

EUROPEAN COMMUNICATION MONITOR 2013

A CHANGING LANDSCAPE – MANAGING CRISES, DIGITAL COMMUNICATION
AND CEO POSITIONING IN EUROPE. RESULTS OF A SURVEY IN 43 COUNTRIES.

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EUROPEAN COMMUNICATION MONITOR 2013

A CHANGING LANDSCAPE – MANAGING CRISES, DIGITAL COMMUNICATION
AND CEO POSITIONING IN EUROPE. RESULTS OF A SURVEY IN 43 COUNTRIES.

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

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

Imprint

Published by:

EACD European Association of Communication Directors, Brussels. www.eacd-online.eu

EUPRERA European Public Relations Education and Research Association, Brussels. www.euprera.org

Citation of this publication (APA style):

Zerfass, A., Moreno, A., Tench, R., Verčič, D., & Verhoeven, P. (2013).

European Communication Monitor 2013. A Changing Landscape – Managing Crises, Digital Communication and CEO Positioning in Europe. Results of a Survey in 43 Countries. Brussels: EACD/EUPRERA, Helios Media.

Short quotation to be used in legends (charts/graphics): *Source: European Communication Monitor 2013.*

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The report is also available as a booklet published by Helios Media, ISBN 978-3-942263-21-4.

Contact:

Please contact any member of the research team or the advisory board in your country or region if you are interested in discussing the insights of this survey or in joint research projects. Questions regarding the overall research may be directed to the lead researcher, Prof. Dr. Ansgar Zerfass, zerfass@uni-leipzig.de

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Foreword



The annual European Communication Monitor continues to provide valuable insights into the state-of-the-art in communications – this year looking, among other things, at the growing need for diversified communication strategies that address different audiences in specific ways. International communication is part of the daily business of 68 per cent of all communicators who answered this year’s questionnaire, with 73 per cent of the respondents convinced that communicating internationally will become even more important within the next three years. However, only 47 per cent believe that their organisation has solid structures in place to accommodate this challenge. As the European Association of Communication Directors (EACD), we will continue to offer peer-to-peer learning and training opportunities to help close this gap, and to support academic programmes that equip future communicators with a specifically international perspective.

Next to the challenge of communicating to a regionally diverse audience, this year’s monitor also looks at variations in addressing different generations. More than three quarters of communicators believe that the under-30 “digital native” generation is more interactive, more involved in communication and demands more feedback. According to our survey, 60 per cent of all organisations have already implemented age-specific communication strategies. However, with only 38 per cent believing that their organisation has adequate strategies and instruments to communicate with new gatekeepers on the social web, there is still clearly a strong demand for continuous training regarding communications in the social media age.

These are just a few of the main themes of this year’s monitor: I invite you to explore it in depth over the following pages. At the EACD, we continue to review the results carefully and take them as inspiration for our association’s work for the advancement of our profession.

A handwritten signature in black ink, appearing to read 'Herbert Heitmann', written in a cursive style.

Dr. Herbert Heitmann

President, European Association of Communication Directors (EACD)

Introduction



Strategic communication is an advanced management discipline which supports organisational goals and drives corporate value. A number of the most important fields of practice are researched in this survey: strategies for positioning the chief executive officer and other executives, for managing crises based on situative response approaches, for coping with the challenges of internationalisation, and for interacting with specific gatekeepers and audiences in the digital realm.

Many surveys in the field of communication management and public relations claim an international outreach. From time to time new studies enter and leave the field. The European Communication Monitor is the only continuing research worldwide that has built up an academic and professional infrastructure across 43 countries and has produced up-to-date data for seven years in a row. Insights have been disseminated in more than 60 publications in academic and professional journals, workshops and presentations around the globe.

With 2,710 communication professionals participating and country-specific analyses for 20 national markets, the ECM 2013 is the largest annual empirical survey in the field worldwide. On behalf of the research team and advisory board, I would like to thank everyone who participated in the survey as well as the broad range of national supporters. Sophia Charlotte Volk and Ronny Fechner did a great job as assistant researchers. Grit Fiedler, Vanessa Eggert and Johannes Schmid coordinated the project on behalf of our valued partners, the EACD and Communication Director magazine. Ketchum, the leading agency group on the continent, generously sponsors this joint initiative of the profession. Many thanks for this support.



Prof. Dr. Ansgar Zerfass

*Professor of Communication Management, University of Leipzig,
Germany & Executive Director, European Public Relations Education and Research Association (EUPRERA)*



Research design

Research design

The European Communication Monitor (ECM) is a unique, longitudinal transnational survey in communication management with a long tradition (Zerfass et al., 2007). It was organised for the seventh consecutive time in 2013. Owing to its depth, long-term consistency of questions and structure, as well as the consistently high and broad response rate from across Europe, this annual survey has developed into the most comprehensive research into communication management and public relations worldwide with 2,710 participating professionals in 2013 from 43 countries. Each year the ECM improves the understanding of the professional practice of communication in Europe and monitors trends in strategic communication to analyse the changing framework of the profession.

The study is conducted by a core group of five university professors, led by Professor Ansgar Zerfass from the University of Leipzig in Germany and supported by a wider professorial advisory board totalling 11 renowned universities across Europe. It is organised by the European Public Relations Education and Research Association (EUPRERA), the European Association of Communication Directors (EACD) and Communication Director magazine. This successful partnership between academia and practice is supported by Ketchum, Europe's leading public relations agency, as generous sponsor.

The research framework for the survey has been modified and expanded once again in 2013. This year it includes a large number of independent and dependent variables along five key factors: personal characteristics of communication professionals (demographics, education, job status, professional experiences); features of the organisation (structure, country); attributes of the communication function; the current situation of strategic communication as well as perceptions on key developments in areas like strategies for positioning the chief executive officer, for managing crises, for dealing with international and cross cultural issues as well as interacting with gatekeepers and audiences in the changing, complex digital world.

Cross-tabulations, correlation analyses and longitudinal comparisons enable the researchers to identify dynamics in the field. To this end, several questions from previous ECM surveys (Zerfass et al., 2012, 2011, 2010, 2009, 2008) have been repeated.

The monitor is based on a wide range of situational theories about public relations and communication management. The empirical character of the study enables the profession to strengthen certain theoretical concepts in the field or reject them on the basis of the hypotheses formulated in the monitor project (e. g. Verhoeven et al., 2011). Examples of the conceptual background of this year's edition are the theories and empirical debates on social media skills and their deficits (Tench et al., 2013), intercultural communication and competence (Verčič, 2013; Bücken & Poutsma, 2010), corporate communications (Van Riel & Fombrun, 2007; Zerfass, 2008; Cornelissen, 2011), strategic communication (Hallahan et al., 2007; Holtzhausen & Zerfass, 2013) and strategic crisis communication (Coombs, 2010, 2012).



Methodology and demographics

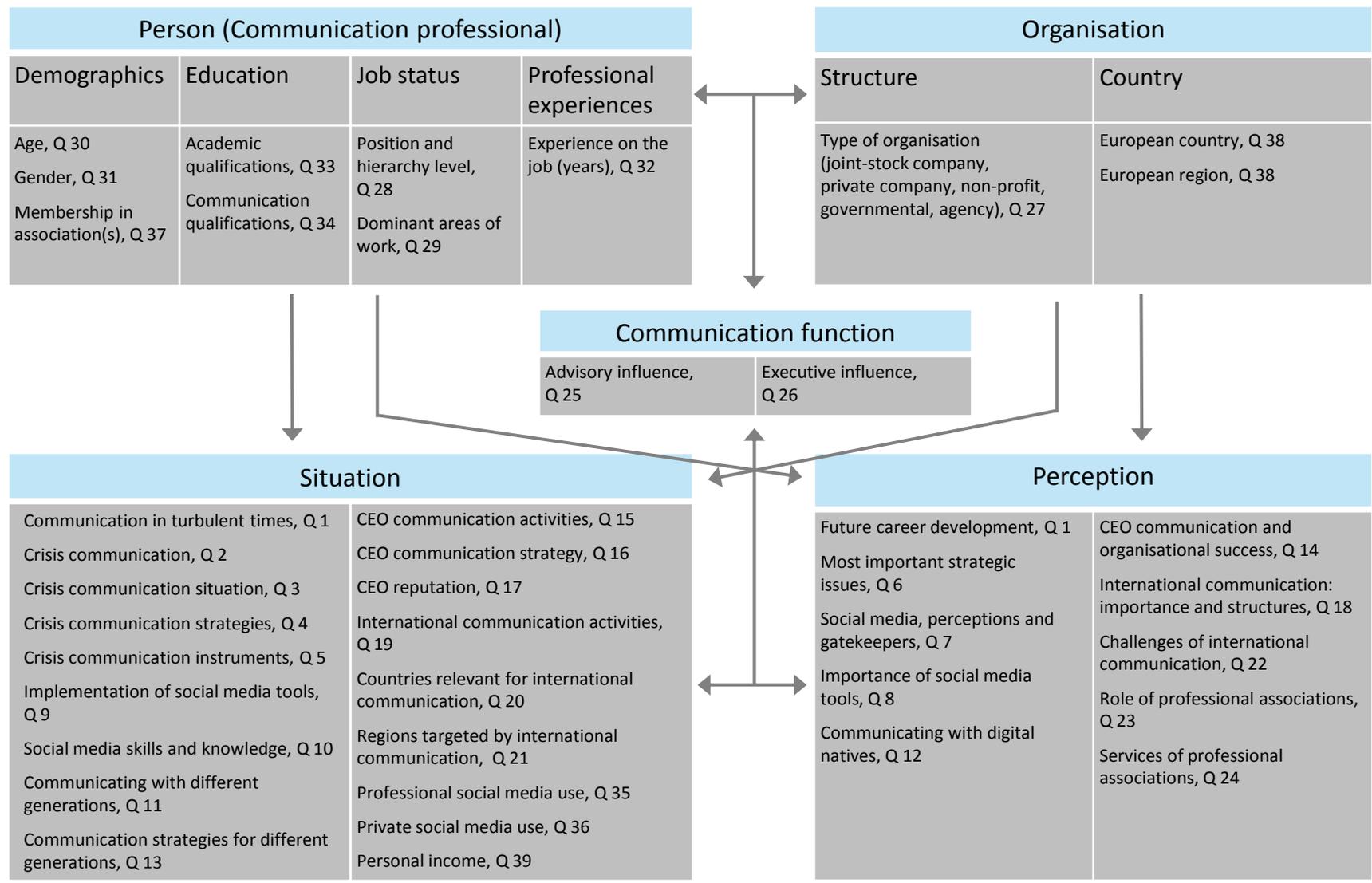
Chapter overview

This edition of the European Communication Monitor consisted of a questionnaire with 18 sections and 39 questions, based on hypotheses and instruments derived from previous research and literature. A pre-test with 36 practitioners in 13 European countries was held before the English language survey was launched in March 2013 and was online for four weeks. A personal invitation was sent to 30,000+ professionals throughout Europe via e-mail based on a database provided by the European Association of Communication Directors (EACD). Via national branch associations and networks additional invitations were distributed. 4,808 respondents started the survey and 2,802 of them completed it. The evaluation is then based on 2,710 fully completed replies by participants that were clearly identified as part of the population, being communication professionals in Europe. For the statistical analysis the Statistical Package for the Social Sciences (SPSS) was used for descriptive and analytical purposes. The results have been statistically tested with, depending on the variable, Pearson's chi-square tests (χ^2), Spearman's rank correlation tests (rho), Kendall's rank correlation (tau b), Cramér's V, and independent samples T-tests. The results are classified as significant ($p \leq 0.05$)* or highly significant ($p \leq 0.01$)** in the graphics and tables where appropriate. The significant correlations are also marked in the footnotes.

The demographics show that 43.2 per cent of the respondents hold a position as communication manager or as CEO of a communication consultancy. 28.4 per cent are responsible for a single communication discipline or are unit leaders and 22.5 per cent are team members or consultants. 58.3 per cent of the professionals interviewed have more than ten years of experience in communication management, 58 per cent of them are female and the average age is 40.9 years. A vast majority (92.8 per cent) of the respondents has an academic degree from a professional bachelor to a doctorate. Almost three out of four work in communication departments in organisations (joint stock companies, 26.2 per cent; private companies, 18.9 per cent; government-owned, public sector, political organisations, 16.3 per cent; non-profit organisations, associations, 13.4 per cent), and 25.2 per cent of the respondents are communication consultants working freelance or for agencies and consultancies.

Most respondents (35.3 per cent) are based in Western Europe (countries like Germany, Netherlands, France), followed by Northern Europe (26.2 per cent, countries like Norway, Sweden, United Kingdom), Southern Europe (24.5 per cent, countries like Italy, Spain, Croatia), and Eastern Europe (14.1 per cent, countries like Poland, Czech Republic, Romania). In the survey, the universe of 50 European countries is based on the official list of European Countries by the European Union. Countries are assigned to regions according to the official classification of the United Nations Statistics Division. Respondents from countries that are not included in the UN classification or from countries that are assigned to Western Asia were collated like adjacent nations. No respondents were registered for this survey from Andorra, Azerbaijan, Belarus, Liechtenstein, Monaco, San Marino and Vatican City. Respondents of the survey are based in 43 European countries.

Research framework and questions



Demographic background of participants

Position

Head of communication, Agency CEO	43.2%
Responsible for single communication discipline, Unit leader	28.4%
Team member, Consultant	22.5%
Other	5.9%

Organisation

Communication department	} 74.8%	
▪ joint stock company		26.2%
▪ private company		18.9%
▪ government-owned, public sector, political organisation		16.3%
▪ non-profit organisation, association	13.4%	
Communication consultancy, PR agency, Freelance consultant		25.2%

Job experience

More than 10 years	58.3%
6 to 10 years	25.5%
Up to 5 years	16.1%

Gender / Age

Female	58.0%
Male	42.0%
Age (on average)	40.9 years

Countries and regions represented in the study

Respondents are based in 43 European countries and four regions

Northern Europe 26.2% (n = 709)	Western Europe 35.3% (n = 957)	Eastern Europe 14.1% (n = 381)	Southern Europe 24.5% (n = 663)
Denmark Estonia Finland Iceland Ireland Latvia Lithuania Norway Sweden United Kingdom	Austria Belgium France Germany Luxembourg Netherlands Switzerland	Armenia** Bulgaria Czech Republic Georgia** Hungary Moldova Poland Romania Russia Slovakia Ukraine	Albania Bosnia and Herzegovina Croatia Cyprus** Greece Italy Macedonia Malta Montenegro Kosovo* Portugal Serbia Slovenia Spain Turkey**

www.communicationmonitor.eu / Zerfass et al. 2013 / n = 2,710 PR professionals. Q 38: In which European state are you normally based? In this survey, the universe of 50 European countries is based on the official country list by the European Union (http://europa.eu/abc/european_countries). Countries are assigned to regions according to the official classification of the United Nations Statistics Division (2013). Countries marked * are not included in the UN classification; countries marked ** are assigned to Western Asia. These countries were collated like adjacent nations. No respondents were registered for this survey from Andorra, Azerbaijan**, Belarus, Liechtenstein, Monaco, San Marino, Vatican City.

Personal background of respondents

Communication qualifications

▪ Academic degree in communication (Bachelor, Master, Doctorate)	48.4%
▪ Professional certificate in public relations / communication management	24.5%
▪ Professional certificate in other communication discipline	16.0%

Highest academic educational qualification

▪ Doctorate (Ph.D., Dr.)	6.4%
▪ Master (M.A., M.Sc., Mag., M.B.A.), Diploma	59.9%
▪ Bachelor (B.A., B.Sc.)	26.5%
▪ No academic degree	7.2%

Membership in a professional organisation

▪ EACD	13.5%
▪ Other international communication association	12.7%
▪ National PR or communication association	51.3%



CEO communication and reputation

Chapter overview

For many corporate and strategic communicators, their key role and function is to support and work with the highest representative of their organisation, i.e. the chief executive officer (CEO), president or general manager. Charisma, reputation and symbolic power of the CEO can have positive effects on corporate reputation, organizational effectiveness and stock recommendations by financial analysts (Pollach & Kerbler, 2011). Both the reputation and communicative abilities of the CEO have been identified as important assets in challenging situations like corporate crises (Sohn & Lariscy, 2012). Competencies and awareness for strategic communication among top executives are as important as positioning strategies created and delivered by communication professionals.

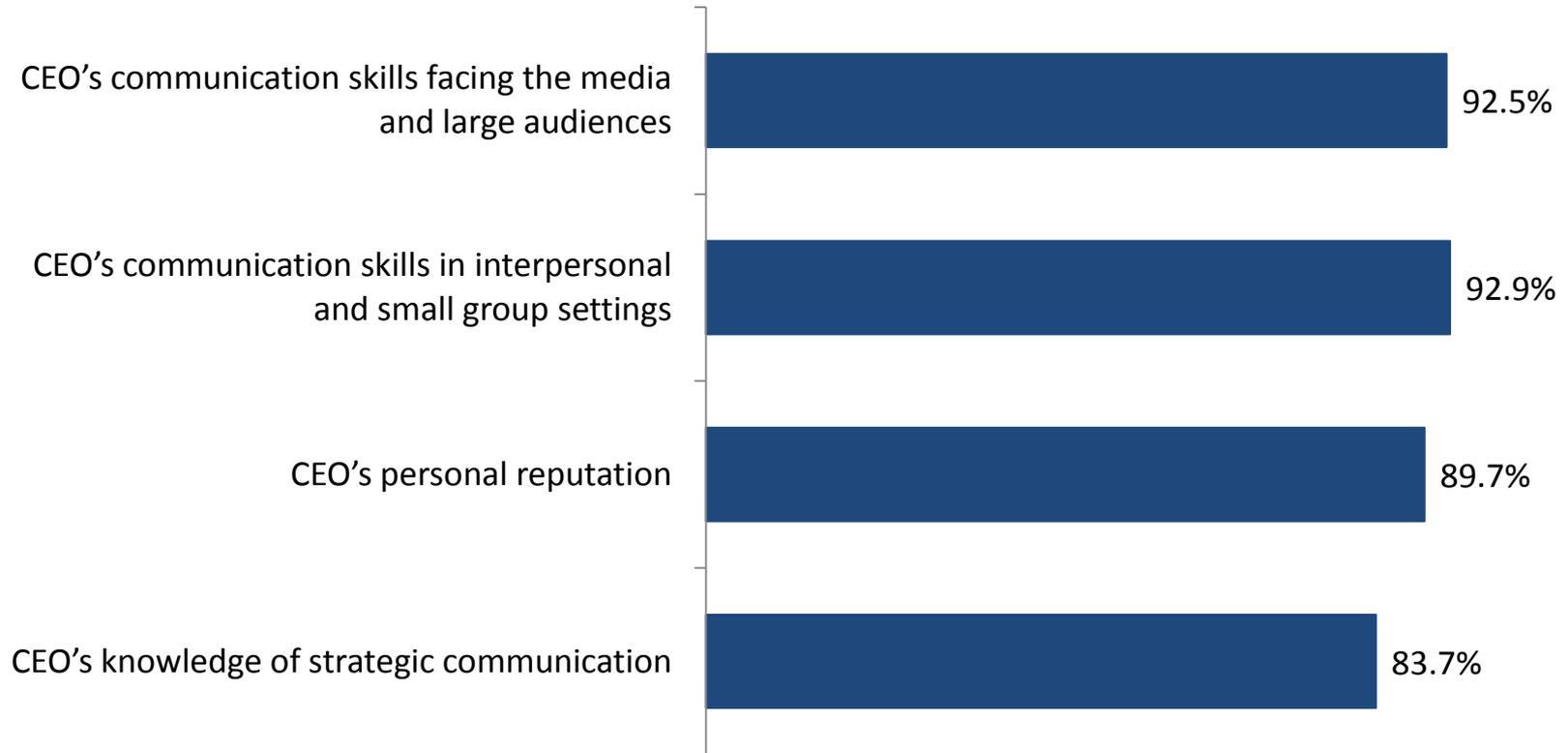
The ECM 2013 clearly identifies the importance of the CEO's communicative capabilities to deliver key messages on behalf of the organisation. Strong agreement was recorded from the respondents on the importance of communicative assets of top executives. The two most recognised were the CEO's communication skills facing the media and large audiences (92.5 per cent) and within small group settings (92.9 per cent). Interestingly, knowledge of strategic communication was rated lower at 83.7 per cent. This resembles insights from a recent study among CEOs, who tend to value the impact of their own communication activities on organisational success higher than the work of communication departments and agencies (Zerfass et al., 2013).

Despite the relevance of the CEO, every second organisation in Europe has not established any monitoring routines to evaluate the reputation of its highest representative. This lack of analysis might explain why only 76.9 per cent try to position their CEO within the public sphere, i.e. by defining an image profile and key topics. An even lower number tries to support this positioning by defining specific communication strategies (57.1 per cent) or instruments (58.6 per cent) for the CEO. When these activities are broken down by organisational type it becomes clear that communication departments in joint stock companies pursue CEO communication significantly stronger than private, governmental or non-profit organisations. The rationale for this is the importance of CEO reputation in financial communications and internal communications – two topics which are significantly more relevant for listed companies compared to other organisations, as the data shows. There is also a remarkable difference among the practice of CEO communication in various European countries. CEO positioning is most commonly found in the United Kingdom, Austria, Germany, the Czech Republic and Denmark, whereas it is less relevant in Belgium, Portugal, Italy, Serbia and Croatia. The awareness or appraisal of leadership and leaders in different cultures has to be taken into account.

Many communication professionals who try to position their CEO do so by emphasising his or her functional competencies, namely that they are capable and have the skills to fulfil their role as head of the organisation (32.5 per cent). Nearly as important are approaches which focus on ethical aspects (28.4 per cent) or cognitive competencies (26.5 per cent). Personal dimensions of the CEO like behaving appropriately and being smart are less often used in strategic communication (12.7 per cent).

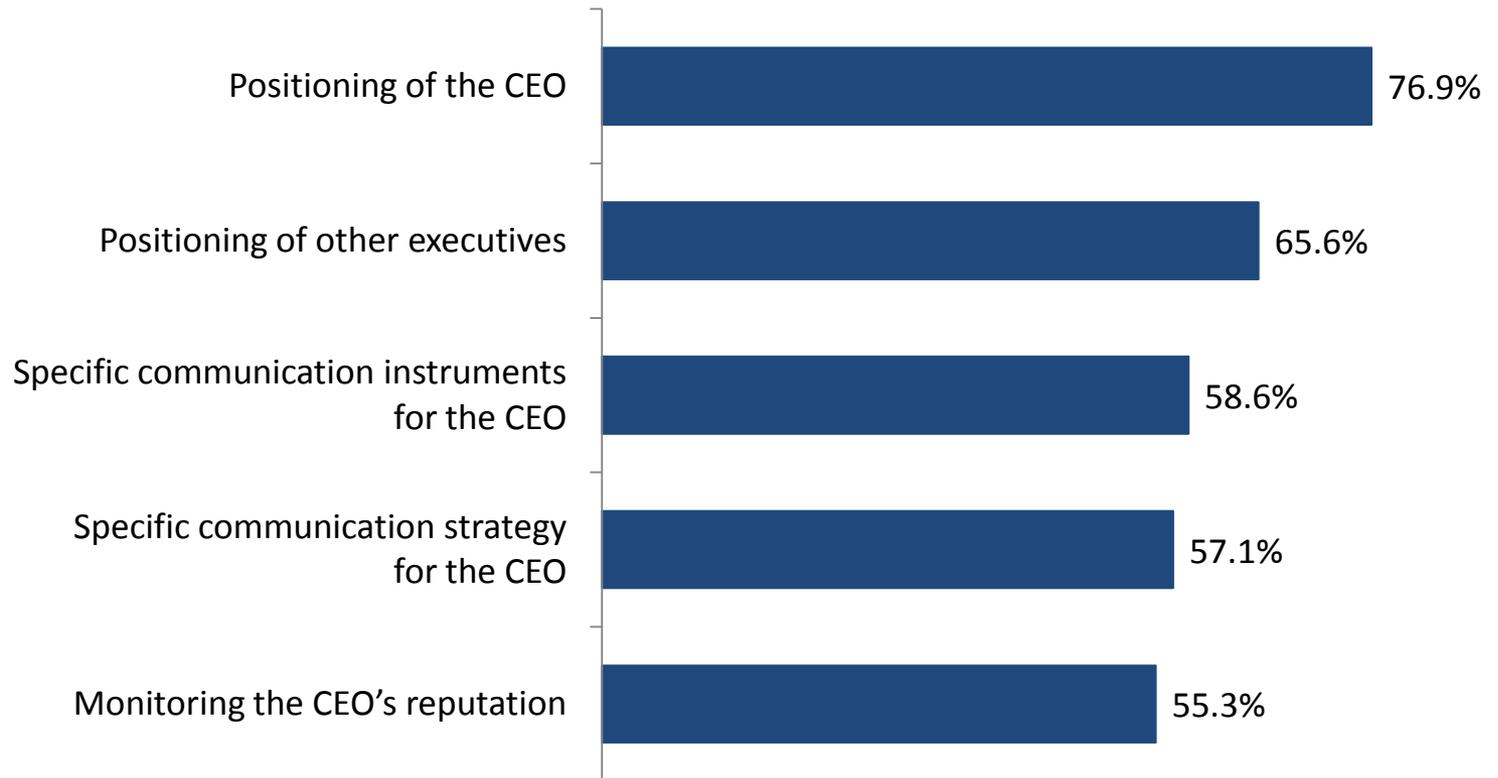
Communicative assets of the CEO have a major impact on organisational success

Important factors for the overall success of an organisation

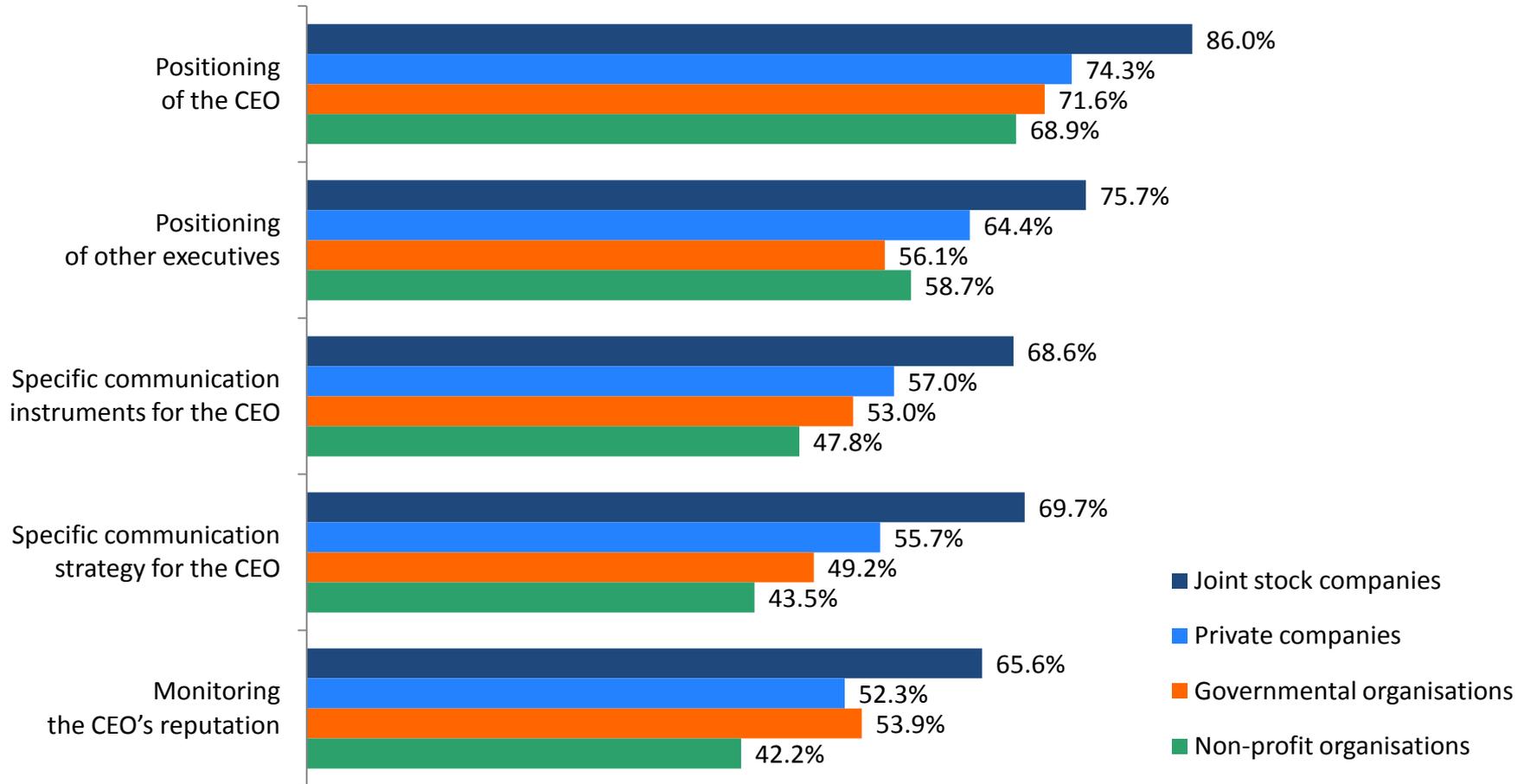


Practice of CEO and executive communication

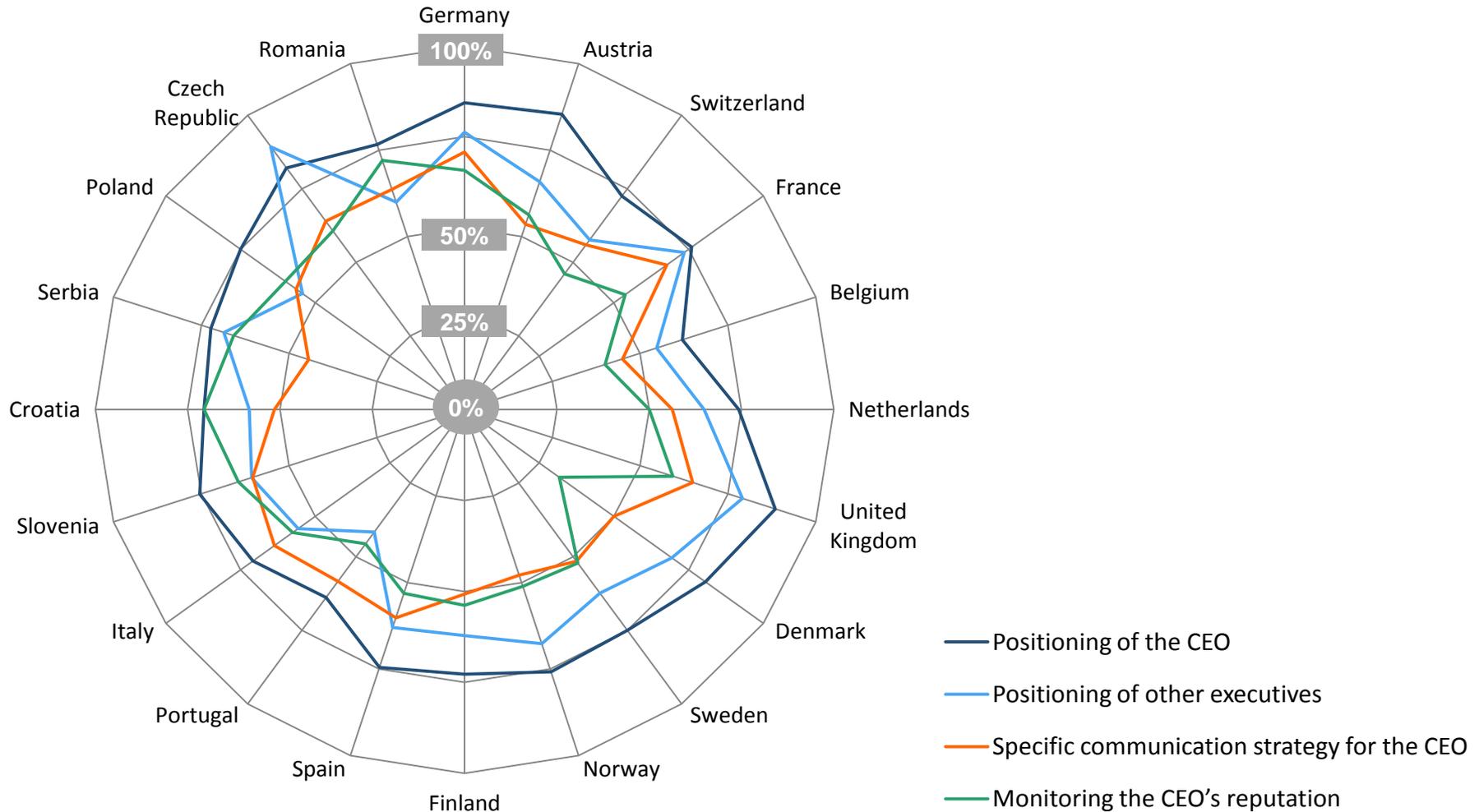
CEO / executive communication activities pursued by communication departments



CEO and executive communication activities in different types of organisations



Country-by-country comparison: CEO positioning is most common in the United Kingdom, Austria, Germany, the Czech Republic and Denmark



Dominant approaches in CEO positioning and communication

Dimensions at the centre of the positioning and communication strategy for the CEO



Depending on the type of organisation, CEO reputation is most relevant in different areas of strategic communication

	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations	<i>Overall</i>
Marketing communications	7.0%	17.3%	3.1%	7.4%	8.8%
Financial communications	29.3%	12.4%	3.7%	2.9%	15.5%
Internal communications	20.9%	25.8%	15.9%	17.2%	20.5%
Political communication	15.7%	22.3%	26.4%	25.0%	21.1%
Public and community relations	12.9%	12.4%	39.7%	38.5%	22.4%
Crisis communications	14.1%	9.9%	11.2%	9.0%	11.6%

www.communicationmonitor.eu / Zerfass et al. 2013 / n = 1,444 PR professionals in communication departments using CEO positioning or specific CEO communication strategies. Q 17: What was the most important communicative situation for your organisation during the last 12 months, in which the reputation of the CEO was crucial for success? It was in the area of ... (marketing, financial, ... communications). Highly significant correlations for all items (chi-square test, $p \leq 0.01$, Cramers V = 0.262).



Digital gatekeepers and social media communication

Chapter overview

The majority of communication professionals in Europe think that social media influence the perceptions of the organisation and the construction of reality by the use of this type of media. Almost three quarters (72.5 per cent) of the professionals think that social media content changes the perceptions of external stakeholders about the organisation and 57 per cent perceive this to be true for employees. Six out of ten respondents say that monitoring social media changes their own perception of stakeholders and other organisations. These results show that social media seem to work in two directions: inside-out and outside-in.

