

# EUROPEAN COMMUNICATION MONITOR 2018



## HOW INFORMATION PROVISION CREATES CORPORATE VALUE

### INSIGHTS FROM THE EUROPEAN COMMUNICATION MONITOR 2018

*STRATEGIC COMMUNICATION AND THE CHALLENGES OF FAKE NEWS,  
TRUST, LEADERSHIP, WORK STRESS AND JOB SATISFACTION.  
RESULTS OF A SURVEY IN 48 COUNTRIES.*

Prof. dr. Dejan Verčič, Prof. dr. Ángeles Moreno, Dr. Piet Verhoeven

**European Communication Summit**

June 13, 2018

# Program

Introduction and context

The European Communication Monitor 2018

Information provision for decision makers by communication professionals

Responding to reality: Fake news and trust

Questions and discussion

## Introduction and context

Dr. Piet Verhoeven  
*University of Amsterdam*  
*The Netherlands*



# European Communication Monitor (ECM)

## EUROPEAN COMMUNICATION MONITOR 2007

Trends in Communication Management and  
Public Relations – Results and Findings



UNIVERSITÄT LEIPZIG

hugin

## EUROPEAN COMMUNICATION MONITOR 2018

STRATEGIC COMMUNICATION AND THE  
CHALLENGES OF FAKE NEWS, TRUST, LEADERSHIP,  
WORK STRESS AND JOB SATISFACTION  
RESULTS OF A SURVEY IN 48 COUNTRIES

ORGANISED BY:



PARTNERS:

PRIME RESEARCH

Fink & Fuchs

COMMUNICATION-DIRECTOR

# Globalization of ECM

## EUROPEAN COMMUNICATION MONITOR 2016

EXPLORING TRENDS IN BIG DATA, STAKEHOLDER  
ENGAGEMENT AND STRATEGIC COMMUNICATION.  
RESULTS OF A SURVEY IN 43 COUNTRIES.

## ASIA-PACIFIC COMMUNICATION MONITOR 2017/2018

STRATEGIC CHALLENGES, SOCIAL MEDIA  
AND PROFESSIONAL CAPABILITIES.  
RESULTS OF A SURVEY IN 22 COUNTRIES.

## LATIN AMERICAN COMMUNICATION MONITOR 2016-2017

TENDENCIAS EN COMUNICACIÓN ESTRATÉGICA:  
BIG DATA, AUTOMATIZACIÓN, ENGAGEMENT,  
INFLUENCERS, COACHING Y COMPETENCIAS.  
RESULTADOS DE UNA ENCUESTA EN 17 PAÍSES.

ORGANISED BY:



euprera



EUROPEAN  
ASSOCIATION OF  
COMMUNICATION  
DIRECTORS

PARTNER:

PRIME RESEARCH

MEDIA PARTNER:

COMMUNICATION DIRECTOR



# Importance for the profession

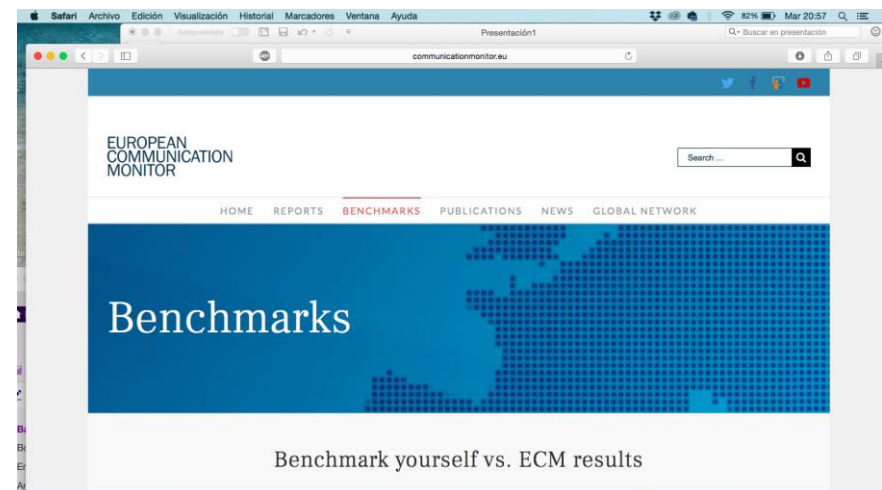
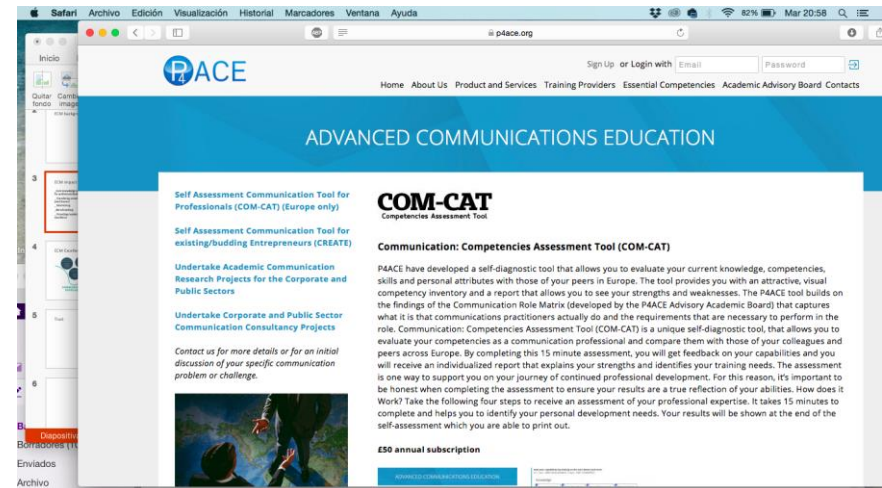
Core knowledge is the main driver for professionalization

Transferring scientific knowledge to practitioners

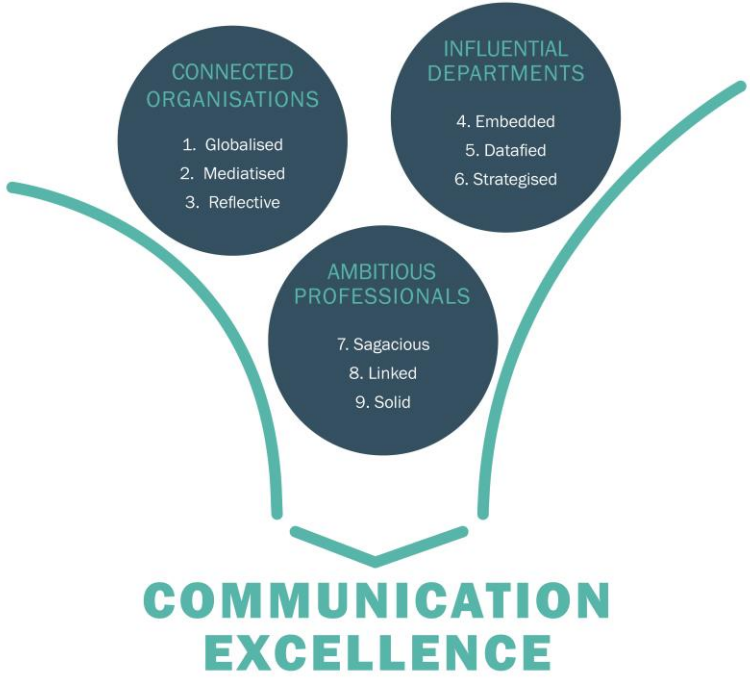
Monitoring

Benchmarking

Providing models for leadership and excellence



# Research team, model and book



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ORGANISED BY:



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COMMUNICATION•DIRECTOR

ONLY MEMBERS OF THE EUROPEAN ASSOCIATION OF COMMUNICATION DIRECTORS (EACD) CAN PARTICIPATE



# Topics 2018

Responding to reality: Fake news and trust

Information provision for decision-makers

Strategic issues for communication management

Leadership and organisational culture

Work engagement and trust in the organisation

Stress at work and factors driving it

Job satisfaction and willingness to change

Work environment and leadership index for communications

Salaries

Characteristics of excellent communication departments

## Demographic background of participants

### Position

Head of Communication, Agency CEO	36.8%
Responsible for single communication discipline, Unit leader	30.4%
Team member, Consultant	27.7%
Other	5.1%

### Organisation

Communication department in a		
▪ joint stock company	20.9%	73.4%
▪ private company	22.7%	
▪ government-owned, public sector, political organisation	19.0%	
▪ non-profit organisation, association	10.8%	
Communication consultancy, PR agency, freelance consultant	26.6%	

### Job experience

More than 10 years	65.3%
6 to 10 years	17.0%
Up to 5 years	17.7%

### Alignment of the communication function

Strongly aligned communication department	29.9%
Aligned communication department	56.7%
Weakly aligned communication department	13.5%

