EUROPEAN COMMUNICATION MONITOR 2009

CHART VERSION

TRENDS IN COMMUNICATION MANAGEMENT AND PUBLIC RELATIONS

RESULTS OF A SURVEY IN 34 COUNTRIES

PARTNERS:

euprera

EUROPEAN ASSOCIATION OF COMMUNICATION DIRECTORS

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_ Suggested quotation for this document (APA style):

Zerfass, A., Moreno, A., Tench, R., Verčič, D., & Verhoeven, P. (2009): *European Communication Monitor 2009. Trends in Communication Management and Public Relations – Results of a Survey in 34 Countries (Chart Version).* Brussels: Euprera (available at: www.communicationmonitor.eu), September 2009

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

Source: European Communication Monitor 2009

Official report

_ The full report with text and charts has been published as a book by Helios Media:

Zerfass, A., Moreno, A., Tench, R., Verčič, D., & Verhoeven, P. (2009): *European Communication Monitor 2009. Trends in Communication Management and Public Relations – Results of a Survey in 34 Countries.* Brussels: EACD, Euprera; ISBN: 978-3-9811316-2-8

EUROPEAN COMMUNICATION MONITOR 2009

Overview

Key facts

European Communication Monitor 2009

_ Most comprehensive analysis of communication management and public relations in Europe up to now; more than 1,850 participating professionals from 34 countries

_ Annual research project conducted since 2007 by a group of professors from 11 renowned universities across Europe, led by Prof. Dr. Ansgar Zerfass, University of Leipzig

_ Organised by the European Public Relations Education and Research Association (EUPRERA)

_ Partners: European Association of Communication Directors (EACD), Communication Director Magazine; Sponsor: Cision

The research highlights:

_ Challenges for communication management in the recession and media crisis

_ Strategic issues, development of the discipline and communication instruments

_ Trends in internal communication, measurement/evaluation and interactive communication

_ Communication executives‘ roles and influence on management decisions

_ Salaries and qualification needs

Academic task force

Research team

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

Advisory board

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_ Valerie Carayol, Prof. Dr., University of Bordeaux (FR)
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_ Øyvind Ihlen, Prof. Dr., BI Norwegian School of Management, Oslo (NO)
_ Ryszard Lawniczak, Prof. Dr., Poznan University of Economics (PL)

Statistical analysis and organisational support

_ Stephanie Krahl, B.A. & Peter Schmiedgen, B.A., University of Leipzig (GE)

Partners

European Public Relations Education and Research Association (EUPRERA)

_ The European Public Relations Education and Research Association is an autonomous organisation that aims at stimulating and promoting innovative knowledge and practices of public relations education and research in Europe. Its membership comprises the leading universities and scholars in communication management as well as practitioners interested in academic research from more than 30 countries.

_ www.euprera.org

European Communication Directors (EACD)

_ The European Association of Communication Directors is the leading network for communication professionals from all fields across Europe with over 1,000 members. The non-partisan Association lobbies for the profession, establishes common quality standards and promotes the advancement of professional qualification by organising events and providing services and material.

_ www.eacd-online.eu

Communication Director Magazine (Partner)

_ Communication Director is a quarterly magazine dedicated to European Corporate Communications and Public Relations. It explores contemporary communications strategies, discusses European trends, examines and analyses different case studies and discusses the relevance of global communication strategies from a European perspective. The magazine is published by Helios Media, a specialist publishing house based in Berlin and Brussels.

_ www.communication-director.eu

Cision (Sponsor)

_ Cision delivers relevant media information, targeted distribution, media monitoring, and precise analyses. Working across cultures and borders, the company serves leading multinational companies and fast-growing enterprises of all sizes. It is a force that drives its clients business forward through the ability to make better decisions based on superior media intelligence. Cision is working for nearly 30,000 clients around the world, has offices in Europe, North America and Asia, and partners in another 125 countries.

_ www.cision.com

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Research design and socio-demographic analysis

Outline of the survey

Aims and focus

_ to monitor trends in communication management

_ to analyze the changing framework for the profession in Europe

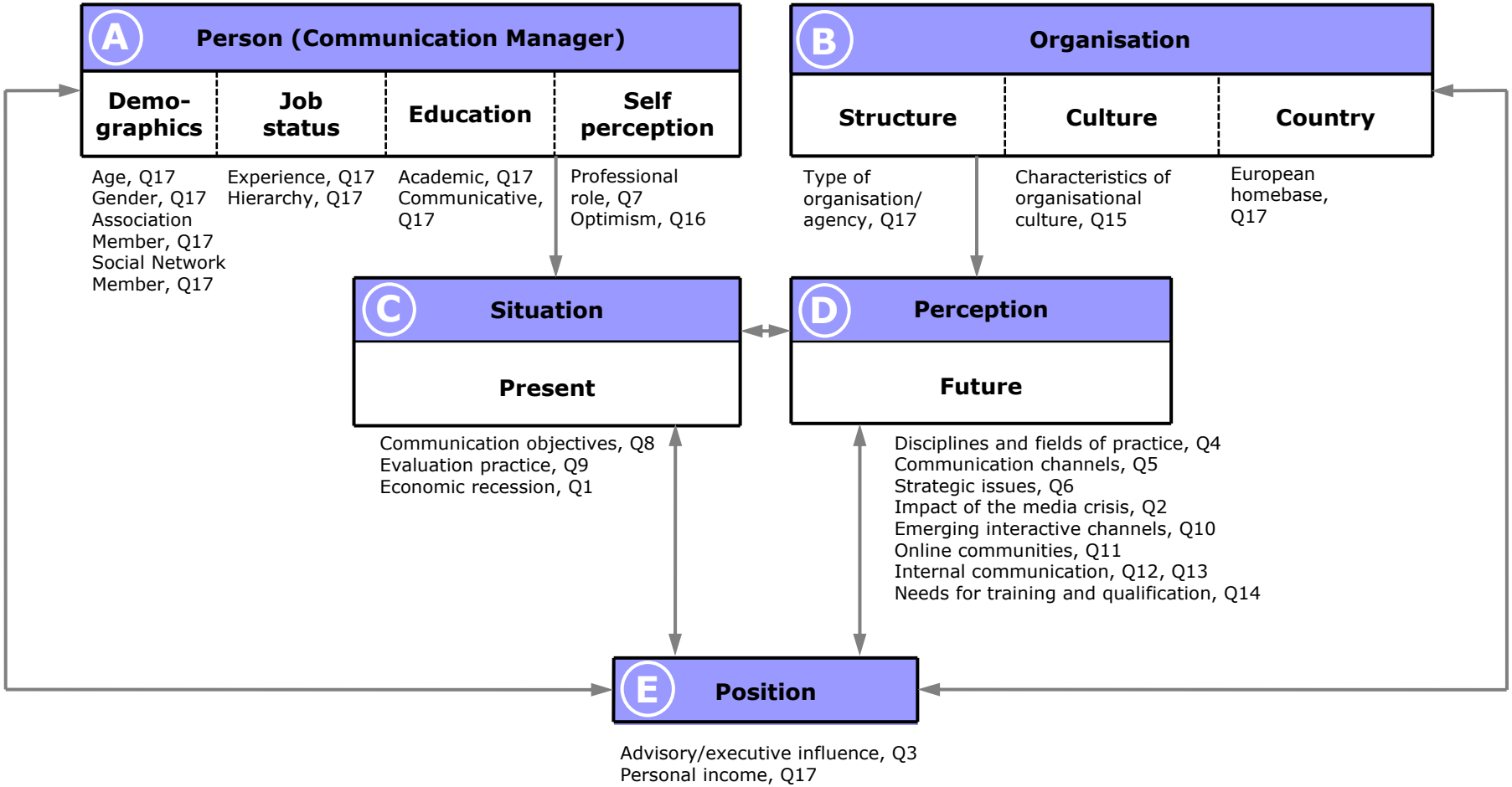
_ to evaluate specific topics like internal communication and measurement/evaluation, interactive channels and online communities, influence on management decisions, strategic issues, communications disciplines, salaries and training and qualification requirements

_ to identify the development of communication management in different types of organisations, countries and regions

Target group

_ Communication executives and PR professionals working in organisations and consultancies throughout Europe

Research framework and questions



Methodology

Survey method and sampling

_ online survey in May 2009 (4 weeks), English language

_ questionnaire with 17 sections; design based on hypotheses and instruments derived from previous research and literature; pre-test with 50 practitioners in 10 European countries

_ personal invitation to 20,000+ professionals throughout Europe via e-mail based on a database provided by EACD; additional invitations to participate via national branch associations and networks (partly self-recruiting); 2,846 respondents and 1,975 fully completed replies

_ 1,863 fully completed replies by participants identified as part of the population (communication professionals in Europe) were evaluated

Analysis

_ methods of empirical research, descriptive and analytical (using SPSS tools)

Demographic background of participants (1,863 communication professionals from 34 European countries)

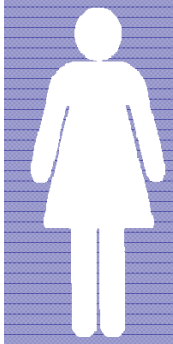
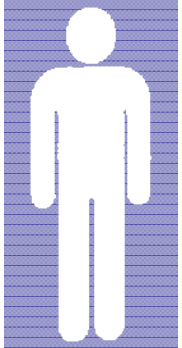
Position	
Head of communication, Agency CEO	**53.8%**
Responsible for single communication discipline, Unit leader	29.8%
Team member, Consultant	12.7%
Other	3.7%

Organisation		
Communication department, Press office		**72.2%**
- Joint stock company	29.7%	
- Private company	18.4%	
- Government-owned/Political org.	12.7%	
- Non profit org./Association	11.5%	
Communication consultancy, PR Agency, Freelance Consultant		**27.8%**

Job experience	
Up to 5 years	14.8%
6 to 10 years	26,9%
More than 10 years	**58.3%**

Gender / Age	
Female	50.7%
Male	49.3%
Age (on average)	**41.7 yrs**

Gender: Within the whole sample, women and men are equally divided – but higher positions are still male-dominated

Position				
Female	**50.7%**	**All respondents**	**49.3%**	**Male**
	45.8%	Head of communication, Agency CEO	54.2%	
	55.2%	Responsible for a single communication discipline / Unit leader	44.8%	
	58.1%	Team member, Consultant	41.9%	

Geographical distribution and affiliation

Full sample

_ 1,863 professionals working in communication management / PR

Geographical distribution

_ participants from 34 European states

_ Northern Europe (e.g. Norway, United Kingdom, Latvia)	31.1%
_ Western Europe (e.g. Germany, Netherlands, France)	41.4%
_ Southern Europe (e.g. Italy, Slovenia, Croatia)	19.0%
_ Eastern Europe (e.g. Poland, Czech Republic, Bulgaria)	8.5%

Membership in a professional organisation

_ EACD	12.7%
_ Other international communication association	16.2%
_ National PR or communication association	55.4%

www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR professionals from 34 European countries; Q 17
Regions are classified according to United Nations Standards; see page 90 for a detailed list of countries

Personal background: knowledge and education

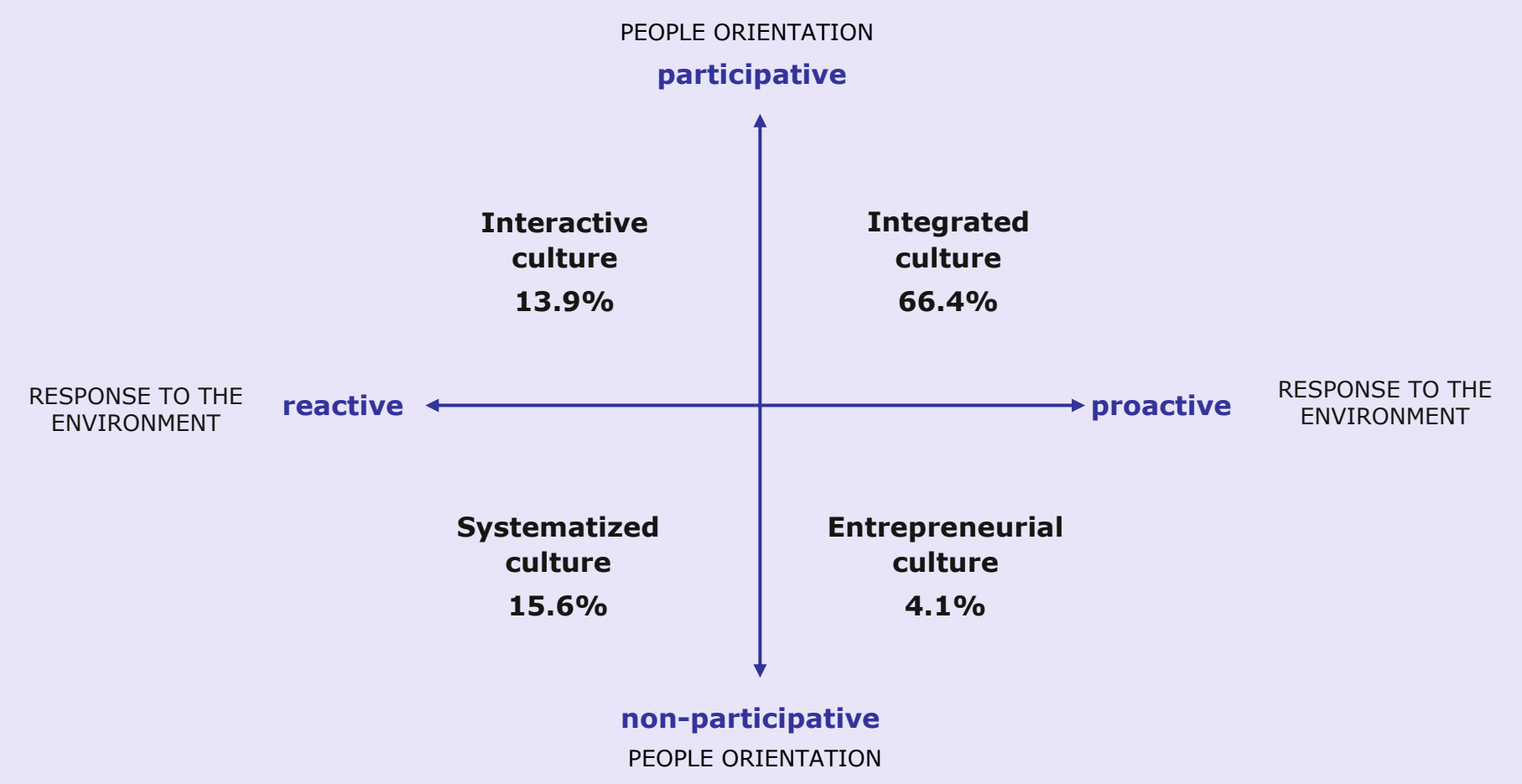
Communication qualifications

_ Academic degree in communication (Bachelor, Master, Doctorate)	41.4%
_ Professional certificate in public relations / communication management	26.4%
_ Professional certificate in other communication discipline	17.3%

Highest academic educational qualification

_ Doctorate (Ph.D., Dr.)	7.4%
_ Master (M.A., M.Sc., Mag., M.B.A.), Diploma	60.2%
_ Bachelor (B.A.)	25.1%
_ No academic degree	7.4%

Organisational cultures: Most participants work in people-oriented and responsive environments



www.communicationmonitor.eu / Zerfass et al. 2009 / n = 782 PR Professionals;
Q 15: How would you perceive your organisation regarding the following dimensions? participative/non participative, proactive/reactive; considered scale points 1-2 and 4-5; scale derived from Ernest (1985)

Types of culture in different types of organisation

	Joint stock companies	Private companies	Governmental organisations	Non profit organisations
Integrated culture (participative – proactive)	64.5%	67.8%	58.8%	76.4%
Interactive culture (participative – reactive)	11.5%	10.4%	24.4%	15.0%
Entrepreneurial culture (non-participative – proactive)	4.5%	4.7%	3.1%	3.1%
Systematized culture (non-participative – reactive)	19.5%	17.1%	13.7%	5.5%

www.communicationmonitor.eu / Zerfass et al. 2009 / n = 782 PR Professionals;
Q 15: How would you perceive your organisation regarding the following dimensions? participative/non participative, proactive/reactive; considered scale points 1-2 and 4-5; scale derived from Ernest (1985)

Interpretation

Valuable insights into the evolution of strategic communication in Europe

_ Based on a sample of more than 1,850 professionals from 34 European countries, this research is one of the most comprehensive transnational studies ever conducted in the field of public relations wordwide.

_ With respondents characterised by a high level of experience (average age 42 years, almost 60% have more than 10 years of experience in the field), the survey lays a solid ground for identifying major developments in strategic communication.

_ 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 is especially useful to identify relevant patterns and trends in the field, which may stimulate qualitative discussions.

_ The analysis is based on thorough empirical research and analysis. For example replies from participants not currently working in communication management (academics, students) and from non-European countries have been removed. Only fully completed questionnaires have been taken into account.

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Professional roles and contribution to organisational objectives

Strategic orientation: A clear majority execute communication based on business strategies, but only 6 out of 10 try to define them

84.8%

focus on supporting business goals by planning and executing communication

60.7%

feel responsible for helping to define business strategies

www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries; Q 7: In your daily work, how much do you focus on supporting business goals by planning and executing communication? (1 = not at all; 7 = very much) / … how much do you feel responsible for helping to define business strategies? (1 = never; 7 = always); considered scale points 5-7

Role-taking: PR professionals enact different roles – this shapes and reflects their relationship with business strategies

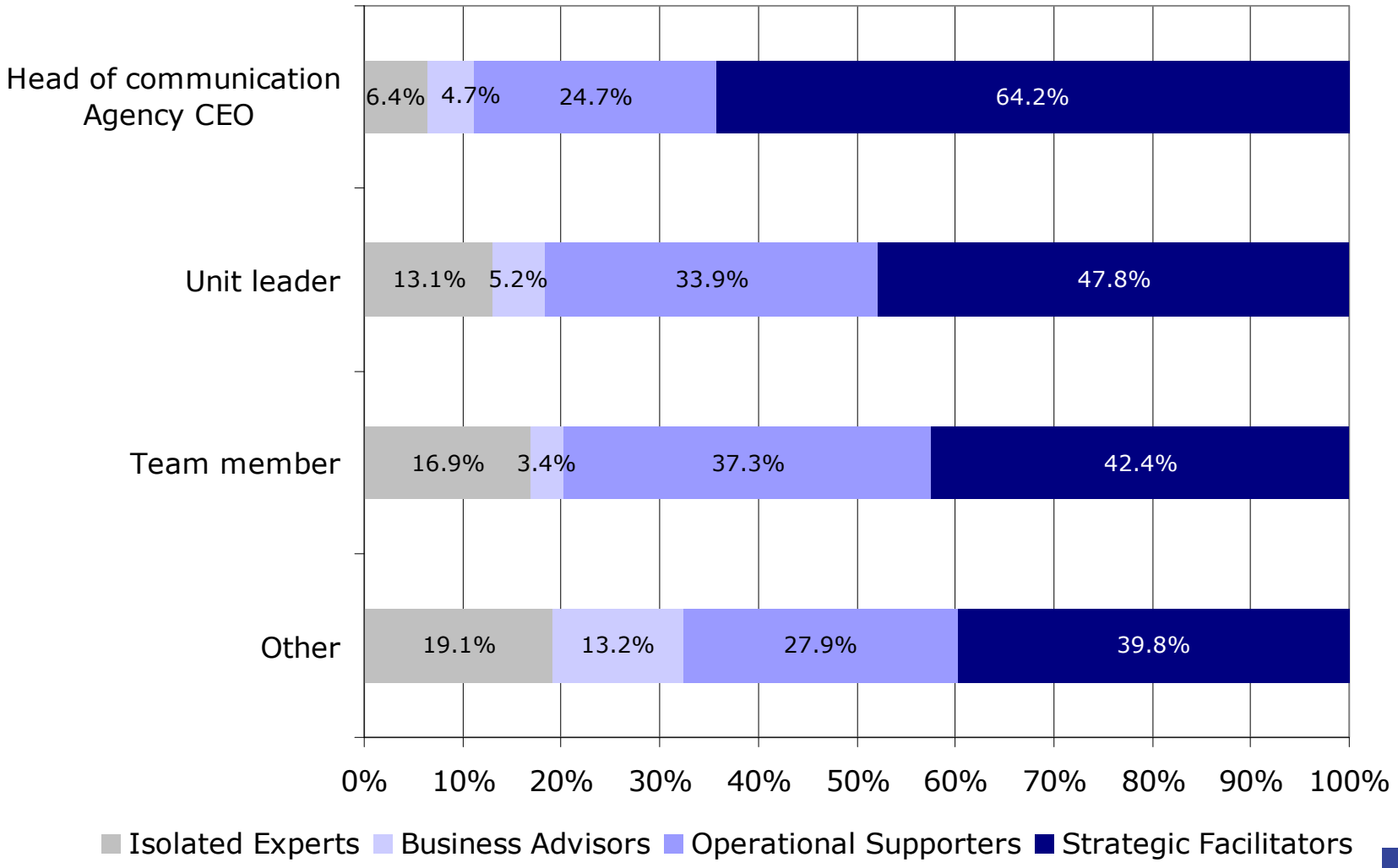
www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries;
Q 7: In your daily work, how much do you focus on supporting business goals by planning and executing communication? (1 = not at all; 7 = very much) / … how much do you feel responsible for helping to define business strategies? (1 = never; 7 = always)

Strategic facilitators concentrate on listening and reflecting, as well as on dissemination, to contribute to organisational objectives

	Strategic Facilitators	Operational Supporters	Business Advisors	Isolated Experts
Help top management to adjust the organisation to demands from stakeholders and society	**63.2%**	36.8%	43.0%	24.2%
Educate members of the organisation to behave more communicatively	**59.0%**	44.8%	54.8%	30.5%
Listen systematically to voices outside of the organisation	**68.9%**	53.4%	53.8%	44.2%
Inform stakeholders about the opinions of the organisation	**62.6%**	58.2%	36.6%	38.9%
Develop communication plans that support the strategy of the organisation	**84.8%**	76.6%	61.3%	48.9%
Shape the public image of the organisation	**83.0%**	78.3%	67.7%	64.2%

www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries; Q 7, Q 8

64% of top level communicators are strategic facilitators, but 6% are not linked to business strategies in any way



