

# Insights and experiences

Presenting 10 starting-points for discussion in this year's European Communication Monitor

BY RALPH TENCH AND ANSGAR ZERFASS

**R**apid changes in the communication environment challenge organisations around the globe. Many claim that mass media are losing their leading role in shaping public opinion and new approaches like content marketing are propagated. However, there is little evidence that this helps to support organisational goals. Looking further, there is no compelling answer at all to the overarching question of how communication creates value for organisations – instead, various rationales like building reputation, managing relationships, avoiding crises, securing legitimacy, identifying opportunities or supporting sales compete with each other both in theory and practice. These and other questions are explored in this year's edition of the European Communication Monitor. This survey provides a clear view and understanding of the mindset of today's European communications leaders and in this article we look at the standout findings of this year's report.

## Future relevance of mass media

Communicators in Europe predict a tectonic shift from the predominance of mass media to owned media (which used to be called “corporate publishing”) for shaping public opinion. They intend to spend less on advertising, while they see a strong rise in the use of unpaid interactions with mass media and even more for strategic partnerships with the mass media. Nevertheless it would be premature to predict the death of the traditional mass media: nearly three quarters of the respondents use mass media to monitor news and public opinion, and more than two thirds

## ABOUT THE EUROPEAN COMMUNICATION MONITOR 2015

In July this year, the European Public Relations Education and Research Association (EUPRERA) and the European Association of Communication Directors (EACD) published the results of their ninth annual study on the state-of-the-art of communication management and trends within the profession across Europe. The European Communication Monitor 2015 is based on replies from 2,253 communication professionals in 41 European countries. The monitor is the largest annual empirical survey in the field worldwide; it provides country-specific analyses for 20 key markets across the continent. The ECM is supported by partners PRIME Research International, a global leader in strategic communication research, and Communication Director magazine. Authors of the study are five university professors representing leading academic institutions in the field, led by Professor Ansgar Zerfass from the University of Leipzig. A wider board of professors and national research collaborators ensure that the survey reflects the diversity of the field across Europe. A free PDF report with full results as well as a YouTube video with the highlights is available at [www.communicationmonitor.eu](http://www.communicationmonitor.eu)

evaluate media coverage of the organisation, its products and services. Besides these inbound uses of the mass media, communicators still extensively use mass media for outbound reasons: more than seven out of ten respondents spread information about the organisation, its products and services through mass media and more than half use them to influence gatekeepers, the media agenda and stakeholders.

## Integrating communication

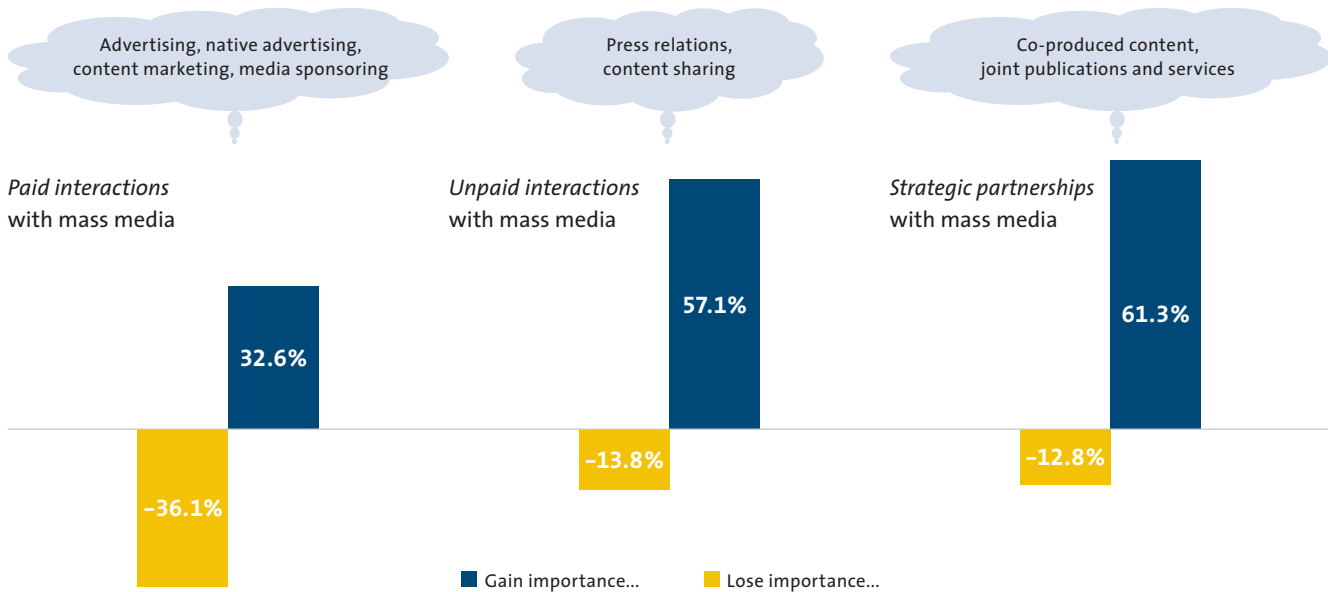
85.6% of respondents believe that there is an overall need to integrate communication activities which affect all functions. The reason why: many believe that all communication functions nowadays use the full range of instruments online/offline, sometimes only under disparate names. But comparison to the 2011 Monitor shows that there is hardly any progress in integrating communication by intra-organisational collaboration: ties between functions have not been strengthened during the last five years.