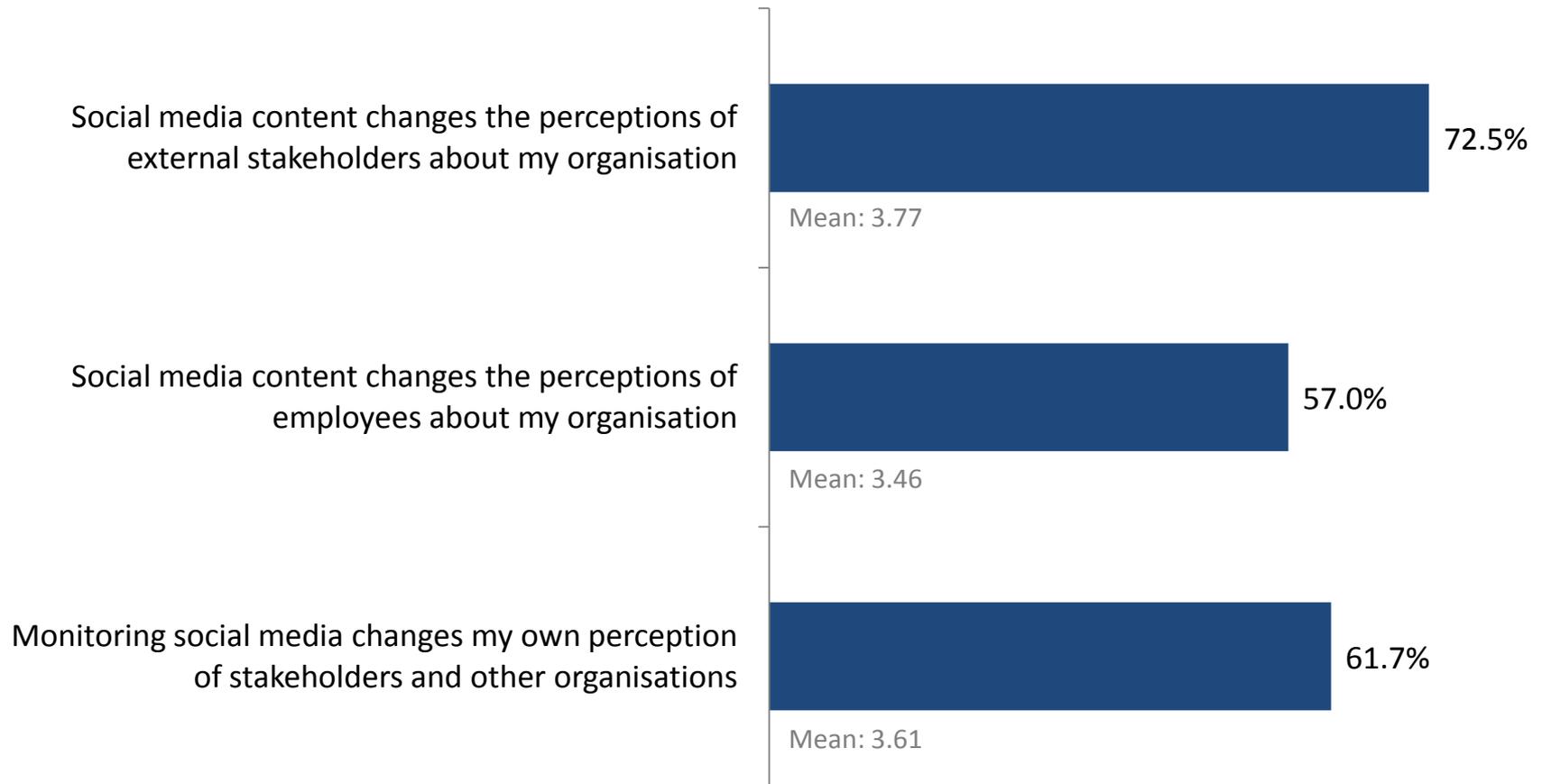
Furthermore, the majority of the professionals think of employees, consumers, bloggers and online community managers as relevant gatekeepers for their organisation. Employees who are very active on social media are perceived as most important (58.1 per cent), followed by consumers who raise their voice on social media (53.2 per cent), and bloggers and online community managers (51.4 per cent). However, adequate communication strategies and instruments to deal with new gatekeepers on the social web are underdeveloped. Only 37.7 per cent of the European professionals state that their organisation has developed adequate policies. The difference between the perception of the effects of social media on stakeholders seems to be in line with the so-called third person effect for media effects (Davison, 1983, 1996). This theory underlines the difference between real and perceived effects of media. It explains why people tend to overestimate the influence of media on the attitudes and behaviours of others and not on themselves.

There are weak but significant correlations between the use of social media by communication professionals themselves (professional as well as private) and the perceived influence of social media on perception changes, on stakeholder relevance and the development of communication strategies for social media. Those who are more active are more aware of the challenges and also their organisations are working on it more often.

The five most important social media communication tools for European professionals are social networks or online communities, online videos, mobile applications like apps or mobile webs, micro blogs (i.e. Twitter), and photo sharing. The list is almost the same like one year ago (Zerfass et al., 2012: 64), with the exception of photo sharing applications which have ruled out weblogs and entered the top 5 for the first time. However, there are significant differences in importance for some channels across Europe. For example, weblogs are higher appreciated in Romania, Spain, the United Kingdom, Finland and Germany. Photo sharing plays a major role in Eastern and South Eastern Europe, compared to many Northern and Western European countries. For all social media there is a gap between the perceived importance by communication professionals and the actual implementation of the platforms by their organisation. This gap is biggest for mobile applications (30.2 per cent). Implementing mobile media therefore continues to be the key challenge for strategic communication.

The perceived importance of social media is not growing anymore if we compare the current results to previous years, indicating that social media indeed are merging in the media mix of organisations. This is the first time the topic has shown no future growth since it was first introduced in the ECM in 2008. The results show that social media have to be discussed as an integral part of communication management (Duhé, 2012; Zerfass & Pleil, 2012; Tench & Yeomans, 2013).

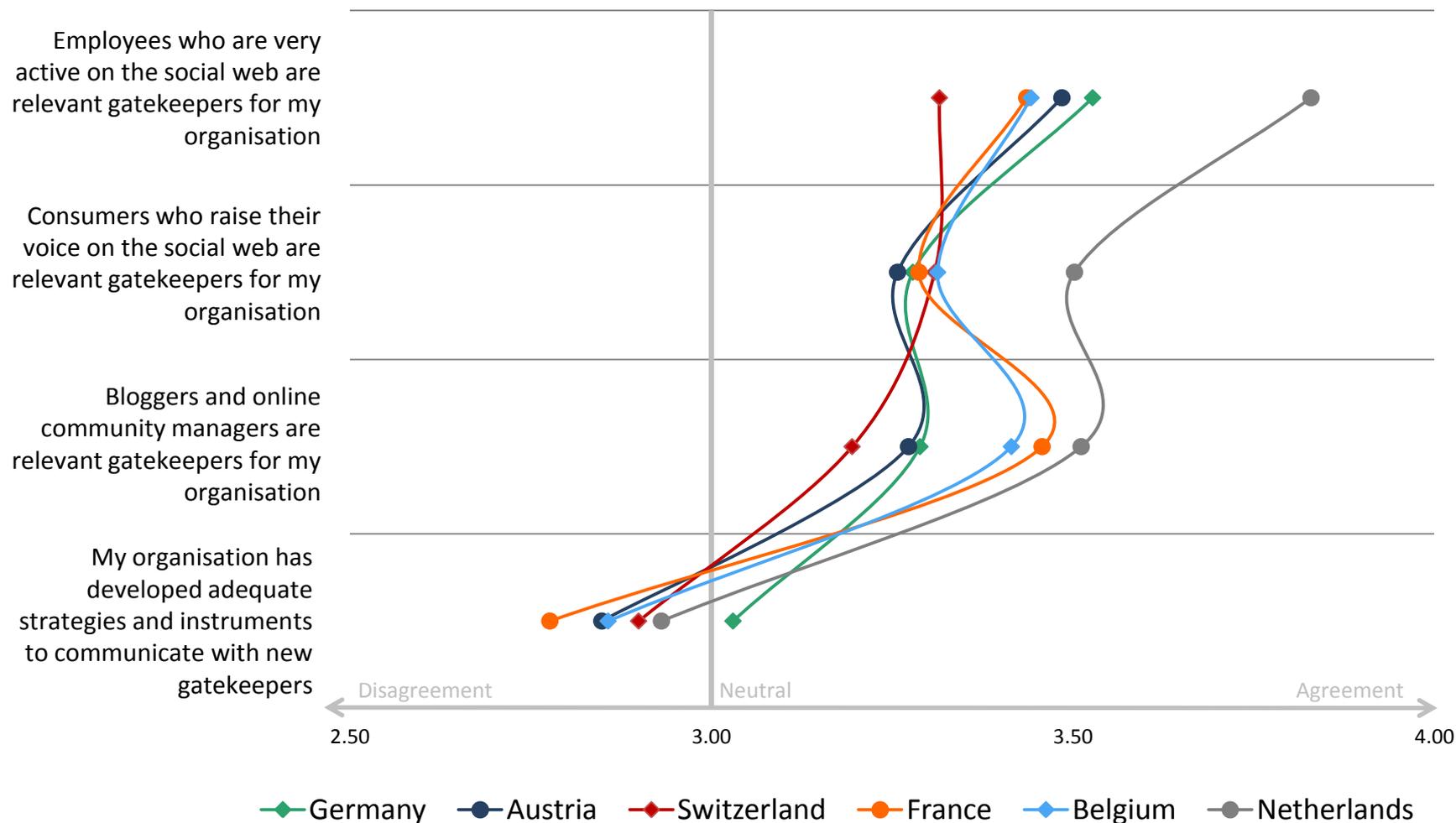
How social media influences organisational perceptions and construction of reality



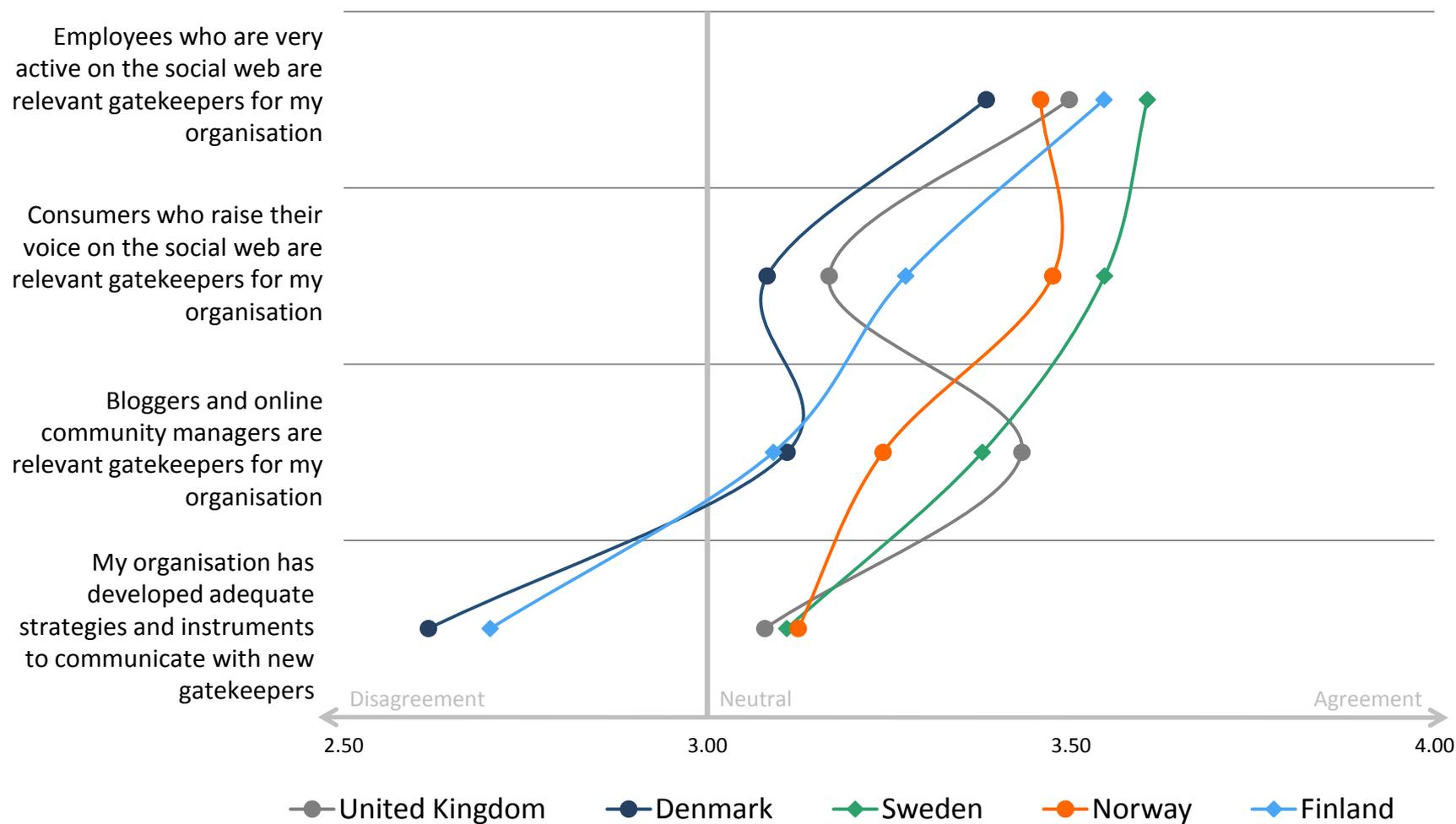
Digital gatekeepers on the social web: Perceived relevance and communication strategies



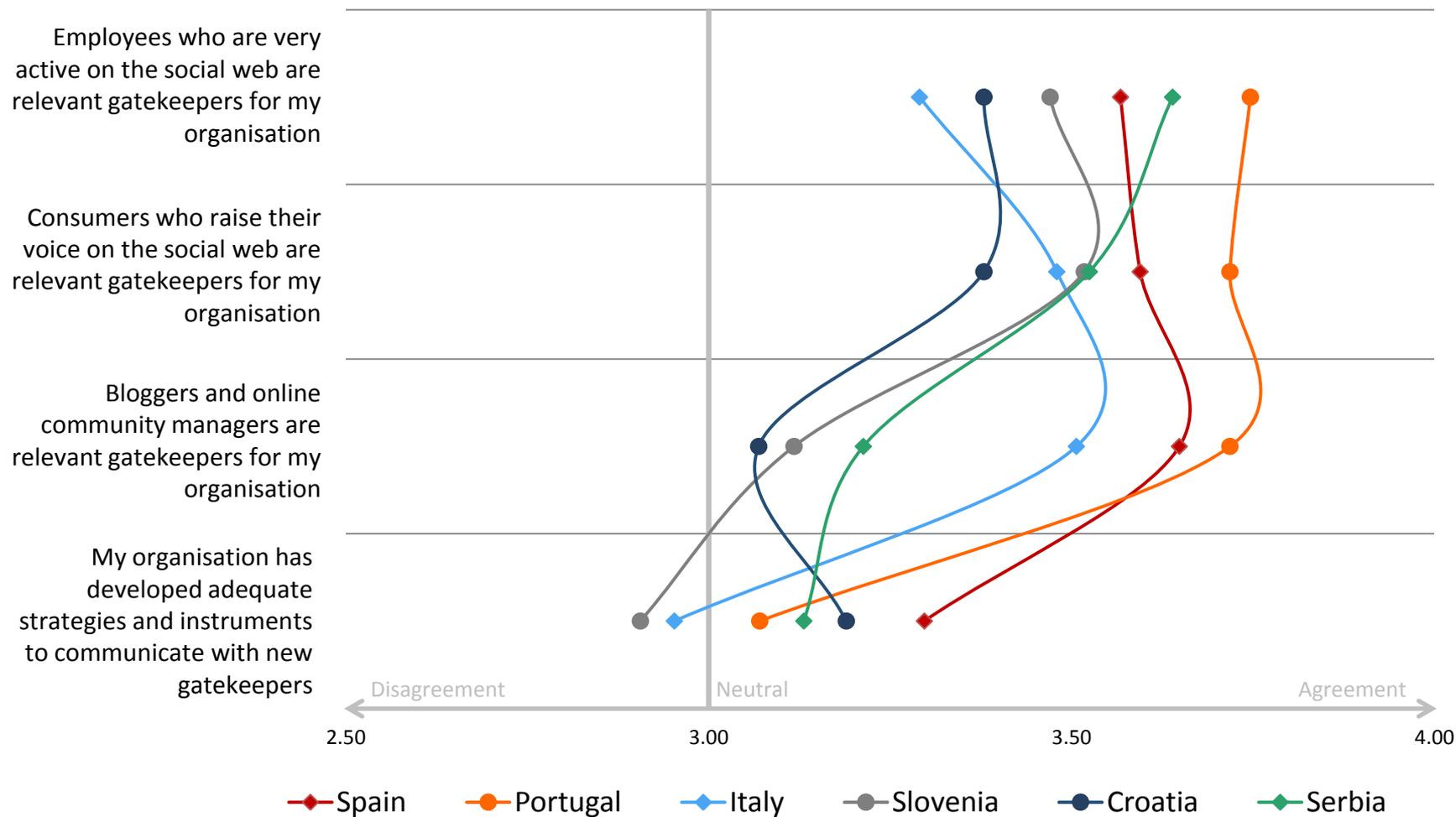
Digital gatekeepers in Western Europe: Perceived relevance and strategies



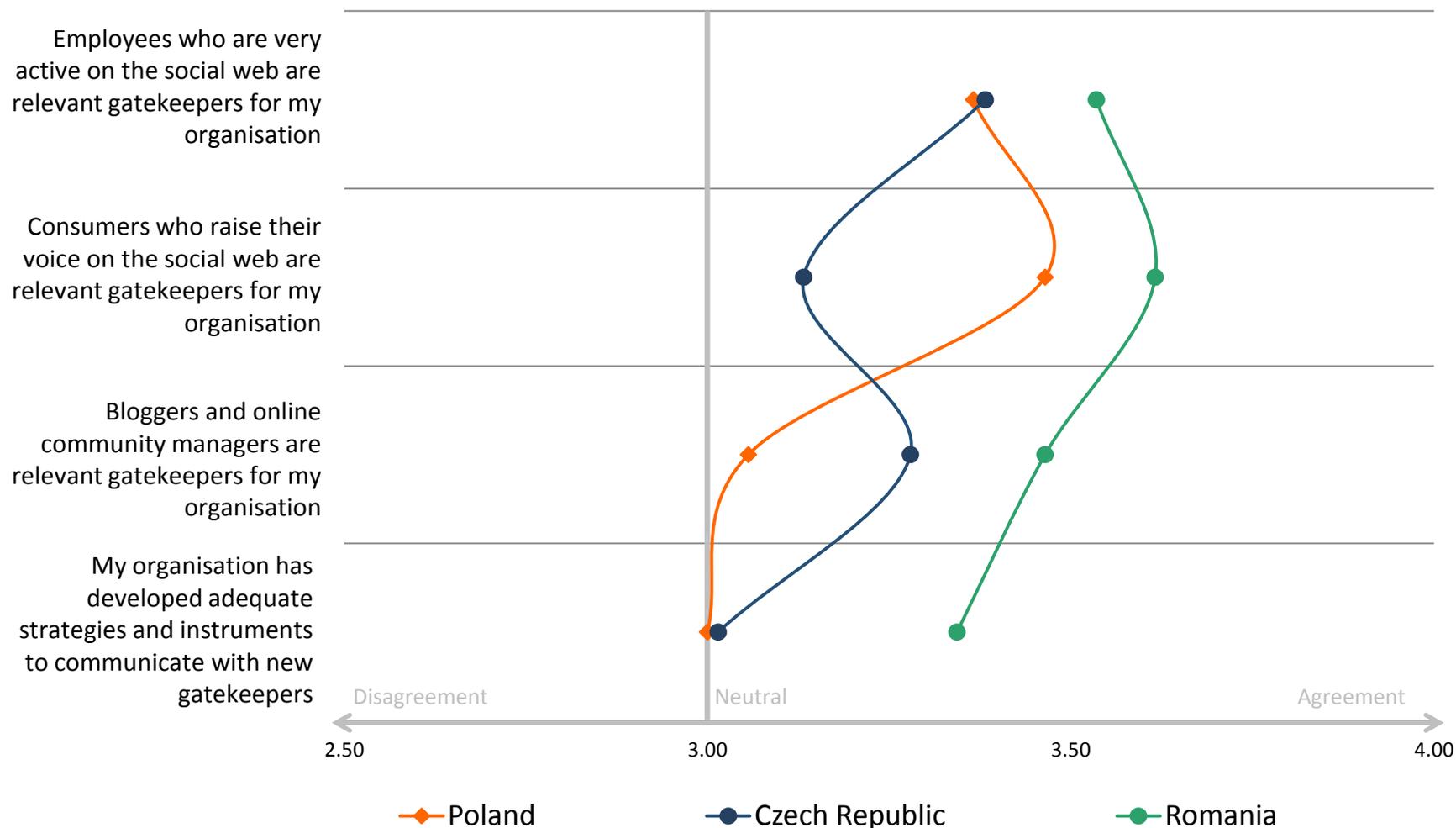
Digital gatekeepers in Northern Europe: Perceived relevance and strategies



Digital gatekeepers in Southern Europe: Perceived relevance and strategies



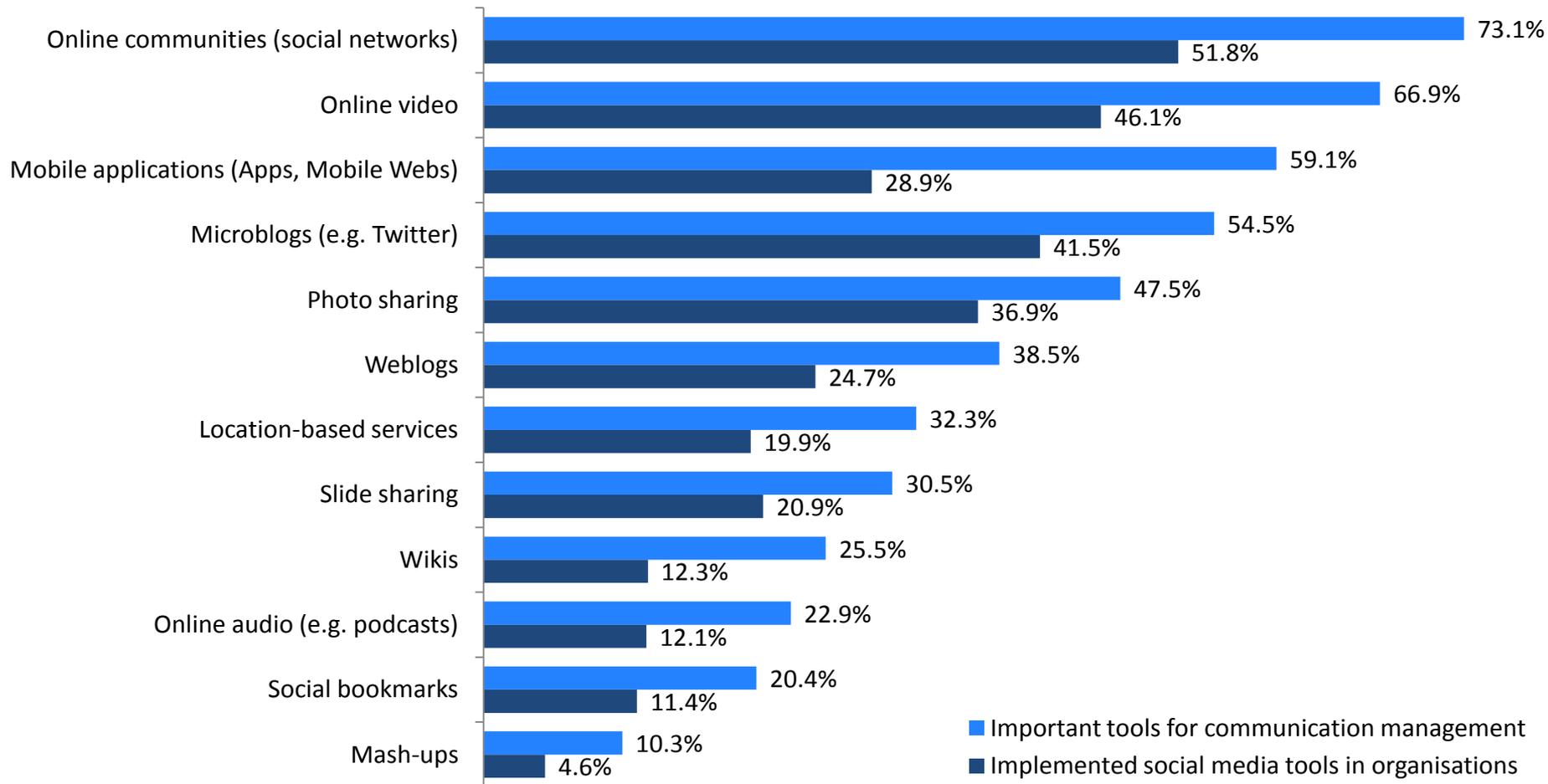
Digital gatekeepers in Eastern Europe: Perceived relevance and strategies



Social media use of communication professionals correlates positively with perception changes, stakeholder relevance and strategy development

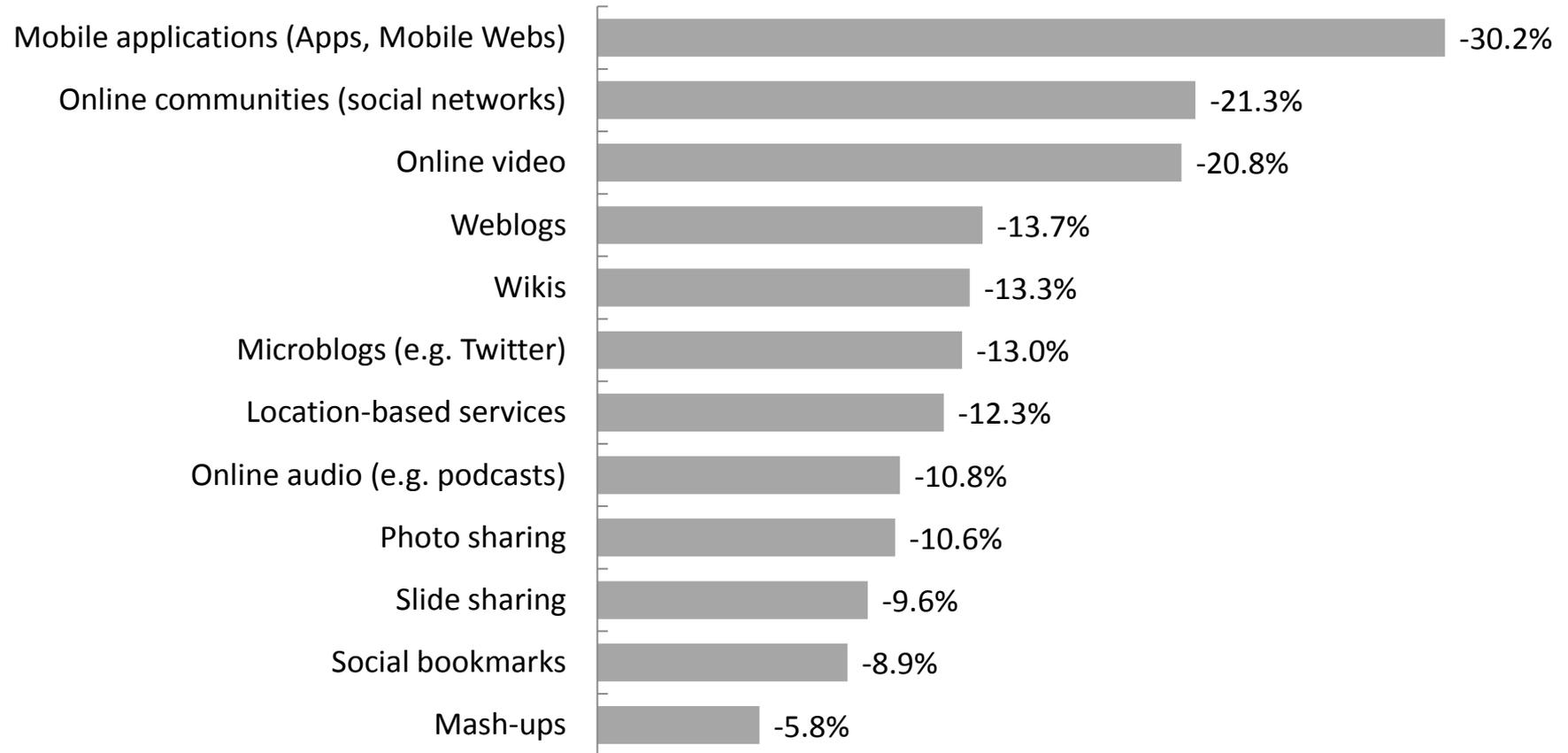
	Professional use of social media	Private use of social media
Social media content changes the perceptions of external stakeholders about my organisation	$\tau = 0.228$	$\tau = 0.148$
Social media content changes the perceptions of employees about my organisation	$\tau = 0.157$	$\tau = 0.096$
Monitoring social media changes my own perception of stakeholders and other organisations	$\tau = 0.184$	$\tau = 0.133$
Bloggers and online community managers are relevant gatekeepers for my organisation	$\tau = 0.160$	$\tau = 0.106$
Consumers who raise their voice on the social web are relevant gatekeepers for my organisation	$\tau = 0.133$	$\tau = 0.100$
Employees who are very active on the social web are relevant gatekeepers for my organisation	$\tau = 0.157$	$\tau = 0.094$
My organisation has developed adequate strategies and instruments to communicate with new gatekeepers on the social web	$\tau = 0.238$	$\tau = 0.063$

Social media communications in Europe: Importance and implementation of alternative tools and channels



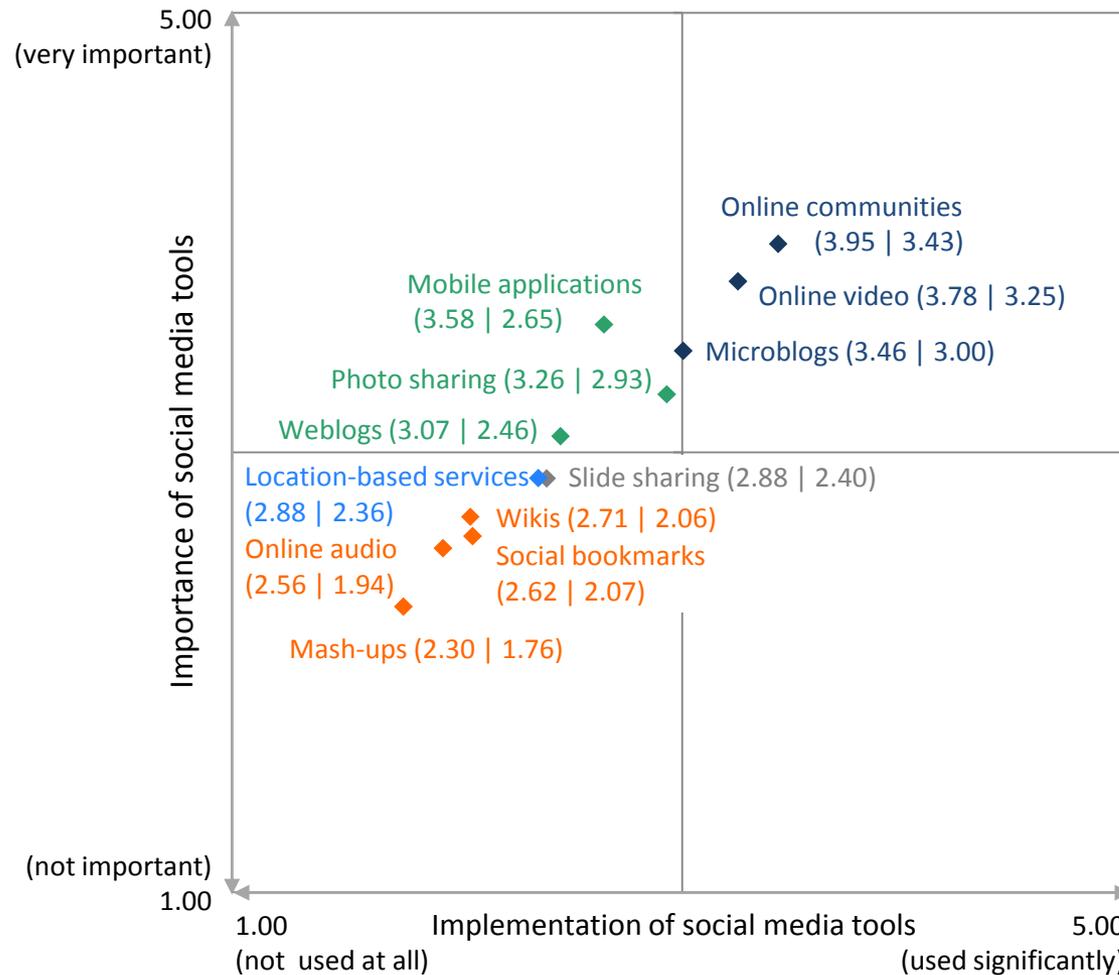
Implementing mobile media is the key challenge for strategic communication

Gap between importance und implementation of social media communication tools



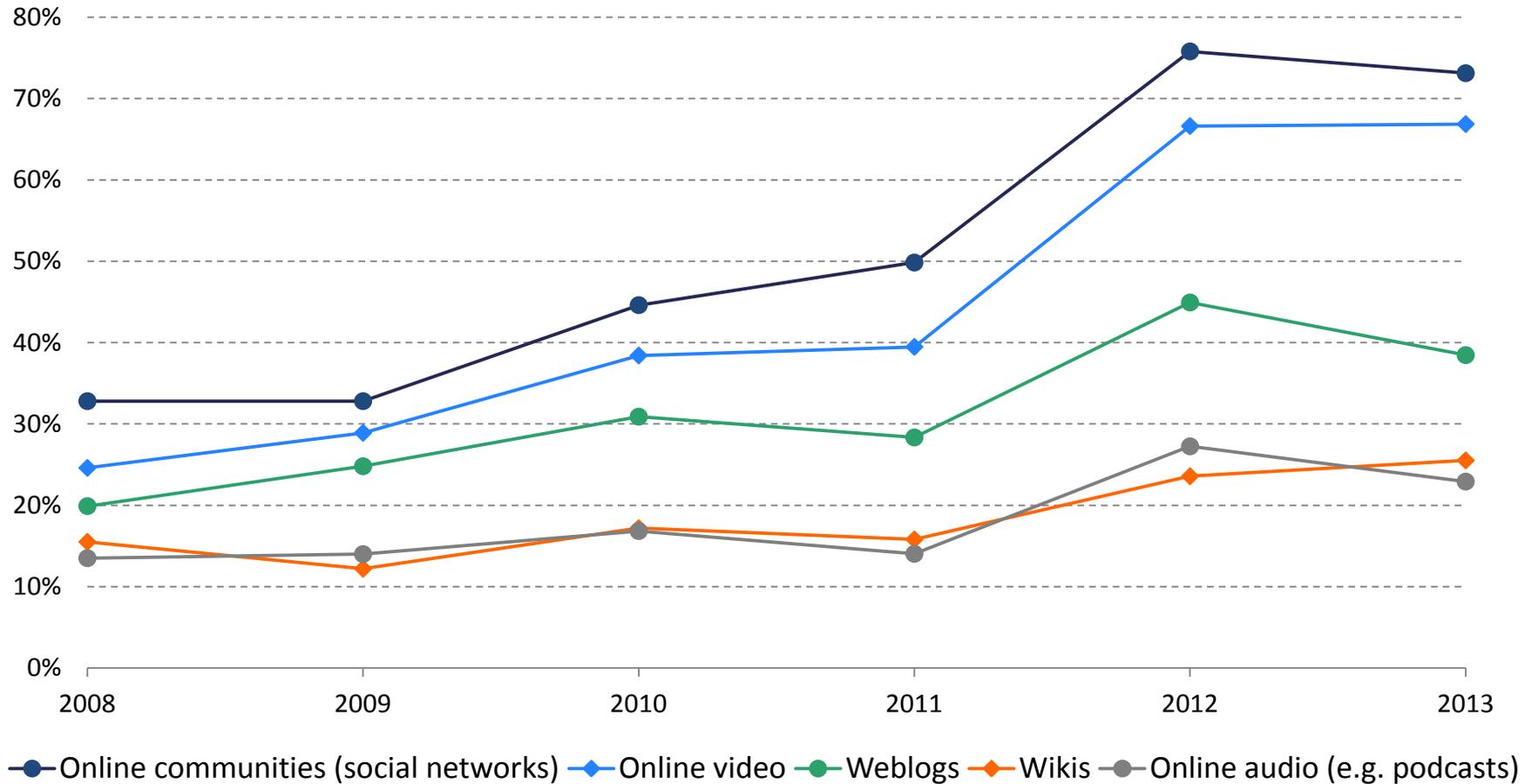
www.communicationmonitor.eu / Zerfass et al. 2013 / n^{min} = 2,358 PR professionals. Q 8: Can you indicate the general level of importance for communication management of the following tools? Scale 1 (not important) – 5 (very important). Q 9: To what extent has your organisation implemented these instruments in its daily communication activities? Scale 1 (not used) – 5 (used significantly). Percentages: Agreement based on scale points 4-5. Implementation is always smaller than perceived importance.

Opportunities and needs for enhancing social media communication



www.communicationmonitor.eu / Zerfass et al. 2013 / n^{min} = 2,358 PR professionals. Q 8: Can you indicate the general level of importance for communication management of the following tools? Scale 1 (not important) – 5 (very important). Q 9: To what extent has your organisation implemented these instruments in its daily communication activities? Scale 1 (not used) – 5 (used significantly). Percentages: Agreement based on scale points 4-5. Implementation is always smaller than perceived importance.

Perceived importance of social media tools is not growing any more, compared to previous years



www.communicationmonitor.eu / Zerfass et al. 2013 / n = 2,358 PR professionals. Q 8. Zerfass et al. 2012 / n = 1,925. Q 10. Zerfass et al. 2011 / n = 2,009. Q 13. Zerfass et al. 2010 / n = 1,955. Q 13. Zerfass et al. 2009 / n = 1,863. Q 10. Zerfass et al. 2008 / n = 1,542. Q 7: Can you indicate the general level of importance for communication management of the following tools? Scale 1 (not important) – 5 (very important). Percentages. Agreement based on scale points 4-5. ECM 2008-2011 asked for the importance of social media in the context of online and offline communication channels.