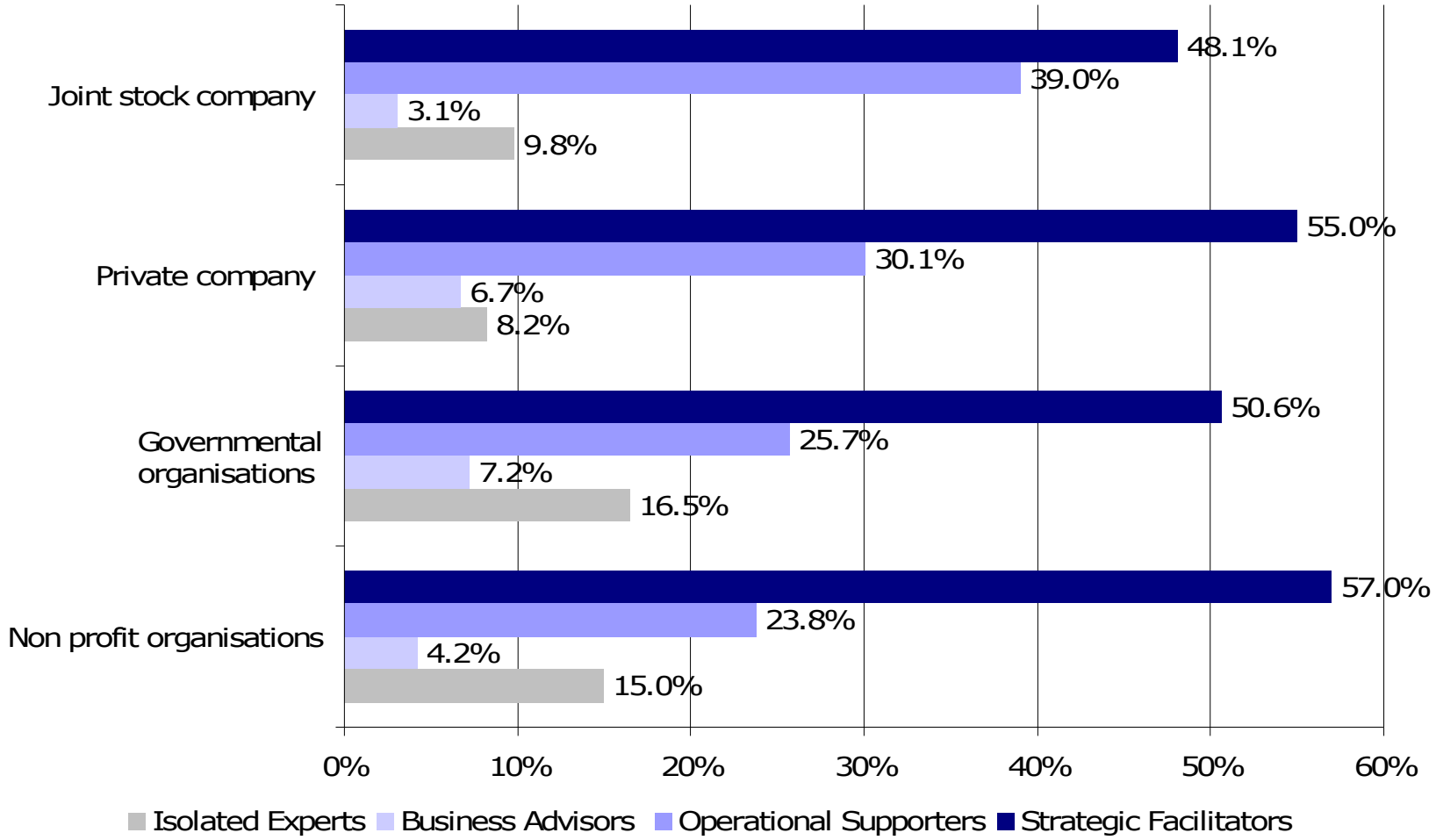
www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 countries; Q 7; Q 17

Strategic facilitators are more optimistic than any other role when thinking about the future of their function or agency

	Strategic Facilitators	Operational Supporters	Business Advisors	Isolated Experts
Optimistic for 2010	87.3%	82.5%	82.8%	75.8%
Pessimistic for 2010	12.7%	17.5%	17.2%	24.2%

www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries; Q 7; Q 16: Thinking of the communication function within your organisation or of your consultancy, are you optimistic or pessimistic for the next year?

Private companies show a strong combination of role sets



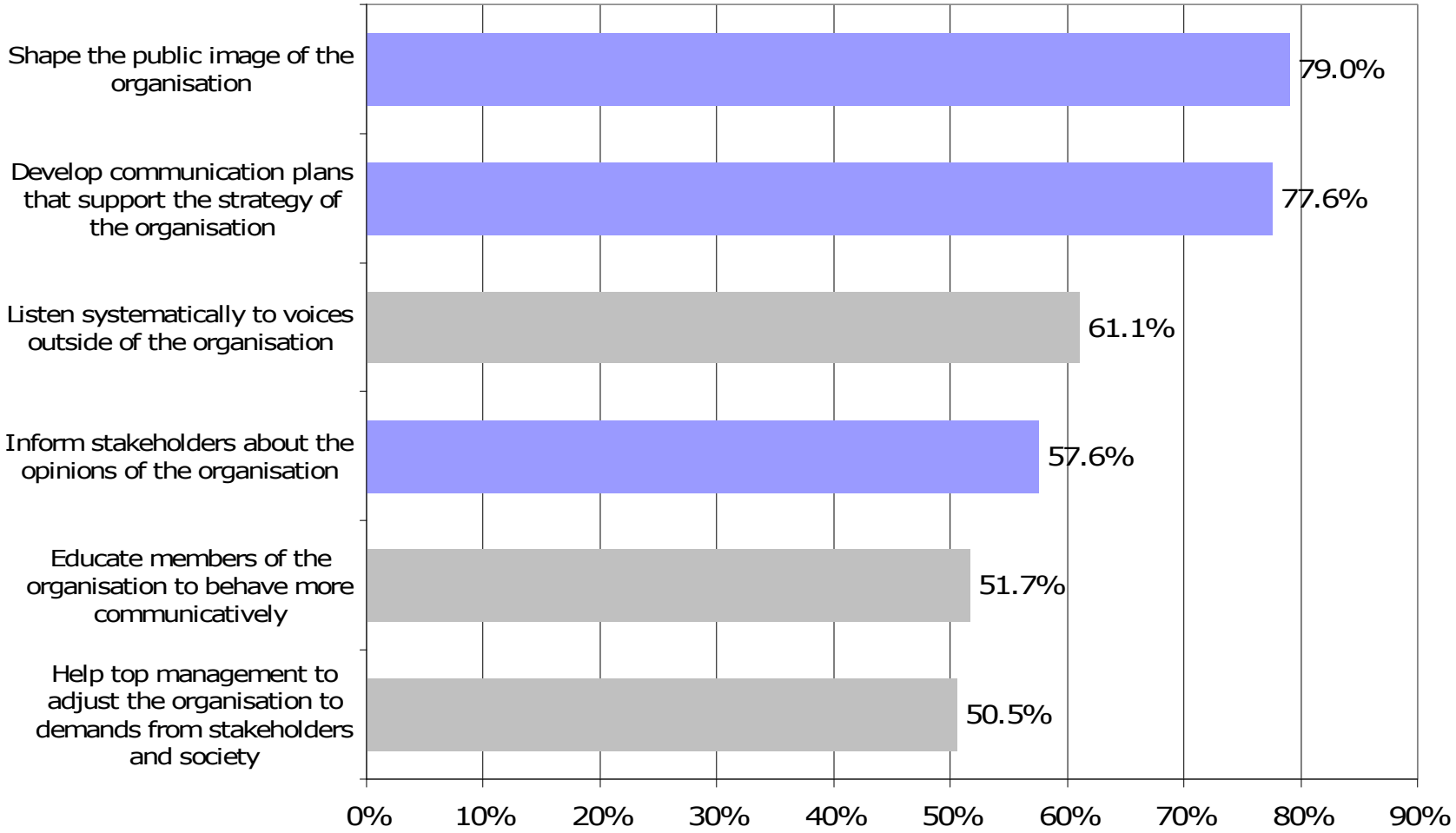
www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,346 PR Professionals in communication departments; Q7

Distribution of professional roles in European regions

	Northern Europe	Western Europe	Southern Europe	Eastern Europe
Strategic Facilitators	57.5%	55.2%	54.5%	53.8%
Operational Supporters	29.7%	29.9%	25.7%	31.0%
Business Advisors	3.6%	4.3%	8.5%	5.7%
Isolated Experts	9.2%	10.6%	11.3%	9.5%

www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals; Q 7

Overall, practitioners in Europe still rely on outbound activities to reach organisational goals – speaking dominates listening



www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries;
Q 8: How do you and your department/agency help to reach overall goals of (internal) clients and the organisation at large? (1 = rarely; 5 = very often; considered scale points 4 and 5)

Interpretation

Many practitioners do not exploit the full potential of strategic communication

_ The survey empirically proves insights from theory (Van Ruler & Vercic, 2002, 2005; Lurati & Eppler 2006; Zerfass 2008) that PR professionals can foster business goals basically in two distinct ways: a) by solving problems deriving from business or functional strategies that can (probably) be solved by communication activities, i.e. selling goods by marketing communication, motivating employees through internal communication etc.; b) by helping to define organisational objectives by adding the communicative dimension to strategy formulation, i.e. by reporting results from issues management and stakeholder research, by managing reputation risks etc. This combines either with dissemination or with listening and reflecting activities.

_ Overall, a 85% majority of practitioners in Europe focus on supporting organisational goals by addressing stakeholders; only 61% feel responsible for shaping the strategy.

_ 56% declare that they use both ways to contribute to overall goals, thus enacting the "strategic facilitator" role. This auspicious role is prevalent among heads of communication; in private companies; in NGOs; as well as in Northern Europe. Another 30% are "operational supporters" concentrating on addressing stakeholders, whereas a minority of 5% primarily sees themselves as "business advisers" helping to adjust organisational strategies. A surprising number (10%) of respondents are "isolated experts" who do not seem to believe in a clear link between what they are doing and what their organisation wants to achieve.

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Public relations and management decisions

Influence and status of the profession: PR practitioners are trusted advisors, but only two-thirds are involved in management decision

73.0% are taken seriously by senior management.

64.4% are involved in decision making and planning.

Appraisal of the profession has risen slightly (+2% since 2008),
yet executive influence is still as low as the year before (+0.4%).

www.communicationmonitor.eu / Zerfass et al. 2009 / n^{max} = 1,267 PR Professionals in communication departments;
Q 3: In your organisation, how seriously are PR recommendations taken by senior management? (1-7); To what extent are PR and reputational considerations factored into strategic decision making and planning in your organisation? (1-7); considered scale points 5-7

Professionals in private and non profit organisations report a rise of influence since 2008, though US practitioners are still ahead

	Europe (2009)					USA (2007)
	Joint stock companies	Private companies	Governmental organisations	Non profit organisations	Total	
Advisory influence PR recommendations taken seriously by senior management	5.21 ↘	5.07	5.04	5.13	**5.13**	**5.67**
Executive influence PR involved in decision making	4.84 ↘	4.73 ↗	4.75	4.97 ↗	**4.82**	**5.33**
Status discrepancy (difference between advisory & executive)	-0.37	-0.34	-0.29	-0.16	**-0.31** ↗	**-0.34**

www.communicationmonitor.eu / Zerfass et al. 2009 / n^{max} = 1,267 PR Professionals in communication departments, Q 3; Zerfass et al. 2008 / n = 1,027; Q 1; USA: Swerling et al. 2008 / n = 518, Q 8, Q 10 (scale 1-7; average results). Arrow symbols indicate changes compared to ECM 2008 results.

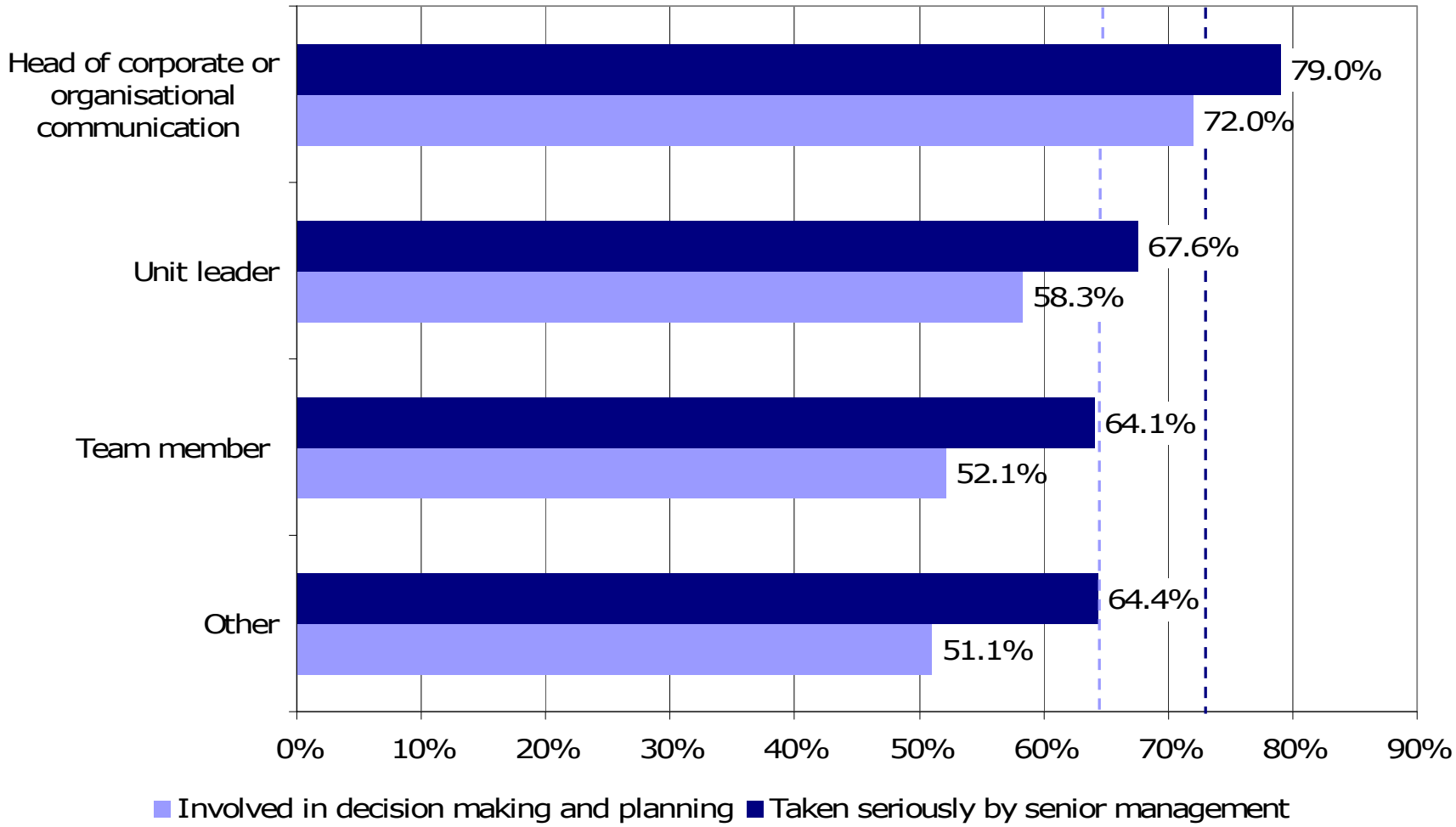
On average, professionals acting as strategic facilitators and those working in Northern Europe are more influential

	Strategic Facilitators	Operational Supporters	Business Advisors	Isolated Experts
Advisory influence	83.5%	68.6%	52.5%	46.9%
Executive influence	79.0%	52.8%	57.4%	34.7%

	Northern Europe	Western Europe	Southern Europe	Eastern Europe
Advisory influence	76.4%	74.6%	63.0%	67.8%
Executive influence	68.9%	63.4%	59.3%	60.9%

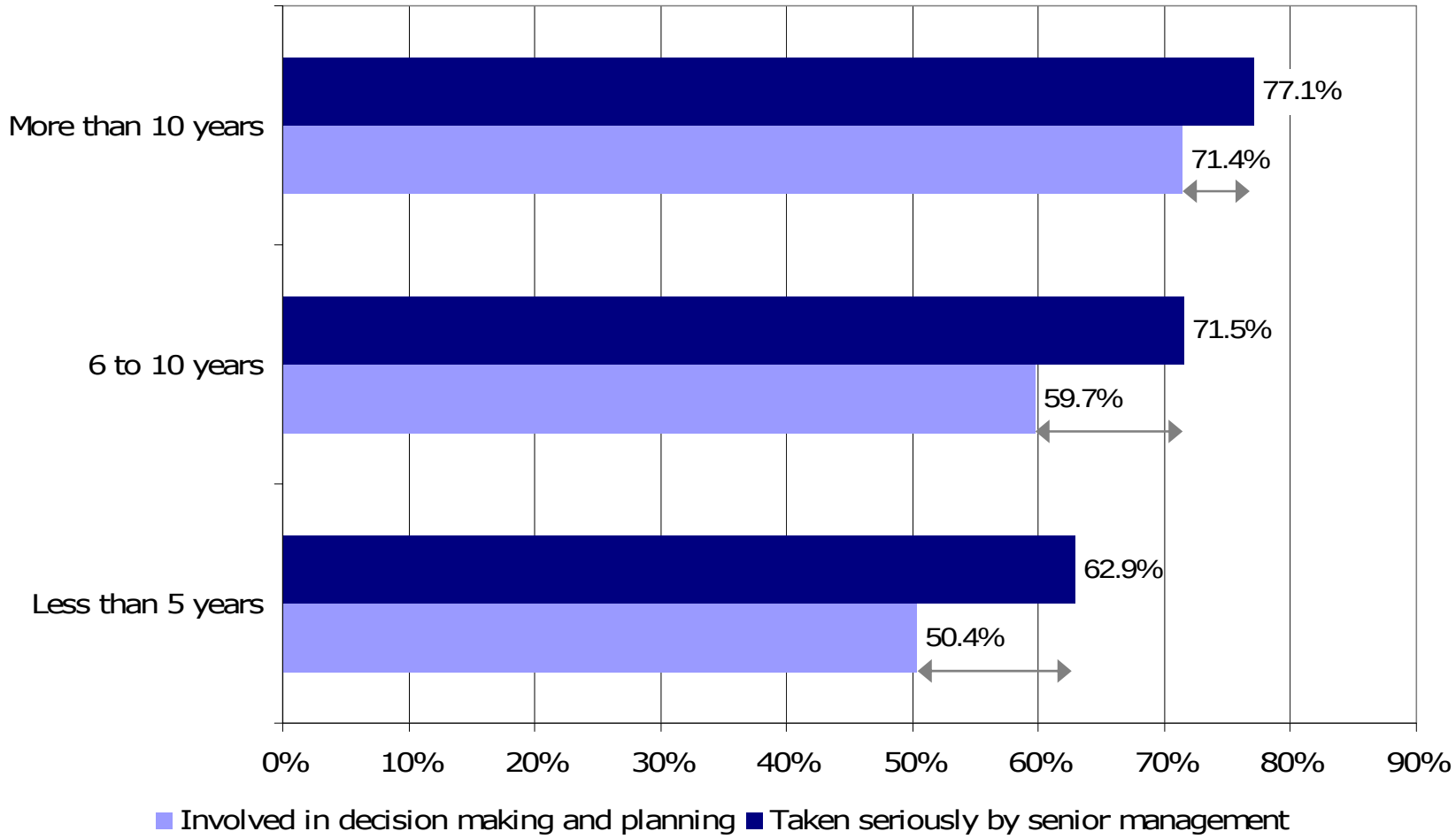
www.communicationmonitor.eu / Zerfass et al. 2009 / n^{max} = 1,267 PR Professionals in communication departments; Q 3; Q 16; Q 17

Influence correlates significantly with the hierarchical position



www.communicationmonitor.eu / Zerfass et al. 2009 / n^{max} = 1,267 PR Professionals in communication departments;
Q 3: In your organisation, how seriously are PR recommendations taken by senior management? (1-7); To what extent are PR and reputational considerations factored into strategic decision making and planning in your organisation? (1-7); considered scale points 5-7.

With more years of experience in the field, the gap between advisory influence and executive influence becomes smaller



www.communicationmonitor.eu / Zerfass et al. 2009 / n^{max} = 1,267 PR Professionals in communication departments;
Q 3: In your organisation, how seriously are PR recommendations taken by senior management? (1-7); To what extent are PR and reputational considerations factored into strategic decision making and planning in your organisation? (1-7); considered scale points 5-7.

Interpretation

Influence depends on role-taking, hierarchical position and years of practice

_ All over Europe, PR professionals are trusted advisors, with 73% reporting that their recommendations are taken seriously by senior management. This is a small 2% increase within the last 12 months. However, still only 64% say that their considerations are factored into strategic decision making and planning processes. In both dimensions European professionals fall behind their counterparts in the United States.

_ Communication executives enacting the "strategic facilitator" role are significantly more influential than the average. A majority of those working as "isolated experts" are not taken seriously and only one third of this group reports executive influence. This underlines the coherence of the roles empirically identified by this research.

_ In general, statistical analysis shows that influence depends on the geographical location of the organisation as well as on practitioners' experience and position, but not on their age and professional or academic education. Moreover, practitioners with a solid track record in the field report a smaller status discrepancy – they are not only able to catch the eye of senior management, but also to affect business decisions.

