

# DIGITAL AND VISUAL

The European Communication Monitor 2017 shows that the strategic communication function is undergoing a fundamental transformation.

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Information and communication technologies and the digital, social and mobile media that develop from them are fundamentally changing strategic communication. This is far more than an instrumental development – today's economic, social and business environment forces us to rethink the mission and contribution of communication in organisations.

The results of the 2017 European Communication Monitor present this transformation in many domains, four of which are presented in this article: visualisation of communication, automatisisation and robots, the need for strategy taking precedence over operations, and that communication quality must become certified, i.e. evidence based and not only implicitly assumed. Communication management has entered the 21st century as a recognised function, but its full affirmation depends on its ability to take the lead in embracing hypermodernity (as an era following postmodernity) and its communicative features.

## From words to pictures

For millennia, western civilisation has been based on words. We are a literal civilisation. Our education is about reading and writing. Whatever social problem we have, we expect to solve it with higher literacy ('health literacy', 'financial literacy', 'media literacy' and so on). This era may be over. 94.4 per cent of the communicators interviewed for the 2017 European Communication Monitor witness a trend from verbal towards visual communication. Seven out of 10 communicators experience rising demand for visual communication from their stakeholders. 89.5 per cent agree that visual communication requires new competencies by practitioners, but only every second believes specific management processes are needed to master the upcoming challenges (Figure 1).

The problem is that, for decades, the most sought competency in communication was written language, first native tongue and later also English. It is therefore not unusual that every second communication professional admits to have limited competencies in visual communication.

The fastest growth in visual communication is in the use of online videos (e.g. web clips), infographics (e.g. explanatory content), instant photos (spontaneous, unedited) and business graphics (such as tables and figures) – all directly related to advances of digital, social and mobile media. With mobile taking the pole position, this trend will only accelerate.

As digital natives (people who were born in the digital age) grow older and become the majority of customers, employees and other stakeholders, visual may take precedence over literal with unforeseeable consequences. Professional communicators must catch up.

Visual communication requires specific competencies by communication professionals



Visual communication requires specific management structures and processes



■ Agree (scale 4–5) ■ Neutral (scale 3) ■ Disagree (scale 1–2)

Fig. 1: Prerequisites for handling visual communication in organisations

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# “Today’s economic, social and business environment forces us to rethink the mission and contribution of communication in organisations.”