Significant differences between the perceived importance of weblogs, photo sharing and location based services across Europe

	Weblogs	Photo sharing	Location-based services		Weblogs	Photo sharing	Location-based services
Germany	44.9%	35.6%	35.3%	Finland	45.6%	47.1%	29.2%
Austria	35.0%	45.5%	30.8%	Spain	51.8%	48.6%	31.9%
Switzerland	36.0%	39.9%	34.3%	Portugal	44,3%	46,9%	41.5%
France	38.8%	45.5%	26.2%	Italy	38.4%	41.8%	38.1%
Belgium	38.3%	36.2%	27.8%	Slovenia	30.7%	46.8%	35.1%
Netherlands	38.9%	44.8%	27.7%	Croatia	28.3%	61.8%	35.2%
United Kingdom	45.6%	35.7%	22.7%	Serbia	31.0%	69.5%	45.6%
Denmark	16.2%	38.2%	27.0%	Poland	34.8%	55.9%	35.4%
Sweden	31.7%	47.2%	31.7%	Czech Republic	16.7%	54.7%	36.5%
Norway	24.8%	38.5%	20.6%	Romania	53.2%	67.4%	31.9%



Social media skills and use by professionals

Chapter overview

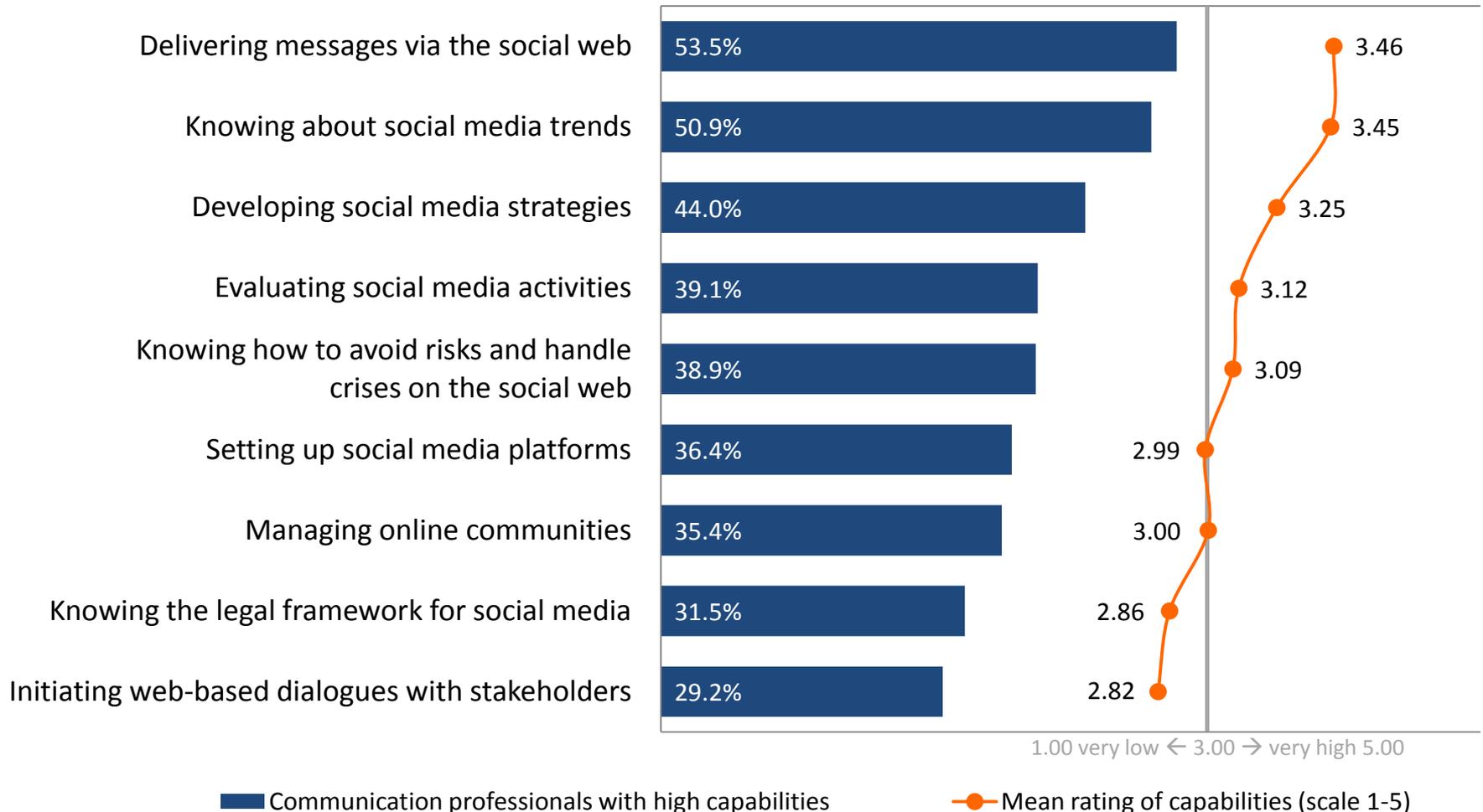
When we consider the development of specific competencies for modern communication practitioners (Tench et al., 2013), it is essential to consider their use and understanding of technology-driven skills. Exemplifying this is the understanding and application of social media skills. Rather worryingly, the headline observation of this year's study is that practitioners display rather moderate capabilities when it comes to their skills and knowledge of social media in a professional context. This supports recent qualitative studies of senior practitioners in Europe (Tench et al. 2013: 56-57) where interviewees expressed explicit areas of knowledge weakness in online communications. Similar findings have been discussed from a North American perspective (DiStaso et al., 2011). According to the monitor 2013, the highest responses for understanding and application of social media are for delivering messages via the social web and for knowing about social media trends. On the flip side the weaker areas of the respondents' competencies are knowledge about the legal framework for social media (as picked up in previous surveys; Zerfass et al., 2011, 2012) and starting web-based dialogues with stakeholders. Both fall below the mean scores for capabilities.

When comparing the findings from this 2013 survey with results from the ECM 2011, the two areas where European practitioners demonstrate the highest increase in capabilities are related to operational aspects (delivering messages via the social web, setting up social media platforms). Strategic skills, i.e. for strategy development and trend analysis, have grown to a lesser extent or are even diminishing.

It is also interesting to compare capabilities in the different regions of Europe. From Western Europe the Swiss and the Dutch are most positive when reporting their abilities with social media, with the French the least. Within Northern Europe the Swedes and Norwegians are most confident with the Danes the least, especially regarding the evaluation of social media activities. For Southern Europe the Spanish and Croatian respondents are the most bold about their statements on competency in social media with the Slovenians the least. In Eastern Europe the Romanians are most confident, whereas communication professionals from the Czech Republic and Poland are both highlighting weaknesses in setting up social media platforms and initiating web-based dialogues with stakeholders. As well as national differences, the organisational setting affects perceived competency. The findings suggest that those practitioners working in private companies and agencies have the highest levels of reported social media skills.

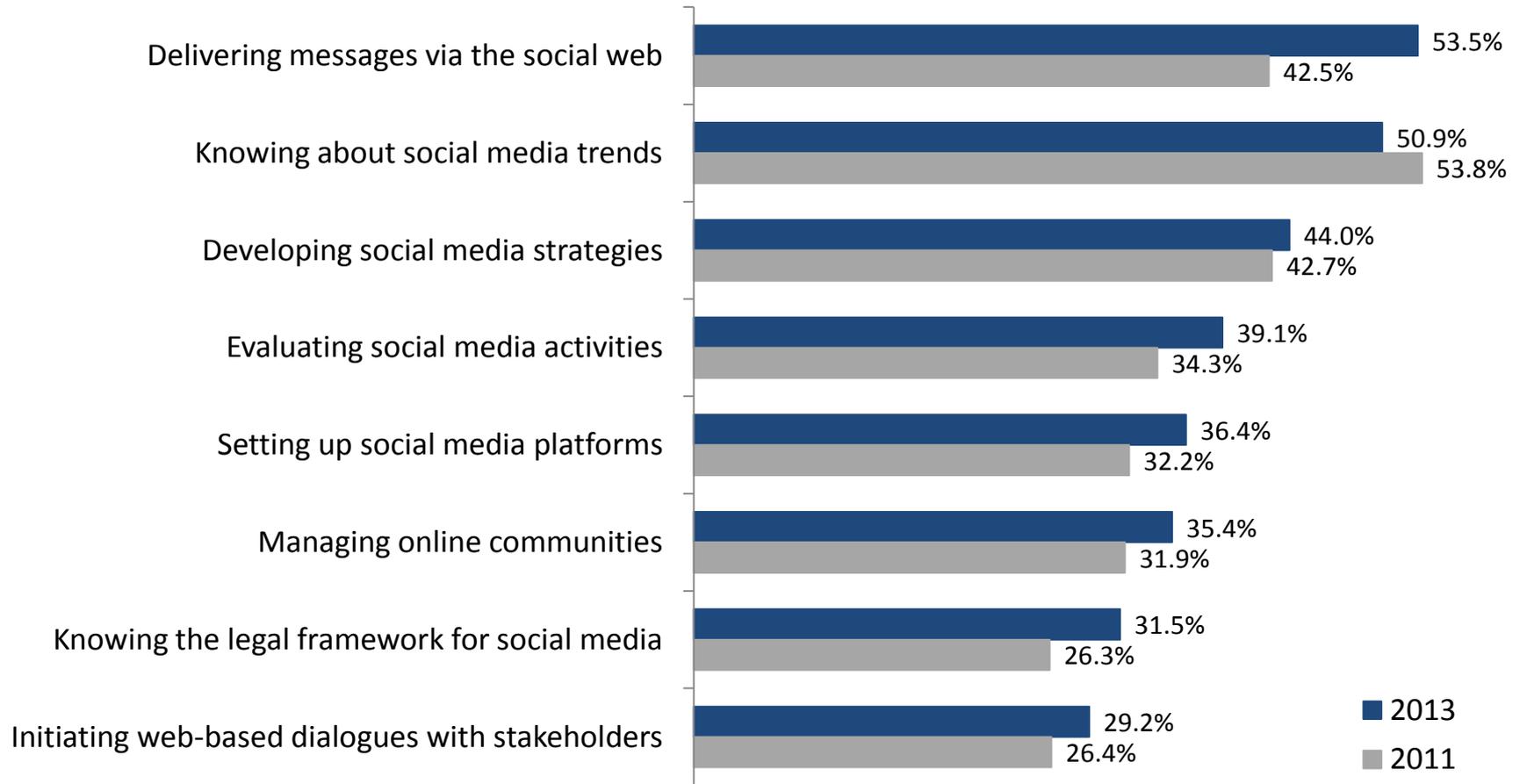
Another debated area in society generally and in strategic communication practice specifically is the differences in behaviour across demographic age groups when it comes to social media usage. How do professionals engage with social media in their private lives and how much in their work environment? The findings demonstrate inevitable differences between practitioners from different age groups and also a correlation between private use and professional use of social media. For example, the ECM data show that twice as many practitioners under the age of 30 use social media privately on a daily basis (85 per cent) compared with the over 60s age group (42.9 per cent). However, there are surprisingly small differences for the professional usage. Every second professional in every age group uses social media daily, and only those in their twenties report more intense usage patterns.

Social media skills and knowledge: Communication professionals in Europe report moderate capabilities

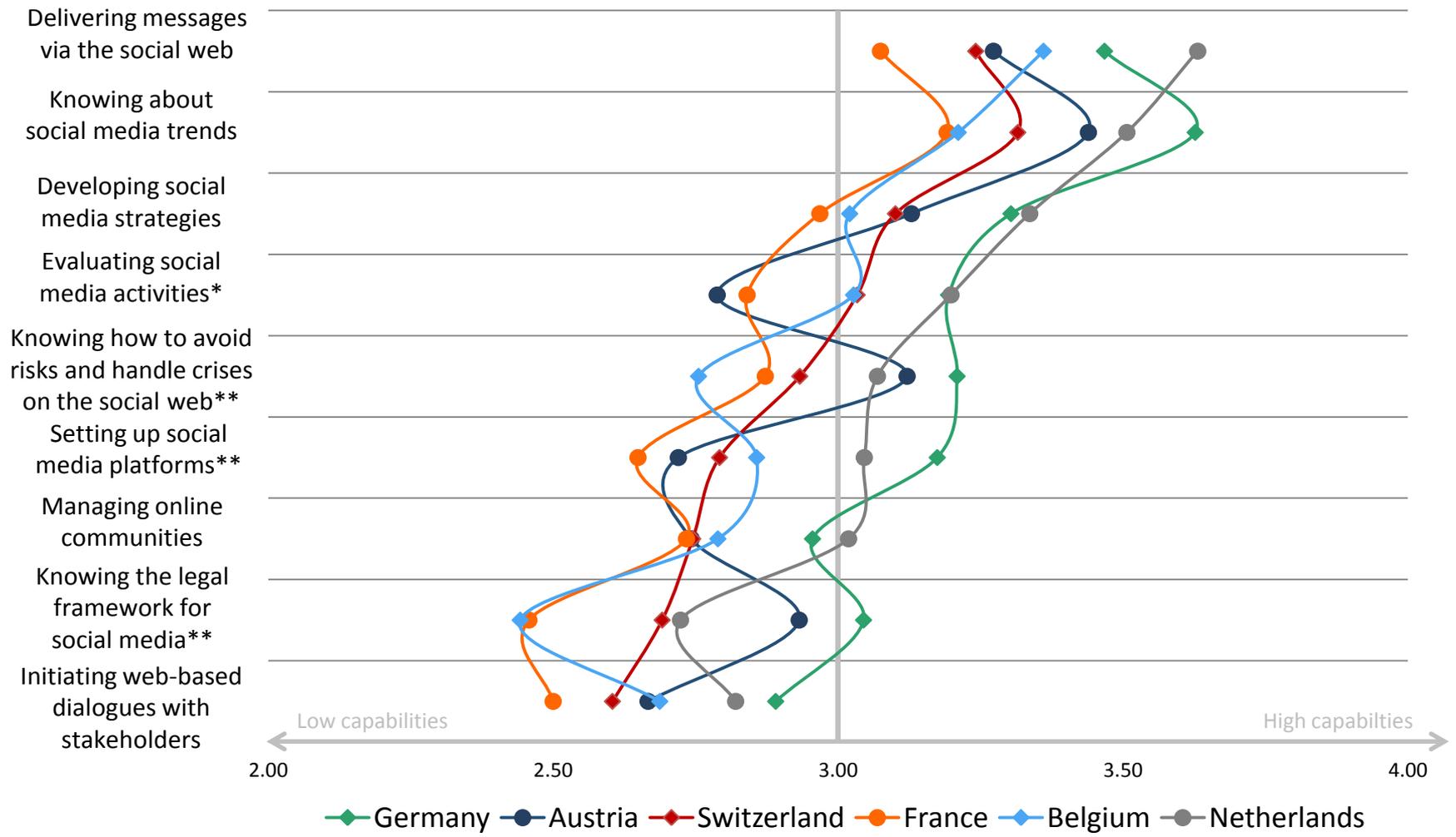


Growth of social media skills and knowledge during the last two years

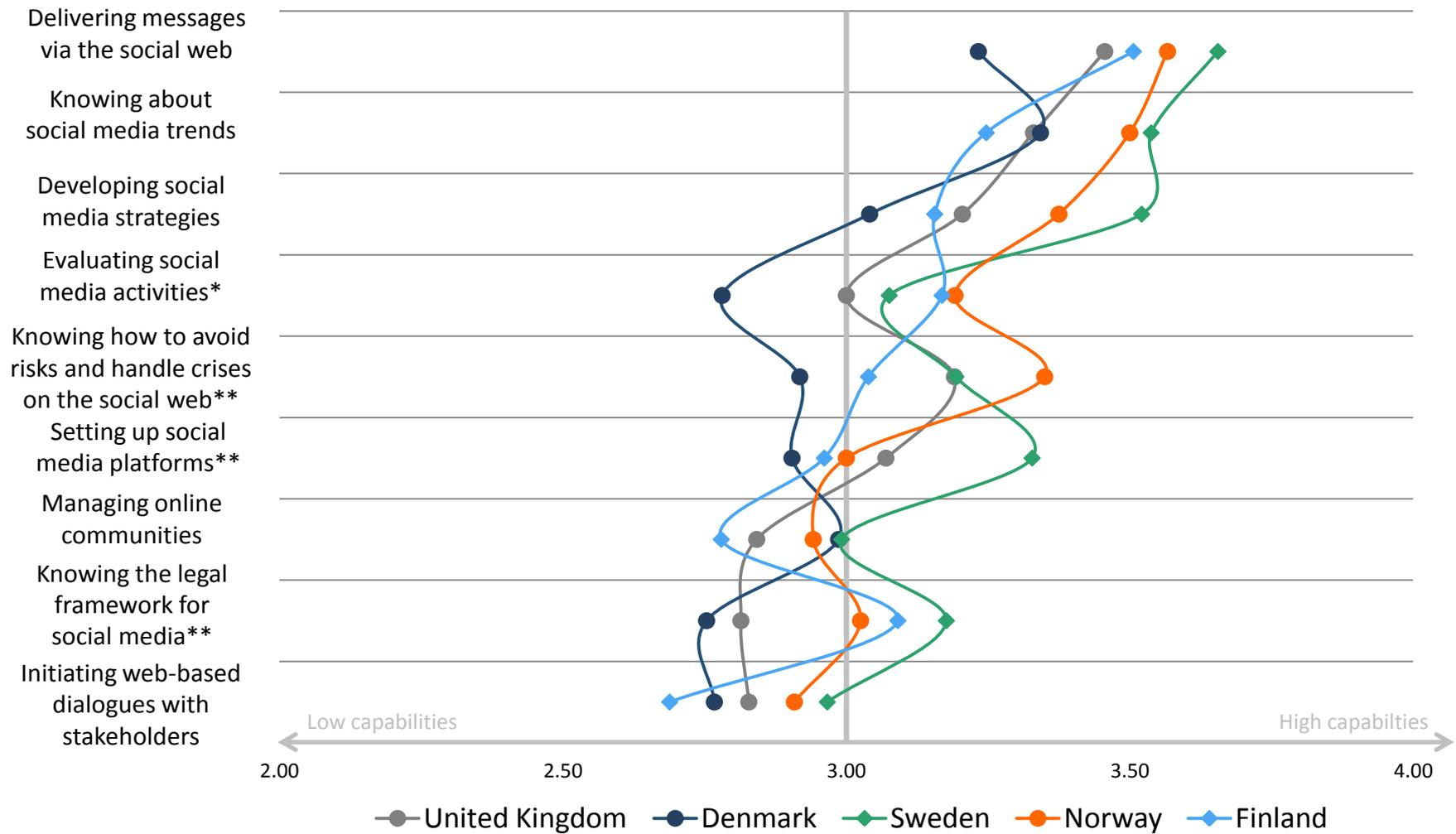
Communication professionals with high capabilities



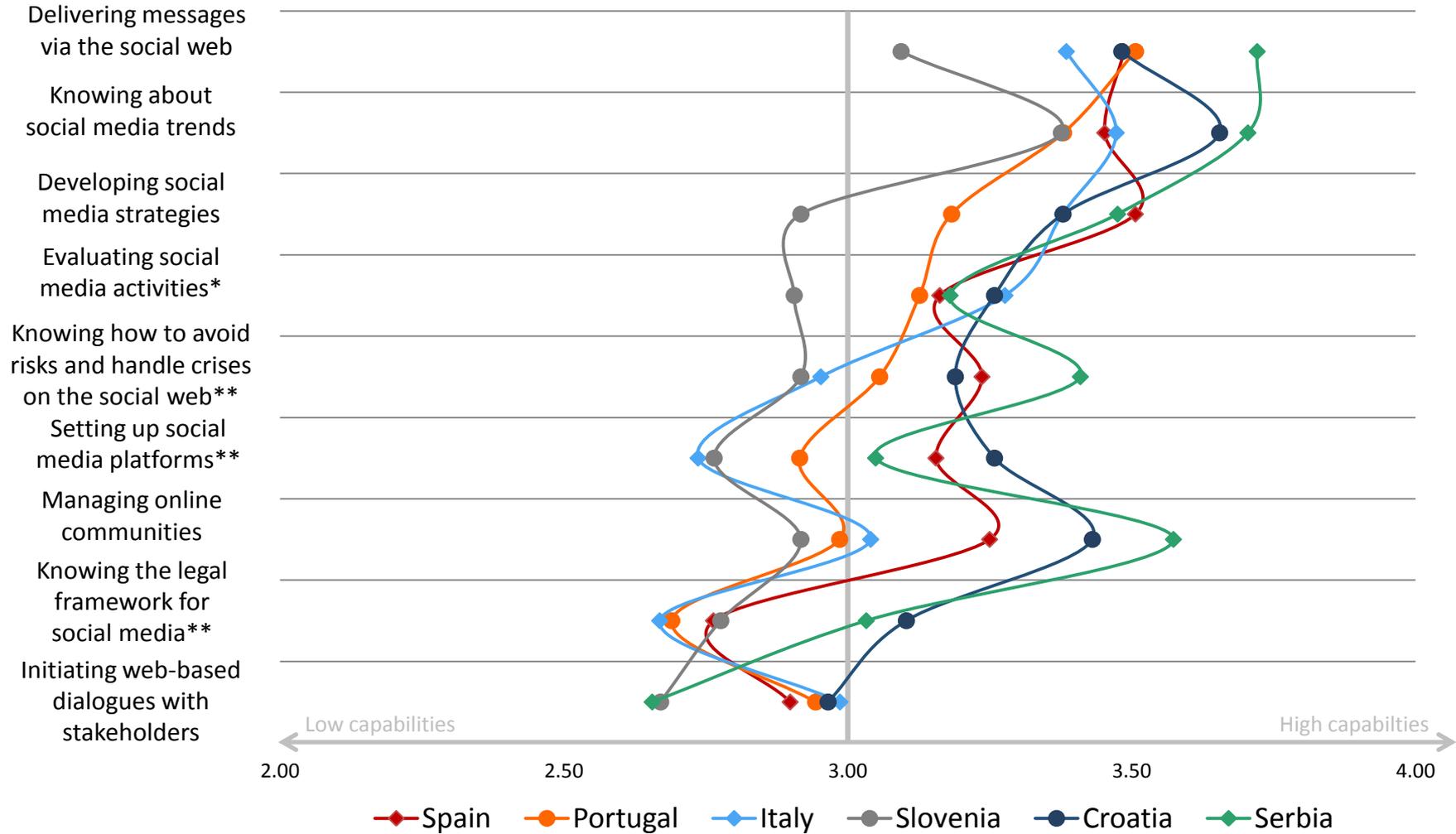
Social media skills of communication professionals in Western Europe



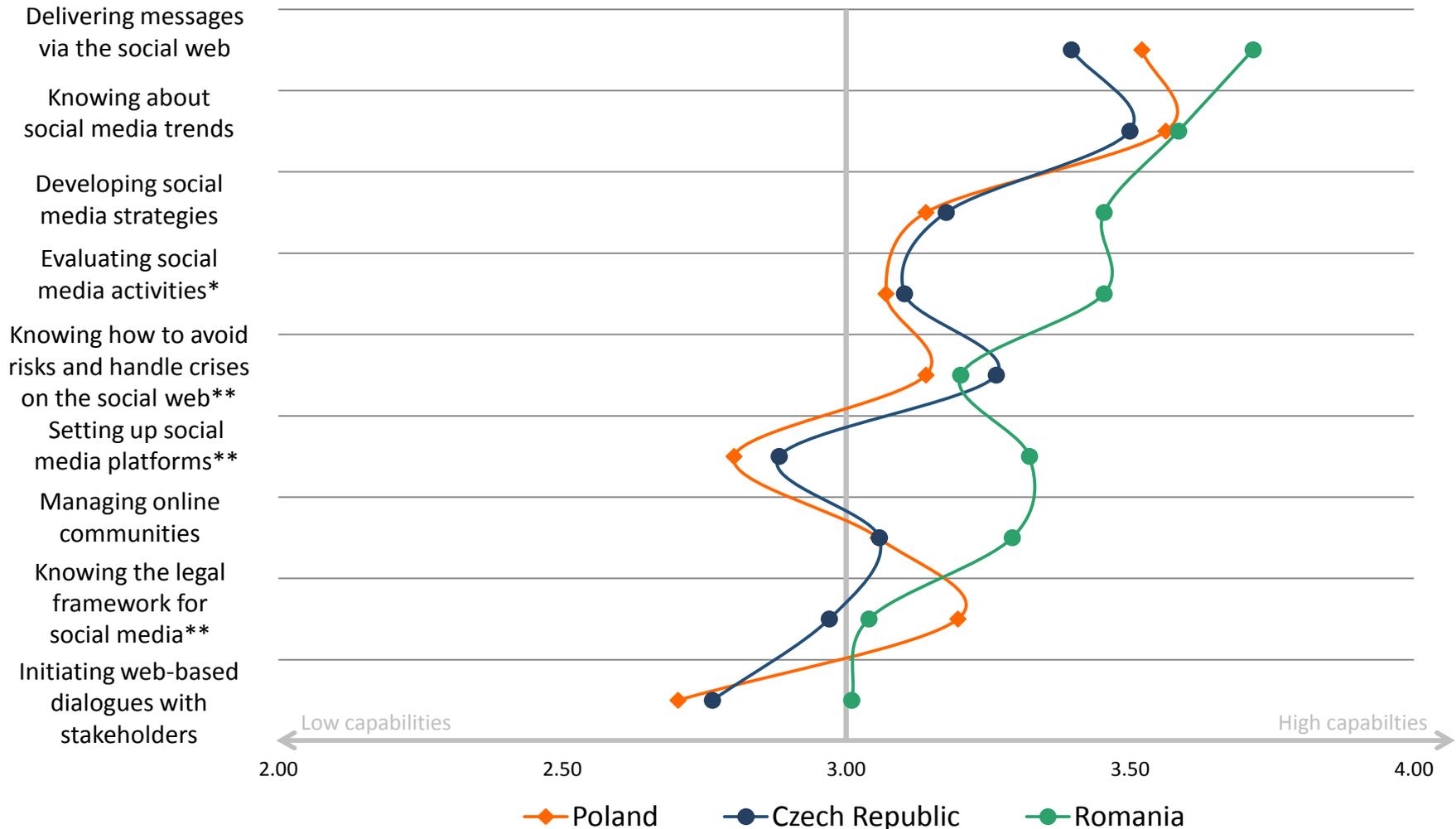
Social media skills of communication professionals in Northern Europe



Social media skills of communication professionals in Southern Europe



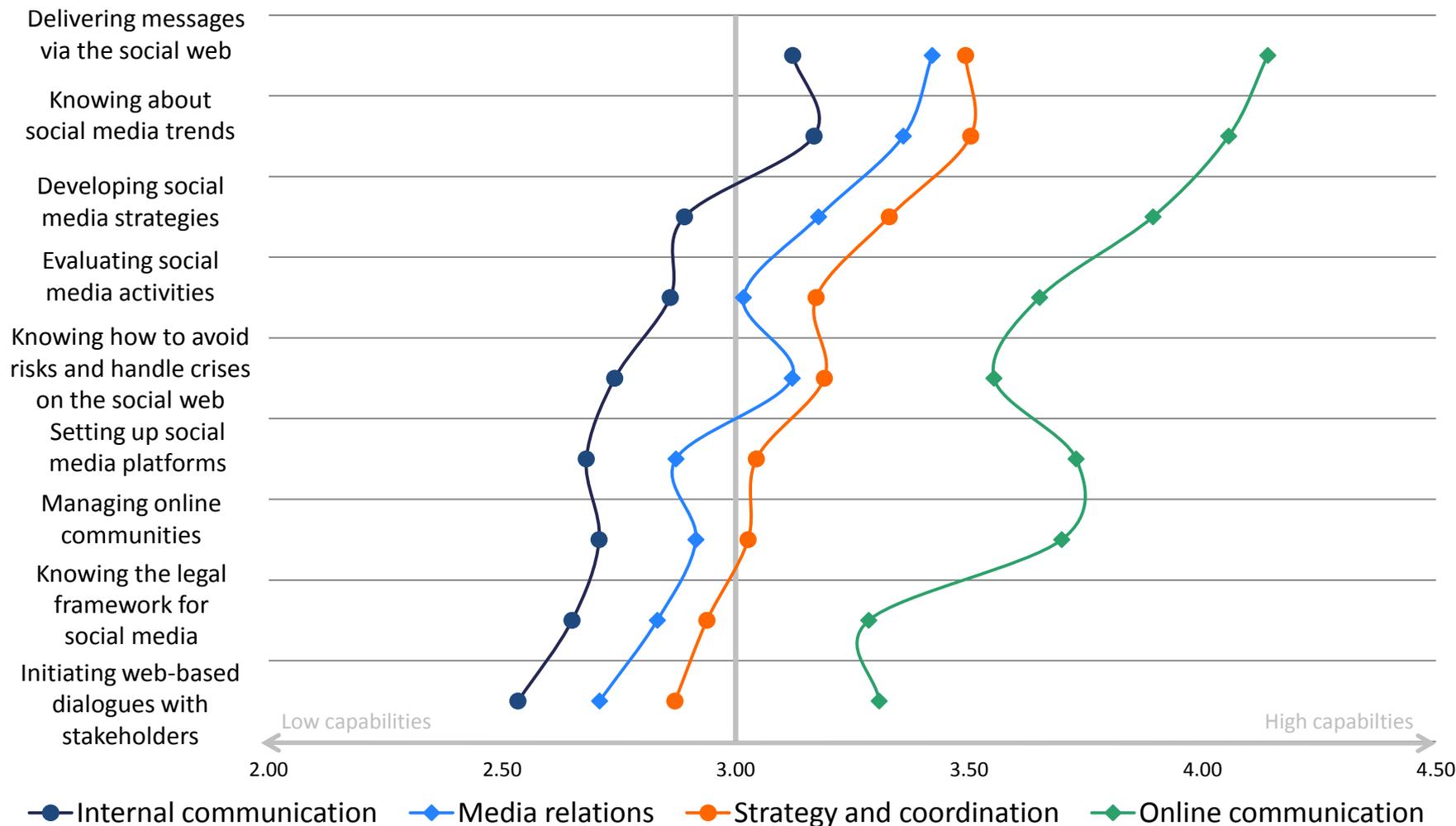
Social media skills of communication professionals in Eastern Europe



Professionals working in private companies and agencies report the highest level of social media skills

	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations	Consultancies and agencies	Overall
Knowing about social media trends**	47.7%	51.4%	46.8%	44.4%	59.9%	50.9%
Delivering messages via the social web**	45.6%	55.5%	50.2%	54.8%	61.6%	53.5%
Initiating web-based dialogues with stakeholders**	25.8%	28.3%	23.5%	28.4%	37.6%	29.2%
Setting up social media platforms*	33.0%	36.5%	33.0%	38.8%	40.7%	36.4%
Knowing the legal framework for social media	32.0%	31.3%	33.0%	25.6%	33.4%	31.5%
Managing online communities**	28.9%	34.8%	32.4%	36.4%	43.9%	35.4%
Developing social media strategies**	40.0%	44.3%	38.0%	41.0%	53.4%	44.0%
Evaluating social media activities**	38.5%	39.1%	32.6%	30.9%	48.3%	39.1%
Knowing how to avoid risks and handle crises on the social web**	36.1%	38.1%	36.4%	35.5%	45.8%	38.9%

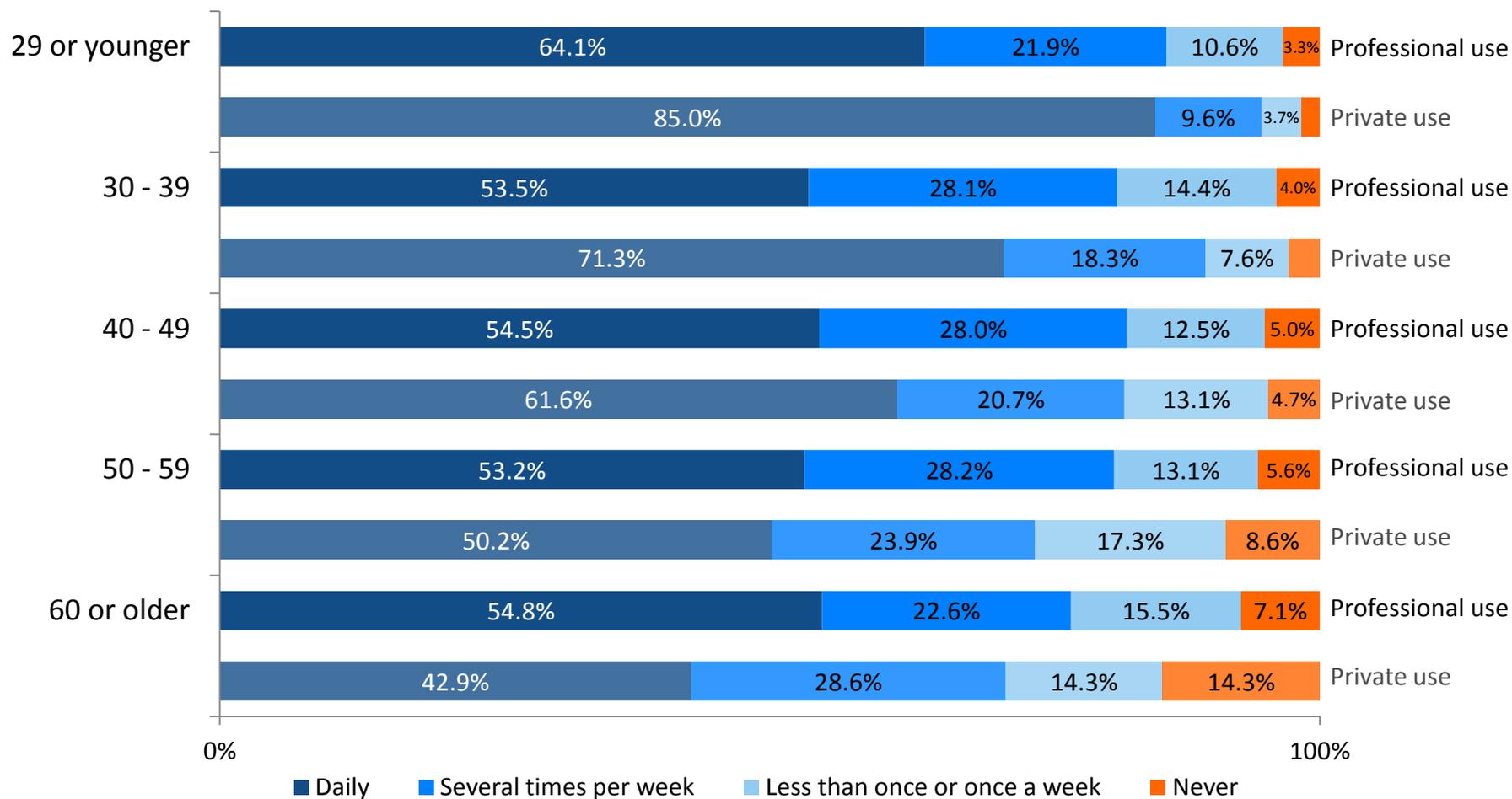
Social media skills of professionals working in different fields of communication



Competencies correlate positively with the professional and private social media use by communication professionals

	Professional use of social media	Private use of social media
Delivering messages via the social web	$\tau = 0.331$	$\tau = 0.206$
Knowing about social media trends	$\tau = 0.281$	$\tau = 0.178$
Developing social media strategies	$\tau = 0.326$	$\tau = 0.144$
Evaluating social media activities	$\tau = 0.264$	$\tau = 0.147$
Knowing how to avoid risks and handle crises on the social web	$\tau = 0.256$	$\tau = 0.121$
Setting up social media platforms	$\tau = 0.306$	$\tau = 0.160$
Managing online communities	$\tau = 0.307$	$\tau = 0.158$
Knowing the legal framework for social media	$\tau = 0.213$	$\tau = 0.090$
Initiating web-based dialogues with stakeholders	$\tau = 0.279$	$\tau = 0.144$

Professional and private use of social media by different age groups of communication professionals in Europe





Communicating strategies for different generations

Chapter overview

Interestingly, but not surprisingly, the vast majority of communication professionals in Europe do not observe a difference in communication behaviour between the different generations, sometimes labelled as the digital natives (people under the age of 30) and the older generations (people over the age of 30) like generation X (people born between 1956 and 1980), the baby boomers (the post war generation) or the traditionalists, people over 70 (Raines, 2003; Meister & Willyerd, 2010). 85.5 per cent of the respondents experience the same overall media preferences and communication behaviour when communicating with stakeholders of various age groups. Only 14.5 per cent report differences in both respects. Although there are some differences per country, all over Europe a big majority underlines that the media preferences of the various generations are the same. The most remarkable trend towards a variation is reported from France, where one quarter of the respondents have had this experience. It seems that the digital gap between the generations is closing, at least in the experience of public relations and communication professionals.

Social media are supplementary to the traditional media (Aarts, 2011) and many organisations use them today to reach several kinds of communication goals (Kerkhof, van Noort & Antheunis, 2011). The digital natives do have some specific characteristics compared to the older generations though. They are perceived to be more interactive, as reported by 89.2 per cent of the communication professionals, more involved in communication (approved by 76.2 per cent), and they are demanding more feedback than people over thirty (reported by 75.4 per cent). Only every second respondent thinks digital natives are more critical, and less than a quarter of the European communication professionals agree that they are more focussed on relevant issues or more conformist.