## Content strategies

Researchers are sometimes slow in addressing new concepts of content strategy, brand journalism, content marketing and native advertising, as if they are only passing hypes. Communicators in Europe, however, perceive these concepts as very important: content strategy, content marketing, brand journalism, and native advertising, with strong gaps when compared to their actual usage. There are significant differences between countries. For example, content marketing has high usage in the United Kingdom and Finland compared to Slovenia and Croatia, who are slow movers in this respect. Major differences were also found for the usage of content strategy as well as brand journalism – the latter practice being very popular in Danish, Dutch and British organisations. Marketing, brand, consumer and online communicators are more in favour of these concepts than media relations and strategy and coordination people. There seems to be a defensive and conservative tendency at work here involving “traditional” public relations functions (e.g. media relations): many seem try to preserve their turf in what is a diminishing territory.

## Strategic issues

“Linking business strategy and communication” continues to be the most important issue for communication management in Europe, leading the list of top issues for the third year in a row. This finding reiterates that the profession is continuing to strive



www.communicationmonitor.eu / Zeffass et al. 2015 / n min = 2,232 PR professionals. Q1: The mass media industry and journalism face dramatic challenges, which might change the way organisations interact with them. Please rate the relative importance of those activities for strategic communication within the next three years: Scale 1 (Lose a lot of importance) – 5 (Gain a lot of importance).

**Table 1: Collaboration between communicators and mass media: Strategic partnerships and unpaid interactions will be more important**

for a strategic position at the decision-making table. Looking forward for the next three years, European communicators regard “Coping with the digital evolution and the social web” as the second most important challenge. Meanwhile “Building and maintaining trust” is in the close third position. There are, however, very interesting differences between countries: “Linking business strategy and communication” is the hottest issue in Spain, Finland and Ukraine. “Coping with the digital evolution and the social web” is the top issue in Ireland, Belgium, Romania, Turkey and Croatia; “Building and maintaining trust” is the top issue in Slovenia and Sweden; while in France the top issue is “Matching the needs to address more audiences and channels with limited resources”.

