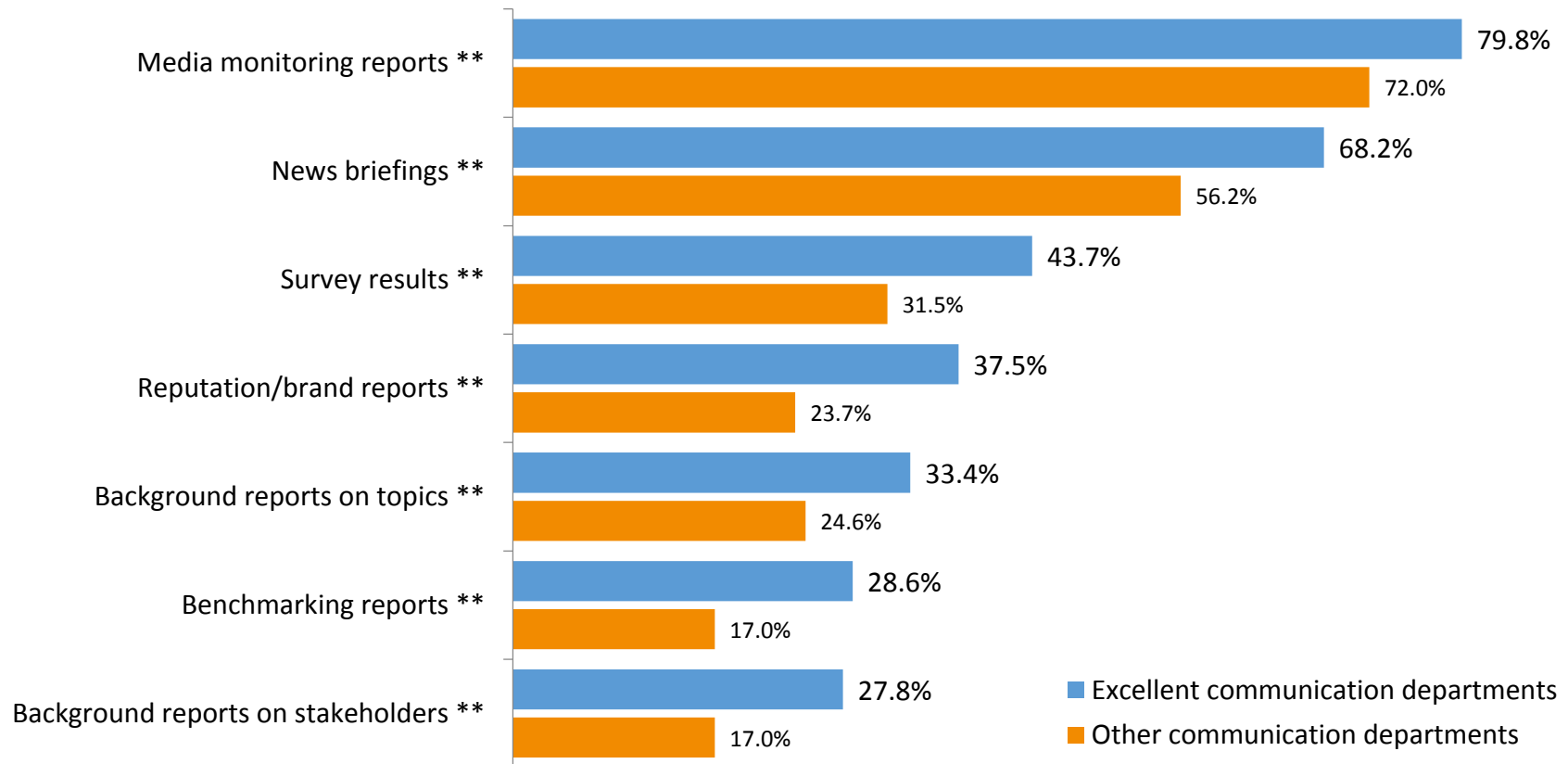


www.communicationmonitor.eu / Zerfass et al. 2018 / n = 2,271 communication professionals in communication departments across Europe. Q 7: Many communication departments provide insights to top management and (internal) clients by delivering information through daily news briefings, media monitoring, survey results, and other reports like scenarios or benchmarks. Please rate the following statements based on your experience. ** Highly significant differences (chi-square test, $p \leq 0.01$). Q 8 (n = 2,241): Does your department deliver information like news briefings, media monitoring, survey results, brand/reputation reports, benchmarking or background reports to top management and/or internal clients? Percentages based on "agreement".

** Highly significant differences (chi-square test, $p \leq 0.01$, Phi = 0.065).

Excellent communication departments offer all kinds of management reports more frequently

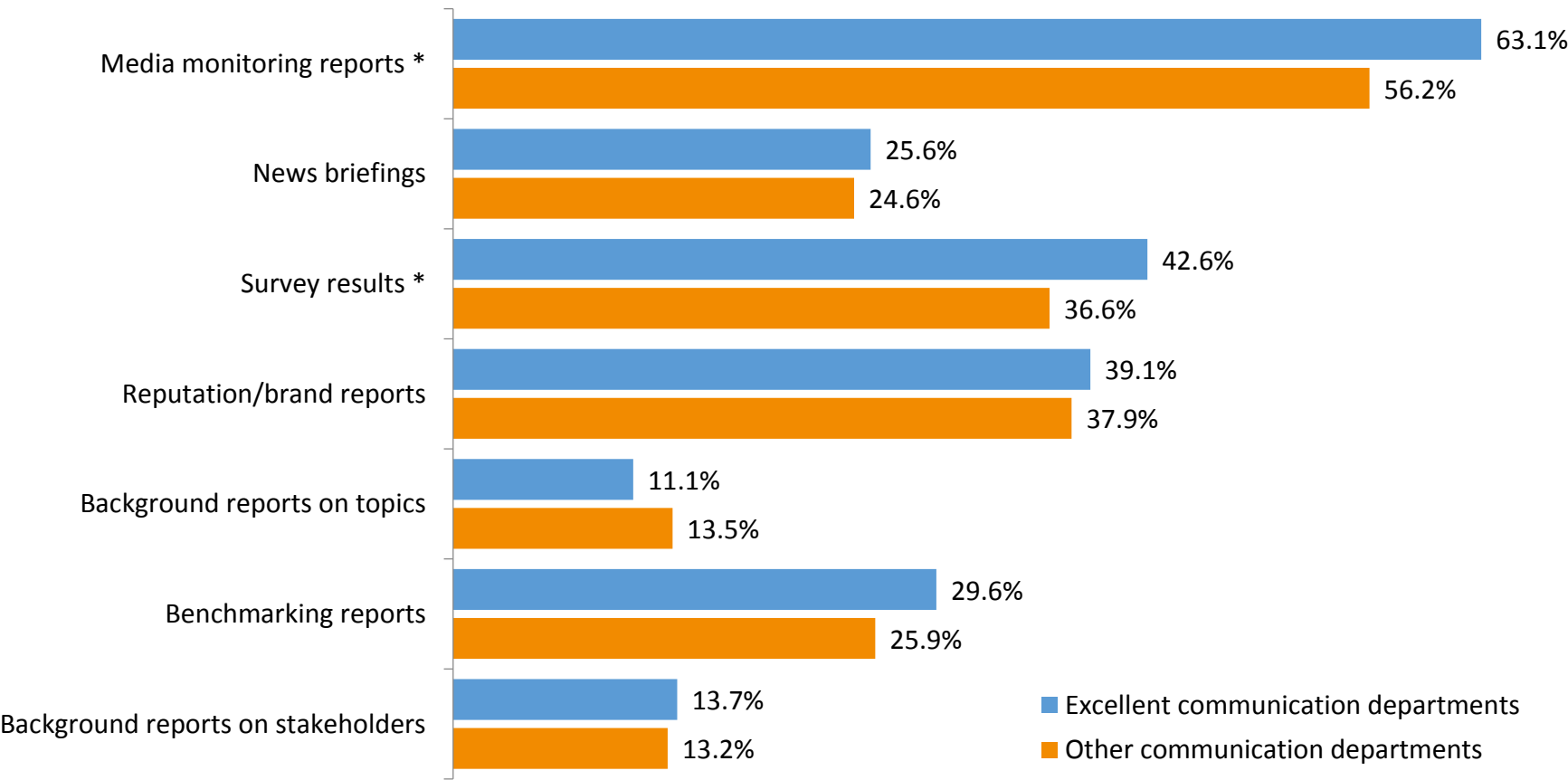
Information frequently provided to top management and/or internal clients



