EUROPEAN COMMUNICATION MONITOR 2019

EXPLORING TRUST IN THE PROFESSION, TRANSPARENCY, ARTIFICIAL INTELLIGENCE AND NEW CONTENT STRATEGIES.

RESULTS OF A SURVEY IN 46 COUNTRIES.

ORGANISED BY:

euprera

EACD
EUROPEAN ASSOCIATION OF COMMUNICATION DIRECTORS

PARTNERS:

CISION Insights

Fink & Fuchs

COMMUNICATION DIRECTOR
THE MAGAZINE FOR CORPORATE COMMUNICATIONS AND PUBLIC RELATIONS

EUROPEAN COMMUNICATION MONITOR 2019

EXPLORING TRUST IN THE PROFESSION, TRANSPARENCY, ARTIFICIAL INTELLIGENCE AND NEW CONTENT STRATEGIES. RESULTS OF A SURVEY IN 46 COUNTRIES.

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

A study conducted by the European Public Relations Education and Research Association (EUPRERA) and the European Association of Communication Directors (EACD), supported by partners Cision Insights, Fink & Fuchs and Communication Director magazine.

Imprint

Published by:

EUPRERA European Public Relations Education and Research Association, Brussels, www.euprera.org
EACD European Association of Communication Directors, Brussels, www.eacd-online.eu

Citation of this publication (APA style):

Zerfass, A., Verčič, D., Verhoeven, P., Moreno, A., & Tench, R. (2019).
European Communication Monitor 2019. Exploring trust in the profession, transparency, artificial intelligence and new content strategies. Results of a survey in 46 countries.
Brussels: EUPRERA/EACD, Quadriga Media Berlin.

Short quotation to be used in legends (charts/graphics): *Source: European Communication Monitor 2019.*

This report (chart version) is available as a free PDF document at www.communicationmonitor.eu.
The report is also available as a booklet published by Quadriga Media Berlin, ISBN 978-3-00-062831-3.

Contact:

Please contact national EUPRERA researchers at universities in your country listed on page 128 or lead researcher Prof. Dr. Ansgar Zerfass, zerfass@uni-leipzig.de if your are interested in presentations, workshops, interviews, or further analyses of the insights presented here.

Content

Foreword

This edition of the European Communication Monitor sheds light on five pressing issues for communication leaders: trust, transparency, advocacy, content strategies and emerging technologies. Empirical insights show how societies, organisations and individual practitioners are affected. The study also identifies drivers of excellence in each field, motivating readers to evaluate their own situation and initiate a turnaround where necessary.

The broad range of topics reflects the role of today's communicators. We are asked to oversee everything – all stakeholders, all societal developments – and we have to translate this on behalf of our organisations, our CEOs and colleagues in leadership. We can be change agents, strategic business counsellors, leaders in creating the purpose of organisations and connectors.

To do so, we need to be trusted by top management and leaders of other business units. And we need to be trusted by those with whom we interact in our daily work – journalists, influencers, audiences and many more. The 2019 monitor shows that this is not always the case. According to respondents from 46 European countries, our profession is distrusted by many. Although concrete services by communication departments, agencies and practitioners, however, are much appreciated.

What does this mean? We need to work on our profile as communicators, stay solid, and create value for our organisations. Overpromising and explaining everything through rose-tinted glasses is misleading. For example, transparency is often discussed as a key feature of modern communications. But being transparent is not easy at all. This study shows that a majority of our peers find it fairly or very difficult to communicate about the political stance of leadership teams, internal processes, top-level strategies, and leadership practices. Another example: Artificial Intelligence (AI) is often discussed as a big opportunity for the profession. But we also have to talk about the threats – including missing knowledge, competences and practical experiences in the field; all identified in this study. There is even a reverse "AI divide" between younger and older communicators with those in their twenties perceiving more risks than more seasoned colleagues – a puzzling result that needs to be explored in detail.

The EACD is a vibrant community that provides multiple platforms to discuss such challenges: regional debates across Europe, working groups, and specific programmes for communication leaders and next-generation leaders. We are proud to present this report, a joint project with EUPRERA for more than a decade. I hope that you will profit from the insights.

H Koeleman

Hans Koeleman
President, European Association of Communication Directors

Introduction

Trust in the mass media and journalism is declining in many countries. A recent representative poll of the population in the United Kingdom, Germany and Italy showed that every third person distrusts journalists when they report about organisations. What does this mean for communication and public relations practitioners? Are they still trusted – and by whom? Are there differences between the professional, organisational and individual level, and across countries? And how does this compare to the trust in alternative advocates like top management, marketing and sales people, or other employees?

The European Communication Monitor 2019 explores these issues, as well as a number of other topics relevant for the field. The study shows that impacts and risks of Artificial Intelligence for communications are assessed quite differently, that content creation is mainly inspired by internal sources (but less by external input and discourses), that shared media have clearly gained in importance, and that sponsored social media content is used by every second communication department and agency across Europe.

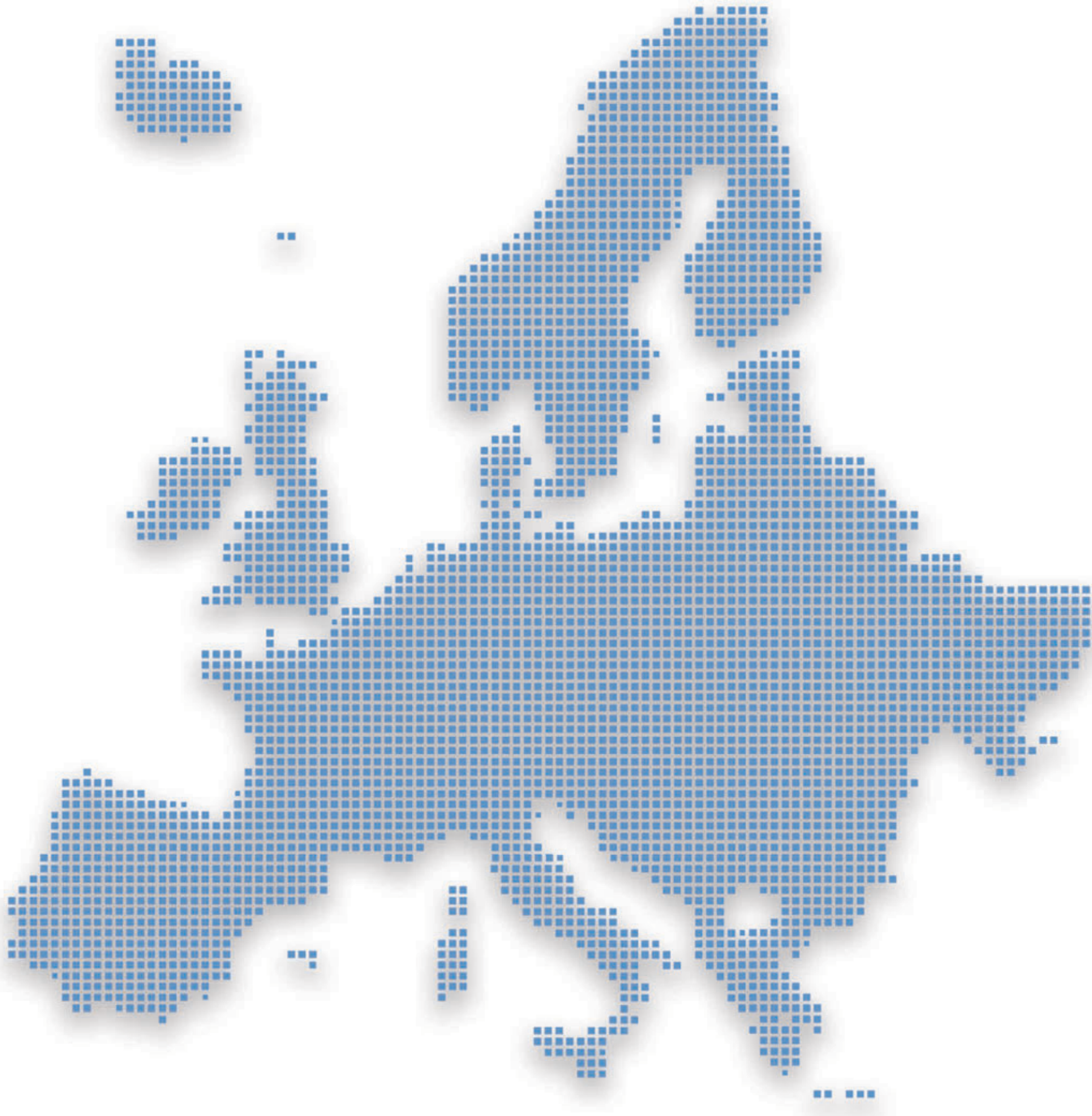
The 13th edition of our annual study is based on responses from 2,689 communication professionals working in companies, non-profits, governmental organisations and agencies from 46 European countries. Detailed analyses are available for 22 countries. This makes the monitor the largest regular study of the field worldwide – and the only truly global research of its kind in conjunction with the North American, Latin American and Asia Pacific Communication Monitors.

On behalf of the research team, I would like to thank all professionals who participated in the survey. Our premium partner Cision Insights, digital communications partner Fink & Fuchs, and national partners BI CCC in Norway and CECOMS in Italy made this extensive research possible. Many thanks to all national collaborators at renowned universities across Europe, to Jens Hagelstein and Ronny Fechner, and to the EACD, namely Angela Howarth from the board of directors.

Prof. Dr. Ansgar Zerfass

Lead researcher; Professor and Chair of Strategic Communication, Leipzig University, Germany & European Public Relations Education and Research Association (EUPRERA)

Research design



Research design

The European Communication Monitor (ECM) 2019 is the 13th edition of a survey that has been conducted annually since 2007. It explores current practices and future developments of strategic communication in companies, non-profits and other organisations including communication agencies across Europe. The study is complemented by other surveys covering five continents and more than 80 countries altogether. The Global Communication Monitor series, initiated and led by Ansgar Zerfass, includes the annual European study and bi-annual studies in North America (Meng et al., 2019), Latin America (Moreno et al., 2015, 2017, 2019) and Asia-Pacific (Macnamara et al., 2015, 2017). The ECM is co-authored by Dejan Verčič, Piet Verhoeven, Ángeles Moreno and Ralph Tench. All of them are renowned university professors representing different national contexts. A wider board of professors and national research collaborators ensure that the survey reflects the diversity of the field across Europe.

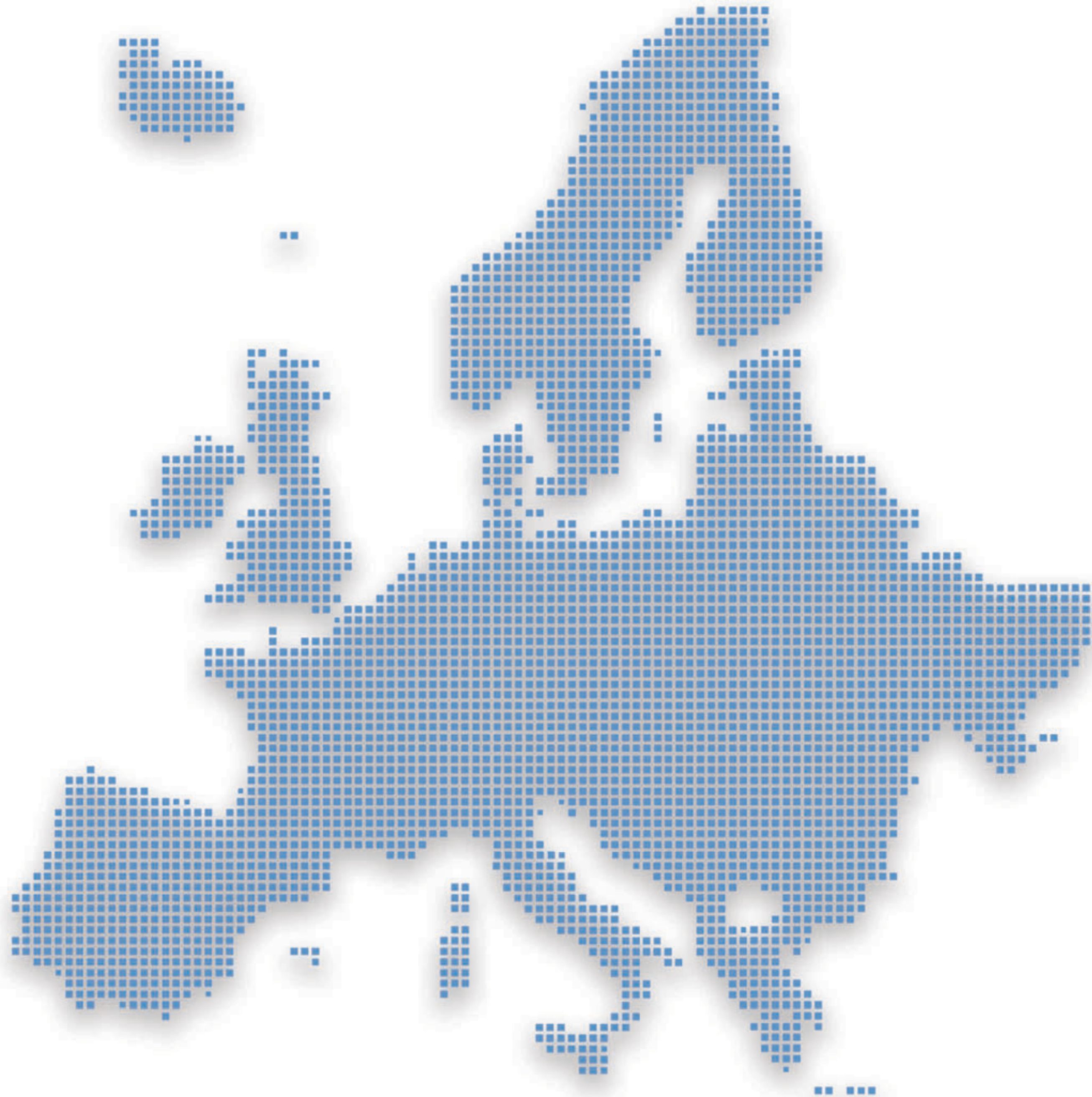
A joint project by academia and practice, the ECM is organised by the European Public Relations Education and Research Association (EUPRERA) and the European Association of Communication Directors (EACD), supported by premium partner Cision Insights, Fink & Fuchs as digital communications partner, and Communication Director magazine as media partner. The Centre for Corporate Communication at BI Norwegian Business School, Oslo, and the Center for Strategic Communication at IULM University, Milan, support the project as national partners.

The ECM 2019 is based on responses from 2,689 communication practitioners from 46 European countries. They have answered a comprehensive questionnaire that collects a variety of independent and dependent variables in a unique research framework (see page 12): personal characteristics of communication professionals (demographics, education, job status, experience); features of the organisation (structure, culture, country); attributes of the communication department; the current situation regarding the professional and his/her organisation, as well as perceptions on developments in the field.

The study is based on theoretical concepts and constructs from the field of strategic communication (Holtzhausen & Zerfass, 2015; Nothhaft et al., 2019). Several research areas have been explored in this edition. Questions are asked about trust in the communications and public relations profession (e.g. Bentele & Seidenglanz, 2004, 2008; Hoffjann & Seidenglanz, 2018; Larsson, 2007), enhancing trust and transparency as an objective for communications (e.g. Anand & Rosen, 2008; Arthur W. Page Society & Business Roundtable Institute for Corporate Ethics, 2007; Boss, 1978; Christensen, 2002; Christensen & Cornelissen, 2015; Okay, 2016; Thakor, 2015); Artificial Intelligence (e.g. Galloway & Swiatek, 2018; Gentsch, 2019; Makridakis, 2017; Poole & Mackworth, 2017; Russel & Norvig, 2016), content creation and distribution (e.g. Brito, 2013; Dietrich, 2018; Edelman & Salsberg, 2010; Pulizzi, 2014), and paid online communication (e.g. Macnamara et al, 2016; Wojdynski & Golan, 2016).

Additionally, several questions from previous ECM surveys have been repeated to track the longitudinal development of the field. The research design combined with the subject themes in this edition supports a broad range of evaluations and interpretations which expand the body of knowledge for the discipline.