## Personal background of respondents

### *Gender / Age*

	Overall	Head of communication, Agency CEO	Team leader, Unit leader	Team member, Consultant
Female	58.1%	50.8%	58.1%	64.6%
Male	41.9%	49.2%	41.9%	35.4%
Age (on average)	41.3 yrs	45.6 yrs	41.5 yrs	37.4 yrs

### *Membership in a professional association*

European Association of Communication Directors (EACD)	12.0%
Other international communication association	11.4%
National PR or communication association	43.9%

### *Highest academic educational qualification*

Doctorate (Ph.D., Dr.)	6.4%
Master (M.A., M.Sc., Mag., M.B.A.), Diploma	63.1%
Bachelor (B.A., B.Sc.)	25.3%
No academic degree	5.2%

## Countries and regions represented in the study

*Respondents are based in 48 European countries and four regions*

Western Europe 29.7% (n = 919)	Northern Europe 24.2% (n = 748)	Southern Europe 30.2% (n = 934)	Eastern Europe 16.0% (n = 495)
Belgium Germany Netherlands Switzerland France Austria Luxembourg Liechtenstein Monaco	United Kingdom Sweden Finland Norway Ireland Denmark Latvia Lithuania Estonia Iceland	Italy Spain Portugal Slovenia Croatia Serbia Turkey Greece Bosnia and Herzegovina Macedonia Cyprus Malta Montenegro Albania Andorra Kosovo San Marino Vatican City	Romania Czech Republic Poland Russia Ukraine Bulgaria Hungary Slovakia Georgia Armenia Belarus



## Most important strategic issues for communication management until 2021



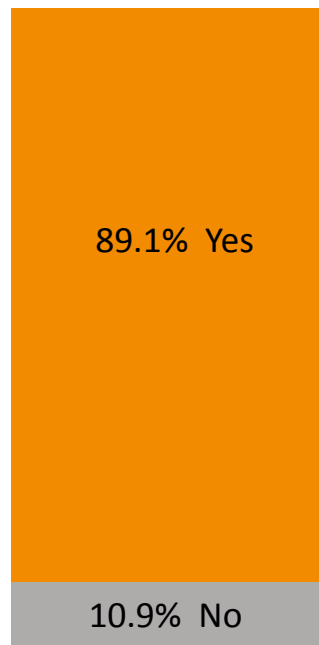
## Information provision for decision-makers

Prof. Dr. Dejan Verčič  
*University of Ljubljana*  
*Slovenia*

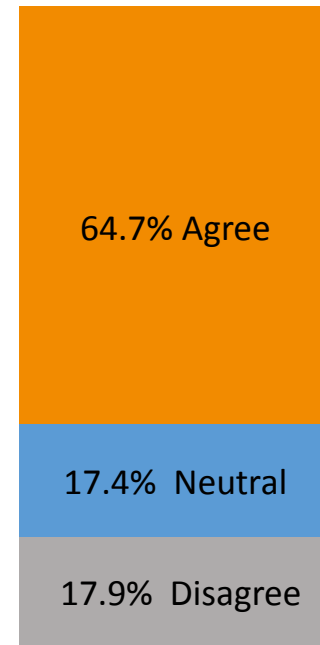


Providing information to decision-makers is a common practice in communication departments/agencies, but only two thirds consider it a core task

*Information is delivered to top management and/or (internal) clients*



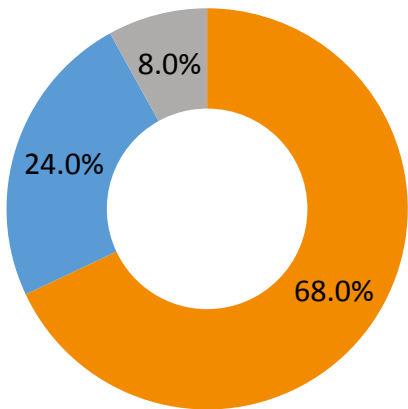
*Information providing is a core task for the department/agency*



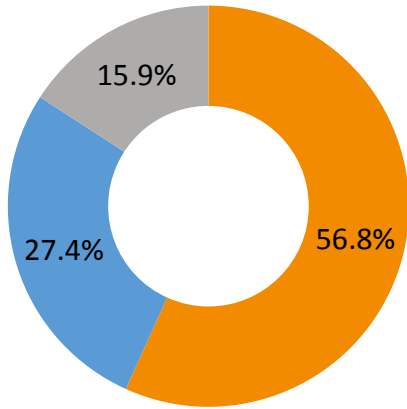
The majority of professionals agree that information providing helps to gain recognition and position communications – it will thus become more important

*Providing information for decision-makers ...*

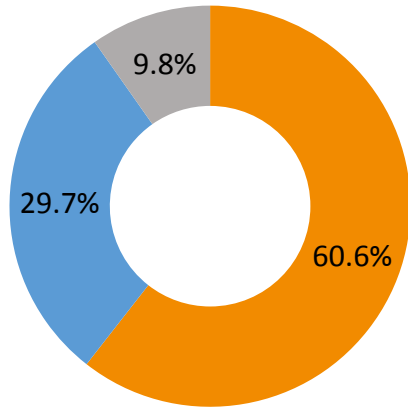
offers great opportunities to gain recognition from top management and (internal) clients



offers great opportunities to position ourselves against other departments/agencies



is gaining in relevance for our department/agency

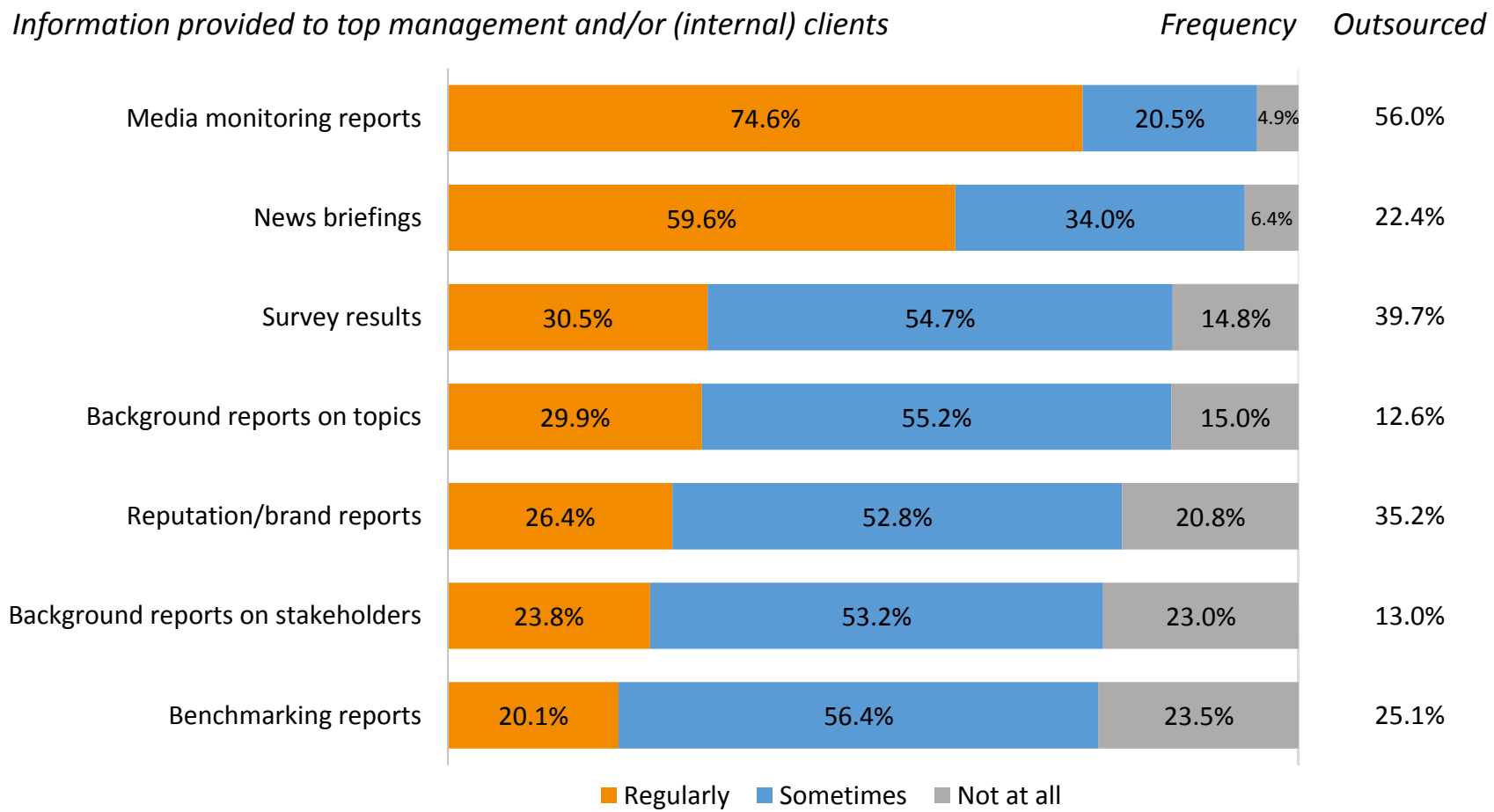


Agree Neutral Disagree

www.communicationmonitor.eu / Zerfass et al. 2018 / n ≥ 3,048 communication professionals. Q 7: Many communication departments/agencies provide insights to top management and (internal) clients by delivering information through daily news briefings, media monitoring, survey results, and other reports like scenarios or benchmarks. Please rate the following statements based on your experience. Scale 1 (Strongly disagree) – 5 (Strongly agree). Disagreement: scale points 1-2; Neutral: scale point 3; Agreement: scale points 4-5.



