

# COMMUNICATION IN TURBULENT TIMES

*Insights from the European Communication Monitor 2009 – a joint survey by researchers from 11 universities which helps to explore current issues and the future of the profession.*

*by Piet Verhoeven, Ralph Tench and Ansgar Zerfass*

**A**s communicators we live in interesting and often challenging times. Evidence from the latest survey conducted by renowned universities together with Communication Director and the European Association of Communication Directors (EACD) only reinforces the shifting sands that communicators are standing on. The most significant is the global downturn in the economy that challenges the practice of public relations in Europe in several ways. Overall, every second professional reports budget cuts, with numbers ranging from 58 per cent in Southern Europe to 42 per cent in Northern countries. Reducing staffing

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numbers is mentioned by almost 22 per cent of the European professionals. However, the psyche of the sector is still healthy: thinking about the communication function within their organisation or of their consultancy, eight out of ten practitioners are optimistic for 2010. These figures emerge from the “European Communication Monitor 2009”, a yearly survey among European public relations practitioners. Besides the figures on the influence of the economic situation in Europe on the field of public rela-

tions, the monitor also sheds light on the professional roles that PR people practice in Europe and on several strategic issues for the field, for example concerning the role of internal communication in organisations.

**RESPONDENTS FROM 34 COUNTRIES** The European Communication Monitor (Zerfass et al., 2009) was held for the third time in a row this year, after the monitors of 2007 and 2008. It is the most comprehensive analysis of communication management and public relations in Europe. The aim of the research sponsored by media intelligence agency, Cision, is to monitor trends in communication management and to analyse the changing framework for the PR profession in Europe. The survey consisted of a questionnaire with 17 sections, based on hypotheses and instruments derived from previous research and literature. A pre-test was held with 50 practitioners in 10 European countries to evaluate the questionnaire. 20.000+ professionals throughout Europe were personally invited via e-mail to join the English language

online survey in May 2009. In total 1.863 fully completed replies were analysed from the population (communication professionals in Europe). Respondents are from 34 countries. They are characterized by a high level of experience: the average age is 42 years, 93 per cent have an academic degree, 58 per cent are working in the field for more than ten years and 84 per cent hold the position of head of communication, unit leader or agency CEO. Even though the findings can not claim representativeness, because the population of PR professionals in Europe is unknown, they give an insightful picture of the state of the art of the profession in Europe in 2009.

**SUPPORTING ORGANISATIONAL GOALS** Compared to last year's survey we see a modest increase in the perception of the profession. For example 73 per cent of respondents this year compared to 71 per cent last year are taken seriously by senior management. Yet the executive influence is still as low as the year before, 64.4 per cent of the respondents are involved in decision making and planning. This can be explained by taking a look at the professional roles enacted by European PR professionals. These roles shape and reflect the relationship between communication and business strategies in organisations. The majority of the practitioners are so-called "strategic facilitators" (56 per cent) who help to define business strategies and at the same time support business goals by managing communication. These strategic facilitators practice two way communications in order to contribute to organisational objectives; they listen on behalf of the

organisation systematically to voices outside and they speak on behalf of the organisation with the relevant stakeholders of the organisation. They develop communication plans that support the strategy of the organisation and help the top management to adjust the organisation to demands from stakeholders and society. The combination of helping to define organisational goals and managing the execution of communication plans at the same time makes these strategic facilitators successful in organisations. Demonstrating this fact 64 per cent of them are head of the communication department or CEO of a communication agency. This influential role of the strategic facilitator is prevalent in private companies; in NGOs as well as in Northern Europe.

**ADDITIONAL ROLES** The second largest professional PR role in Europe is the "operational supporter" role, executed by 29 per cent of the practitioners. The main focus here is the management of communication activities that fit the business strategy. Helping to define business strategy is not as common for the role as it is with the strategic facilitators. Furthermore respectively 10 per cent and 5 per cent of the practitioners in Europe are "isolated experts" or "business advisers". In both of these roles there is not much management of communication activities. The focus of business advisers is helping to define business and isolated experts are mostly concerned with the public image of the organisation and do not see a clear link between what they do and the strategy of the organisation. Overall, taking all the different roles together, almost 85 per cent of the European

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PR practitioners help to realise business goals by planning and executing communication activities. A much smaller group of almost 61 per cent also feels responsible for helping to define and shape the strategies of the organisation. In the overall communication policies and activities the dissemination of messages is still dominant over listening to the outside world and reflecting on what that outside world has to say about the organisation.