Methodology and demographics



Methodology and demographics

The online questionnaire of the European Communication Monitor 2019 consisted of 34 questions arranged in 8 sections. Five of these questions were only presented to professionals working in communication departments, not agencies or consultancies. Instruments used dichotomous, nominal and ordinal response scales and were based on research questions and hypotheses derived from previous research and literature. The survey used the English language and was pre-tested with 67 communication professionals in 20 European countries. Amendments were made where appropriate and the final questionnaire was activated for five weeks in February/March 2019. A large number of professionals throughout Europe were invited with personal e-mails based on a database provided by the European Association of Communication Directors (EACD). Additional invitations were sent via national research collaborators and professional associations.

In total 5,815 respondents started the survey and 2,883 of them completed it. Answers from participants who could not clearly be identified as part of the population were deleted from the dataset. This strict selection of respondents is a distinct feature of the ECM and sets it apart from many studies which are based on snowball sampling or which include students, academics and people outside of the focused profession or region. The evaluation is then based on 2,689 fully completed replies by communication professionals in Europe.

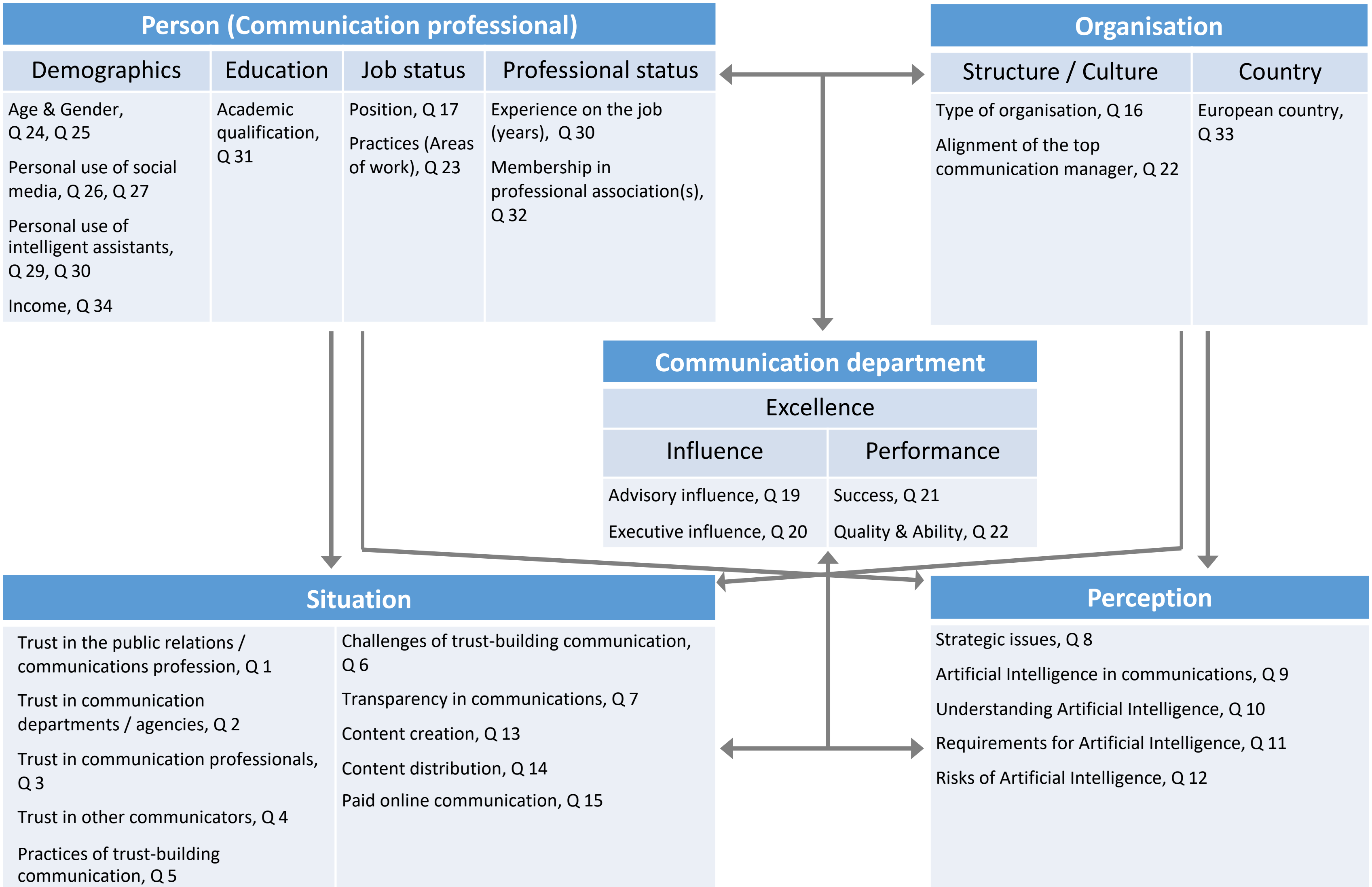
The Statistical Package for the Social Sciences (SPSS) was used for data analysis. Depending on the variable type the results have been tested for statistical significance and (inter-) dependencies (Chi², ANOVA / Scheffé Post-hoc-Test, independent samples T-Test, Pearson correlation and Kendall rank correlation). Statistical indicators (Cramer's V, F, r, Tau) are reported in the footnotes for significant results and marked with asterisks in the figures and tables: * for significant ($p \le 0.05$) and ** for highly significant ($p \le 0.01$) differences.

The demographics show that seven out of ten respondents are communication leaders: 39.3 per cent hold a top hierarchical position as head of communication in an organisation or as chief executive officer of a communication consultancy; 28.3 per cent are unit leaders or in charge of a single discipline in a communication department. 67.8 per cent of the professionals interviewed have more than ten years of experience in communication management. The average age is 42.5 years. This reveals the high quality of the sample. 56.8 per cent of all respondents are female and a vast majority (95.9 per cent) in the sample has an academic degree. More than two thirds hold a graduate degree or even a doctorate.

Seven out of ten respondents work in communication departments in organisations (joint stock companies, 19.9 per cent; private companies, 23.1 per cent; government-owned, public sector, political organisations, 16.6 per cent; non-profit organisations, associations, 10.8 per cent), while 29.6 per cent are communication consultants working freelance or for agencies.

Communication professionals from 46 European countries participated in the survey. Detailed insights were calculated for 22 key markets. Most respondents (31.4 per cent) are based in Southern Europe (countries like Italy, Spain, Serbia, Croatia), followed by Western Europe (29.0 per cent; countries like Germany, Belgium, Netherlands, Switzerland, France), Northern Europe (22.6 per cent; countries like United Kingdom, Sweden, Finland, Norway), and Eastern Europe (16.9 per cent; countries like Poland, Czech Republic, Bulgaria, Romania).

Research framework and questions



Demographic background of participants

Position

Head of Communication, Agency CEO	39.3%
Unit leader, Team leader	28.3%
Team member, Consultant	25.8%
Other	6.5%

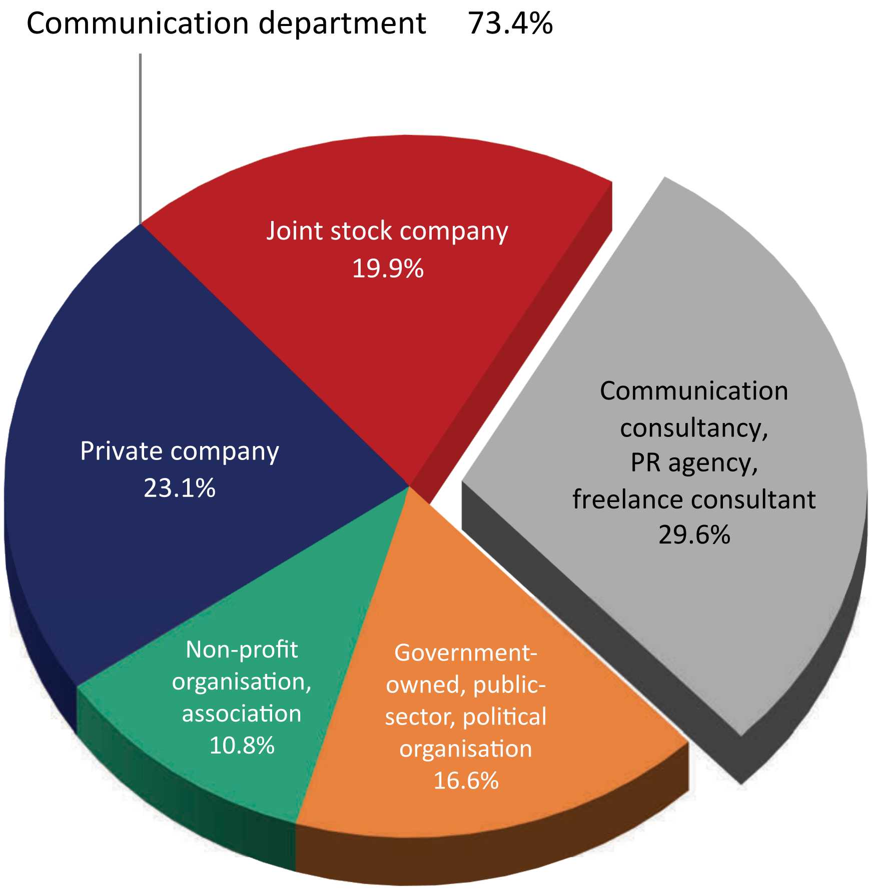
Job experience

More than 10 years	67.8%
6 to 10 years	15.4%
Up to 5 years	17.7%

Alignment of the communication function

Strongly aligned communication department	26.2%
Aligned communication department	60.3%
Weakly aligned communication department	13.5%

Organisation



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals. Q 16: Where do you work? Q 17: What is your position? Q 26: How many years of experience do you have in communication management/PR? Alignment: n = 1,892 communication professionals working in communication departments. Q 18: Within your organisation, the top communication manager or chief communication officer is a member of the executive board / reports directly to the CEO or highest decision-maker on the executive board / does not report directly to the CEO or highest decision-maker.

Personal background of respondents

Gender / Age

	Overall	Head of communication, Agency CEO	Unit leader, Team leader	Team member, Consultant
Female	56.8%	49.8%	55.5%	68.8%
Male	43.2%	50.2%	44.5%	31.2%
Age (on average)	42.7 years	46.7 years	42.2 years	37.3 years

Membership in a professional association

European Association of Communication Directors (EACD)	11.2%
Other international communication association	15.5%
National PR or communication association	48.6%

Highest academic educational qualification

Doctorate (Ph.D., Dr.)	8.2%
Master (M.A., M.Sc., Mag., M.B.A.), Diploma	63.2%
Bachelor (B.A., B.Sc.)	24.4%
No academic degree	4.1%

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals. Q 17: What is your position? Q 24: How old are you? Q 25: What is your gender? Q 31: Please state the highest academic/educational qualification you hold. Q 32: Are you a member of a professional organisation?

Countries and regions represented in the study

Respondents are based in 46 European countries and four regions

Western Europe
29.0% (n = 781)

Austria, Belgium, France, Germany, Liechtenstein, Luxembourg, Netherlands, Switzerland

Northern Europe
22.6% (n = 609)

Denmark, Estonia, Finland, Iceland, Ireland, Latvia, Lithuania, Norway, Sweden, United Kingdom

Southern Europe
31.4% (n = 845)

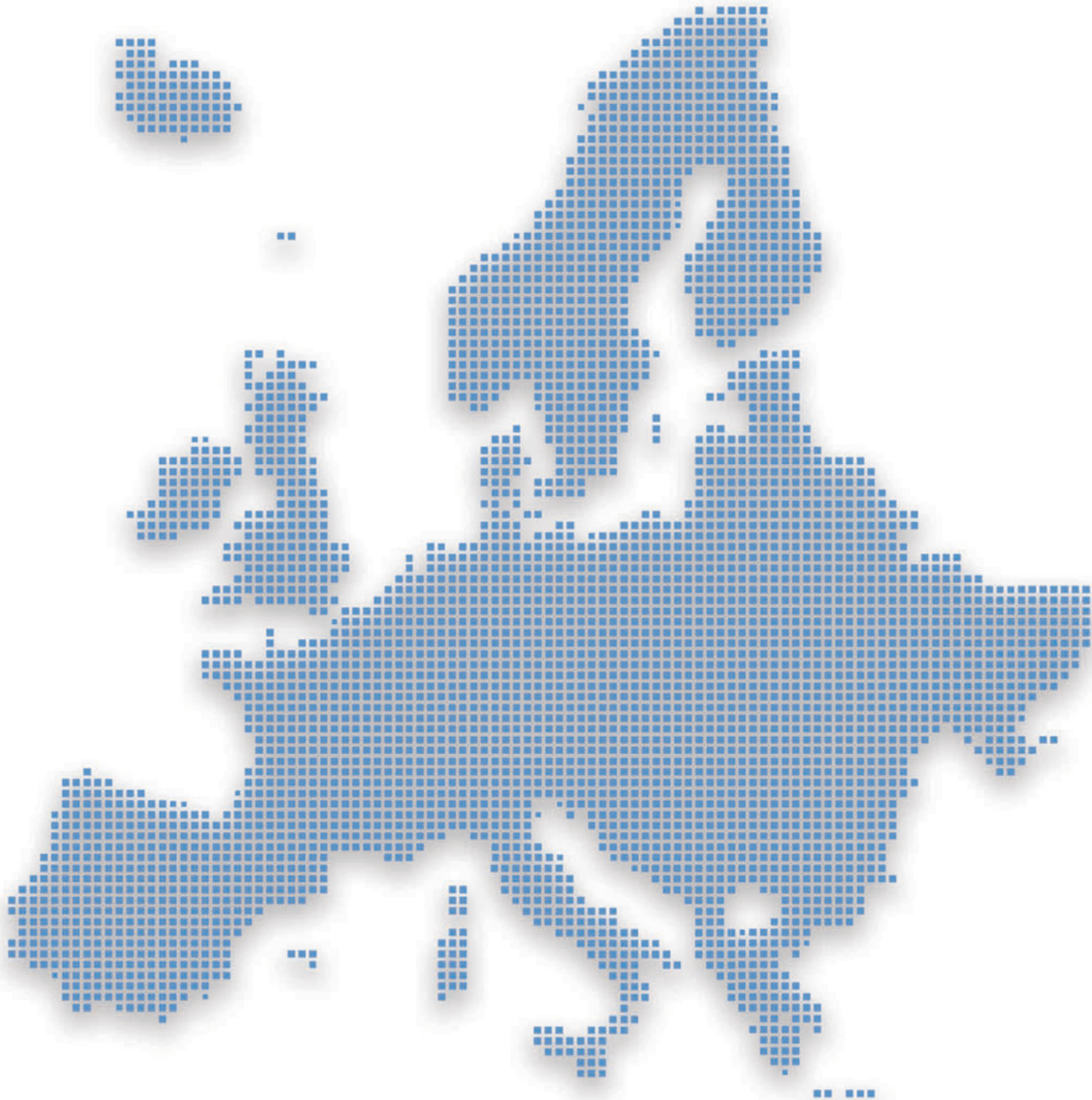
Albania, Andorra, Bosnia and Herzegovina, Croatia, Cyprus, Greece, Italy, Kosovo, Macedonia, Malta, Montenegro, Portugal, Serbia, Slovenia, Spain, Turkey

Eastern Europe
16.9% (n = 454)

Armenia, Belarus, Bulgaria, Czech Republic, Georgia, Hungary, Moldova, Poland, Romania, Russia, Slovakia, Ukraine

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals. Q 33: 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 (2019) and the Columbia Encyclopedia (2018).

Trust in the communication profession



Chapter overview

In many countries, trust in the mass media and journalism is declining. According to the latest Eurobarometer from November 2018, 39 per cent of the citizens in the European Union show little or no confidence in the media, while only one in five (19 per cent) has high confidence (Commission européenne, 2018, pp. 40-43). Both values were lower than in previous surveys.