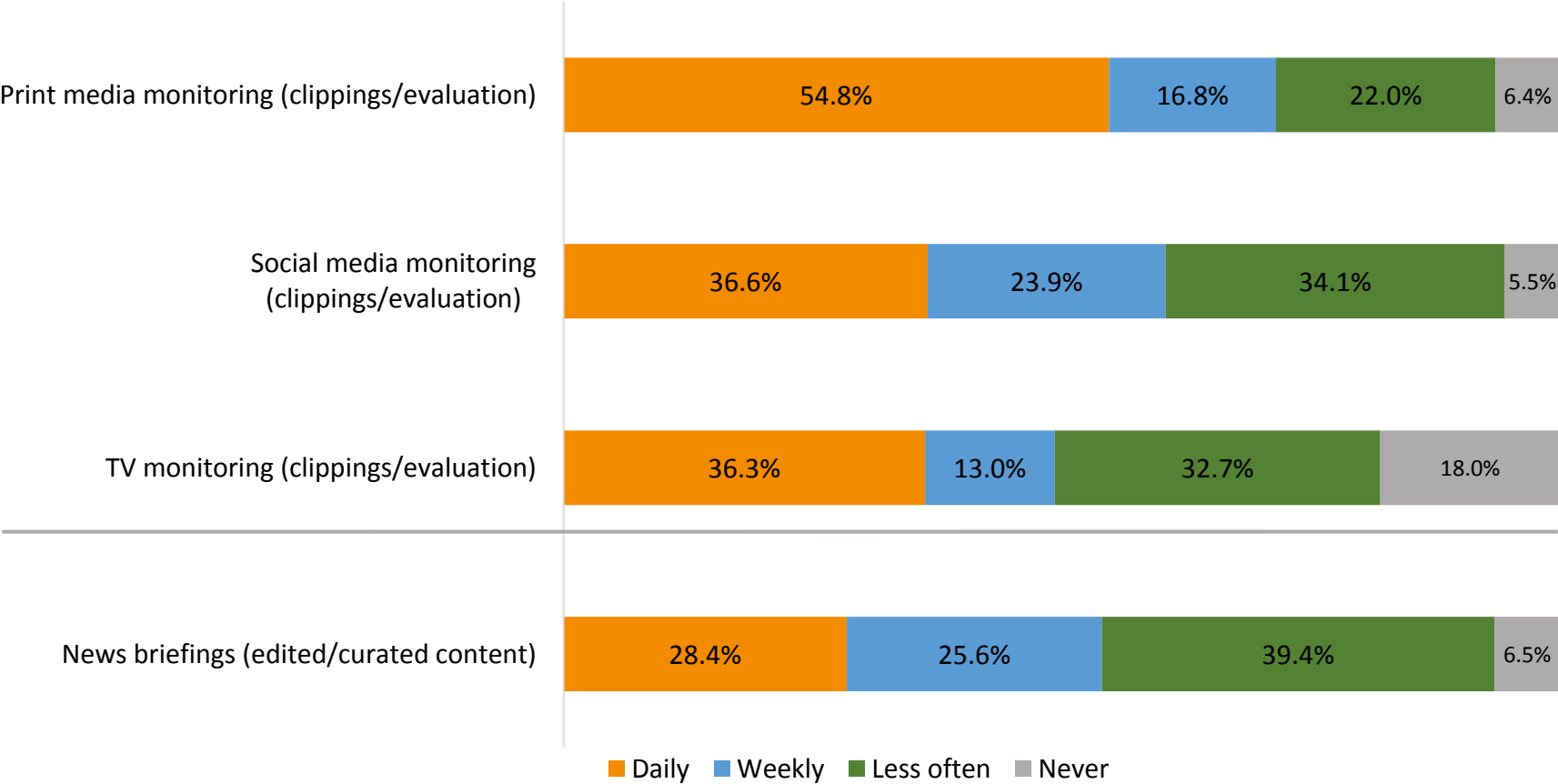
Various reports provided to decision-makers:  
Key ones are for monitoring social and mass media (and these are outsourced)



www.communicationmonitor.eu / Zerfass et al. 2018 / n = 2,740 communication professionals. Q 9a: How frequently does your department or agency provide the following information to top management and/or (internal) clients? Media monitoring reports (e.g., clippings and evaluation of mass media or social media news); News briefings (e.g., edited or curated overviews of news and discussions in mass media, social media, etc.); Survey results (e.g., employee or customer surveys); Background reports on topics (e.g., strategic issues, scenarios); Reputation/brand reports (e.g., based on image or brand evaluation); Background reports on stakeholders (e.g., potential opponents, influencers, collaborators); Benchmarking reports (e.g., internal/external comparisons). Q 9b: And which reports are mainly prepared by external service providers?

Up-to-date information is mostly restricted to the discourse in print media; social media monitoring and curated news briefings are less common