Despite the coherent communication behaviour, many organisations use specific communication strategies and media to approach different age groups. 20.3 per cent do this often, 40.1 per cent sometimes and 20.7 per cent not yet, but have planned such diversified communication. Only 19 per cent are not doing this and are also not planning to do so in the near future. A differentiated approach is significantly more often used by communication agencies (73.5 per cent) and governmental organisations (64 per cent), compared to non-profits (56.2 per cent) as well as joint stock and private companies (52.9 per cent).

The frequency of using specific communication strategies for different generations differs per European country as well. Countries where organisations use these differentiated strategies most frequently include Portugal (73.2 per cent), Poland (70.4 per cent), Romania (69.7 per cent), the Czech Republic (69.1 per cent), Slovenia (68.2 per cent), Serbia (67.2 per cent), Sweden (66.4 per cent), and Austria (65.9 per cent).

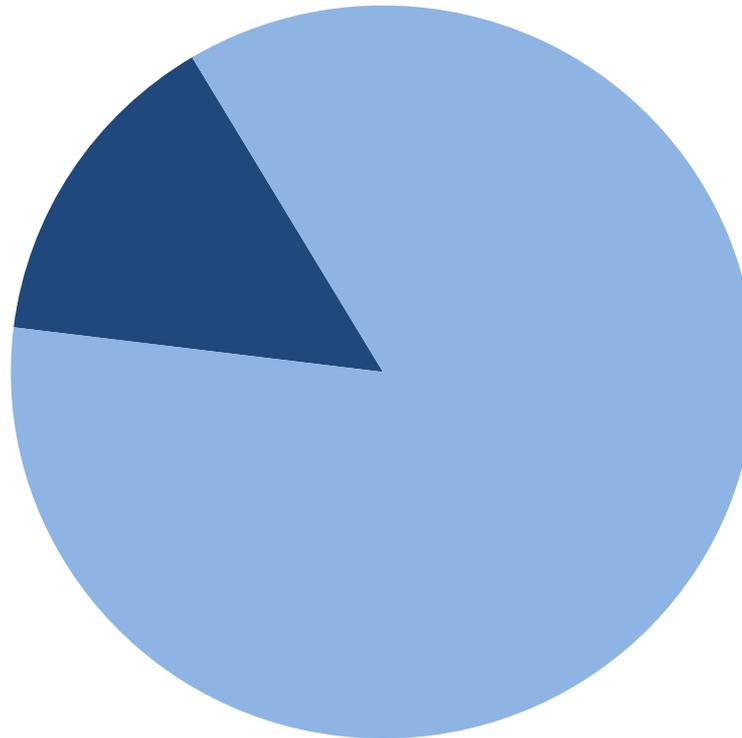
Organisations where professionals work that report about alternative communication behaviours among different generations, tend to use more specific strategies and media for different age groups. 64.9 per cent of organisations experiencing differences between generations use specific programmes often or sometimes, compared to 43.1 per cent of organisations that see more homogeneous audiences. While the strategies chosen by the first group seem rational, it is not clear at all why a large part of organisations that do not believe in differences among age groups use diversified strategies anyway. More qualitative research is needed here.

Communicating behaviour of different generations: Most professionals experience the same media preferences

When practitioners communicate with stakeholders of various age groups

14.5%

experience different
media preferences
and communication
behaviour



85.5%

experience the same
media preferences
and communication
behaviour

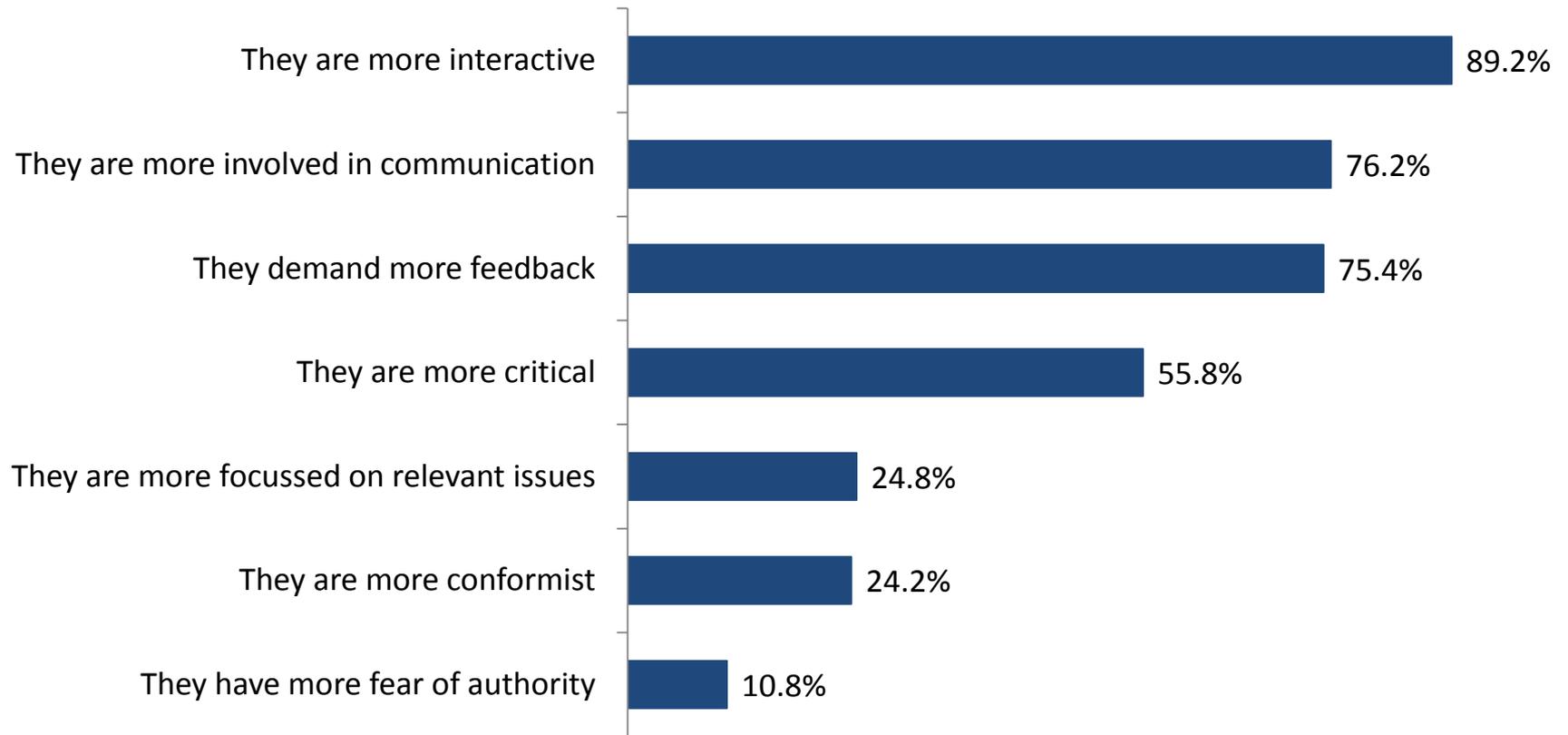
Communication behaviour related to age groups across Europe

	Different media preferences	Same media preferences		Different media preferences	Same media preferences
Germany	10.1%	89.9%	Finland	16.9%	83.1%
Austria	16.1%	83.9%	Spain	14.5%	85.5%
Switzerland	13.3%	86.7%	Portugal	11.1%	88.9%
France	25.6%	74.4%	Italy	17.8%	82.2%
Belgium	17.4%	82.6%	Slovenia	13.0%	87.0%
Netherlands	11.7%	88.3%	Croatia	19.6%	80.4%
United Kingdom	13.0%	87.0%	Serbia	12.3%	87.7%
Denmark	17.9%	82.1%	Poland	13.8%	86.2%
Sweden	13.3%	86.7%	Czech Republic	15.0%	85.0%
Norway	14.7%	95.3%	Romania	15.7%	84.3%

www.communicationmonitor.eu / Zerfass et al. 2013 / n = 2,486 PR professionals. Q 11: Audience research suggests that people have different media preferences and communication behaviours depending on their age group (Digital natives, Generation X, Baby boomers, Traditionalists, etc.). Do you experience such differences among the stakeholders of your organisation or clients? Percentages: Agreement to “yes” (Different) or “no” (Same).

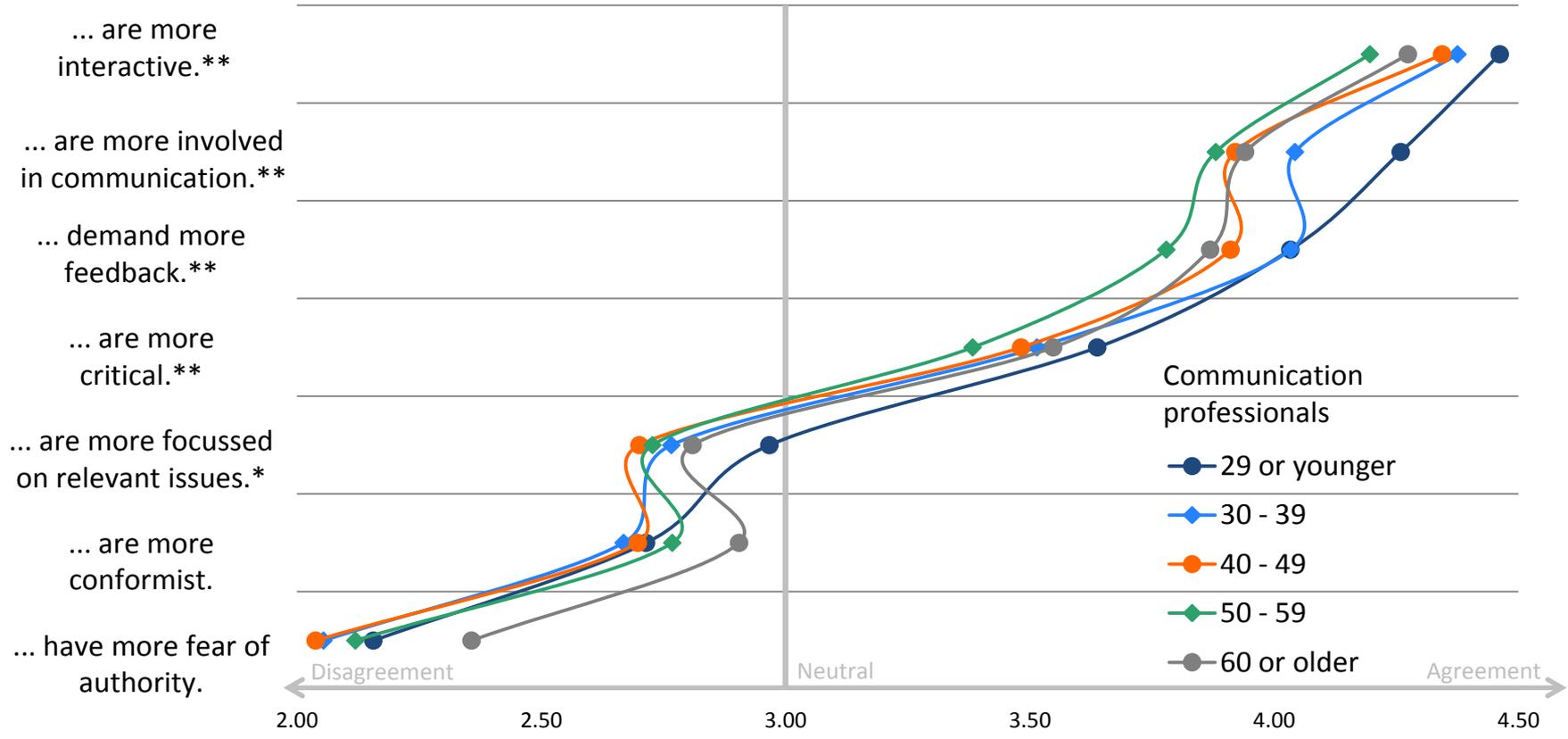
Communication behaviour of digital natives – the generation under 30 years: more interactive, more involved in communication, demanding more feedback

Characterisation of digital natives, compared to previous generations



Perception of digital natives depending on the age of respondents

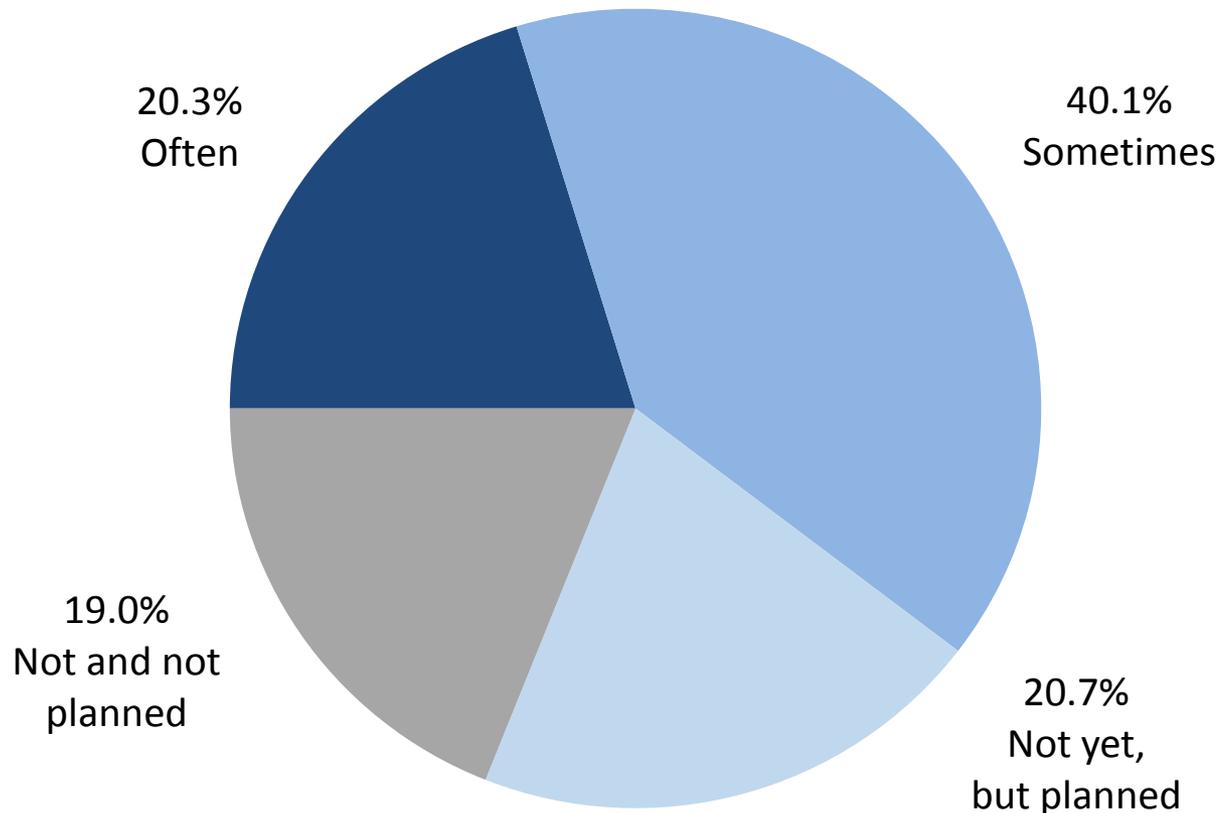
Digital natives (aged under 30 years) ...



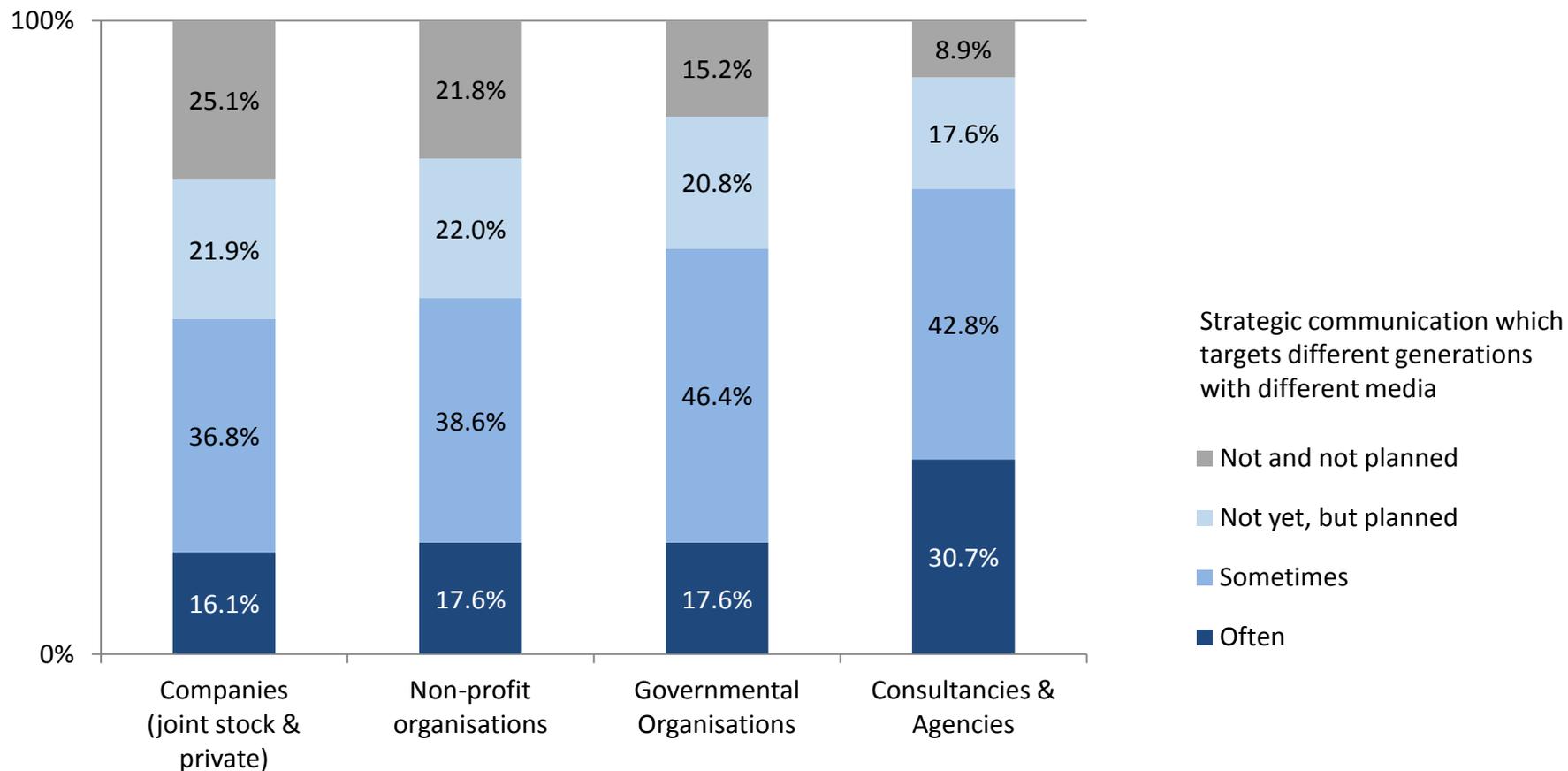
www.communicationmonitor.eu / Zerfass et al. 2013 / n = 2,710 PR professionals. Q 12: Do you believe that the younger generation (so-called digital natives, aged under 30 years) are communicating differently from previous generations? Please state whether you agree with those statements. Scale 1 (I don't agree at all) – 5 (I fully agree). Mean values. ** Highly significant correlations (Kendall rank correlation, $p \leq 0.01$). * Significant correlations (Kendall rank correlation, $p \leq 0.05$)

Many organisations use specific communication strategies and media when approaching different generations

Development of strategic communication programmes or campaigns which target different generations with different media



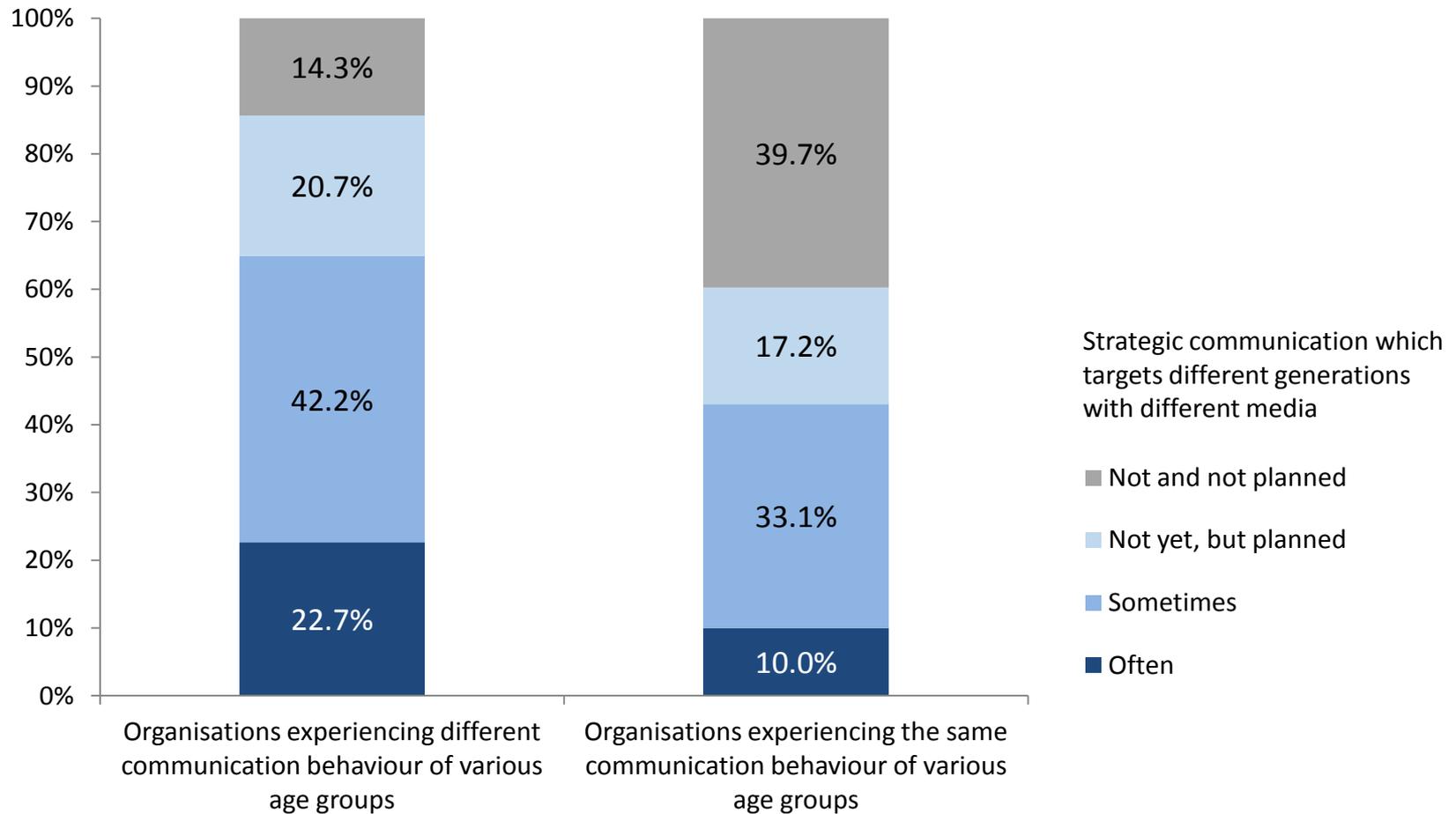
Differentiated approaches for various generations are more often used by agencies and governmental organisations; companies are less attentive



Practice of targeting different generations with specific communication strategies across Europe

	Often or sometimes	Not yet, but planned	Not and not planned		Often or sometimes	Not yet, but planned	Not and not planned
Germany	58.7%	24.4%	16.9%	Finland	50.6%	19.5%	29.9%
Austria	65.9%	15.2%	18.9%	Spain	60.2%	21.6%	18.2%
Switzerland	49.7%	21.5%	28.9%	Portugal	73.2%	15.5%	11.3%
France	46.8%	21.3%	31.9%	Italy	62.8%	20.3%	16.9%
Belgium	50.3%	20.4%	29.3%	Slovenia	68.2%	16.5%	15.3%
Netherlands	58.1%	20.3%	21.7%	Croatia	62.1%	27.6%	10.3%
United Kingdom	53.5%	23.7%	22.8%	Serbia	67.2%	24.6%	8.2%
Denmark	54.8%	20.5%	24.7%	Poland	70.4%	14.1%	15.5%
Sweden	66.4%	19.3%	14.3%	Czech Republic	69.1%	19.1%	11.8%
Norway	62.5%	16.7%	20.8%	Romania	69.7%	19.2%	11.1%

Organisations reporting about alternative communication behaviours among different age groups tend to use specific strategies and media



www.communicationmonitor.eu / Zerfass et al. 2013 / n = 2,486 PR professionals. Q 11: Audience research suggests that people have different media preferences and communication behaviours depending on their age group. Do you experience such differences among the stakeholders of your organisation or clients? Q 13: Has your organisation developed strategic communication programmes or PR campaigns which target different generations with different media? Highly significant correlations for all items (chi-square test, $p \leq 0.01$, Cramers V = 0.239).



International communication

Chapter overview

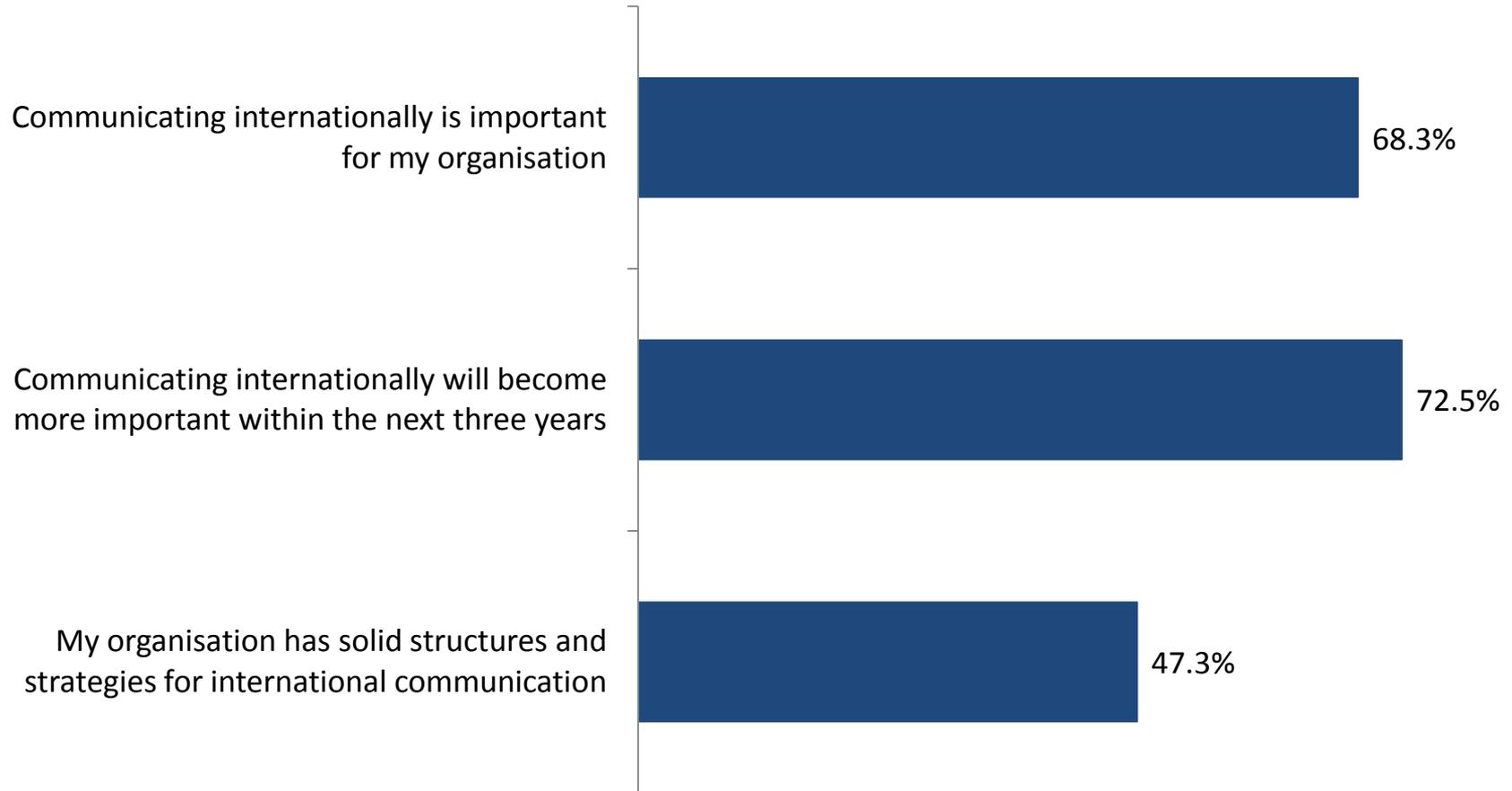
Crossing borders both privately and professionally is something that is familiar to most practitioners working in a European context. We clearly live in a multicultural world and communication managers are in the business of intercultural mediation. Wherever we live, we are exposed to other cultures. As a consequence academics argue intercultural competency is a necessary requirement for all workers and is not limited to those who work in different countries (Davies et al., 2011). The management of communication and relationships is directly concerned with the management of cultural differences (Tench & Yeomans, 2013).

The ECM 2013 data shows that international communication is considered a part of daily business for eight out of ten professionals surveyed. Furthermore, when asked about the importance of international communication a majority responded that it was important for their organisations (68.3 per cent). This re-affirms Bücken and Poutsma's (2010) claim that managers who demonstrate intercultural competence are more likely to be able as well as to attract and work with relevant stakeholders such as partners and clients. In addition, 72.5 per cent of the ECM respondents acknowledge that communicating internationally will become more important in the next three years. In sharp contrast to this, only a minority of organisations (47.3 per cent) has already developed solid structures and strategies for international communication. This seems to be a major field of development within the practice in the near future.

Context matters though for international interaction and those practitioners working in non-profit and governmental organisations are less likely to practice internationally. From the respondents who do have an international outreach with their work, the majority are doing so with more than five countries and nearly a quarter with over 20 countries. This reflects the complex, multinational world communication practitioners are working in and the subsequent demand this places on their cross and intercultural skills and awareness. It is in this way that Verčič (2013) argues for the potential for public relations practitioners to act and perform like 'intercultural interpreters'.

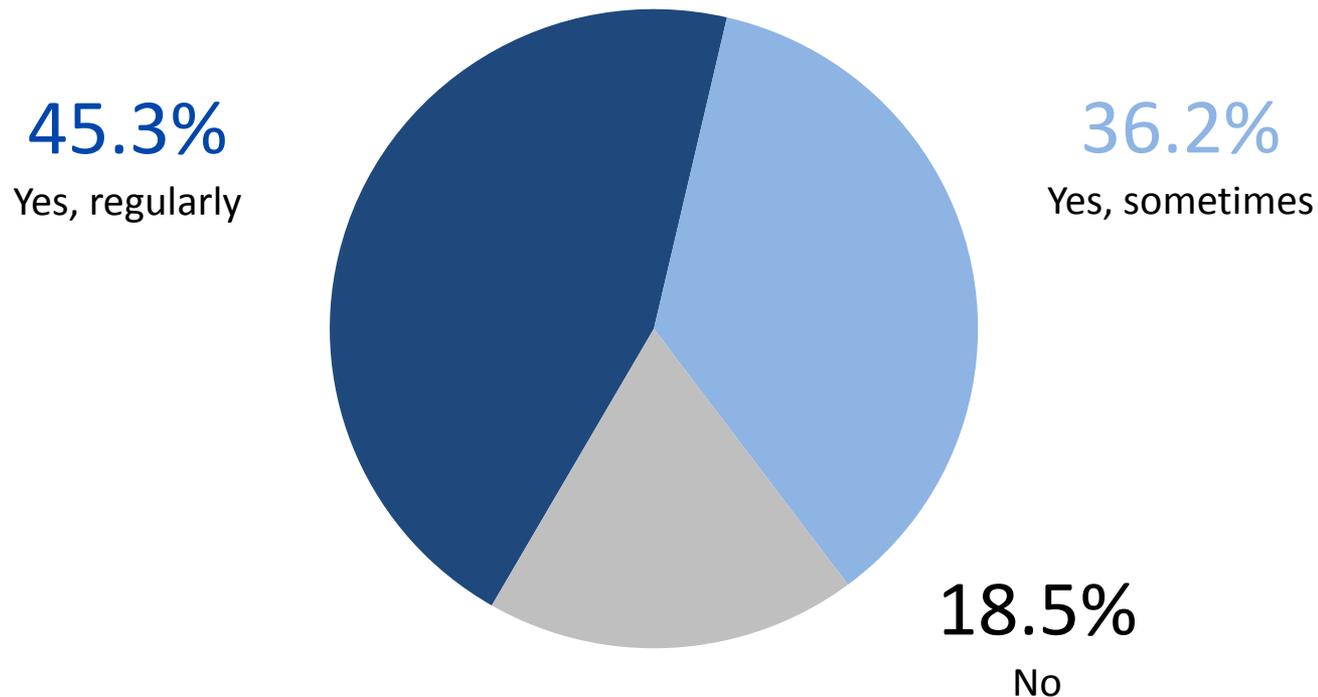
Perhaps inevitably given the ECM sample, the majority of targeted international communication activity is within Europe (98.8 per cent), with North America the next highest response (42.2 per cent), followed in third place by East Asia (28.3 per cent) which takes in China, Korea, Japan as major countries. Focusing on strategic communication internationally and outside Europe respondents were asked to name the most challenging issues at hand. The leading three were: Developing communication strategies with social, cultural and political sensitivity (73.7 per cent), monitoring public opinion and understanding stakeholders (72.2 per cent), and understanding structures of media systems and public spheres (67.5 per cent). These are pragmatic and analytical topics, underlining the early status of institutionalisation in this field. Management-oriented challenges like implementing management structures for international communication (which were reported as missing by a majority), hiring and leading professionals or working with agencies in foreign countries are mentioned by a lower, but still relevant, number of respondents (between 42.9 and 51.2 per cent).

