

# EUROPEAN COMMUNICATION MONITOR 2008

Trends in Communication Management and  
Public Relations – Results and Findings



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[www.communicationmonitor.eu](http://www.communicationmonitor.eu)



COMMUNICATION DIRECTOR  
*Magazine for Corporate Communications and Public Relations*

CISION

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# Overview



# Key facts

## European Communication Monitor 2008

- \_ The second transnational survey on future trends in communication management and public relations in Europe, conducted in the summer of 2008
- \_ Most comprehensive analysis of the European market until now with more than 1,500 participating professionals from 37 countries
- \_ An academic research project conducted by a group of professors from 10 countries, led by Prof. Dr. Ansgar Zerfass, University of Leipzig
- \_ Organised by EUPRERA (European Public Relations Education and Research Association), a network of leading scholars from more than 30 countries; supported by Communication Director Magazine and Cision

## The research highlights:

- \_ Current developments for communication disciplines, fields of practice, and communication instruments
- \_ Strategic issues for communication management and controlling
- \_ Interactive channels, corporate social responsibility, intercultural challenges
- \_ Influence on management decisions, cooperation with agencies, future budgets

## Academic task force

### Research team

- \_ Ansgar Zerfass, Prof. Dr., University of Leipzig (GE) – Lead Researcher
- \_ Angeles Moreno, Prof. PhD, University Rey Juan Carlos, Madrid (ES)
- \_ Ralph Tench, Prof. PhD, Leeds Metropolitan University (UK)
- \_ Dejan Verčič, Prof. PhD, University of Ljubljana (SI)
- \_ Piet Verhoeven, Ass. Prof. Dr., University of Amsterdam (NL)

### Advisory board

- \_ Emanuele Invernizzi, Prof. Dr., IULM University, Milano (IT)
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- \_ Ryszard Lawniczak, Prof. Dr., Poznan University of Economics (PL)

### Statistical analysis and organisational support

- \_ Stephanie Krahl, B.A., University of Leipzig (GE)

# Partners

## **Media partner: Communication Director Magazine**

- \_ Communication Director is the only transnational magazine dealing with the practice of strategic corporate communication and linking theory and practice in Europe
- \_ Four issues each year, in English language, distributed to opinion leaders and executives in communication departments throughout Europe
- \_ Reports exclusively on the European Association of Communication Directors
- \_ Published by Helios Media, a specialist publishing house based in Berlin and Brussels
- \_ [www.communication-director.eu](http://www.communication-director.eu)

## **Sponsor partner: Cision**

- \_ Cision is a leading supplier of integrated services and software solutions for reputation management, media monitoring and research of media contacts
- \_ With around 2,700 employees in North America and Europe, the Swedish-based company operates in ten countries and has partners in another 125
- \_ Cision has nearly 30,000 clients around the world, ranging from small businesses and organisations to major international clients
- \_ [www.cision.com](http://www.cision.com)

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## Quotation

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- You are welcome to quote from the content of this survey and reproduce any graphics, subject to the condition that the source including the internet address is clearly quoted and depicted on every chart. See the imprint for more information.

## Suggested citation for this document (APA style)

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## Short quotation to be used in legends (charts/graphics)

- Source: European Communication Monitor 2008 (Euprera/University of Leipzig)

# Research design and socio-demographic analysis





# Questions

## **Aims of the survey**

- \_ To monitor trends in communication management
- \_ to analyse the changing framework for the profession driven by European integration
- \_ to evaluate specific topics like interactive channels and online videos, corporate social responsibility, evaluation and communication controlling, client relationships, influence on management decisions

## **Target group**

- \_ PR professionals working in organisations and consultancies throughout Europe

# Methodology

## Survey method and sampling

- \_ online survey in June 2008 (4 weeks), English language
- \_ Pre-tested questionnaire with 14 sections; design based on hypotheses and instruments derived from previous research and literature
- \_ personal invitation to 20,000+ professionals throughout Europe via e-mail; additional invitations to participate via national branch associations and networks (partly self-recruiting); 3,000+ respondents and 1,500+ fully completed replies

## Analysis

- \_ methods of empirical research, descriptive and analytical (using SPSS tools)
- \_ results which have been statistically affirmed by ANOVA tests are marked by
  - ✓ ( $p \leq 0.001$ ; high significance) or by
  - ✓ ( $0.001 < p \leq 0.05$ ; weak significance)

# Socio-demographic analysis

## Full sample

- \_ 1,524 fully completed replies

## Geographical and cultural distribution \*

- \_ participants from 37 European states
- \_ Northern Europe (e.g. Norway, United Kingdom, Latvia) – 22.2%
- \_ Western Europe (e.g. Germany, Netherlands, France) – 50.3%
- \_ Southern Europe (e.g. Italy, Slovenia, Croatia) – 15.9%
- \_ Eastern Europe (e.g. Poland, Czech Republic, Bulgaria) – 11.0%
- \_ Other – 0.6%

## Age

- \_ on average 39.4 years

## Gender

- \_ female – 54.8%, male – 45.2%

# Socio-demographic analysis

## Type of organisation

- \_ communication department / press office in an organisation – 67.4% (total)
  - \_ joint stock company (multiple owners, quoted on the stock market) – 27.9%
  - \_ private company (small numbers of owners, not on the stock market) – 17.8%
  - \_ government-owned organisation or institution – 12.1%
  - \_ non-profit organisation – 9.5%
- \_ communication consultancy / freelancer / public relations agency – 32.6%

## Experience in communication management and public relations

- \_ up to 3 years – 16.2%
- \_ 4 to 5 years – 14.3%
- \_ 6 to 10 years – 24.2%
- \_ more than 10 years – 45.3%

# Interpretation

## Valuable insights into the evolution of public relations in Europe

- \_ Based on a sample of more than 1,500 professionals from 37 countries with a thorough level of experience (average age 40 years, almost every second respondent has more than 10 years of experience in the field). This comprehensive research lays a solid ground for identifying major developments in communication management.
- \_ However, as there is no knowledge about the population of communication departments and agencies in Europe, the findings presented here can not claim representativeness. It is also necessary to note that economies, communication landscapes and PR professions are in rather different stages of development throughout Europe. Consequently, this survey does not focus on structural data (income, education, etc.) but on relevant issues and topics.
- \_ The analysis is based on high standards of empirical research: replies from participants not currently working in communication management (academics, students) have been sorted out, only fully completed questionnaires have been taken into account.
- \_ Statistical analysis is able to reveal differences between various groups of respondents (communication departments vs. agencies, age groups, major regions ...) and stimulates discussion about different segments of the market.

# Public relations and management decisions



## PR practioners influence strategic management

**75%** are taken seriously by senior management

but only **64%** are actually involved  
in decision making and planning

## Communication has a different standing in various organisations and is not as influential as in the States

	Europe					USA
	Joint stock companies	Private companies	Governmental organisations	Non profit organisations	Total	
<b>Advisory influence</b> PR recommendations taken seriously by senior management	5.47	5.04	5.01	5.04	<b>5.21</b>	<b>5.67</b>
<b>Executive influence</b> PR involved in decision making	4.96	4.56	4.71	4.67	<b>4.77</b>	<b>5.33</b>
<b>Status discrepancy</b> (difference between advisory & executive)	-0.51	-0.48	-0.30	-0.37	<b>-0.44</b>	<b>-0.34</b>



# Interpretation

## **Communication management plays a major role in European organisations**

- \_ Throughout Europe, public relations practitioners have achieved a relevant status in all kinds of organisations – they are able to influence senior management with their recommendations.
- \_ However, there is still a relevant gap between the advisory influence of communication experts and their involvement in planning and decision making. Arguably, understanding business processes (i.e. leadership, governance, innovation management, relationship structures, investing and capitalizing on assets) and getting involved in a conclusive way is a major challenge for the profession.
- \_ PR professionals in joint stock companies are leading the field both in terms of advisory and executive influence.
- \_ Their counterparts in private companies, governmental-owned and non-profit organisations have a similar standing. But private ownership means that PR professionals are less involved in decision making. This might reflect the fact that private companies are less dependent on public opinion than joint stock companies, who have more legal obligations to publish information, and organisations (e.g. non-profit) who rely heavily on support from politicians as well as their members/supporters.

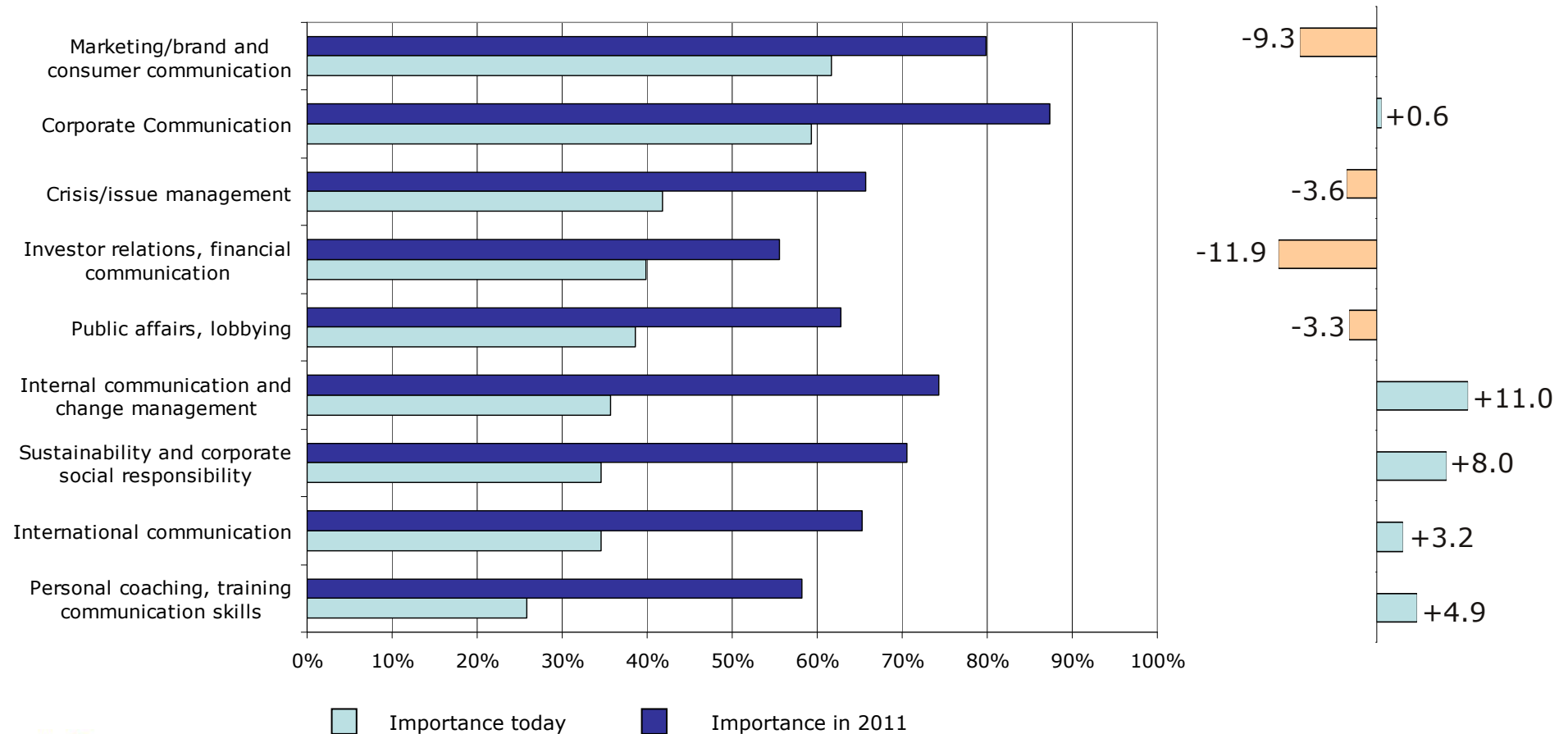
## Disciplines and communication channels in 2011