www.communicationmonitor.eu / Zerfass et al. 2018 / n = 1,997 communication professionals in communication departments across Europe. Q 9a: How frequently does your department provide the following information to top management and/or (internal) clients? Percentages based on "regularly".

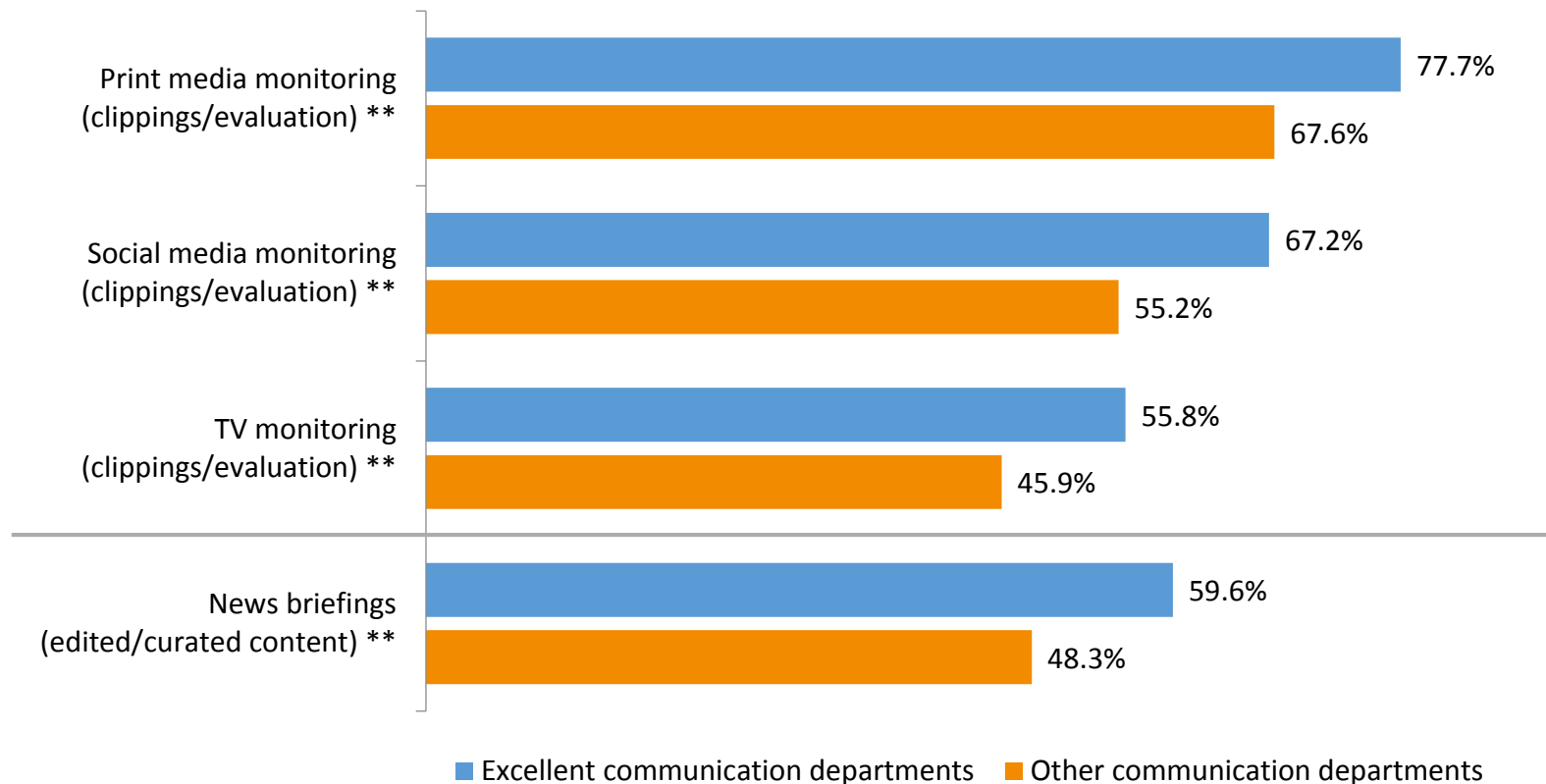
** Highly significant differences (Kendall rank correlation, $p \leq 0.01$).