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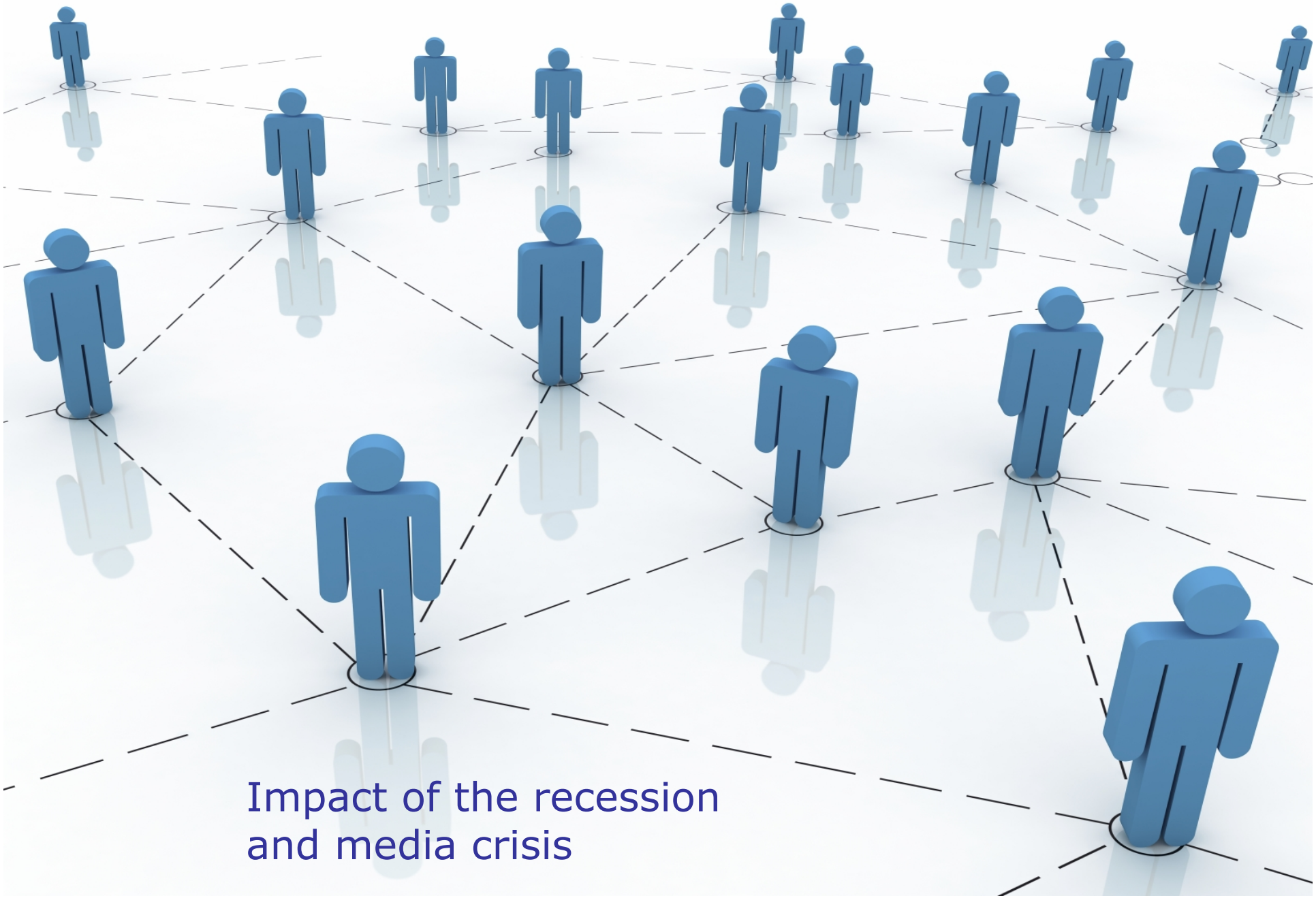
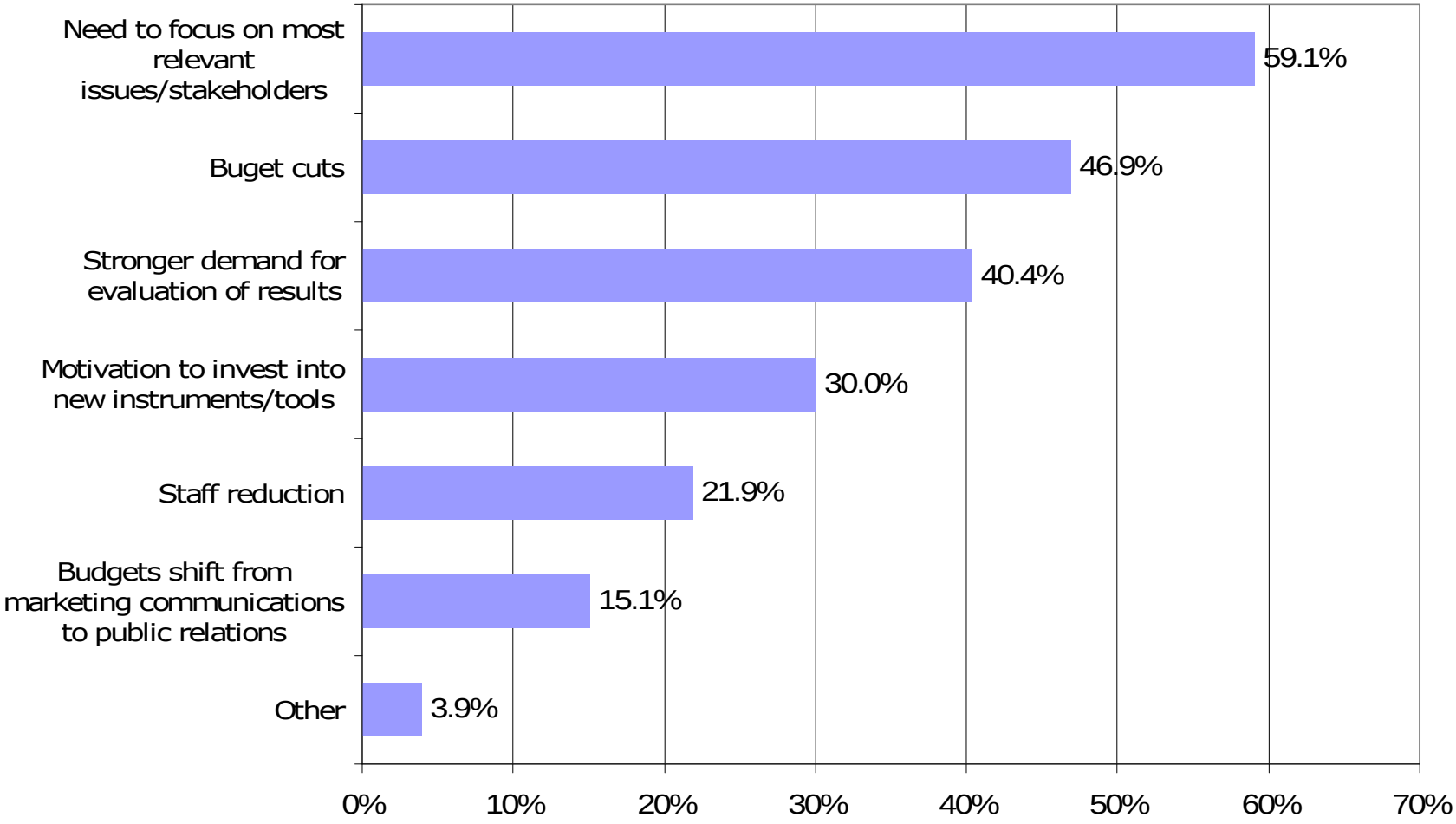


Impact of the recession and media crisis

How the global downturn influences PR practice in Europe

www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries;
Q 1: How has the global downturn influenced your daily work? (open question)

PR practitioners face serious budget cuts; focusing activities and evaluating results becomes more important



www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries;
Q 1: How has the global downturn influenced your daily work? (1 = not at all; 5 = significantly); considered scale points 4-5

Impact of the recession in different European regions

	Northern Europe	Western Europe	Southern Europe	Eastern Europe
Budget cuts	41.8%	45.2%	57.9%	48.7%
Staff reduction	22.6%	22.0%	22.6%	17.1%
Budgets shift from marketing communications to PR	16.9%	11.7%	18.9%	15.8%
Stronger demand for evaluation of results	34.7%	35.4%	56.5%	49.4%
Need to focus on most relevant issues/stakeholders	52.8%	58.9%	67.5%	63.3%
Motivation to invest into new instruments/tools	23.8%	28.1%	41.5%	35.4%

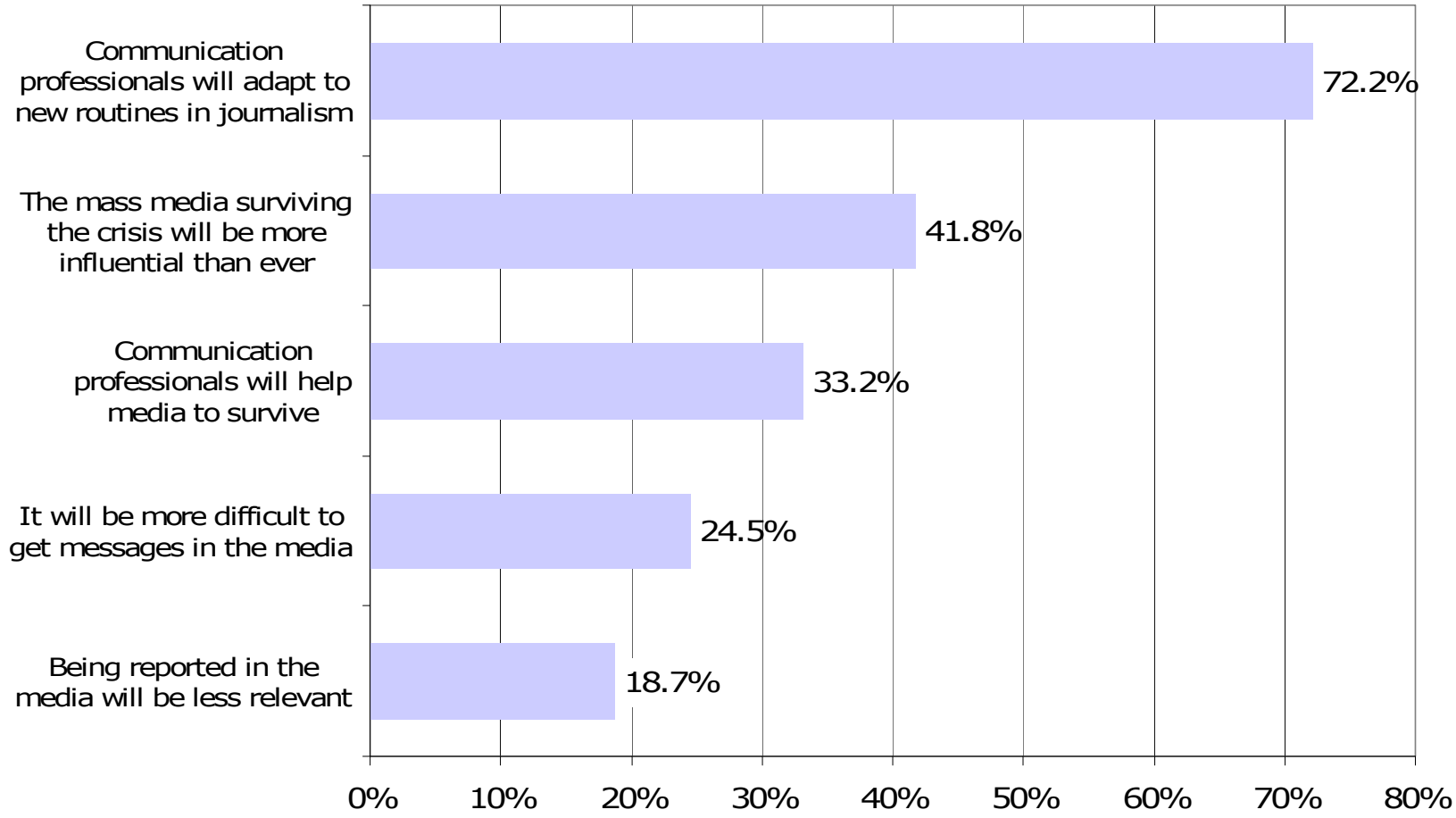
www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries;
Q 1: How has the global downturn influenced your daily work? (1 = not at all; 5 = significantly; considered scale points 4-5

Impact of the recession in different organisations

	Joint stock companies	Private companies	Governmental organisations	Non profit organisations
Budget cuts	57.1%	50.6%	29.1%	35.0%
Staff reduction	27.8%	26.3%	13.1%	14.0%
Budgets shift from marketing communications to PR	13.6%	17.3%	11.8%	11.2%
Stronger demand for evaluation of results	41.0%	46.2%	30.4%	38.8%
Need to focus on most relevant issues/stakeholders	65.5%	63.7%	39.2%	61.7%
Motivation to invest into new instruments/tools	28.2%	31.0%	27.0%	31.8%

www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries;
Q 1: How has the global downturn influenced your daily work? (1 = not at all; 5 = significantly); considered scale points 4-5

PR professionals face the media crisis and try to adapt – believe in the power of journalism and the mass media is still strong



www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries; Q 2: Publishers and broadcasters face serious difficulties: While commercial revenues are declining due to recession, audiences are switching to internet news and online communities. What does this mean for comm. management? (1=strongly disagree; 5=strongly agree); agreement = scale points 4-5

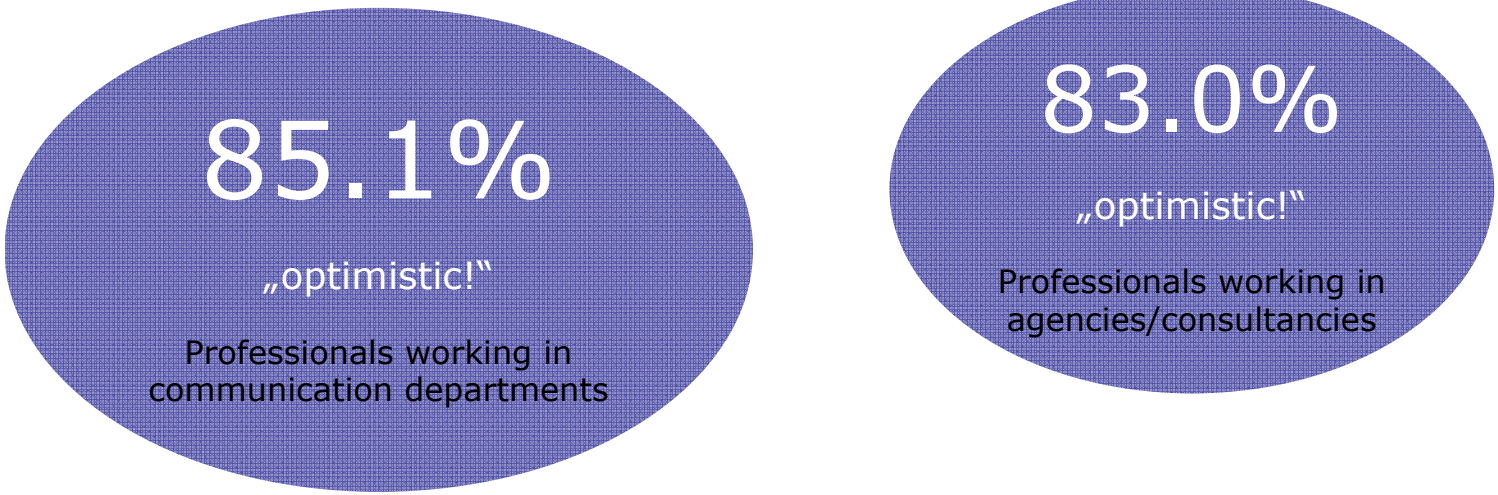
PR professionals working in participative, people-oriented cultures are more willing to adapt to the new rules of the game

	Integrated organisational culture	Interactive organisational culture	Entrepreneurial organisational culture	Systematized organisational culture
Communication professionals will adapt to new routines in journalism (i.e. crossmedia newsrooms)	74.8%	78.0%	68.8%	67.2%
Communication professionals will help media to survive (i.e. through free content)	36.3%	43.1%	46.9%	35.3%

www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries; Q 2: Publishers and broadcasters face serious difficulties: While commercial revenues are declining due to recession, audiences are switching to internet news and online communities. What does this mean for comm. management? (1=strongly disagree; 5=strongly agree); agreement = scale points 4-5

In spite of the recession and media crisis, European PR professionals are rather optimistic for 2010

"Thinking of the communication function within your organisation or of your consultancy, are you optimistic or pessimistic for the next year?"



www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries; Q 16

Interpretation

PR practitioners face the recession and media crisis with defensive strategies

_ Both the economic recession and the crisis of the mass media sector have changed the framework for communication management in Europe. The long-term upswing of the occupational field has come to an end. 47% report budget cuts and 22% report that staff numbers have been reduced. This is especially true for joint stock and private companies, whereas governmental and non-profit organisations are less under pressure. Anecdotal evidence claiming budget shifts from marketing communications to public relations could not be verified on a large scale. Nevertheless, more than 80% of the respondents are optimistic for the next year.

_ A clear 60% majority claim they will respond to the recession by focusing on the "most relevant issues and stakeholders". Another 40% see a stronger demand for evaluation. This means that PR strategies have not been managed up to the highest standards until now – strategic priorities and transparent measures should be a part of communication management anyway. Only one third of the respondents say that they will take a proactive approach by investing in new instruments or tools.

_ Following this approach, three out of four practitioners think that communication management will adapt to new routines evolving in journalism in times of the media crisis. 33% state that communication professionals will help the media to survive, i.e. by providing free content. Speaking in terms of the intereffication theory (Bentele/ Nothhaft 2008), media relations shows strong adaptations to journalism, compared to significantly less inductions.

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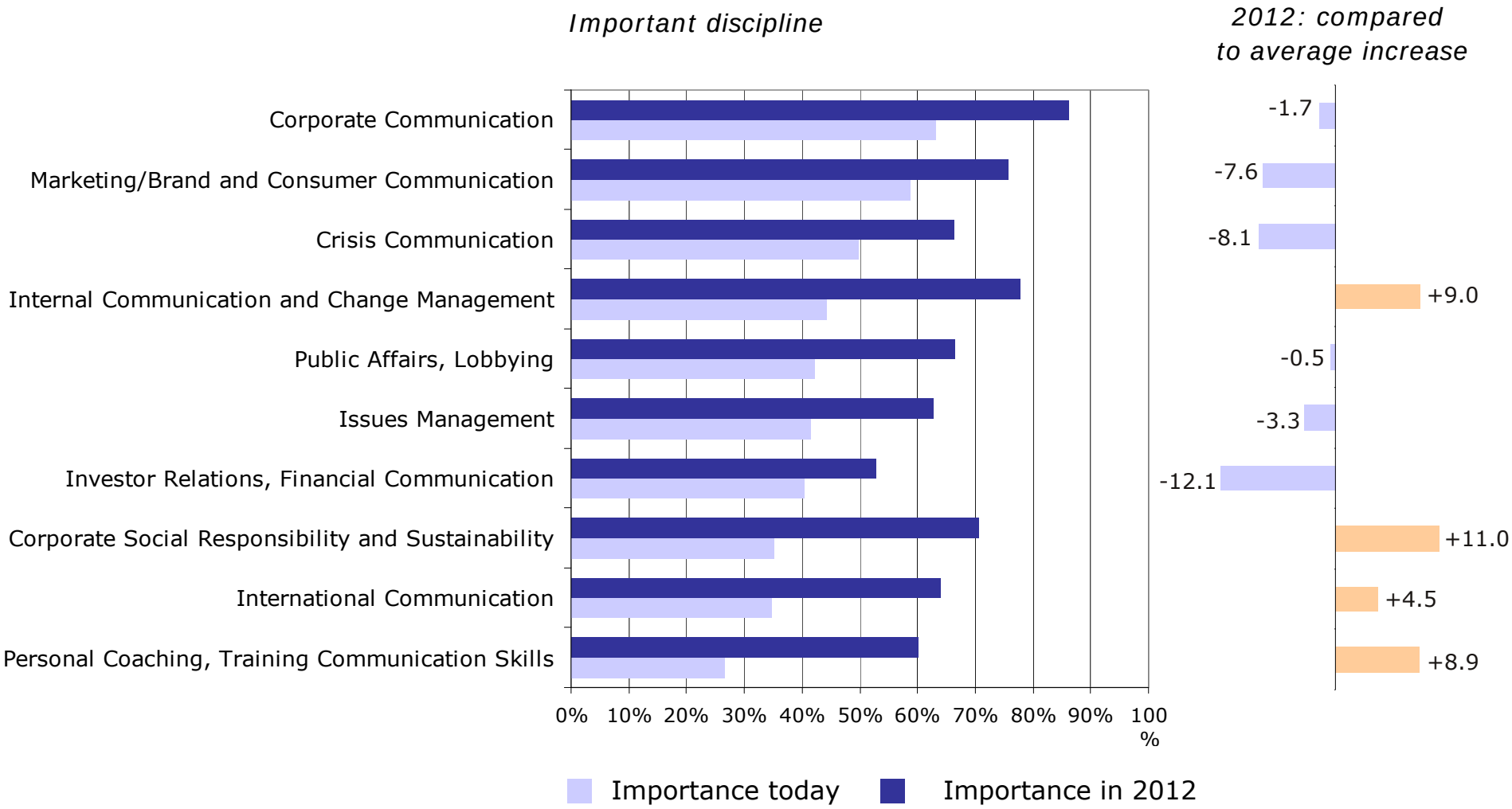
Development of disciplines and communication channels

Most important disciplines in communication management

	Today		In 2012	
1	Corporate Communication	1	Corporate Communication	→
2	Marketing/Brand and Consumer Communication	2	Internal Communication and Change Management	↑
3	Crisis Communication	3	Marketing/Brand and Consumer Communication	↘
4	Internal Communication and Change Management	4	CSR and Sustainability	↑
5	Public Affairs / Lobbying	5	Public Affairs / Lobbying	→

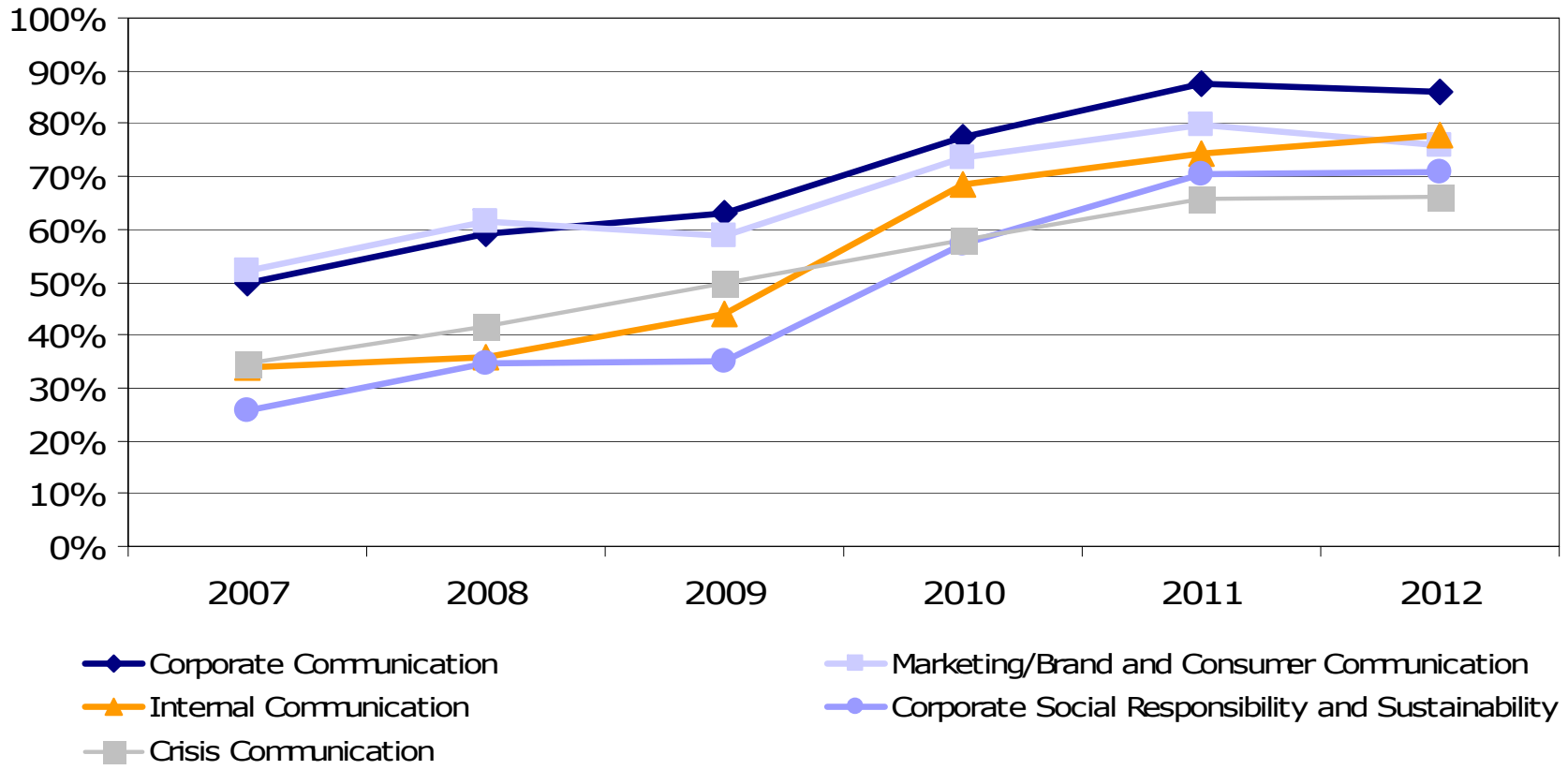
www.communicationmonitor.eu / Zerfass et al. 2009 / n^{max} = 1,863 PR Professionals from 34 European countries;
Q 4: How important are the following fields of practice in your organisation or consultancy? Will they gain more or less importance within the next three years? (1 = not important; 5 = very important); important discipline = scale points 4-5.
Arrow symbols indicate changes within the ranking of most important disciplines; in general, all disciplines are ascending.