# Expected development of disciplines and fields of practice

*Important discipline*

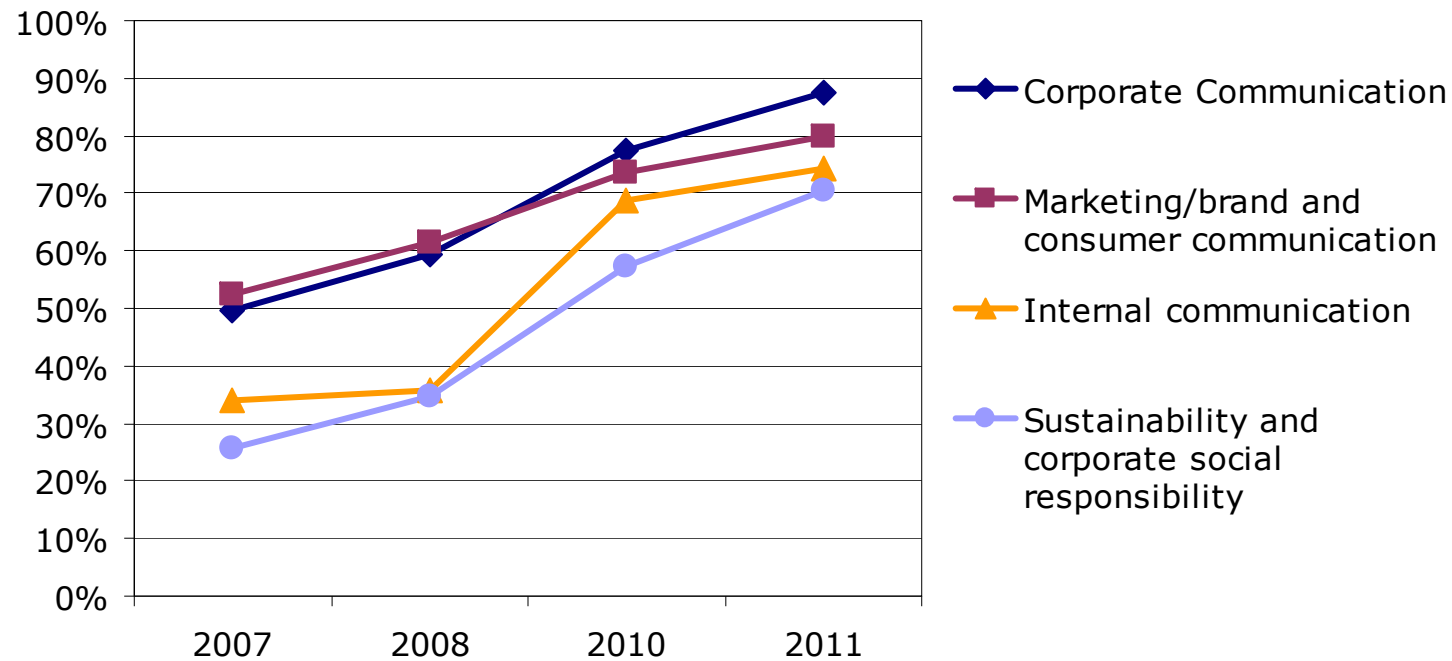
*2011: compared to average increase*



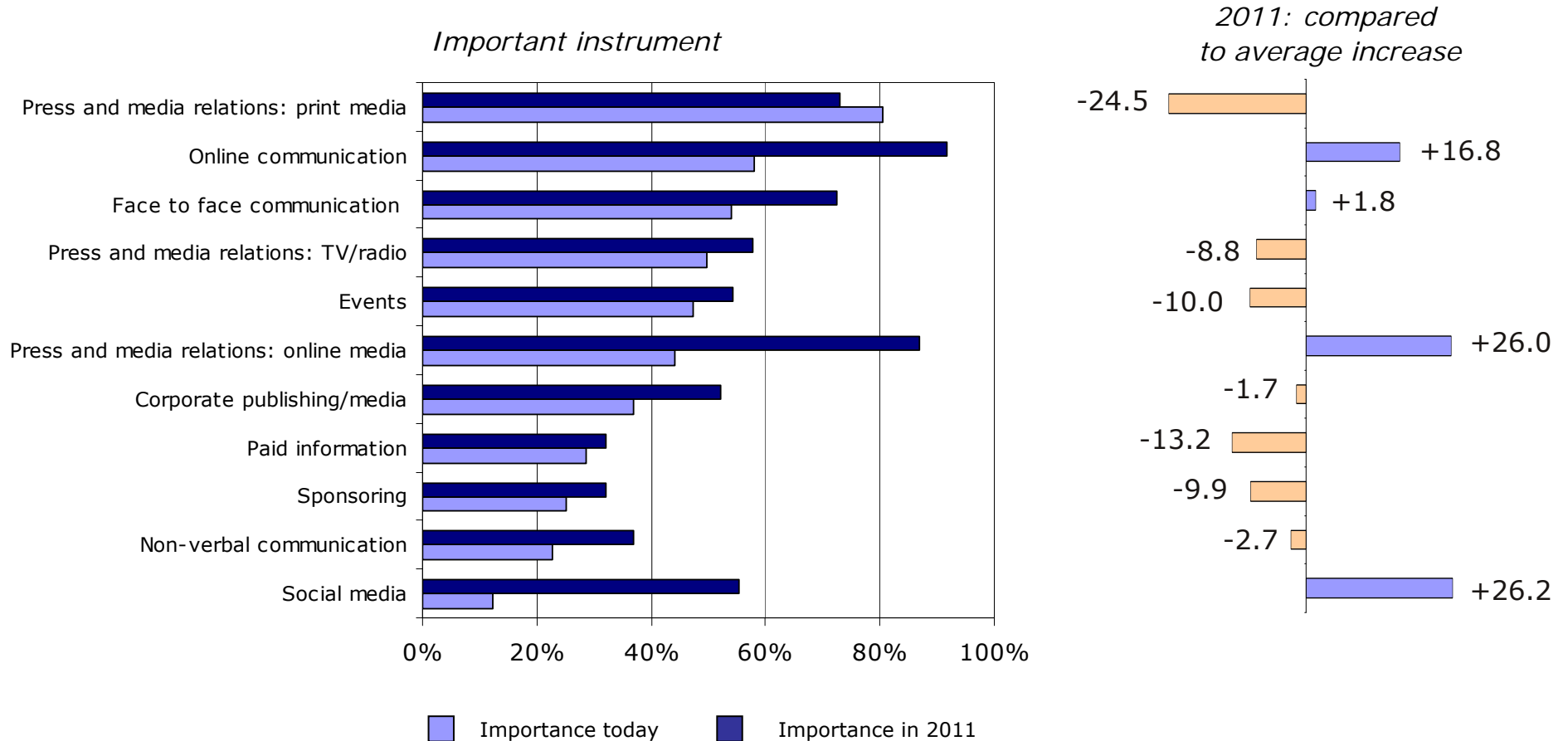
## Most important disciplines in communication management in Europe

Today		In 2011		
1	Marketing/Brand and Consumer Communication	1	Corporate Communication	↗
2	Corporate Communication	2	Marketing/Brand and Consumer Communication	↓
3	Crisis/Issue Management	3	Internal Communication and Change Management	↑
4	Investor Relations, Financial Communication	4	Sustainability/CSR	↑
5	Public Affairs / Lobbying	5	Crisis/Issue Management	↘

# Long-term development of communication disciplines



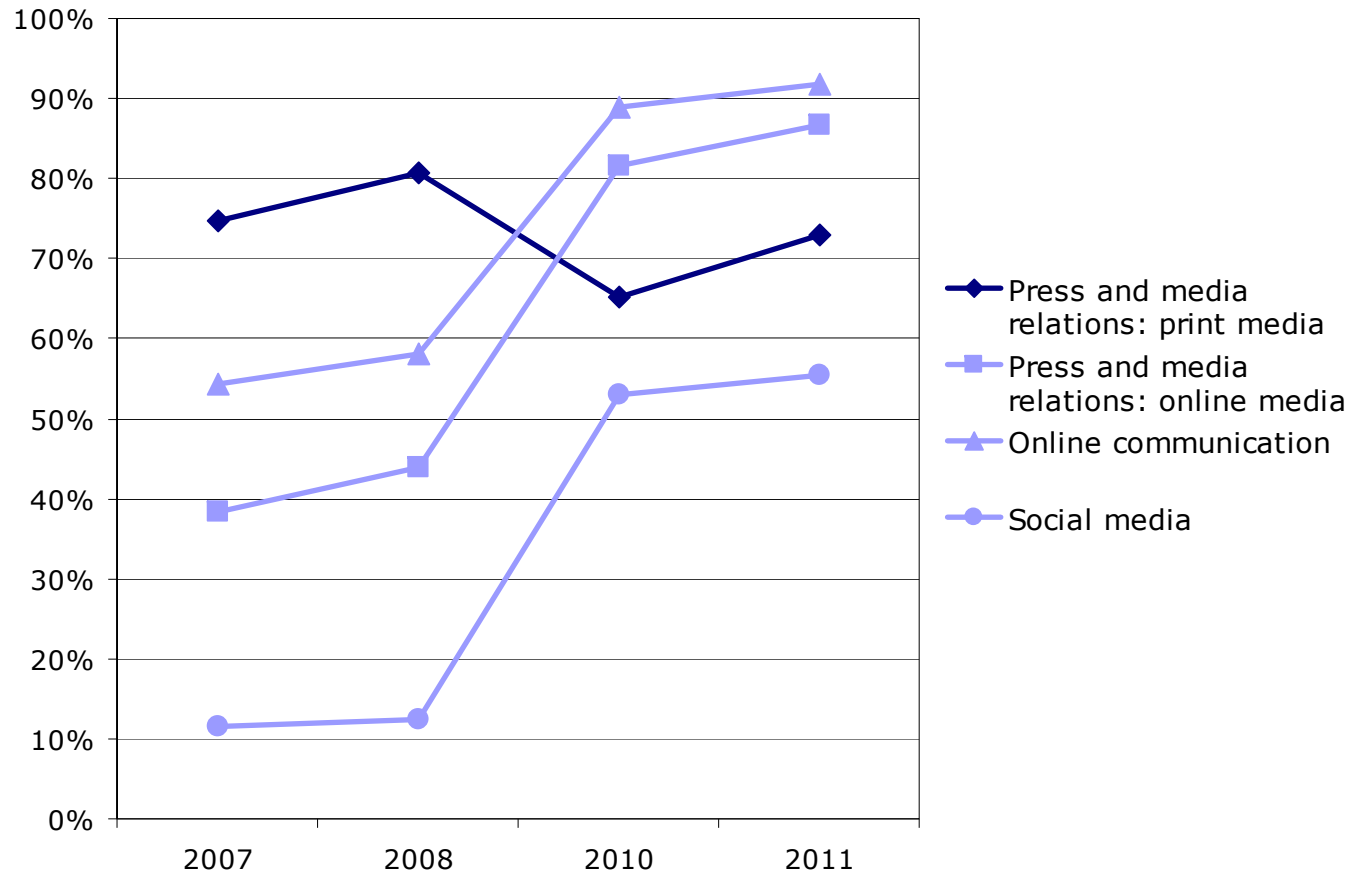
# Expected development of communication channels



## Important channels and instruments for communication management

Today		In 2011		
1	Press and media relations: print media	1	Online communication	↗
2	Online communication	2	Press and media relations: online media	↑
3	Face to face communication	3	Press and media relations: print media	↓
4	Press and media relations: TV / radio	4	Face to face communication	↗
5	Events	5	Press and media relations: TV / radio	↘

## Online channels are clearly on the upswing, while addressing the print media is losing ground





# Interpretation

## **Respondents expect a changing relevance of disciplines**

- \_ Corporate communication will succeed today's forerunner marketing/consumer communication as the most important field of practice.
- \_ Internal/change communication and sustainability/CSR are predicted to be the fastest-growing disciplines within communication management in Europe.

## **Broader tool set within public relations**

- \_ Managing relationships with online channels and social media gains dramatically in importance, while the traditional way of addressing gatekeepers is reinvented by contacting online journalists more intensively.
- \_ At the same time, face-to-face communication is on an upswing – though the prospects are less positive than in last year's survey.