International communication is important and will grow in the future, but organisational structures and strategies are often missing

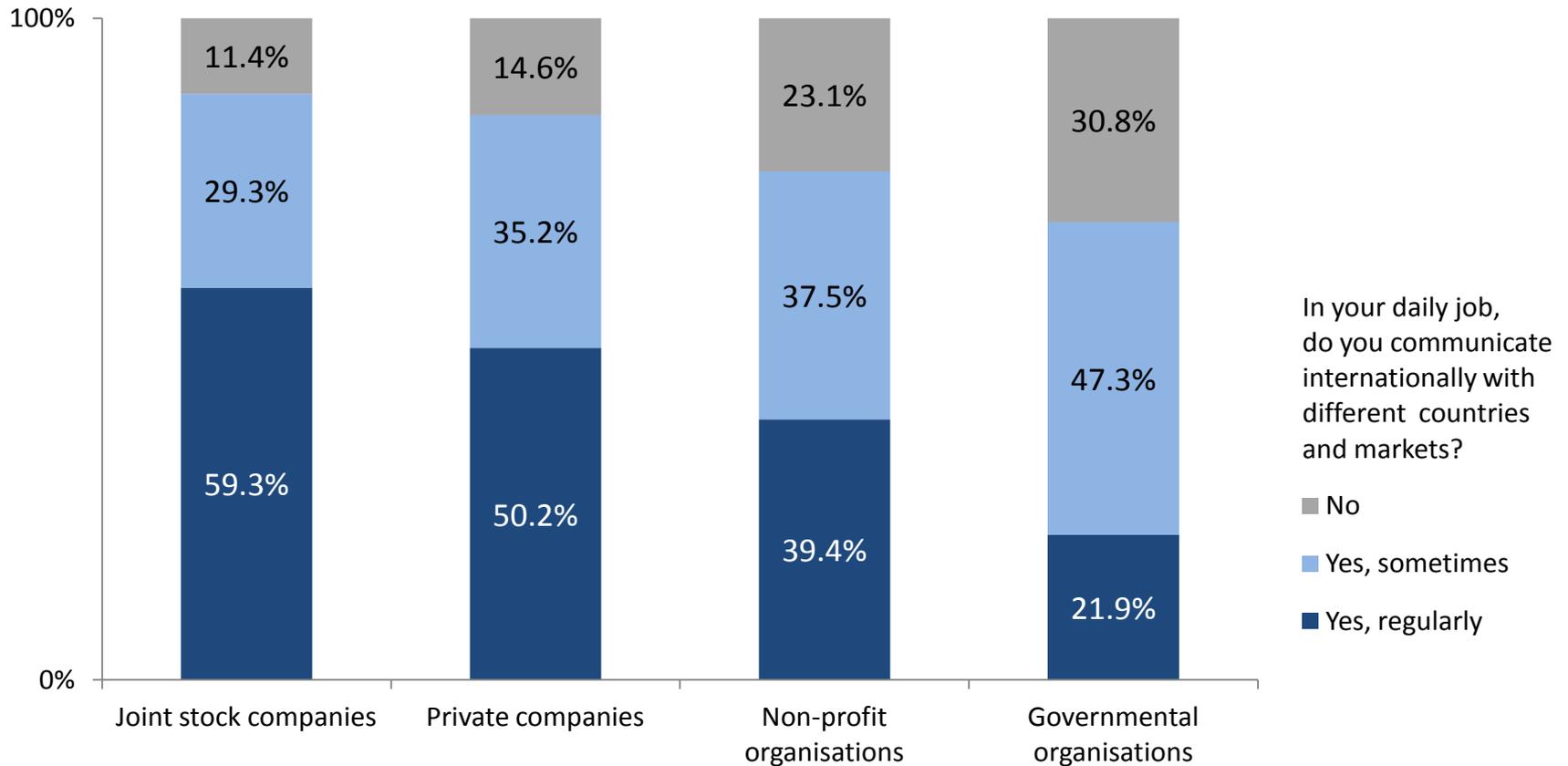


International communication is part of the daily business
for 8 out of 10 professionals working in communication departments

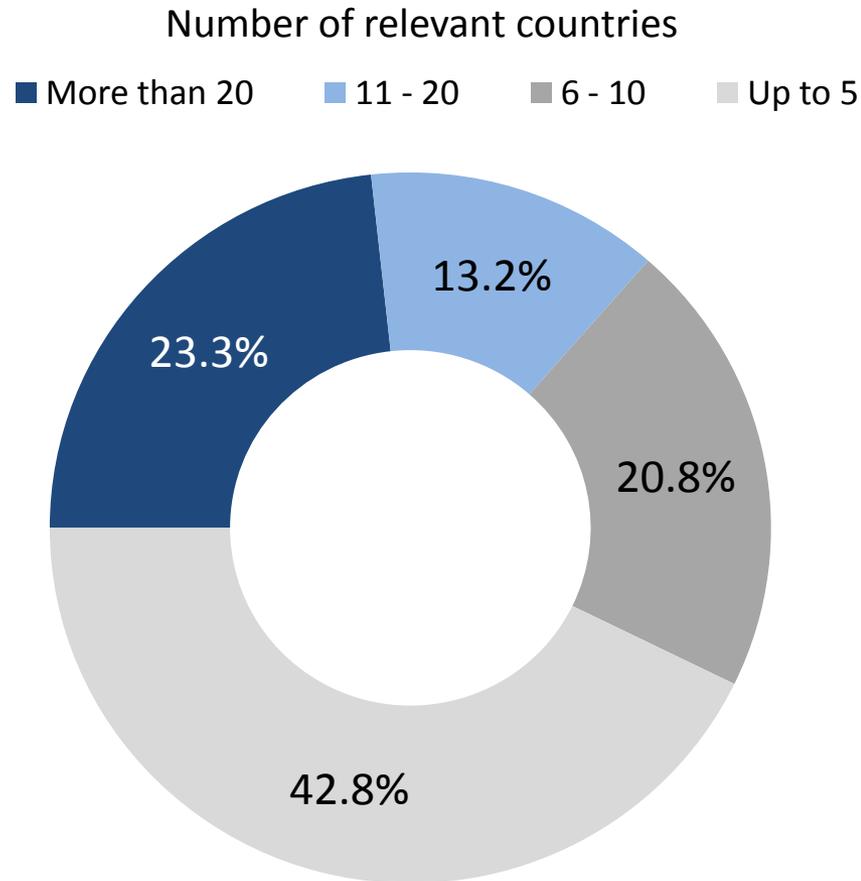
*In your daily job, do you communicate internationally
with different countries and markets?*



Professionals working in non-profit and governmental organisations are practising international communication less often and less intensively



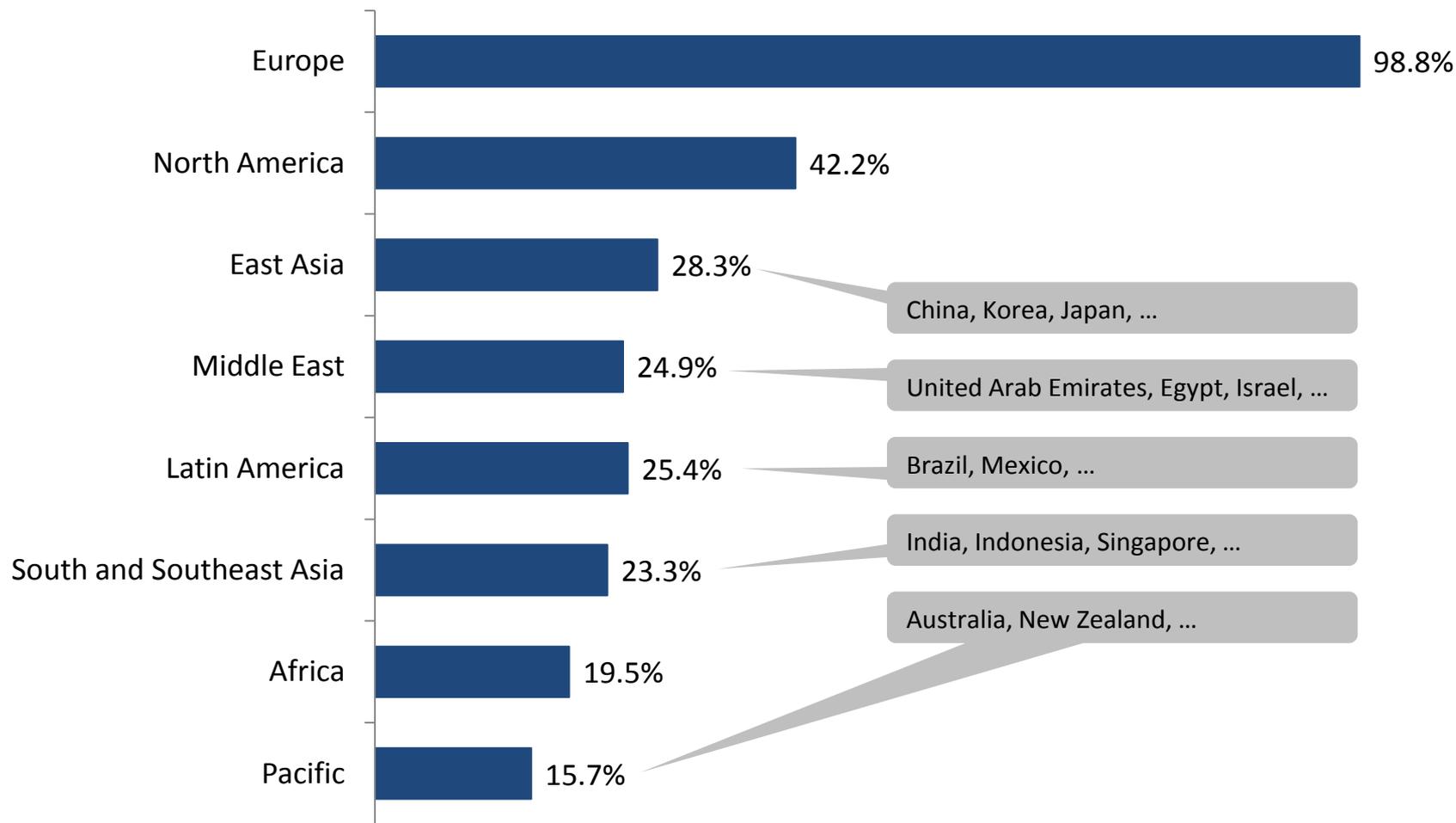
A majority of communication professionals with international outreach deals with more than five countries



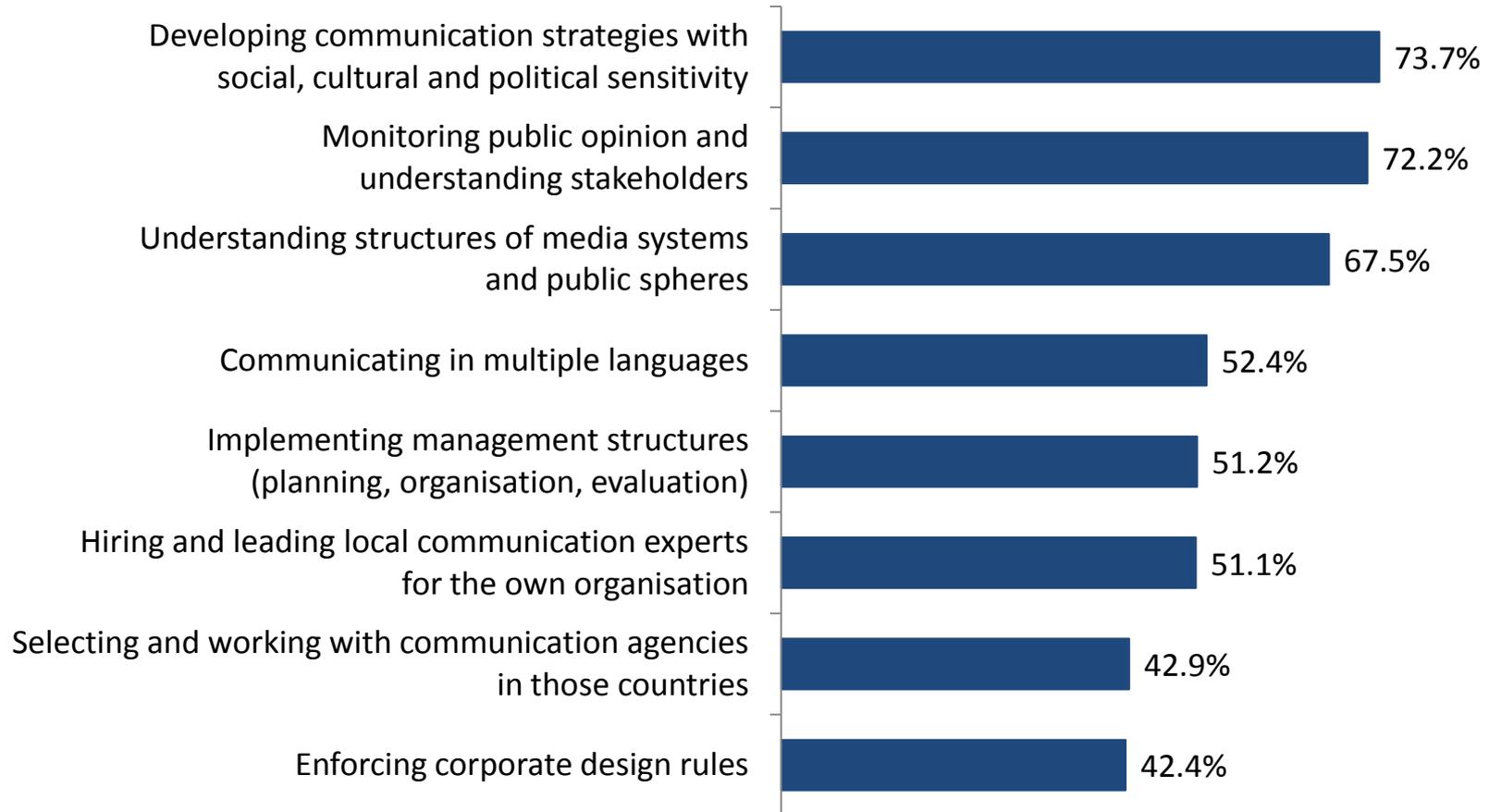
Number of relevant countries for international communication across Europe

	More than 20	11 - 20	6 - 10	Up to 5		More than 20	11 - 20	6 - 10	Up to 5
Germany	30.0%	17.3%	25.5%	27.3%	Finland	25.4%	13.6%	28.8%	32.2%
Austria	23.2%	15.9%	21.7%	39.1%	Spain	8.0%	17.0%	10.2%	64.8%
Switzerland	44.6%	13.9%	20.8%	20.8%	Portugal	22.5%	15.0%	17.5%	45.0%
France	42.9%	17.5%	23.8%	15.9%	Italy	22.2%	8.9%	17.8%	51.1%
Belgium	47.5%	20.8%	12.9%	18.8%	Slovenia	14.5%	9.1%	20.0%	56.4%
Netherlands	25.0%	11.3%	22.6%	41.1%	Croatia	6.7%	10.0%	23.3%	60.0%
United Kingdom	28.6%	14.3%	22.2%	34.9%	Serbia	0.0%	2.6%	26.3%	71.1%
Denmark	27.1%	10.4%	20.8%	41.7%	Poland	9.4%	12.5%	18.8%	59.4%
Sweden	25.6%	24.4%	19.5%	30.5%	Czech Republic	16.0%	4.0%	16.0%	64.0%
Norway	13.9%	11.1%	18.1%	56.9%	Romania	7.6%	12.1%	13.6%	66.7%

Regions targeted by international communication activities



Major challenges of international communication in non-European countries



Challenges of international communication in different types of organisations

	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations	Overall
Developing communication strategies with social, cultural and political sensitivity	73.4%	73.6%	74.9%	73.3%	73.7%
Monitoring public opinion and understanding stakeholders	71.1%	73.9%	72.4%	71.9%	72.2%
Understanding structures of media systems and public spheres*	65.1%	73.1%	66.8%	64.5%	67.5%
Implementing management structures (planning, organisation, evaluation)	49.5%	52.3%	53.6%	51.1%	51.2%
Communicating in multiple languages	50.3%	49.5%	61.3%	52.3%	52.4%
Hiring and leading local communication experts for the own organisation	51.2%	51.0%	51.9%	50.0%	51.1%
Selecting and working with communication agencies in those countries**	38.4%	45.8%	44.8%	47.1%	42.9%
Enforcing corporate design rules	43.4%	43.2%	40.5%	40.6%	42.4%

www.communicationmonitor.eu / Zerfass et al. 2013 / n = 1,324 PR professionals in communication departments who are communicating internationally in their daily job. Q 22: How challenging are the following aspects when communicating internationally, especially in non-European countries? Scale 1 (not challenging) – 5 (very challenging). Percentages: Agreement based on scale points 4-5. ** Highly significant correlations (chi-square test, $p \leq 0.01$). * Significant correlations (chi-square test, $p \leq 0.05$).



Crisis communication

Chapter overview

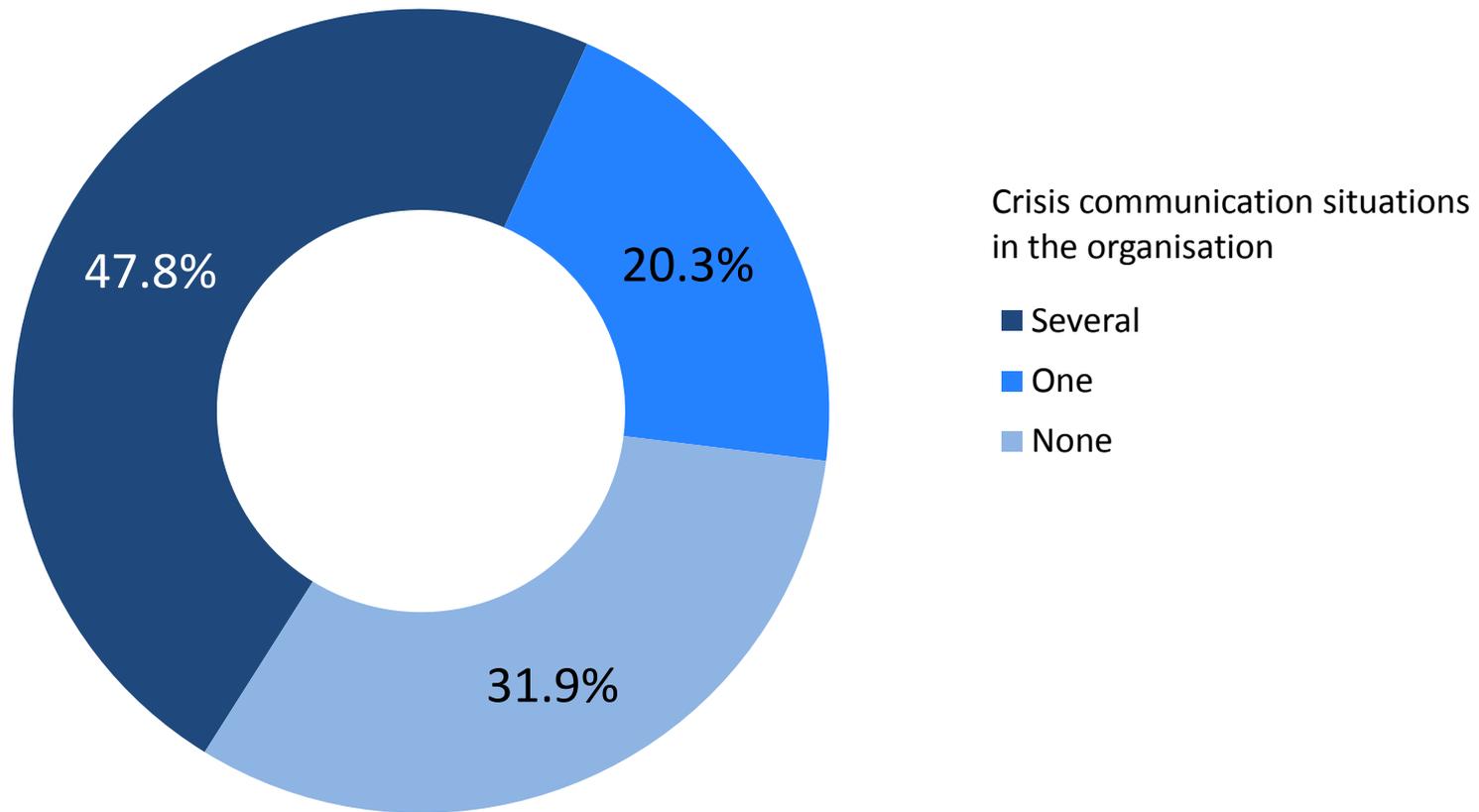
A crisis can be defined as “the perception of an unpredictable event that threatens important expectancies of stakeholders and can seriously impact an organisation’s performance and generate negative outcomes” (Coombs, 2012: 2). With European economies continuing to face challenging economic times this year’s ECM survey included a focus on crises for organisations across the 43 countries in the study. From the respondents seven out of ten reported that they had dealt with a crisis situation in their organisation in the previous 12 months. Of the sample nearly half had dealt with more than one crisis.

Looking at the detail of the responses it is notable that crises are more prevalent for practitioners working in the business sector and that frequently consultants are brought in to help the in-house communicators to deal with and manage crisis scenarios. Crises research shows that response strategies have to be aligned to the type of crisis situation (Seeger et al., 2003). The top three most reported types of crisis were institutional crises (defined as adverse campaigns against the organisation by critics, threats of political regulation or intervention or hostile takeovers), performance crises (e. g. product or service failure or production error), and management or leadership crises. This crisis type involves either compliance problems or ethical malpractice or issues related to the succession for top management roles. When broken down by sector, institutional crises and leadership crises are most prevalent for non-profit organisations while private companies face more issues related to performance and finances.

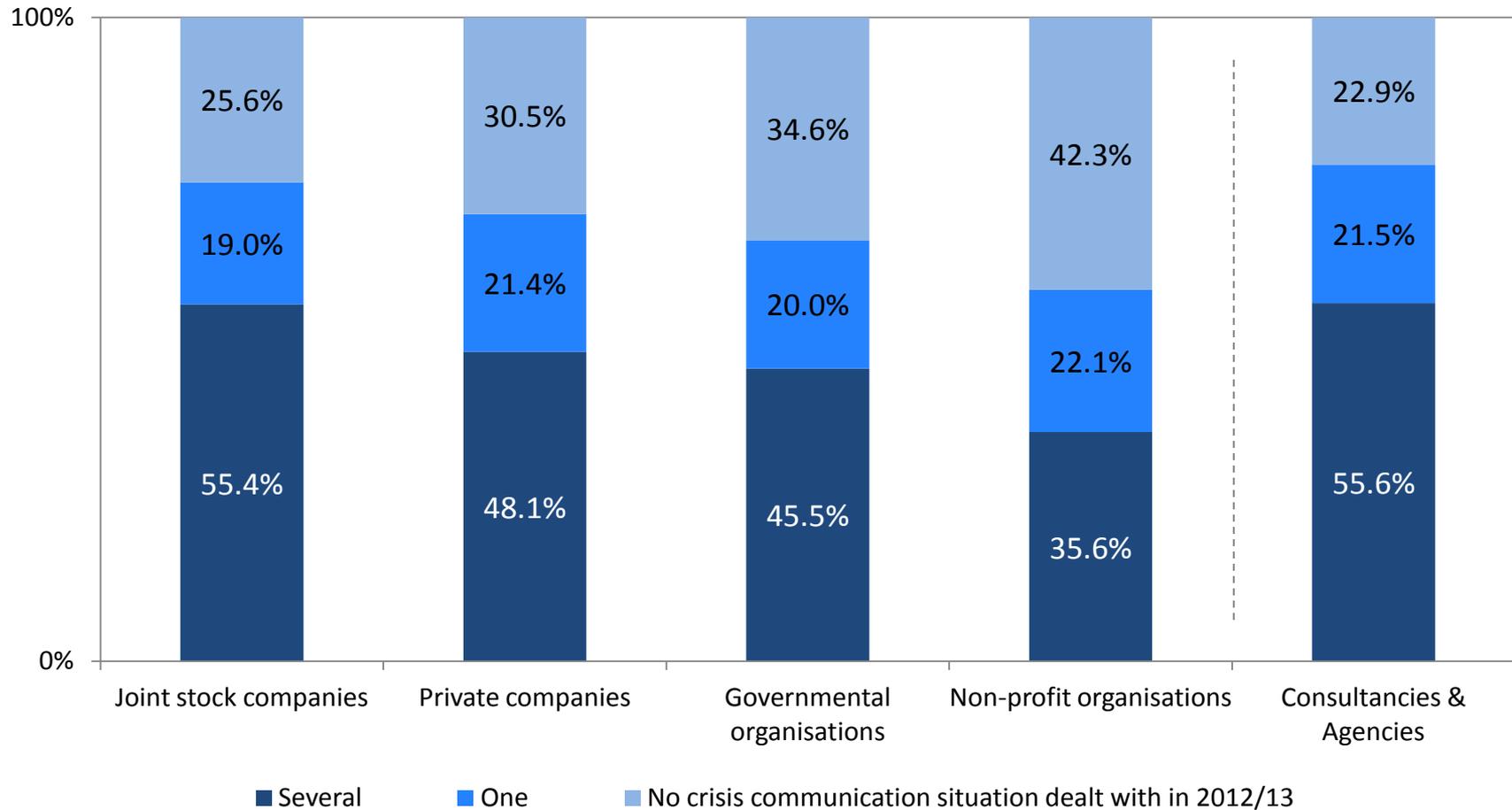
The key difference between effective and ineffective crisis communication management is strategic thinking. Effective crisis communication is built on a foundation of preparation that is informed by research. When a crisis hits, managers have practiced handling similar situations and understand what actions should help and which could hurt in the crisis situation (Coombs, 2010). When applied to the ECM 2013 data the most used strategy by professional communicators in Europe is the information strategy (82.7 per cent) whereby practitioners use their role to provide relevant stakeholders with information, facts and figures, explaining the context and next steps for managing the scenario for and on behalf of the organisation.

When reporting about the tools used in crisis communication during the last year the respondents clearly highlighted media relations (75.7 per cent) and personal communication (72.6 per cent). Stunningly, only four out of ten respondents (38.2 per cent) mention social media channels – although many crises are nowadays enforced by news and rumours spreading on the web. Furthermore, the type of crisis does have a bearing on the strategy employed to deal with it. For example the information strategy is most prevalent with all crises. But, quite naturally, performance and industrial relations crises also utilise sympathy strategies to support. Along this line, communication instruments seem to be of different value for various crisis communication strategies. Media relations is used most often in defence activities, while personal communication with key stakeholders is the preferred choice when trying to raise sympathy for the target organisation. The empirical results prove that effective crisis communication involves a range of situational strategies and instruments. This contrasts with the many pragmatic solutions offered by some consultants and various practitioner handbooks.

Seven out of ten communication professionals in Europe have faced crisis communication situations during the last year



Crisis communication is more prevalent in the business sector – professionals working in consultancies are often asked to help

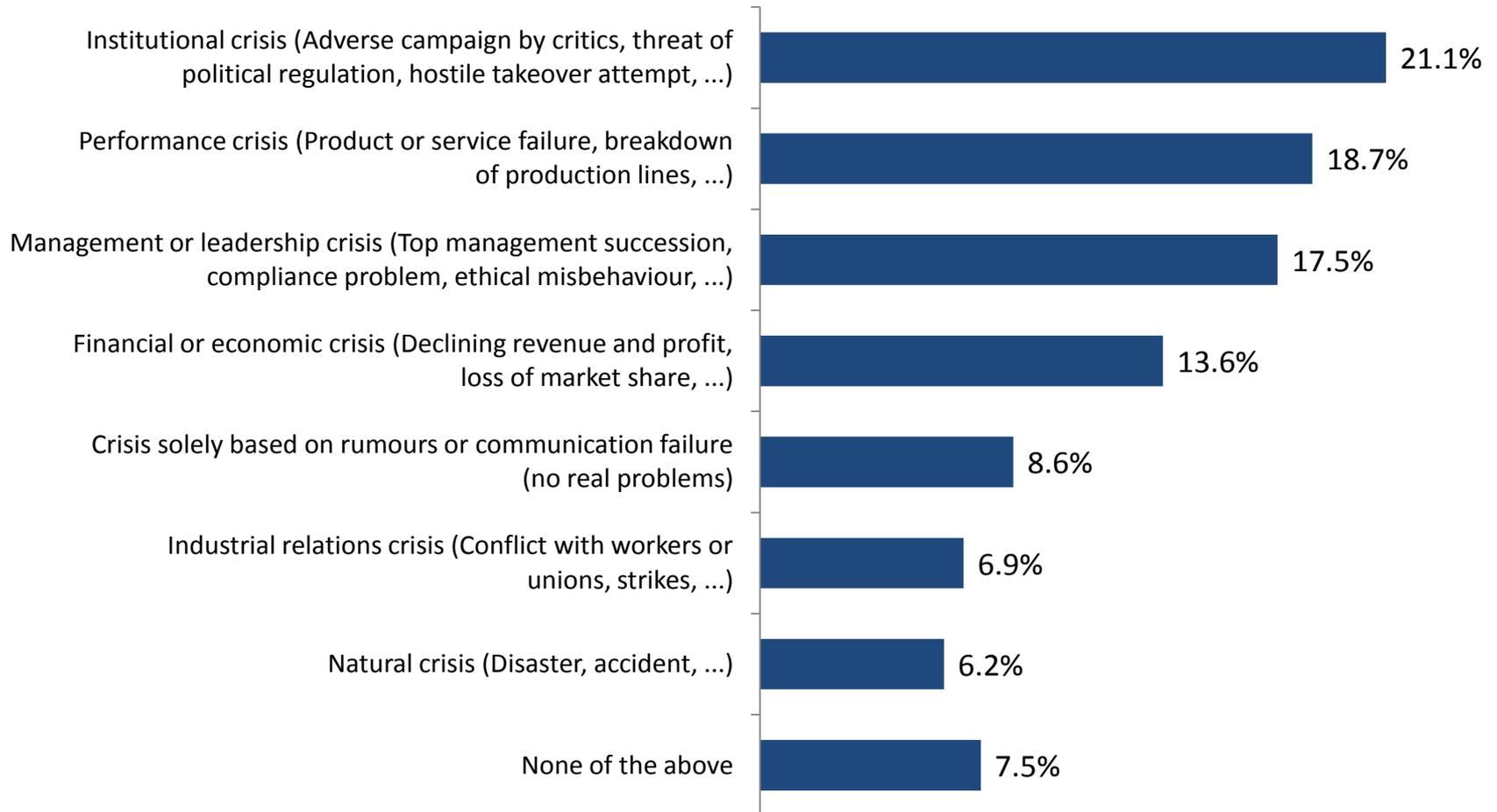


Instances of crisis communication situations in organisations across Europe

	Several	One	None		Several	One	None
Germany	52.9%	21.5%	25.6%	Finland	33.3%	33.3%	33.3%
Austria	46.5%	16.3%	37.2%	Spain	49.1%	22.2%	28.7%
Switzerland	42.6%	18.0%	39.3%	Portugal	43.1%	23.5%	33.3%
France	46.6%	20.5%	32.9%	Italy	39.0%	31.4%	29.5%
Belgium	28.9%	23.7%	47.4%	Slovenia	62.7%	20.9%	16.4%
Netherlands	45.0%	17.2%	37.9%	Croatia	60.5%	18.4%	21.1%
United Kingdom	51.6%	20.8%	27.7%	Serbia	56.0%	22.0%	22.0%
Denmark	54.0%	19.0%	27.0%	Poland	44.4%	28.9%	26.7%
Sweden	46.7%	21.0%	32.4%	Czech Republic	51.9%	17.7%	30.4%
Norway	39.8%	16.3%	43.9%	Romania	51.7%	6.9%	41.4%

Types of crises challenging communication managers in Europe

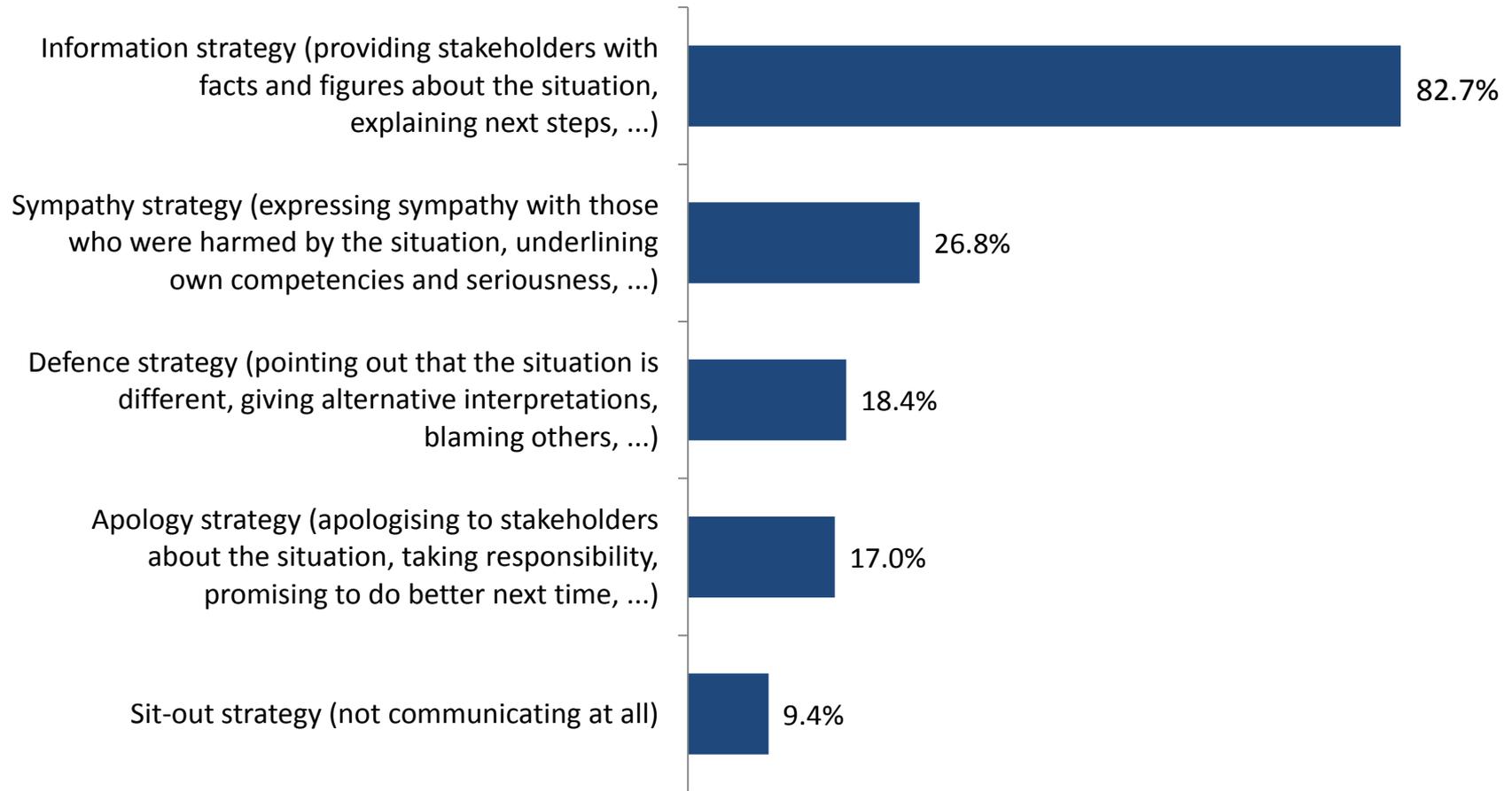
Most important crisis situation



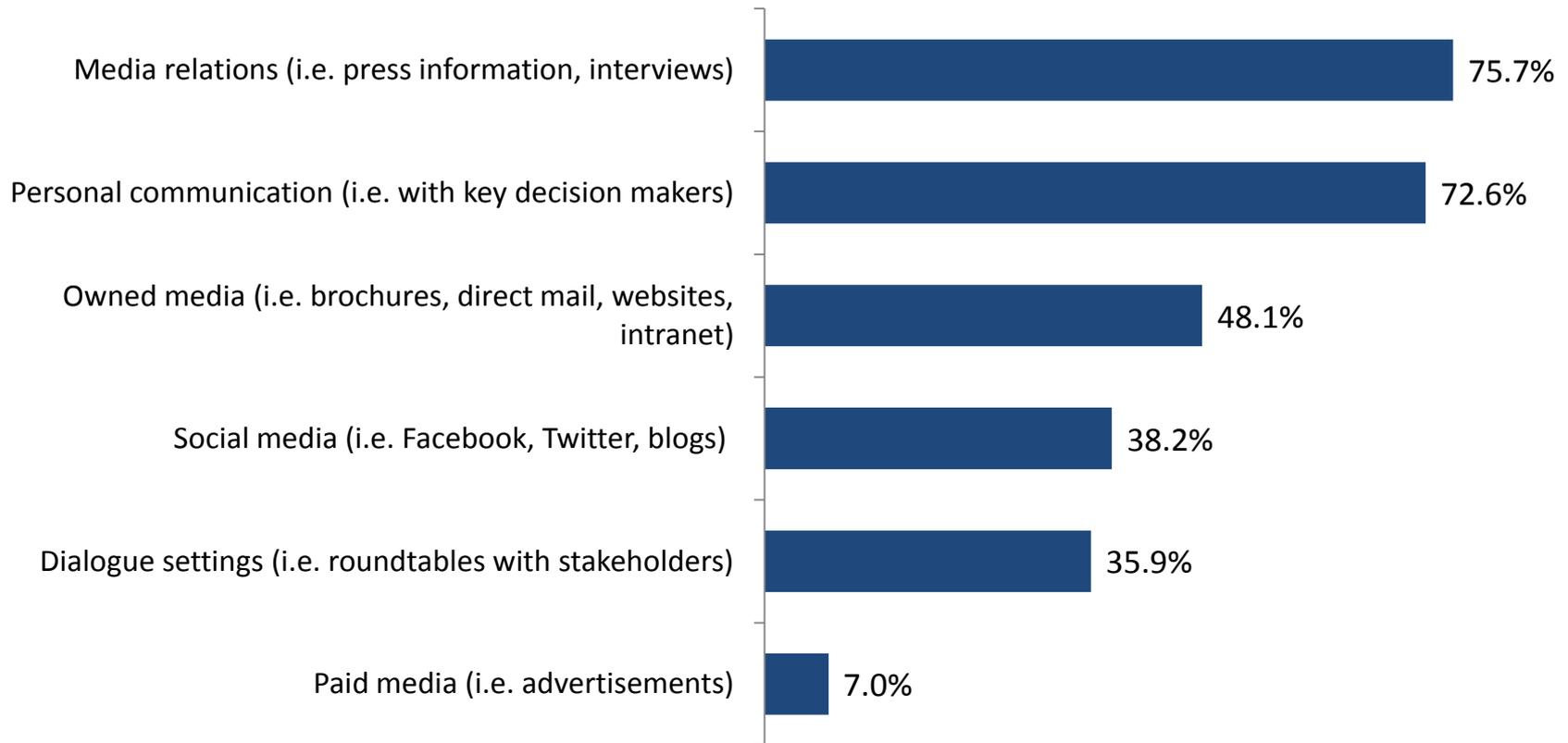
Institutional crises and leadership crises are most important for non-profits; crises in private companies are often related to issues of performance and finances