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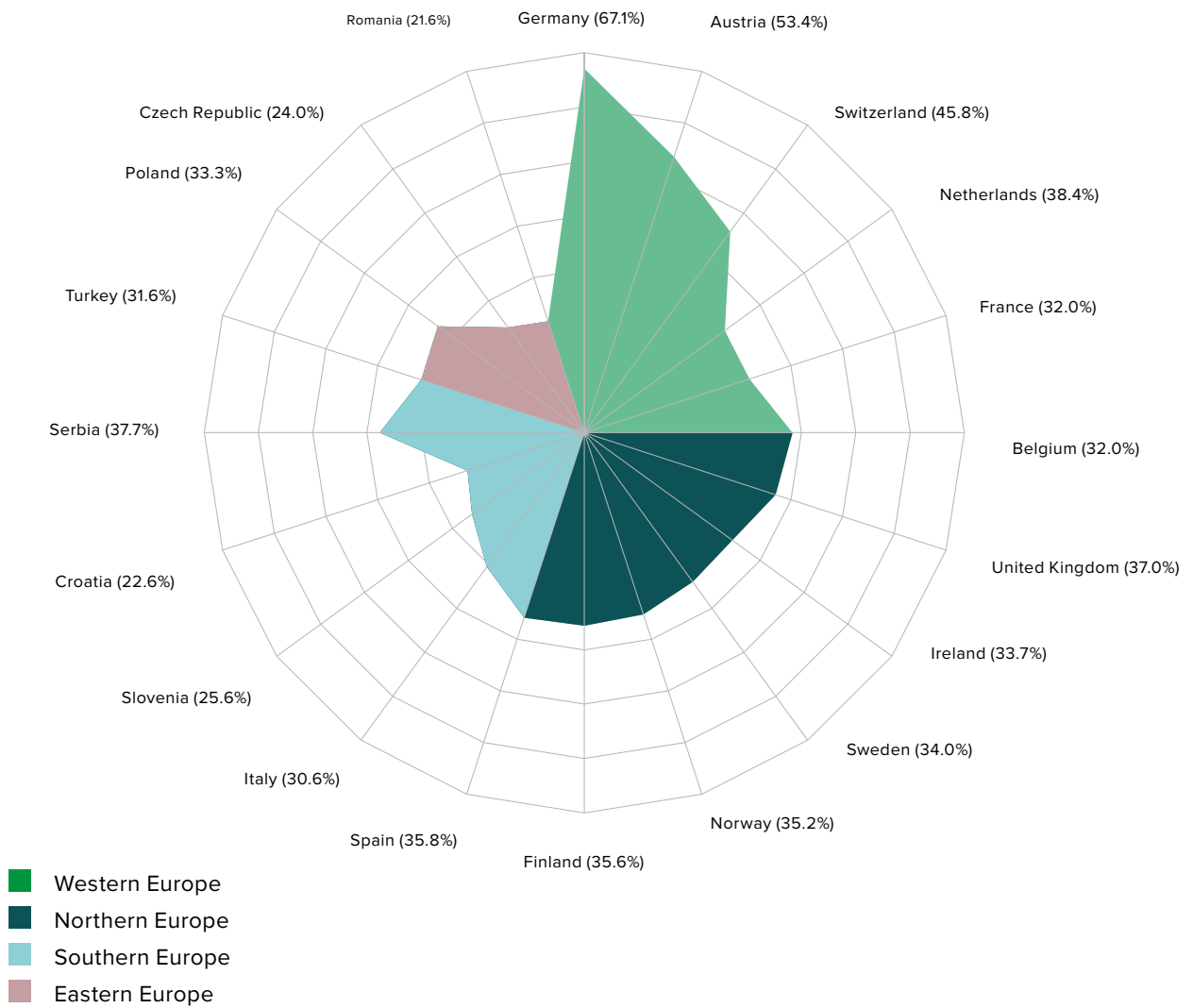


Fig. 2: Attention to the debate about social bots in key countries across Europe

## From analogue to digital

Artificial intelligence and robots are becoming normal parts of our lives. We can talk to our smartphones who predict our needs, and our cars can park without our attention. As machines have replaced many manual workers, so will artificial intelligence replace many intellectual workers – communicators included. Software robots, also known as social bots, produce many sports reports that in the past were compiled by sports journalists. Press releases about financial data can be automatically produced and distributed by software

tools. Social bots were used in political campaigns in the United Kingdom (in the run up to the Brexit referendum) and in the United States (during the 2016 presidential campaign).

Yet although it is obvious that social bots are influencing an ever greater part of social, commercial and political communication, the 2017 European Communication Monitor shows that many communication professionals in Europe neglect the trend. Only one in three follow debates about social bots, and 16 percent have no idea about the topic at all. This might explain why only six per cent of organisations use social bots and only 8.5 per cent plan to use them in the near future. However, knowledge and ignorance are not

equally distributed around Europe. Professionals in Western and Northern Europe are much more attentive to the social bots phenomenon than their colleagues in Southern and Eastern Europe (Figure 2).

## From operational to strategic

While coping with the digital evolution and the social web, together with linking business strategy and communication, tops the list of the most important strategic issues in Europe, professionals in Europe still contribute to overall success of their organisation