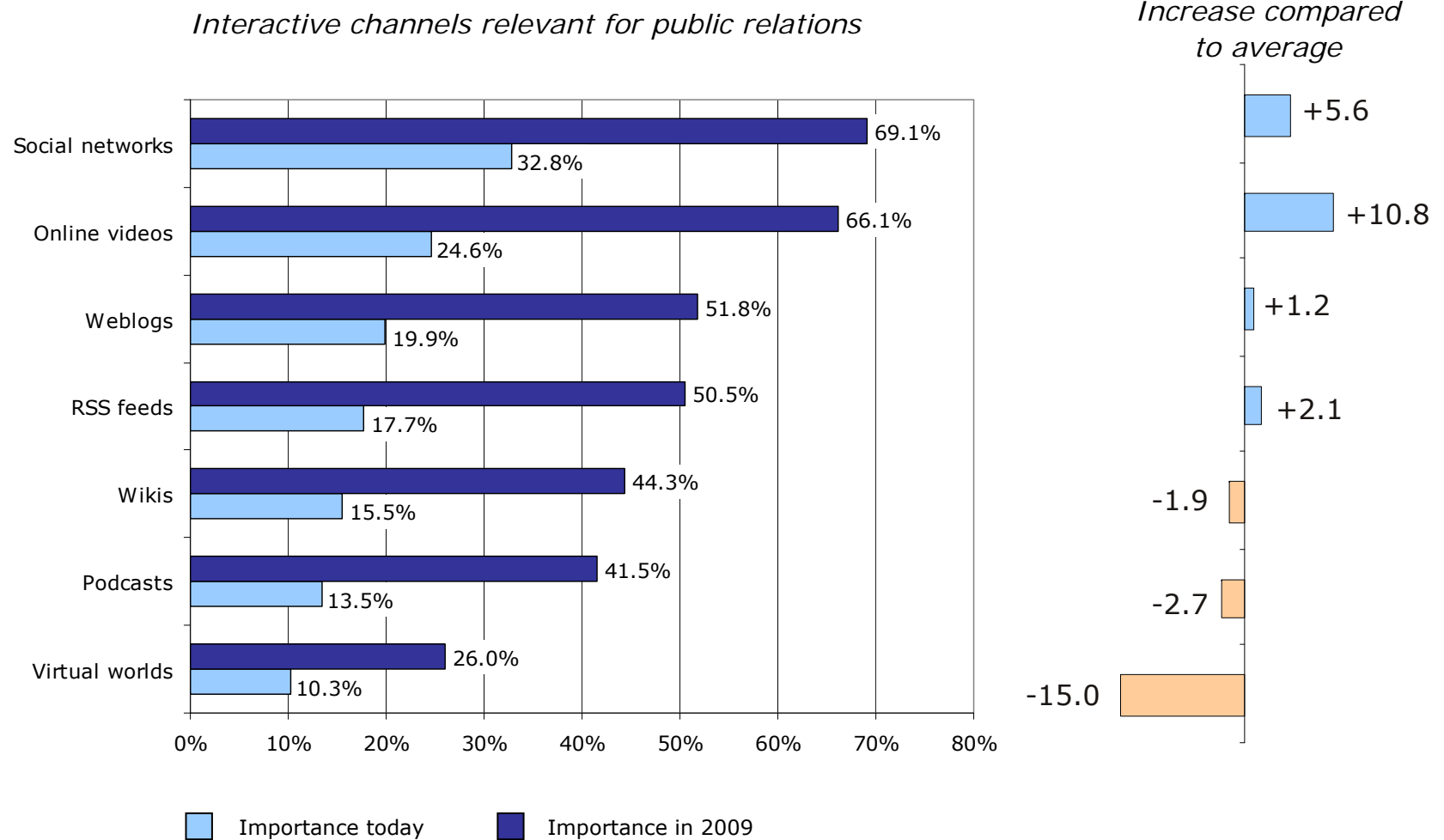
## **Stable trends within the profession**

- \_ Overall, the assessment of future developments within this 2008 survey carries forward the insights of the previous survey in 2007; this substantiates the relevance of the research results.

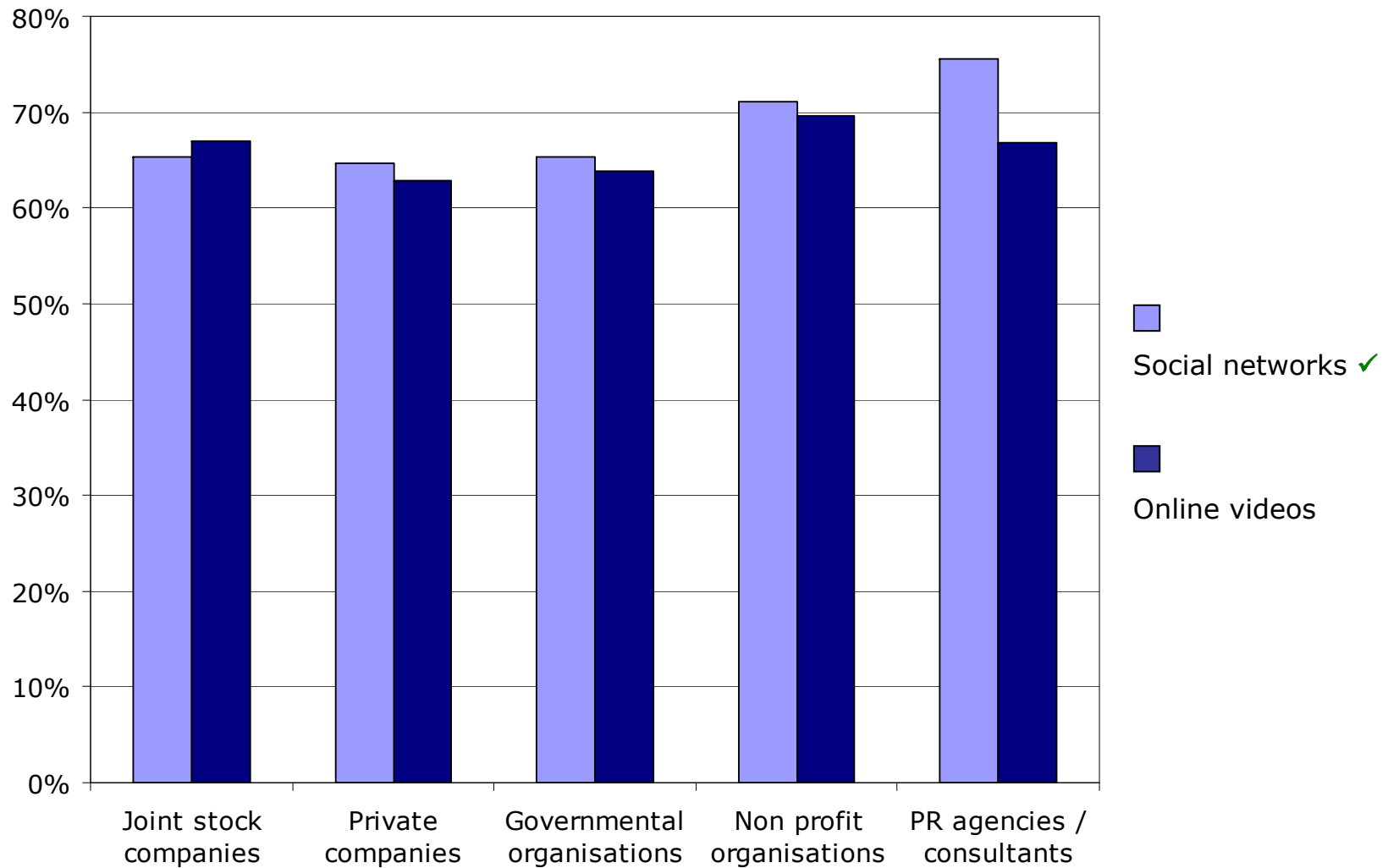
## Emerging interactive channels: Social media, networks and online videos



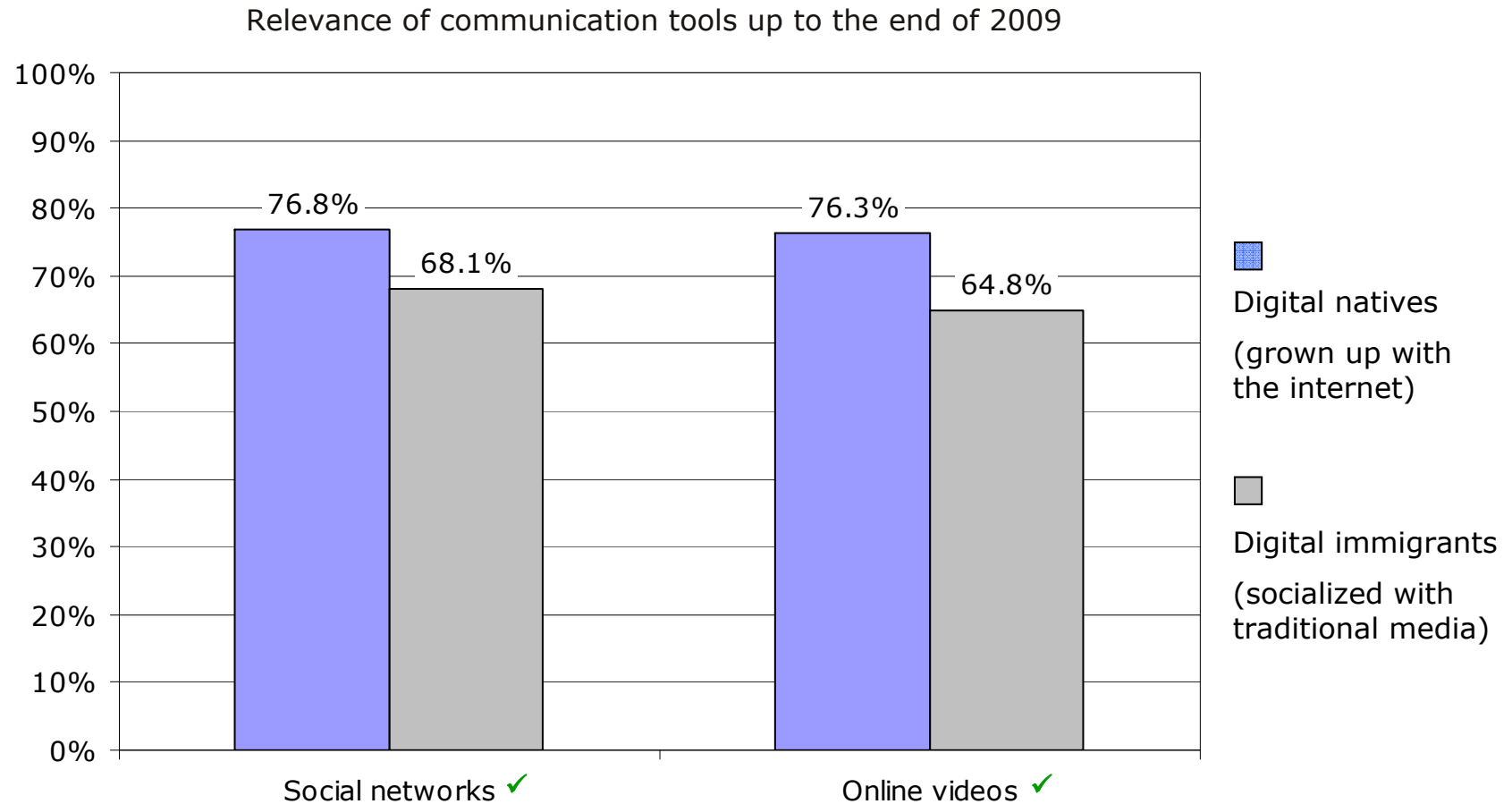
# PR professionals in Europe realise the challenge



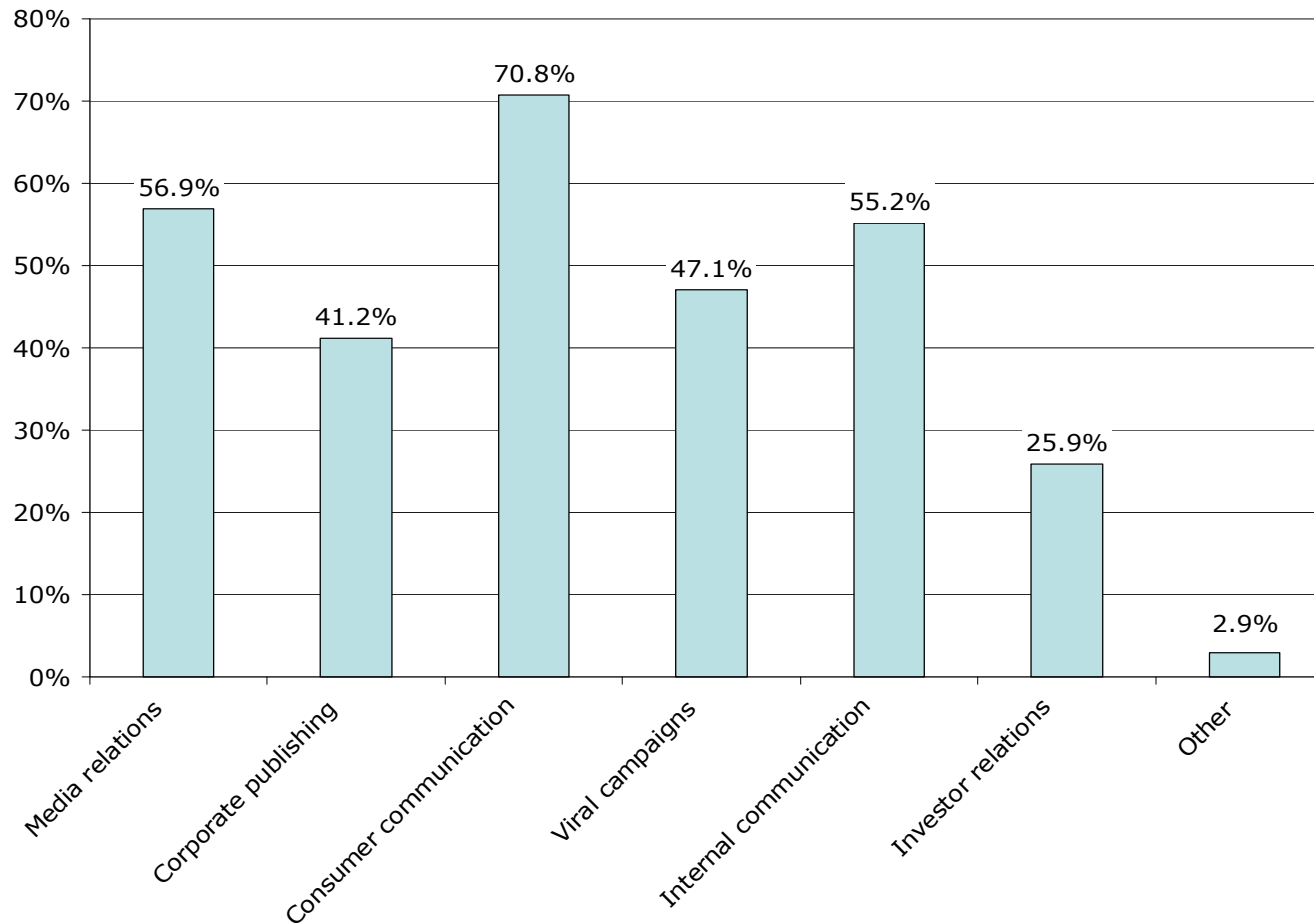
# Relevance of social networks and online videos in 2009