## Value contribution

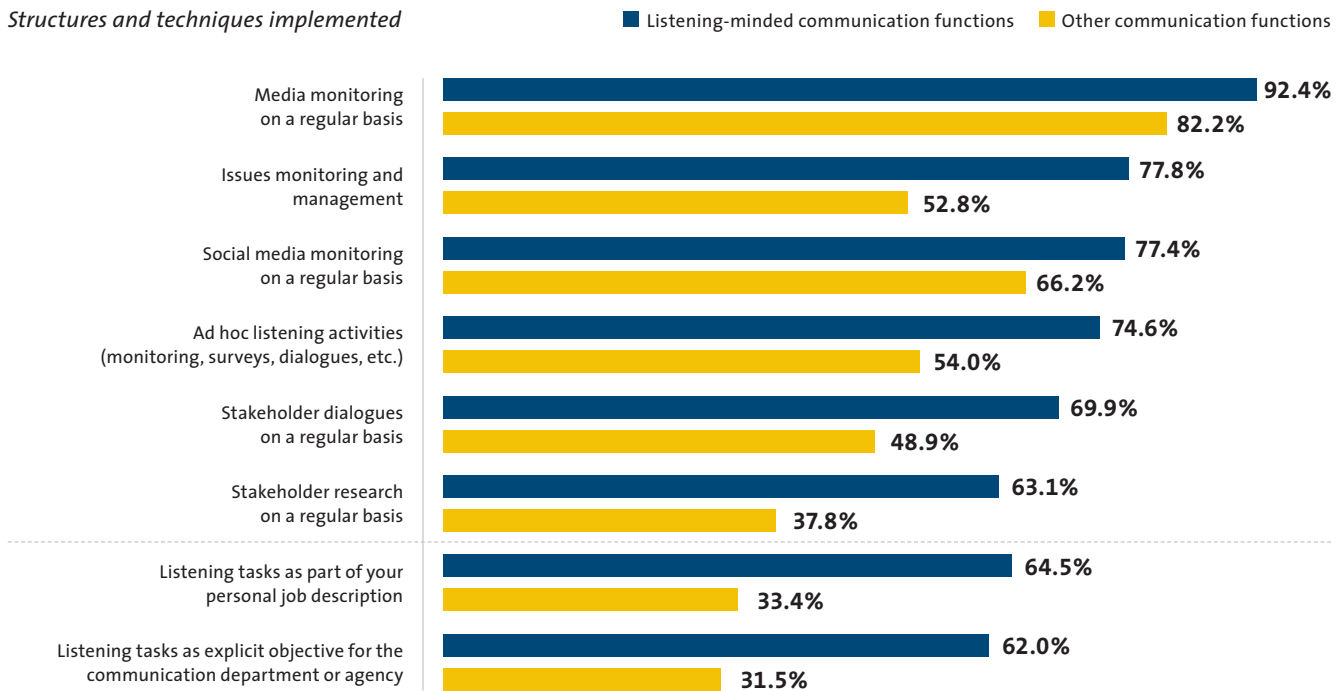
When explaining the relevance of strategic communication to top executives, eight out of ten communicators talk about positive effects of reputation, brands or organisational culture. Only every second tries to demonstrate economic effects. Many other ways exist to argue for the relevance of communication, and all of them are used by practitioners – so there is no consistent story told to those who pay the bill. However, the measure-

ment and evaluation results of this study emphasise that what respondents claim to do and what they monitor and measure do not match. The majority of activities reported as contributing to organisational goals are not monitored and measured, and for that reason it may be hard to defend, explain and legitimise them to top decision-makers.

## Organisational listening

While 78.3% of all organisations have established messaging strategies for reaching out to stakeholders, only 55.7% use a listening strategy to monitor the public sphere or integrate feedback from stakeholders. The most important structures and techniques for organisational listening are media monitoring on a regular basis, social media monitoring, ad hoc listening activities, issues monitoring and management and regular dialogues with stakeholders. It is clear from the findings that joint stock companies lead the way in the practice of organisational listening.

## Structures and techniques implemented



www.communicationmonitor.eu / Zeffass et al. 2015 / n min = 1,406 PR professionals in communication departments. Q 10: Which of the following have been implemented in your organisation or are planned for 2015? Percentages: agreement to implementation of each item. Highly significant differences for all items (chi-square test, p ffi 0.01).

**Table 2: Listening-minded communication departments are more advanced in implementing appropriate structures and techniques**