This loss of trust might also be true for other communicators, especially those who communicate on behalf of companies and other types of organisations. This is a key challenge for the profession, as communicators need to be trusted by the people they work for, e.g. top executives and (internal) clients (Bentele & Seidenglanz, 2004; Hoffjann & Seidenglanz, 2018; Larsson, 2007). But they are also dependent on the trust of journalists, bloggers, influencers, and publics with whom they interact to reach their goals. High trust levels are important to work effectively, as high-trust groups outperform low-trust groups (Boss, 1978; Golembiewski & McConkie, 1975; Zand, 1972).

Trust in communications and public relations (PR) can be investigated from a macro, meso and micro perspective: trust in the profession, in communication departments or agencies, and in individual practitioners. Previous research indicates that trust differs between different levels and stakeholders. Journalists, for example, are very critical towards the PR profession in general. Working closely together however has a positive effect: journalists that have worked closely with PR professionals evaluate the profession better than those who have not done so (Jeffers, 1977; Ryan & Martinson, 1988; Sallot & Johnson, 2006). The general population, on the other hand, is generally less critical towards the PR profession than journalists (Bentele & Seidenglanz, 2004).

The ECM 2019 is the first study that has explored the topic comprehensively across different levels, stakeholders and countries. The findings first of all demonstrate that practitioners experience low trustworthiness in the profession. They state that the communications profession is only trusted by two thirds of top executives (67.5 per cent think so), and by a minority of influencers and bloggers (47.5 per cent), journalists (39.1 per cent) and ordinary people (27.6 per cent). Generally speaking the perception of trust levels in the profession is higher in Northern and Western Europe than in Southern and Eastern Europe.

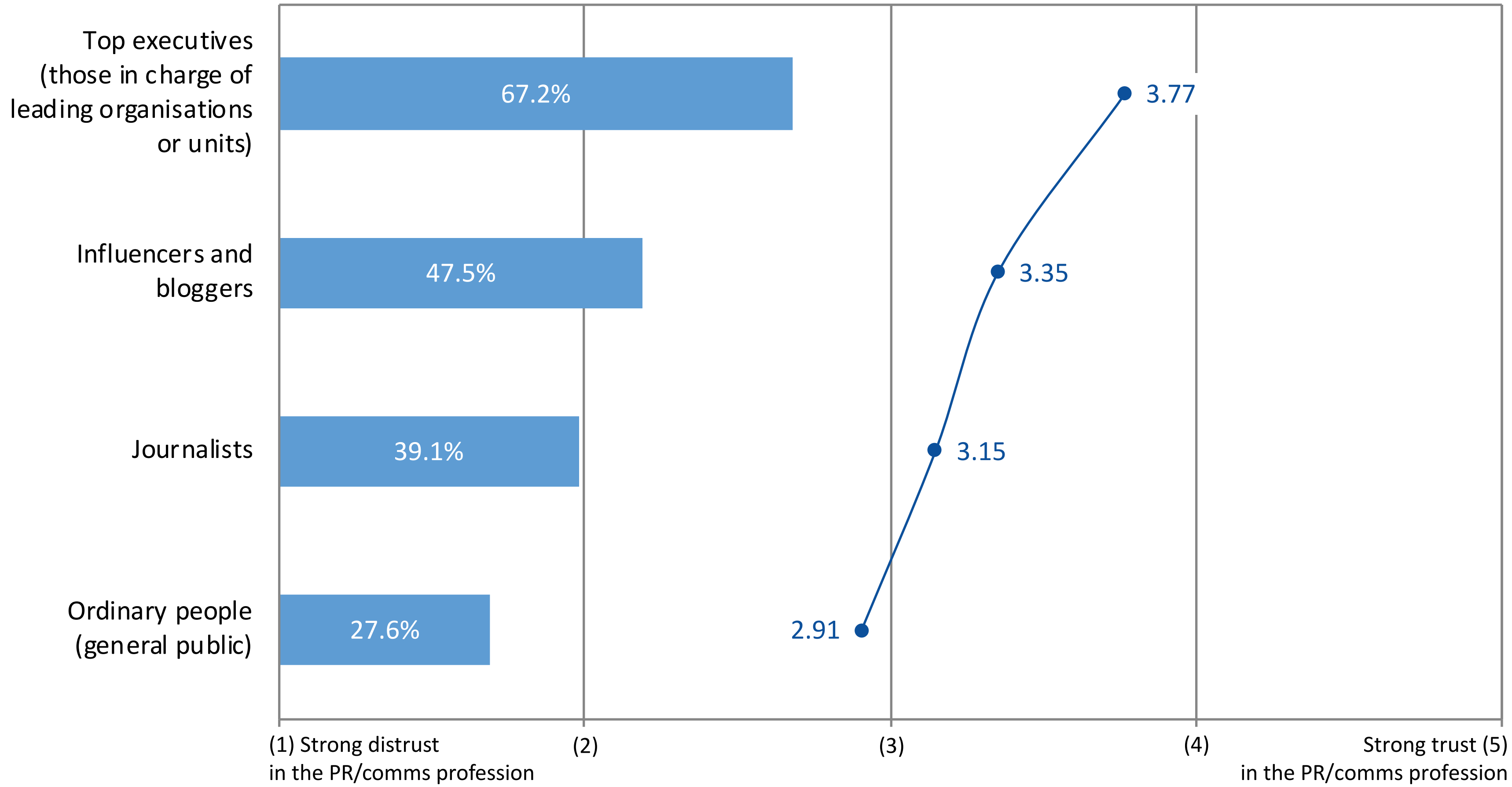
Professionals are more positive about the perceived trust in their departments or agencies. 85.1 per cent of the respondents report a positive attitude by executives in their own organisation or by clients, followed by 73.9 per cent perceived trust from journalists, 70.1 per cent from publics and 68.4 per cent from influencers and bloggers. Interestingly, trust in communication departments is experienced significantly lower in government-owned, public sector and political organisations.

Professionals are the most positive about the perceived trust they enjoy personally. A vast majority feels trusted by their colleagues, bosses, and internal clients, as well as by external stakeholders and audiences. On the personal level hierarchy matters: communication leaders feel more trusted than professionals in other ranks. The data also reveals some gender differences: women report more trusted relationships with external stakeholders, but men claim to be on better terms with top leaders of their organisation.

To conclude the empirical results show that trust is an issue for strategic communication. Practitioners experience most trust on the micro level and least trust on the macro level. They feel most trusted by top executives and much less by the general public.

Trust in the communications / public relations profession (Macro level): Practitioners experience low trustworthiness from their stakeholders

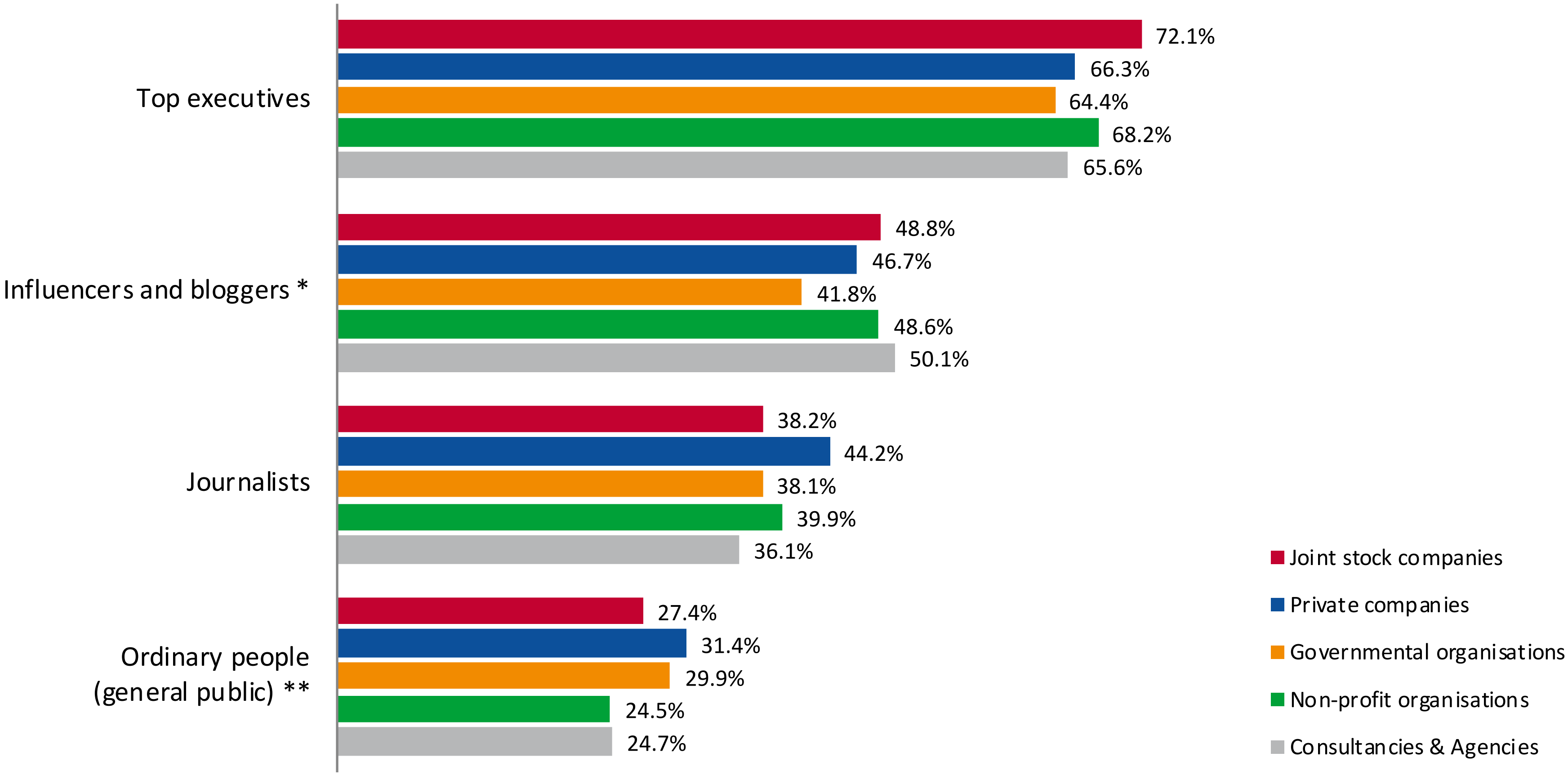
Perceived trust in the public relations/communications profession by …



www.communicationmonitor.eu / Zerfass et al. 2019 / n ≥ 2,505 communication professionals. Q 1: In many European countries, trust in the mass media and journalism is declining. This might be true for other communicators as well – those who communicate on behalf of companies, non-profits, governments, political parties, etc. Based on your experience, how much do the following groups trust the public relations/communications profession in your country? Scale 1 (Strong distrust in the PR/comms profession) – 5 (Strong trust in the PR/comms profession). Percentages: Frequency based on scale points 4-5. Mean values.

Practitioners working in private companies and governmental organisations report a higher level of trust towards the profession by the general public

Perceived trust in the public relations/communications profession by …



www.communicationmonitor.eu / Zerfass et al. 2019 / n ≥ 2,505 communication professionals. Q 1: In many European countries, trust in the mass media and journalism is declining. This might be true for other communicators as well – those who communicate on behalf of companies, non-profits, governments, political parties, etc. Based on your experience, how much do the following groups trust the public relations/communications profession in your country? Scale 1 (Strong distrust in the PR/comms profession) – 5 (Strong trust in the PR/comms profession). Percentages: Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, p ≤ 0.01). * Significant differences (chi-square test, p ≤ 0.05).

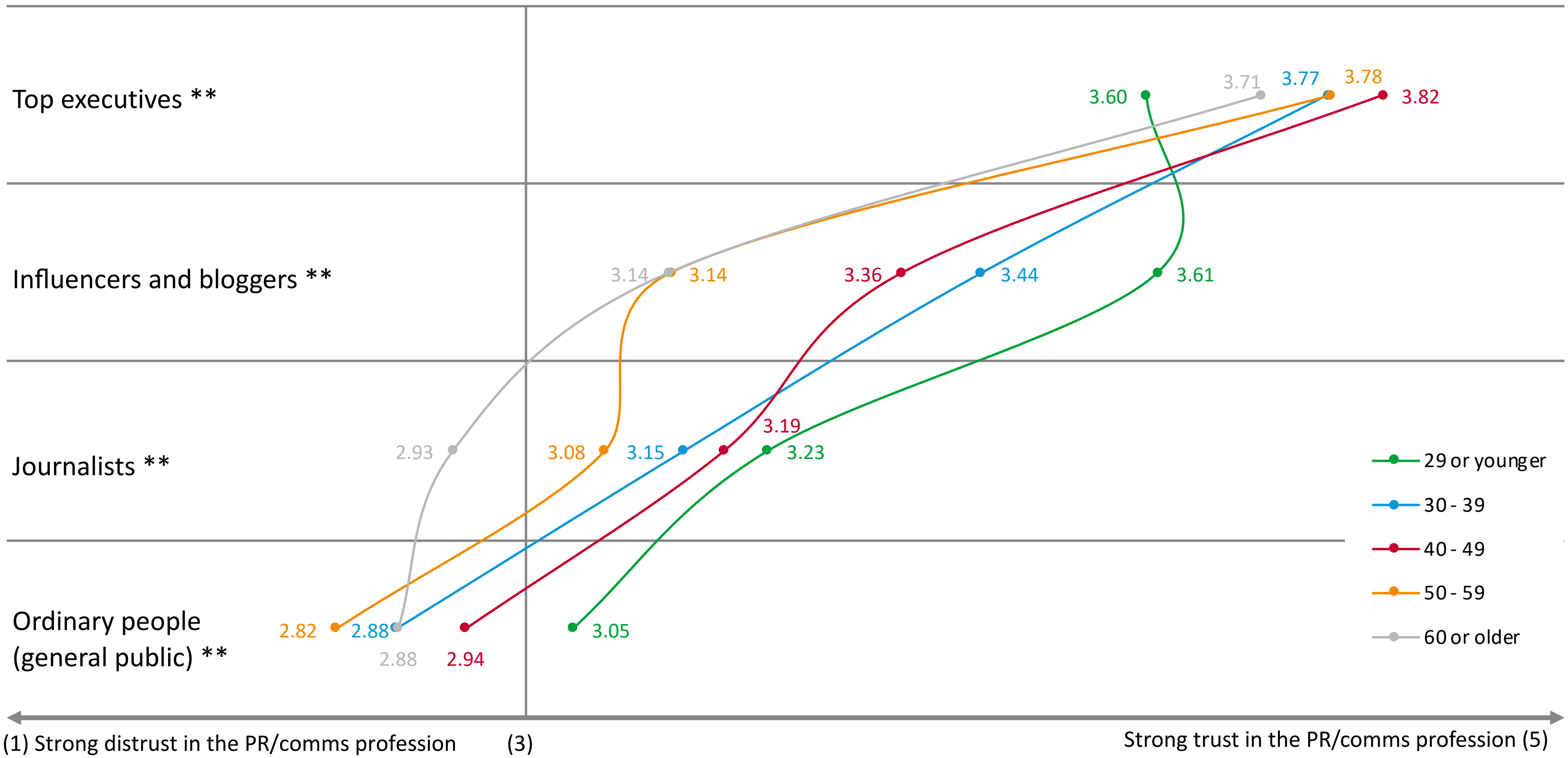
Trust in the communication profession by different stakeholders across Europe

	Top executives	Influencers and bloggers	Journalists	Ordinary people (general public)		Top executives	Influencers and bloggers	Journalists	Ordinary people (general public)
Germany	74.2%	38.3%	40.1%	17.2%	Spain	65.1%	49.6%	53.1%	30.6%
Austria	62.0%	39.7%	42.2%	33.3%	Portugal	60.5%	65.3%	37.5%	36.8%
Switzerland	77.4%	37.8%	43.8%	30.8%	Italy	66.1%	53.4%	44.2%	24.7%
France	70.8%	38.5%	40.9%	17.5%	Slovenia	61.1%	42.4%	31.9%	28.9%
Belgium	65.3%	44.5%	43.1%	26.6%	Croatia	54.5%	53.7%	25.4%	24.1%
Netherlands	76.9%	41.6%	37.9%	27.9%	Serbia	55.2%	52.7%	30.2%	35.3%
United Kingdom	71.1%	41.8%	36.1%	14.3%	Turkey	52.3%	44.1%	29.9%	28.4%
Ireland	73.1%	52.9%	48.1%	15.7%	Poland	58.9%	36.5%	20.0%	29.6%
Sweden	75.0%	53.6%	31.1%	31.0%	Czech Republic	66.0%	52.3%	41.3%	27.7%
Norway	85.4%	50.7%	30.1%	26.8%	Romania	59.9%	57.6%	44.2%	35.1%
Finland	78.7%	59.1%	53.1%	41.9%	Bulgaria	51.0%	40.8%	36.7%	25.5%

www.communicationmonitor.eu / Zerfass et al. 2019 / n ≥ 2,252 communication professionals from 22 countries. Q 1: In many European countries, trust in the mass media and journalism is declining. This might be true for other communicators as well – those who communicate on behalf of companies, non-profits, governments, political parties, etc. Based on your experience, how much do the following groups trust the public relations/communications profession in your country? Scale 1 (Strong distrust in the PR/comms profession) – 5 (Strong trust in the PR/comms profession). Percentages: Frequency based on scale points 4-5.