Excellent communication departments prepare (and use) in-house reports more extensively

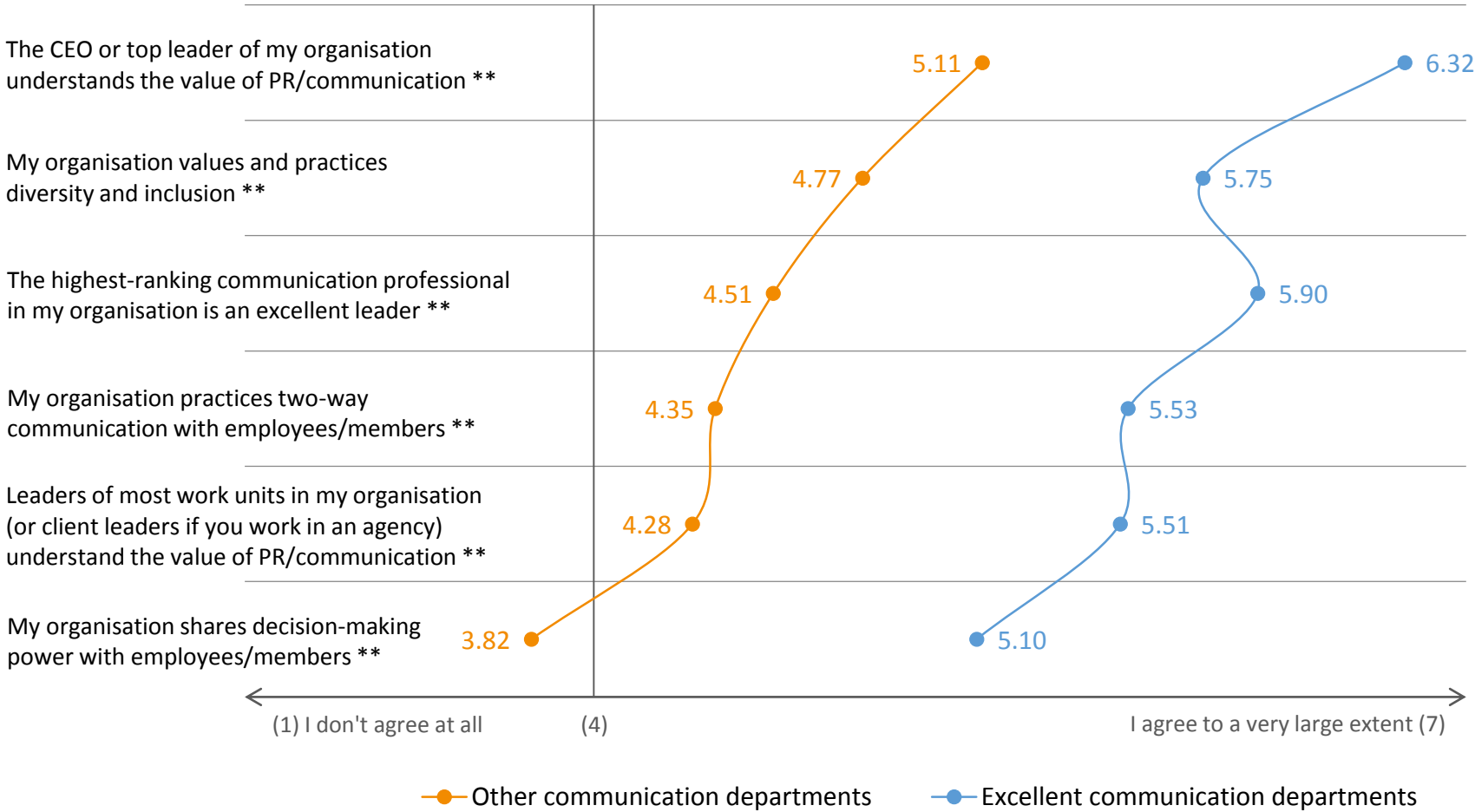


Excellent communication departments are better at providing up-to-date news briefings and media monitoring to decision-makers

Weekly or daily provision of ...

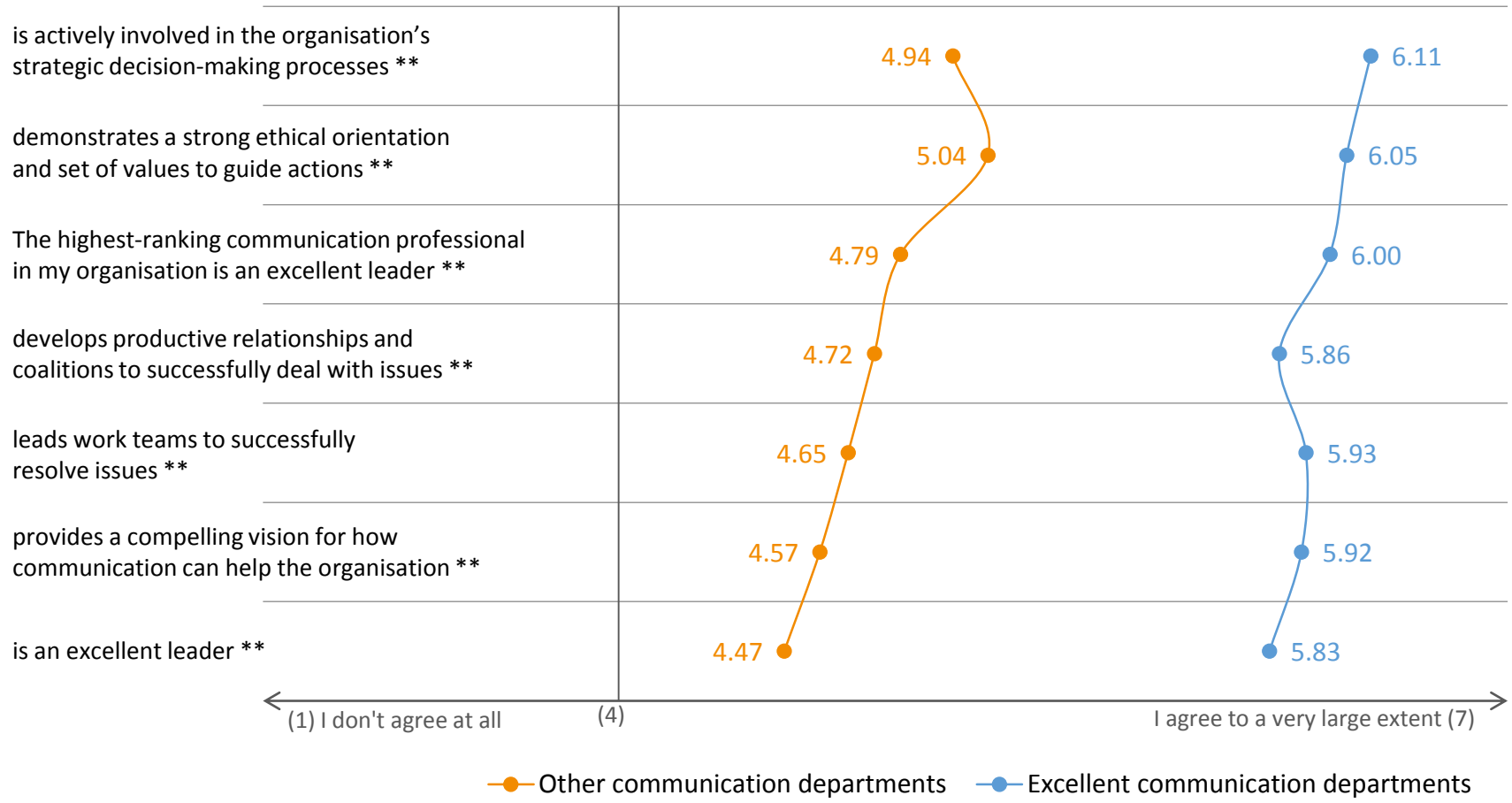


Excellent communication departments are embedded in organisations with great leadership and culture