	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations
Institutional crisis (Adverse campaign by critics, threat of political regulation, hostile takeover attempt, ...)	20.3%	16.0%	23.6%	27.8%
Performance crisis (Product or service failure, breakdown of production lines, ...)	20.7%	23.3%	17.0%	8.3%
Management or leadership crisis (Top management succession, compliance problem, ethical misbehaviour, ...)	15.2%	16.9%	19.3%	21.5%
Financial or economic crisis (Declining revenue and profit, loss of market share, ...)	14.6%	17.2%	8.5%	12.7%
Crisis solely based on rumours or communication failure (No real problems)	6.7%	9.4%	8.9%	11.7%
Natural crisis (Disaster, accident, ...)	7.0%	3.6%	10.8%	5.9%
Industrial relations crisis (Conflict with workers or unions, strikes, ...)	8.7%	6.6%	3.0%	3.9%
None of the above	6.7%	6.9%	8.9%	8.3%

Crisis communication strategies used by European organisations: Providing facts and figures clearly dominates



Instruments and channels used for crisis communication: Media relations and personal communication in the front line



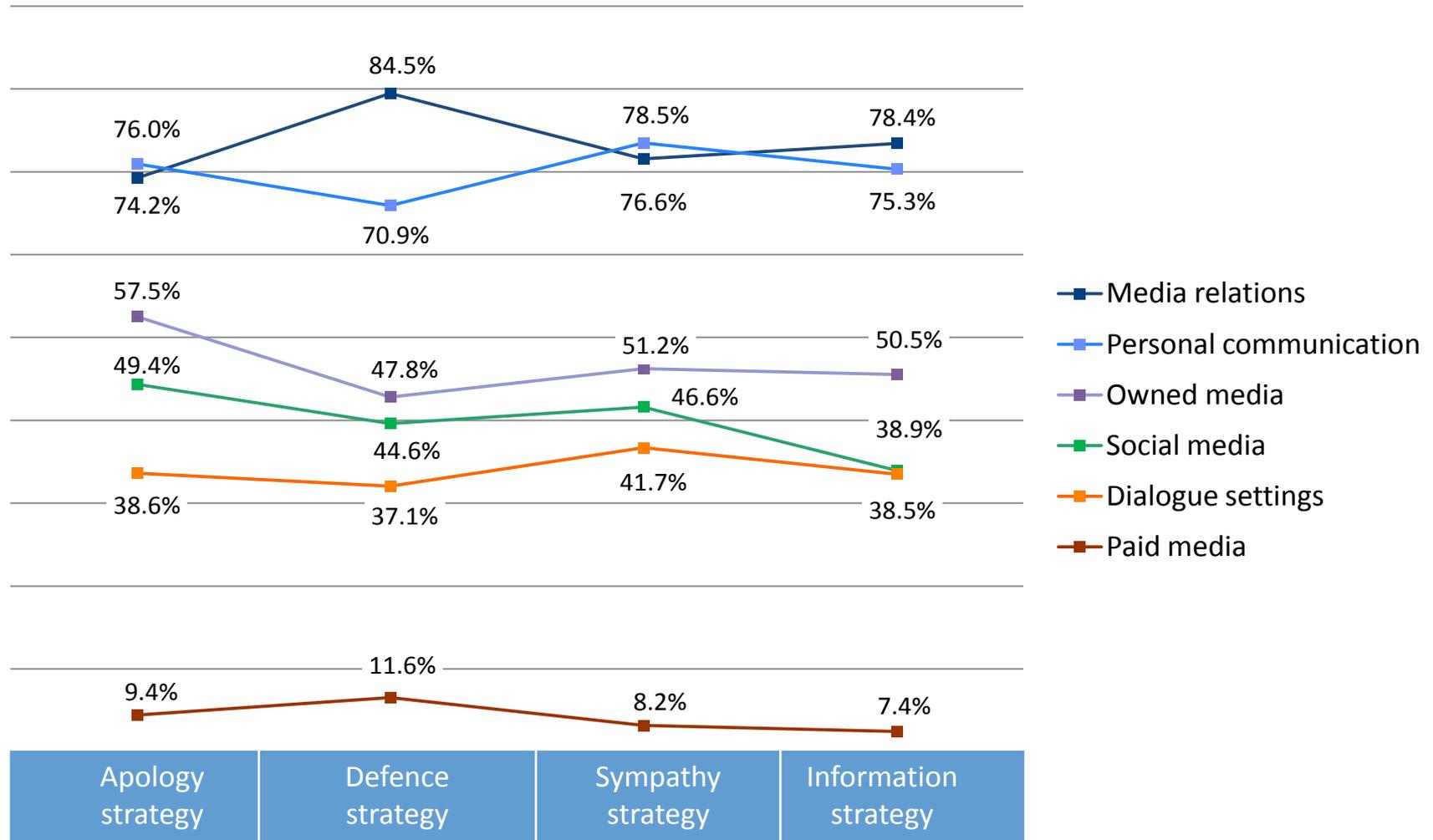
Crisis communication strategies used in different crisis situations

	Information strategy	Sympathy strategy	Defence strategy	Apology strategy	Sit-out strategy
Institutional crisis	86.2%	20.1%	27.3%	10.0%	11.4%
Performance crisis	74.9%	37.3%	16.9%	36.1%	5.1%
Management or leadership crisis	78.2%	19.7%	19.2%	23.0%	13.8%
Financial or economic crisis	86.0%	21.0%	13.4%	8.1%	7.5%
Crisis solely based on rumours or communication failure	78.6%	23.9%	18.8%	12.8%	10.3%
Natural crisis	91.5%	41.5%	6.4%	8.5%	3.2%
Industrial relations crisis	84.7%	37.6%	18.8%	5.9%	12.9%

Communication instruments used in different crisis situations

	Media relations	Personal communication	Owned media	Social media	Dialogue settings	Paid media
Institutional crisis	84.3%	77.4%	42.2%	41.1%	41.8%	9.4%
Performance crisis	76.6%	72.6%	50.0%	44.4%	31.7%	6.0%
Management or leadership crisis	72.3%	69.7%	49.8%	29.0%	34.2%	7.8%
Financial or economic crisis	68.6%	68.1%	57.3%	30.3%	38.4%	9.7%
Crisis solely based on rumours or communication failure	63.7%	72.6%	38.9%	46.0%	31.0%	8.0%
Natural crisis	85.1%	73.4%	48.9%	44.7%	23.4%	2.1%
Industrial relations crisis	71.8%	70.6%	42.4%	29.4%	47.1%	1.2%

Communication instruments and crisis communication strategies



www.communicationmonitor.eu / Zerfass et al. 2013 / n = 1,367 PR professionals in communication departments reporting a crisis situation during the last year. Q 4: Which kind of communication strategies were used in this most important crisis situation? Multiple answers possible. Q 5: Which kind of communication instruments were used in this most important crisis situation? Multiple answers possible.



Strategic issues and influence

Chapter overview

The most important strategic issue for European communication professionals until 2016 is aligning communication strategies to overall business strategies. 42.7 per cent of the respondents mention this as the most important topic, an issue that has been in the top 5 in the ECM surveys for years. Last year's number 1, coping with the digital evolution and the social web, comes second this year with 41.8 per cent of the respondents mentioning this as a top priority. Coming third is the necessity to build and maintain trust with the public and society (38 per cent), followed by matching the need to address more audiences and channels with limited resources (34.9 per cent), and strengthening the role of the communication function in supporting top-management decision making (32.6 per cent). New issues in the ECM 2013, but relatively low in ranking, are interacting with new gatekeepers and audiences and responding to their communication needs (19 per cent), and enhancing international and intercultural communication (11.3 per cent). Handling the challenges of data protection, its storage and use, a major topic when thinking of the debate on big data (Liebowitz, 2013) and what this might mean for reputation management, is rated important by a very small group of respondents (5.5 per cent).

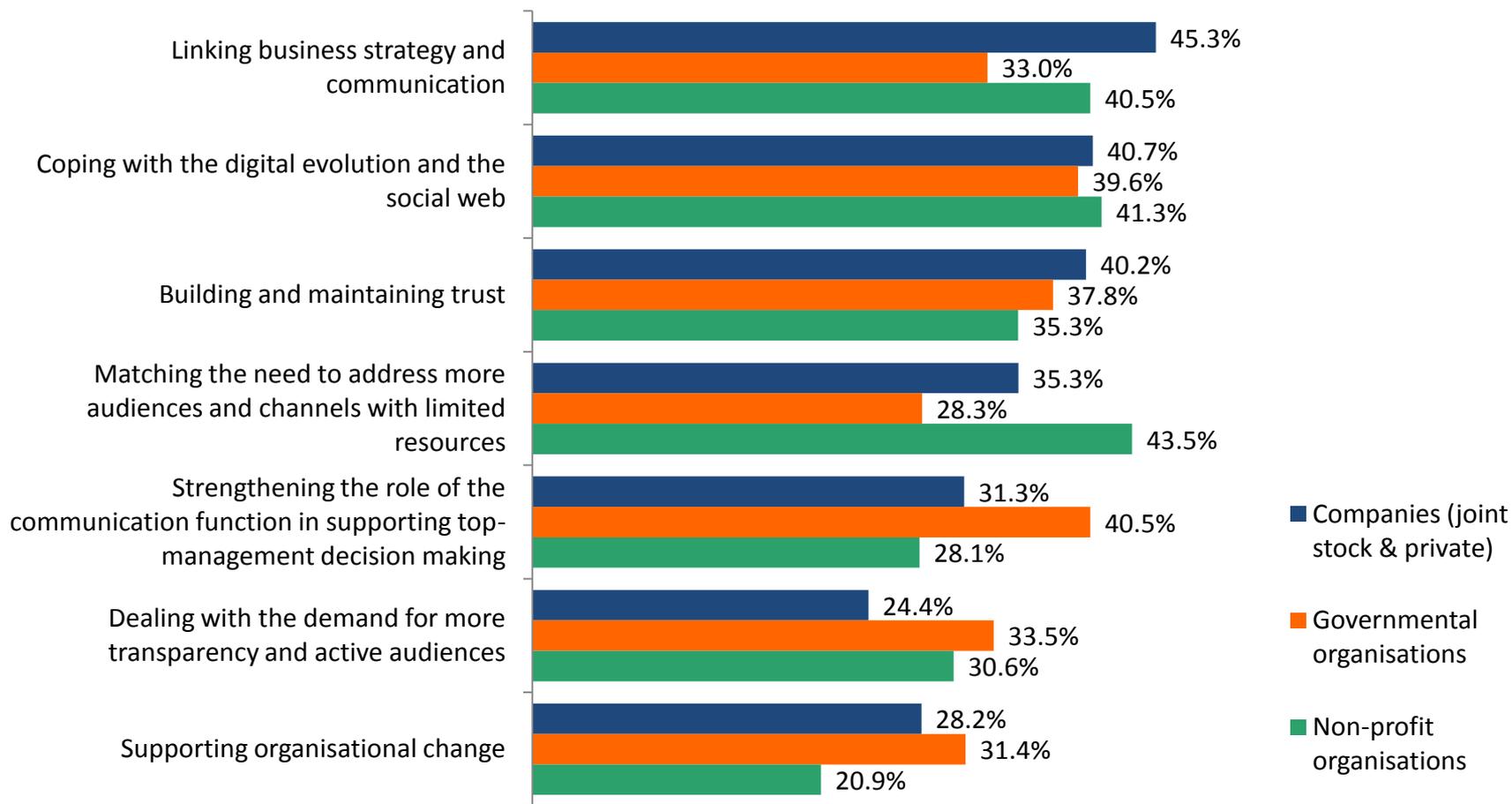
The distribution of top issues differs within the different types of organisations. In private and joint stock companies linking business and communication is considered to be the most important, in governmental organisations strengthening the role of the communication function in supporting top-management decision making and professionals working in non-profits focus mainly on matching the needs of more audiences and channels with limited resources. Looking at the development of the importance of strategic issues over the last three years we see that the alignment of communication and business goals as well as new media are the top issues all these years. Despite the continuing debate on CSR communication (Ihlen et al., 2011), dealing with sustainable development and social responsibility is falling in importance according to the results of this survey. This trend has already been identified last year (Zerfass et al., 2012: 56). It can be interpreted in two ways. Professionals might have found proper strategies and ways how to communicate in this field, so it is less challenging now, or CSR has been overvalued in the past and a more realistic view is prevailing now.

In 2013 both advisory influence, that is the perception of how seriously senior managers take the recommendations of communication professionals in Europe, and executive influence, that is the perception of how likely it is that communication will be invited to senior-level meetings dealing with organisational strategic planning, have increased again, after a decrease last year. Perception of advisory influence is highest in joint stock companies (83.4 per cent), followed by non-profit organisations and private companies (both 78.5 per cent) and lowest in governmental organisations (74.7 per cent). Executive influence is highest in non-profit organisations (78.2 per cent), followed by joint stock companies (78 per cent), private companies (74.2 per cent) and is also lowest in governmental organisations (71.5 per cent).

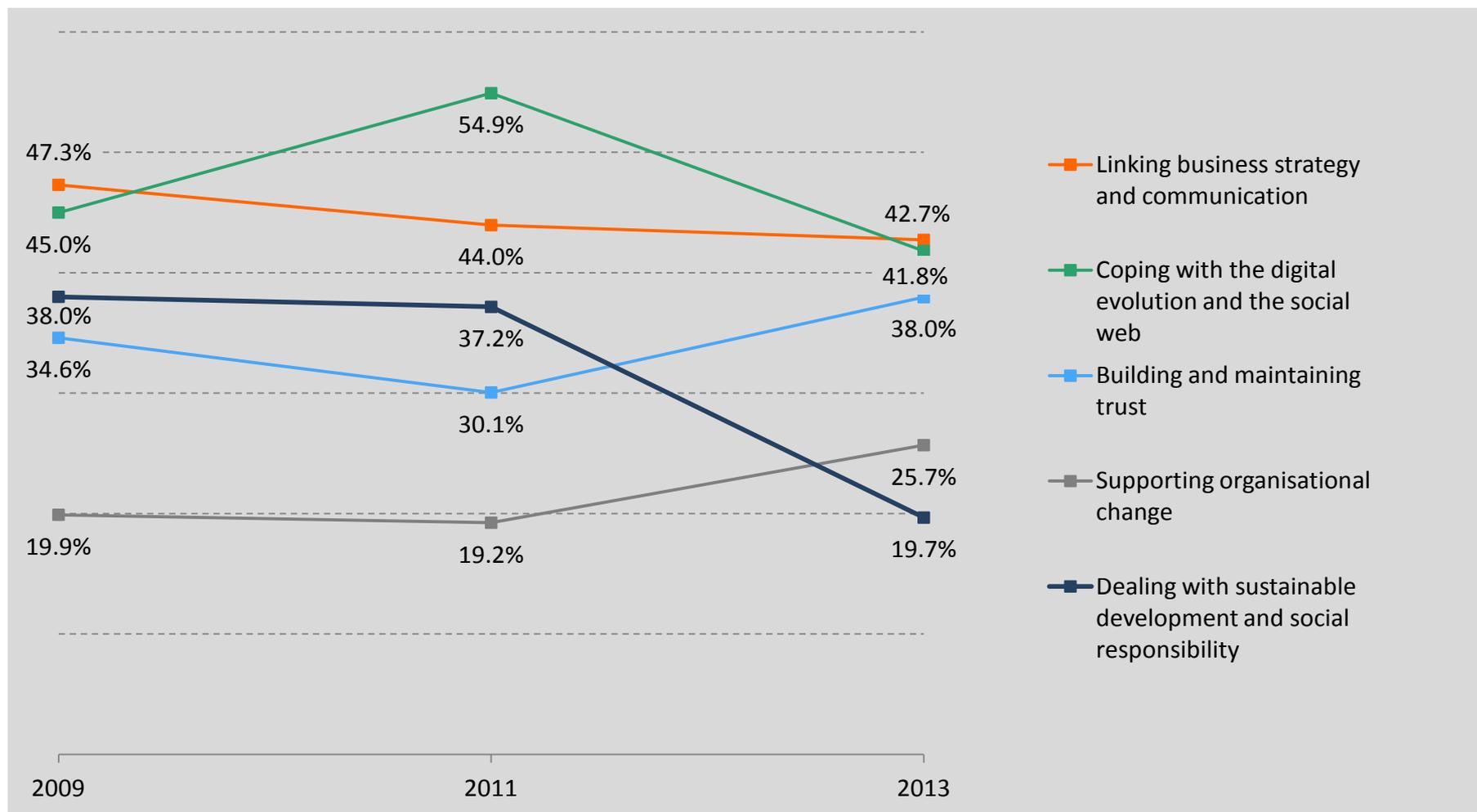
Most important issues for communication management in Europe until 2016



Importance of selected issues in various types of organisations



Development of strategic issues during the last years



Perceived influence of the communication function

Advisory influence



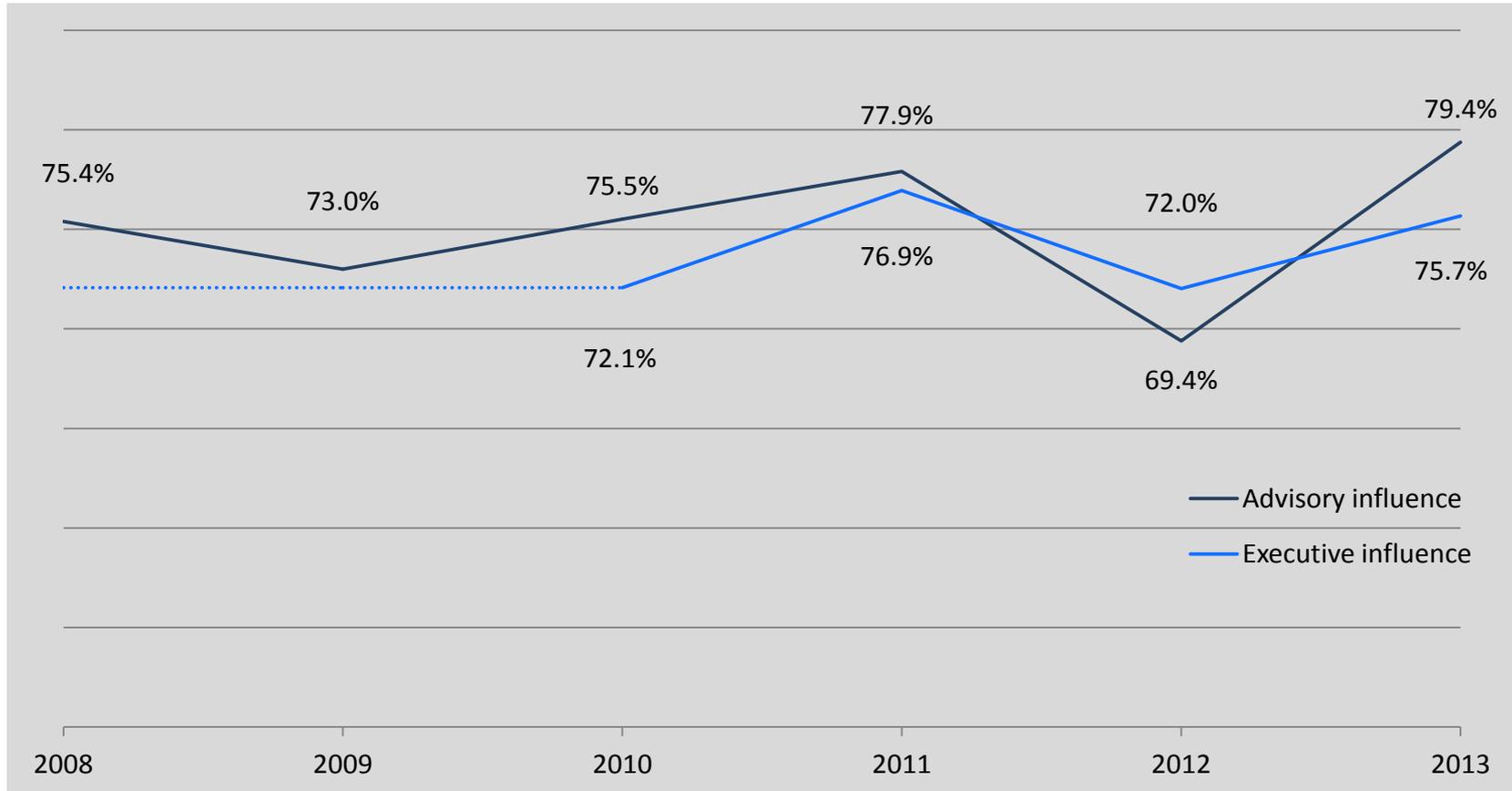
In **79.4%** of European organisations, recommendations of the communication function are taken seriously by senior management

Executive influence



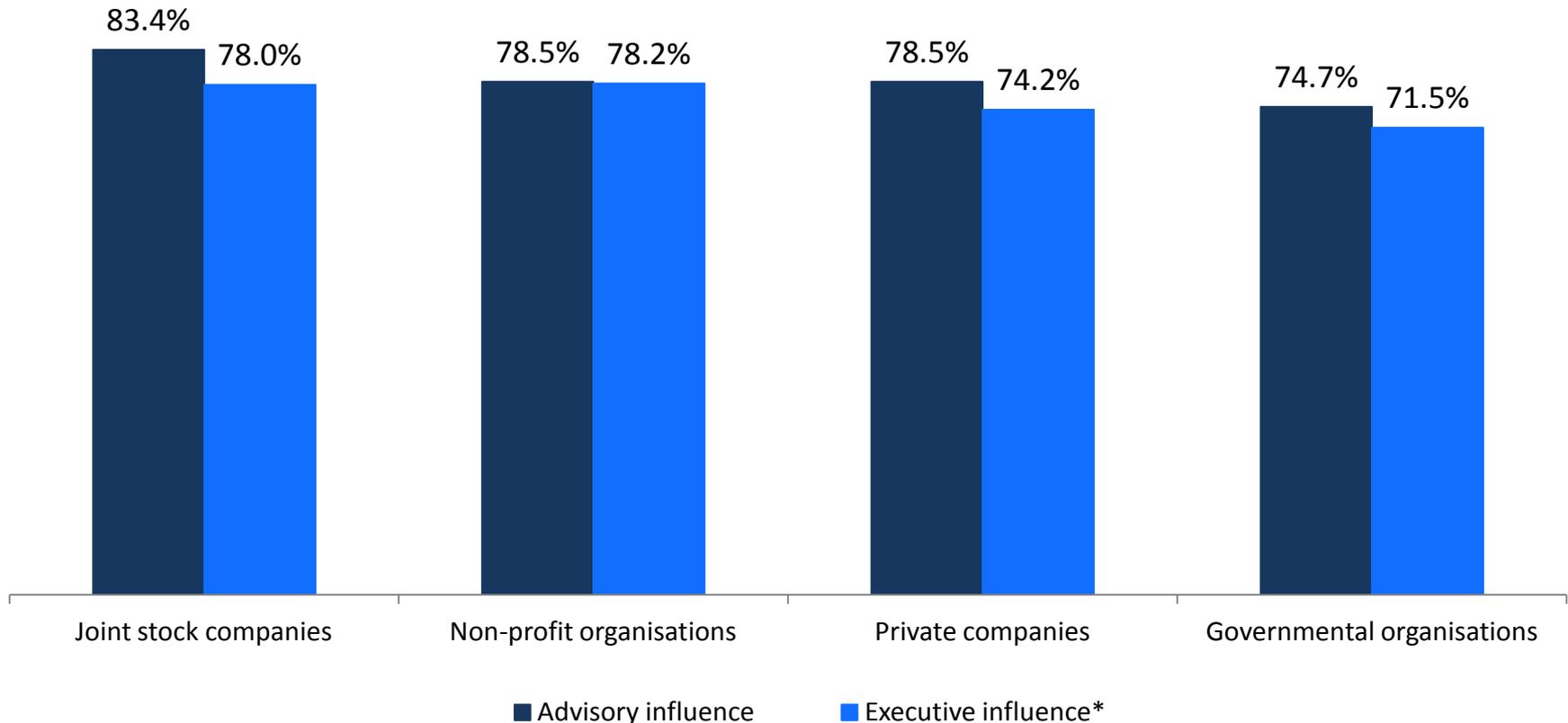
In **75.7%** of European organisations, the communication function is likely to be invited to senior-level meetings dealing with organisational strategic planning

Perception of advisory and executive influence is changing over the years



www.communicationmonitor.eu / Zerfass et al. 2013 / n = 2,027 PR professionals in communication departments. Q 25, Q 26. Zerfass et al. 2012 / n = 1,702. Q 26, Q 27. Zerfass et al. 2011 / n = 1,449. Q 7. Zerfass et al. 2010 / n = 1,511. Q 4. Zerfass et al. 2009 / n = 1,267. Q 3. Zerfass et al. 2008 / n = 1,027. Q1. Advisory influence, Q: In your organisation, how seriously do senior managers take the recommendations of the communication function? Scale 1 (not seriously) – 7 (very seriously). Executive influence, Q: How likely is it, within your organisation, that communication would be invited to senior-level meetings dealing with organisational strategic planning? Scale 1 (never) – 7 (always). Percentages: Influence reported, based on scale points 5-7.

Influence of the communication function in different types of organisations



www.communicationmonitor.eu / Zerfass et al. 2013 / n = 2,027 PR professionals in communication departments. Advisory influence, Q 25: In your organisation, how seriously do senior managers take the recommendations of the communication function? Scale 1 (not seriously) – 7 (very seriously). Executive influence, Q 26: How likely is it, within your organisation, that communication would be invited to senior-level meetings dealing with organisational strategic planning? Scale 1 (never) – 7 (always). Percentages: Agreement based on scale points 5-7. * Significant correlations (chi-square test, $p \leq 0.05$).



Status, budgets and perspectives

Chapter overview

The turbulent economic and political situation in Europe has provided threats and opportunities for strategic communication. While it seems harder than ever to gain resources, many organisations have realised that communication can help to gain trust and facilitate new partnerships in times of transition. The latter seems to be a major trend. In the ECM 2013, 87 per cent of the communication professionals working in communication departments state that communication has become more important for the overall success of their organisation within the last year. This positive development is visible all over Europe, with Austria, Norway, the United Kingdom, Germany and Poland leading the field.

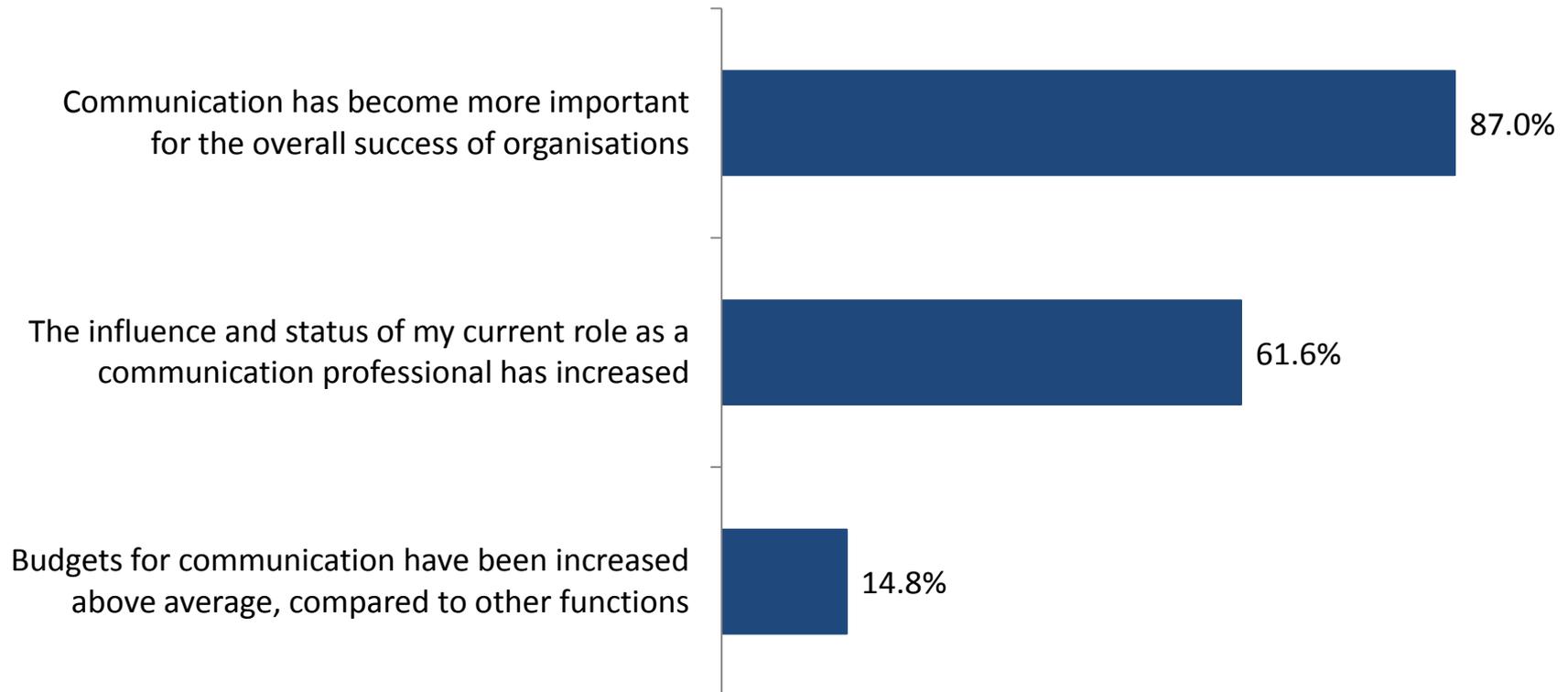
However, the rising importance of communication does not go along with an increased influence and status of the communication function in organisations. This cognitive dimension of institutionalisation (Sandhu, 2009) is underdeveloped in most countries, just like any kind of economic underpinning which would result in rising resources. Despite the rise in importance identified by 87 per cent of the respondents, only 61.6 per cent say that the influence and status of their current role as a communication professional has increased. And only a small minority of 14.8 per cent report that their budgets have been increased above average compared to other functions in the organisation. Differences across Europe are quite strong for both issues. Influence and status have developed more positively in Norway, Denmark and Germany, while Croatia, Slovenia and the Czech Republic are lagging behind. In terms of resources, one third of the professionals in Norway and Denmark report rising budgets, which is at least 10 per cent more than in any other European country.

In the long run communication budgets and resources are going down in many European organisations, compared to other functions of the organisation. 41.1 per cent of the communication professionals say that their budgets are reduced above the average, going up from 37.2 per cent in 2010. For 44.1 per cent the budget has stayed the same, in 2010 this was 40.8 per cent. The development of communication budgets differs significantly in various kinds of organisations, with non-profit organisations on the front.

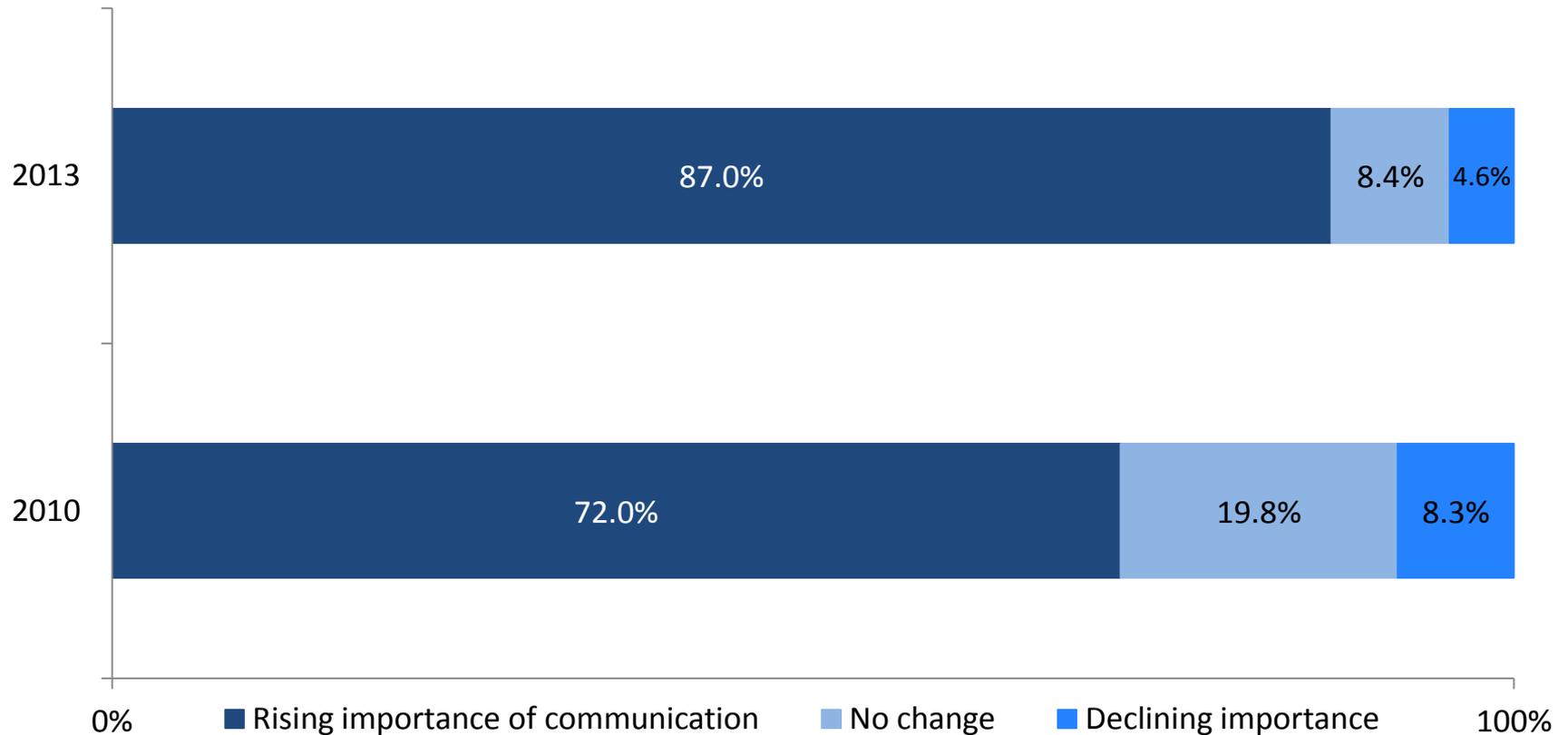
This disillusioning result provokes the question whether communication professionals in Europe fear the future or whether they are still optimistic about the development of their job life. According to the ECM 2013 data, the majority (58.5 per cent) is optimistic when thinking of their career. The support for this positive view is less strong in private companies, while worries are mostly reported by people working in agencies, governmental organisations and private companies. The positive self-perception is also higher in some Western and Northern European countries. Agreements of more than 70 per cent have been recorded in Norway, Sweden, and Switzerland.

Career development and influence in the organisation is positively related to the professional roles enacted by communication professionals. Those responsible for communication strategy and coordination of communication and those who are focused on consultancy, advising and coaching are significantly more optimistic about the future than their peers who take other roles. This complements insights from last year's survey. According to the ECM 2012, aligning communication to organisational goals and coaching are positively correlated to the advisory and executive influence of the communication function at large (Zerfass et al., 2012: 48).