**IMPACT OF THE RECESSION** The global economic downturn has had an inevitable impact on the profession. There have been consecutive years of growth in the staff numbers and increases in communication budgets. This trend has come to an abrupt stop since last year. From the sample 47 per cent reported budget cuts and 22 per cent report that staffing levels have been reduced. Unsurpris-

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ingly both of these factors are more keenly felt by joint stock and private companies. These two groups also reported a significant need to focus communication activities on the organisation’s most relevant stakeholders and issues (66 per cent and 64 per cent respectively). The governmental and non-profit sectors acknowledge the importance of the economic climate but they appear to be under less pressure than their private sector counterparts. This will be an interesting issue to monitor as the economic conditions trickle down through national government budgets and departments and into public sector and third sector spheres and finances. Up to now, PR practition-

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

**RESPONDING TO THE MEDIA CRISIS** Linking to the economic environment are patterns of change in the landscape which could have a dramatic impact on the working life of the communications professional. The media landscape is being affected by forces in addition to the financial constraints of the current recession. This is leading to a mass media

**Role enactment and relationship to organisational goals**

|   | Strategic Facilitators | Operational Supporters | Business Advisors | Isolated Experts |
|---|------------------------|------------------------|-------------------|------------------|
| Help top management to adjust the organisation to demands from stakeholders and society | 63,2%                  | 36,8%                  | 43,0%             | 24,2%            |
| Educate members of the organisation to behave more communicatively                      | 59,0%                  | 44,8%                  | 54,8%             | 30,5%            |
| Listen systematically to voices outside of the organisation                             | 68,9%                  | 53,4%                  | 53,8%             | 44,2%            |
| Inform stakeholders about the opinions of the organisation                              | 62,6%                  | 58,2%                  | 36,6%             | 38,9%            |
| Develop communication plans that support the strategy of the organisation               | 84,8%                  | 76,6%                  | 61,3%             | 48,9%            |
| Shape the public image of the organisation  | 83,0%                  | 78,3%                  | 67,7%             | 64,2%            |

n = 1,863 PR Professionals from 34 countries; source: www.communicationmonitor.eu

crisis which is seeing the numbers of media outlets declining as well as the numbers of journalists working in the sector. The reaction from the sample to the changing media structures is positive. They claim to be adapting their practice to reflect the media environmental changes. A majority of 72 per cent claim communicators will adapt to new routines in journalism and a third (33.2 per cent) of the respondents believe they will in fact help the media to survive the current crisis for the sector, mainly by providing free content. A comment to watch is that nearly a fifth of the respondents (19 per cent) state that being reported in the media will be less relevant. Comparing this with established and traditional views of public relations as a means to obtain and maintain media profile is a significant and interesting challenge. This is certainly something to track further and could well challenge many 'old school' perceptions of the role of public relations as media relations.

### GROWING IMPORTANCE OF INTERNAL COMMUNICATION

An important question for the ECM survey since 2007 has been about the current and future development of the fields of practice in public relations and communication. This question aims to tease out the respondents' opinions about what are the most important parts of communication management and how will patterns of relevance and importance shift and change. From this same question respondents in 2008 were surprisingly accurate in predicting Internal Communications and Change Management as increasing in importance by 2011. Already in 2009 this part of communication management has moved up to fourth

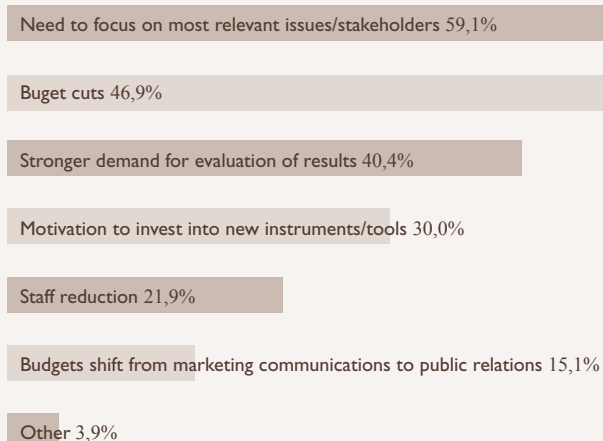
position from last year's sixth and has therefore overtaken Investor Relations/Financial Communications. Further reinforcing the increased focus on this function, respondents are predicting that by 2012 Internal Communication and Change Management will be the second most impor-

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tant discipline behind Corporate Communication. This suggests a consistent awareness of the current and future importance of the activity which seems to be recorded and measured each year by the respondents.

**ONE OF THE MAIN PROBLEMS: INFORMATION OVERLOAD** As organisations navigate through difficult times it is unsurprising that communicators see the value and importance of internal communication. The respondents indicate two strong priorities for the next year as being to link internal communications to corporate strategies (69 per cent) and supporting organisational change and restructuring (66 per cent). At the same time one of the main problems is information overload and 55 per cent place a priority on dealing with this issue. These figures

### Influence of the economic downturn on communication activities



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are even higher for colleagues working in governmental and non-profit sectors (66 per cent and 64 per cent respectively). Despite the prevalence of social media in practice less than a third of respondents say that dealing with social media proactively or defensively is one of the priority issues for internal communications. Contradictorily 54 per cent think that using online communities for internal dialogue will be important in the next three years. When considering important future action in internal communication an impressive 74 per cent of respondents priori-

tised the need to train managers to act as communicators. Reassuringly perhaps for public relations practice this was followed by the need to spread authentic content instead of polished messages (65 per cent).