Expected development of disciplines and fields of practice



www.communicationmonitor.eu / Zerfass et al. 2009 / n^{max} = 1,863 PR Professionals from 34 European countries;
Q 4: How important are the following fields of practice in your organisation or consultancy? Will they gain more or less importance within the next three years? (1 = not important; 5 = very important); important discipline = scale points 4-5.
All disciplines are considered more important in 2012; comparison shows difference to the average increase (23.6%).

Long-term development of communication disciplines: Internal may overtake marketing/consumer in 2012



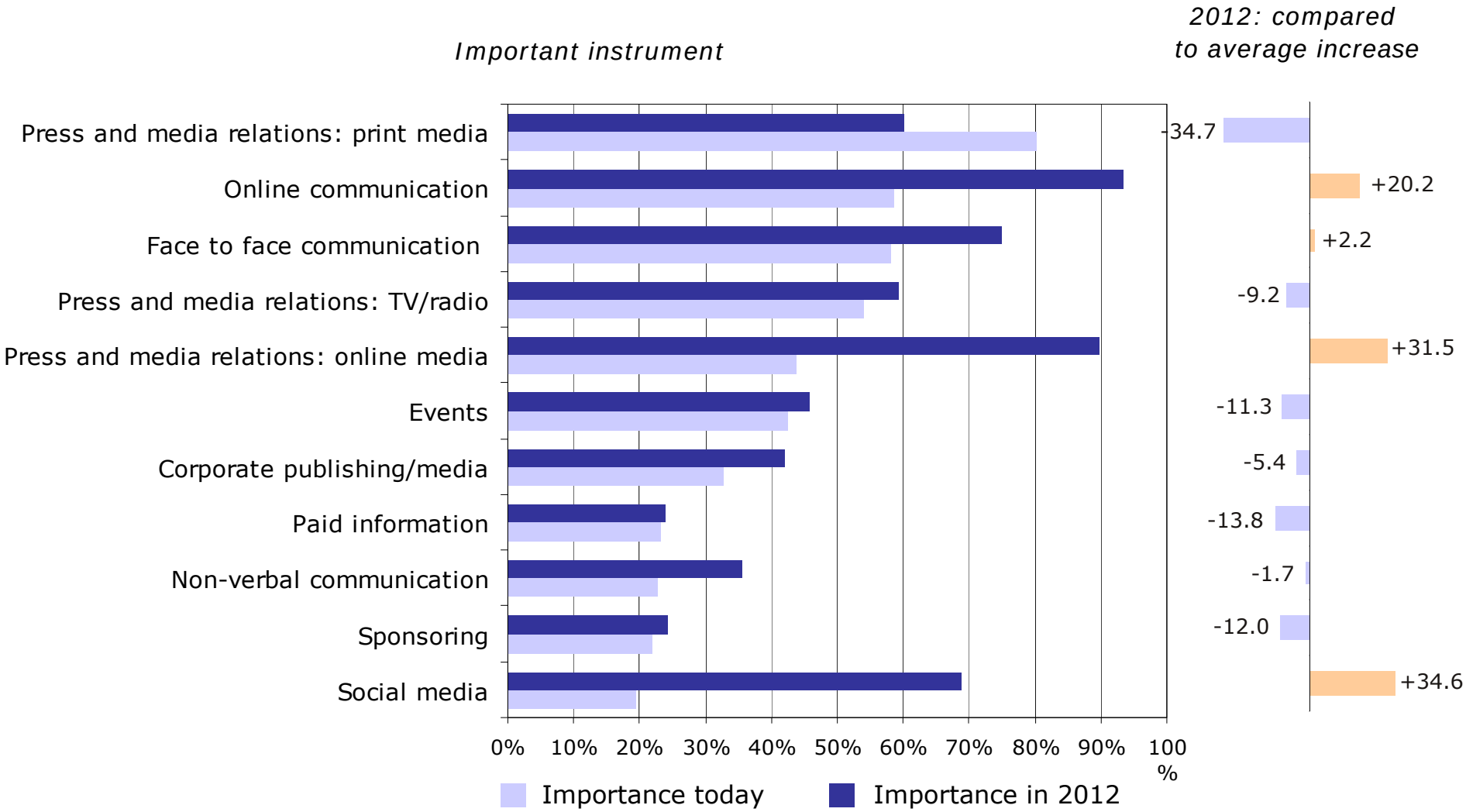
www.communicationmonitor.eu / Zerfass et al. 2009 / n^{max} = 1,863 PR Professionals from 34 European countries; Q 4;
Zerfass et al. 2008 / n = 1,524 PR Professionals from 37 countries; Q 2; Zerfass et al. 2007 / n = 1,087 from 22 countries; Q 3

Important channels and instruments

	Today		In 2012	
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	Face to face communication	→
4	Press and media relations: TV/radio	4	Social media	↑
5	Press and media relations: Online media	5	Press and media relations: print media	↓

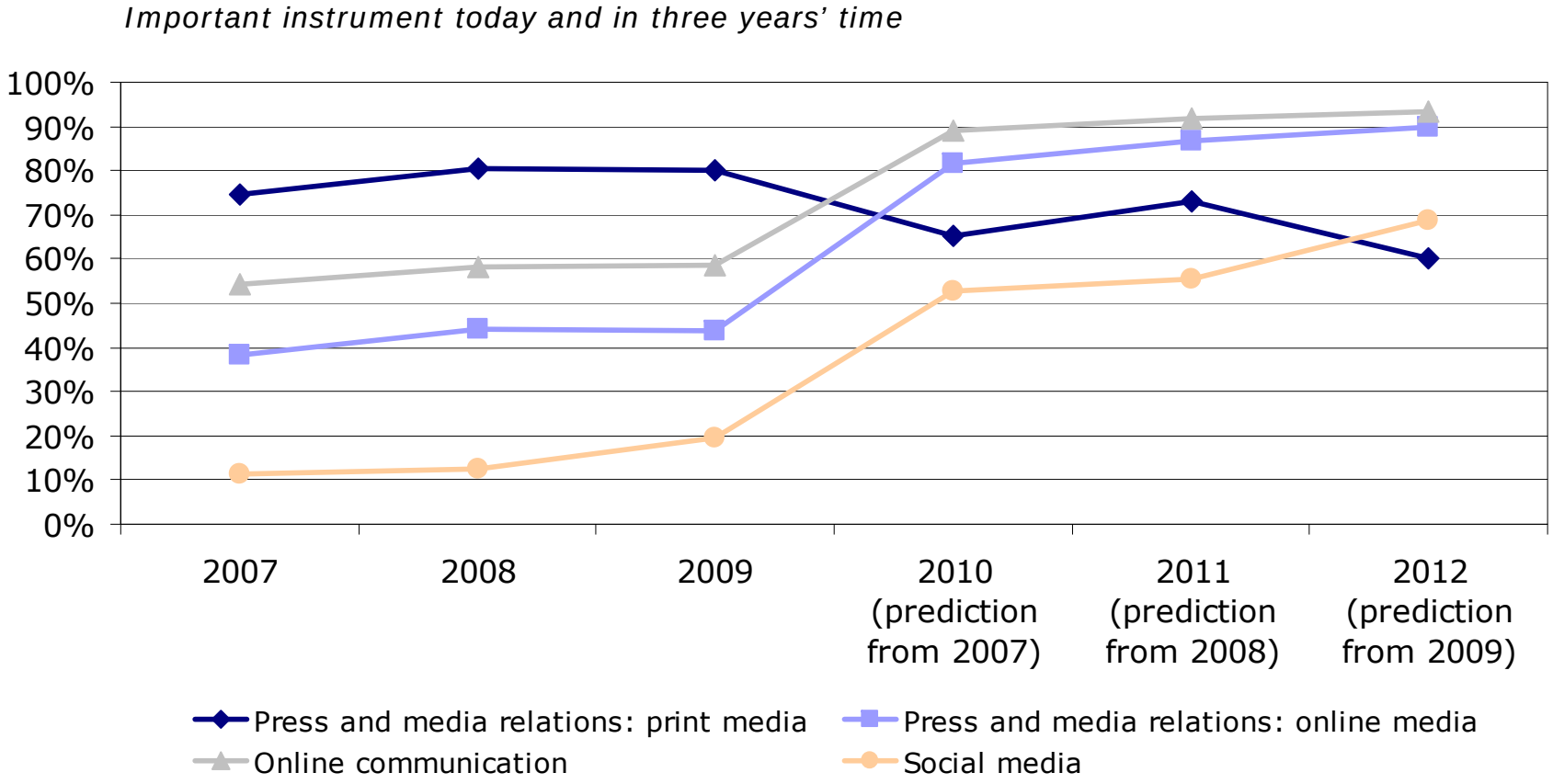
www.communicationmonitor.eu / Zerfass et al. 2009 / n^{max} = 1,863 PR Professionals from 34 European countries; Q 5: How important are the following methods in addressing stakeholders, gatekeepers and audiences? Will this change within the next three years? (1 = not important; 5 = very important); important channel = scale points 4-5. Arrow symbols indicate changes within the ranking of instruments.

Expected development of communication channels



www.communicationmonitor.eu / Zerfass et al. 2009 / n^{max} = 1,863 PR Professionals from 34 European countries;
Q 5: How important are the following methods in addressing stakeholders, gatekeepers and audiences? Will this change within the next three years? (1 = not important; 5 = very important); important instrument = scale points 4-5.

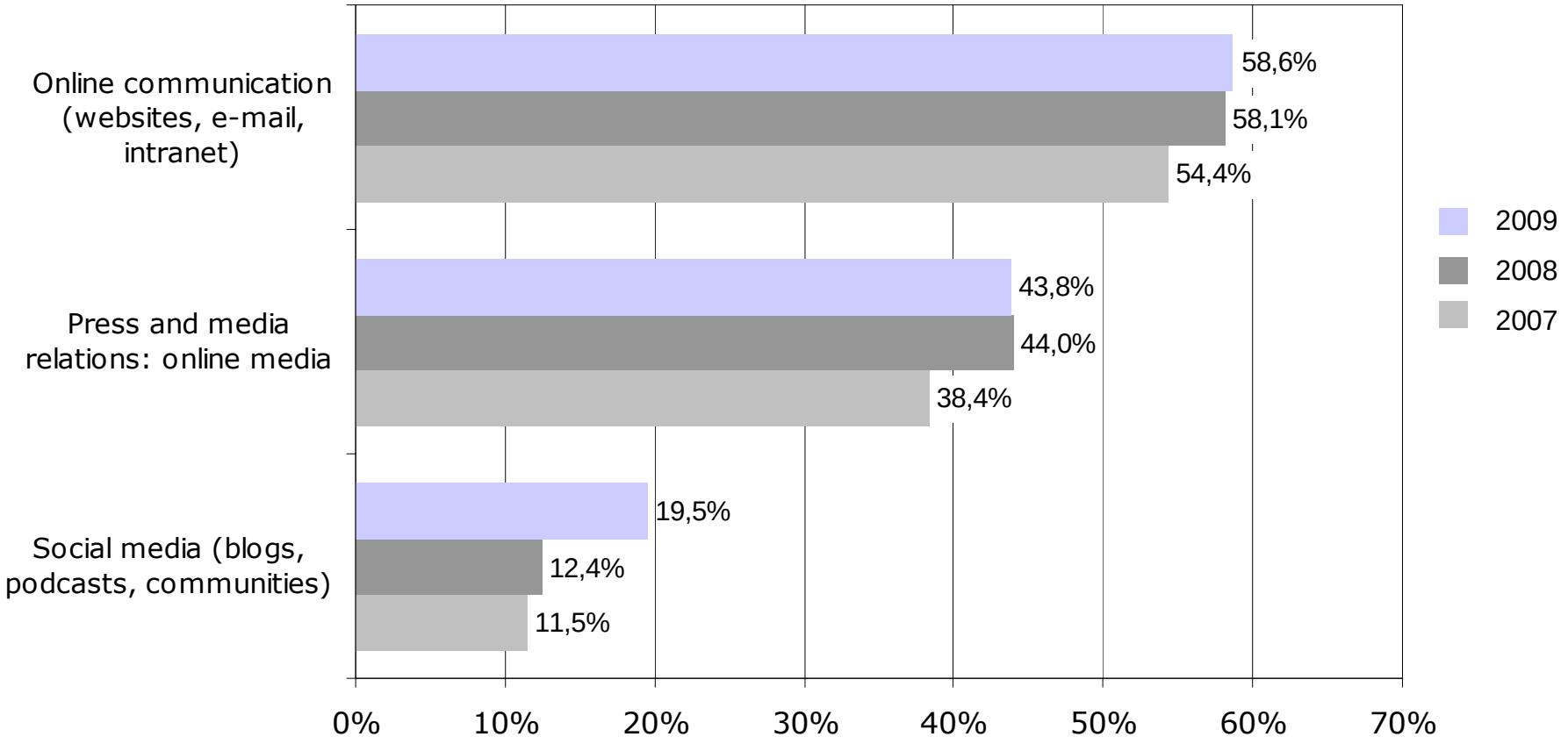
In line with previous surveys, online channels are expected to increase significantly – but the actual level is quite stable



www.communicationmonitor.eu / Zerfass et al. 2009 / n^{max} = 1,863 PR Professionals from 34 European countries; Q 5; Zerfass et al. 2008 / n = 1,524; Q 3; Zerfass et al. 2007 / n = 1,087; Q 3: How important are the following methods in addressing stakeholders, gatekeepers and audiences? Will this change within the next three years? (1 = not important; 5 = very important); important = scale points 4-5

The relevance of social media has almost doubled during the last 24 months, but other online instruments are way ahead

Important instruments for addressing stakeholders, gatekeepers and audiences



www.communicationmonitor.eu / Zerfass et al. 2009 / n^{max} = 1,863 PR Professionals from 34 European countries; Q 5; Zerfass et al. 2008 / n= 1,524; Q 3; Zerfass et al. 2007, n = 1,087; Q 4 : How important are the following methods in addressing stakeholders, gatekeepers and audiences? (1 = not important; 5 = very important); important = scale points 4-5

Valuation of communication instruments is influenced by the overall organisational culture

Important instruments	Integrated	Interactive	Entrepreneurial	Systematized
Press and media relations				
- addressing print media	80.2%	75.2%	84.4%	71.1%
- addressing online media	49.5%	36.7%	37.5%	30.6%
- addressing TV/radio	56.2%	45.9%	53.1%	33.3%
Corporate publishing/media	40.4%	29.4%	12.5%	34.4%
Online communication	66.3%	57.8%	43.8%	51.6%
Social media	22.5%	13.8%	9.4%	10.0%
Events	47.4%	52.3%	43.8%	36.7%
Sponsoring	19.2%	22.4%	12.9%	20.0%
Face-to-face communication	65.0%	62.0%	62.5%	40.0%
Non-verbal communication	24.6%	19.6%	23.3%	13.3%
Paid information	20.0%	27.5%	18.8%	21.5%
n =	519	109	32	122

Integrated culture
- participative towards people
- proactive towards environment

Interactive culture
- participative towards people
- reactive towards environment

Entrepreneurial culture
- non-participative towards people
- proactive towards environment

Systematized culture
- non-participative towards people
- reactive towards environment

www.communicationmonitor.eu / Zerfass et al. 2009 / n = 782 PR Professionals in communication departments which clearly identified their organisational culture; Q 5: How important are the following methods in addressing stakeholders, gatekeepers and audiences? (1 = not important; 5 = very important); important = scale points 4-5

Interpretation

Internal communication and CSR are steadily growing

_ Respondents expect a changing relevance of the various disciplines within the broad range of strategic communication. For the first time in the monitor survey, corporate communication has taken the lead, followed by long-time forerunner marketing/brand and consumer communication.

_ Internal communication and corporate social responsibility / sustainability have grown. They are predicted to be the fastest-growing fields of practice until 2012. This is consistent with results of previous surveys in this research series. In the long term, internal communication may even become more important than the marketing/consumer field.

Social media takes off, relations with print media reduced in importance

_ Regarding communication instruments, social media like blogs, podcasts and online communities and addressing online journalists are on a clear upswing. Predicted growth is 35% (32%) over the average, compared to 26% each last year.

_ Press relations addressing print media is expected to decline by 35% below the average, even more dramatically than last year (25% below the average).