# Digital natives are forerunners, especially when thinking of online videos



## Within the PR community, online videos are rated as an effective tool for different fields of practice



## Online videos and communication management

Moving pictures on the web are most relevant for...		
1	Consumer communication (e.g. product and image videos)	70.8%
2	Media relations (e.g. social media press release)	56.9%
3	Internal communication (e.g. intranet tutorials)	55.2%
4	Viral campaigns (e.g. YouTube clips)	47.1%
5	Corporate publishing (e.g. sustainability reports)	41.2%
6	Investor relations (e.g. streaming shareholder meetings)	25.9%

# Interpretation

## **Interactive channels are growing, but judged in different ways**

- \_ Overall, all forms of digital communication in public relations are valued twice as important in 2009 compared with the situation today.
- \_ Wikis, podcasts and especially virtual worlds have less potential than other channels. This might reflect practice disappointment (i.e. with applications in Second Life) but can also highlight the fact that many professionals are already using those channels, which delimitates the growth factor.
- \_ Online videos and social networks are the hottest topics within the next months.

## **Public relations will move from print to video within the near future**

- \_ Online videos are seen as an important instrument to attract consumers, journalists, and employees.
- \_ The dawn of the video age will have a major impact on media relations and internal communication, affecting current rules and resources within those fields. Delivering product and image videos to consumers is the most popular measure, although this might just transfer the mechanism of TV spots. Only a minority realise the potential of enhancing corporate media with moving pictures.



# Strategic issues



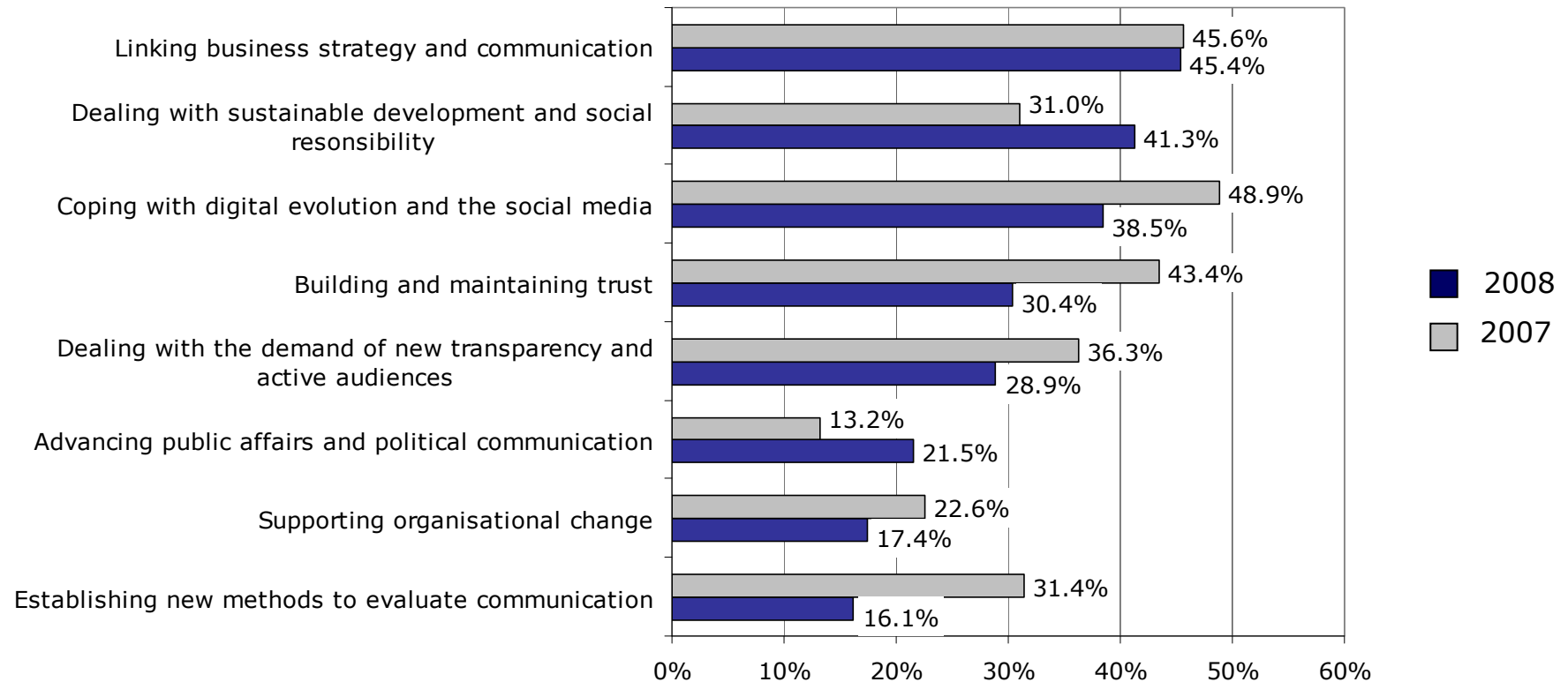
# Most important issues for communication management



# Challenges for communication management in Europe

Most important issues within the next three years		
1	Linking business strategy and communication	45.4%
2	Dealing with sustainable development and social responsibility	41.3%
3	Coping with the digital evolution and the social web	38.5%
4	Building and maintaining trust	30.4%
5	Dealing with the demand of new transparency and active audiences	28.9%

## Relevance of strategic issues: results compared to last year's survey



# Interpretation

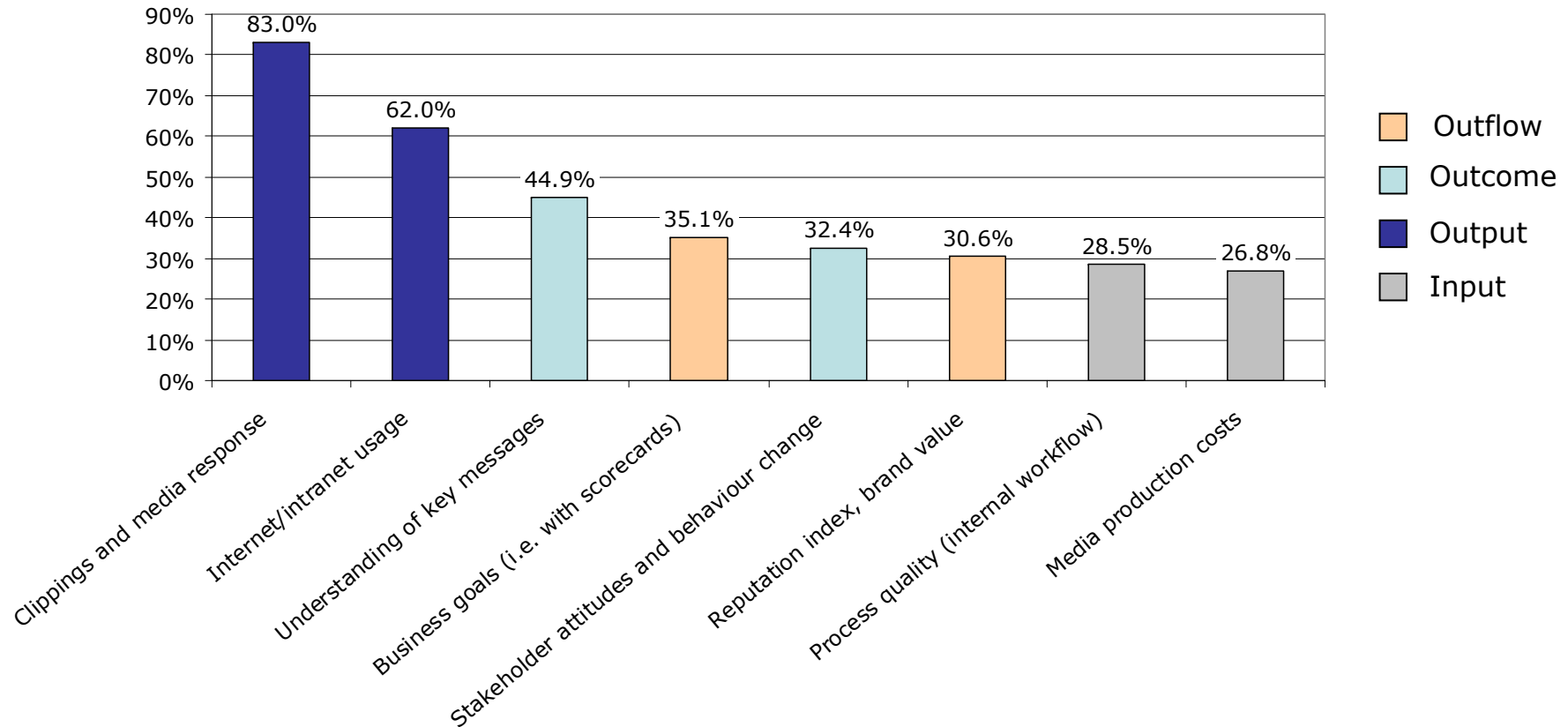
## Challenges for communication management in Europe

- \_ PR Professionals face three major challenges in the near future: linking their function to business strategies, dealing with sustainable development and social responsibility, and coping with the digital evolution and the social web. Four out of ten respondents give top priority to those issues.
- \_ A comparison with last year's survey shows that the request to advance communication in the fields of social responsibility (+10%) and public affairs (+8%) has grown considerably during the last months. These are the only two issues that are rated higher than last year.
- \_ Communication controlling is the most important and enduring issue for the profession. Strategic aspects of value creation (linking business strategy and communication) are seen as a challenge by 45% of the respondents, like last year. The operational level has been improved: only 16% (last year: 31%) still think that the development of new evaluation methods is a major issue.
- \_ This might be an effect of the ongoing debate in theory and practice: PR professionals have learned that there is already a wealth of reliable instruments for assessing communication activities, but there is no easy way to integrate them into concepts for managing public relations and demonstrating the bottom line.