Young professionals experience stronger trust by influencers, bloggers, journalists and the general population than their elder peers

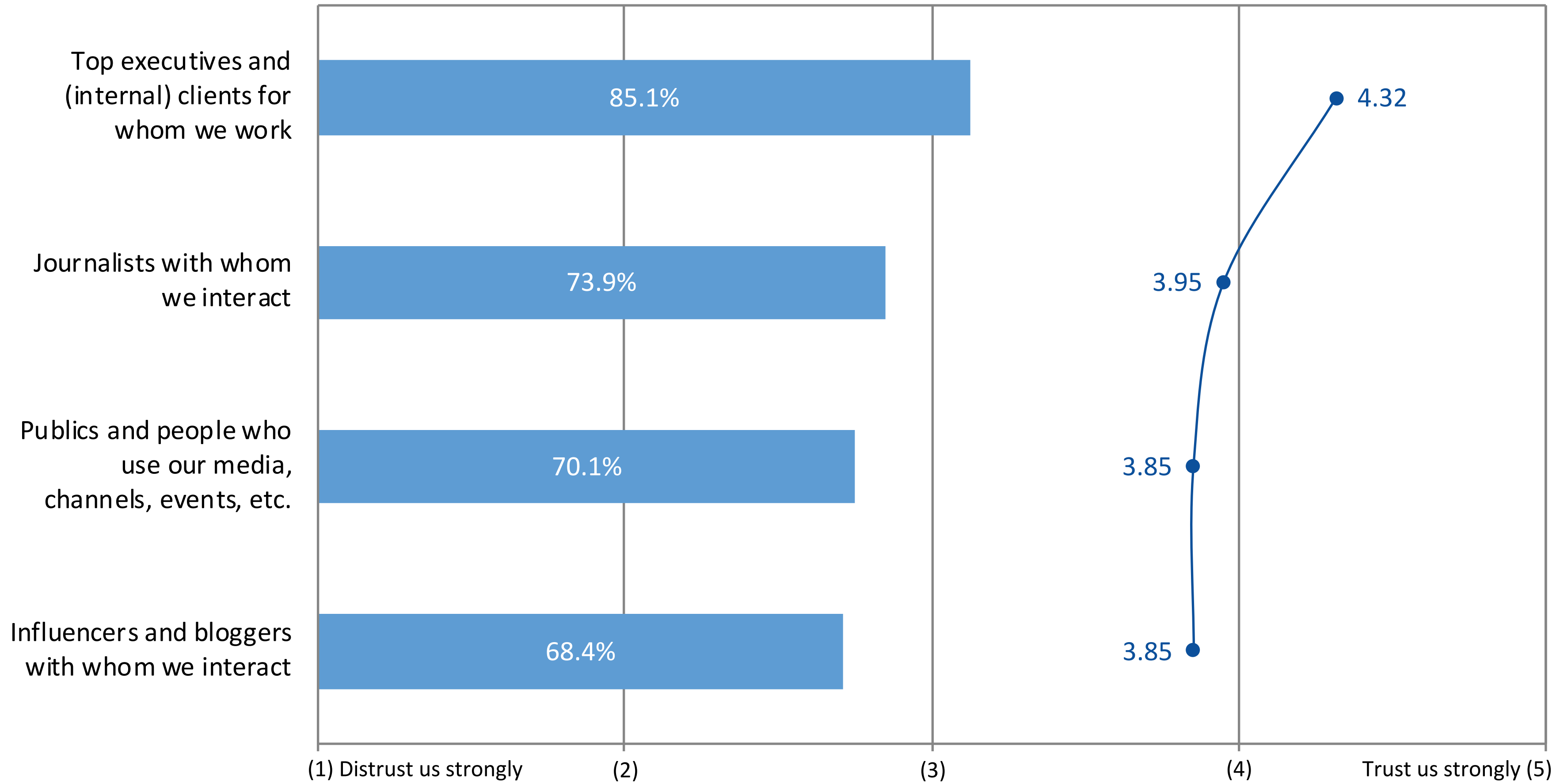
Perceived trust in the public relations/communications profession by …



www.communicationmonitor.eu / Zerfass et al. 2019 / n ≥ 2,505 communication professionals. Q 1: In many European countries, trust in the mass media and journalism is declining. This might be true for other communicators as well – those who communicate on behalf of companies, non-profits, governments, political parties, etc. Based on your experience, how much do the following groups trust the public relations/communications profession in your country? Scale 1 (Strong distrust in the PR/comms profession) – 5 (Strong trust in the PR/comms profession). Mean values. ** Highly significant differences (Kendall rank correlation, p ≤ 0.01).

Trust in communication departments and agencies (Meso level): Most practitioners report a positive attitude by internal and external stakeholders

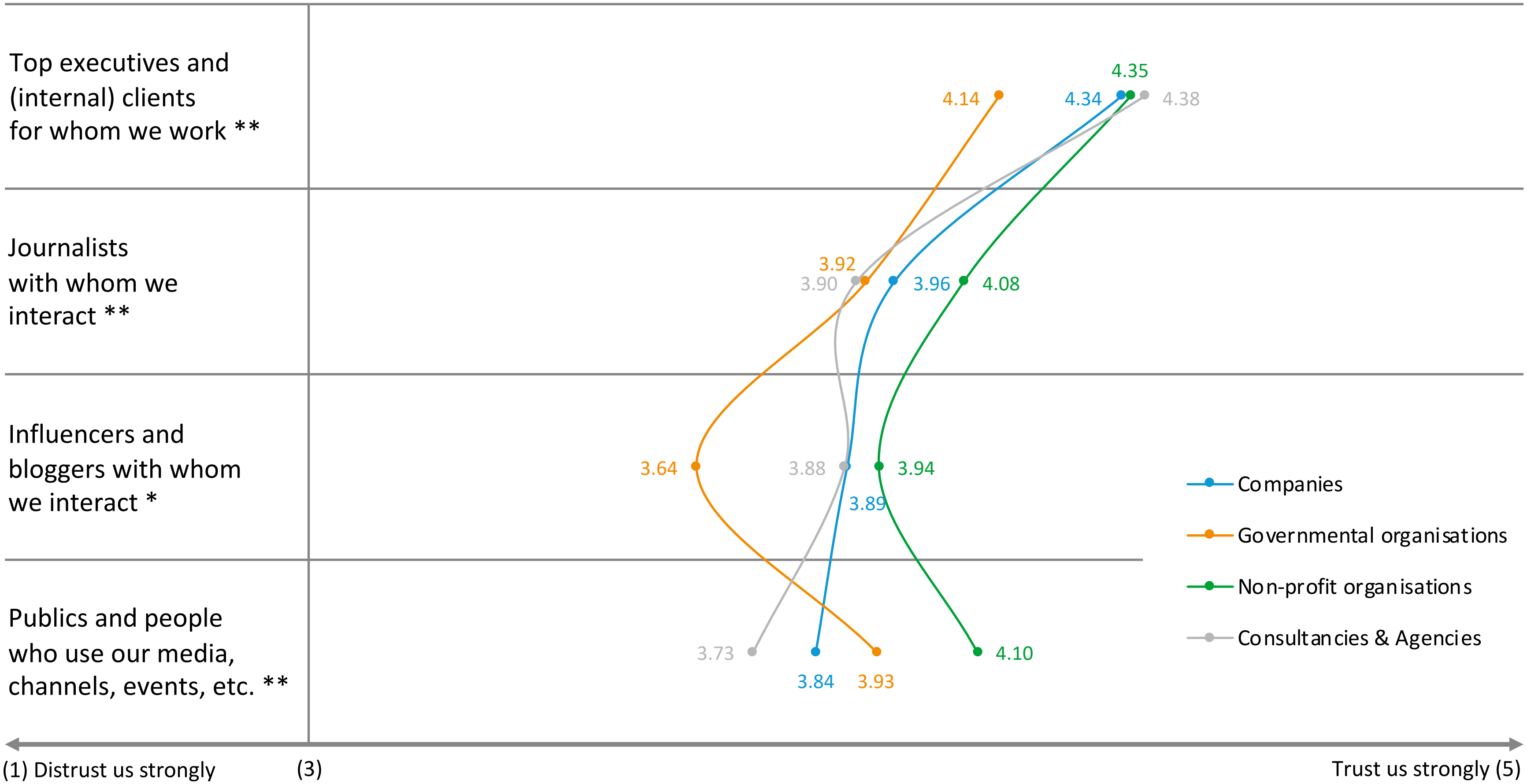
Perceived trust in the communication department/agency by …



www.communicationmonitor.eu / Zerfass et al. 2019 / n ≥ 2,186 communication professionals. Q 2: Let's get more specific and focus on your organisation. How do you feel about the attitude towards your communication department/agency by those who interact with you? Scale 1 (Distrust us strongly) – 5 (Trust us strongly). Percentages: Frequency based on scale points 4-5. Mean values.

Communication departments in governmental organisations experience a significantly lower level of trust internally and by bloggers/influencers

Perceived trust in the communication department/agency by …



www.communicationmonitor.eu / Zerfass et al. 2019 / n ≥ 2,168 communication professionals. Q 2: Let's get more specific and focus on your organisation. How do you feel about the attitude towards your communication department/agency by those who interact with you? Scale 1 (Distrust us strongly) – 5 (Trust us strongly). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01). * Significant differences (ANOVA, p ≤ 0.05).

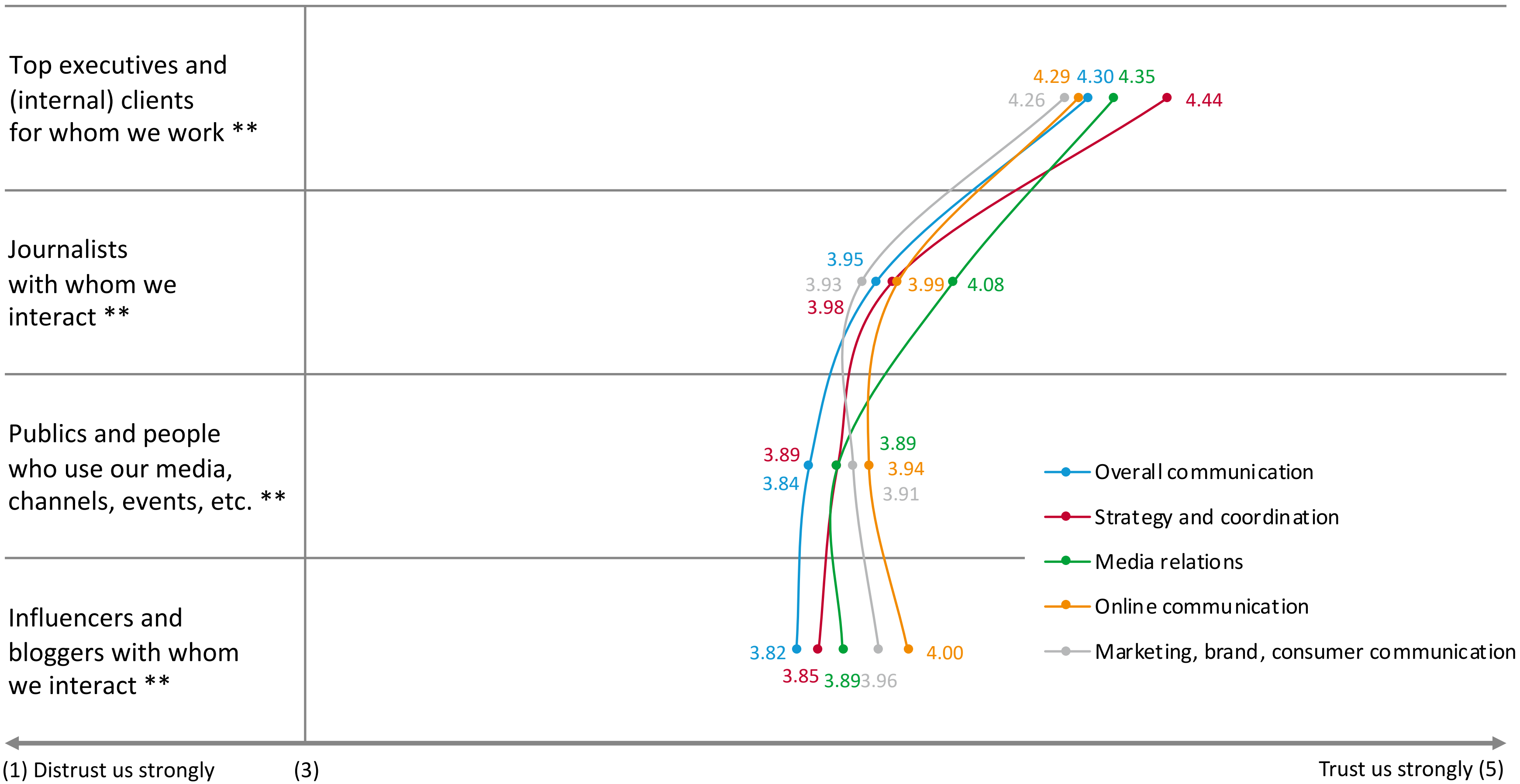
Trust in communication departments and agencies by different stakeholders

	Top executives and (internal) clients for whom we work	Journalists with whom we Interact	Publics and people who use our media, channels, events, etc.	Influencers and bloggers with whom we interact		Top executives and (internal) clients for whom we work	Journalists with whom we Interact	Publics and people who use our media, channels, events, etc.	Influencers and bloggers with whom we interact
Germany	88.0%	77.2%	66.9%	61.3%	Spain	84.7%	79.7%	68.2%	63.4%
Austria	88.1%	86.3%	76.9%	72.5%	Portugal	83.5%	69.7%	67.5%	70.6%
Switzerland	90.7%	72.6%	79.8%	62.0%	Italy	77.8%	72.4%	66.9%	74.5%
France	83.3%	73.8%	65.2%	62.1%	Slovenia	83.1%	77.8%	67.8%	65.4%
Belgium	86.2%	75.6%	65.3%	65.2%	Croatia	75.7%	73.0%	62.7%	66.3%
Netherlands	90.2%	70.8%	75.8%	61.4%	Serbia	79.3%	72.1%	64.7%	71.4%
United Kingdom	92.2%	76.7%	73.5%	71.2%	Turkey	78.8%	58.2%	66.2%	68.8%
Ireland	90.2%	84.6%	84.3%	73.9%	Poland	85.7%	74.5%	69.8%	69.6%
Sweden	88.0%	63.0%	77.7%	71.7%	Czech Republic	84.1%	83.3%	61.7%	71.4%
Norway	94.0%	78.8%	81.5%	80.4%	Romania	75.1%	60.6%	67.0%	69.6%
Finland	90.2%	83.7%	77.3%	84.4%	Bulgaria	83.3%	69.4%	61.2%	55.8%

www.communicationmonitor.eu / Zerfass et al. 2019 / n ≥ 1,925 communication professionals from 22 countries. Q 2: Let's get more specific and focus on your organisation. How do you feel about the attitude towards your communication department/agency by those who interact with you? Scale 1 (Distrust us strongly) – 5 (Trust us strongly). Percentages: Frequency based on scale points 4-5.