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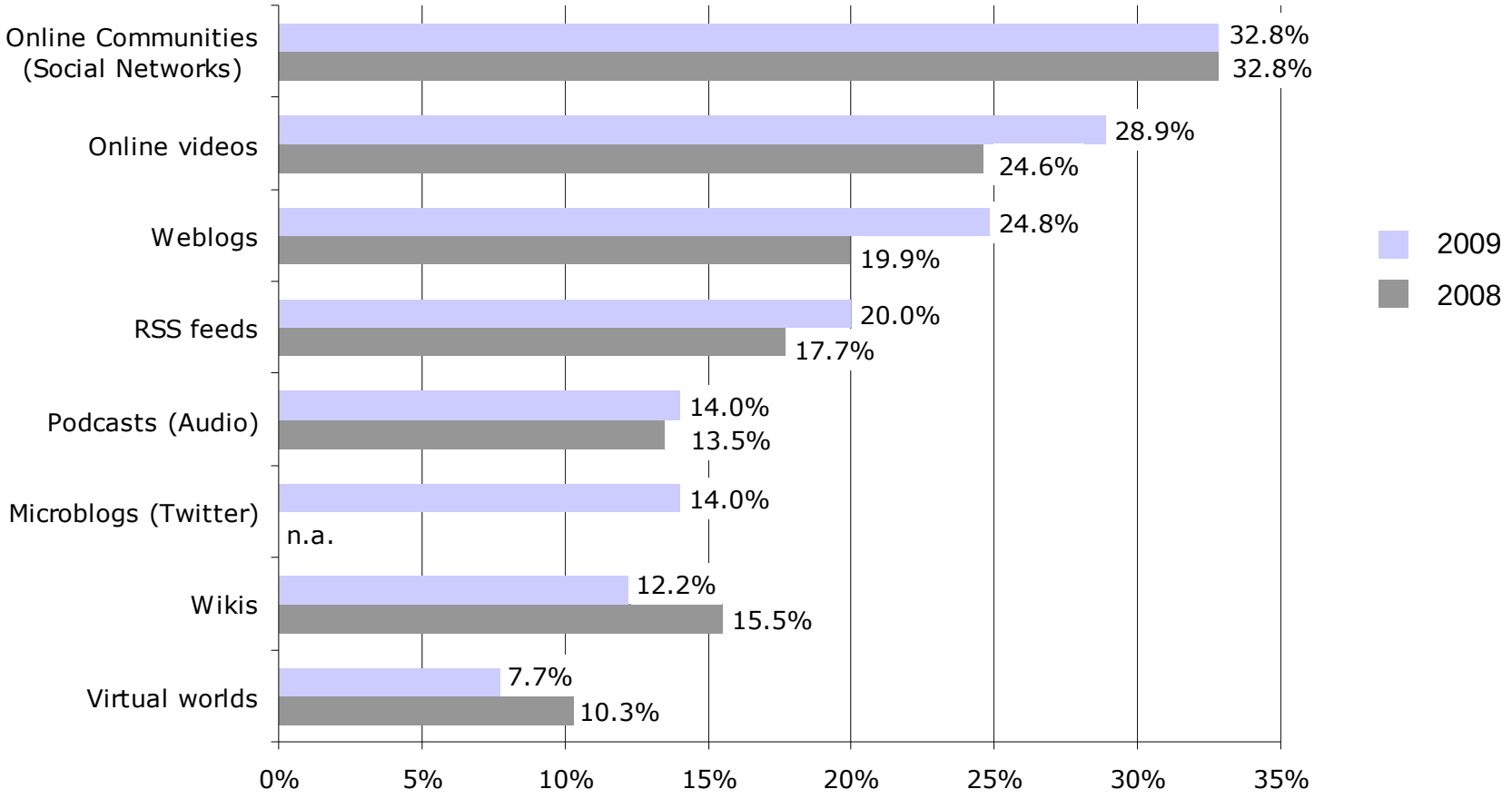
Interactive communication: overall trends and online communities

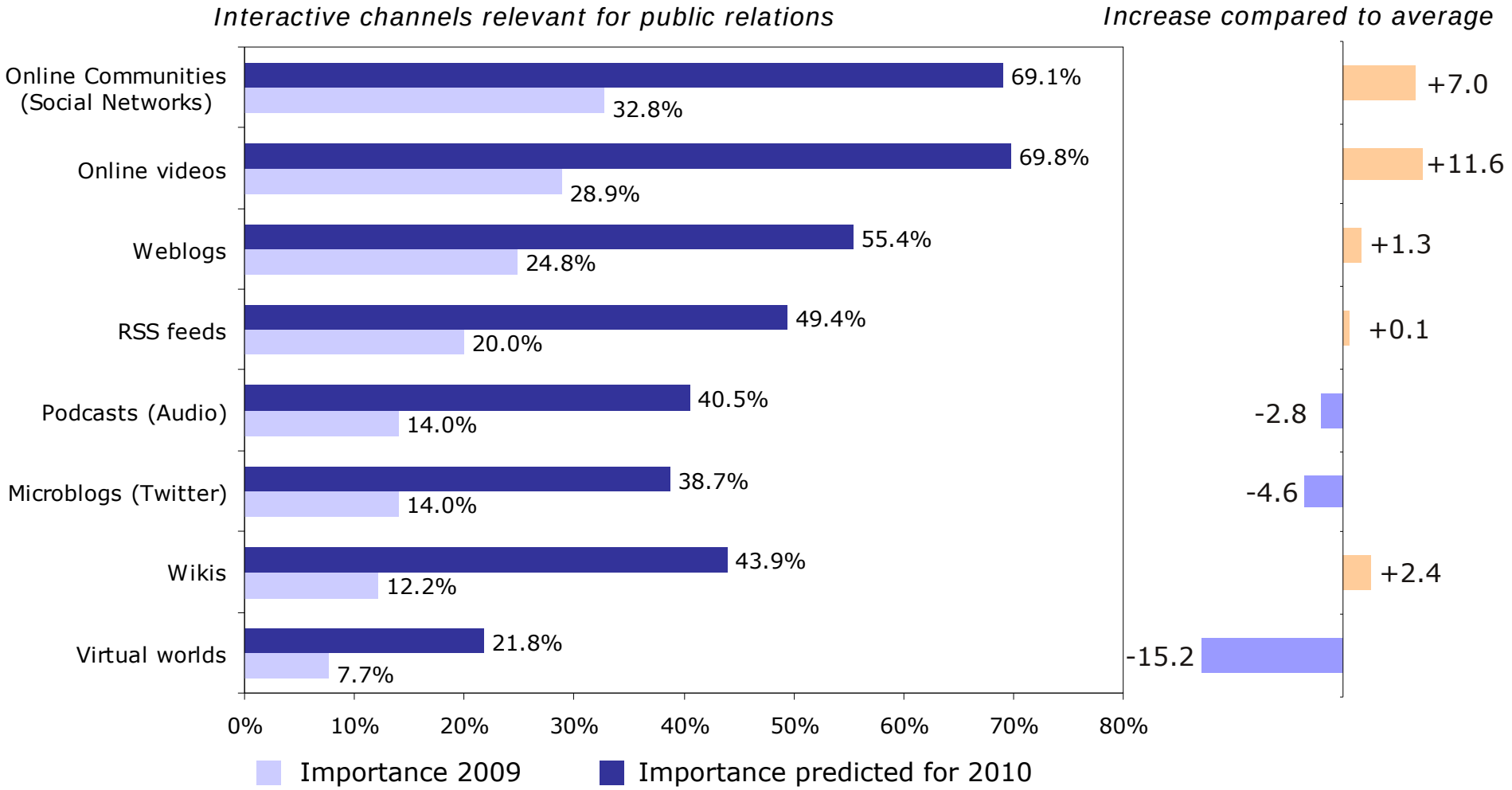
Social media in communication management: online communities are leading the field – but web videos and blogs are growing fast

Interactive channels important for public relations



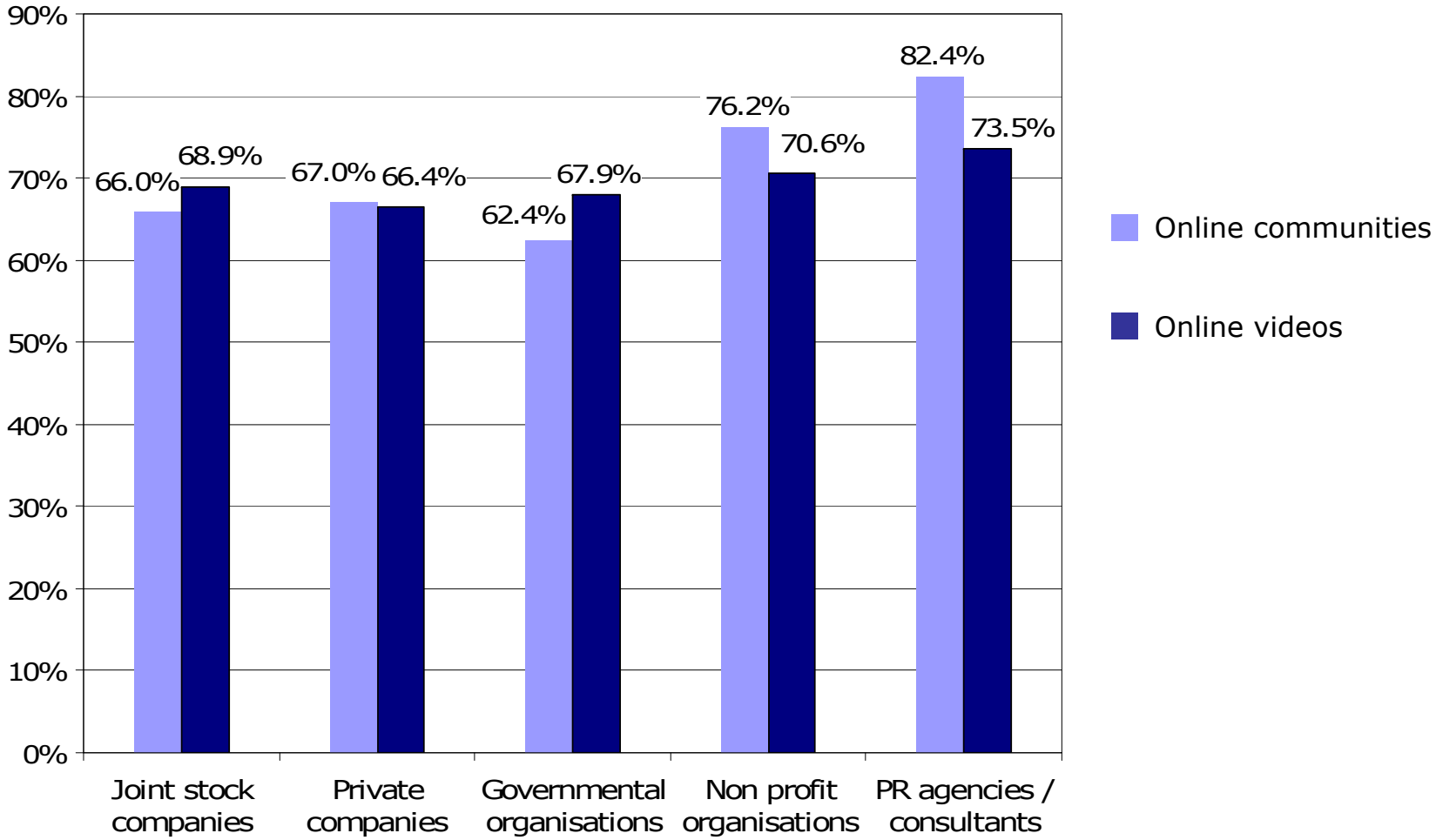
www.communicationmonitor.eu / Zerfass et al. 2009 / n^{max} = 1,863 PR Professionals from 34 European countries; Q 10; Zerfass et al. 2008 / n = 1,524 PR professionals; Q 7: Can you indicate the level of importance for public relations today and in the next year of the following communication tools (1= not important; 5= very important); important = scale points 4-5

PR professionals predict a tremendous yet unlikely boost for all social media until 2010, but variances are most interesting



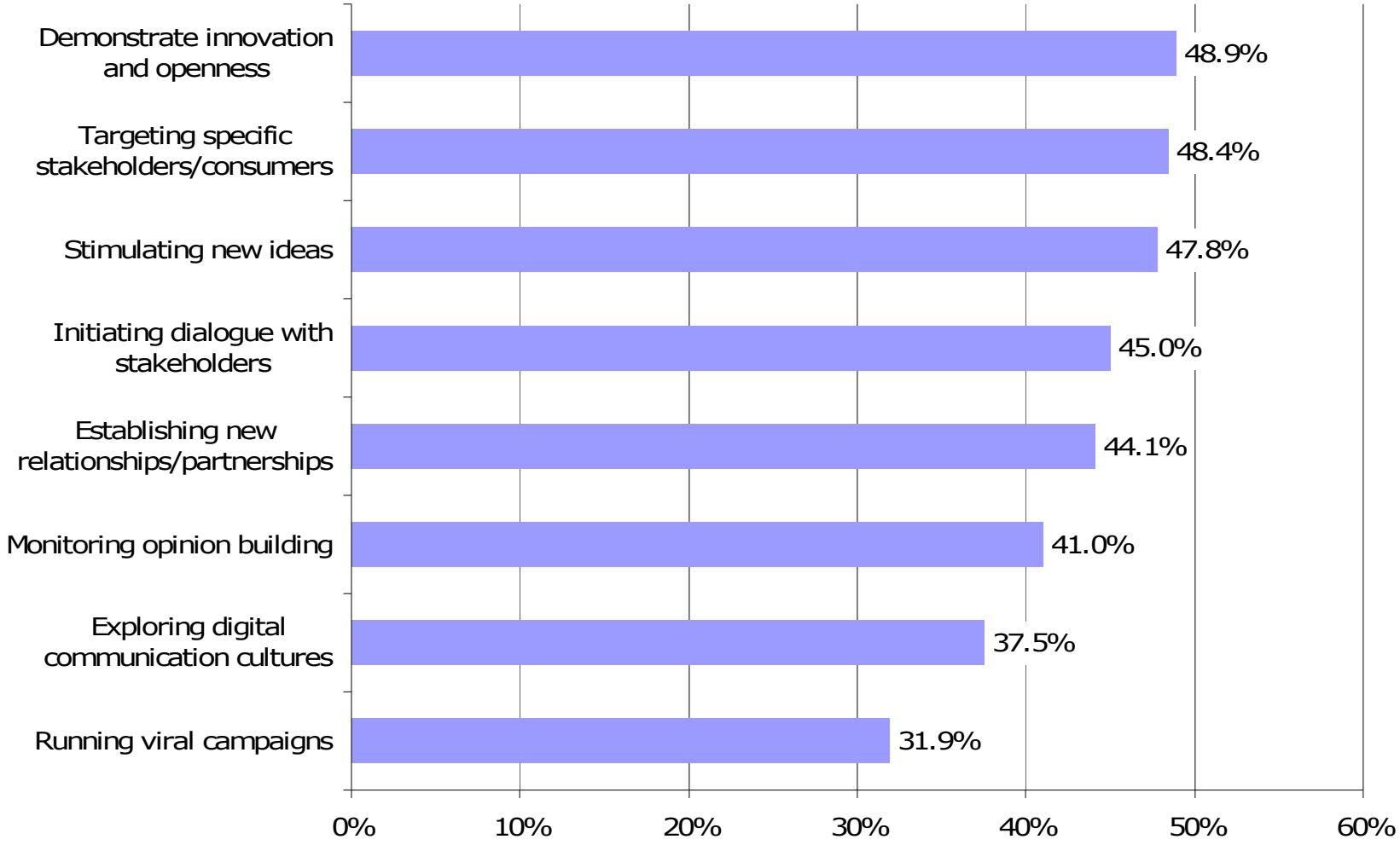
www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries; Q 10: Can you indicate the level of importance for public relations today and in the next year of the following communication tools (1= not important; 5= very important); important = scale points 4-5. All are considered more important in 2010; comparison shows difference to avg. increase (29.28%).

Social networks and web videos are inspiring the profession; on average nearly 70% think they will be important in 2010



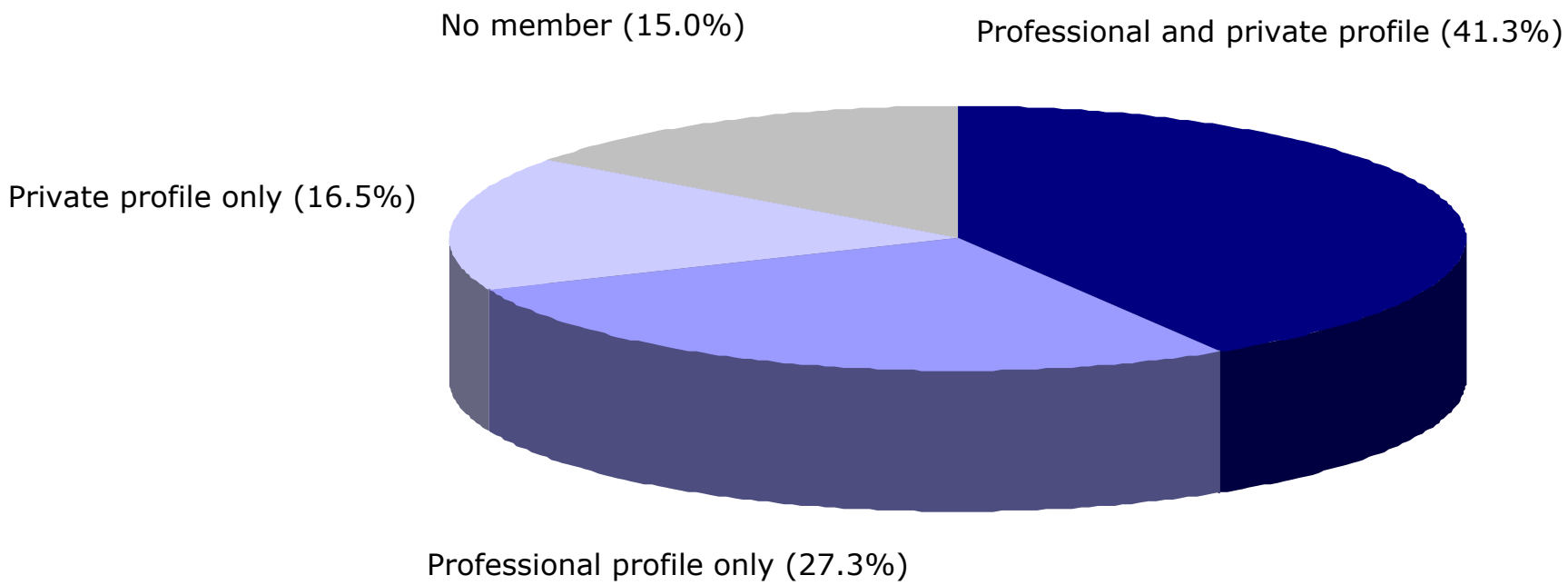
www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries;
Q 10: Can you indicate the level of importance for public relations today and in the next year of the following communication tools (1 = not important; 5 = very important); important tool = scale points 4-5

Social networks are utilized within communication strategies for a variety of reasons



www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals in communication departments;
Q 11: How will your organisation use social networks within its online communication strategy within the next 12 month?
(1 = do not use at all; 5 = use extensively; methods used = scale points 4-5)

85% of European communication professionals are members of online communities like LinkedIn, Facebook and XING



www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals; Q 17: Are you a member of one of those social networks? Facebook, LinkedIn, MySpace, Plaxo, XING, Other (With my professional profile/With a private profile)

LinkedIn is the most popular social network among communication professionals in Europe

	PR practitioners with a professional profile	PR professionals with a private profile
LinkedIn	55.4%	11.2%
XING	19.8%	4.7%
Plaxo	14.8%	4.3%
Facebook	12.2%	48.5%
MySpace	1.1%	6.0%
Other	11.3%	14.8%

www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals; Q 17: Are you a member of one of those social networks? Facebook, LinkedIn, MySpace, Plaxo, XING, Other (With my professional profile/With a private profile)

Interpretation

Strong growth of online channels, but sceptical view on Twitter

_ Only three out of ten professionals in Europe think that online communities (social networks) and online videos are important for public relations today. 25% say that weblogs – a much-discussed platform in the field – are relevant. However, this changes dramatically: 70% say that videos and online communities will be important in 2010. Nearly every social media platform is judged this way.

_ Despite strong reports in the media, microblogging with Twitter is only considered important by 14% of communication professionals in Europe until now, and 39% state that it will be important next year. The platform is a long way from being well-known or accepted, and is still lagging behind podcasts and wikis.

Social networks are used as communication tools, less for monitoring

_ Factor analysis provides no specific patterns of motives for using online communities in communication management. Professionals state a variety of reasons ranging from demonstrating openness to establishing new relationships. Monitoring opinion building and exploring digital cultures is less prevalent. This reinforces that most participants are sticking to outbound activities; inbound strategies are less important.

_ 85% of PR professionals in Europe are themselves members of social networks, with LinkedIn heading the number of professional profiles and Facebook the private realm.

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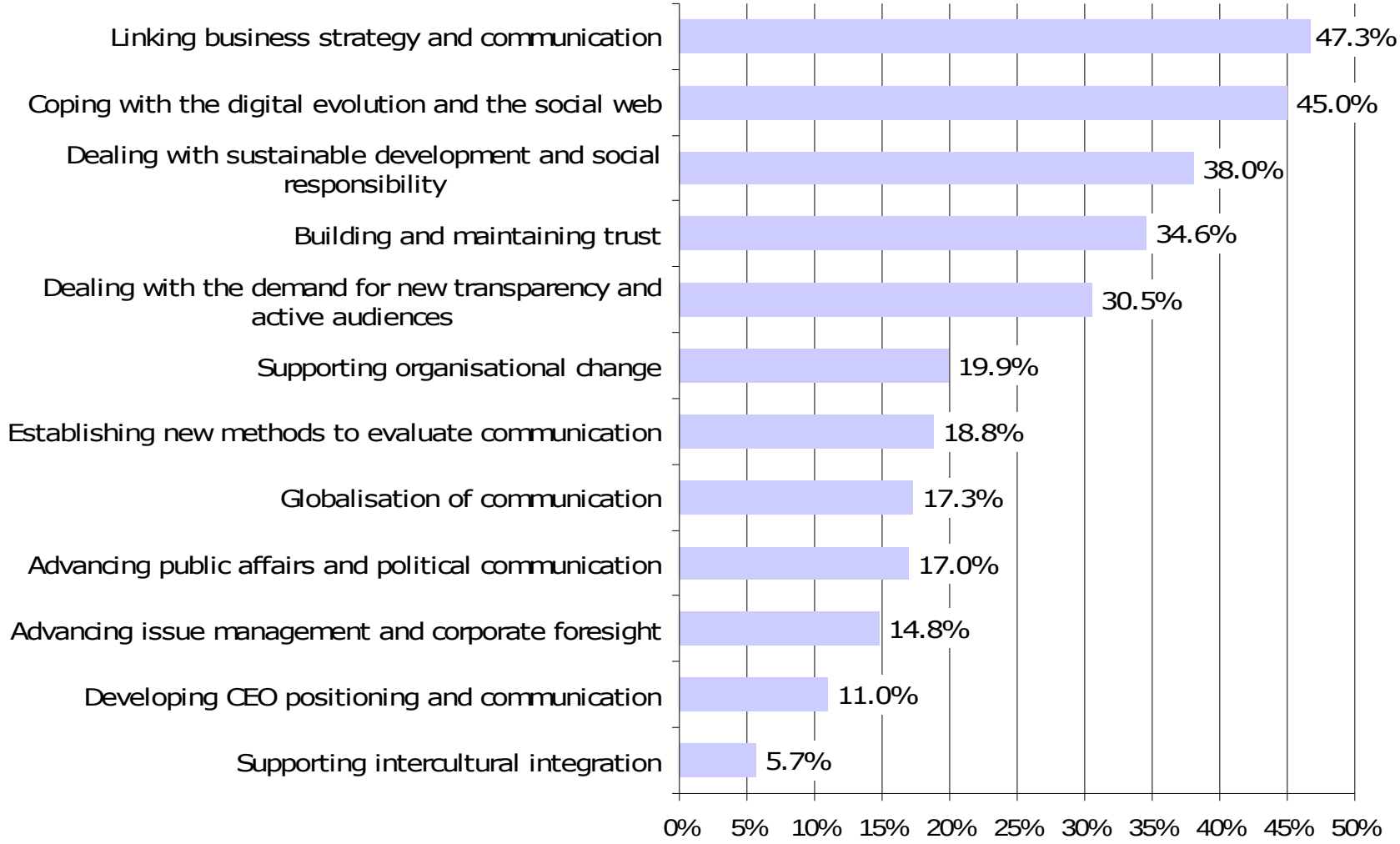
Strategic issues

Challenges for communication management in Europe

Most important issues within the next three years		
1	Linking business strategy and communication	47.3%
2	Coping with the digital evolution and the social web	45.0%
3	Dealing with sustainable development and social responsibility	38.0%
4	Building and maintaining trust	34.6%
5	Dealing with the demand of new transparency and active audiences	30.5%