# Evaluation and communication controlling



# How PR professionals in Europe monitor and measure their activities

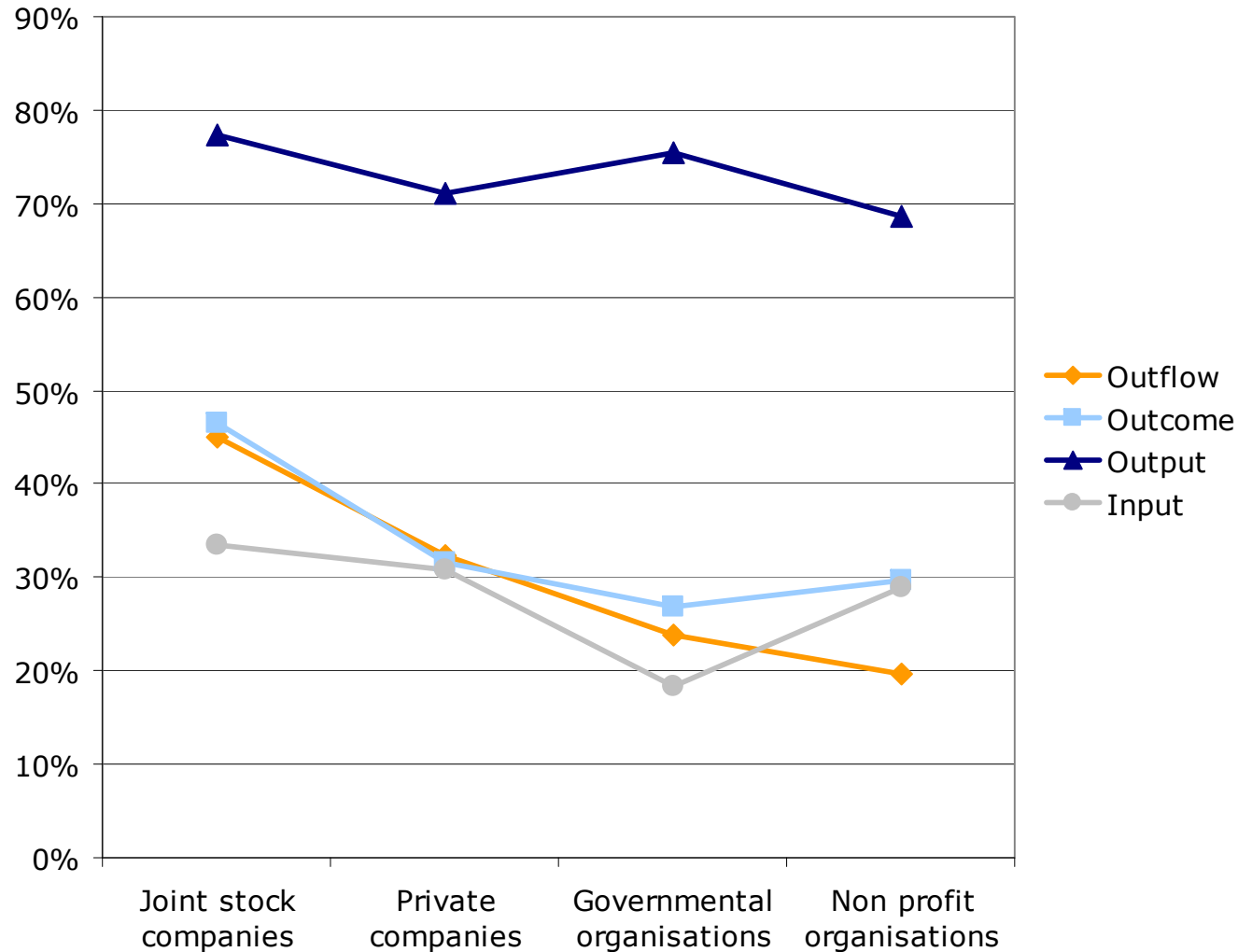


## Today, communication management centres on the output level and neglects both outflow and input

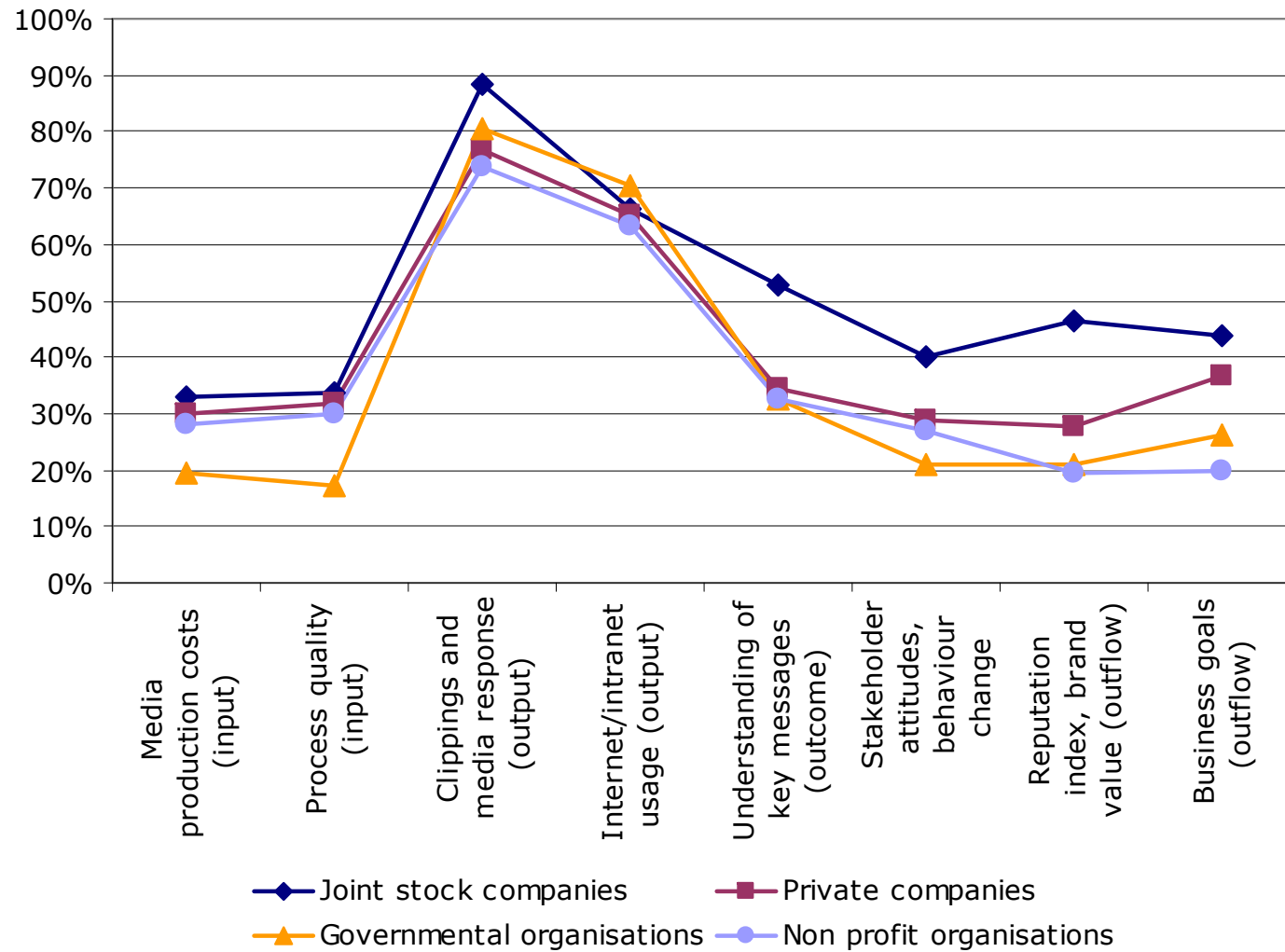
Levels of communication controlling	
<b>Outflow (microeconomic effects)</b> Enhancing business goals, reputation, brand value	32.9%
<b>Outcome (effects on stakeholders)</b> Understanding, stakeholder attitudes, behaviour change	38.7%
<b>Output (availability of messages/offerings)</b> Clippings and media response, internet/intranet usage	72.5%
<b>Input (initiation of communication)</b> Process quality (internal workflow), media production costs	27.7%



# Communication controlling in different organisations



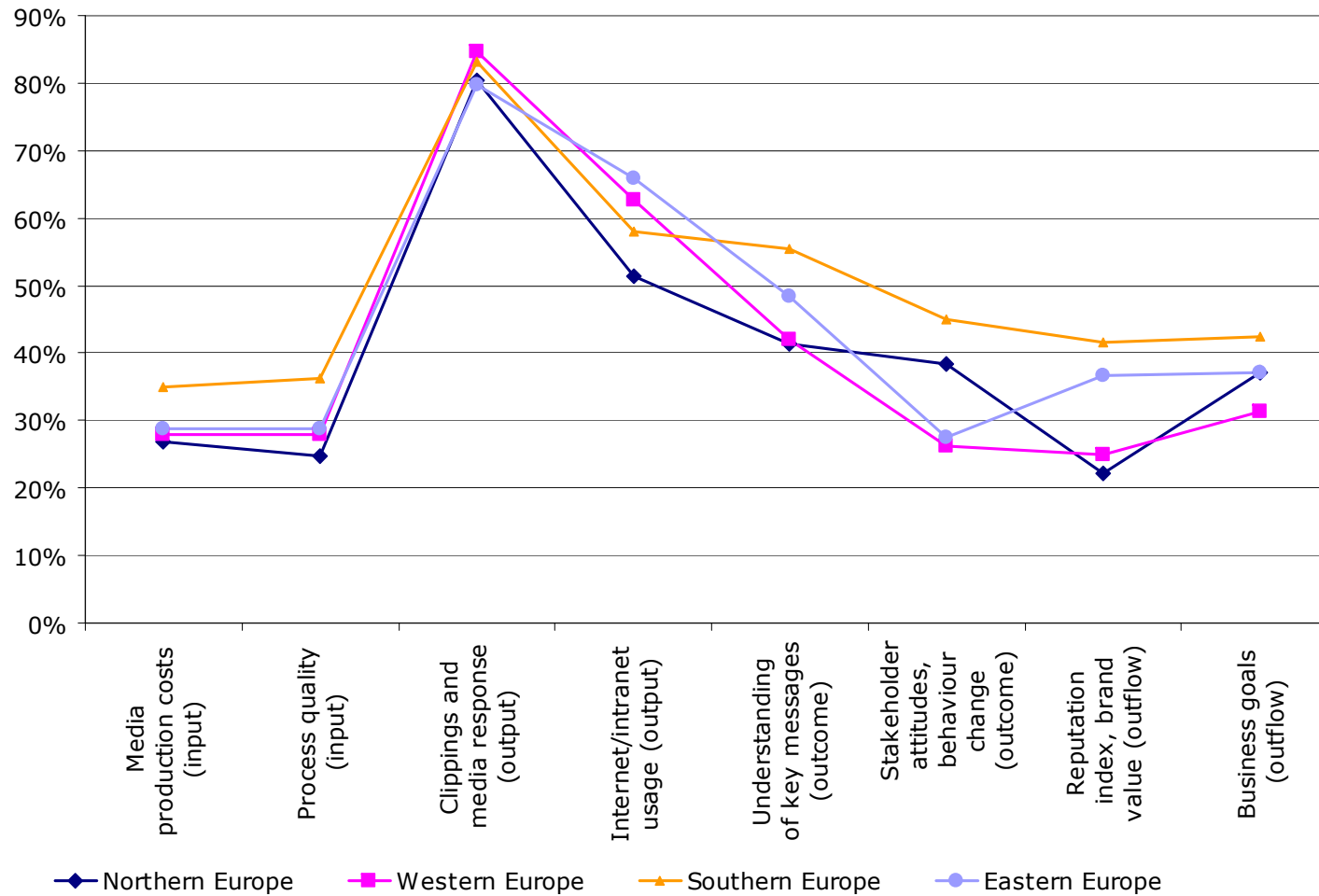
## Joint-stock companies are leading the evaluation field; governmental organisations are lavishing resources



## Methods used in different organisations (details)

	<b>Joint stock</b>	<b>Private</b>	<b>Governmental</b>	<b>Non profit</b>	<i>Overall</i>
Media production costs ✓	32.9%	29.8%	19.3%	28.2%	26.8%
Process quality ✓	33.8%	32.0%	17.2%	29.8%	29.8%
Clippings and media response ✓	88.4%	76.9%	80.6%	73.8%	83.0%
Internet/intranet usage	66.4%	65.1%	70.3%	63.4%	62.0%
Understanding of key messages ✓	52.7%	34.5%	32.5%	32.4%	44.9%
Stakeholder attitudes, behaviour change ✓	40.2%	28.7%	21.1%	26.9%	32.4%
Reputation index, brand value ✓	46.3%	27.9%	21.1%	19.3%	28.5%
Business goals ✓	43.8%	36.8%	26.4%	20.0%	35.1%

# Communication controlling in European regions



## Methods used in different regions (detailed data)

	Northern Europe	Western Europe	Southern Europe	Eastern Europe	Europe at large
Media production costs ✓	26.8%	27.9%	35.0%	28.8%	26.8%
Process quality ✓	24.8%	27.9%	36.2%	28.8%	29.8%
Clippings and media response	80.5%	84.6%	83.1%	79.7%	83.0%
Internet/intranet usage	51.4%	62.7%	58.1%	65.8%	62.0%
Understanding of key messages ✓	41.3%	42.0%	55.5%	48.5%	44.9%
Stakeholder attitudes, behaviour change ✓	38.4%	26.2%	44.9%	27.6%	32.4%
Reputation index, brand value ✓	22.2%	24.9%	41.6%	36.6%	28.5%
Business goals ✓	37.2%	31.4%	42.4%	37.1%	35.1%