Leadership performance is better in excellent communication departments

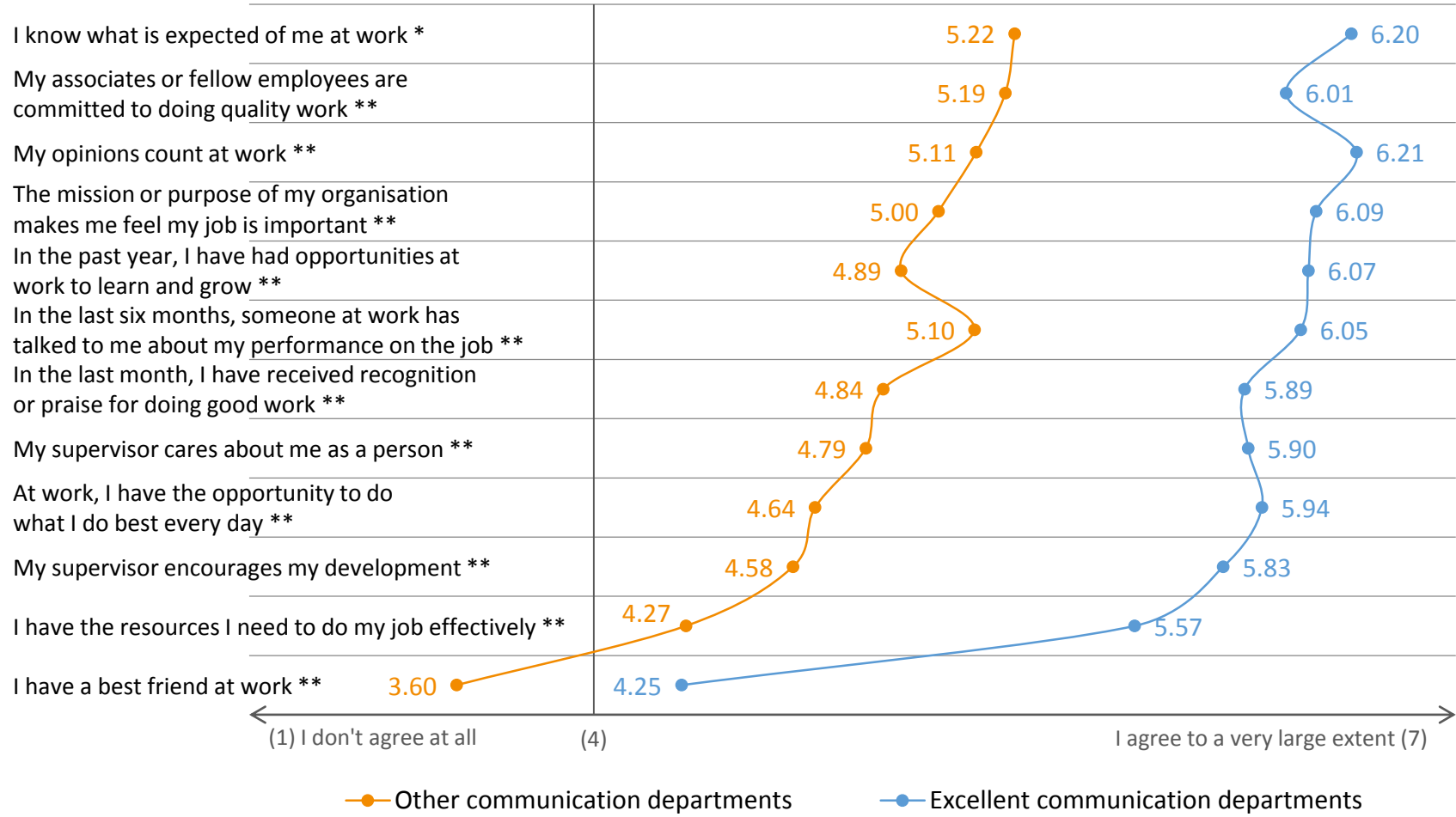
The highest ranking communication professional in the work group, unit or function ...