Frequency of monitoring reports and news briefings



## PRIME Insights

## Editorial Management Summaries

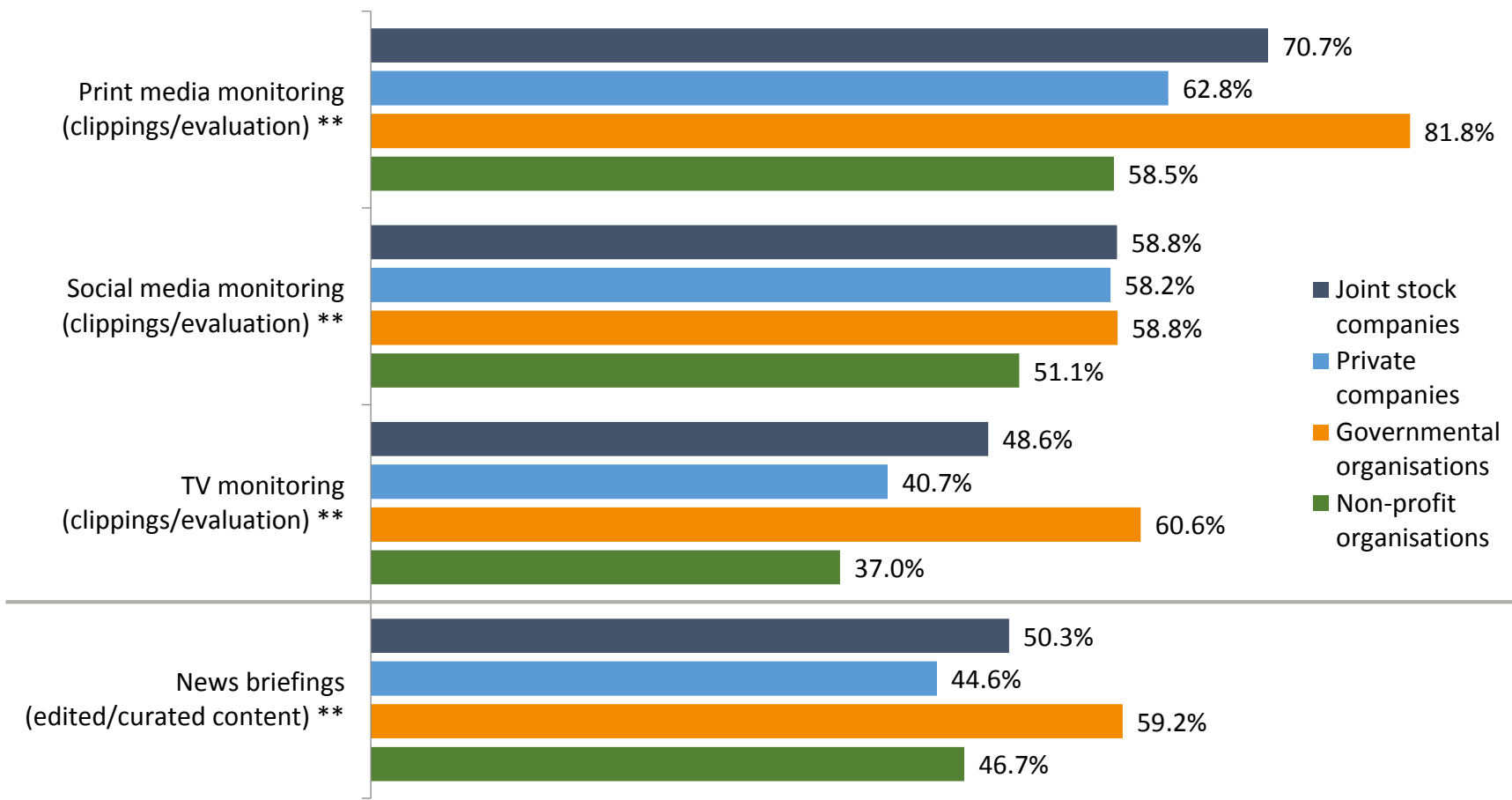
## Supporting all Mobile Devices

**Multimedia, Including TV clips, etc.**



# Communication departments in governmental organisations are ahead in terms of media monitoring and news briefings

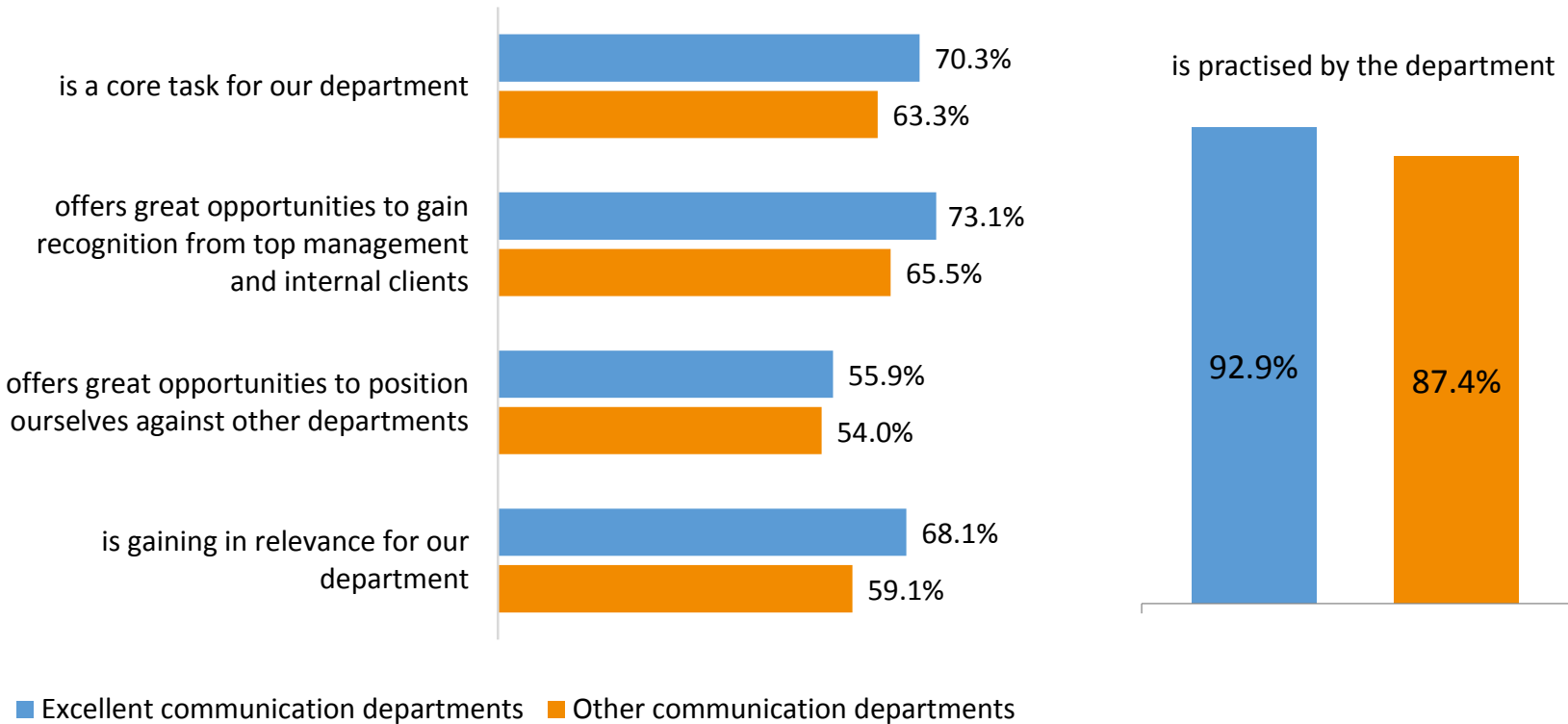
Weekly or daily provision of ...





# Excellent communication departments are delivering value by providing information to top management

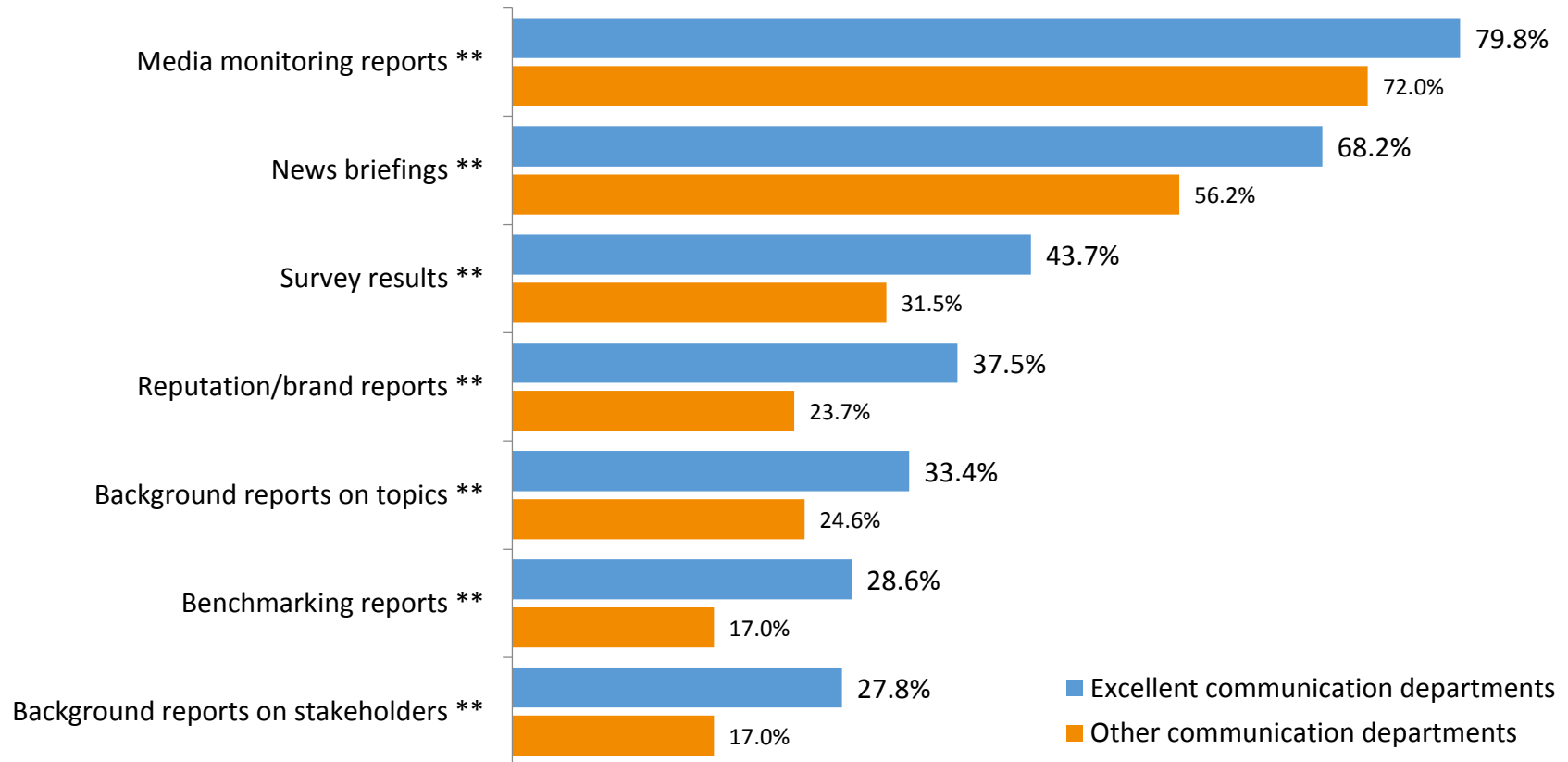
*Providing information for decision-makers ...*



www.communicationmonitor.eu / Zerfass et al. 2018 / n = 2,271 communication professionals in communication departments across Europe. Q 7: Many communication departments provide insights to top management and (internal) clients by delivering information through daily news briefings, media monitoring, survey results, and other reports like scenarios or benchmarks. Please rate the following statements based on your experience. \*\* Highly significant differences (chi-square test,  $p \leq 0.01$ ). Q 8 (n = 2,241): Does your department deliver information like news briefings, media monitoring, survey results, brand/reputation reports, benchmarking or background reports to top management and/or internal clients? Percentages based on “agreement”. \*\* Highly significant differences (chi-square test,  $p \leq 0.01$ ,  $\Phi = 0.065$ ).