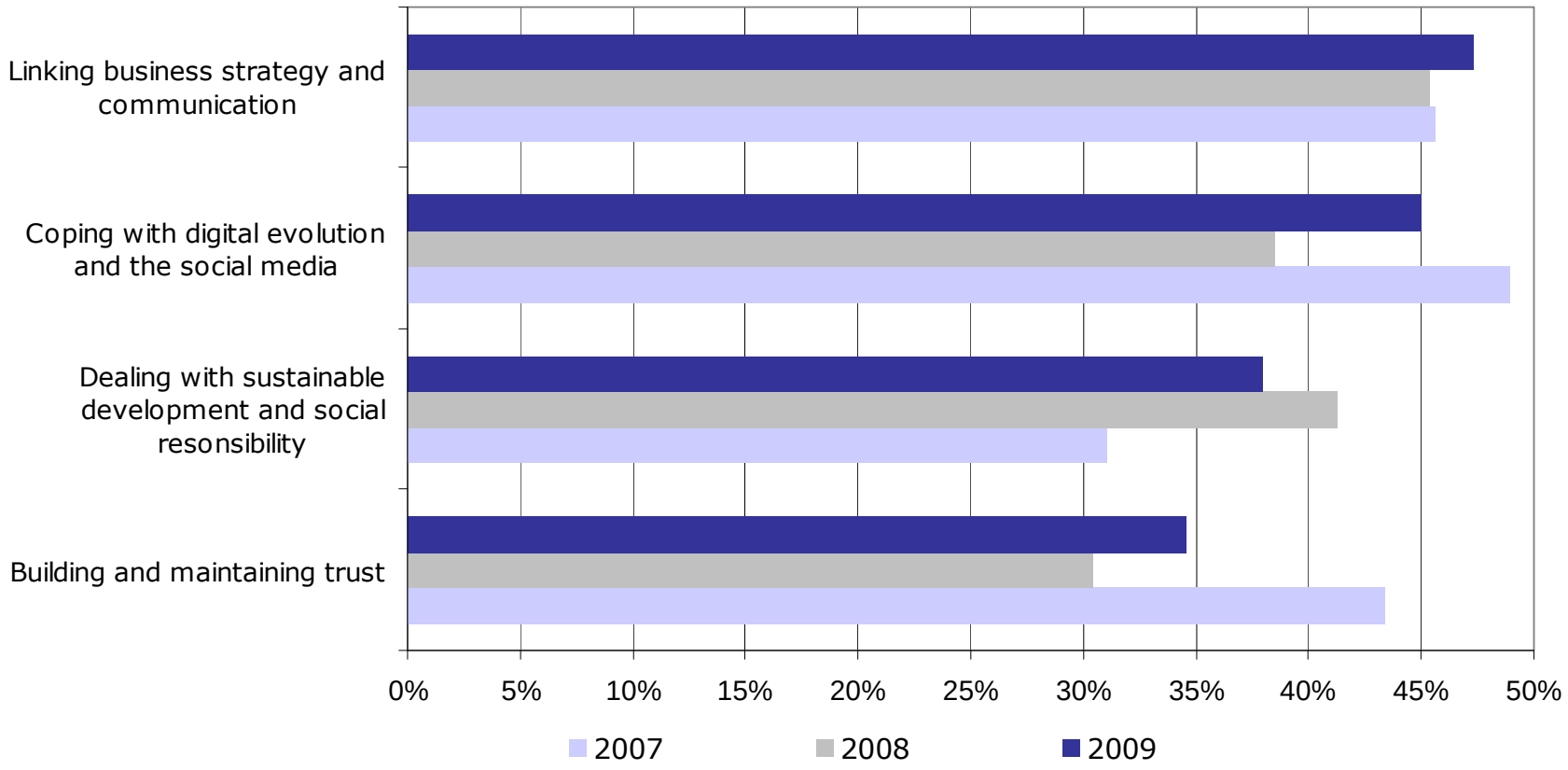
www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries;
Q 6: Here are some issues that might become relevant for public relations and communication management within the next three years. Please pick those 3 items which are most important from your point of view.

The most important issues in detail



www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries;
Q 6: Here are some issues that might become relevant for public relations and communication management within the next three years. Please pick those 3 items which are most important from your point of view.

Relevance of strategic issues compared to previous surveys



www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries; Q 6; Zerfass et al. 2008 / n = 1,524 PR Professionals from 37 countries; Q 6; Zerfass et al. 2007 / n = 1,087 PR Professionals from 24 countries;
Q 5: Here are some issues that might become relevant for public relations and communication management within the next three years. Please pick those 3 items which are most important from your point of view.

Interpretation

Clear priorities for communication management in Europe

_ The survey identifies two main issues of major importantance for communication professionals throughout Europe. Half of the respondents state either that linking business strategy and communication and/or coping with the digital evolution and the social web are most relevant for themselves within the near future. Whereas the business link is the number one issue for the past three years with a 2% rise since 2008, questions regarding the social web have been intensified (+7%).

_ Social responsibility and sustainable development is still important, but has lost ground (-3%), whereas more professionals state that building and maintaining trust is a major issue (+4%). This may resemble the crisis in business and society. Companies and senior management have lost credibility, reputation and trust. At the same time, many CSR activities still have to prove that they are really linked to the core activities and legitimacy of the organisation. It is also plausible that budget cuts affect voluntary activities in this area.

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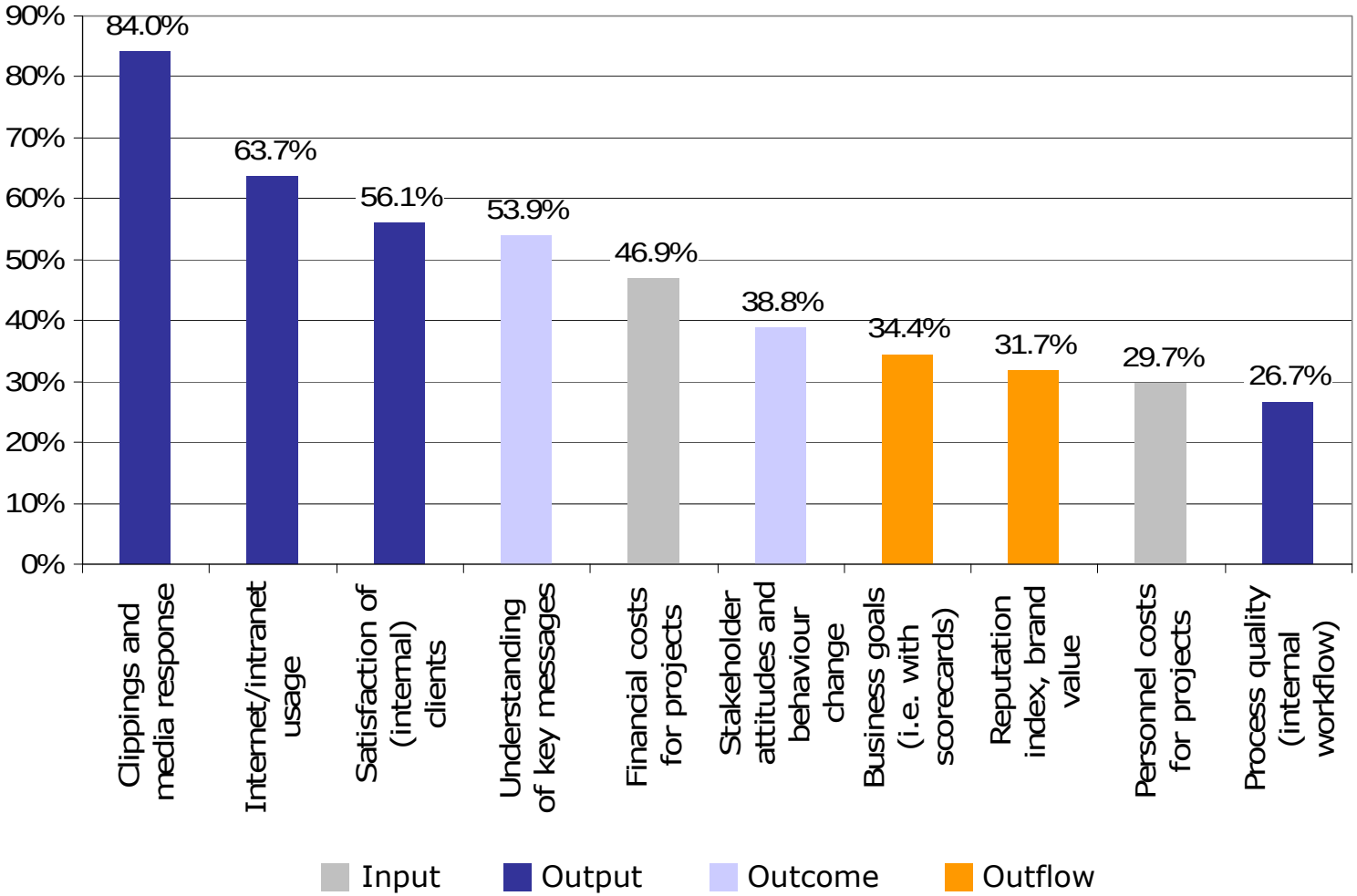
Evaluation and communication performance

How PR professionals in Europe measure their activities



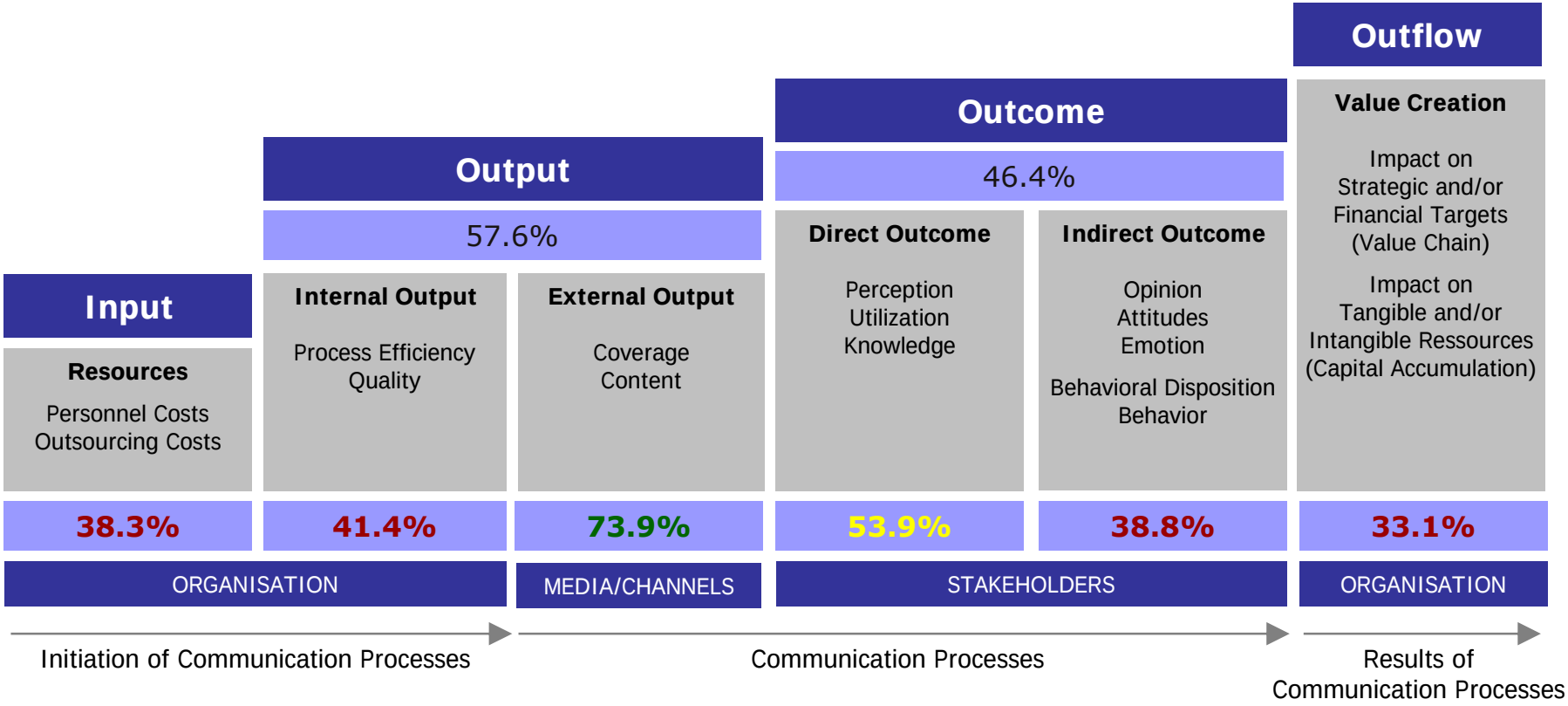
www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries;
Q 9: Which items do you monitor or measure to assess the effectiveness of public relations / communication management? (1 = do not use at all; 5 = use continuously); methods used = scale points 4-5

Evaluation practice: 84% measure their impact on the media, but only one third tracks effects on their own organisation

Most popular measures on different levels of evaluation	
Outflow (effects on the own organisation) Business goals (i.e. with scorecards)	34.4%
Outcome (effects on stakeholders) Understanding of key messages	53.9%
Output (availability of messages/offerings) Clippings and media response	84.0%
Input (initiation of communication) Financial costs for projects	46.9%

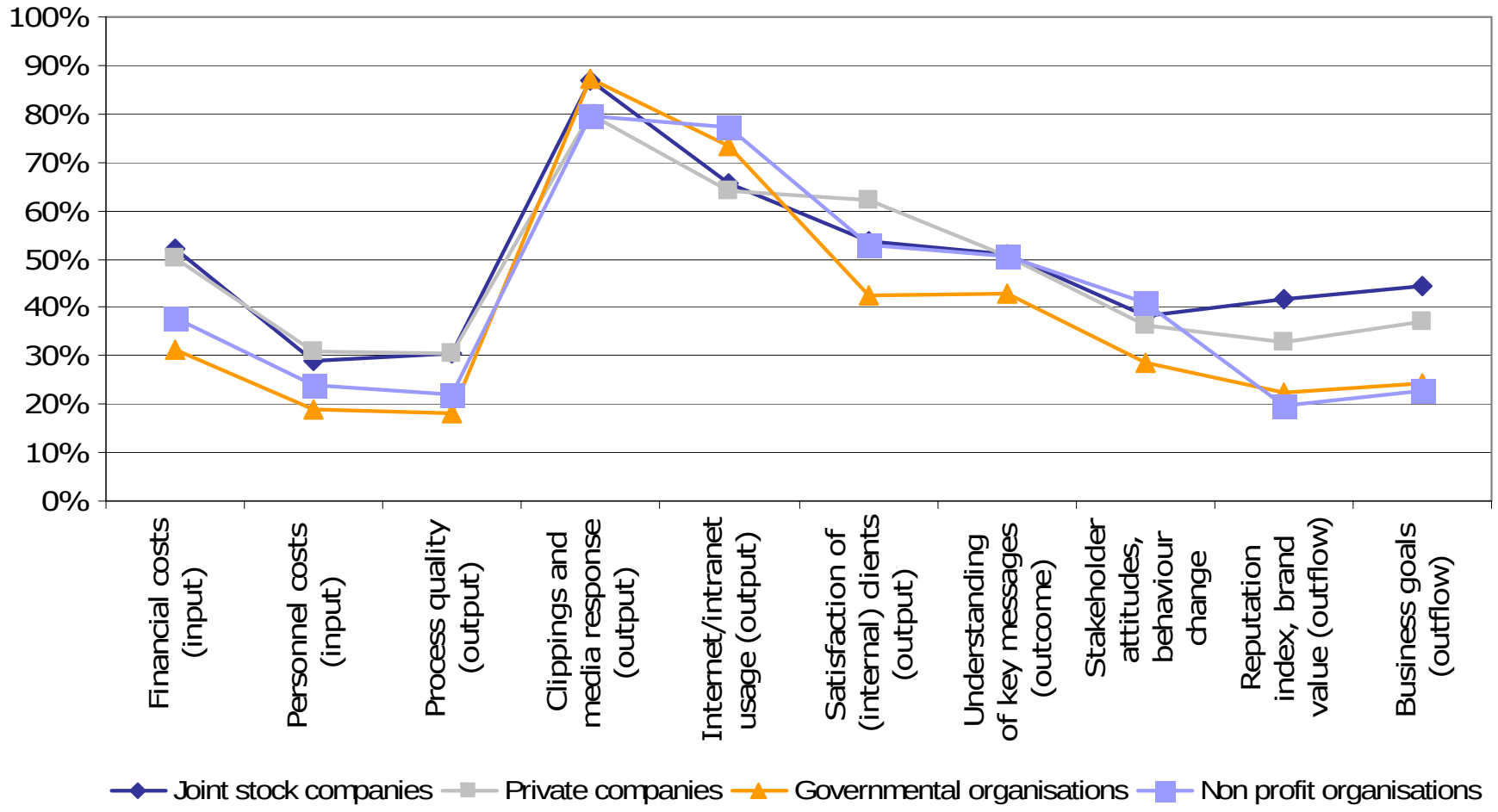
www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries;
Q 9: Which items do you monitor or measure to assess the effectiveness of public relations / communication management? (1 = do not use at all; 5 = use continuously); methods used = scale points 4-5

When measuring their activities, communication professionals focus on a small part of the overall process



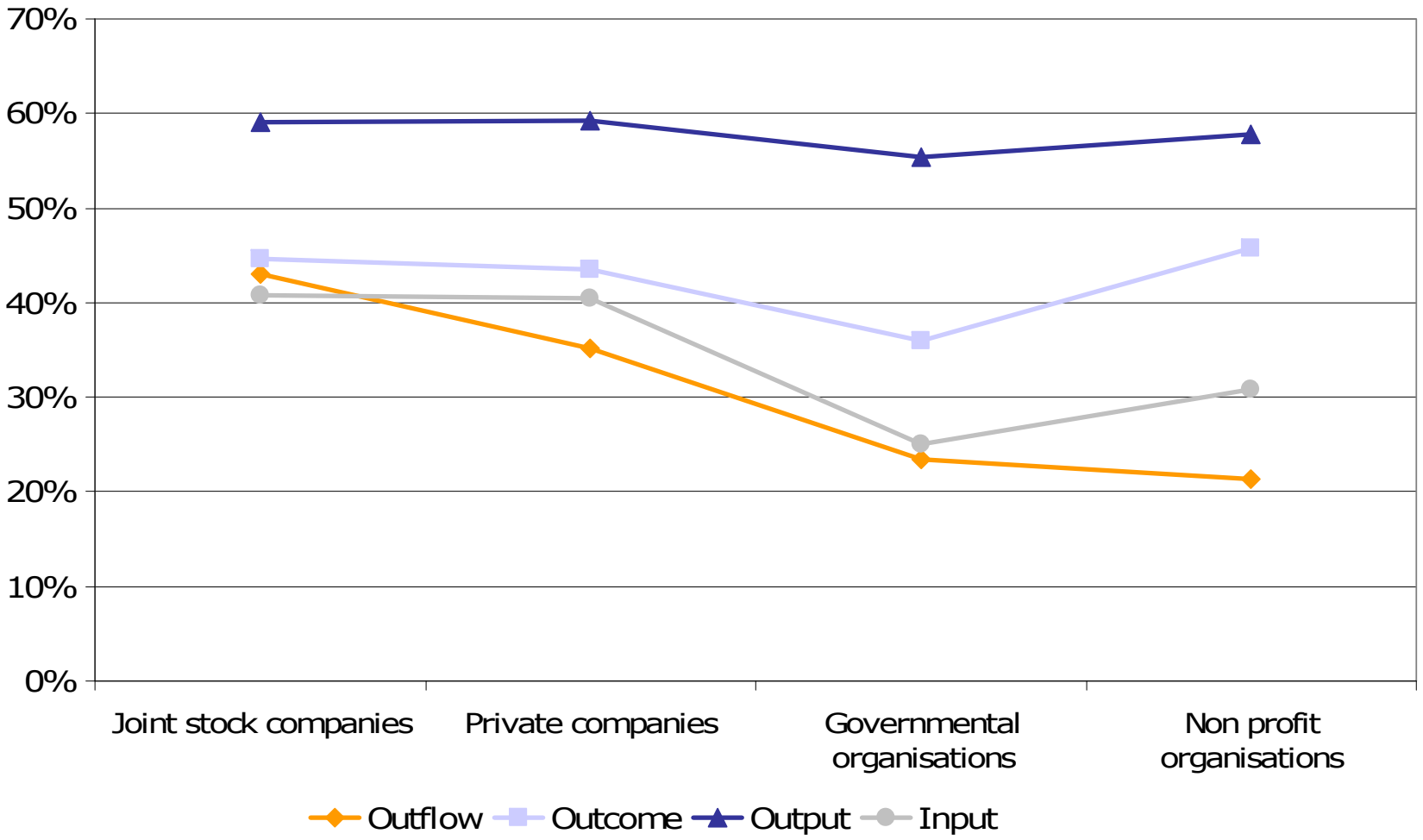
www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries;
Q 9: Which items do you monitor or measure to assess the effectiveness of public relations / communication management? (1 = do not use at all; 5 = use continuously; methods used = scale points 4-5)
Figures depicted within the DPRG/ICV (2009) framework for communication measurement, www.communicationcontrolling.com

Joint-stock and private companies are forerunners in monitoring costs and measuring the business impact



www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,346 PR Professionals in communication departments;
Q 9: Which items do you monitor or measure to assess the effectiveness of public relations / communication management? (1 = do not use at all; 5 = use continuously); methods used = scale points 4-5

Communication measurement in different organisations



www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,346 PR Professionals in communication departments;
Q 9: Which items do you monitor or measure to assess the effectiveness of public relations / communication management? (1 = do not use at all; 5 = use continuously); methods used = scale points 4-5

Methods used in different organisations

	Joint stock	Private	Govern-mental	Non profit	*Overall*
Financial costs for projects	52.3%	50.3%	31.2%	37.9%	*45.8%*
Personnel costs for projects	29.1%	30.7%	19.0%	23.8%	*26.9%*
Process quality	30.4%	30.4%	18.1%	22.0%	*26.9%*
Clippings and media response	87.0%	80.1%	87.3%	79.4%	*84.1%*
Internet/intranet usage	65.5%	64.0%	73.4%	77.1%	*68.4%*
Satisfaction of (internal) clients	53.5%	62.3%	42.6%	52.8%	*53.7%*
Understanding of key messages	51.0%	50.6%	43.0%	50.5%	*49.4%*
Stakeholder attitudes, behaviour change	38.3%	36.3%	28.7%	41.1%	*36.6%*
Reputation index, brand value	41.6%	33.0%	22.4%	19.6%	*32.5%*
Business goals	44.3%	37.1%	24.5%	22.9%	*35.6%*

www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,346 PR Professionals in communication departments;
Q 9: Which items do you monitor or measure to assess the effectiveness of public relations / communication management? (1 = do not use at all; 5 = use continuously); methods used = scale points 4-5

Interpretation

Large parts of the field are still dominated by a narrow view on measurement

_ In accordance with last year's results, communication managers in Europe mainly rely on monitoring clippings and media response (84%) and internet/intranet usage (64%) when evaluating their activities. Only one third states that tracking business goals and reputation or brand value plays a role. Taking into account that self-reporting in this much-discussed area tends to be rather optimistic, this is a strong hint that measurement practice is far behind the ideal.