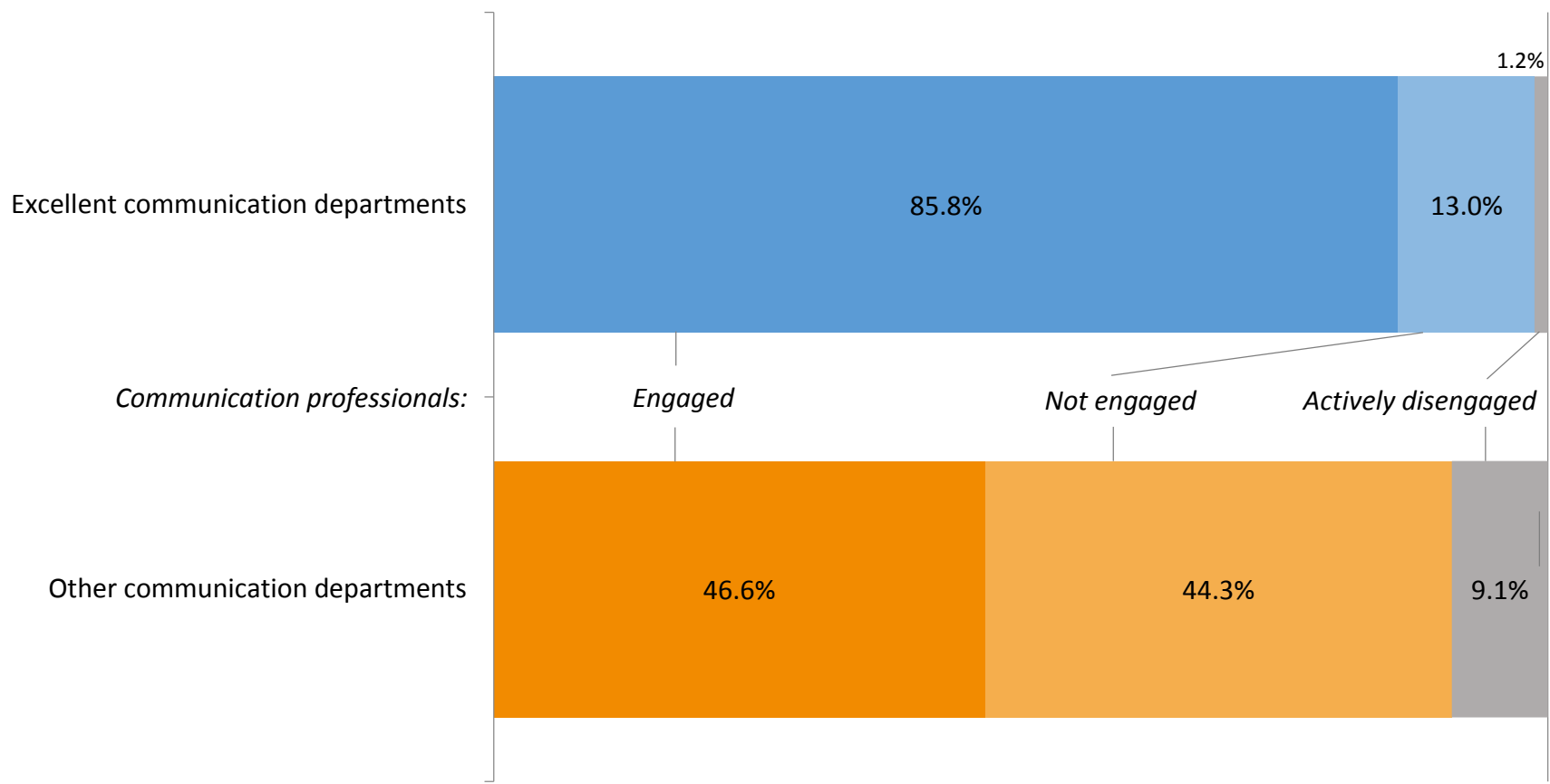
www.communicationmonitor.eu / Zerfass et al. 2018 / n = 2,271 communication professionals in communication departments across Europe. Q 12: Please assess the performance of your leader (the highest-ranking communication or PR professional in your work group, unit or function). If you are that leader, please self-evaluate for this question. Mean values. ** Highly significant differences (Pearson correlation, p ≤ 0.01).

Professionals in excellent departments have significantly higher work engagement

What practitioners report about their work experience

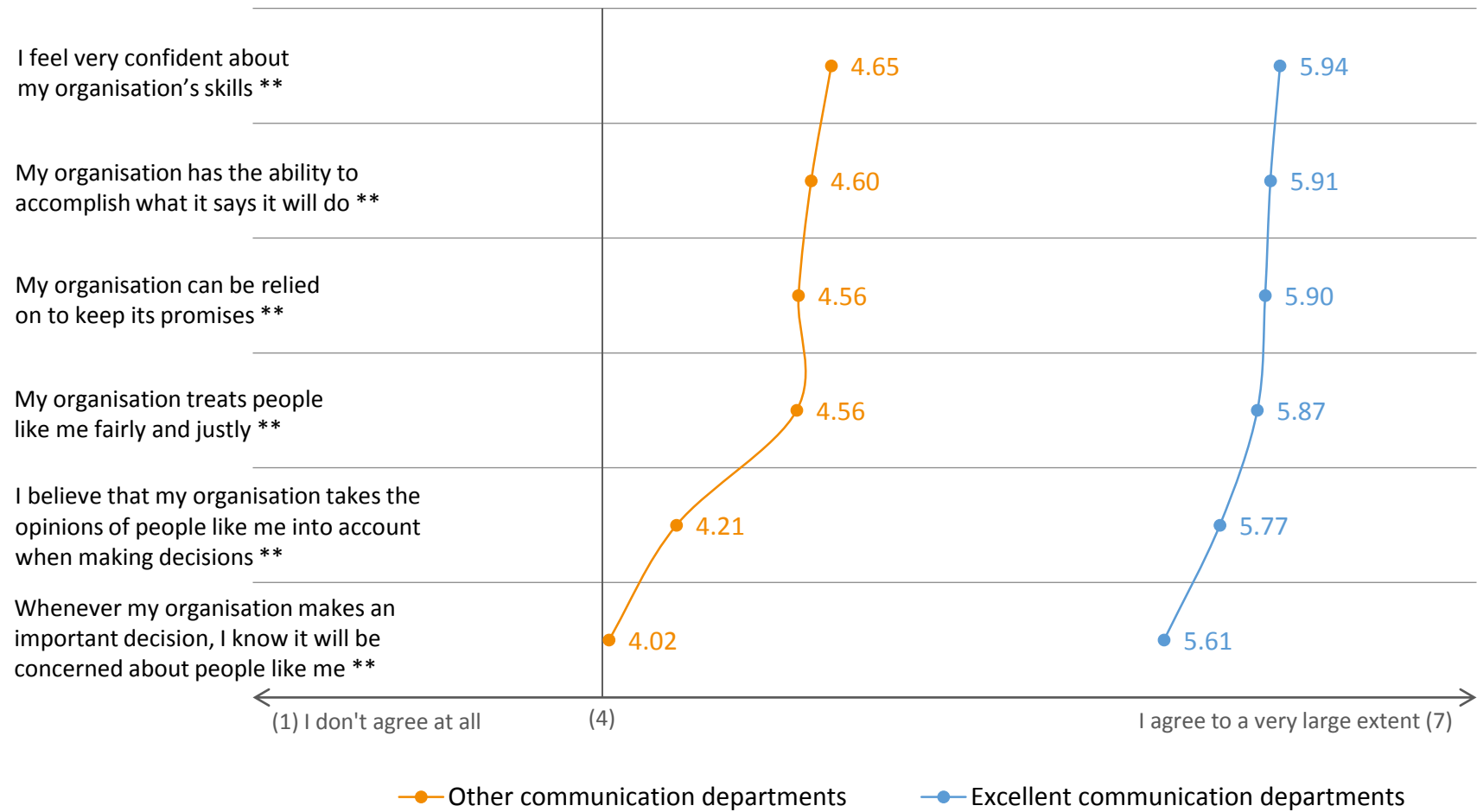


Professionals working in excellent communication departments are more deeply engaged than peers in other departments