## Excellent communication departments offer all kinds of management reports more frequently

*Information frequently provided to top management and/or internal clients*

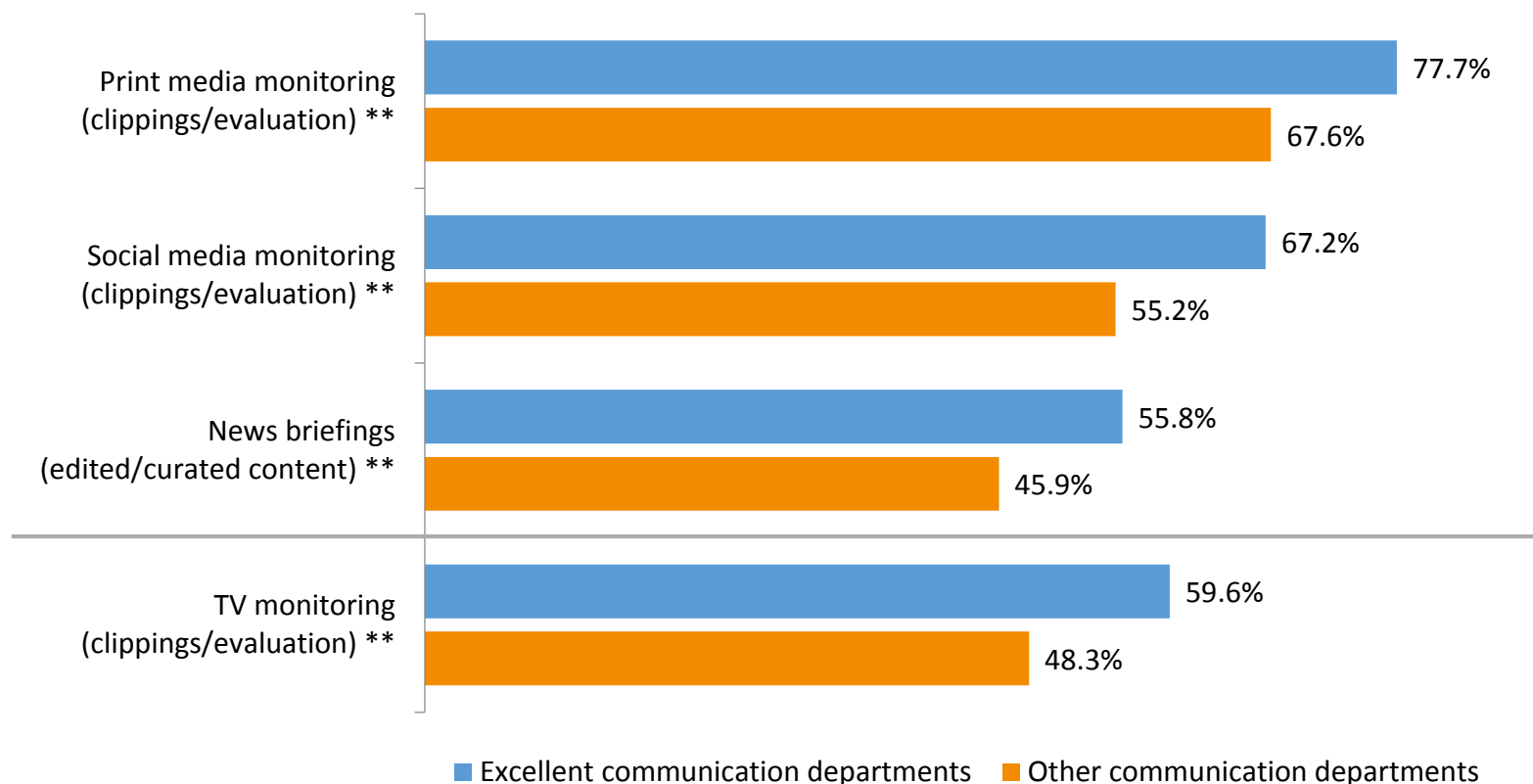


www.communicationmonitor.eu / Zerfass et al. 2018 / n = 1,997 communication professionals in communication departments across Europe. Q 9a: How frequently does your department provide the following information to top management and/or (internal) clients? Percentages based on "regularly".

\*\* Highly significant differences (Kendall rank correlation,  $p \leq 0.01$ ).

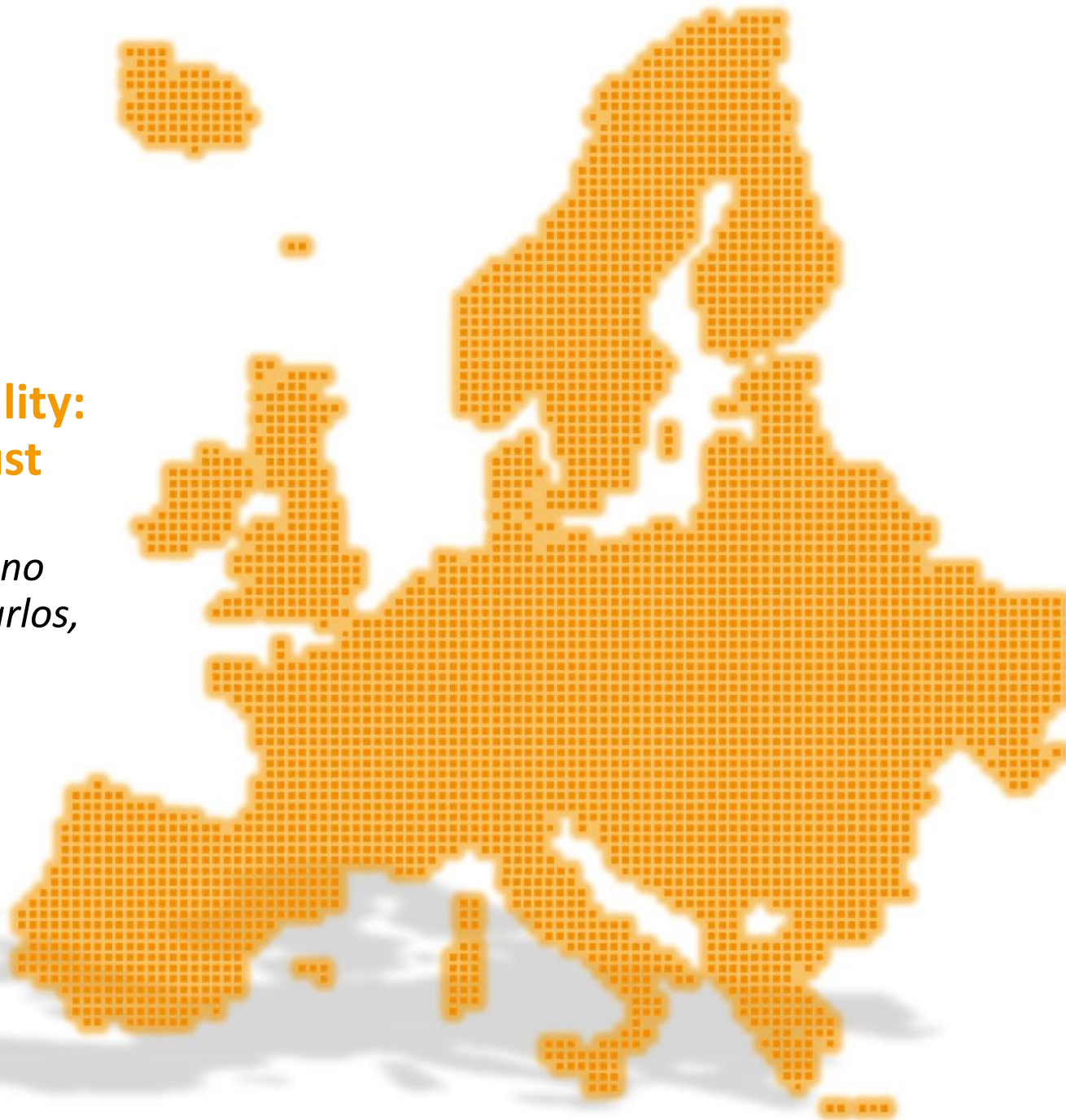
## Excellent communication departments are better at providing up-to-date news briefings and media monitoring to decision-makers