Practitioners responsible for overall communication or strategy experience a lower level of trust by external stakeholders on the organisational level

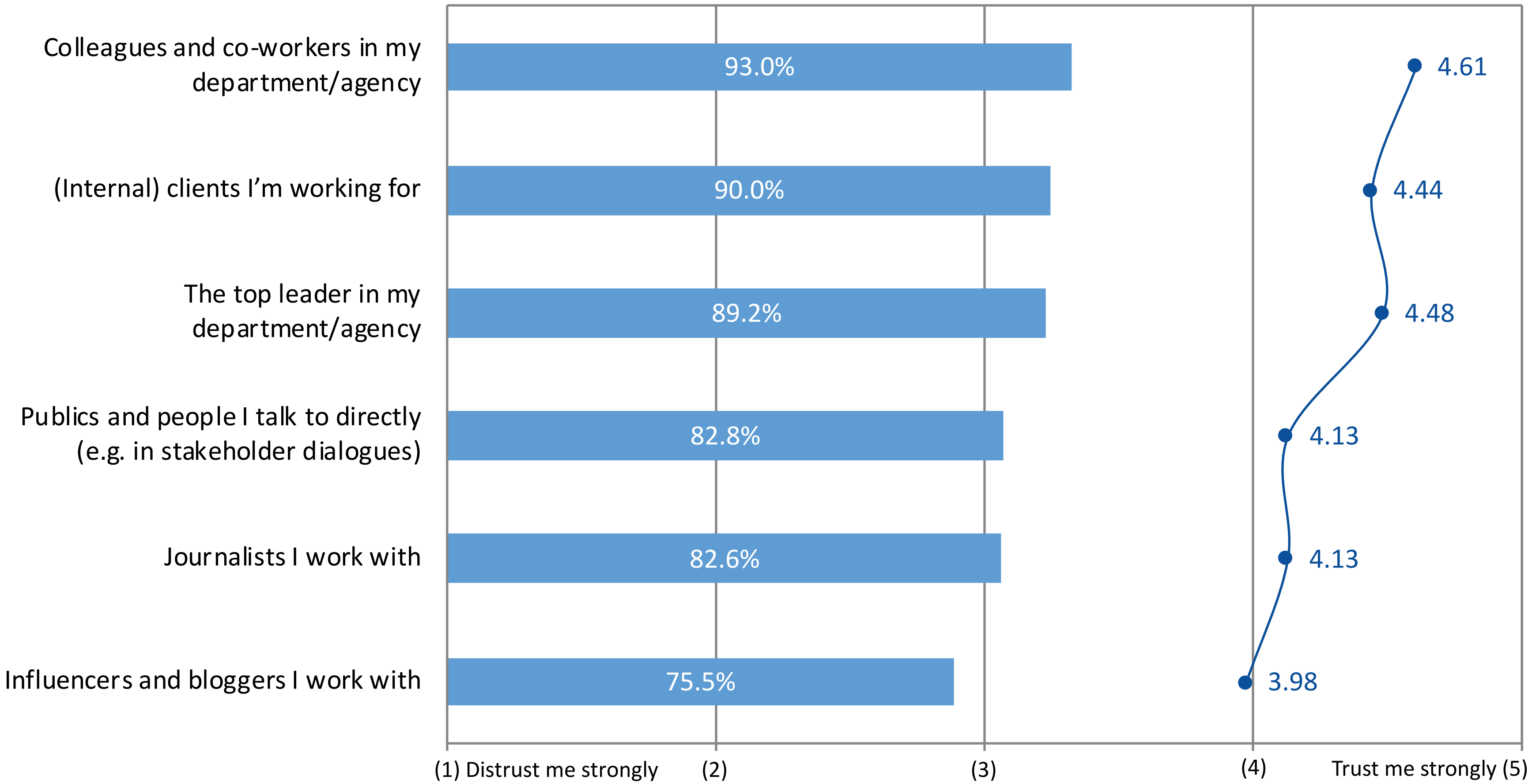
Perceived trust in the communication department/agency by …



www.communicationmonitor.eu / Zerfass et al. 2019 / n ≥ 561 communication professionals. Q 2: Let's get more specific and focus on your organisation. How do you feel about the attitude towards your communication department/agency by those who interact with you? Scale 1 (Distrust us strongly) – 5 (Trust us strongly). Mean values. ** Highly significant differences (independent samples T-Test, p ≤ 0.01).

Trust in communication practitioners personally (Micro level): A vast majority feels trusted by internal partners; external trust is a bit lower

Perceived trust in oneself by …



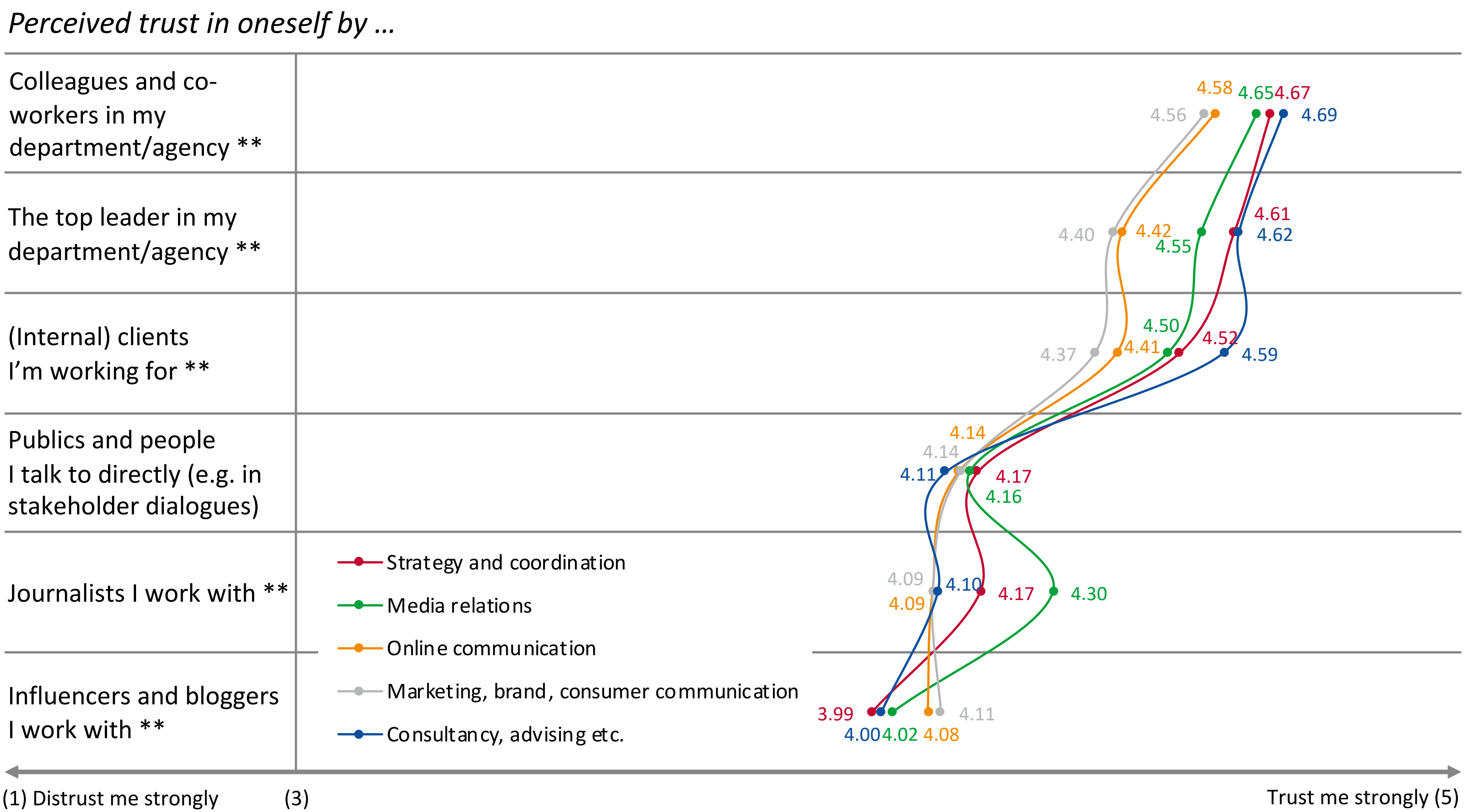
www.communicationmonitor.eu / Zerfass et al. 2019 / n ≥ 1,927 communication professionals. Q 3: And now, please think about your personal situation. In your daily work, who tends to distrust your advice and activities, and who trusts you? Think of the average level of trust in each group. Scale 1 (Distrust me strongly) – 5 (Trust me strongly). Percentages: Frequency based on scale points 4-5. Mean values.

Trust in communication practitioners by different stakeholders across Europe

	(Internal) clients I'm working for	Publics and people I talk to directly	Journalists I work with	Influencers and bloggers I work with		(Internal) clients I'm working for	Publics and people I talk to directly	Journalists I work with	Influencers and bloggers I work with
Germany	93.3%	78.8%	89.3%	74.3%	Spain	87.6%	86.7%	84.6%	72.8%
Austria	92.9%	90.4%	93.8%	78.0%	Portugal	88.6%	86.1%	72.1%	82.5%
Switzerland	92.6%	82.8%	77.8%	73.9%	Italy	86.7%	84.0%	82.1%	73.1%
France	84.8%	81.5%	75.4%	62.3%	Slovenia	90.7%	83.9%	85.9%	80.3%
Belgium	90.0%	81.0%	86.2%	71.2%	Croatia	90.7%	74.8%	81.3%	78.3%
Netherlands	94.7%	87.2%	78.0%	74.7%	Serbia	92.9%	85.5%	81.5%	74.7%
United Kingdom	97.0%	78.8%	84.9%	75.4%	Turkey	84.1%	76.9%	81.5%	79.0%
Ireland	92.0%	92.0%	90.0%	78.9%	Poland	89.3%	86.5%	87.0%	78.6%
Sweden	89.0%	86.7%	73.4%	66.7%	Czech Republic	79.1%	72.3%	88.9%	85.3%
Norway	95.1%	92.8%	86.1%	80.6%	Romania	80.9%	73.4%	68.9%	75.0%
Finland	90.4%	84.1%	83.7%	76.9%	Bulgaria	92.0%	91.7%	80.9%	76.3%

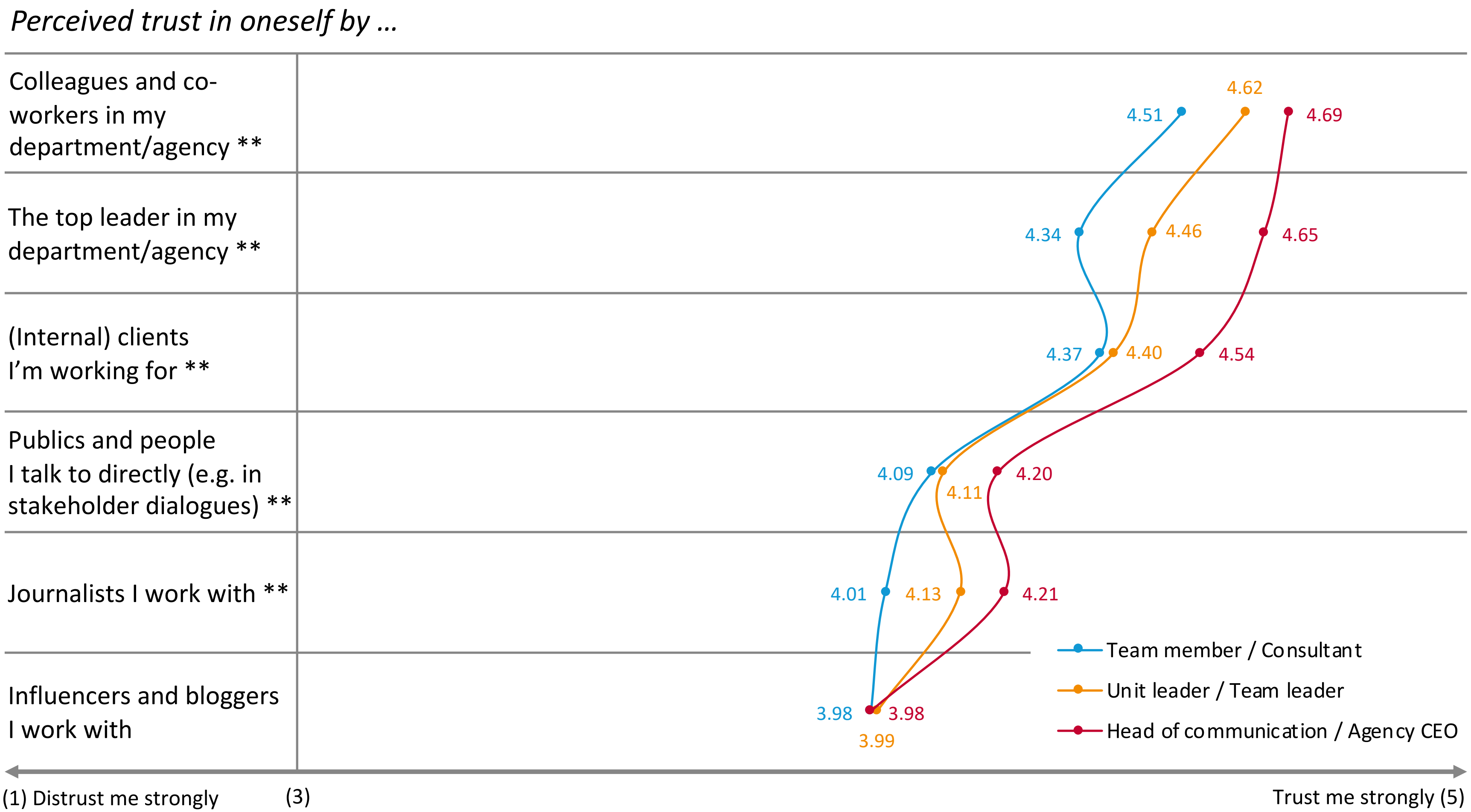
www.communicationmonitor.eu / Zerfass et al. 2019 / n ≥ 1,717 communication professionals from 22 countries. Q 3: And now, please think about your personal situation. In your daily work, who tends to distrust your advice and activities, and who trusts you? Think of the average level of trust in each group. Scale 1 (Distrust me strongly) – 5 (Trust me strongly). Percentages: Frequency based on scale points 4-5.