### The contribution of the communication department to overall success includes ...

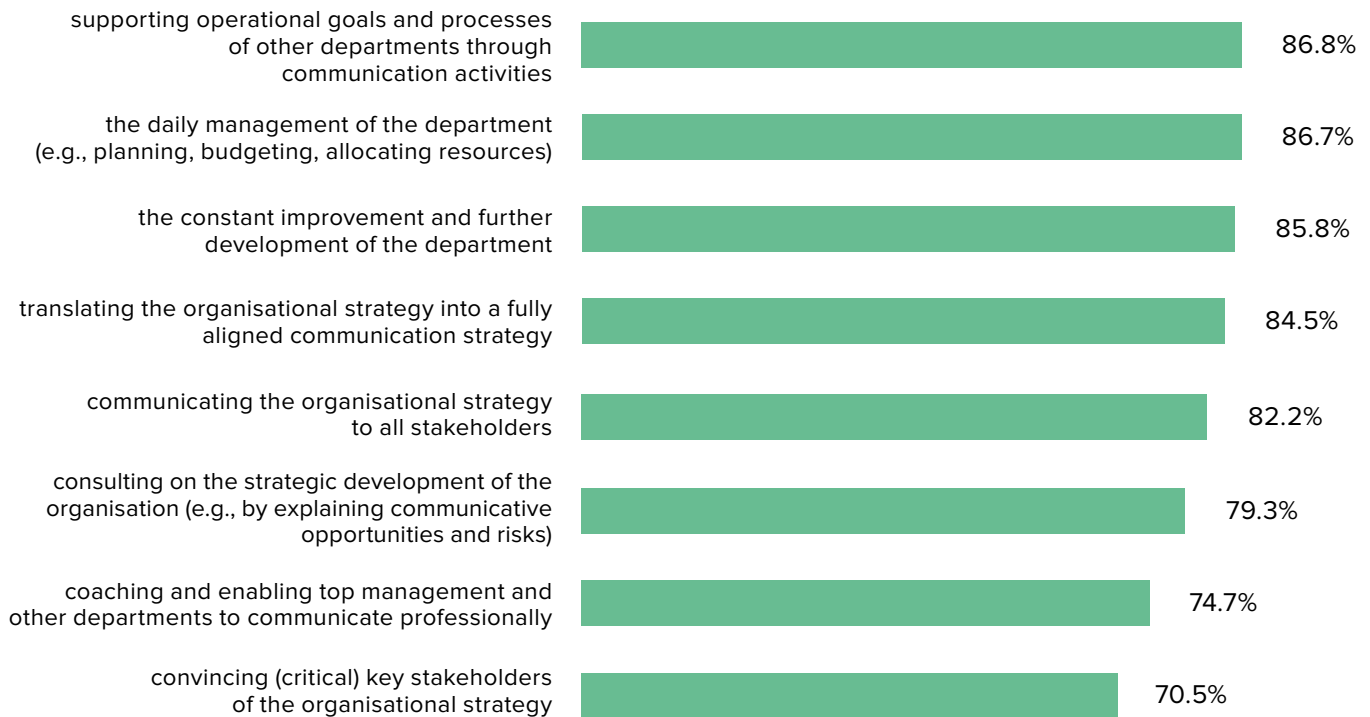


Figure 3: Perceived contributions of communication departments to organisational success