*Weekly or daily provision of ...*



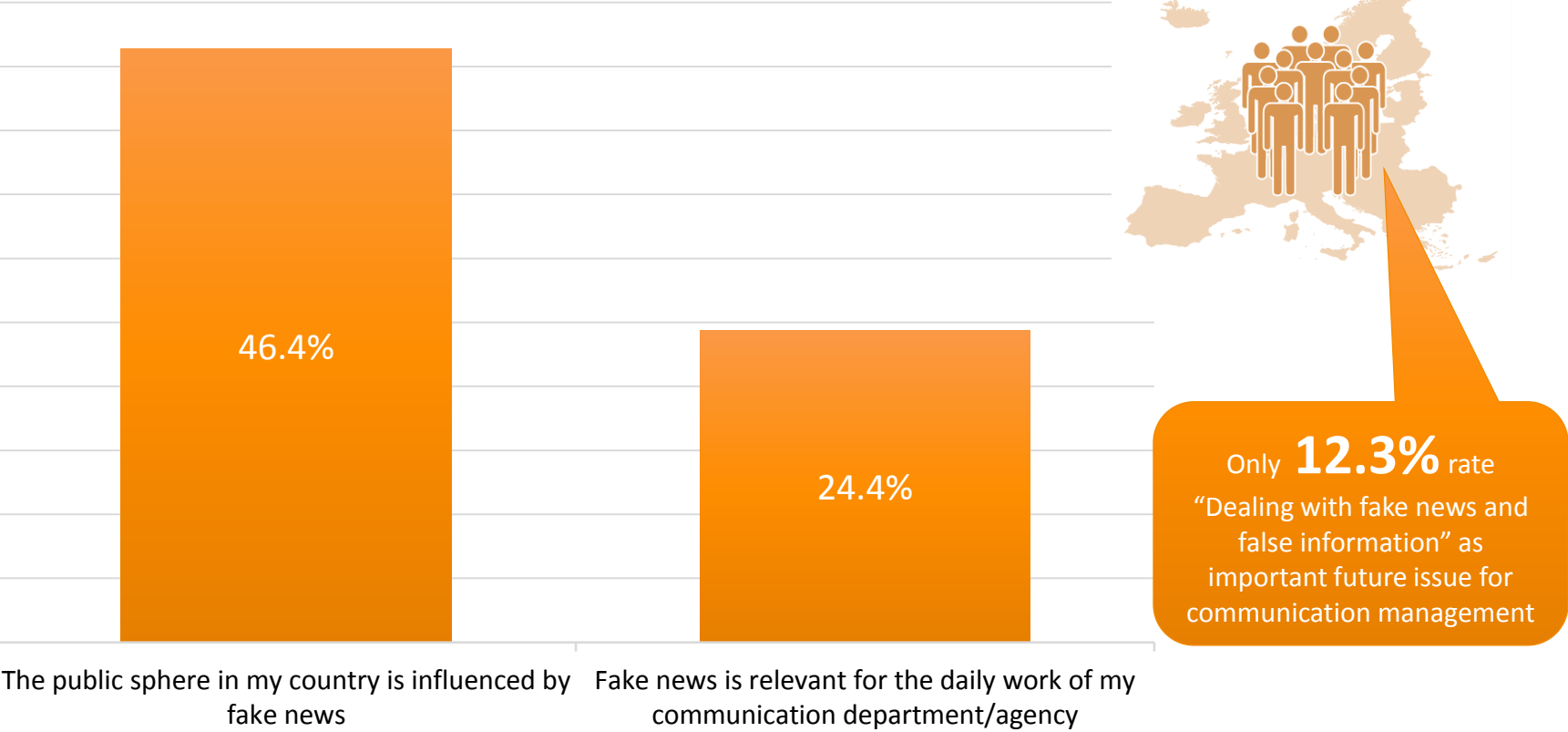
## Responding to reality: Fake news and trust

*Prof. dr. Angeles Moreno  
University Rey Juan Carlos,  
Madrid, Spain*



Even though the public sphere seems to be influenced by fake news, it seems to be less relevant in day to day work in communications

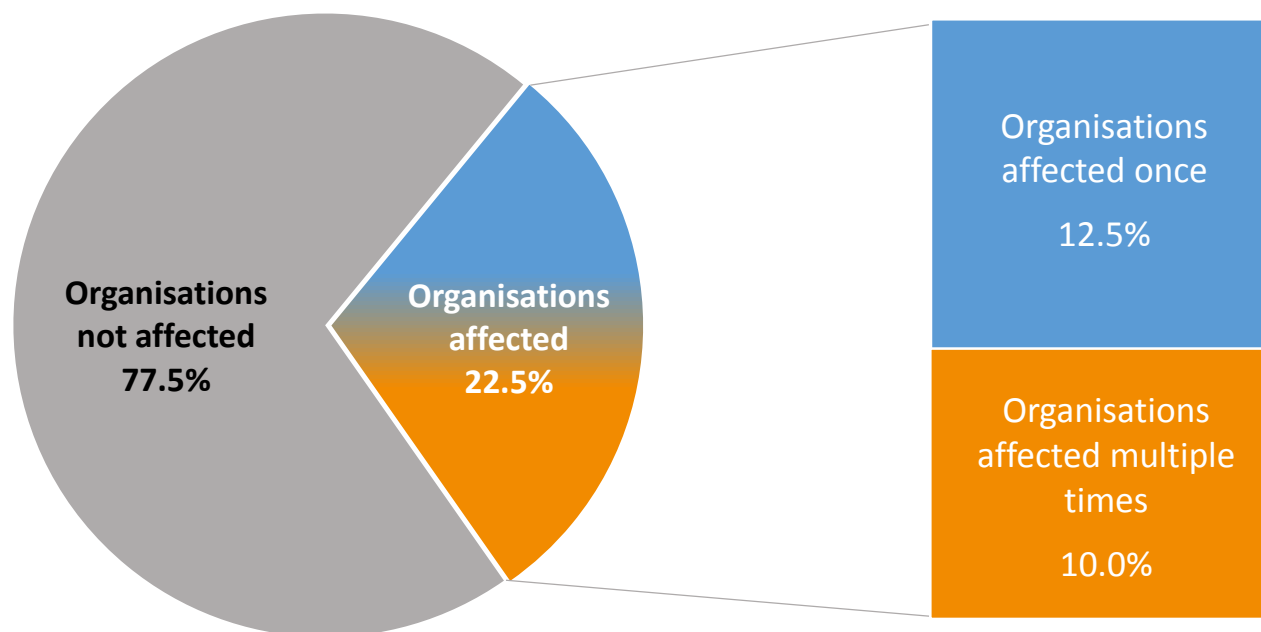
How communication professionals assess fake news



www.communicationmonitor.eu / Zerfass et al. 2018 / n = 3,096 communication professionals. Q 1: Fake news has become a buzzword, especially in the political field (US presidential elections, Brexit debate, etc.), but also related to reports about celebrities, brands and organisations. We define 'fake news' as news in mass or social media that is intentionally and verifiably false or with low facticity, intended to mislead recipients. Please rate these statements based on your experience. Scale 1 (Not at all) – 5 (To a great extent). Percentages: Frequency based on scale points 4-5. Q 6: Which issues will be most important for communication management / PR within the next three years from your point of view? Please pick exactly 3 items. Percentages: Frequency based on selection as Top-3 issue.