Practitioners working in marketing/brand and online communication experience less trust by colleagues, top leaders and clients than peers in other practices



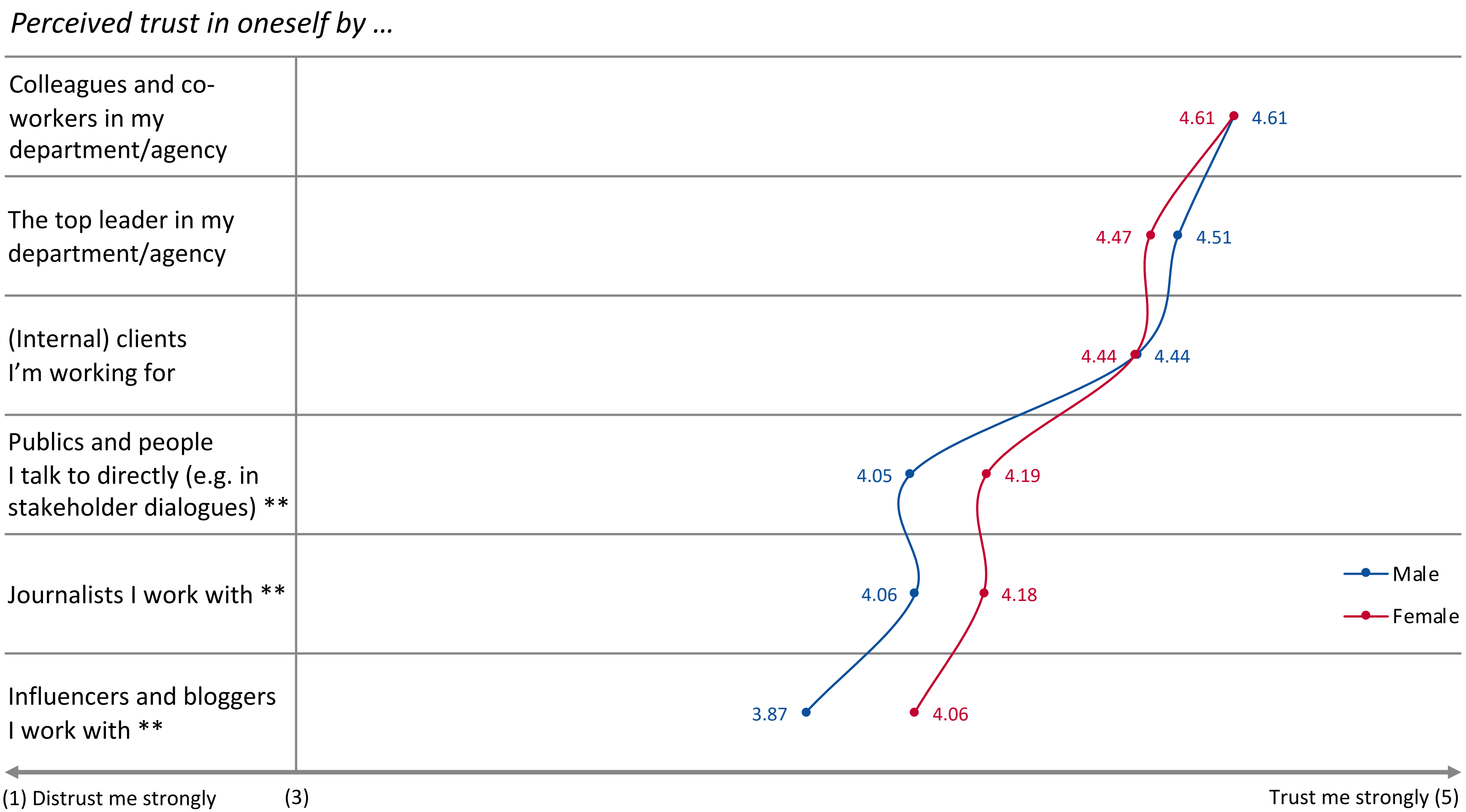
www.communicationmonitor.eu / Zerfass et al. 2019 / n ≥ 436 communication professionals. Q 3: And now, please think about your personal situation. In your daily work, who tends to distrust your advice and activities, and who trusts you? Think of the average level of trust in each group. Scale 1 (Distrust me strongly) – 5 (Trust me strongly). Mean values. ** Highly significant differences (independent samples T-Test, p ≤ 0.01).

Hierarchy matters: Communication leaders feel significantly more trusted than professionals in other ranks



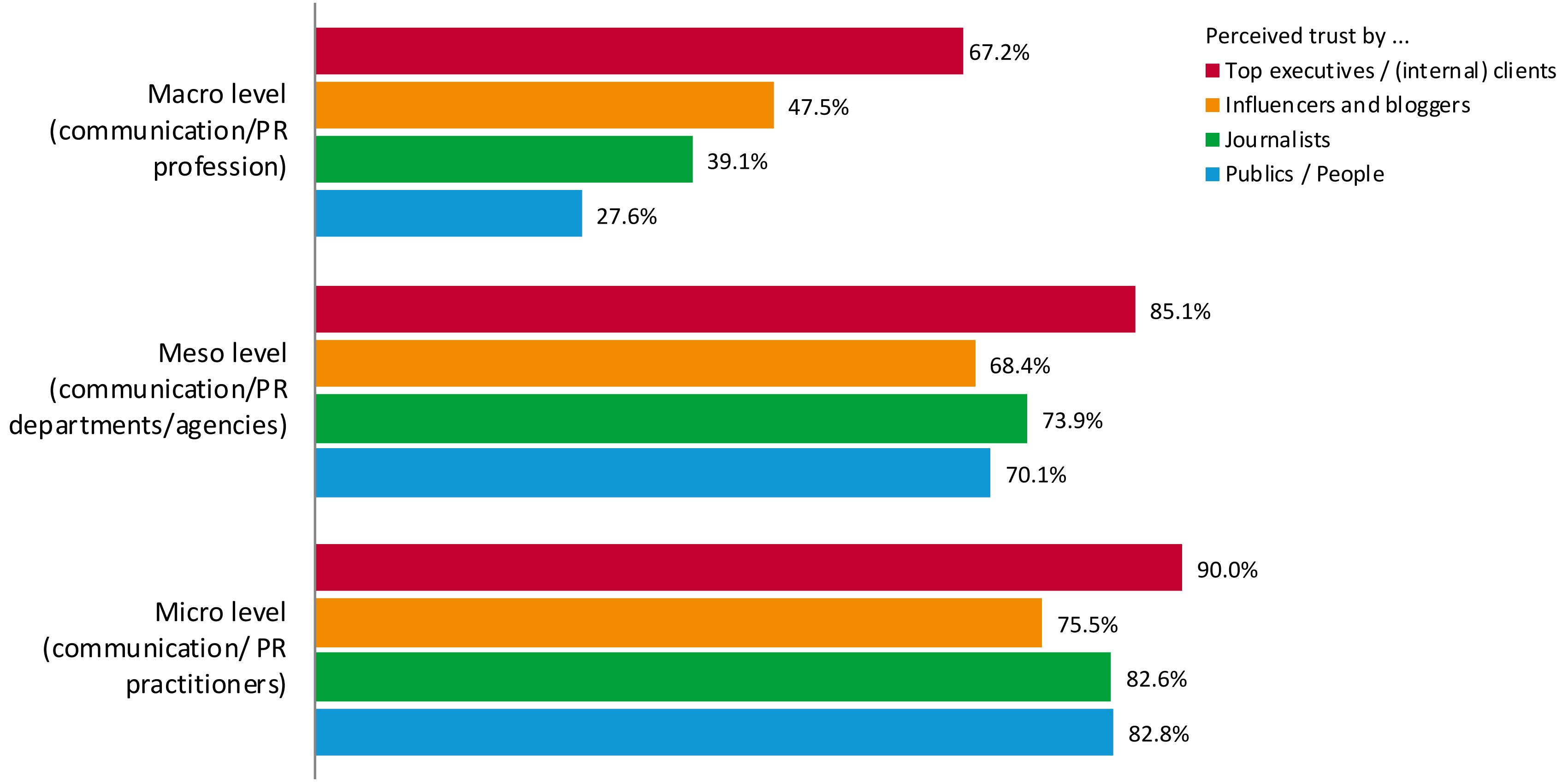
www.communicationmonitor.eu / Zerfass et al. 2019 / n ≥ 1,808 communication professionals. Q 3: And now, please think about your personal situation. In your daily work, who tends to distrust your advice and activities, and who trusts you? Think of the average level of trust in each group. Scale 1 (Distrust me strongly) – 5 (Trust me strongly). Mean values. ** Highly significant differences (Kendall rank correlation, p ≤ 0.01).

Female communication practitioners report more trusted relationships with external stakeholders, but men are on better terms with top leaders



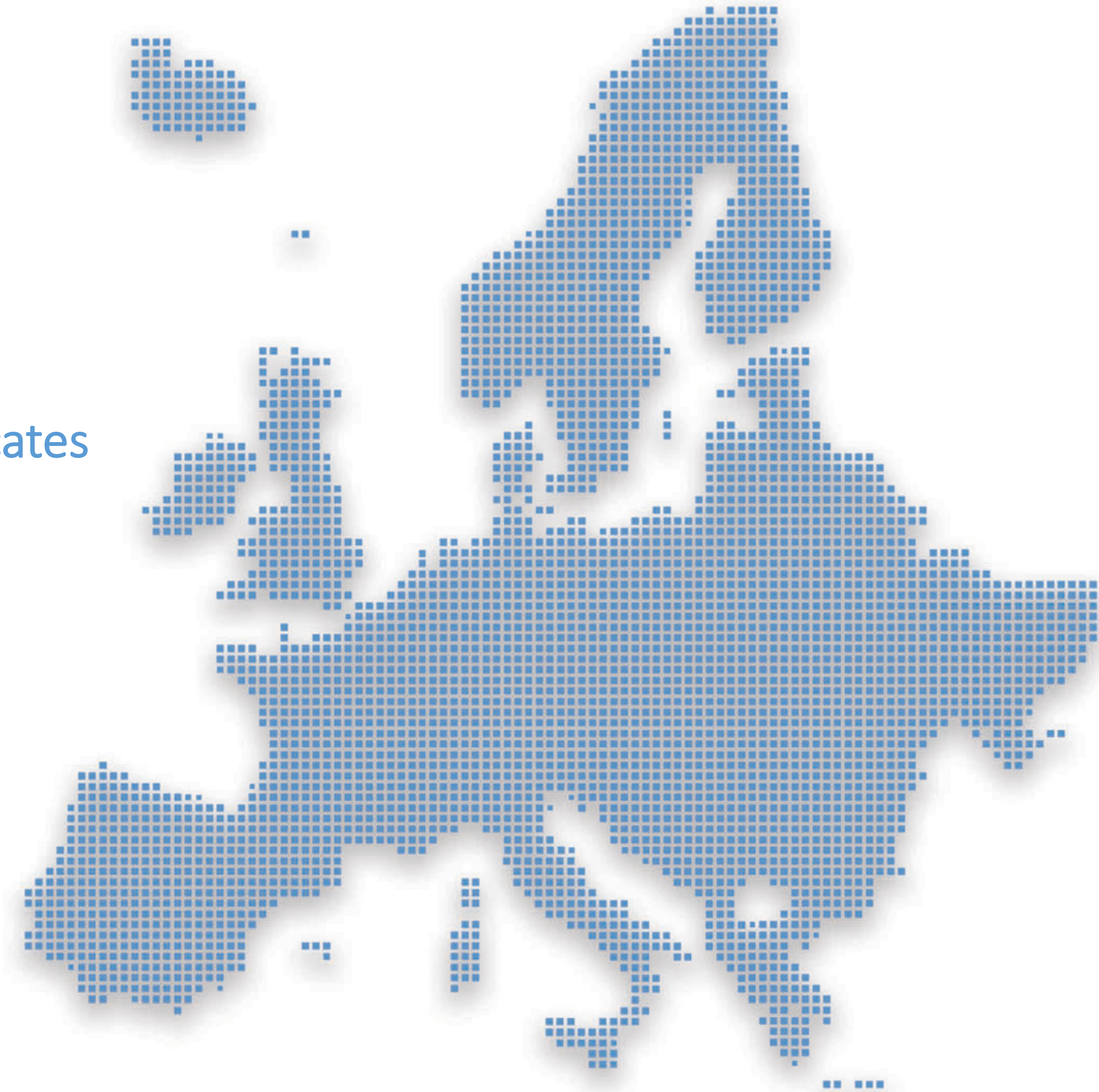
www.communicationmonitor.eu / Zerfass et al. 2019 / n ≥ 1,923 communication professionals. Q 3: And now, please think about your personal situation. In your daily work, who tends to distrust your advice and activities, and who trusts you? Think of the average level of trust in each group. Scale 1 (Distrust me strongly) – 5 (Trust me strongly). Mean values. ** Highly significant differences (independent samples T-Test, p ≤ 0.01).

Trust in strategic communication and public relations: Clear differences between different levels and stakeholders



www.communicationmonitor.eu / Zerfass et al. 2019 / n ≥ 1,927 communication professionals. Q 1: In many European countries, trust in the mass media and journalism is declining. This might be true for other communicators as well – those who communicate on behalf of companies, non-profits, governments, political parties, etc. Based on your experience, how much do the following groups trust the public relations/communications profession in your country? Q 2: Let's get more specific and focus on your organisation. How do you feel about the attitude towards your communication department/agency by those who interact with you? Q 3: And now, please think about your personal situation. In your daily work, who tends to distrust your advice and activities, and who trusts you? Think of the average level of trust in each group. Scale 1 (Distrust strongly) – 5 (Trust strongly). Percentages: Frequency based on scale points 4-5.

Public trust in organisational advocates



Chapter overview

Communication and PR professionals are not the only persons speaking on behalf of organisations. Formal representatives like CEOs and board members or marketing and sales people, as well as other employees and members of the organisation play a role as well, whether they are coached by practitioners or not. External experts in the field, customers, fans and supporters, and even activists with overlapping interests can also support. Knowing about different advocates and choosing or supporting them carefully is an important part of strategic communication.

Literature and earlier research suggest that public trust in academic experts and external people ("a person like me") is higher than in representatives of organisations. Among those, regular employees are rated more credible than CEOs or board members (Edelman, 2019). This makes employees an important channel for spreading the word about the organisation (Andersson, 2019). Within the "communicative organisation" (Heide et al., 2019; Zerfass & Viertmann, 2016) employees with specific knowledge and strong social networks can be very effective as corporate influencers (Niederhäuser & Rosenberger, 2018). Social media are generally considered as more credible than journalistic media because of their perceived authenticity. Social media provide the "views of real people"; there is no gatekeeping involved (Newman et al., 2017).

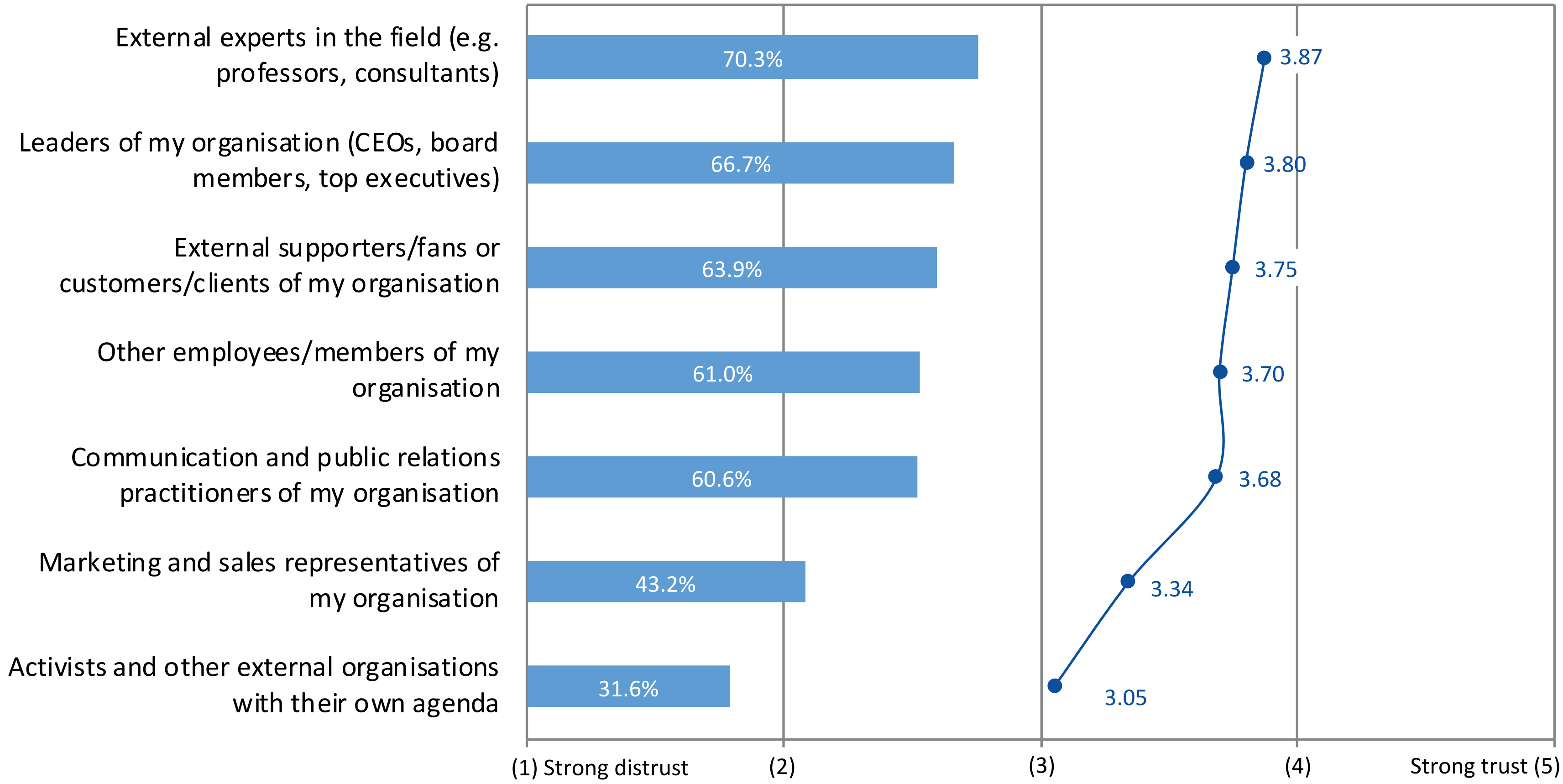
This year's monitor asked communication and PR professionals how they experience the trust of the general public in different groups speaking on behalf of their organisation. Practitioners think that most other advocates are more trustworthy than themselves. They perceive external experts in the field (like professors or consultants) as the most trusted (70.3 per cent), followed by leaders of the organisation (CEOs, board members and top executives; 66.7 per cent), external supporters like fans or customers/clients (63.9 per cent). Other employees or members of the organisation are reported to achieve a similar trust level like communication professionals (61.0 / 60.6 per cent). Marketing and sales representatives are rated lower (43.2 per cent). Public trust in external organisations, such as activists who act as advocates for organisations, is perceived surprisingly low (31.6 per cent). Respondents working in non-profits rate public trust in external experts and supporters significantly higher than their peers in other organisations, and they also experience a higher level of trust in themselves.