# Interpretation

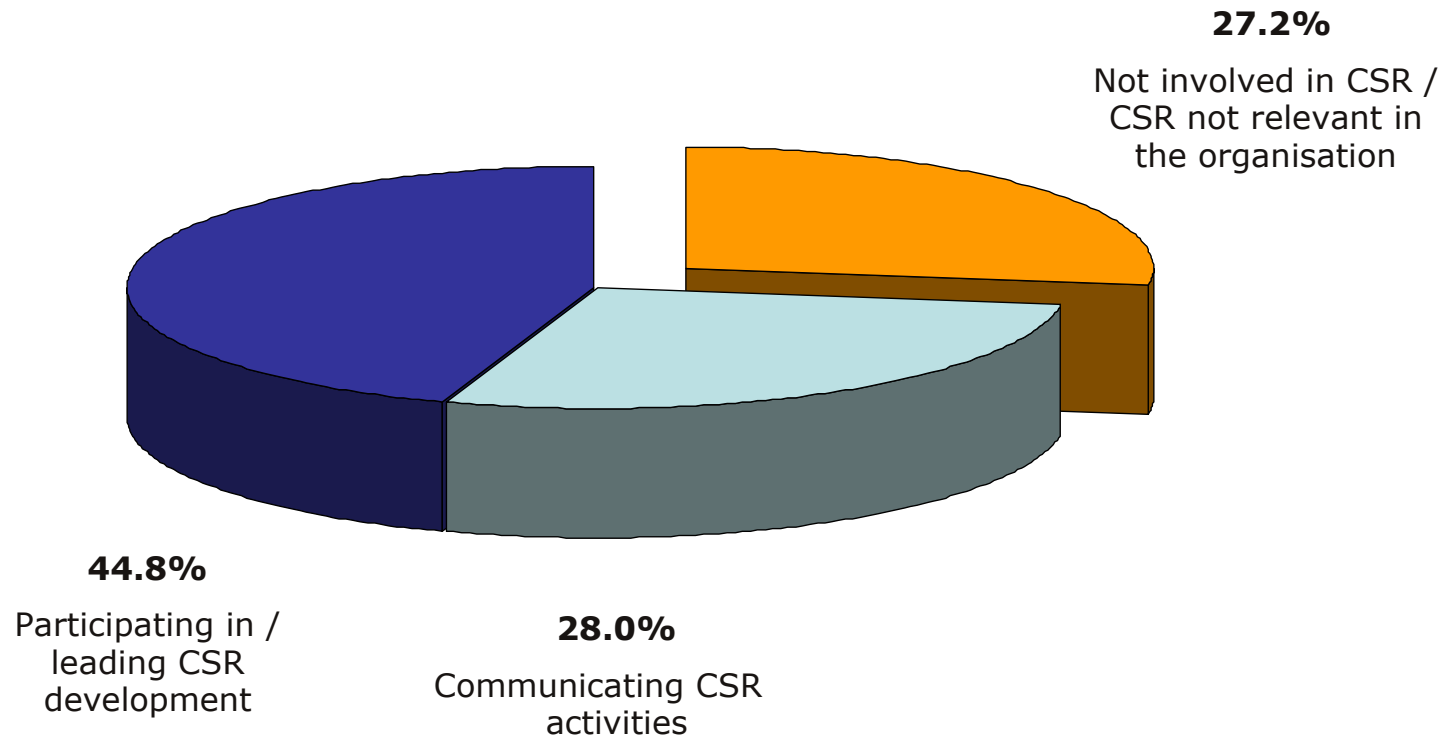
## **Restricted perceptions of measurement are dominating the field**

- \_ Communication managers in Europe rely on media monitoring (83%) and internet statistics (62%) to assess the effectiveness of their activities. All other methods are less important. As a consequence, the output level (availability of messages to stakeholders) is overemphasised. Only one out of three professionals tries to evaluate the outcome or outflow of communication activities.
- \_ Many professionals lose sight of the input level. Only 28% keep track of internal workflows, process quality and media production costs. This is especially true in government-owned organisations and – quite surprisingly – in developed public relations communities in Northern and Western Europe.
- \_ Methods to measure the impact on organisational goals are established in almost every second joint-stock company (45.0%), while only one out of five non-profit organisations (19.7%) utilizes scorecards or reputation/brand evaluation.
- \_ The practice of communication controlling is assessed quite differently by respondents from various regions. When interpreting these data it has to be taken into account that the debate on evaluation and measurement is relatively fresh and divergent throughout Europe. Practitioners might have a different understanding of concepts. E. g., scorecards have been extensively discussed by branch associations and academia in Sweden and Germany, but not so much in Southern Europe recently.

# Corporate social responsibility



## Three out of four PR professionals in Europe are involved in CSR activities





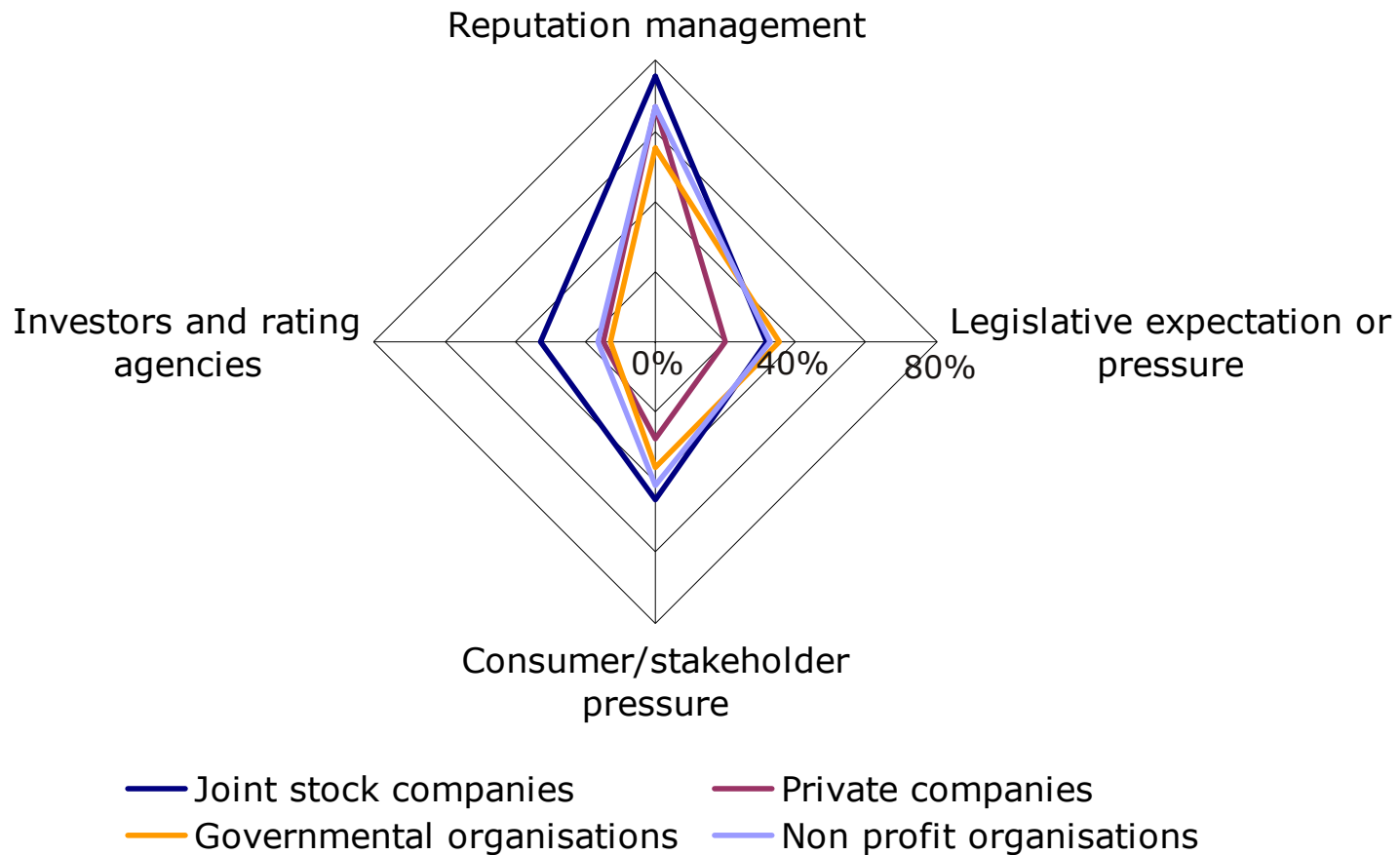
## Joint stock companies are driving the CSR debate

	Joint stock companies	Private companies	Governmental organisations	Non profit organisations
Project leadership for CSR development / participating in CSR development ✓	54.2%	40.1%	28.0%	37.5%
Communicating CSR Activities ✓	27.1%	30.1%	25.9%	23.6%
Not involved in CSR projects / CSR is not relevant in the organisation ✓	18.8%	29.7%	54.9%	38.1%

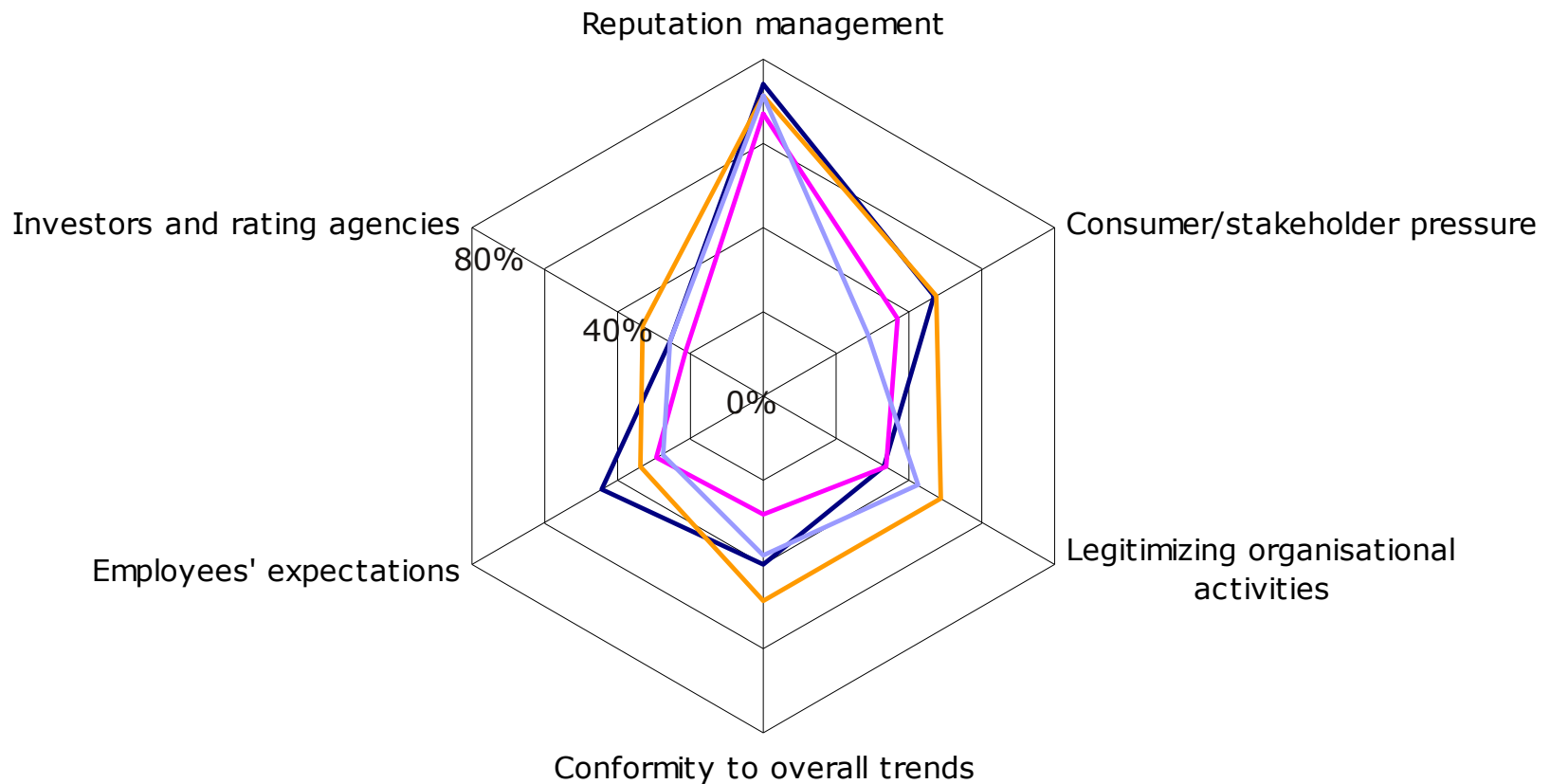
# Reputation management is a key driver for CSR