## Impact of fake news on organisations: one quarter has already been affected

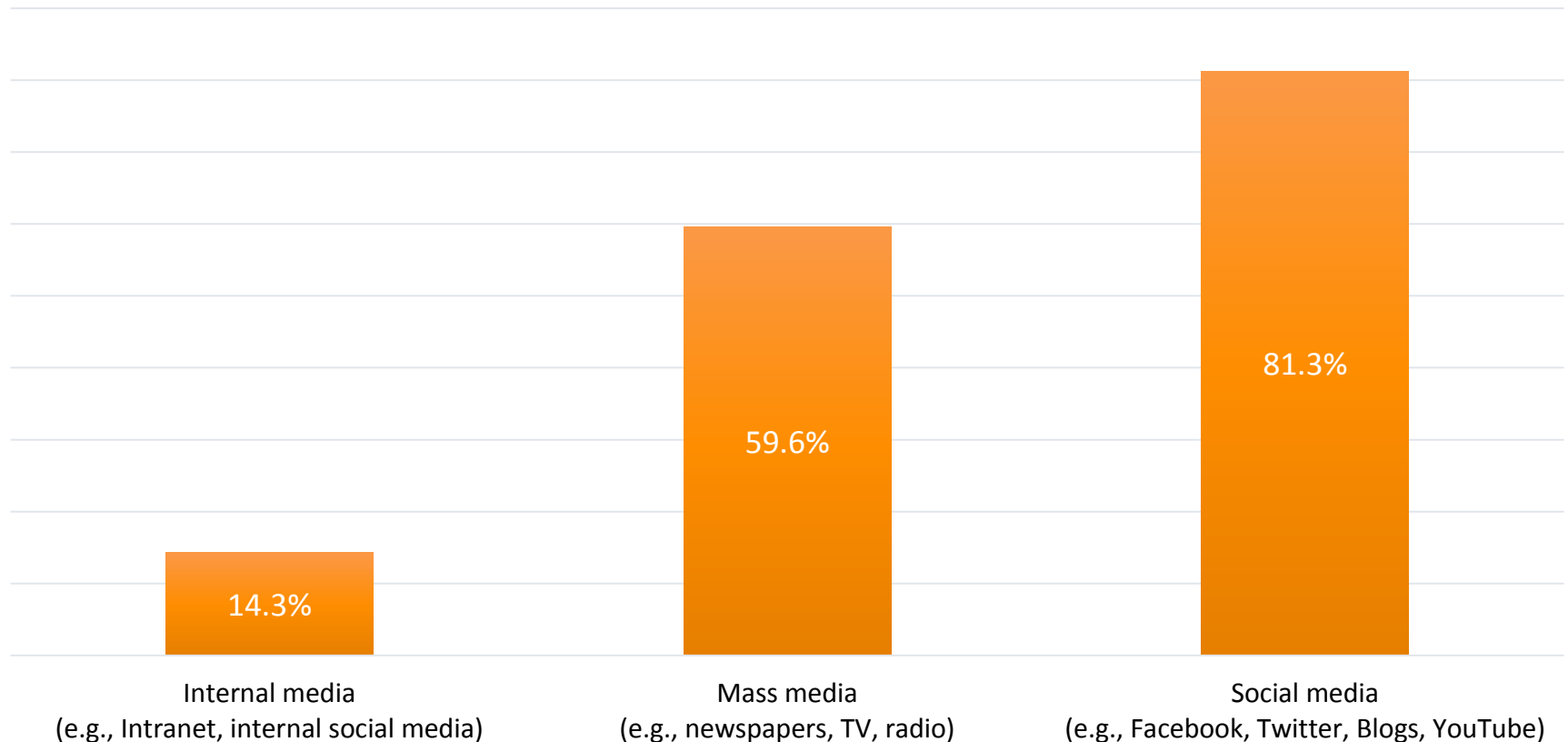
*Has your organisation and its reputation been affected by fake news, and if so, how often in 2017/2018?*





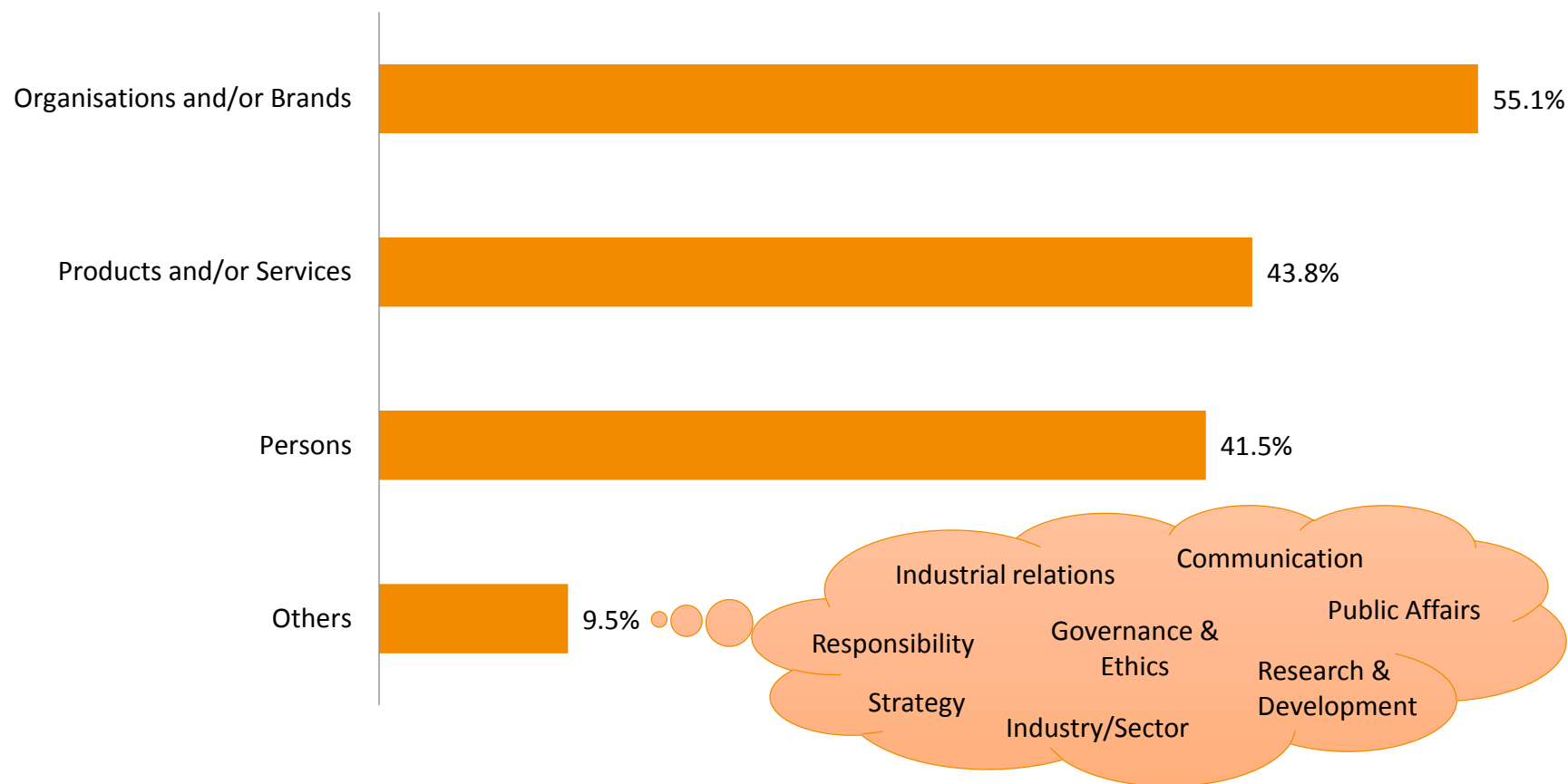
Social media are the main source for fake news – although misleading content is also distributed through mass media and internal communication channels

*Source of fake news that has affected organisations*



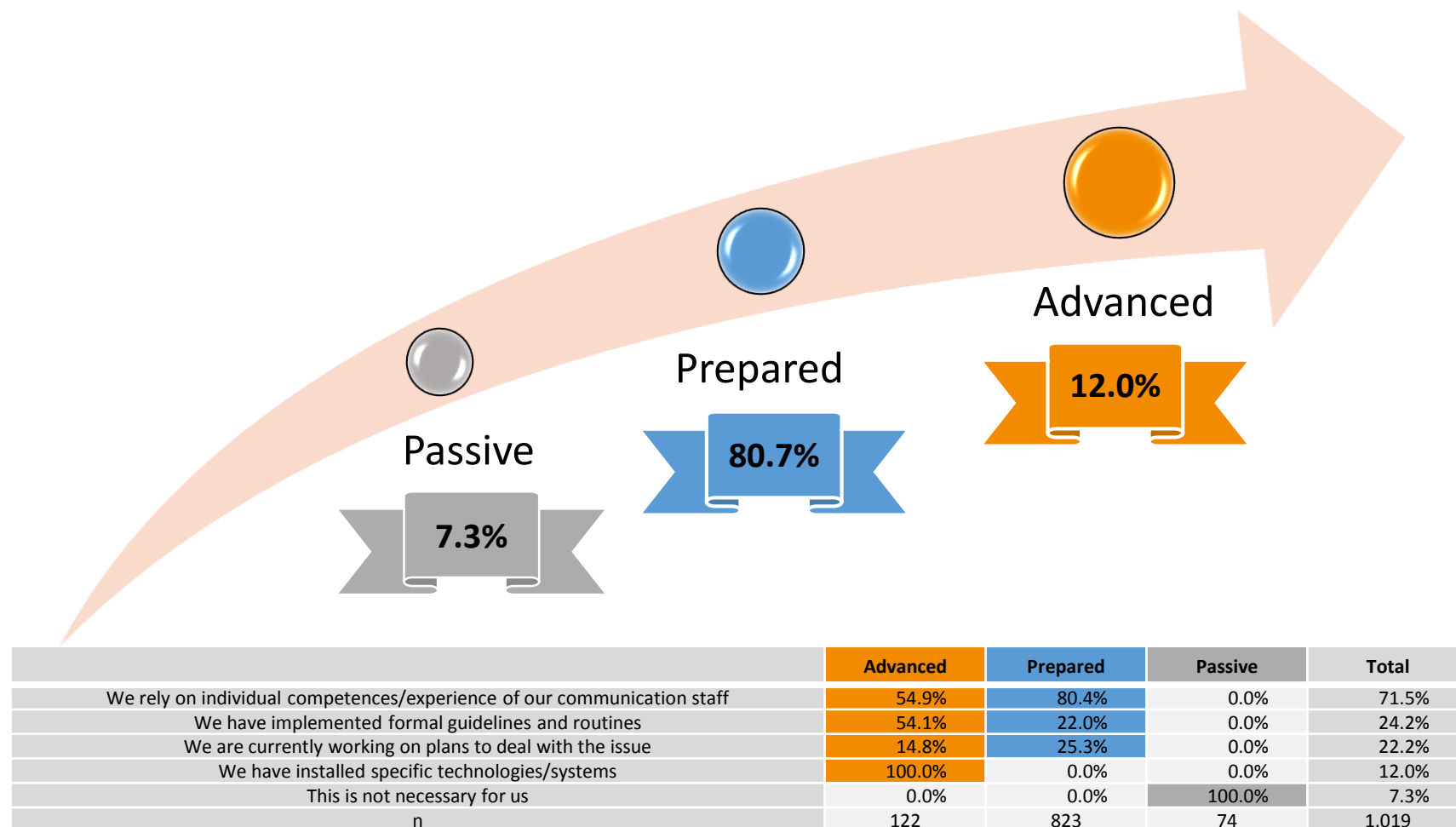
False and misleading news mostly impacts organisations and brands at large – but products, services and people are frequently targeted as well