_ Comparing the empirical data with the up-to-date framework for communication measurement issued by PR associations and controller associations (DPRG/ICV 2009), a predominance of external output evaluation is obvious, followed by exploring the direct outcome on stakeholder's perception or knowledge. Measures that catch the far ends of the overall process, i.e. evaluating resources invested by the organisation and value creation that pays off for the organisation, are utilized at a significantly lower rate.

_ The narrow view and the lack of measures on the outflow level is coherent with the strong search for clear links between communication and organisational goals identified in this survey.

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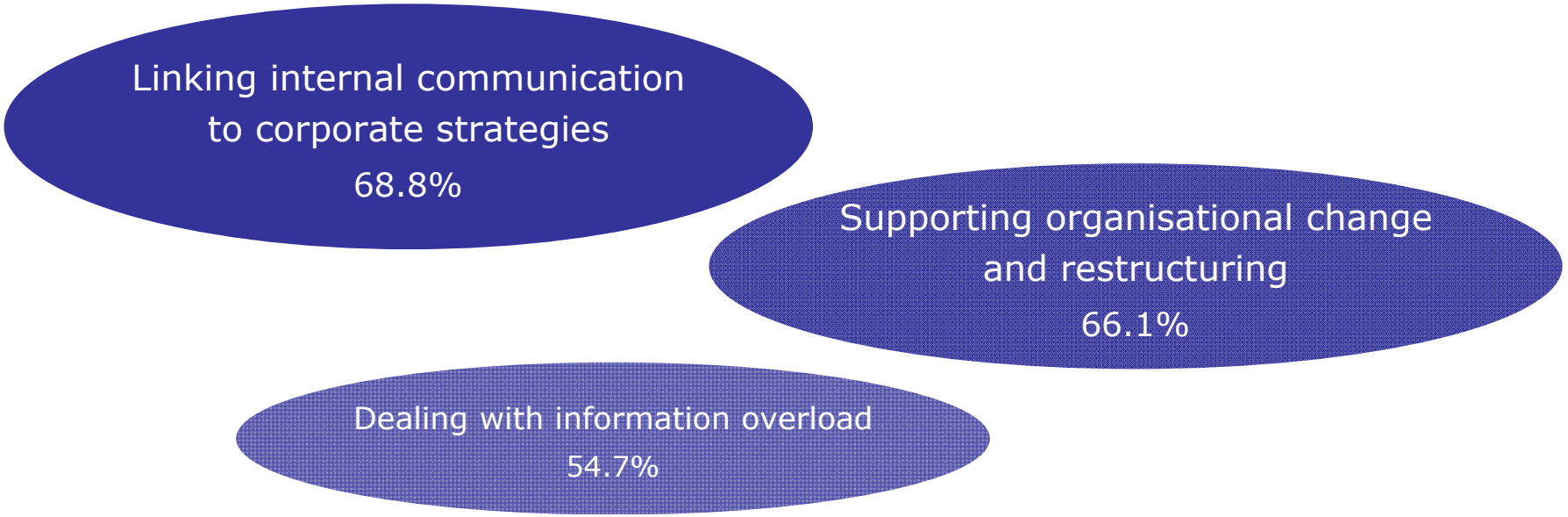
Trends in internal communication

Main challenges in internal communication over the next twelve months



Coping with the digital evolution and the social web	34.1%
Re-establishing lost credibility in management	28.7%
Avoiding reputation risks through online word-of-mouth	28.4%
Internationalisation of internal communication	19.5%

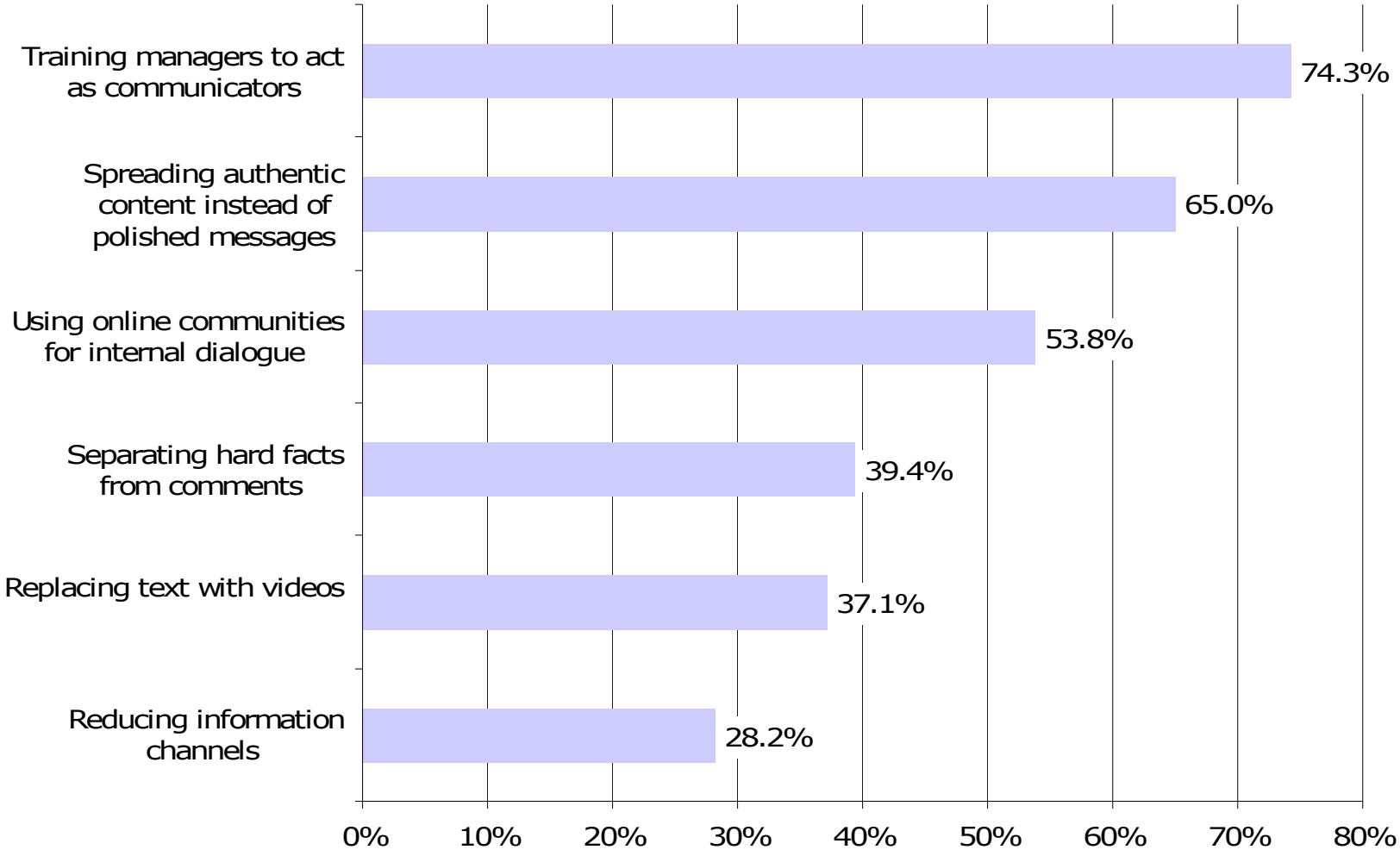
www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries;
Q 12: What are the main challenges when communicating to employees within the next 12 months? Please pick those three which are most important from your point of view (1 = not important; 5 = very important); considered scale points 1-2

Different priorities in internal communication depending on the type of organisation

	Joint stock	Private	Govern-mental	Non profit
Supporting organisational change and restructuring	70.3%	68.1%	62.9%	64.0%
Dealing with information overload	53.9%	48.5%	65.8%	64.0%
Coping with the digital evolution and the social web	27.8%	29.8%	33.8%	40.2%
Avoiding reputation risks through online word-of-mouth	25.5%	30.7%	22.4%	22.0%

www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,346 PR Professionals in communication departments;
Q 12: What are the main challenges when communicating to employees within the next 12 months? Please pick those three which are most important from your point of view (1 = not important; 5 = very important); considered scale points 1-2

Important future action in internal communication



www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals form 34 European countries;
Q 13: In implementing internal communication, do you think some of the following aspects will be relevant in the next three years? (1 = not important; 5 = very important), considered scale points 1-2

Interpretation

Two strong priorities for internal communication

_ In times of crisis, internal communication is a driver of organisational change and restructuring, demonstrating a clear link to corporate strategy. A clear two-third majority of the communication professionals interviewed picked those as the prevalent issues in internal communication for the next 12 months.

_ At the same time, 55% of respondents realize that information overload is a main problem within organisations, and put a priority on dealing with this.

_ Somewhat surprisingly, one third or even less says that dealing with the social web both proactively and defensively (avoiding reputation risks through online word-of-mouth) is one of the top issues in internal communication today. At the same time, 54% think that using online communities for internal dialogue will be important within the next three years.

_ According to an overwhelming 74% of respondents, training managers to act as communicators is the most relevant future action in internal communication, followed by spreading authentic content instead of polished messages. Both aspects are a sharp contrast to everyday practice of most communication departments and agencies, who rely on communicating themselves with an ever expanding arsenal of tools and channels.

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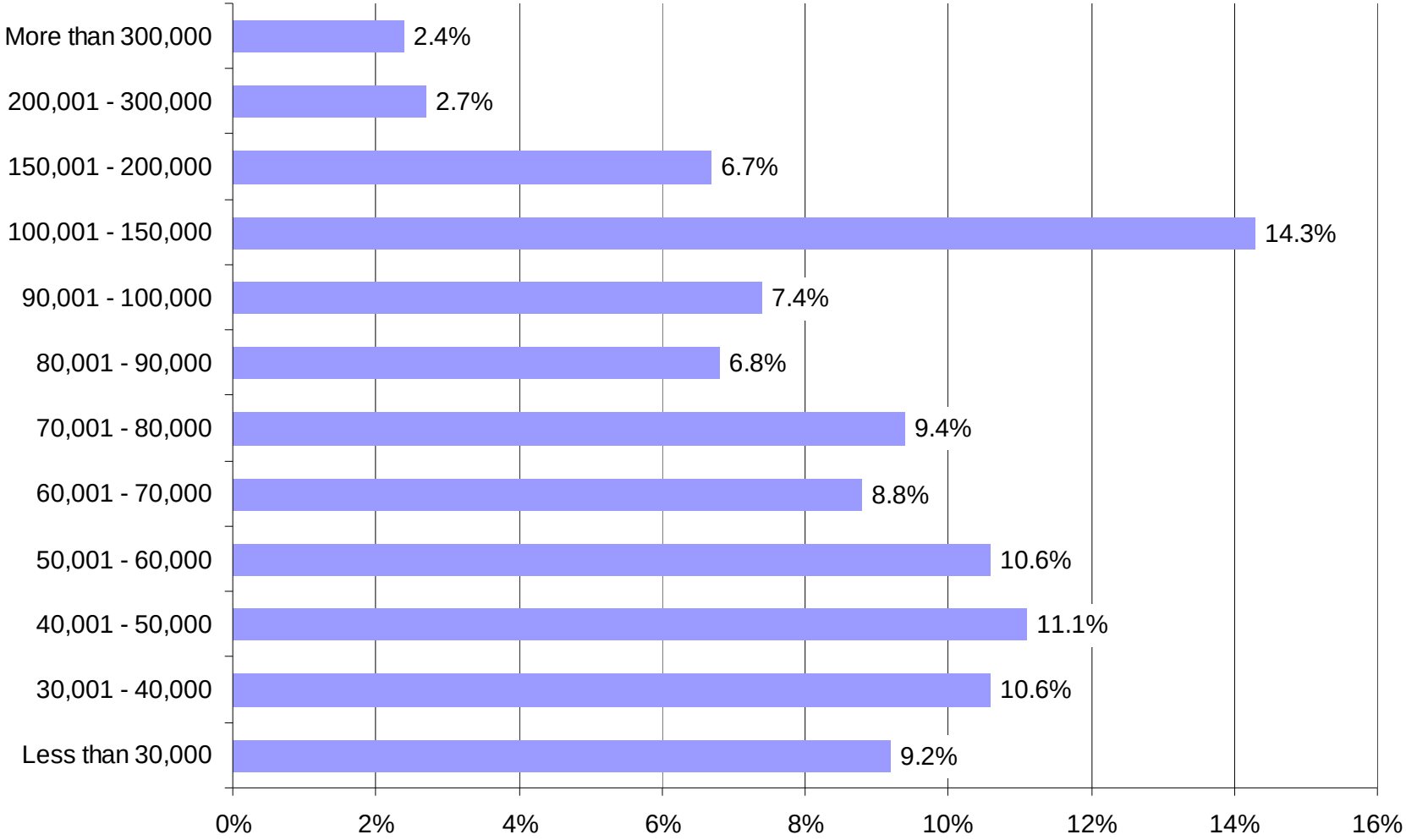
Salary and qualification needs

Basic annual salary of European PR practitioners (in Euros)

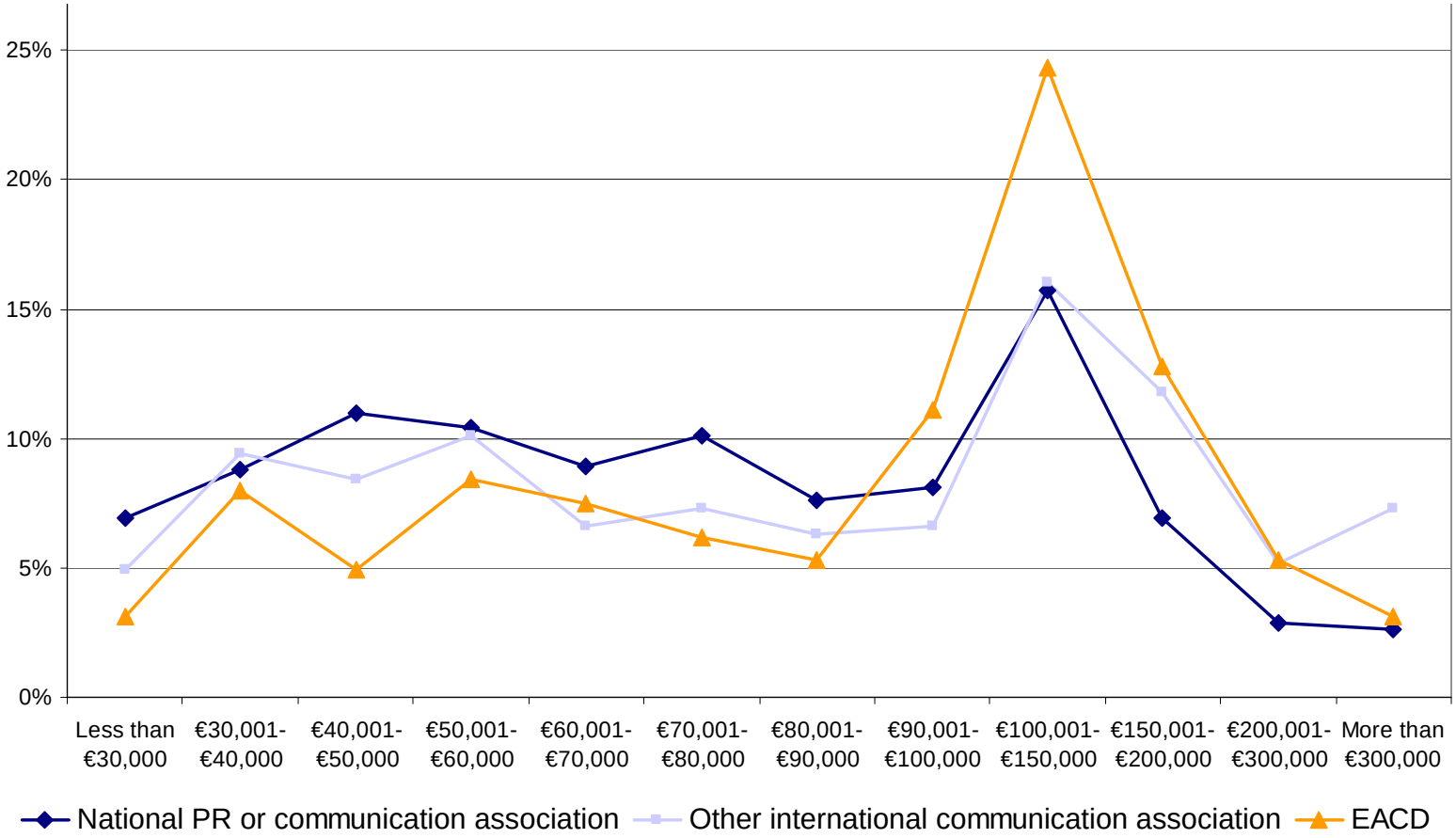


www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,768 PR Professionals from 34 European countries;
Q 17: In which of the following bands does your basic annual salary fall?

Annual salaries of male and female PR practitioners

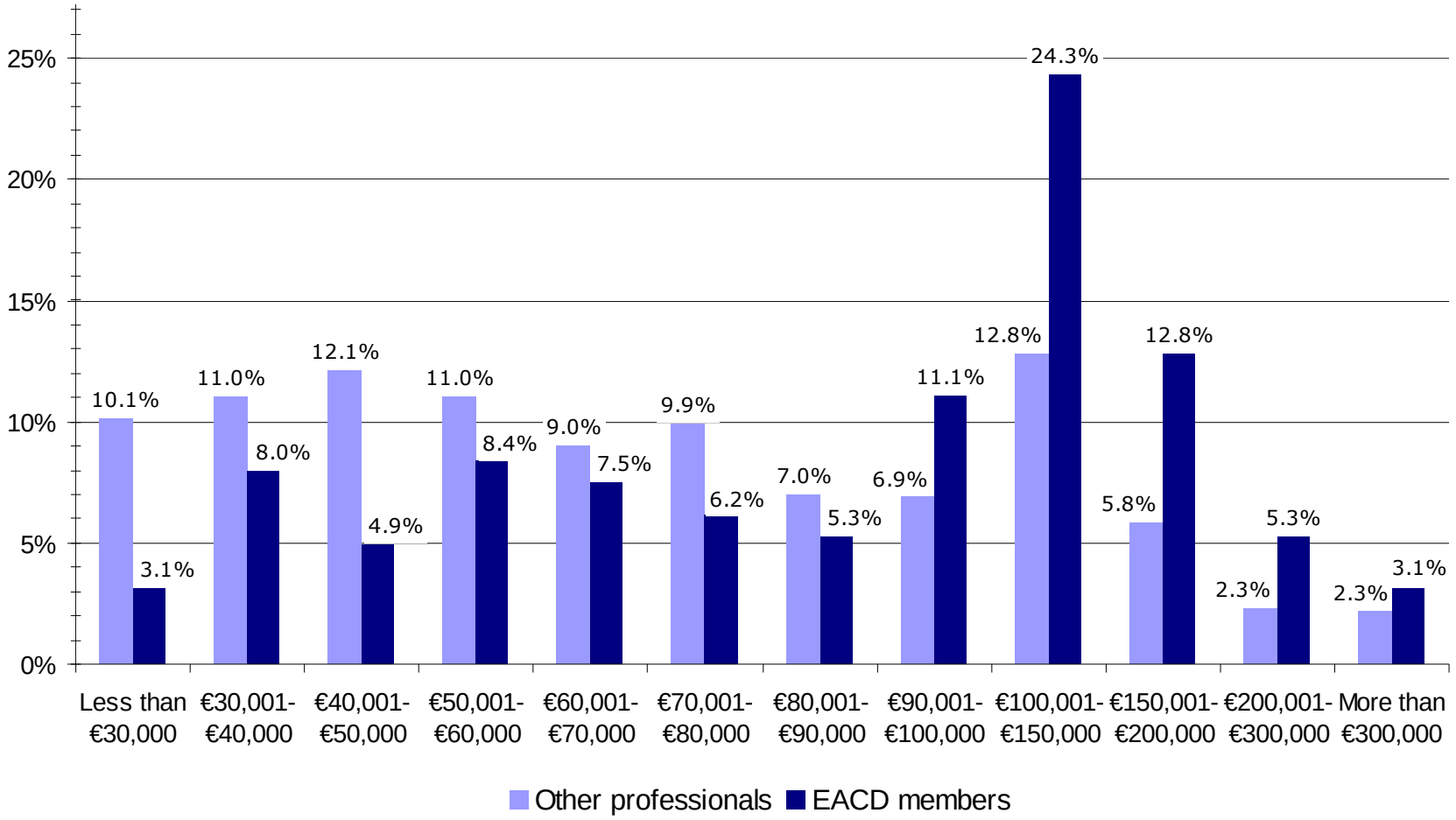
www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,768 PR Professionals from 34 European countries;
Q 17: In which of the following bands does your basic annual salary fall?; What is your gender?