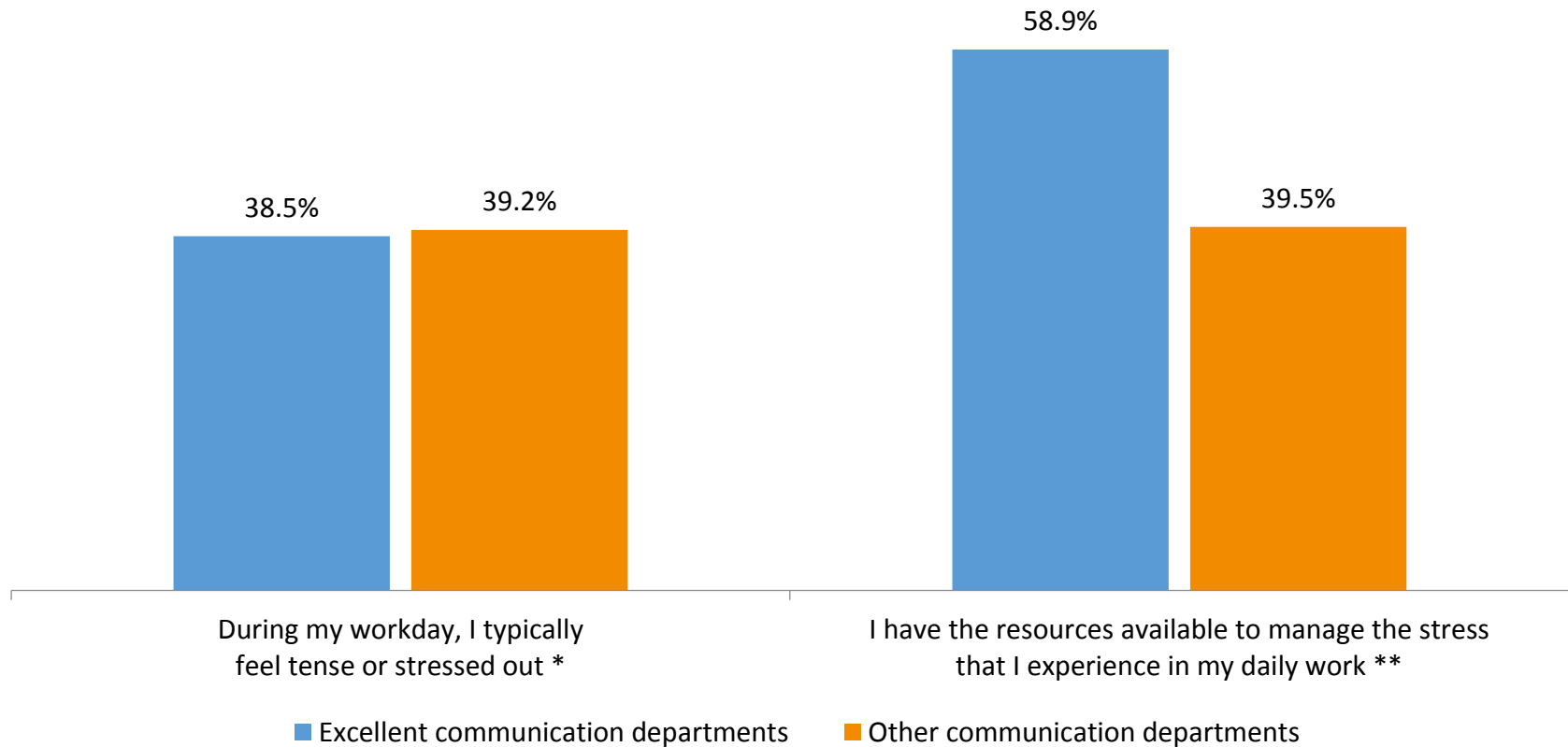


www.communicationmonitor.eu / Zerfass et al. 2018 / n = 2,271 communication professionals in communication departments across Europe. Q 13: Please share perceptions about your work engagement. For reliability analysis, Cronbach's alpha was calculated to assess the internal consistency of the subscale for positive affect, which consists of 12 questions. The internal consistency of the item battery is satisfying, with Cronbach's alpha for positive affect = 0.910. Engaged: average mean > 5.00; not engaged: 2,92 < average mean ≤ 5.00; actively disengaged: average mean ≤ 2.92. Highly significant differences (chi-square test, p ≤ 0.01, Cramér's V = 0.300).

Communication professionals working in excellent departments trust their organisation to a higher extent

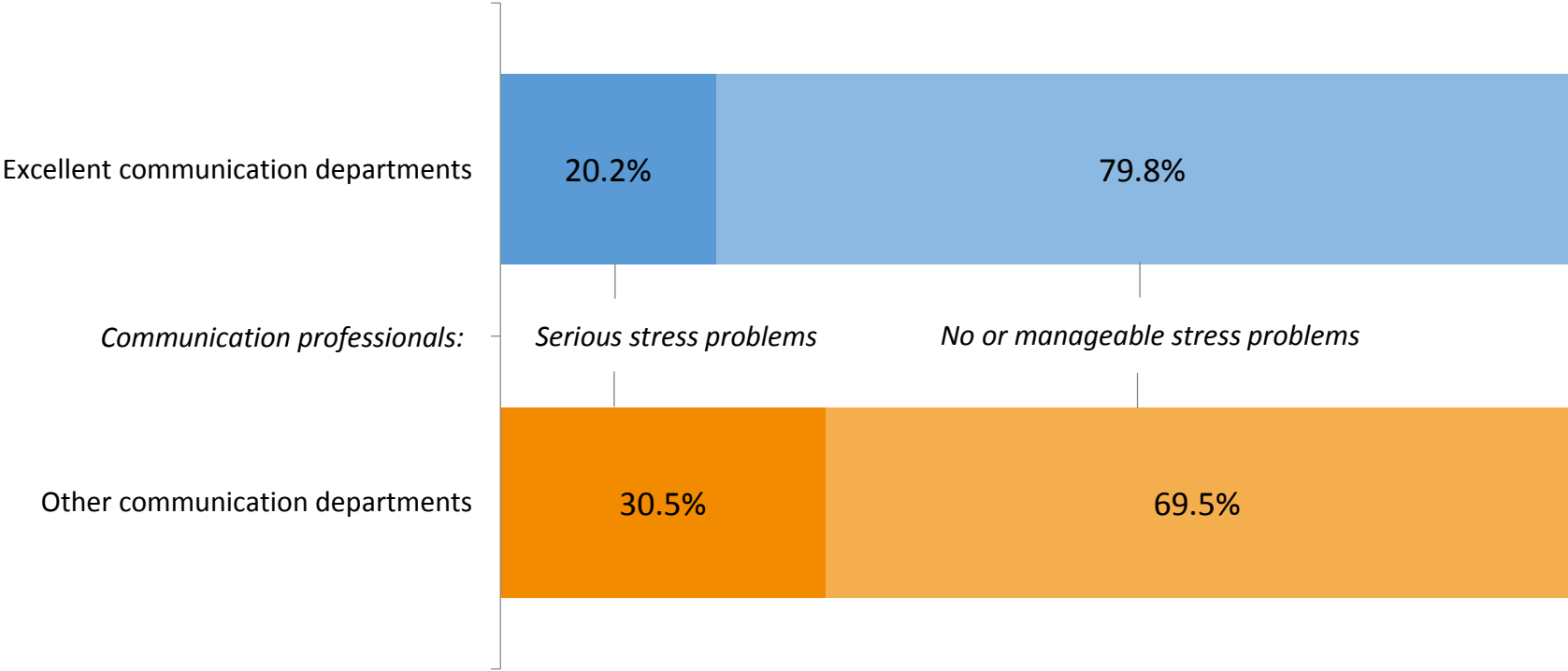


Excellent communication departments are better in enabling practitioners to manage their daily stress at work