Impact of the turbulent economic and political situation in Europe on strategic communication

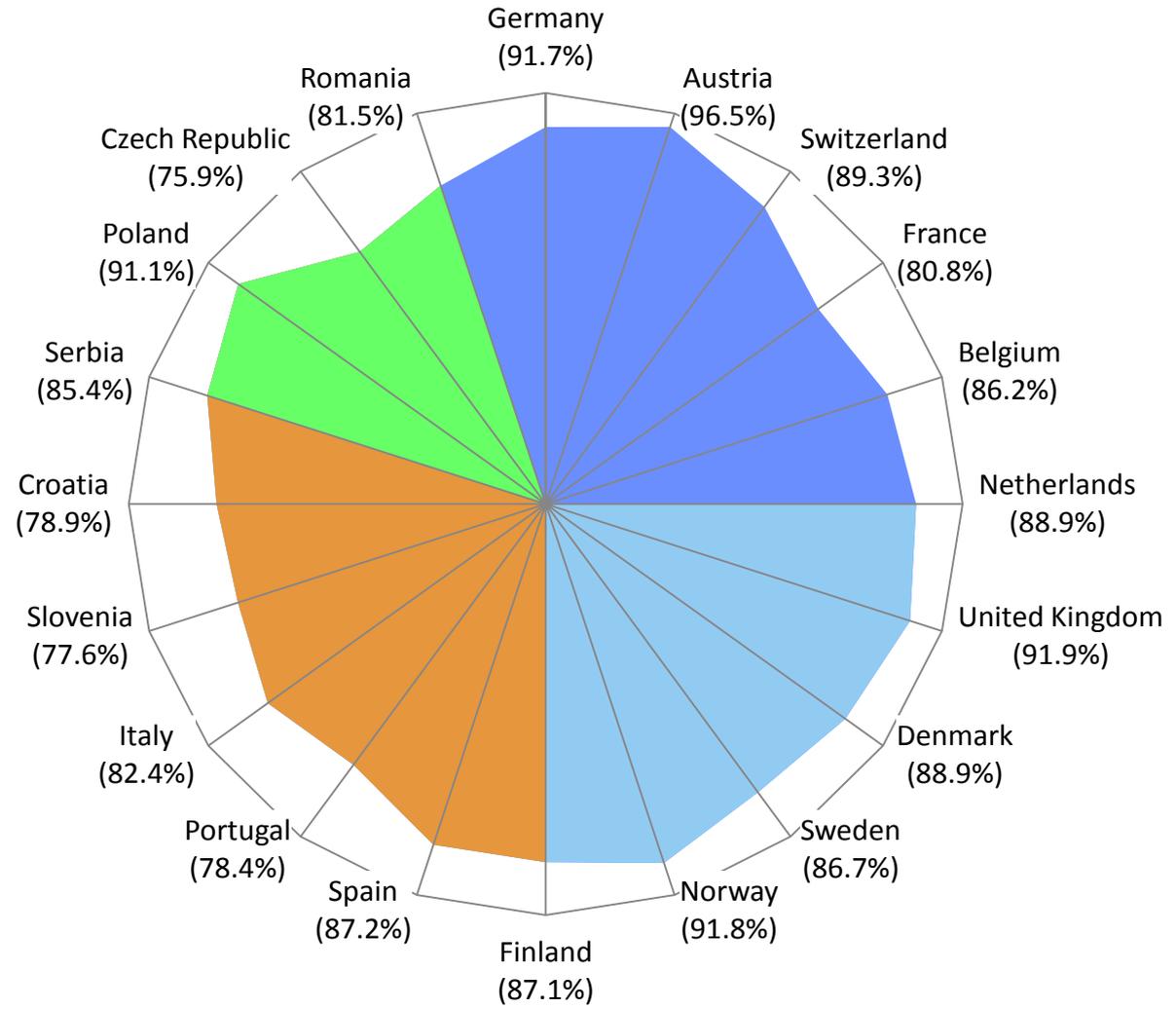


Communication has become more important for European organisations during the current downturn, when compared to the 2009/2010 economic crisis



Rising importance of strategic communication in different countries and regions

„Communication has become more important for the overall success of organisations.“

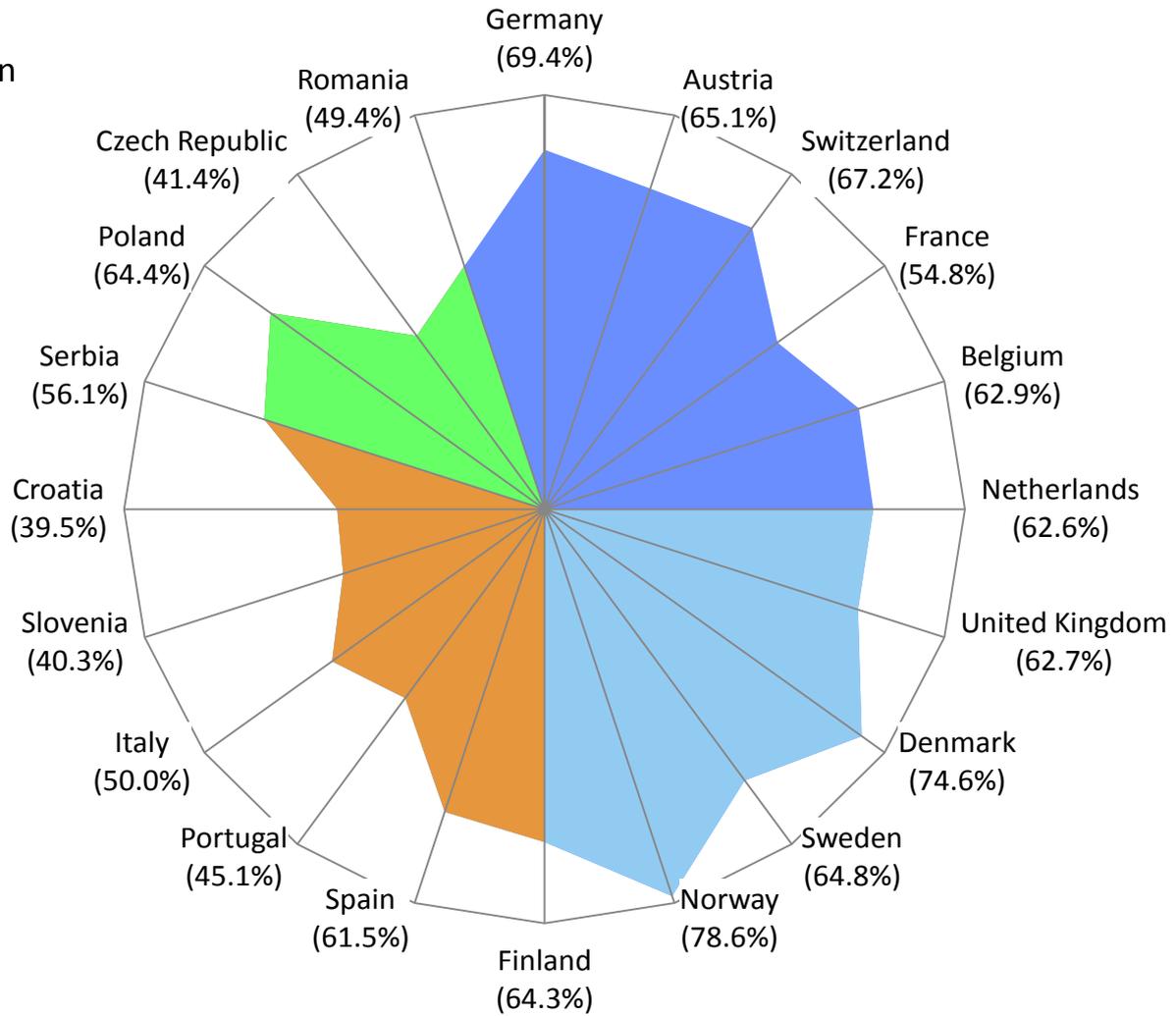


- Western Europe
- Northern Europe
- Southern Europe
- Eastern Europe

Increased status of the communication function

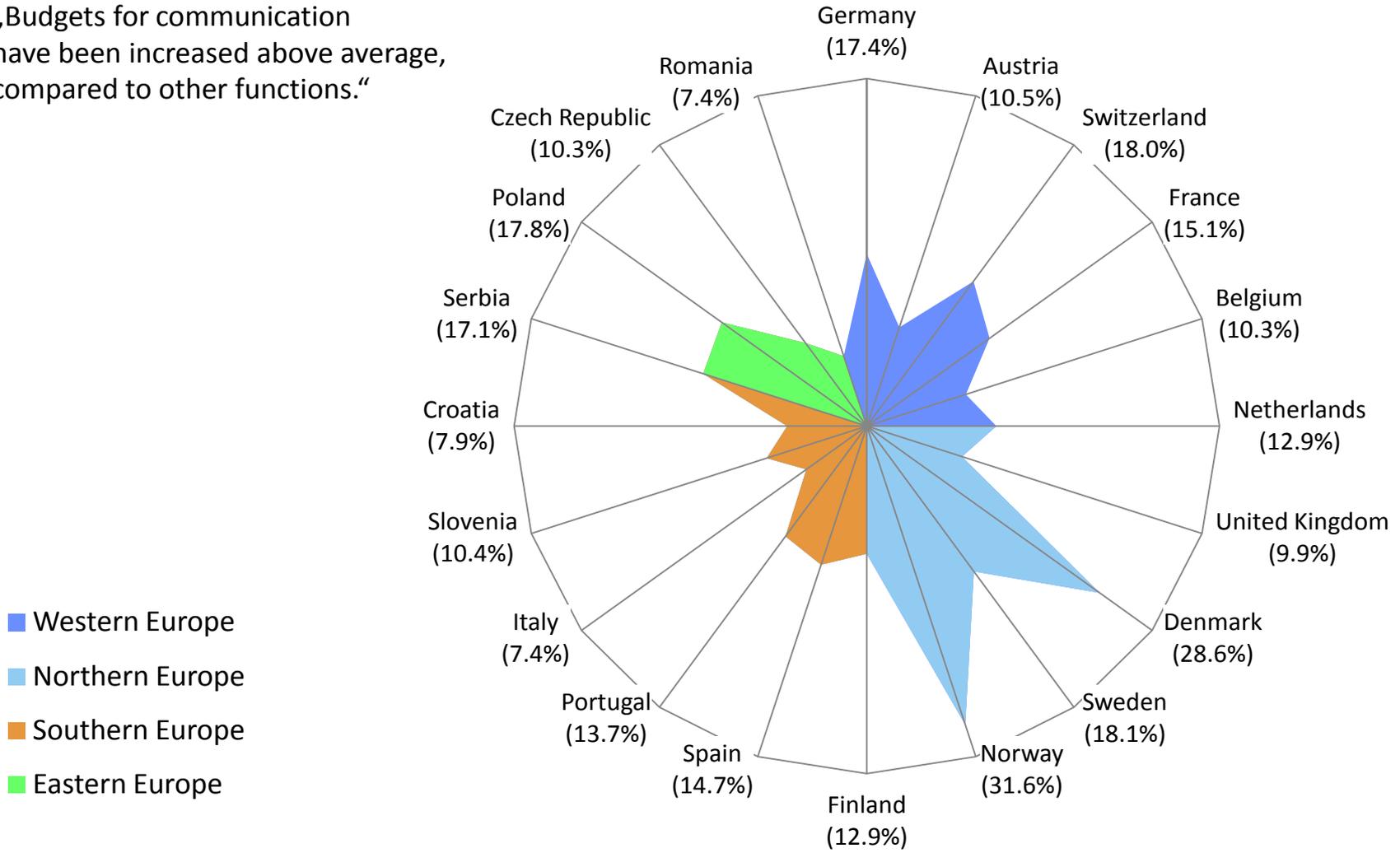
„The influence and status of my current role as a communication professional has increased.“

- Western Europe
- Northern Europe
- Southern Europe
- Eastern Europe

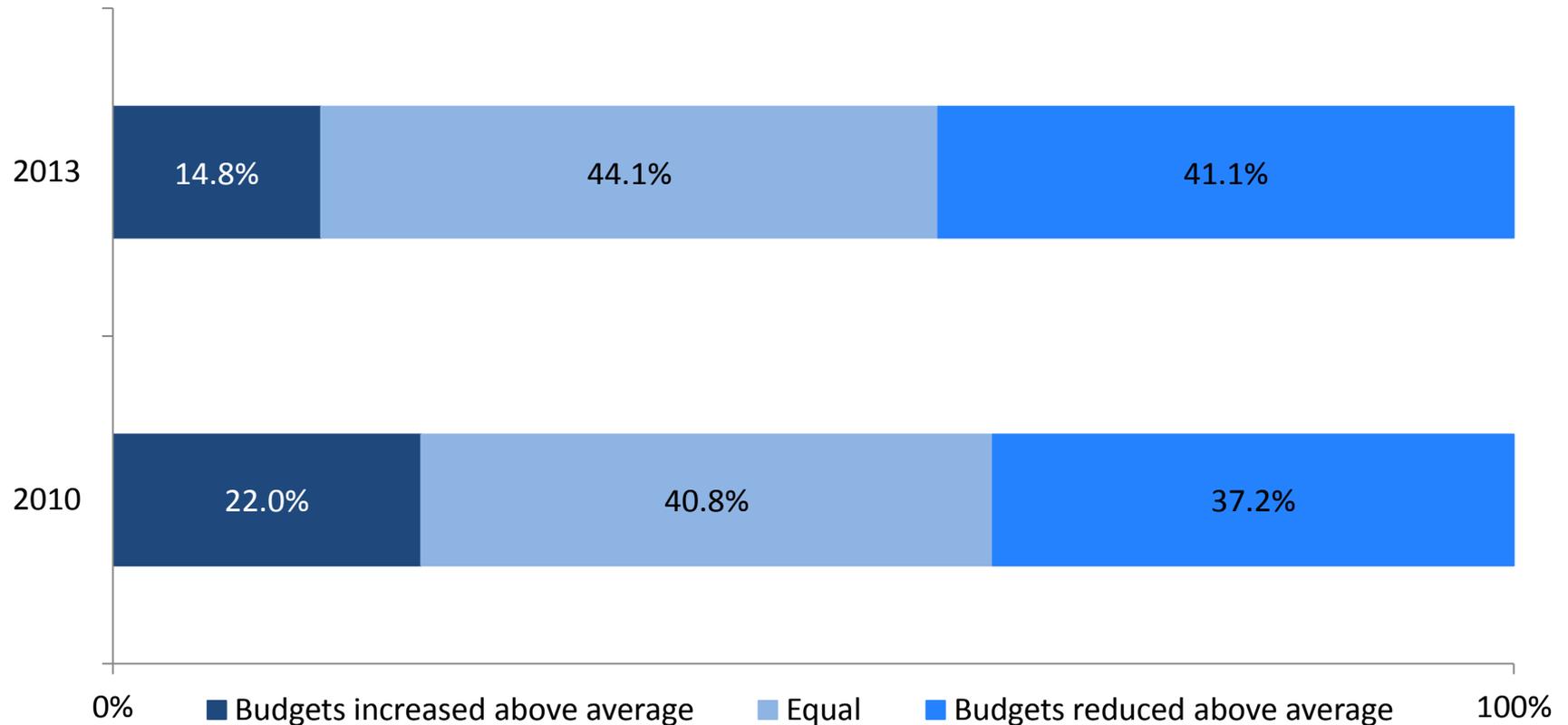


Positive development of communication budgets

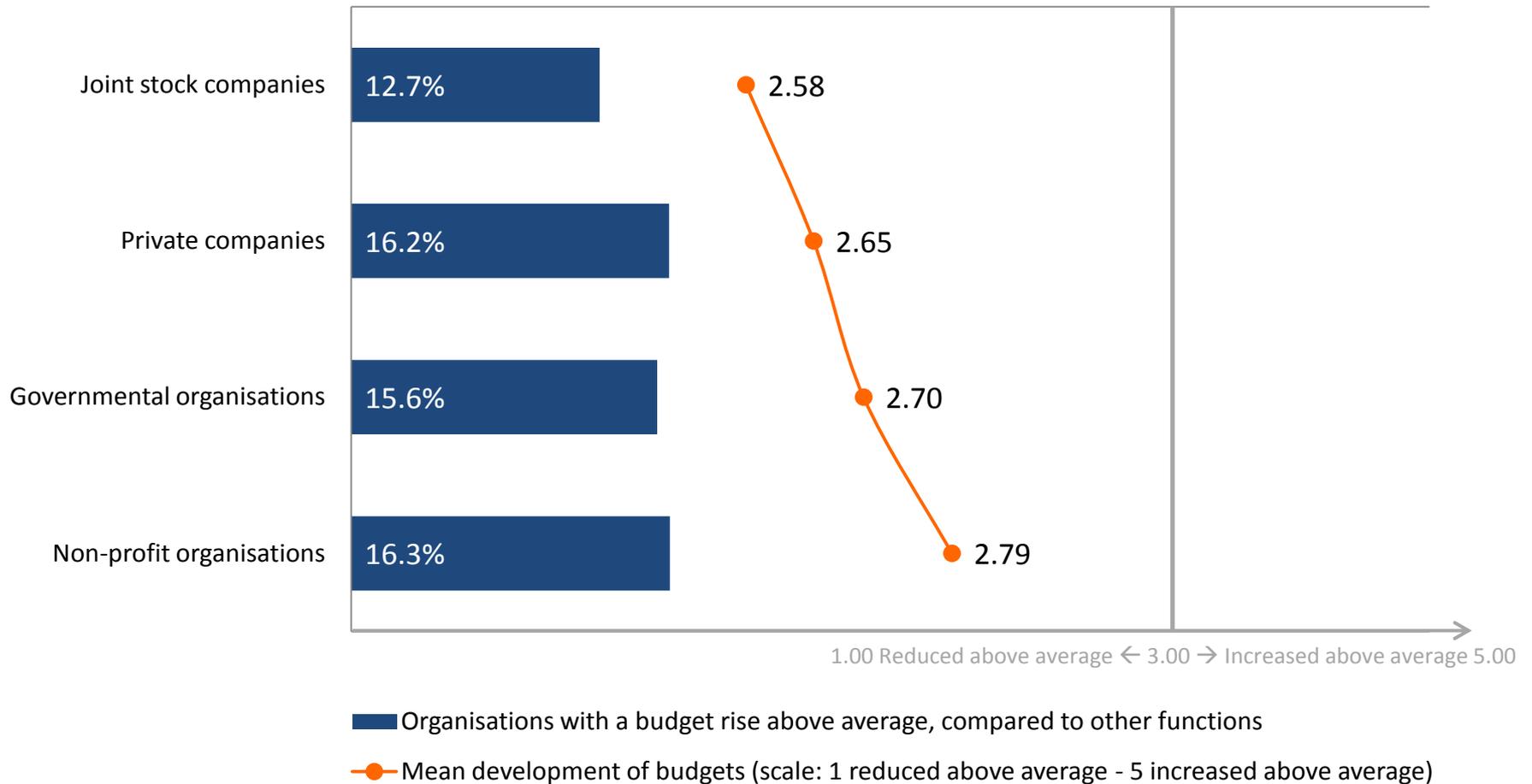
„Budgets for communication have been increased above average, compared to other functions.“



In the long run, communication budgets and resources are going down in many European organisations, compared to other functions



Development of communication budgets within different types of organisations: Non-profits are doing better than others



Career perspectives for communication professionals in Europe

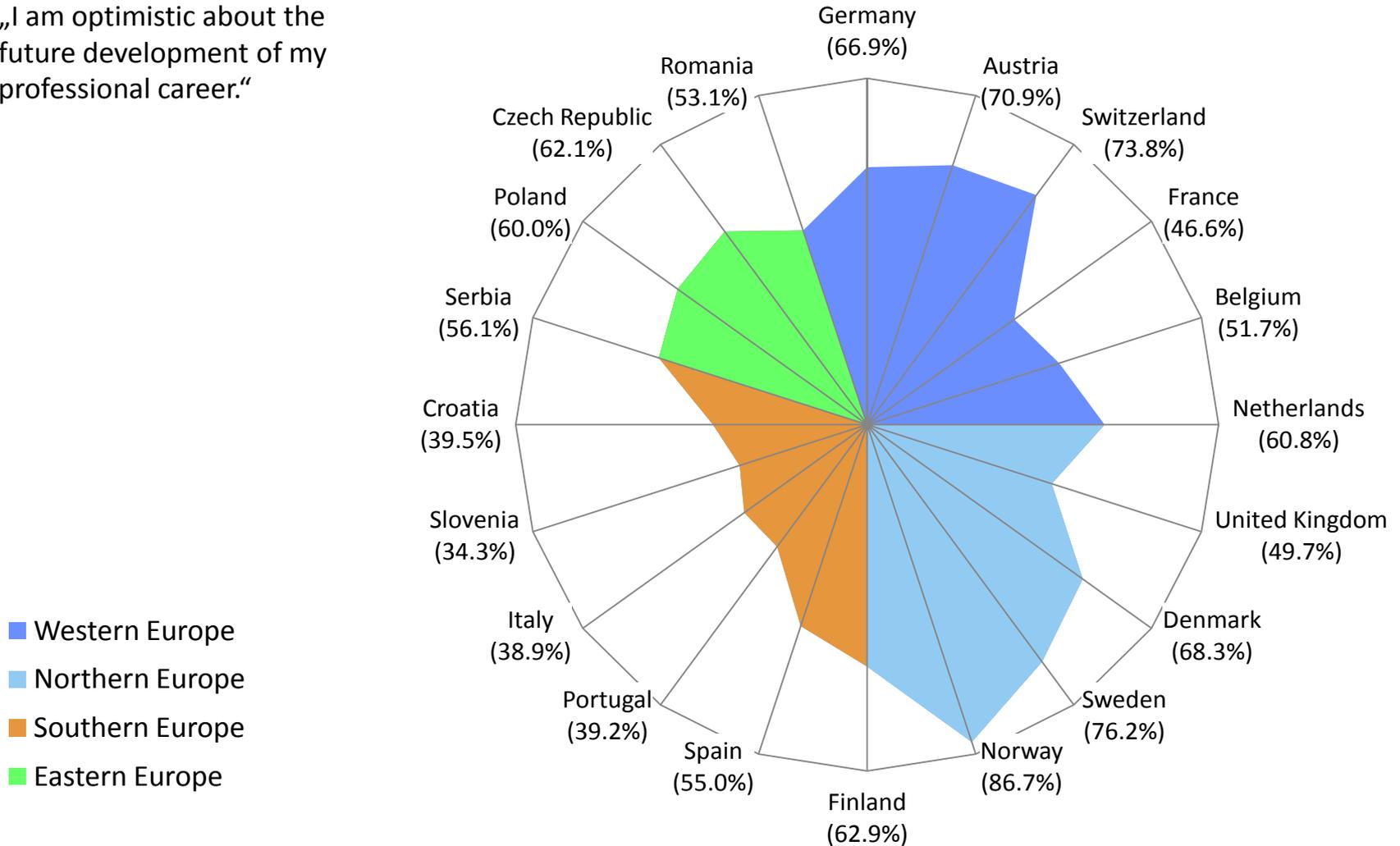
58.5%

are optimistic
about the future development
of their professional career

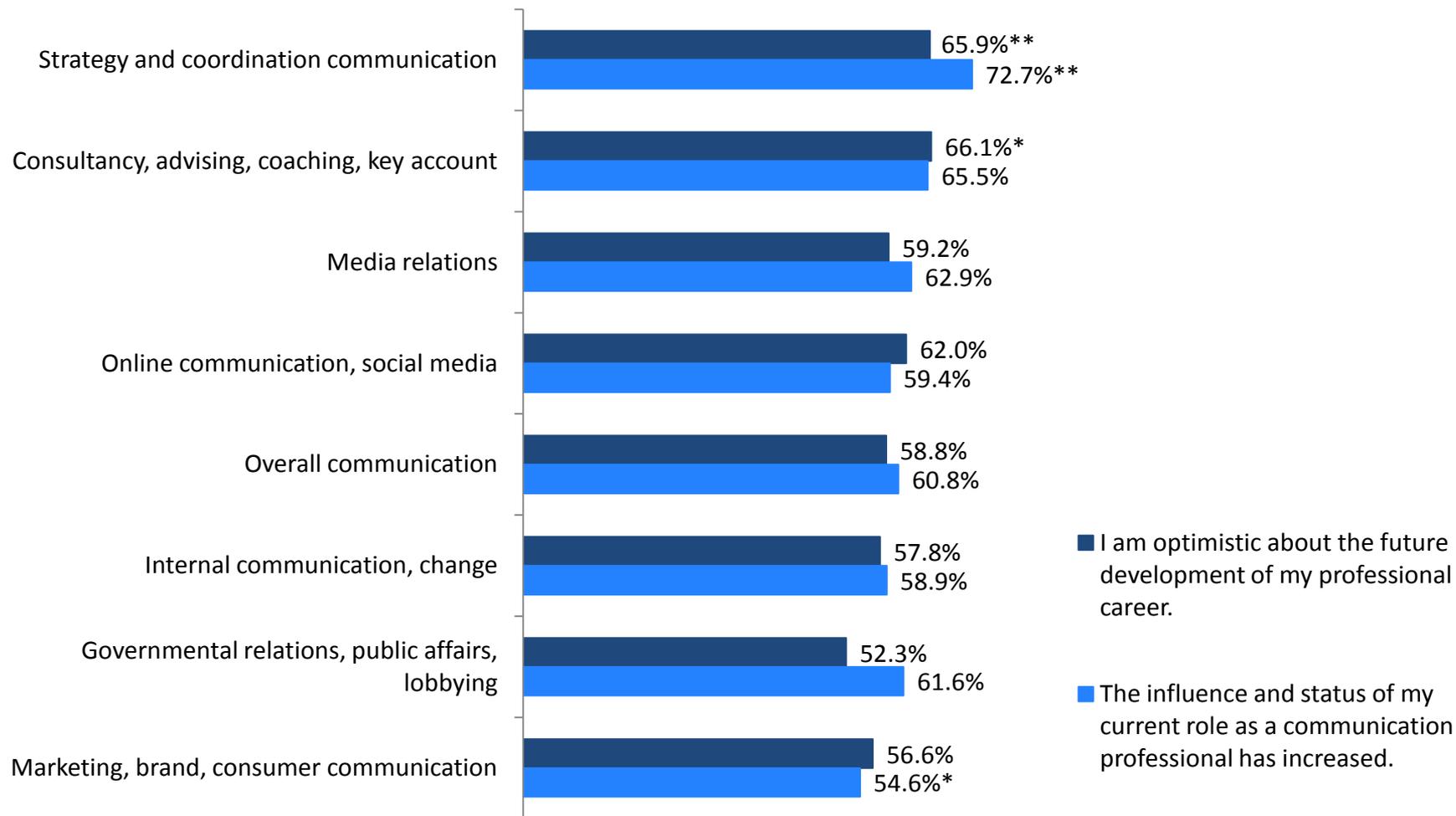
	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations	Consultancies and agencies
Optimistic	59.4%	56.8%	59.7%	59.8%	59.3%
Worried	18.8%	20.3%	21.3%	19.3%	22.0%

Positive self-perceptions about the future of communication careers in different countries

„I am optimistic about the future development of my professional career.“



Career development and influence related to professional roles: Strategists and coaching advisors are most positive and take the lead





Salaries

Chapter overview

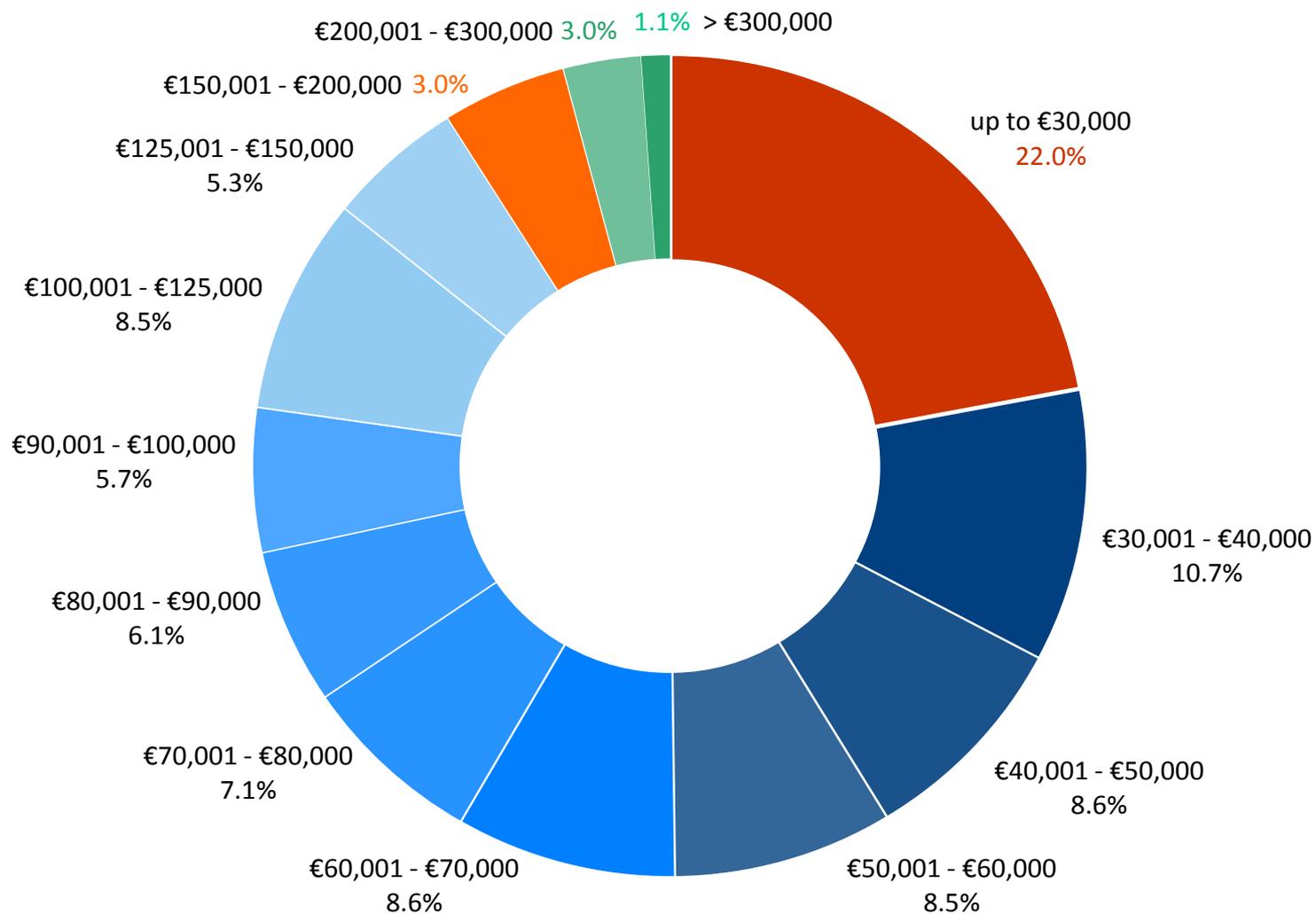
One of the most reviewed and discussed areas of the European Communication Monitor data each year is the findings from the demographic questions relating to gender, pay and position. But it is important to notice that changes between years are the result of differences in the economic landscape across Europe which influence the job market as well as differences in the composition of respondents in the annual samples. In 2013, less than 9 per cent of the communication professionals surveyed earn more than €150,000 base salary per year and only 1.1 per cent earn more than €300,000 annually. At the other end of the scale nearly a quarter (22 per cent) earn less than €30,000 per year, a much higher figure than was reported in previous years. For example, only 9.2 per cent reported earning this rate of pay per year in the ECM 2009 (Zerfass et al., 2009: 81). The 2013 figure is significantly influenced by respondents from Eastern Europe with well over half of respondents (56.9 per cent) from this region reporting earnings less than €30,000. Southern Europe also has a higher number in this pay category at 40.3 per cent contrasting with Northern and Western Europe with 10.5 and 5.9 per cent respectively.

For heads of communication and agency CEOs the percentage of top earners also shows regional differences. Respondents from Northern and Western Europe report significant numbers earning more than €100,000 annually. In countries such as Switzerland, Norway, Germany, Belgium and Italy, every second head of communication and agency CEOs reports annual salaries above the €100,000 mark. This contrasts with some Southern and Eastern European countries such as Serbia, Slovenia, Czech Republic and Romania where less than 10 per cent of those in the top positions earn over €100,000. Once again, the survey underlines that communication management in Europe has a strong identity, shared goals and values, but the profession also reflects the different levels of development in economic terms.

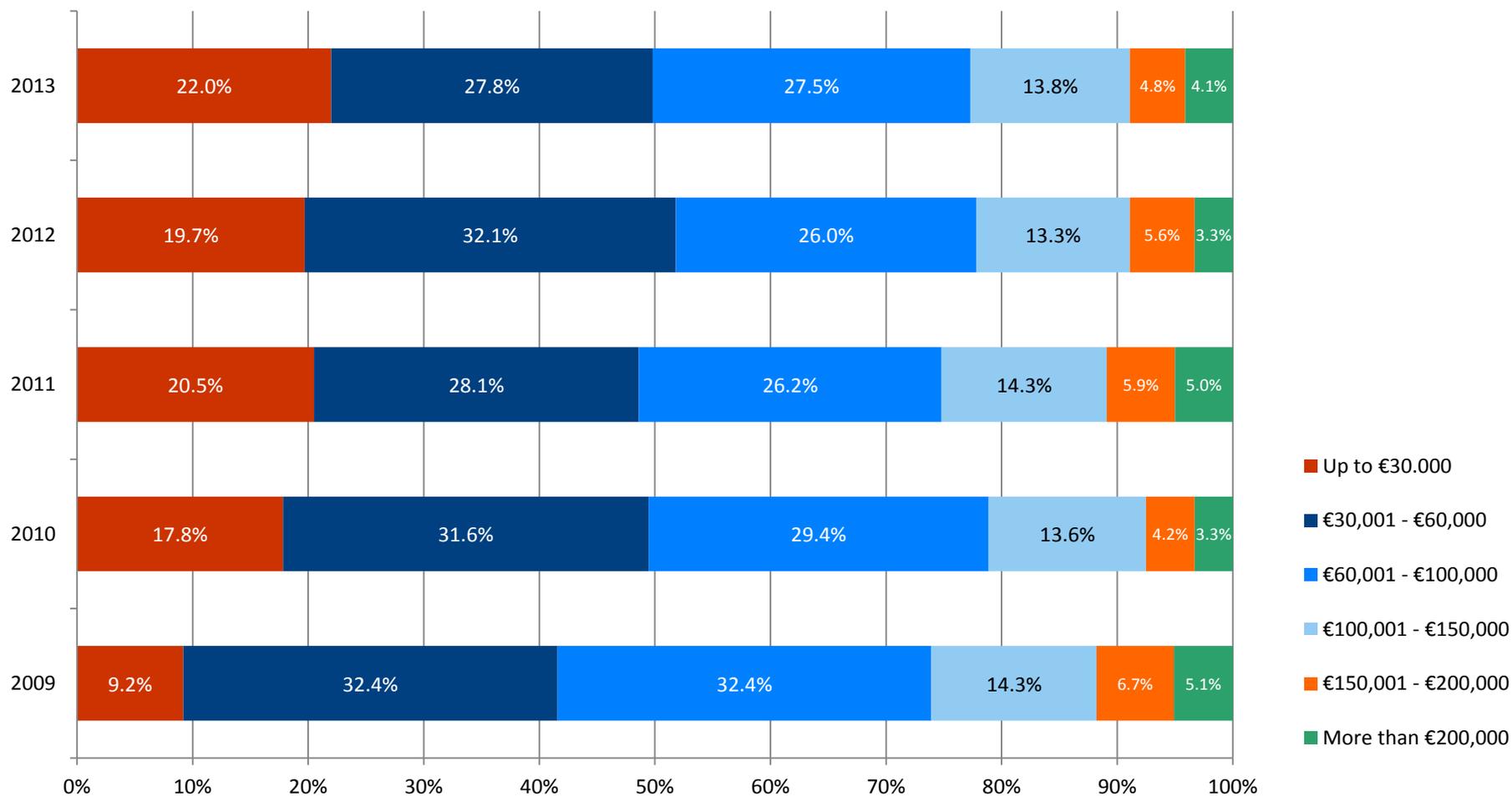
As debates continue in the communications sector about the role of professional practitioner groups and member organisations it is interesting to note the coherence of membership status and annual salary. The ECM 2013 looked at membership within the European Association of Communication Directors (EACD) and its impact on annual salaries compared with other communication professionals. At the lower end it is significant to see that a quarter (24.6 per cent) of non-members of the EACD earn less than €30,000 whereas only 6.3 per cent of members command salaries in this lowest band. In fact membership of the EACD correlates with consistently higher wage performance in all of the salary bands recorded. For example nearly half of the respondents (47.6 per cent) who are EACD members earn more the €100,000 against 18.8 per cent of other communication professionals in Europe.

This broad review of salaries in an empirical study across 43 countries can not reflect the more subtle nuances of the job market in various regions and recognise the more specific demands for much sought-after specialists like digital communication experts or top-management coaches. But the overall trend resembles the slow progress made in establishing status, influence, and budgets of the communication function. The findings suggest communication professionals were often not able to profit from the increasing importance of strategic communication by leveraging their personal income.