Professionals do not perceive much distrust in advocates speaking on behalf of organisations. Only 4.4 per cent of them report distrust and the majority of 52.5 per cent thinks that ordinary people in their country trusts organisational advocates. But there are significant differences across Europe. The perception of overall public trust in advocates is lowest in Germany, France, Poland, the United Kingdom and Italy; and highest in Ireland, Finland, Norway, and Sweden.

The findings about public trust in different speakers are partly in line with previous research based on stakeholder surveys and public opinion polls. Communication professionals think that employees are more trusted than themselves, but not as much as the literature suggests. Practitioners have also, contrary to what the literature says, a strong confidence in the trust people have in leaders of their organisations.

Public trust in organisational advocates: External experts, supporters, top managers and employees are more trusted than communication practitioners

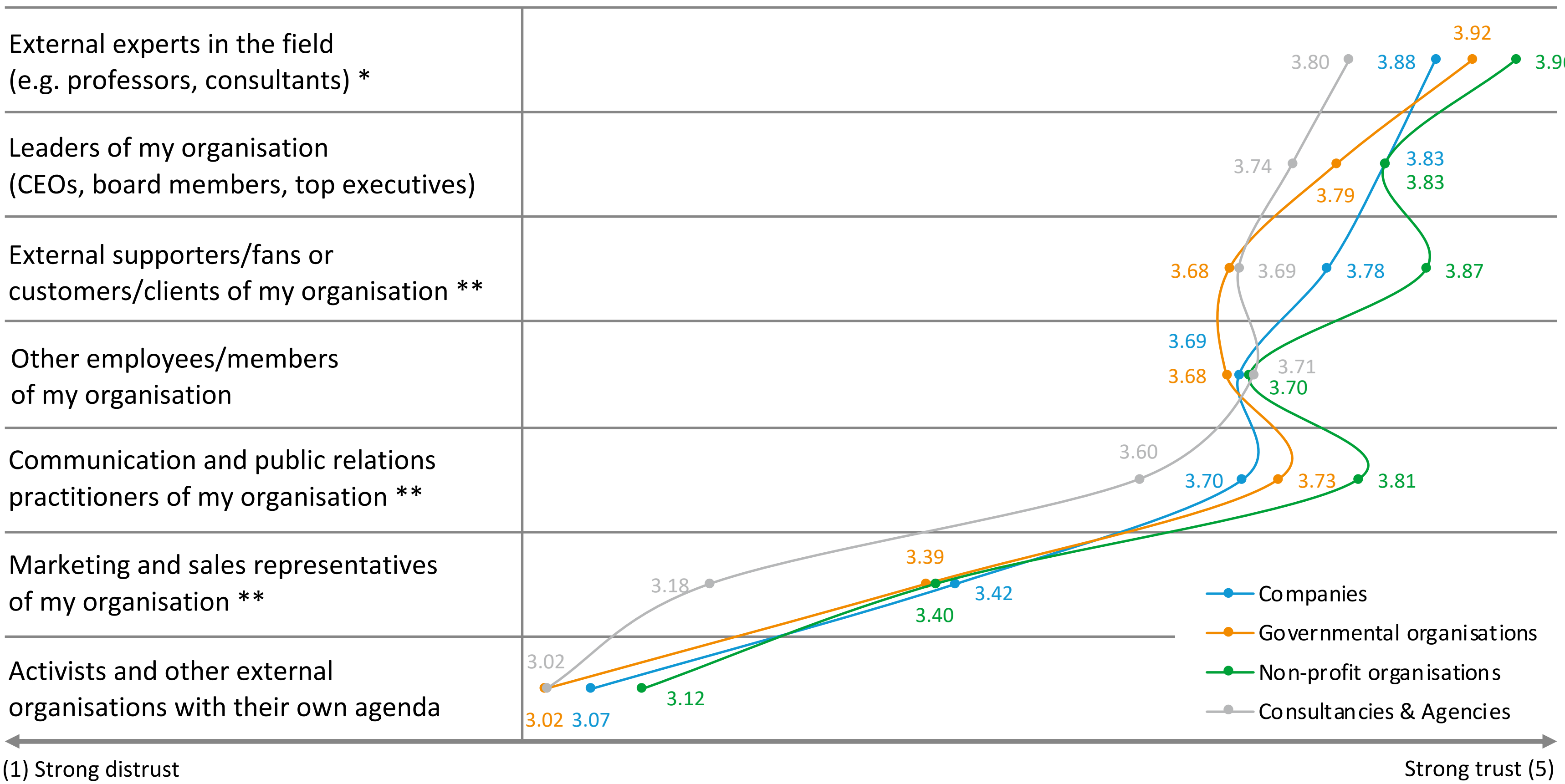
Perceived trust of ordinary people (the general population) in …



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,526 communication professionals. Q 4: In addition to communication professionals there are many others who can speak on behalf of an organisation: top managers, marketing professionals, all of the organisation's employees, external experts, or external customers/clients. Thinking of your organisation, how much do ordinary people in your country (the general population) trust these communicators? Scale 1 (Strong distrust) – 5 (Strong trust). Percentages: Frequency based on scale points 4-5. Mean values.

Practitioners working in non-profits rate public trust in external experts, external supporters and PR professionals higher than peers in other organisations

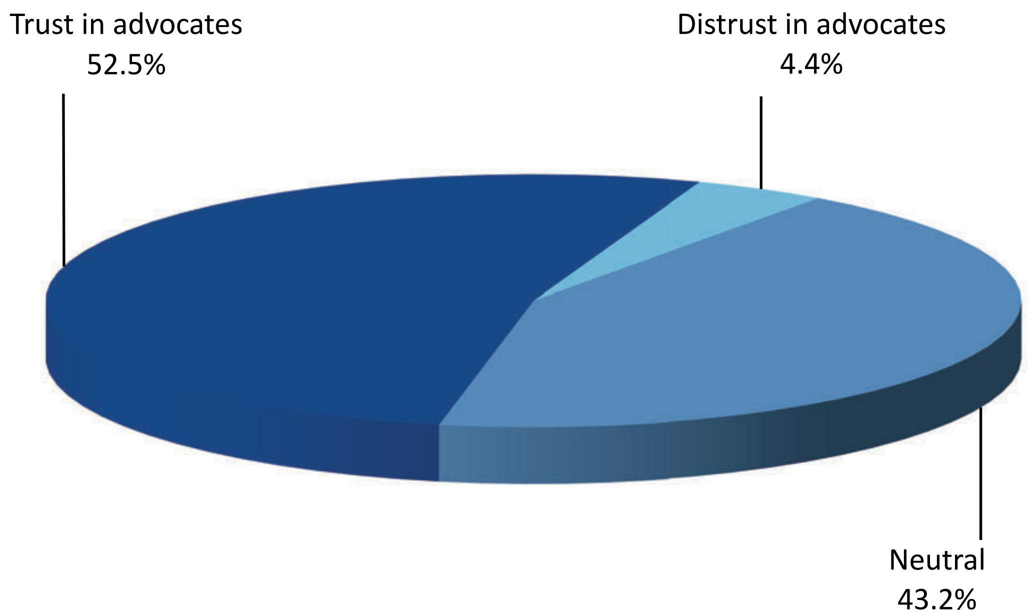
Perceived trust of ordinary people (the general population) in …



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,526 communication professionals. Q 4: In addition to communication professionals there are many others who can speak on behalf of an organisation: top managers, marketing professionals, all of the organisation's employees, external experts, or external customers/clients. Thinking of your organisation, how much do ordinary people in your country (the general population) trust these communicators? Scale 1 (Strong distrust) – 5 (Strong trust). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01). * Significant differences (ANOVA, p ≤ 0.05).

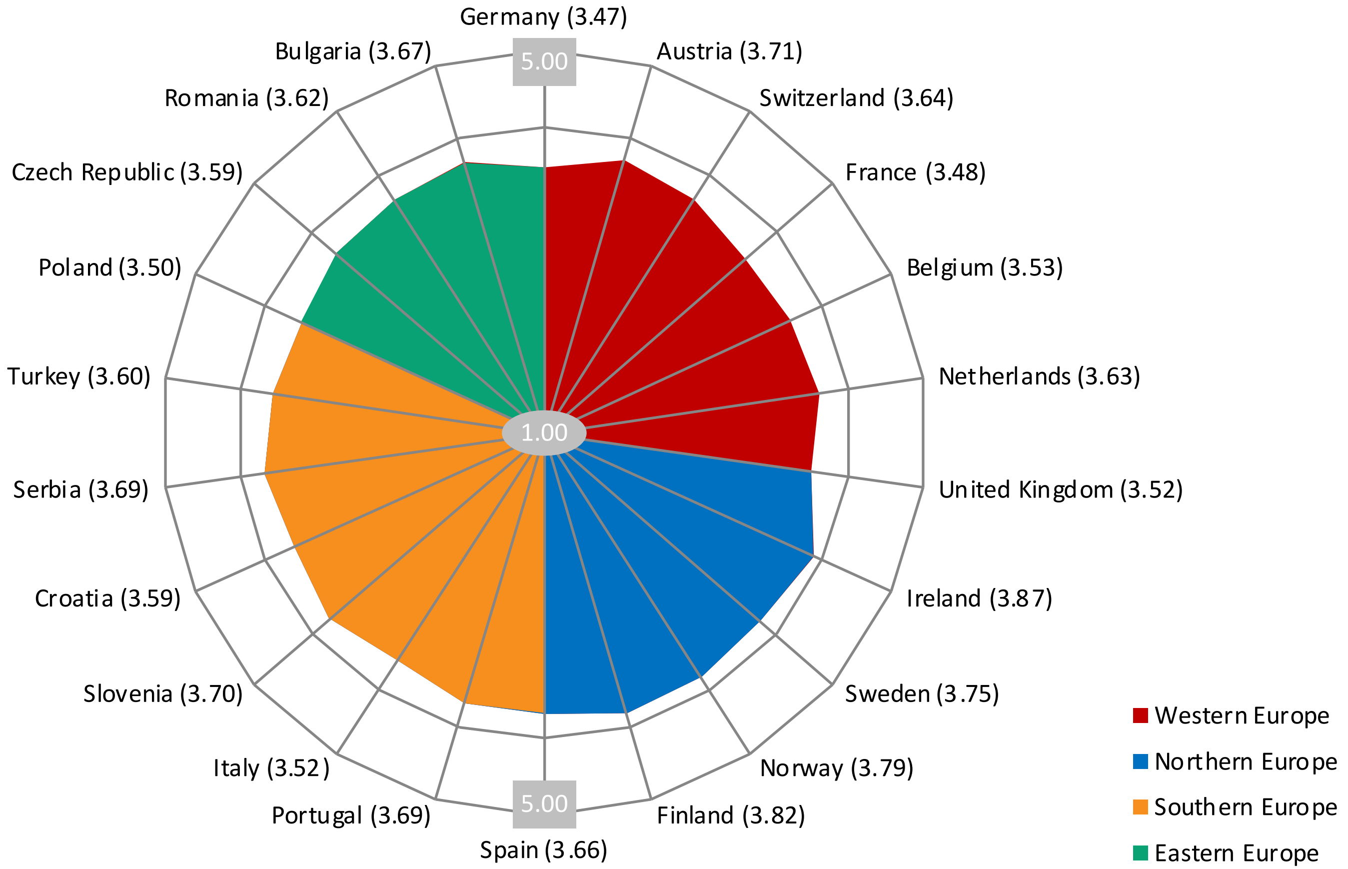
Overall public trust in those speaking on behalf of organisations: Most practitioners report about positive or neutral attitudes

Perceived trust of ordinary people (the general population) in all advocates



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,526 communication professionals. Q 4: In addition to communication professionals there are many others who can speak on behalf of an organisation: top managers, marketing professionals, all of the organisation's employees, external experts, or external customers/clients. Thinking of your organisation, how much do ordinary people in your country (the general population) trust these communicators? (Communication/PR, Marketing/Sales, Leaders, Other employees, External experts, External supporters, External activists). Scale 1 (Strong distrust) – 5 (Strong trust). Index based on mean values for all internal advocates (Communication/PR, Marketing/Sales, Leaders, Other employees): Distrust (1.00-2.49), Neutral (2.50-3.50), Trust (3.51-5.00).

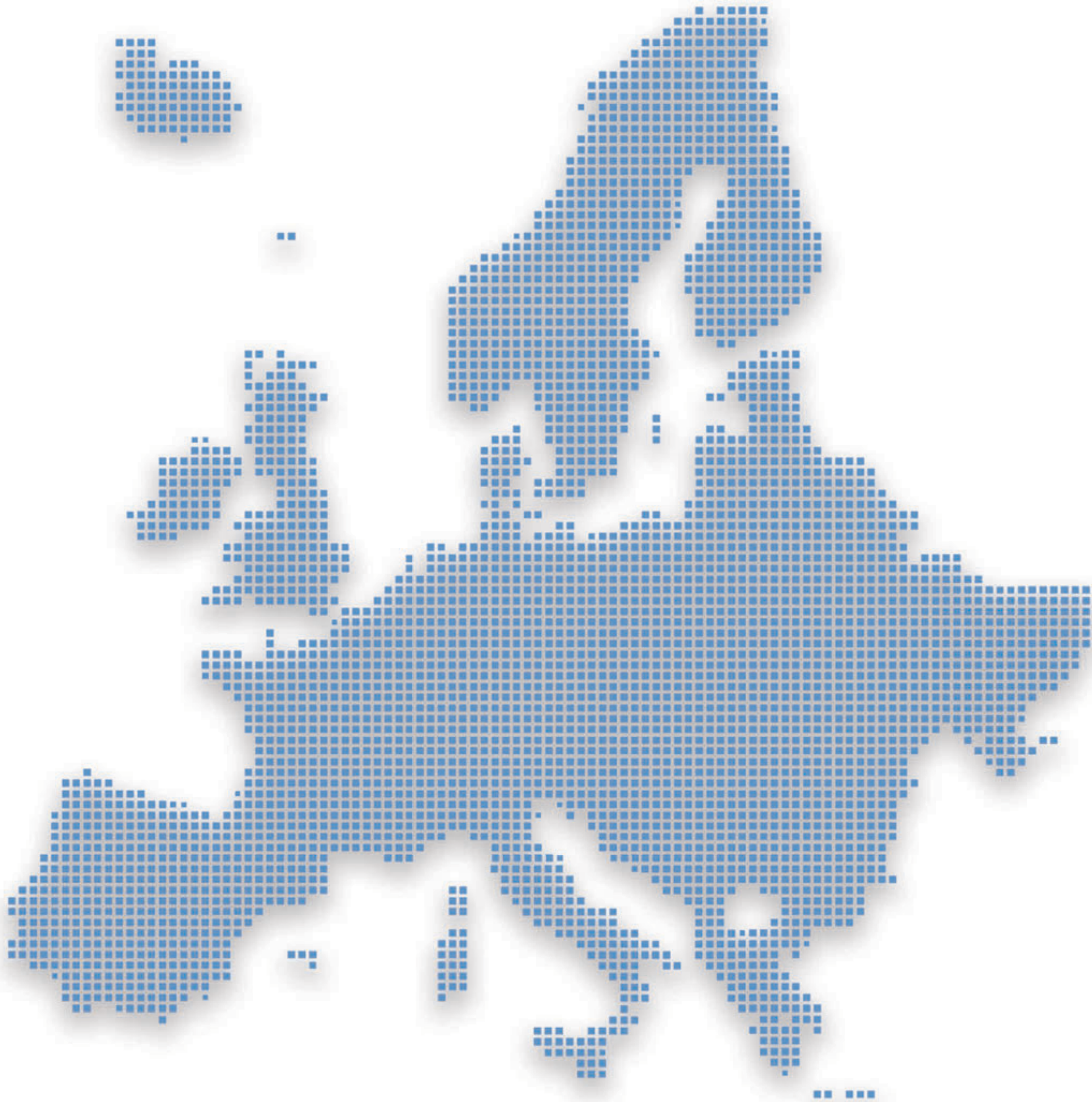
Overall public trust in advocates differs significantly across Europe: Germany, France, Poland, UK and Italy are lagging behind



Index ranging from 1 (Strong distrust) – 5 (Strong trust)

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,269 communication professionals from 22 countries. Q 4: In addition to communication professionals there are many others who can speak on behalf of an organisation: top managers, marketing professionals, all of the organisation's employees, external experts, or external customers/clients. Thinking of your organisation, how much do ordinary people in your country (the general population) trust these communicators? (Communication/PR, Marketing/Sales, Leaders, Other employees, External experts, External supporters, External activists). Scale 1 (Strong distrust) – 5 (Strong trust). Index based on mean values for all internal advocates (Communication/PR, Marketing/Sales, Leaders, Other employees): Distrust (1.00-2.49), Neutral (2.50-3.50), Trust (3.51-5.00). Highly significant differences (ANOVA, p ≤ 0.01).