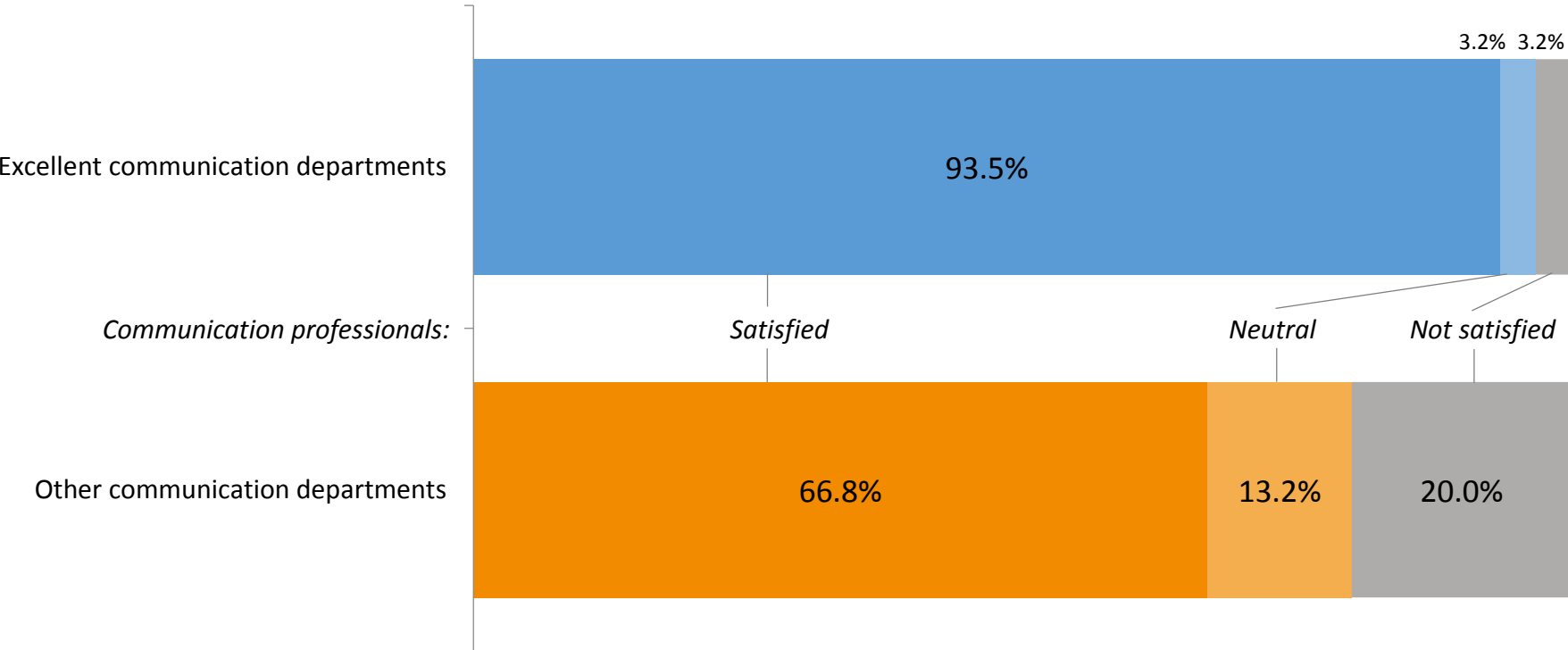


www.communicationmonitor.eu / Zerfass et al. 2018 / $n \geq 2,263$ communication professionals in communication departments across Europe. Q 17: How much do you agree or disagree with the following statements? Scale 1 (Strongly disagree) – 5 (Strongly agree). Scale and items derived from the Workplace Survey developed by the American Psychological Association and Harris Interactive (2012, p. 16). Percentages based on scale points 4-5. * Significant differences (chi-square test, $p \leq 0.05$). ** Highly significant differences (chi-square test, $p \leq 0.01$).

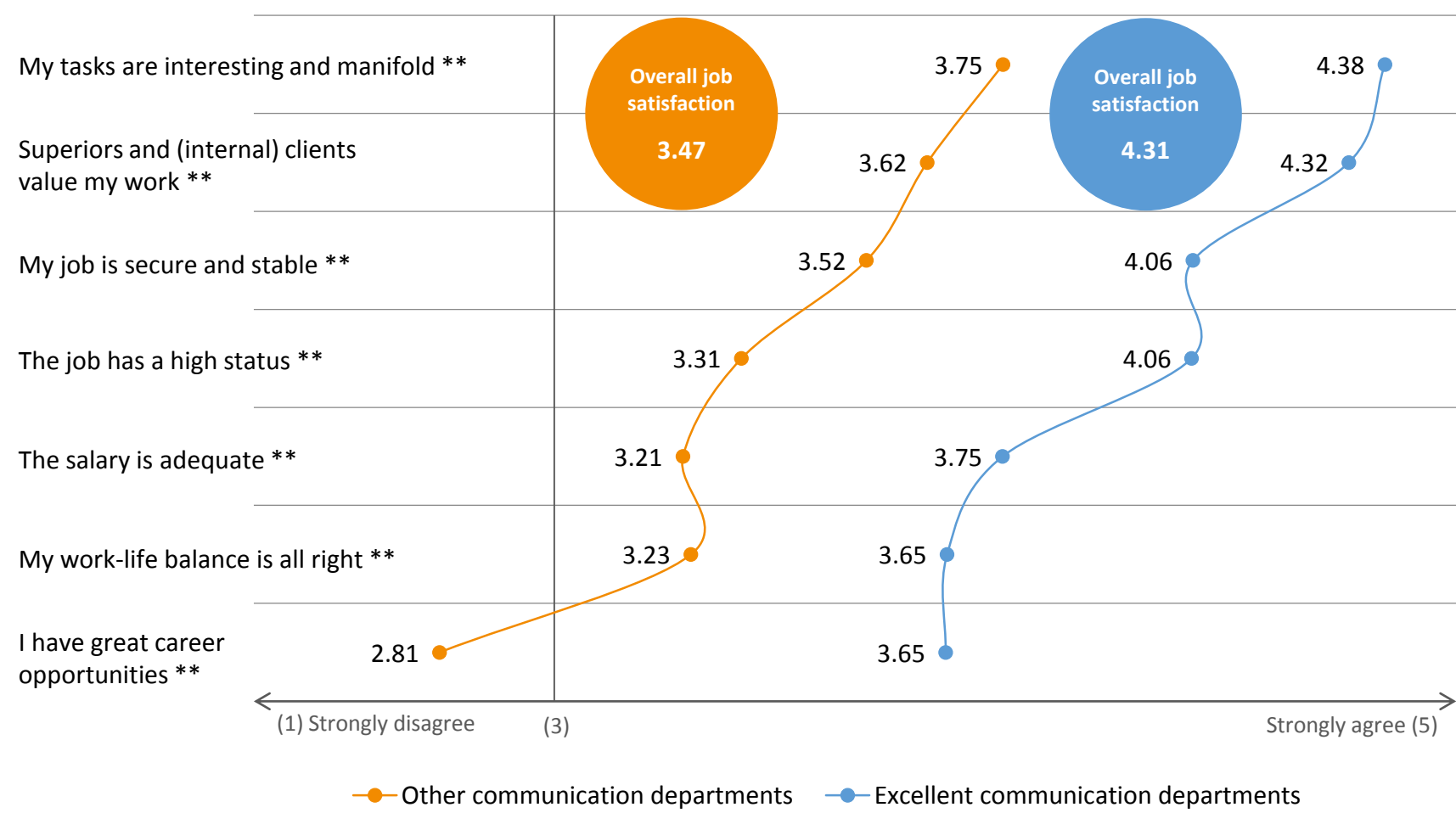
A lower proportion of communication professionals working in excellent departments have serious stress problems