*Content and focus of fake news that has affected organisations*



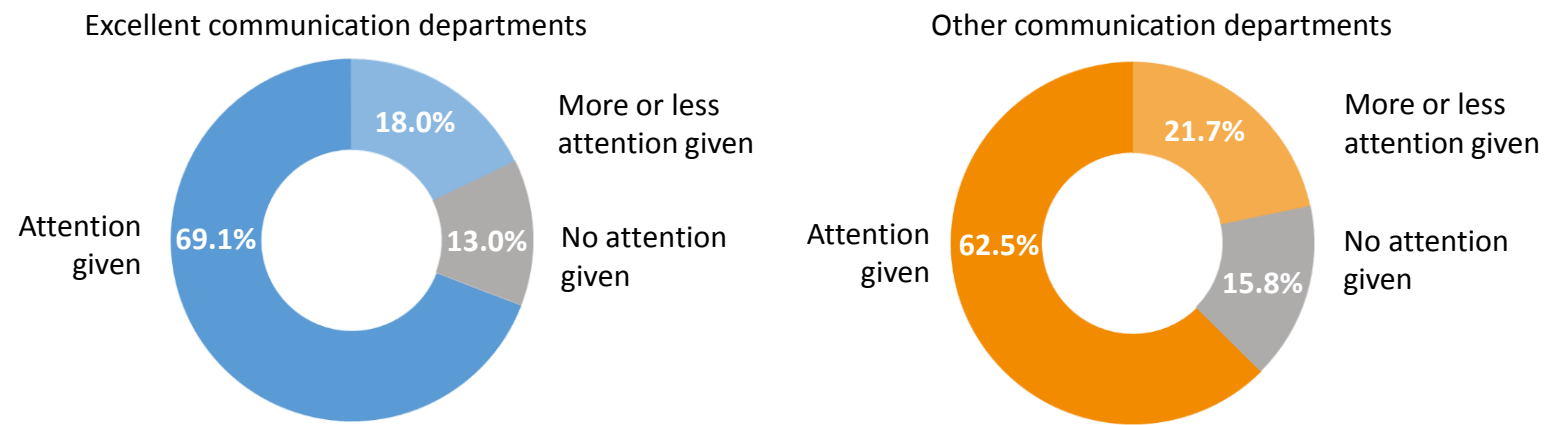
www.communicationmonitor.eu / Zeffass et al. 2018 / n = 813 communication professionals in organisations that were affected by fake news. Q 4: How has your organisation been affected by fake news? Please keep in mind that fake news is commonly understood as 'news in mass or social media that is intentionally and verifiably false or with low facticity, intended to mislead recipients'. What was the fake news about? Multiple answers possible. Qualitative content analysis by two human coders has been applied to analyse open answers in the category "Others".

Cluster analysis reveals three different approaches to identify fake news:  
Only 12 per cent of affected organisations have established advanced routines

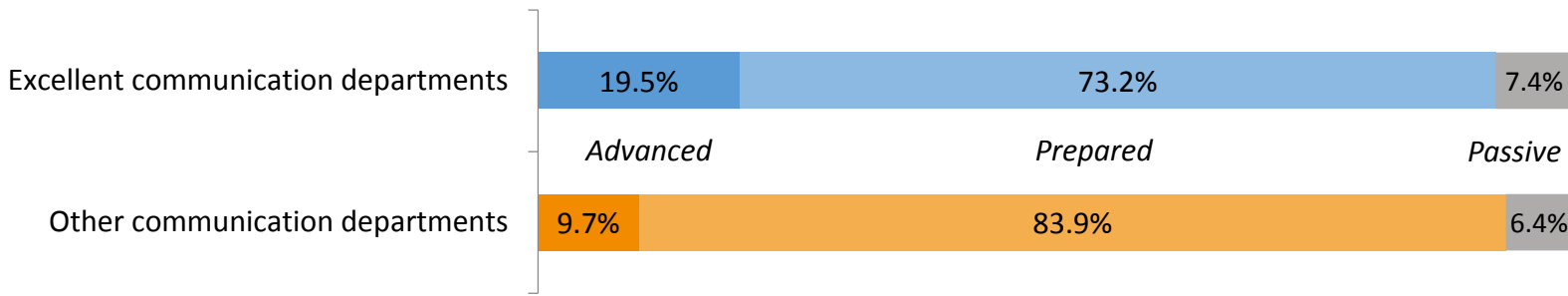


# Excellent departments are better prepared to deal with fake news

## Attention given to the debate about fake news



## Organisational approach to identify fake news



www.communicationmonitor.eu / Zerfass et al. 2018 / n = 868 communication professionals in communication departments across Europe. Q 1: Please rate these statements based on your experience. Item: I have given attention to the debate about fake news. Scale 1 (Not at all) – 5 (To a great extent). Highly significant differences (chi-square test,  $p \leq 0.01$ , Cramér's  $V = 0.077$ ). Q 5: How is your communication department/agency prepared to identify (potential) fake news? Multiple answers possible. Cluster solution based on Q 5 (hierarchical cluster analysis; Z-scores). Highly significant differences (chi-square test,  $p \leq 0.01$ , Cramér's  $V = 0.118$ ).

Questions and discussion



## More information and online benchmarks

Visit our new website [www.communicationmonitor.eu](http://www.communicationmonitor.eu) to assess full reports for all previous European Communication Monitor studies and a large selection of web videos and publications based on this research series. Related surveys are conducted in North America, Latin America and Asia-Pacific – find out more online about the largest and only truly global study of public relations and communication management with sound empirical standards.

Starting in autumn 2018, the web ECM website will feature online benchmarks. You are invited to benchmark yourself and your organisation against comprehensive data from the monitor studies with new topics every three months.

*The book based on a decade of research data and case studies*



### **Communication Excellence:**

*How to Develop, Manage and Lead Exceptional Communications*

by R. Tench, D. Verčič, A. Zeffass, A. Moreno & P. Verhoeven

London: Palgrave Macmillan 2017, 247 pp., ISBN 978-3-319-48859-2

Read this book written for communication leaders interested in a big picture of corporate communications and the future of the field. The authors explore the implications of 10 years of European Communication Monitor data. Combined with case studies and interviews with chief communication officers from top European companies like Santander, DP DHL, Electrolux, Porsche and KMPG, the book provides an insight into how to build, develop and lead excellent communication departments. It shows readers how communication can effectively influence and support the organisation and positively fit within the business strategy of today's global and changing markets.

*"This powerful, practical and highly relevant book is a must read for both communication scholars and practitioners."*

(Donald K. Wright, Ph.D., Harold Burson Professor of Public Relations, Boston University, USA)

*"Straight forward! An insightful read for every communicator who wants to better understand what ,professional' actually means."*

(Nicole Gorfer, Global Head Public & Employee Communications, Roche Group, Basel, Switzerland)





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THANK YOU FOR YOUR ATTENTION AND PARTICIPATION

Prof. dr. Dejan Verčič, Prof. dr. Ángeles Moreno, Dr. Piet Verhoeven  
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