Basic annual salary of communication practitioners in Europe 2013

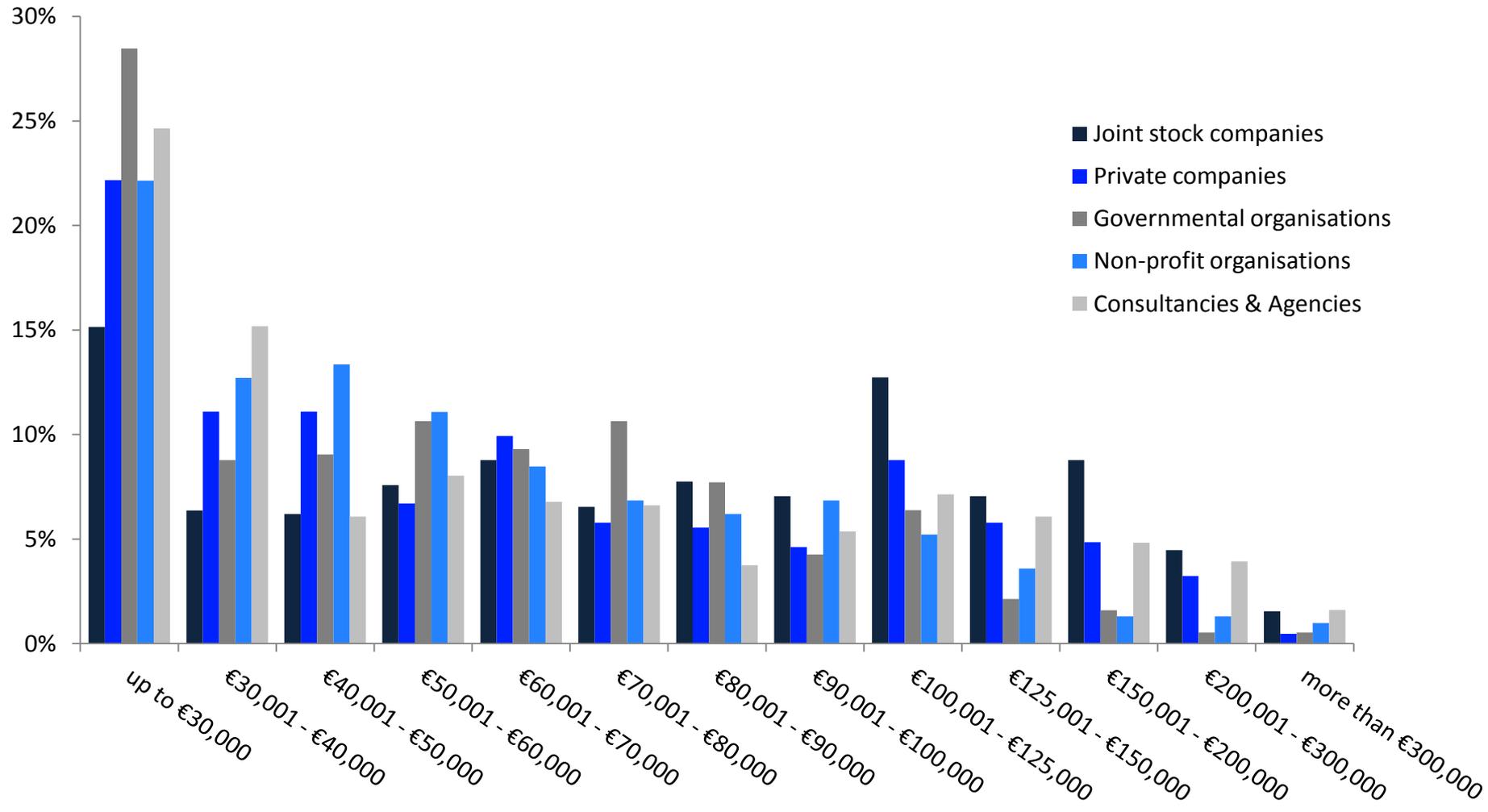


Development of annual salaries from 2009 until 2013

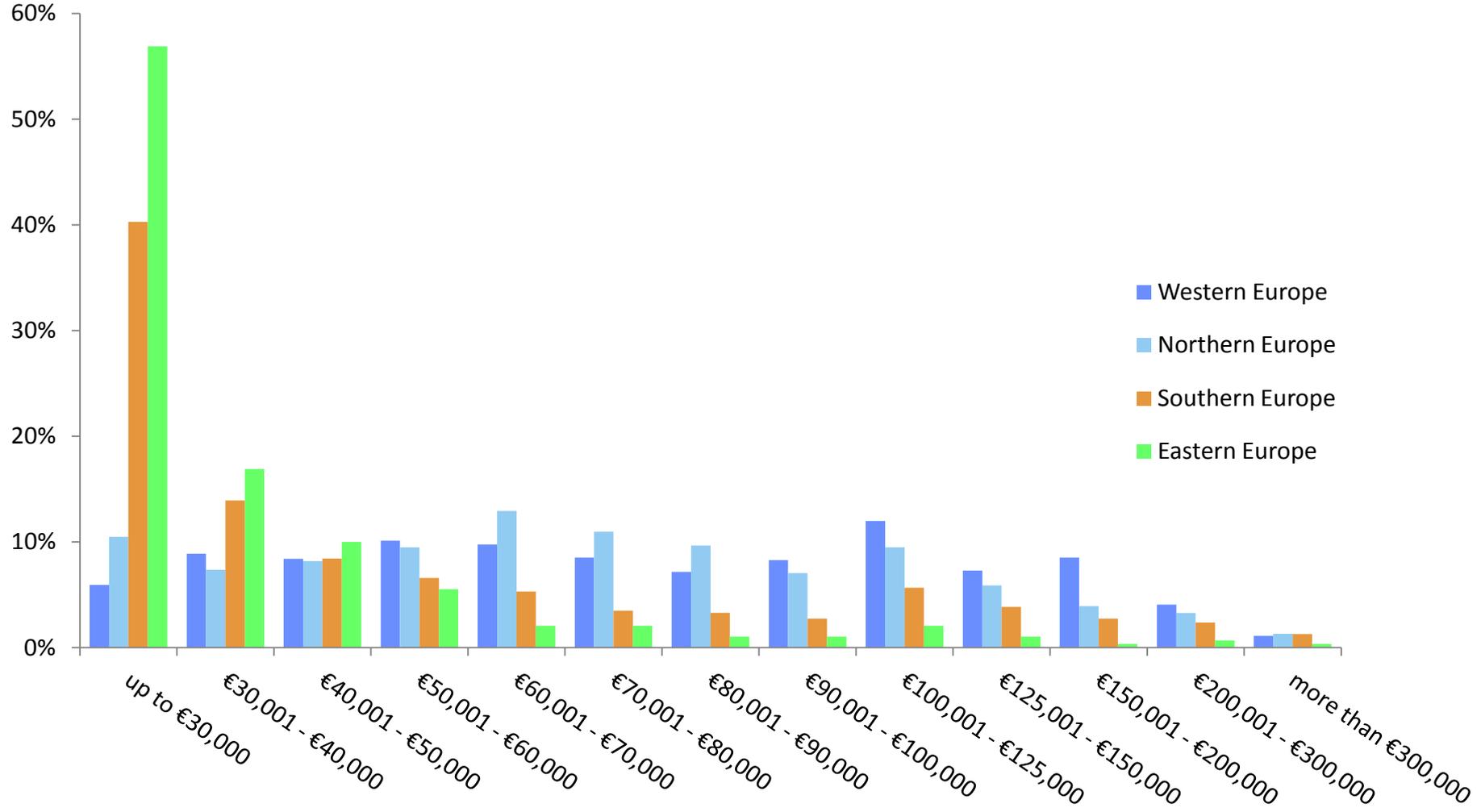


www.communicationmonitor.eu / Zerfass et al. 2013 / n = 2,257 PR professionals. Q 39. Zerfass et al. 2012 / n = 1,811 PR professionals. Q 38. Zerfass et al. 2011 / n = 1,814. Q 20. Zerfass et al. 2010 / n = 1,688. Q 19. Zerfass et al. 2009 / n = 1,768. Q 17: In which of the following bands does your basic annual salary fall? Results might be influenced by varying numbers and regional/hierarchical background of respondents in annual surveys.

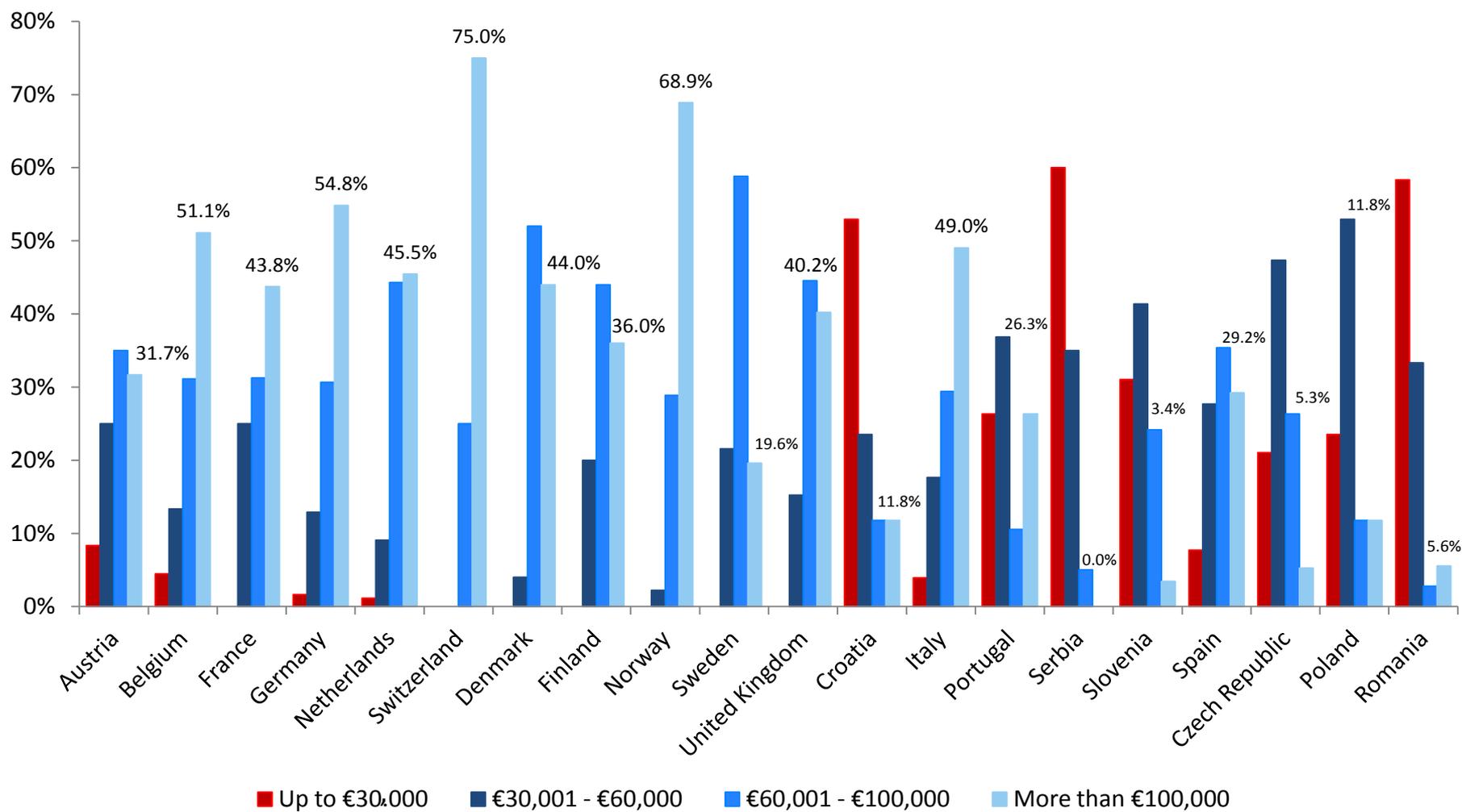
Annual salaries in different types of organisations



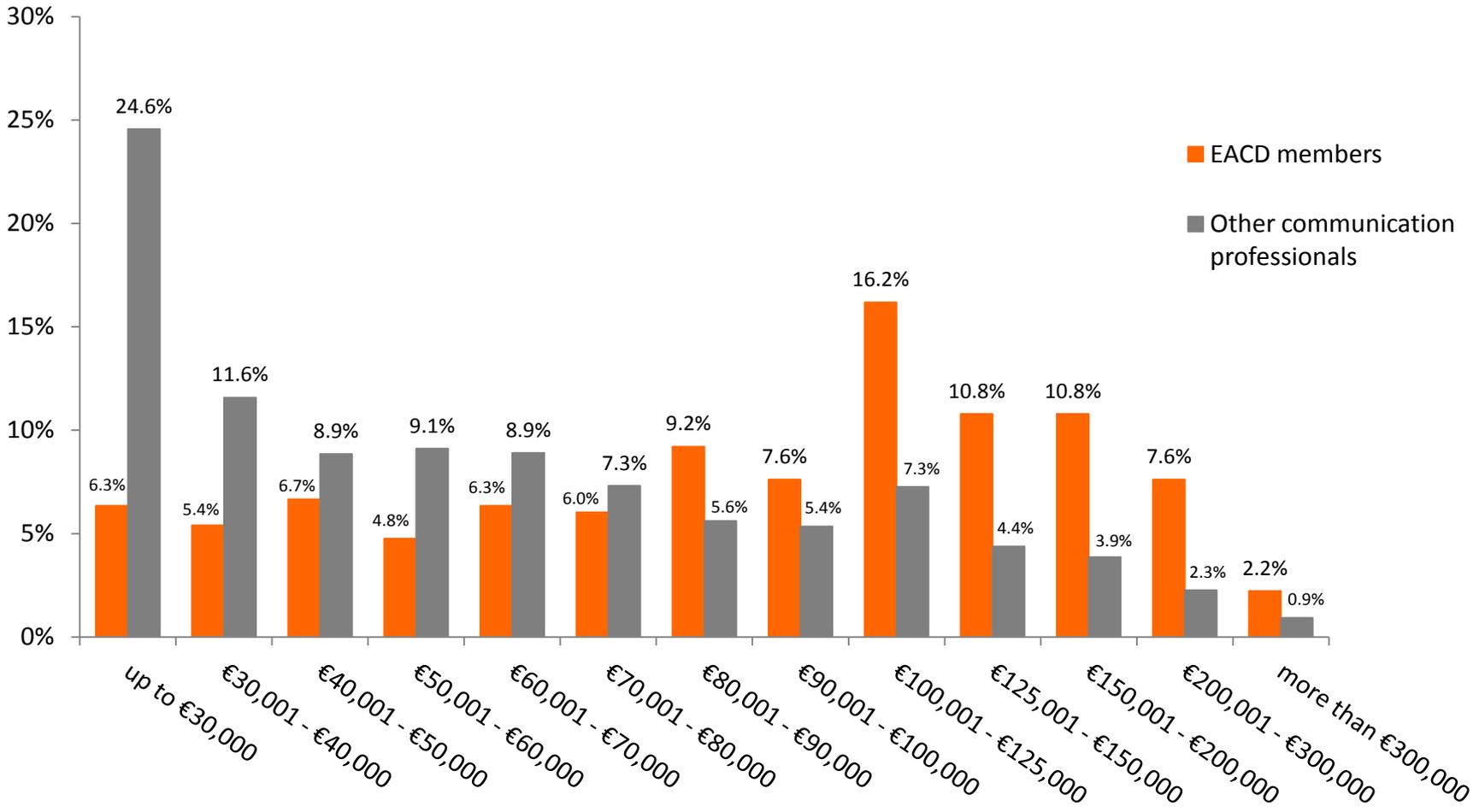
Annual salaries in different European regions



Annual salaries of heads of communication and agency CEOs in selected countries



EACD members enjoy a comparatively high annual salary





Impact of professional associations

Chapter overview

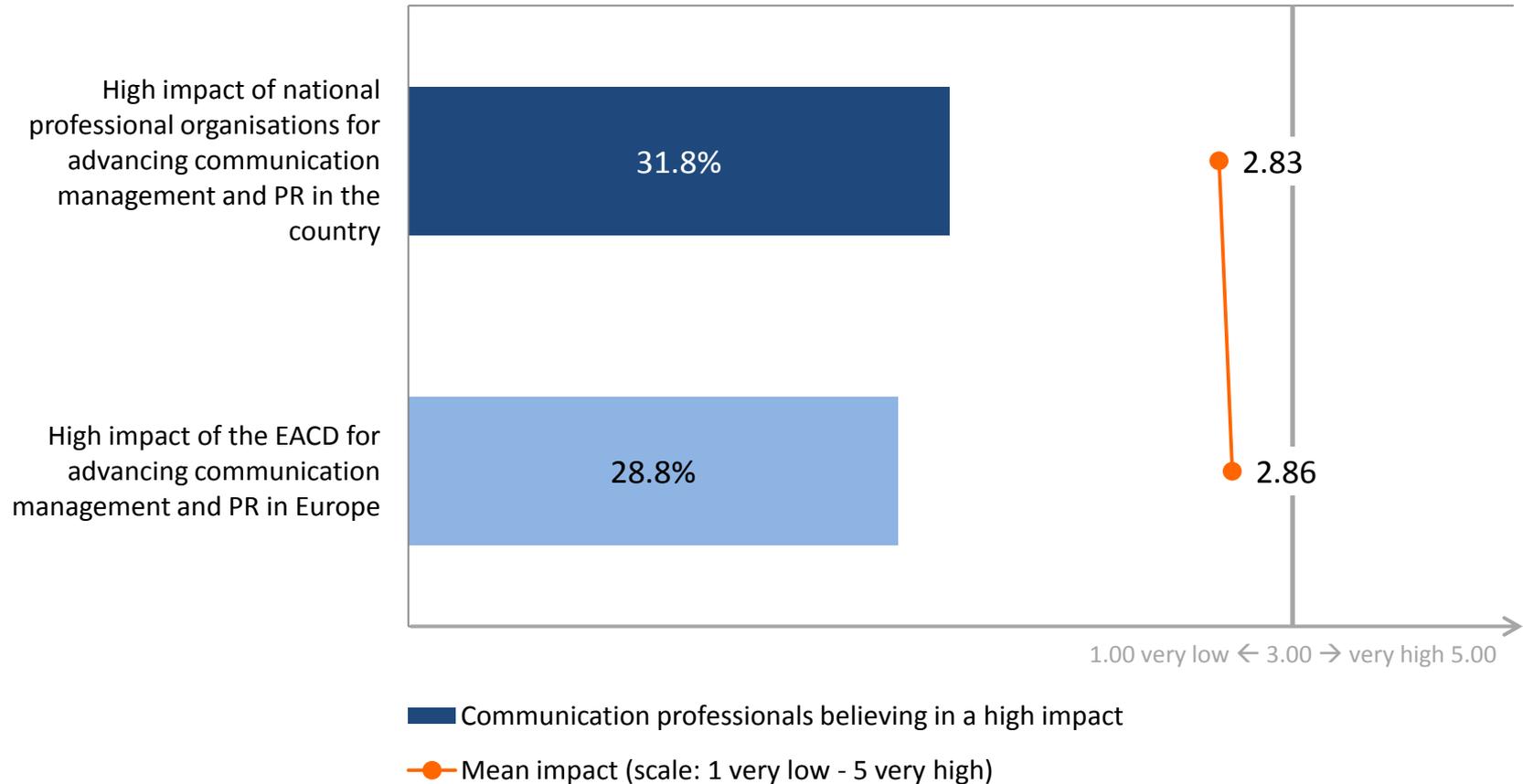
Professional organisations can help communication professionals to develop their professional identity further and to strengthen the professionalisation of public relations and communication management (Van Ruler & Verčič, 2005; Cornelissen, 2011; Molleda et al., 2010, 2012). Strong national and international associations are considered to be important for this development. The perception of the impact of professional associations for advancing strategic communication is relatively modest. Nearly every third respondent (28.8 per cent) states that the European Association of Communication Directors (EACD) has a high impact on the development of the profession in Europe. 31.8 per cent think that the national professional organisation in the respective country is relevant. A relatively high value in national professional organisations is found in countries like Spain, Croatia, Sweden, Norway, Finland and Austria, where four out of ten professionals report a high or very high impact. A relatively high impact of the EACD is found in Spain, Croatia and Portugal.

Communication professionals with an international outreach and EACD members value this association significantly higher than professionals who do not have such an international dimension to their role or who are not affiliated. From the respondents stating that communicating internationally is important for their organisation, 32.5 per cent think that the impact of the EACD is high, while 46.5 per cent of the members support this view. The figures show that the EACD is more attractive for communication professionals working in international environments, and that any association has to improve its visibility and explain its role in institutionalising strategic communication to those working in the field.

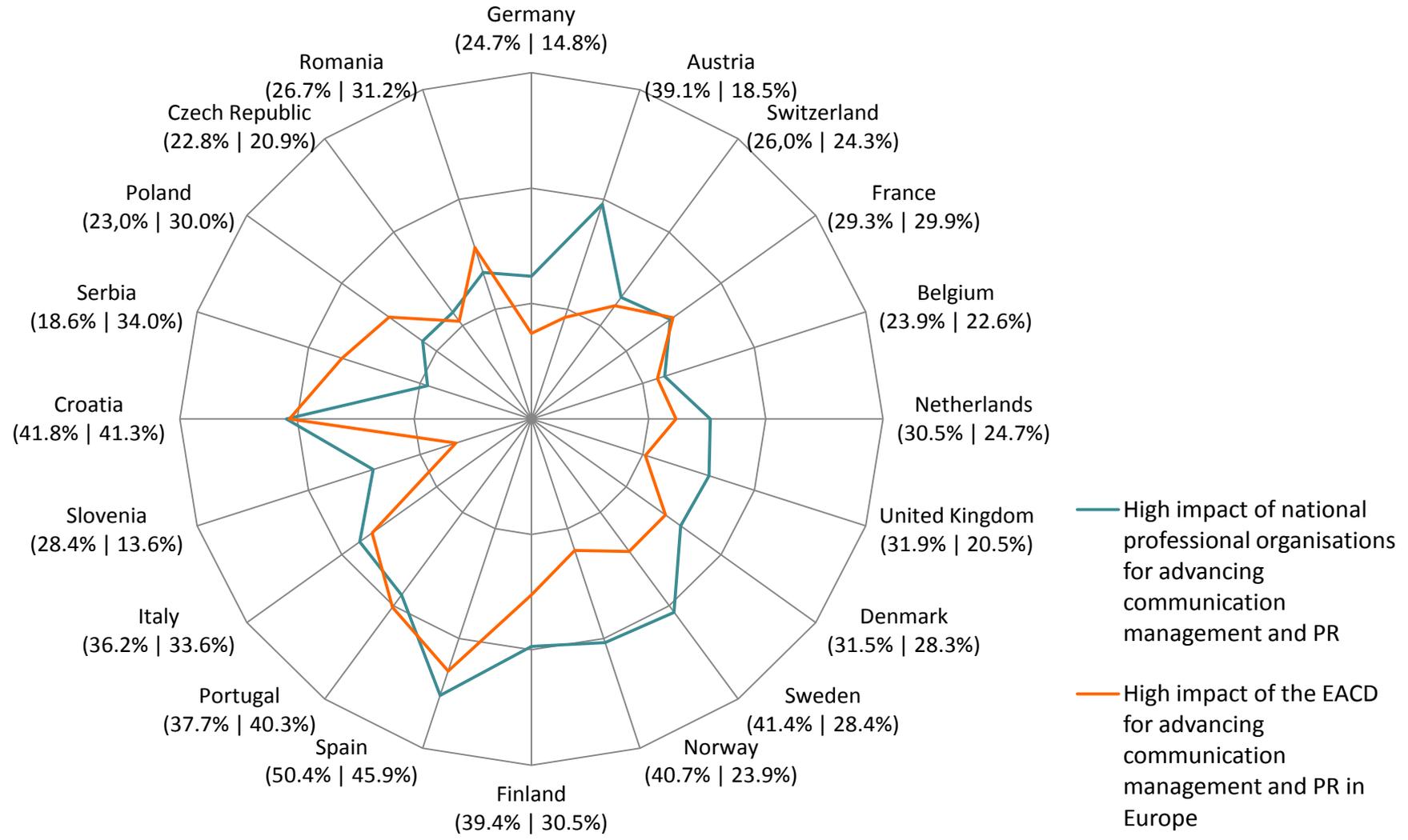
Respondents were asked what they think are important functions of European associations like the EACD. The most important service for members and the profession at large is identifying trends in the field. This dimension, which is supported by studies like the ECM series of surveys, scores top with a mean value (M) of 4.08 on a 5-point scale ranging from not important (1) to very important (5). Other important goals are enhancing the reputation of the practical field (M = 3.96), knowledge transfer via magazines and websites for example (M = 3.88), and information sharing at events and conferences (M = 3.84). International networking opportunities focused on specific topics are valued more important than regional groups. Supporting academic research is rated quite important (M = 3.62), while promoting and honouring best practices with awards is judged the least relevant topic.

Interestingly, the services provided by communication associations are valued differently by professionals on different hierarchical levels in the practice. Practitioners working on a lower level value further education and networking opportunities both internationally and within their home country significantly higher than their superiors. This is true both for the comparison between team members and team leaders and between those team leaders and heads of communication. This result shows that the needs of those working in a young and dynamic profession like strategic communication are quite diverse, and associations might think of offering a differentiated portfolio of services to their membership.

Perceptions of professional associations on the national and European level

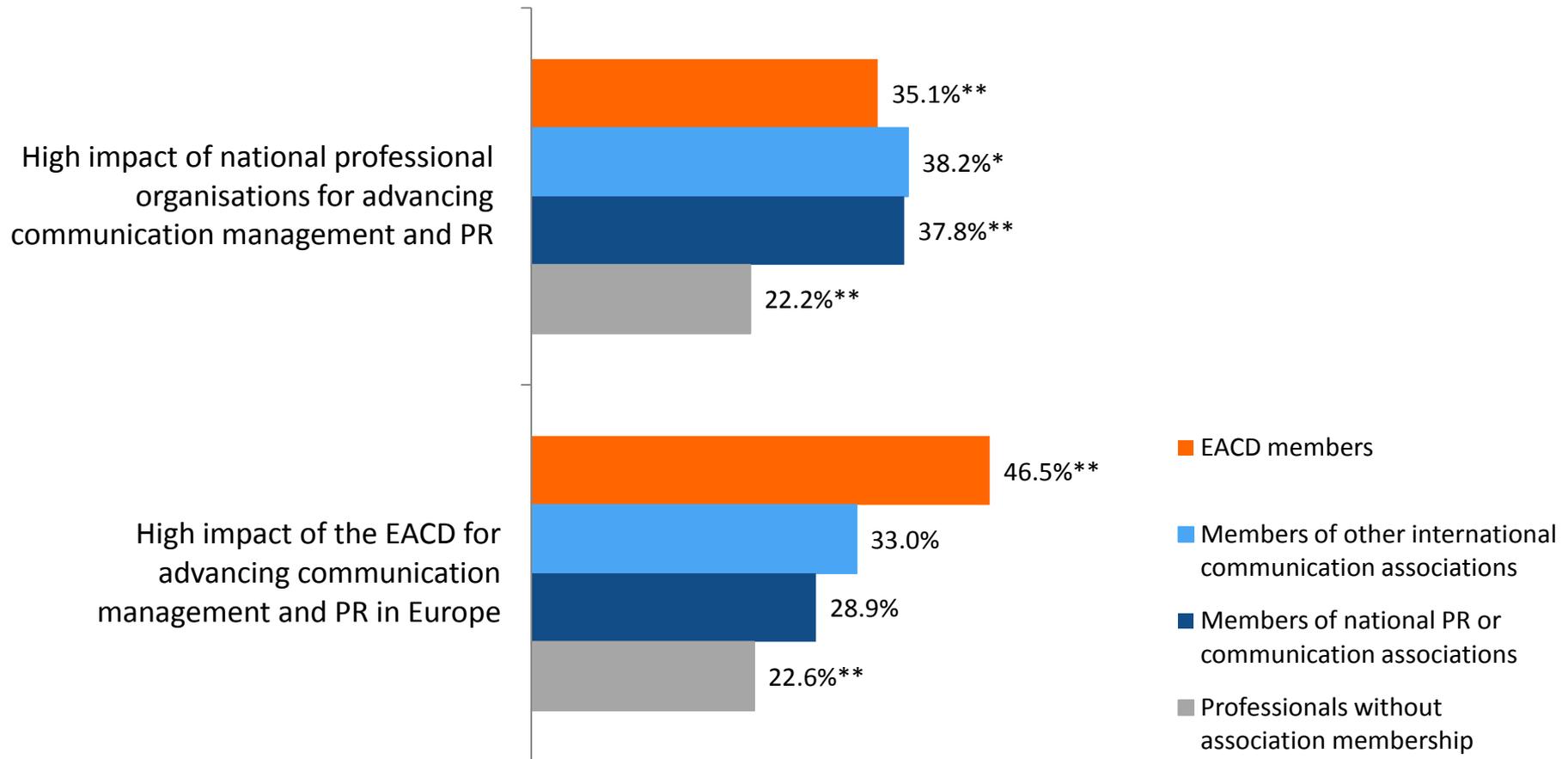


Perceived impact of national associations and the EACD across Europe



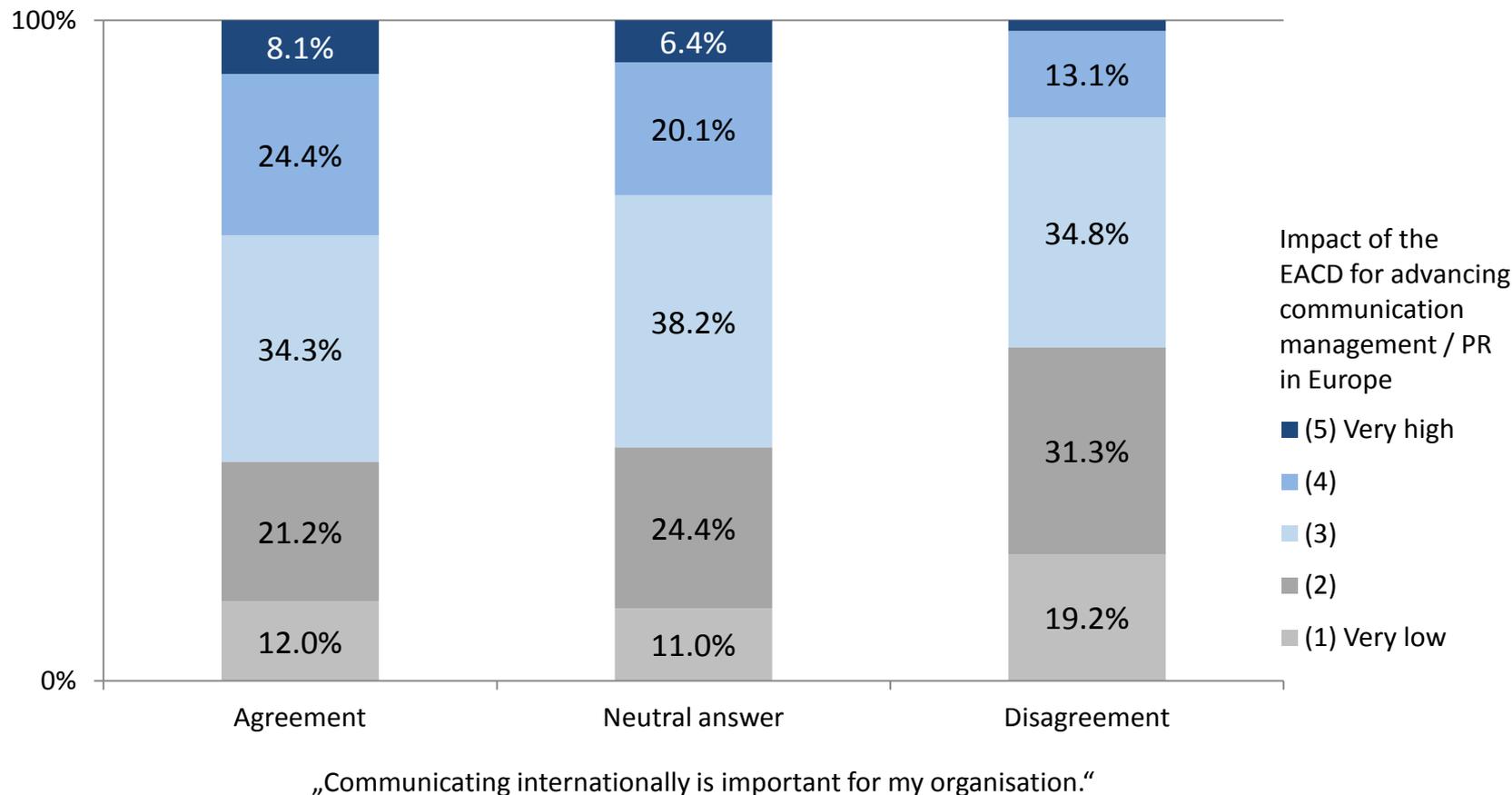
www.communicationmonitor.eu / Zerfass et al. 2013 / n^{min} = 1,938 PR professionals. Q 23: How do you rate the impact of national professional organisations for advancing communication management and PR in your country? How do you rate the impact of the EACD for advancing communication management and PR in Europe? Scale 1 (very low) – 5 (very high). Percentages: High impact based on scale points 4-5.

Perceived impact of professional associations among members and non-members



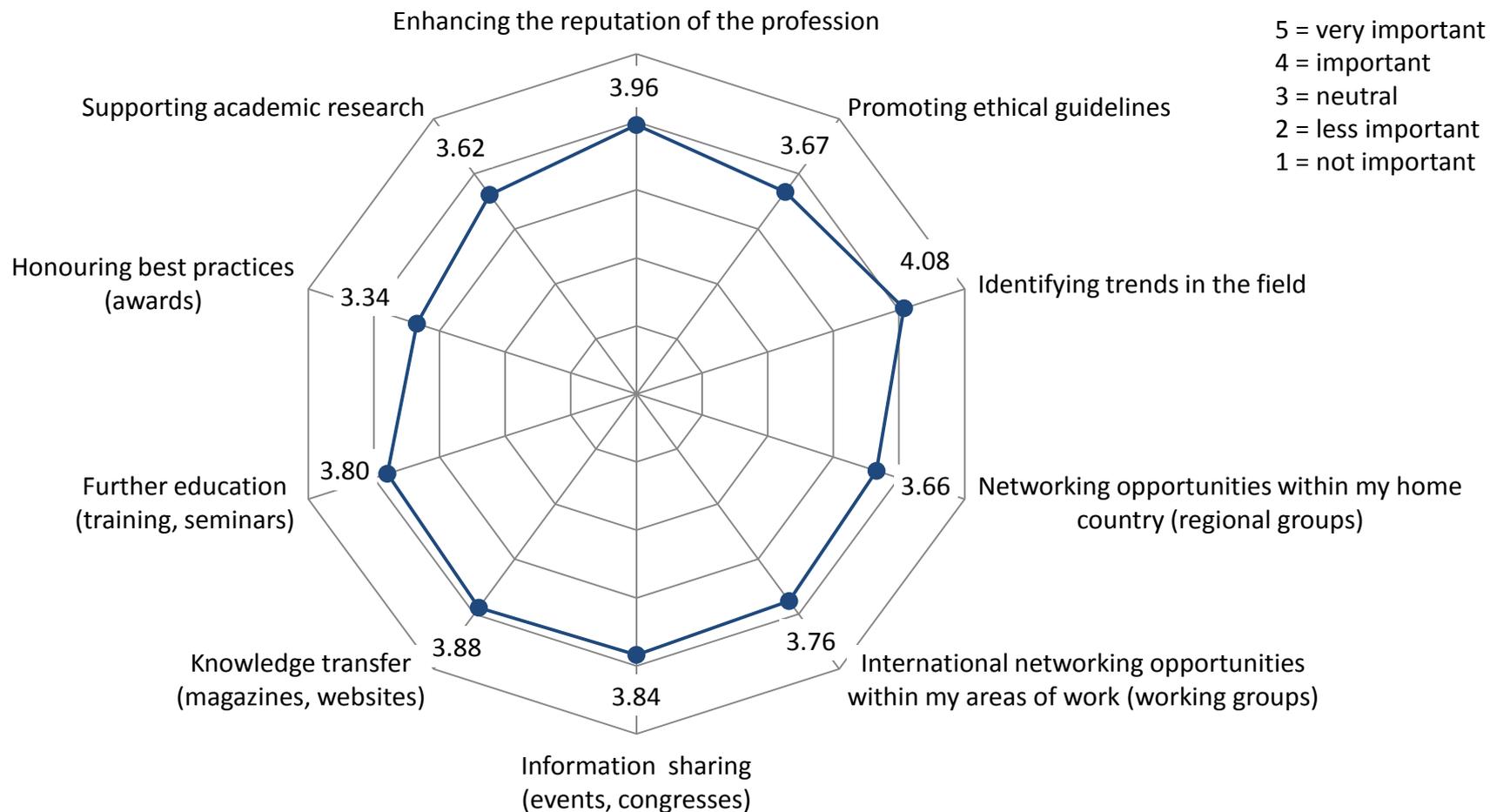
www.communicationmonitor.eu / Zerfass et al. 2013 / n^{min} = 1,938 PR professionals. Q 23: How do you rate the impact of national professional organisations for advancing communication management and PR in your country? How do you rate the impact of the EACD for advancing communication management and PR in Europe? Scale 1 (very low) – 5 (very high). Percentages: High impact based on scale points 4-5. ** Highly significant correlations (chi-square test, p ≤ 0.01). * Significant correlations (chi-square test, p ≤ 0.05).

Communication professionals with an international outreach value the EACD significantly higher than others



www.communicationmonitor.eu / Zerfass et al. 2013 / n^{min} = 1,938 PR professionals. Q 23: How do you rate the impact of the EACD for advancing communication management and PR in Europe? Scale 1 (very low) – 5 (very high). Q 18: Please rate the following statements from the point of view of your organisation: Communicating internationally is important for my organisation. Scale 1 (strongly disagree) – 5 (totally agree). Highly significant correlations for all items (Pearson product-moment correlation, $p \leq 0.01$, $r = 0.144$).

Important functions of European professional organisations like the EACD for developing the profession and serving its members



Services provided by communication associations are valued differently by professionals on different hierarchical levels

<i>Important functions of European associations like the EACD:</i>	Head of communication, agency CEO	Team leader, unit leader	Team member, consultant	<i>Kendall's tau b</i>
Further education**	3.72	3.78	3.92	$\tau = 0.060$
International networking opportunities within my areas of work*	3.72	3.76	3.85	$\tau = 0.039$
Networking opportunities within my home country**	3.57	3.65	3.78	$\tau = 0.058$

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