**KEY FINDINGS AND LEARNINGS** The survey reveals deep insights into the structure of the field, highlighting the most important issues for communication professionals in different regions and organisations as well as specific concerns like evaluation and measurement. Some of the most important findings are:

**Most important disciplines in communication management in Europe**

| 2009   | 2012   |   |
|--|--|---|
| Corporate Communication                      | Corporate Communication                      | ➔ |
| Marketing/Brand and Consumer Communication   | Internal Communication and Change Management | ⬆ |
| Crisis Communication                         | Marketing/Brand and Consumer Communication   | ➤ |
| Internal Communication and Change Management | CSR and Sustainability                       | ⬆ |
| Public Affairs/Lobbying                      | Public Affairs/Lobbying                      | ➔ |

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1. Full potential of strategic communication not exploited. There is still a lot of room to extend the auspicious professional role of the strategic facilitator: a PR professional who systematically combines outbound (“dissemination”) activities with inbound (“listening and reflection”) activities. Until now, this role is practiced only by 56 per cent of the respondents.

2. Influence depends on role-taking, hierarchical position and years of practice. Communication executives enacting the “strategic facilitator” role are significantly more influential than the average. Furthermore the research shows that influence on management depends on the geographical location of the organisation as well as on practitioners’ experience and position, and not on their age and professional or academic education.

3. Economic recession influences PR practice negatively. Both the economic recession and the crisis of the mass media sector have changed the framework for communication management in Europe. The long-term upswing of the occupational field seems to have come to an end.

**Main challenges in internal communication within the next twelve months**

|  |       |
|--|-------|
| Linking internal communication to corporate strategies | 68,8% |
| Supporting organisational change and restructuring     | 66,1% |
| Dealing with information overload                      | 54,7% |
| Coping with the digital evolution and the social web   | 34,1% |
| Re-establishing lost credibility in management         | 28,7% |
| Avoiding reputation risks through online word-of-mouth | 28,4% |
| Internationalisation of internal communication         | 19,5% |

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## EXECUTIVE SUMMARY

- ▶ a clear majority of professionals in Europe execute communication based on organisational goals, but far less are helping to define overall strategies.
- ▶ corporate communication has overtaken marketing/consumer communication as the predominant field of practice.
- ▶ internal communication and change management is getting more and more important, but linking those efforts to organisational strategies is a major challenge.
- ▶ professionals predict a strong growth of online channels and social media, with a clear favourability for online communities and videos on the internet, followed by weblogs. Other platforms like RSS feeds, podcasts, wikis and Twitter are valued by less than 20 per cent of the respondents.

*4. Internal communication and CSR are steadily growing. Respondents expect a changing relevance of the various disciplines within the range of strategic communication. Corporate communication has taken the lead in the field, followed by marketing/brand and consumer communication in second place. Internal communication and corporate social responsibility / sustainability have grown and they are predicted to be the fastest-growing fields of practice until 2012. However, CSR issues are*

## LITERATURE

A detailed report is available as a book published by EACD and Helios Media: Zerfass, A., Moreno, A., Tench, R., Verzié, D., & Verhoeven, P. (2009): European Communication Monitor 2009. Trends in Communication Management and Public Relations – Results of a Survey in 34 Countries, Brussels: Sept. 2009. Available at [www.eacd-online.eu](http://www.eacd-online.eu)

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*not perceived as urgent as in previous years.*

*5. Strong growth of online channels, sceptical view on Twitter. The relevance of social media has almost doubled during the last 24 months. 19.5 per cent say that those channels are important for public relations nowadays. Online communities (social networks) and online videos are leading the field with three out of ten professionals favouring these platforms, while 25 per cent say that weblogs are relevant. This will change considerably: nearly every social media platform is judged much more important in 2010. Despite strong reports in the media, micro blogging with Twitter is only considered important by 14 per cent of communication professionals in Europe until now, and 39 per cent state that it will be important next year.*

*6. Salary correlates with hierarchy and strategic role. Salaries of communication professionals differ widely throughout Europe. Countries with a well-established occupational field in Western and Northern Europe lead the field. At the same time, women are under-represented in the higher bands of annual income, which points out that a glass ceiling still exists. Professionals enacting the “strategic facilitator” role tend to be in the top of the salary ranks, whereas a large portion of the “isolated experts” are badly paid. █*

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