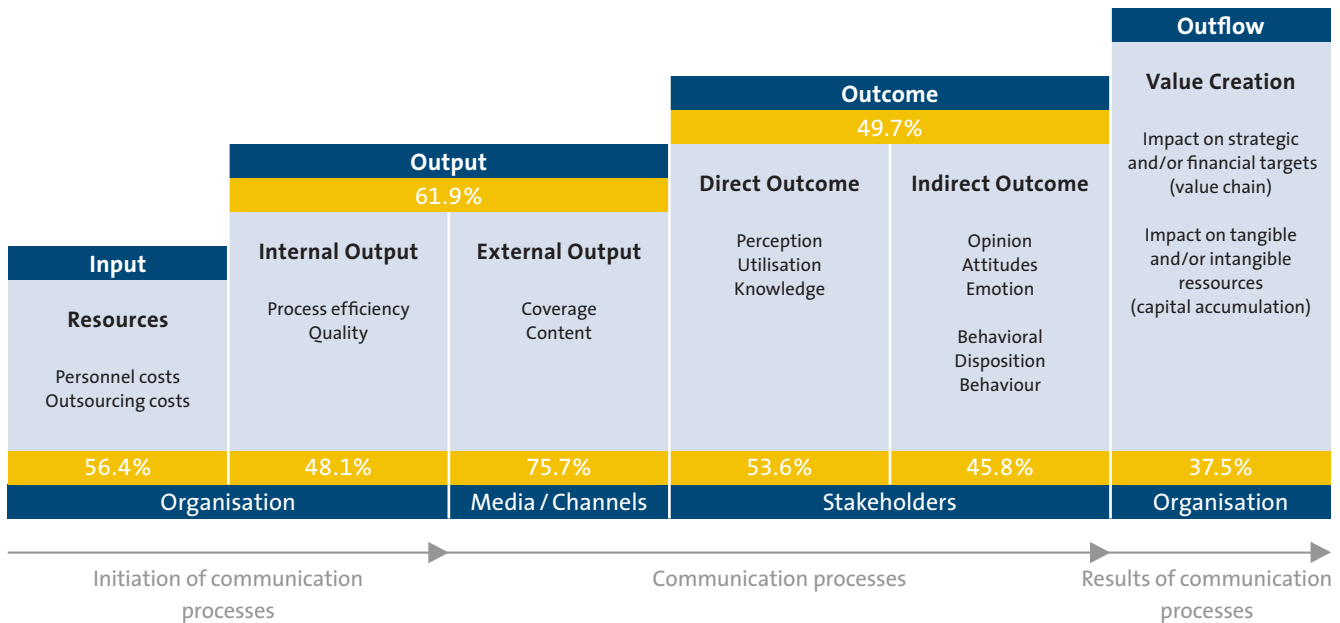
more are using these insights into processes to reflect goals and direction of communication strategies or planning new activities. Nevertheless, the value of data for managing strategic communication seems to be overseen by many professionals today.

## Measurement and evaluation

Assessing results and processes of communication enables practitioners to demonstrate the value of their activities. The 2015 Monitor shows that practices in this field have not changed much during the last five years. Output measures like clip-pings and media responses, internet/intranet usage and the satisfaction of (internal) clients lead the way before measures looking at input (costs) and outcome (stakeholder knowledge and attitudes), with outflow measures at the bottom (impact on financial/strategic targets or intangible/tangible resources). This shows that communicators are still focussed on: media and channels; on the stakeholders addressed by communication activities; and most importantly on any results this has for the achievement of organisational goals. Worth reflecting is also the low percentage using measuring data for leading communication teams or steering agencies and service providers. Slightly

## Relationship between agencies and clients

The use of agencies, consultancies and freelance practitioners is a common practice in communication management. Our findings verify this practice across all types of organisations in Europe. Most of the communication departments work on an ongoing basis with multiple agencies. In fact only one in five organisations (20.7%) do not work with outside agencies at all, and 13.8% of organisations work on an ongoing basis with a single "agency of record". However communication departments and agencies have very different perceptions of why they work together. While both sides are close on the need to integrate creativity and use additional arms and legs, the agencies are more optimistic about their overall value and contribution to the client organisations when compared with the clients' own responses. There are also wide differences in assessing reasons for agency-client conflicts. While clients see the main reason



www.communicationmonitor.eu / Zerfass et al. 2015 / n min = 1,496 PR professionals in communication departments. Q12: Which items are monitored or measured by your organisation to assess the effectiveness of communication management/public relations? Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5. Figures depicted within the DPRG/ICV framework for communication measurement (Zerfass 2010).

**Table 3:** Many organisations focus only on a small part of the overall process when measuring communication activities

for conflicts originating in the lack of knowledge of the client's business and processes, nearly three quarters of agency respondents named unclear objectives and expectations as the main reason for conflicts. Obviously each side blames the other one for conflicts.

## Salaries

Each year the European Communication Monitor reports on salaries for communicators across Europe. In 2015 the majority of practitioners in Europe earn less than €60,000 per year (54.7%) and a quarter earn even less than €30,000 per year. In this last category the majority of respondents are from Romania, Ukraine, Croatia and Slovenia. At the