## Organisations with certified quality management processes for ...

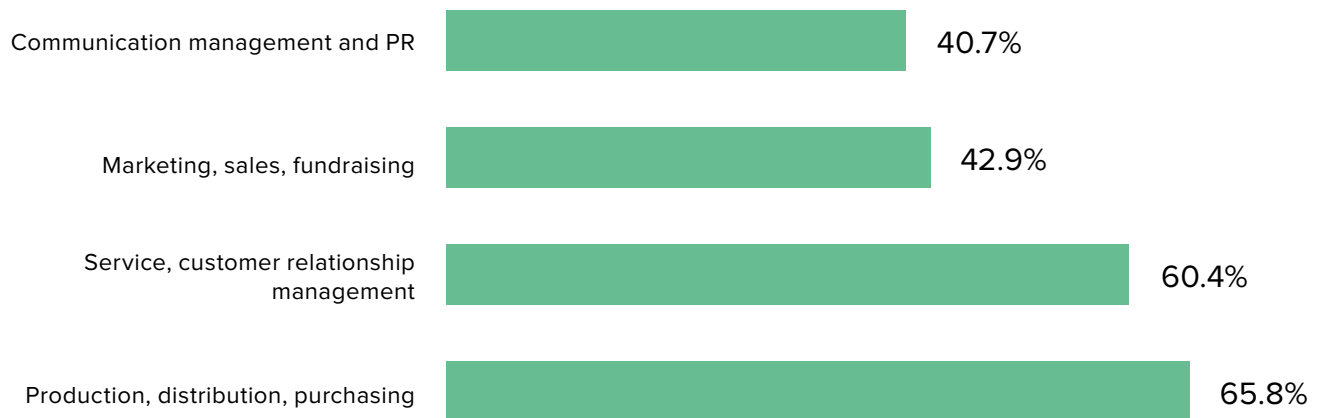


Figure 4: Prevalence of quality management in core organisational functions

**“Although social bots are influencing an ever greater part of social, commercial and political communication, many communicators in Europe neglect the trend.”**

more with operational than strategic activities (Figure 3). In such a context, it is no wonder that top managers are not aware of the full range of contributions provided by their communication departments.

The European Communication Monitor divides communication departments between excellent and other departments. Approximately 20 per cent of communication departments are ranged as excellent (based on influence they have on top management and their performance, success and competence), and they are more proficient in visual communication, more acquainted with social bots and their perceived contribution of both strategic and operational activities (and the demand for them by their top management) is higher than in and for the other communication departments.

### **From assumed to certified quality**

Strategic communication has historically attracted ‘soft’ people, people who like people and not numbers. On the other side, the core top management disciplines attracted ‘hard’

#### **SURVEY HIGHLIGHTS**

- Professionals working in communications are fully aware of the trend towards increased visualisation in society, however every second professional has limited visual competencies.
- Social bots are seen largely as a threat for society and organisations – an explanation why only a few organisations already use social bots.
- A cultural turn towards hyper-modernism changes the way organisations communicate with their stakeholders.
- Quality management and continuous improvement is less common in communication departments and marketing, compared to other organisational functions.
- Communicators in Europe consistently put two issues at the top of their concerns: linking business strategy and communication and coping with the digital evolution and the social web.
- Strategic contributions of communication still lag behind their operational features.

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## “Who else should own this brave new world if not professional communicators?”

people who were comfortable with numbers. And still today, communication management is steadily but slowly gaining recognition as equal among management disciplines, moving from operational expenditures into investments. But for that journey to end successfully, professional communicators must learn benchmarking against the best, ensuring and measuring quality, and calculate the return on investment where possible.

When it comes to quality management, the communication function is lagging slightly behind marketing, sales and fundraising, but substantially behind services and customer relationship management, and even more behind production, distribution and purchasing (Figure 4).

“The times, they are a changin’” sings Nobel laureate Bob Dylan and, as always, there will be winners and there will be losers. Strategic communication (in all its denominations such as corporate communication, communication management, public relations, etc.) must not only jump on the wagon of recent progress, but it must find a way to its steering wheel.

Communication and its features (digitalisation, visualisation, software robots for

### ABOUT THE EUROPEAN COMMUNICATION MONITOR 2017

In July 2017, the European Public Relations Education and Research Association (EUPRERA) and the European Association of Communication Directors (EACD) published the results of their eleventh annual study on the state-of-the-art of communication management and trends within the profession across Europe. The European Communication Monitor 2017 is based on responses from 3,387 communication professionals in 50 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, 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. A wider board of professors and national research collaborators ensure that the survey reflects the diversity of the field across Europe.



Full results are available in a free PDF report (136 pp.) at [www.communicationmonitor.eu](http://www.communicationmonitor.eu) and as a booklet: Zerfass, A., Moreno, Á., Tench, R., Verčič, D., and Verhoeven, P. (2017). *European Communication Monitor 2017. How strategic communication deals with the challenges of visualisation, social bots and hypermodernity. Results of a survey in 50 Countries*. Brussels, ISBN 978-942263-47-4.

automated communication and similar) are at the very core of contemporary organisational and social transformations. Who else should own this brave new world if not professional communicators? ●