Main drivers for CSR activities		
1	Reputation management	69.8%
2	Business/organisational values	60.4%
3	Consumer/stakeholder pressure	40.0%
4	Legitimizing organisational activities	37.1%
5	Employees' expectations	33.0%

# Motivation for CSR activities in different organisations



# Motivation for CSR in different European regions



— Northern Europe — Western Europe — Southern Europe — Eastern Europe

## CSR communication tries to shape corporate profiles

Main focus of CSR activities		
1	Corporate profile (values and strategy)	60.8%
2	Environmental action	37.9%
3	Social action	37.7%
4	Employment and human resources	33.8%
5	Products and services	31.9%
6	Corporate governance (transparency)	27.1%

## Main focus of CSR communication in different regions

	Northern Europe	Western Europe	Southern Europe	Eastern Europe	Europe at large
Corporate profile	66.6%	58.9%	60.4%	56.8%	60.8%
Social action ✓	32.5%	35.0%	45.8%	50.0%	37.7%
Environmental action	39.3%	38.6%	38.2%	31.5%	37.9%
Employment and human resources	34.1%	35.3%	27.1%	36.3%	33.8%
Products and services	30.5%	32.7%	27.6%	39.0%	31.9%
Corporate governance	27.9%	28.6%	24.0%	23.3%	27.1%
Corporate ethics	27.3%	28.9%	21.8%	23.3%	27.0%
Economic action	18.8%	24.2%	28.0%	26.7%	23.9%
Relationships with stakeholders ✓	23.1%	17.7%	27.1%	13.0%	19.9%

# Interpretation

## **CSR – a dazzling concept with diverse motivation and focus**

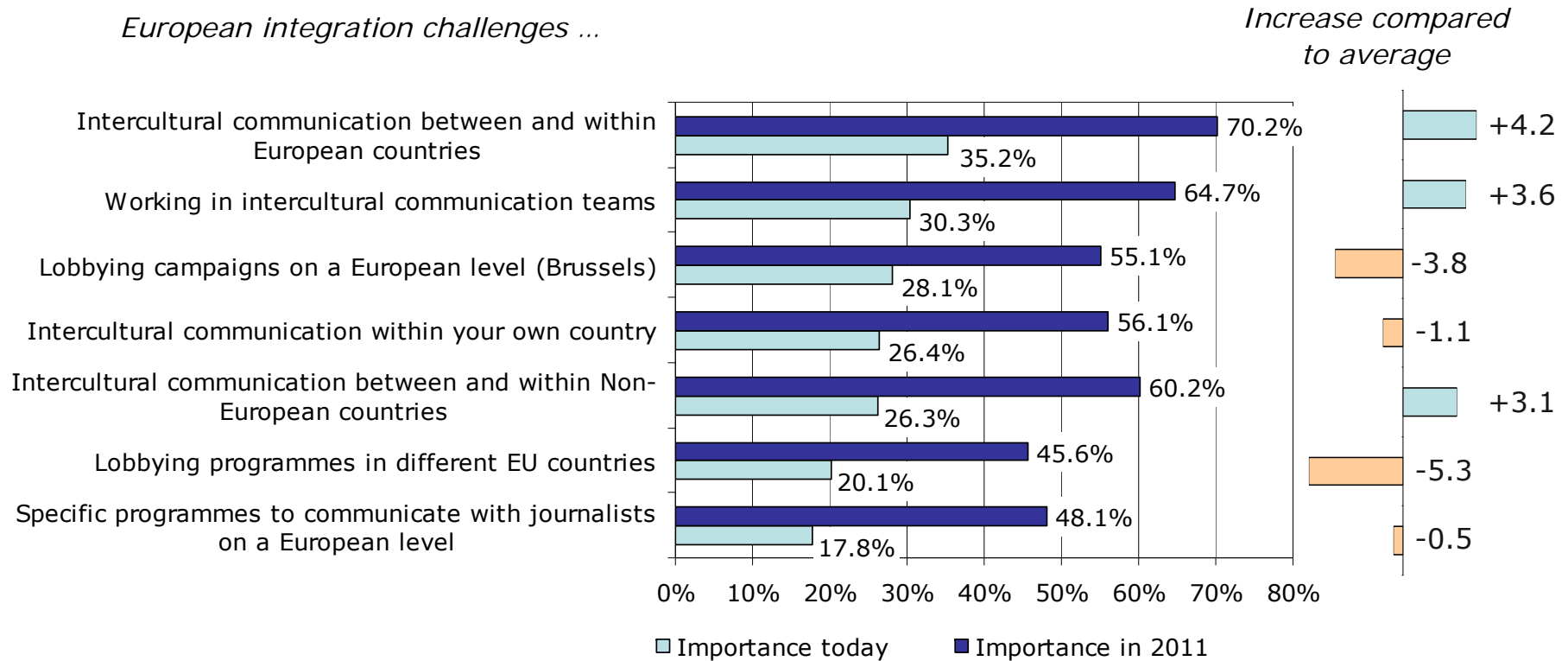
- \_ Corporate Social Responsibility is a most relevant, but ambiguous field of practice: 34.6% of the PR professionals in Europe consider it important today, while 72.8% think it will be important in three years. Moreover, four out of ten think it is a strategic issue that communication management should deal with.
- \_ CSR might boost the power of communication management within organisations. 44.8% of European PR professionals are in charge of CSR projects; even more in joint-stock companies (54.2%). This resembles the fact that reputation management is a key driver for CSR activities in all types of organisations and regions.
- \_ Along this line, the main focus of CSR communication is enhancing the corporate profile (values and strategies). However, other aspects vary sharply in different regions. Whereas social action is a main aspect in Eastern and Southern Europe, corporate ethics plays a decisive role in the West and the North. Communicating environmental action is valued less important in Eastern Europe.
- \_ This reflects the fact that CSR usually complements other societal systems and looks for bottlenecks. This allows organisations to take part in the public debate and bring in their capacities in a valuable way.

# European and intercultural challenges





# Intercultural communication across borders is the major topic stimulated by European integration



# Interpretation

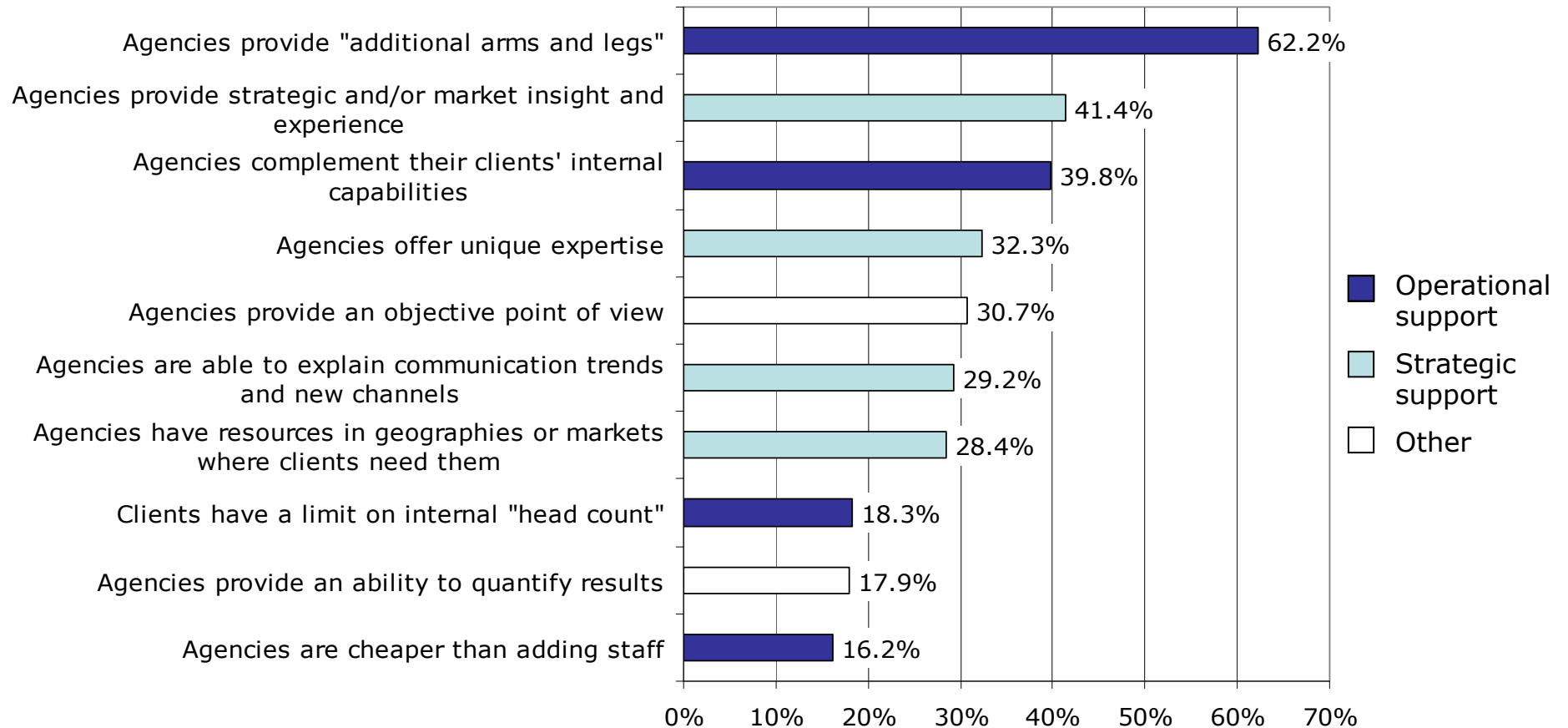
## **Rising demand for skills in intercultural communication**

- \_ European integration has a clear impact on public relations: PR professionals estimate an average increase of 30% in importance when asked about various issues influenced by the European integration nowadays compared to 2011.
- \_ Traditional activities like lobbying in Brussels, addressing journalists or communicating with other cultures in the own country are less relevant than intercultural communication in internal teams and between/within European or Non-European countries.
- \_ This opens up new windows of opportunity for communication professionals both in organisations and in agencies.