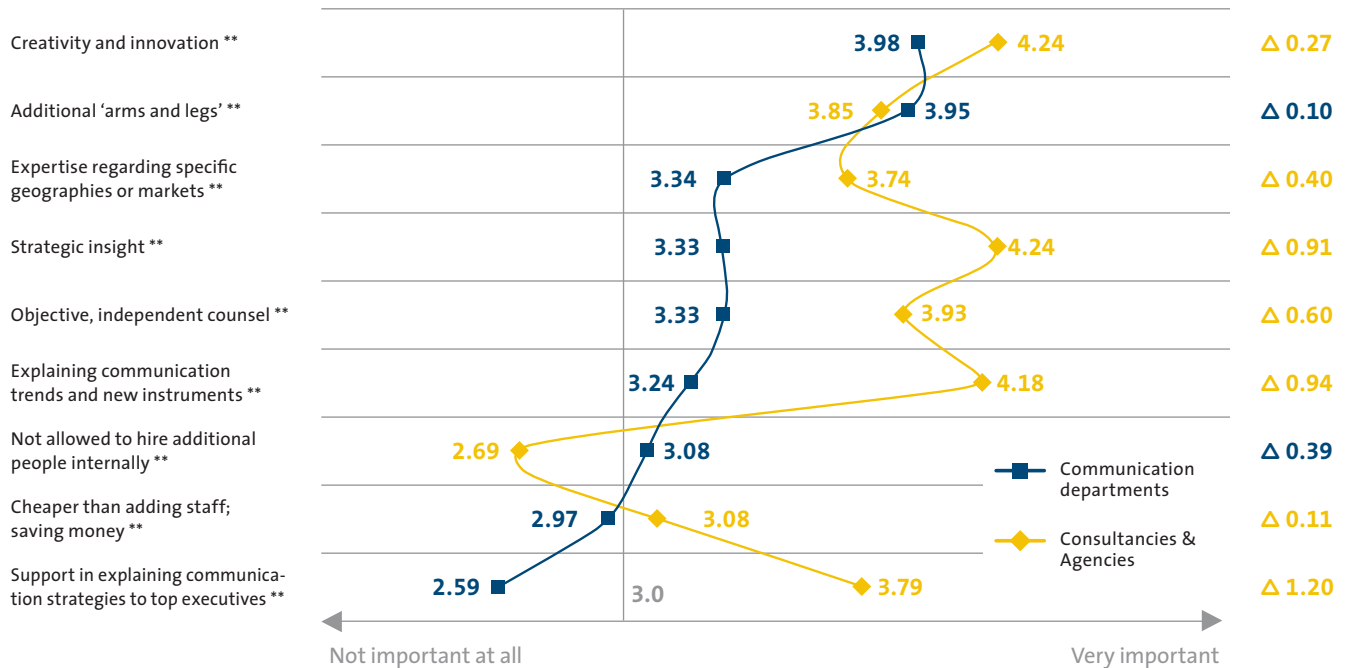
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top end of the pay scales the numbers are small and with sharp regional differences. For example only a fraction of the top earning practitioners are making over €300,000 (1.6%), followed by another fraction whose pay is between €200,001 and €300,000 (2.2%), and 4.3% are making between €150,001 and €200,000 per year. Generally, joint stock companies pay better than agencies, private companies, non-profit and governmental organisations. There are, however, big differences between countries. While there are only 1.3% of respondents from Switzerland that make less than €30,000, 40.0% from that country are making over €150,000 per year. At the top end of the salary scales and bandings, Switzerland is a clear outlier, with the next country showing nearly a fifth of their respondents at the top end being Germany with 18.0% making over €150,000, then Norway with 17.2% and the United Kingdom with 15.1% of respondents.



### Relative importance why organisations work with agencies, freelancers and consultants



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,277 PR professionals in communication departments; n = 652 PR professionals in agencies and consultancies. Q 19-C: Why does your organisation work with agencies, freelancers and communication consultants? Q 19-A: Why does your average client work with agencies, freelancers and communication consultants? Scale 1 (Not important at all) – 5 (Very important). Mean values. \*\* Highly significant differences (One Sample t-test,  $p \leq 0.01$ ). \* Significant differences (One Sample t-test,  $p \leq 0.05$ ).

## Characteristics of excellent communication functions

This year, the Monitor employed a new method to identify excellent communication functions, combining conceptual considerations with self-assessments of communicators and statistical analyses to identify which characteristics make a difference. Excellence is based on the internal standing of the communication function within the organisation (influence) and external results of the function's activities as well as the function's basic qualifications (performance). There are significant differences between excellent and normal communication functions. Excellent communication departments use mass media and their products more frequently, they help to reach overall goals more often than other communication functions/departments, they have professionals with higher levels of experience in evaluation

**Table 4: Clients and agencies have different perceptions of why they work together**



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practices, and they are more active in using insights from communication measurement in their organisations. They are also more likely to, and will with increased frequency, collaborate with other functions and departments within the organisation. Interestingly, excellent communication departments also hire agencies and consultancies for different reasons than other communication functions. They hire support more often for creativity and innovation, expertise regarding specific geographies or markets, strategic insight, objective counsel and for explaining/understanding communication trends and new instruments. ●