Annual salary and membership in communication associations



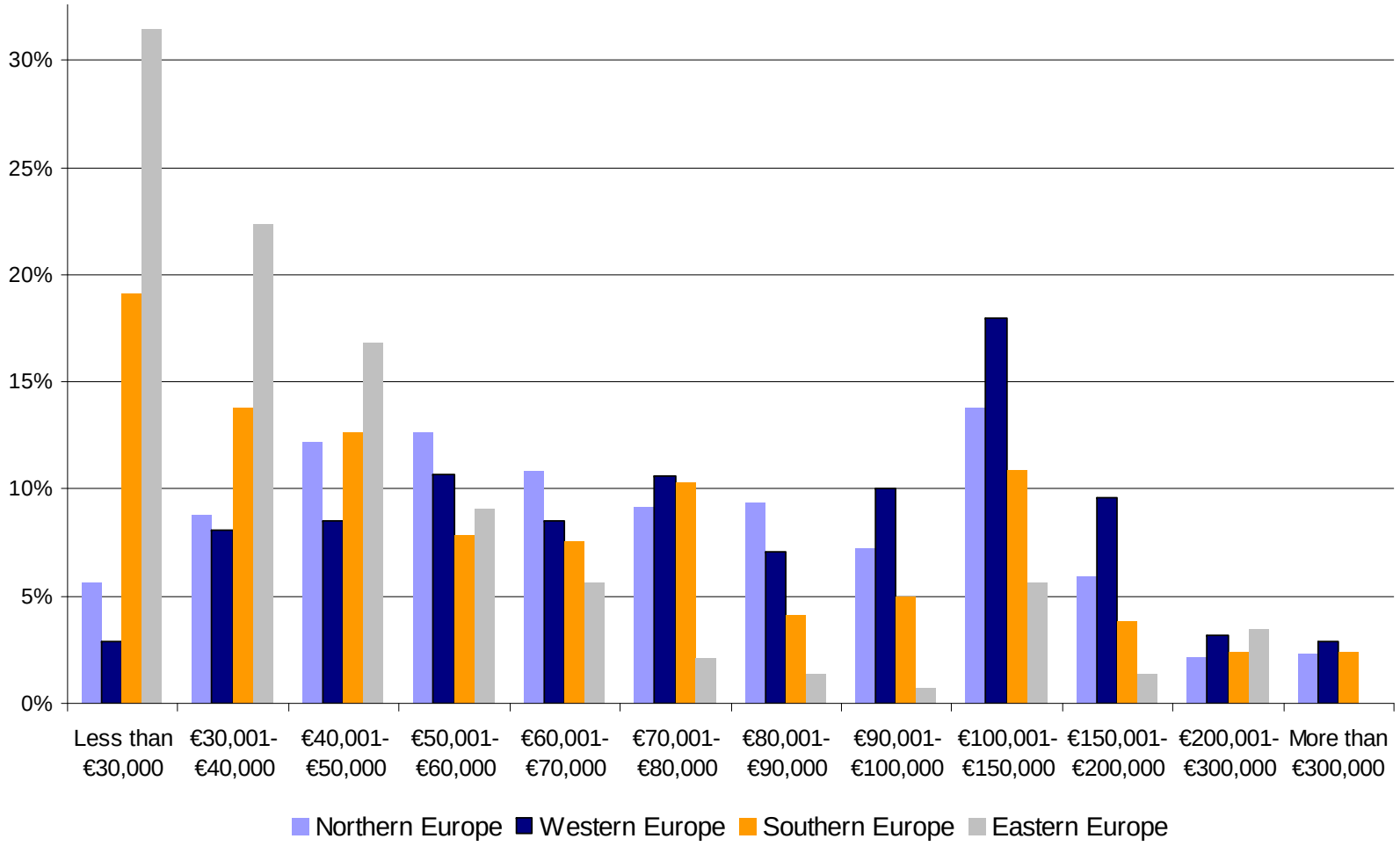
www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,768 PR Professionals from 34 European countries;
Q 17: In which of the following bands does your basic annual salary fall? Are you a member of a professional organisation?

60% of EACD members earn more than 90.000 Euros annually



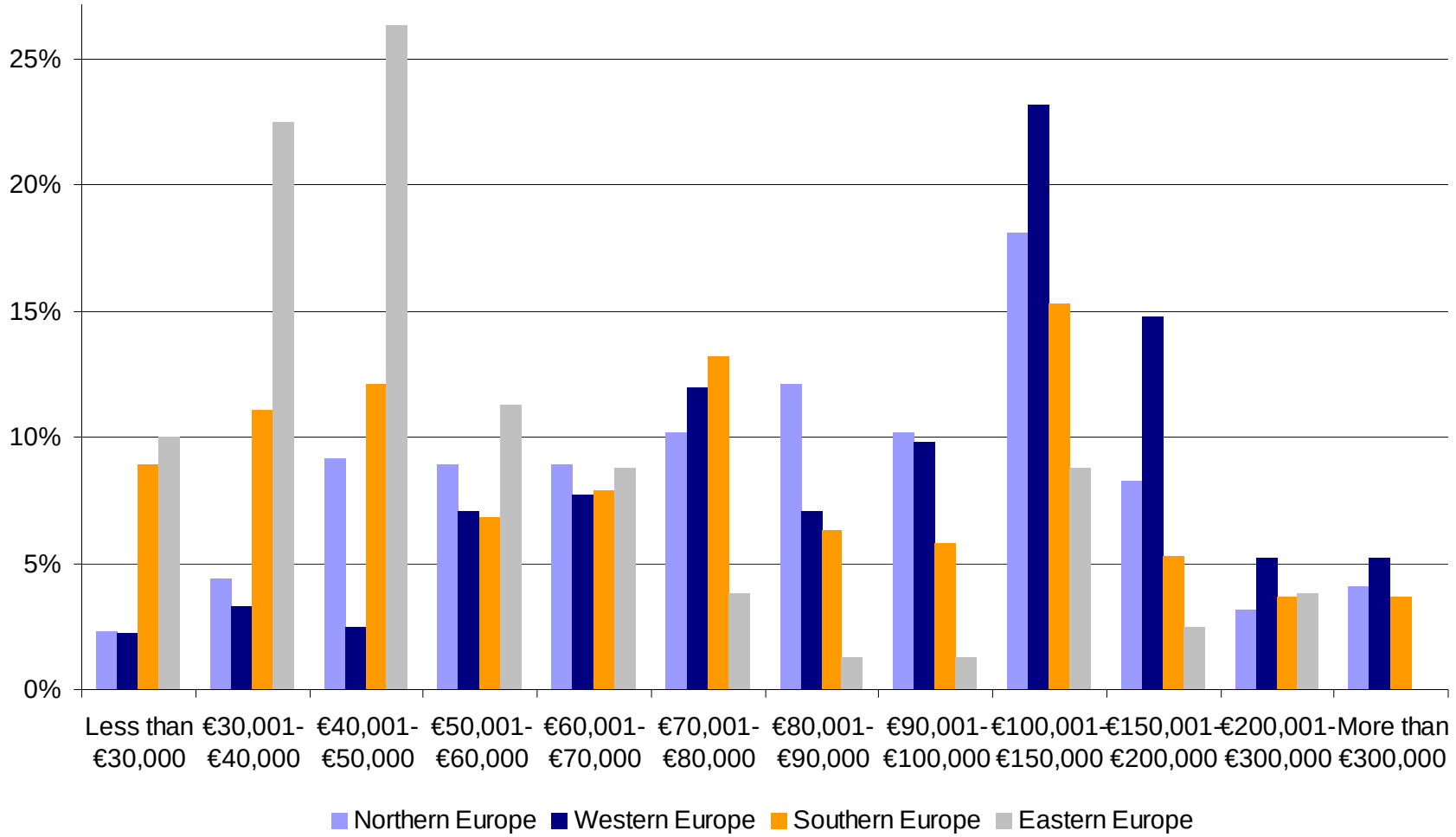
www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,768 PR Professionals from 34 European countries;
Q 17: In which of the following bands does your basic annual salary fall?; Are you a member of a professional organisation?

Annual salaries in Western Europe are significantly higher



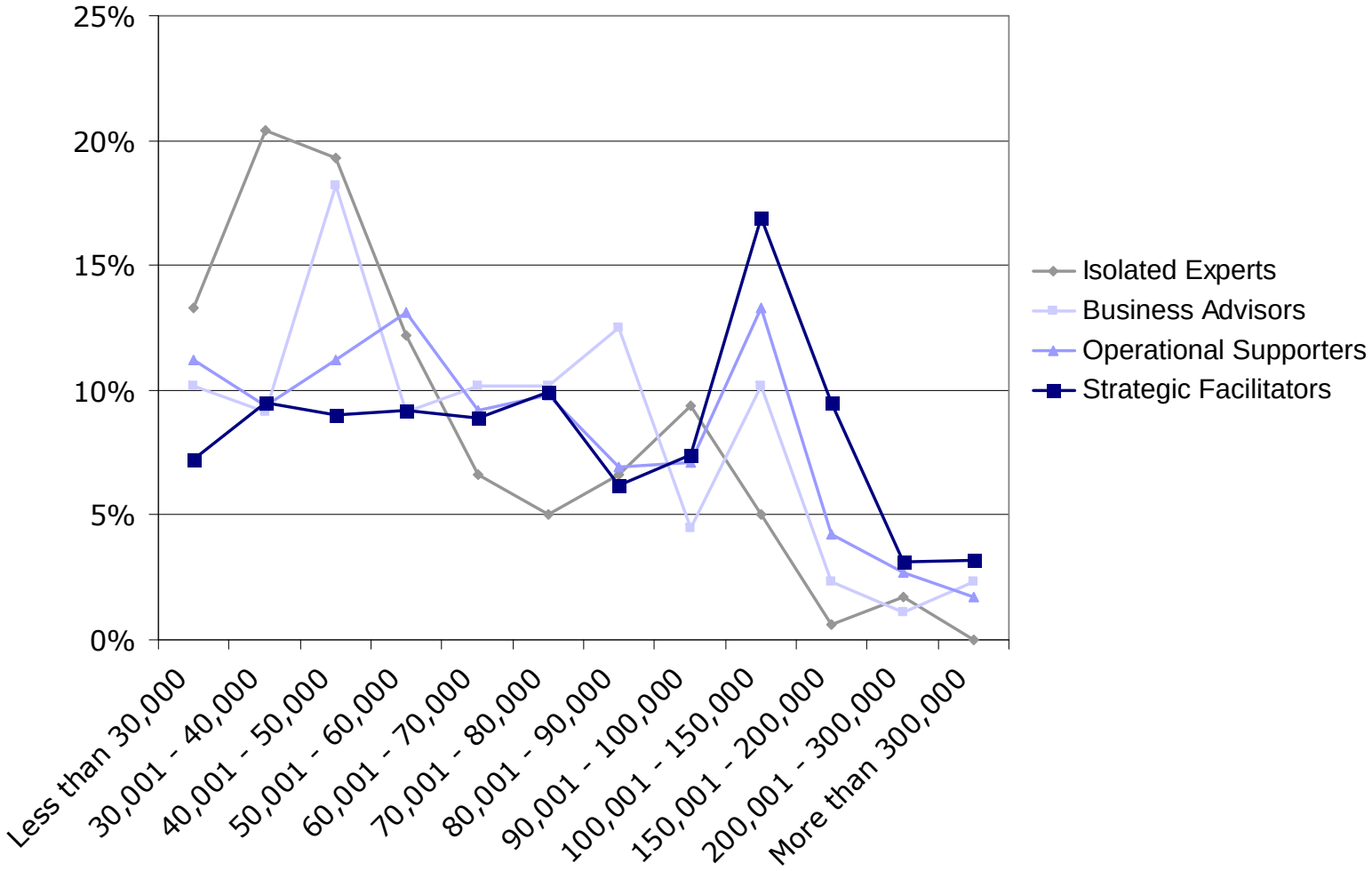
www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,768 PR Professionals from 34 European countries;
Q 17: In which of the following bands does your basic annual salary fall?

Annual salary of top level communicators in different regions (Head of communication/Agency CEO)



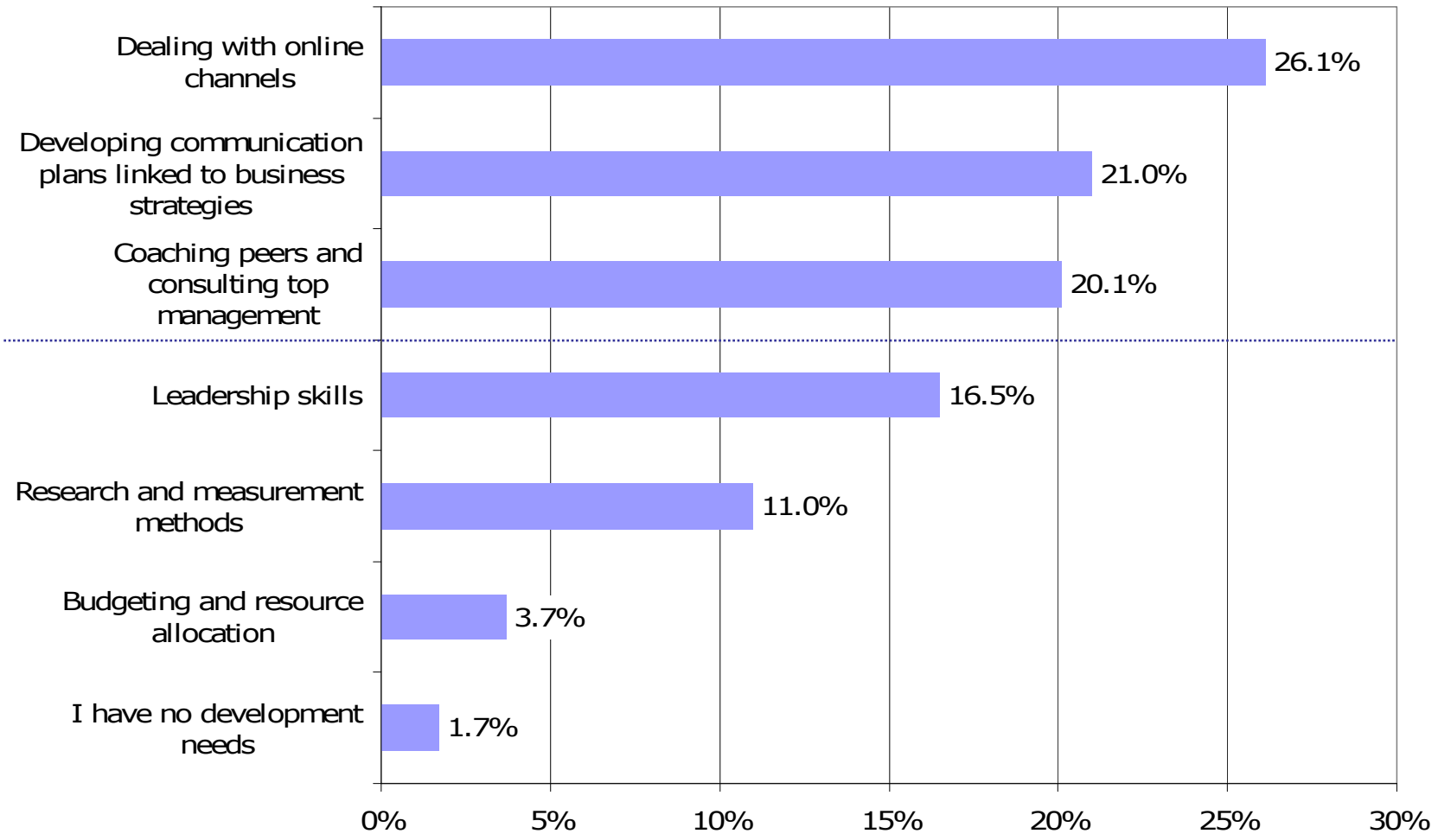
www.communicationmonitor.eu / Zerfass et al. 2009 / n = 951 PR Professionals from European countries;
Q 17: In which of the following bands does your basic annual salary fall?

Corresponding with their hierarchical status and role, professionals acting as strategic facilitators report a higher salary



www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,768 PR Professionals from 34 countries; Q 7, Q 17

Training and qualification needs of PR professionals in Europe



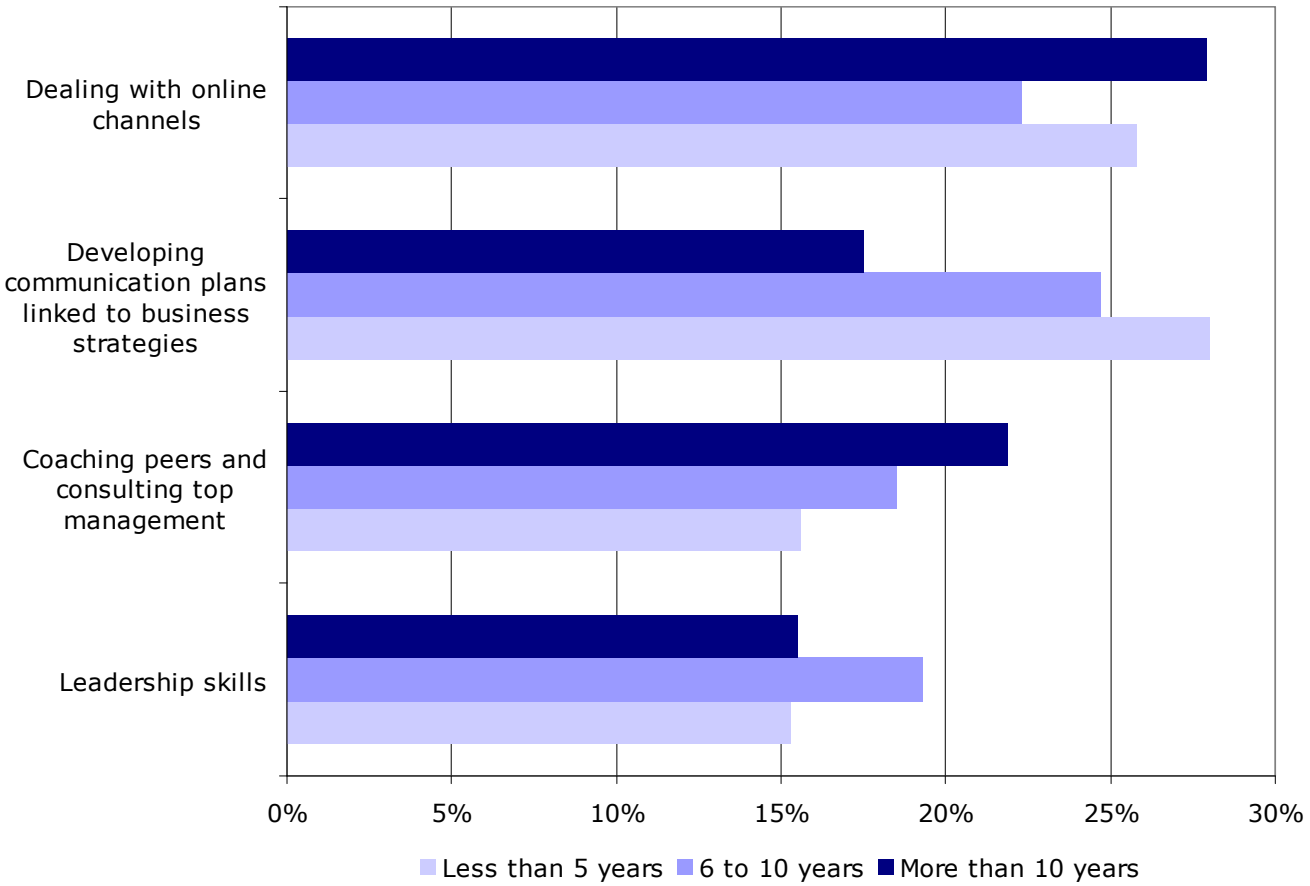
www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries; Q 14: Thinking of your own skills: if you have the right to choose one area of personal development next year, which of the following would you select?

Qualification needs related to the hierarchical position

	Head of comm./ Agency CEO	Unit leader	Team member
Dealing with online channels	28.2%	22.5%	24.6%
Developing comm. plans linked to business strategies	18.3%	24.5%	24.2%
Coaching peers and consulting top management	22.3%	16.8%	19.5%
Leadership skills	13.9%	20.0%	18.6%
Research and measurement methods	11.3%	12.1%	7.6%
Budgeting and resource allocation	3.8%	3.4%	4.2%
I have no development needs	2.2%	0.7%	1.3%

www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries; Q 14: Thinking of your own skills: if you have the right to choose one area of personal development next year, which of the following would you select?

Qualification needs related to job experience



www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries; Q 14: Thinking of your own skills: if you have the right to choose one area of personal development next year, which of the following would you select?

Training requirements of various roles

	Strategic Facilitators	Operational Supporters	Business Advisors	Isolated Experts
Dealing with online channels	26.9%	26.2%	20.4%	24.2%
Developing communication plans linked to business strategies	19.1%	23.4%	17.2%	26.3%
Coaching peers and consulting top management	20.8%	17.9%	30.1%	17.4%
Leadership skills	17.7%	16.8%	12.9%	11.1%
Research and measurement methods	11.1%	10.9%	8.6%	12.1%

www.communicationmonitor.eu / Zerfass et al. 2009 / n = 1,863 PR Professionals from 34 European countries; Q 14: Thinking of your own skills: if you have the right to choose one area of personal development next year, which of the following would you select?

Interpretation

Salary correlates with hierarchy and strategic role

_ The survey supports previous findings (EACD 2008) that salaries of communication professionals differ widely throughout Europe. Countries with a well-established occupational field in Western and Northern Europe lead the field. At the same time, women are under-represented in the higher bands of annual income, which points out that a glass ceiling still exists. Membership in international communication associations including the EACD correlates positively with a basic salary of 100.000 Euro and more.

_ Professionals enacting the „strategic facilitator" role tend to be in the top of the salary ranks, whereas a large portion of the „isolated experts" are badly paid. However, there are also some respondents with a tremendous income reporting that they neither support organisational goals by executing communication nor by advising the strategy process.

_ Consistent with data presented in other sections of this survey, three main needs for qualification have been identified: dealing with online channels (referred to by 26%), developing communication plans linked to business strategies (21%) and coaching peers and consulting top managers (20%).

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Annex

European countries and regions

Respondents are based in 34 European countries			
Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Macedonia, Malta, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, United Kingdom			
Regions (United Nations Standard Classification)			
Northern Europe (n=579)	Western Europe (n=772)	Eastern Europe (n=158)	Southern Europe (n=354)
Denmark Estonia Finland Ireland Latvia Lithuania Norway Sweden United Kingdom	Austria Belgium France Germany Luxembourg Netherlands Switzerland	Bulgaria Czech Republic Hungary Poland Romania Russia Slovakia	Croatia Cyprus Greece Italy Macedonia Malta Portugal Serbia Slovenia Spain Turkey

Classification according to United Nations Statistics Division (2008)

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