# Cooperation between organisations and PR agencies



# Why organisations work with public relations agencies and communication consultants

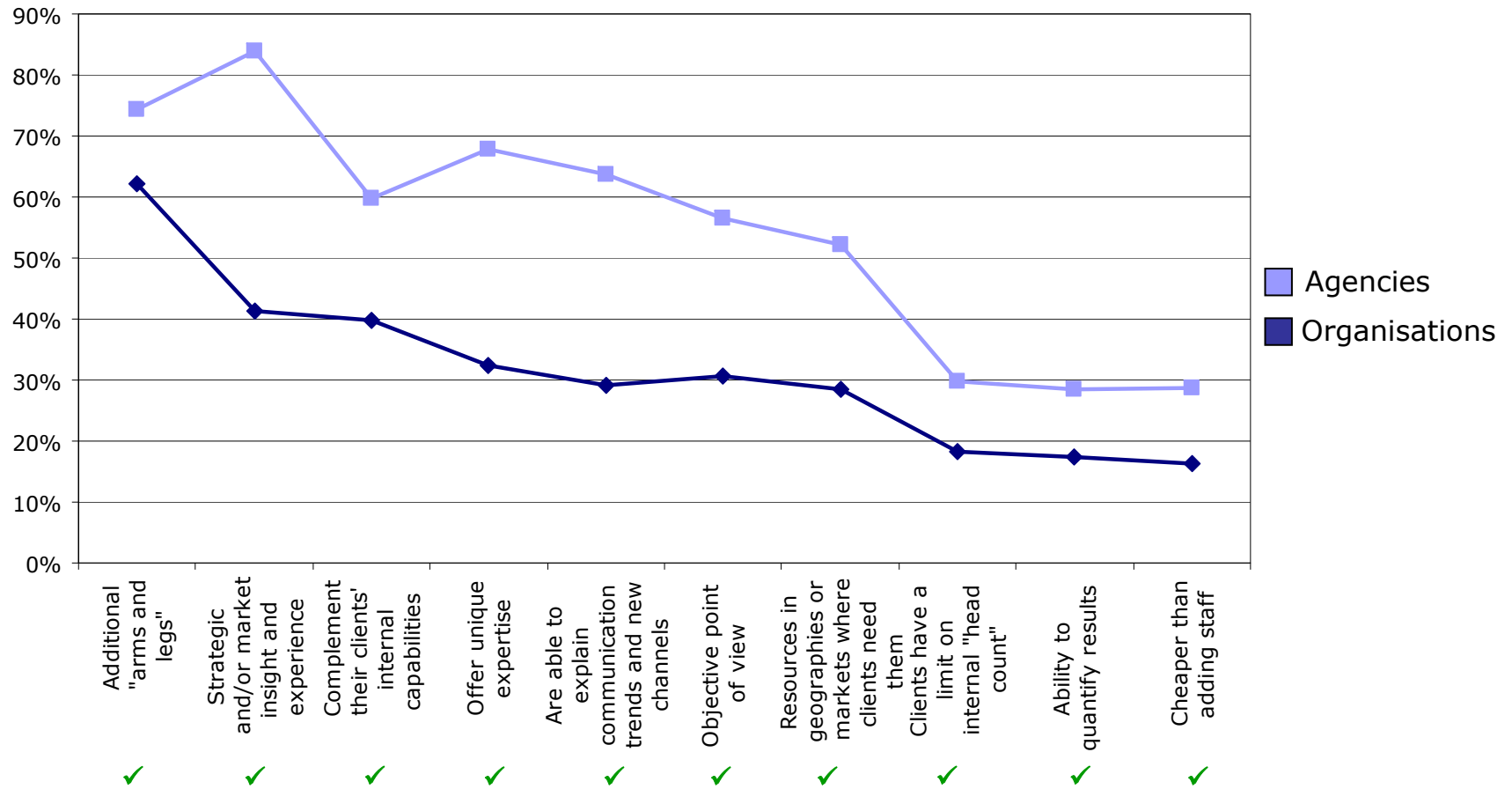


## PR agencies overestimate their strategic skills

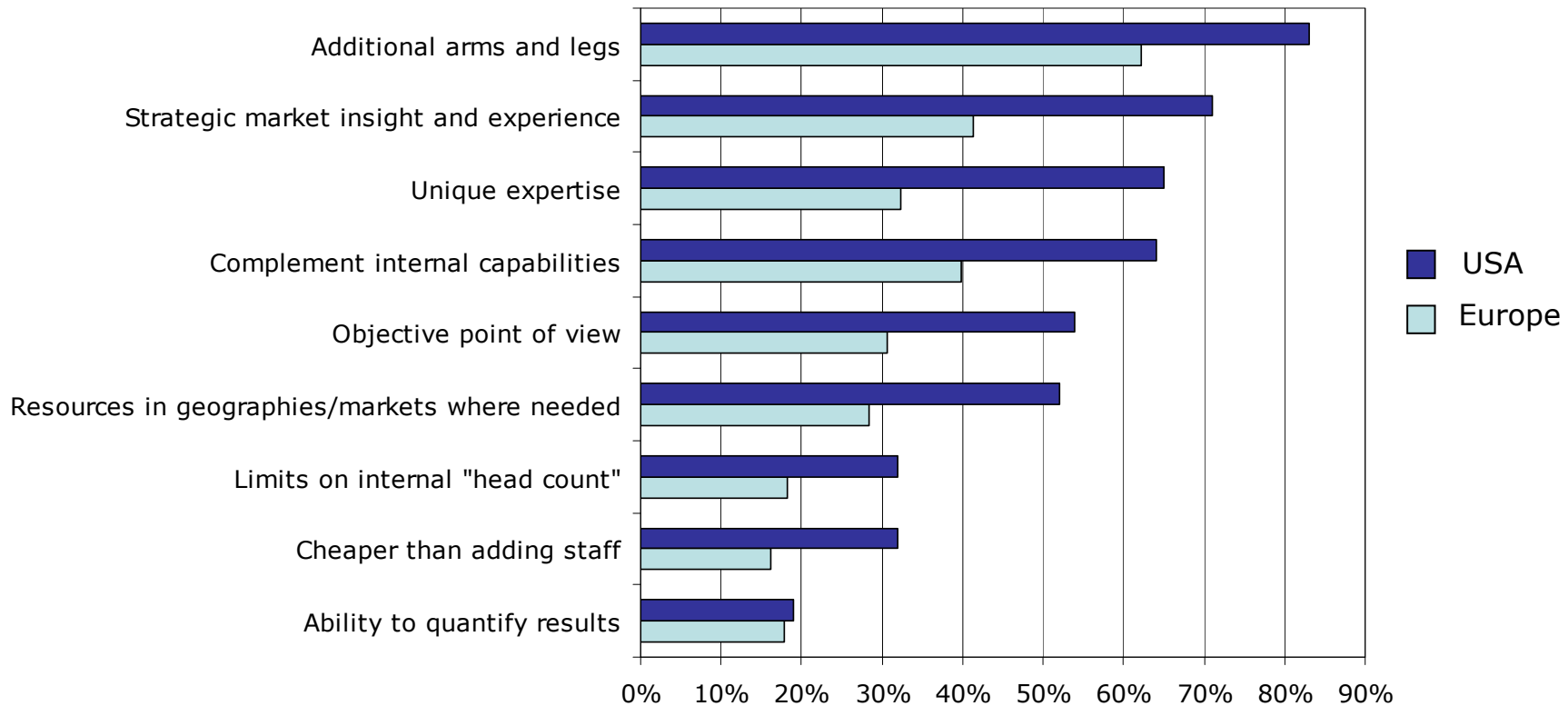
**83%** of the agencies think that they are engaged because of strategic and/or market insight and experience

but only **41.6%** of their clients do so

# Reasons for cooperation: different perceptions between PR agencies and their clients



# Clients in Europe are less dependent on agencies than in the US, both in terms of operations and strategies



# Interpretation

## **New challenges and opportunities for the agency industry**

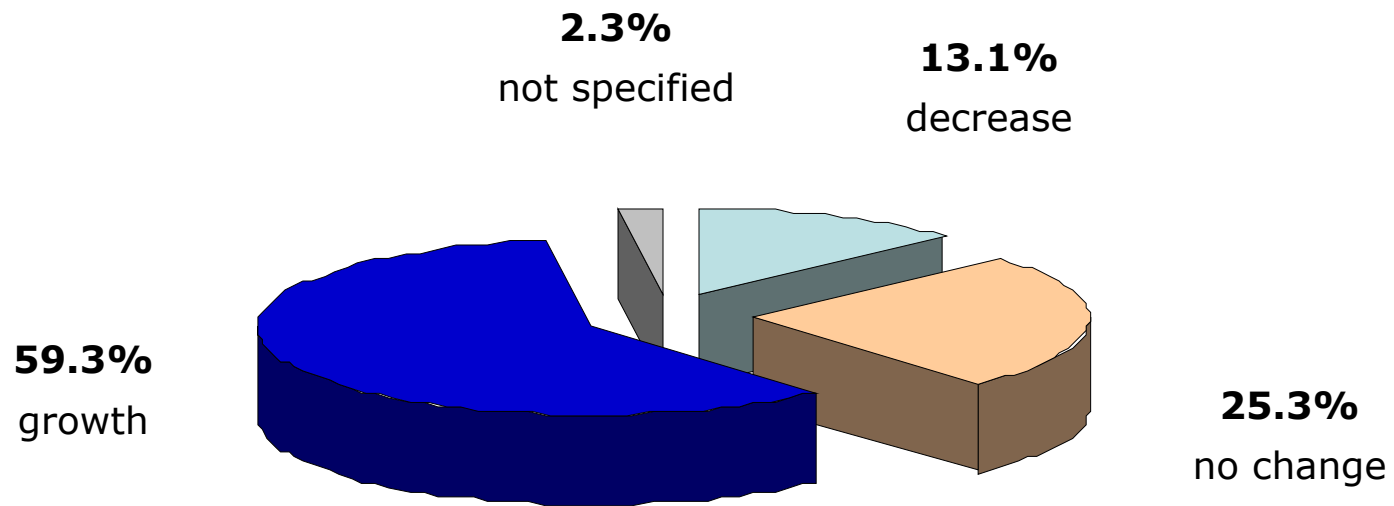
- \_ While the need for operational support (additional arms and legs, complementing internal capabilities) is still the main reason for hiring agencies, strategic aspects like market insight and unique expertise gain in importance.
- \_ However, European organisations are much more reluctant to outsource tasks than their counterparts in the United States.
- \_ Clients lack confidence in their consultants' skills when dealing with major issues like explaining communication trends and new channels or quantifying results. At the same time, agencies overestimate their capabilities in all fields of strategic support.
- \_ These findings correspondent with anecdotal evidence that agencies' investments in continuous education, applied research, and long term cooperation with academic research are still very low in Europe. Moreover, jobs in organisations are often better paid and may have a higher reputation than their counterparts in agencies. Initiatives on an internal, national or transnational level may change the situation.



## Next year's perspectives and resources

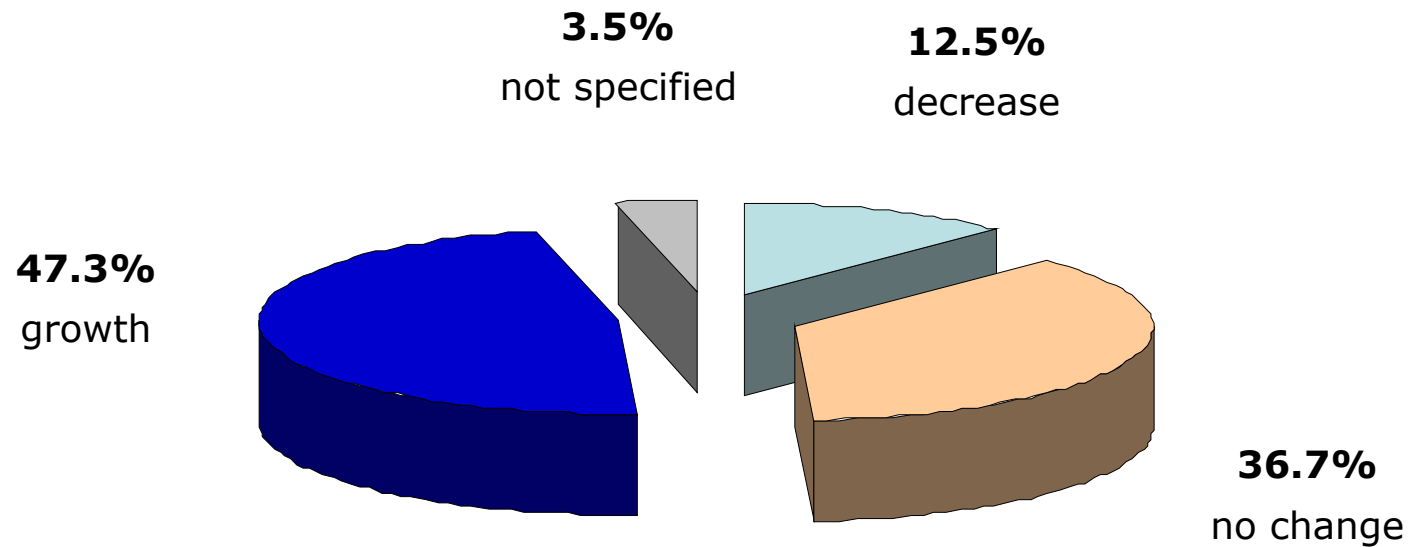


## Budgets for Public Relations in 2009



**Budget growth on average = +8.4%**

## Personnel resources for Public Relations in 2009



**Personnel growth on average = +7.1%**

# Interpretation

## **Positive outlook for 2009, but growth will be slower than before**

- \_ Nearly 60% of all communication managers in Europe expect increasing budgets for their departments or agencies in 2009, compared to 73% in last year's survey.
- \_ Almost every second (47%) professional expects to have new personnel in 2009. This is also a less optimistic forecast than last year (56%).
- \_ Overall, communication departments will continue to raise investments and human resources. The public relations industry will stimulate economic growth and create new jobs.

# Annex



# Countries and regions

## Respondents are based in 37 European countries

- \_ Austria, Belgium, Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Macedonia, Malta, Monaco, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, United Kingdom

## Regions (United Nations Standard Classification)

Northern Europe  
(n=339)

- \_ Denmark
- \_ Estonia
- \_ Finland
- \_ Iceland
- \_ Ireland
- \_ Latvia
- \_ Lithuania
- \_ Norway
- \_ Sweden
- \_ United Kingdom

Western Europe  
(n=767)

- \_ Austria
- \_ Belgium
- \_ France
- \_ Germany
- \_ Luxembourg
- \_ Monaco
- \_ Netherlands
- \_ Switzerland

Eastern Europe  
(n=167)

- \_ Bulgaria
- \_ Czech Republic
- \_ Hungary
- \_ Poland
- \_ Romania
- \_ Russia
- \_ Slovakia

Southern Europe  
(n=243)

- \_ Bosnia/Herzegovina
- \_ Croatia
- \_ Cyprus
- \_ Greece
- \_ Italy
- \_ Macedonia
- \_ Malta
- \_ Portugal
- \_ Serbia
- \_ Slovenia
- \_ Spain
- \_ Turkey

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