Professionals working in excellent communication departments have significantly higher job satisfaction

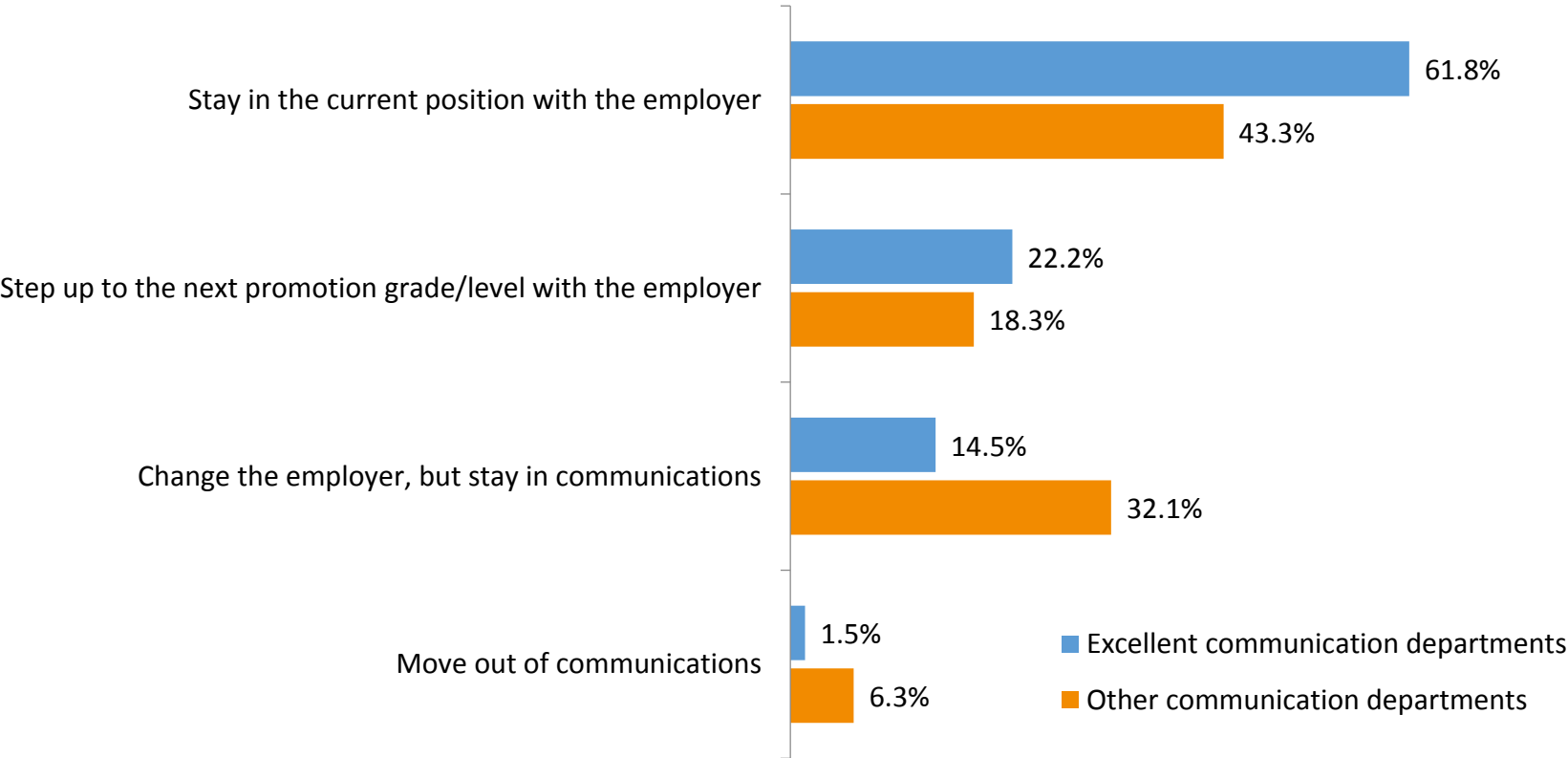


Job satisfaction in excellent communication departments is higher in all dimensions – especially with regard to perceived job status and career opportunities



Practitioners working in excellent communication departments are significantly more loyal to their employer

Career development plans within the next 12 months



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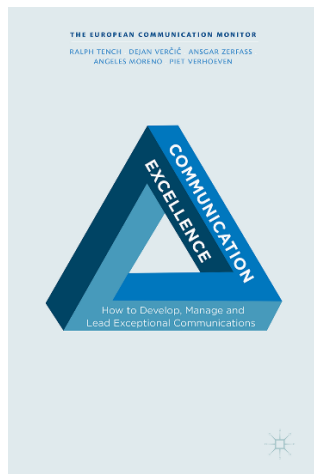
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How to Develop, Manage and Lead Exceptional Communications

by R. Tench, D. Verčič, A. Zeffass, A. Moreno & P. Verhoeven

London: Palgrave Macmillan 2017, 247 pp., ISBN 978-3-319-48859-2

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