Challenges of building trust and transparency



Chapter overview

Communication management can strive to gain stakeholders' trust on different levels (Arthur W. Page Society & Business Roundtable Institute for Corporate Ethics, 2007). Literature shows that there is often a gap between trust levels of a particular company or organisation and the institutional level of businesses, e.g. the financial sector, the energy sector or retailing (Harris & Wicks, 2010).

A key antecedent of trustworthiness is organisational openness and transparency (Albu & Flyverbom 2019; Edelman, 2007; Schnackenberg & Tomlinson, 2016). Transparency includes several dimensions: sharing substantial information, allowing stakeholders to participate in information decisions, providing information that holds the organisation accountable and being open. All these dimensions contribute to building trust (Rawlins, 2007). At the same time, transparent communication is often used as a buzzword and is difficult to achieve in practice (Christensen, 2002; Christensen & Cornelissen, 2015; Thakor, 2015). Many issues like strategies and internal processes are well-kept secrets, and others like political standpoints of the top management might have controversial effects when debated openly.

The ECM 2019 asked communication professionals about the challenges they encounter when trying to build trust and transparency for organisations. The results show that enhancing trust with stakeholders is a key goal for practitioners in their daily work. When comparing different trust objects, enhancing trust in the organisation and/or its brands is mentioned most often (by 89.3 per cent). Enhancing trust on the institutional level of the market, business or sector ranks second (82.0 per cent), and enhancing trust in organisational leaders comes third (79.1 per cent). Interestingly sector-specific trust seems to be more important than several years ago, when the monitor explored the issue for the first time (Zerfass et al., 2011, p. 77).

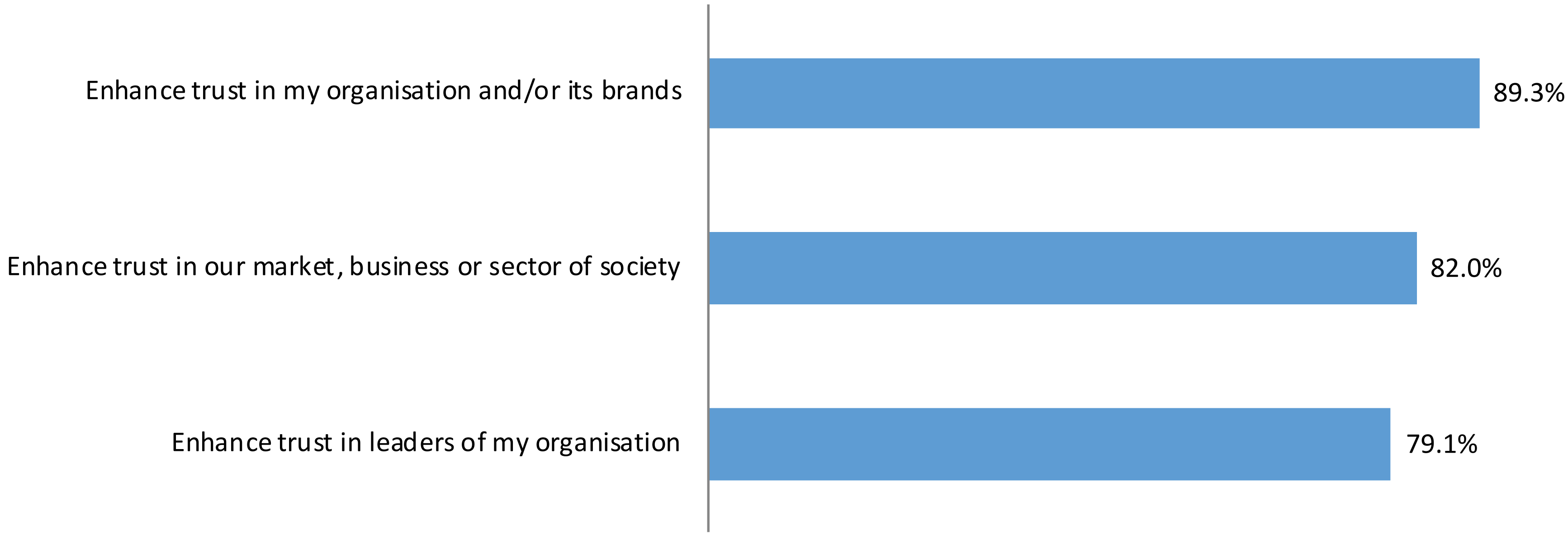
Practitioners report that transparency, defined as telling what you know and disclosing contexts, is the most difficult to achieve and therefore the biggest challenge of trust-building communication. Most respondents (71.0 per cent) think that this is sometimes, often or always challenging. Being knowledgeable and being ethical are considered less problematic.

The study shows why it is hard to communicate transparently in the world of business and organisations. Practitioners find it most difficult to communicate transparently about the political stance of their leadership team (41.1 per cent think this is difficult) and about internal processes and workflows (35.1 per cent). Being transparent about employees or members and top-level strategies is also tough (reported by 24.2 / 23.6 per cent). According to the respondents, it is much easier for organisations to be transparent about their purpose, mission and vision (only 7.7 per cent think this is difficult) and about their products and services (10.9 per cent). An overall Transparency Index based on ten different items shows that organisations from Northern Europe find it less difficult to be transparent than organisations from other parts of Europe.

To conclude, the results show that transparent communication is not easy to achieve for organisations – both about aspects belonging to what the Committee for Economic Development (1971) called the outer circle of social responsibility of organisations (their role in society) and about aspects of their inner circle of responsibility, i.e. the efficient execution of economic tasks. It seems especially difficult to be transparent about strategies and processes used to reach organisational goals.

Enhancing trust by stakeholders is a key goal for communication professionals – and mainly focused on the organisation and its brands

Goals in the daily work of communication professionals



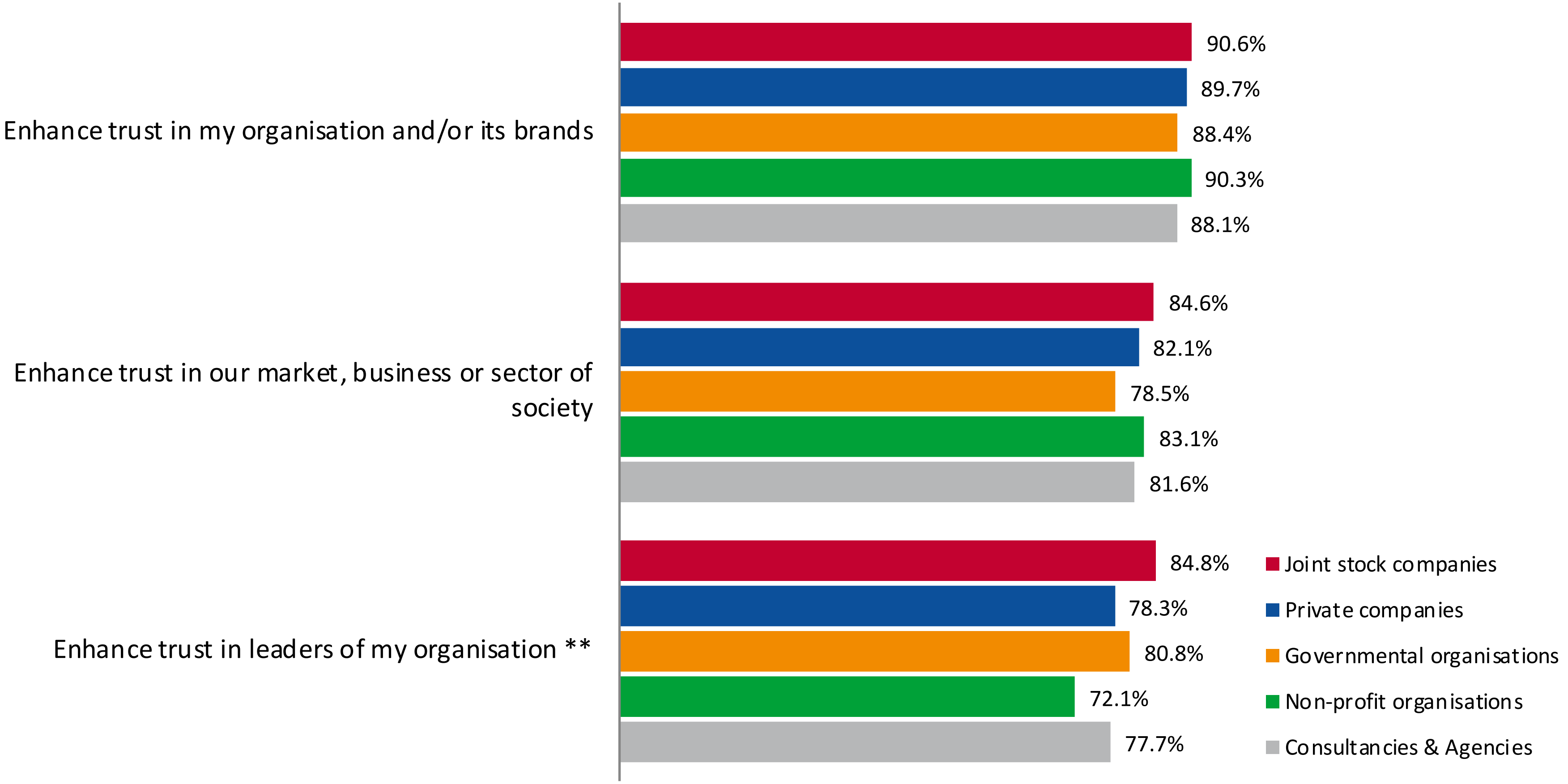
37.9%
rate "building and maintaining trust"
as one of the top three strategic issues
for communications until 2022

Enhance trust in ...	2019	2011	Δ
Organisation/brands	89.3%	93.2%	- 4.9
Markets	82.0%	76.8%	+ 5.2
Leaders	79.1%	79.3%	- 0.2

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals. Q 5: Communication management may strive to gain stakeholders' trust on different levels. How relevant are each of the following goals in your daily work? Zerfass et al. 2011 / n =1,450 / Q 9. Scale 1 (Not relevant) – 5 (Very relevant). Percentages: Frequency based on scale points 4-5. Q 8: 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.

Trust-building for leaders is practised most intensively in joint stock companies and government-owned, public sector and political organisations

Goals in the daily work of communication professionals



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals. Q 5: Communication management may strive to gain stakeholders' trust on different levels. How relevant are each of the following goals in your daily work? Scale 1 (Not relevant) – 5 (Very relevant). Percentages: Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, p ≤ 0.01).

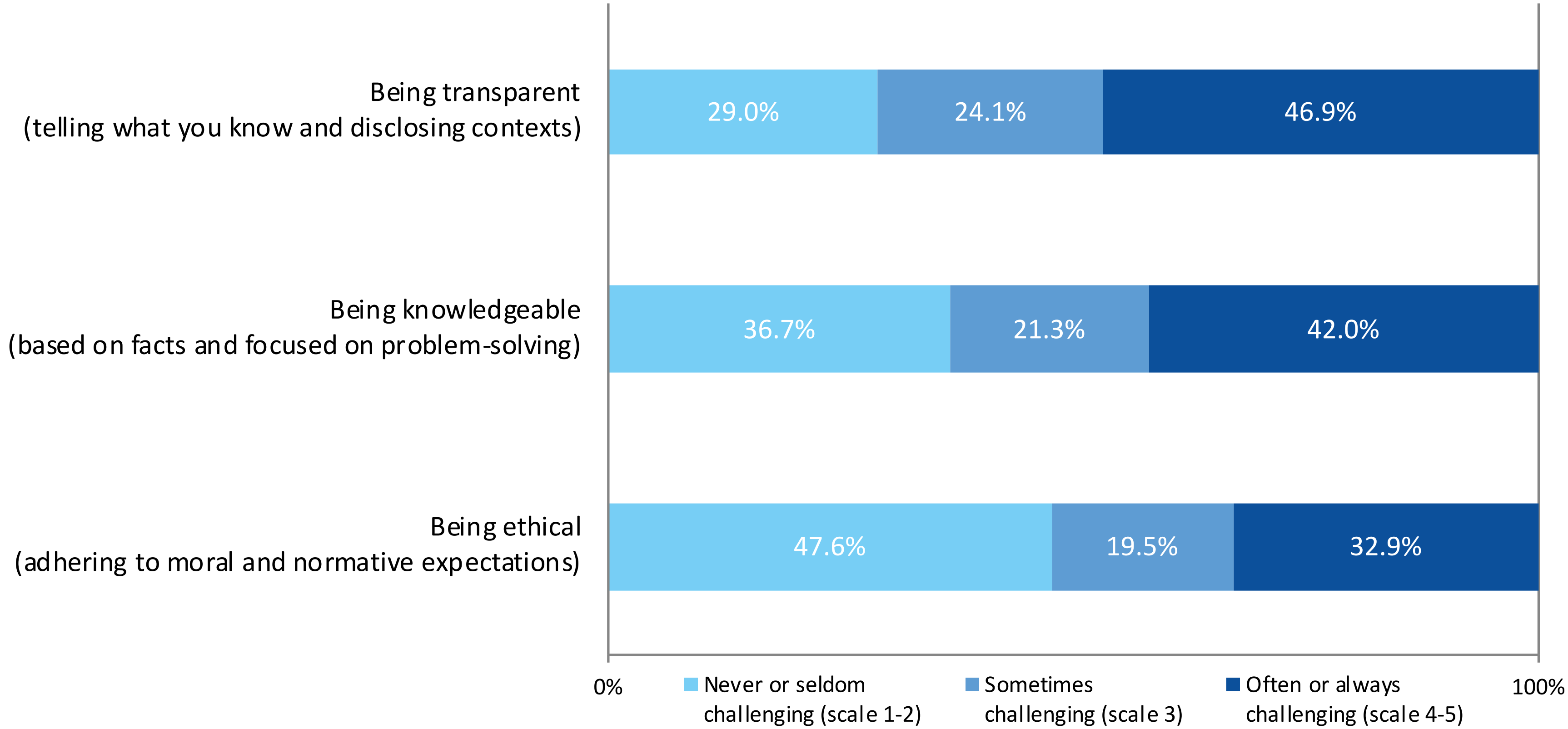
Focus of trust-building communication across Europe

	Enhance trust in my organisation and/or its brands	Enhance trust in our market, business or sector of society	Enhance trust in leaders of my organisation		Enhance trust in my organisation and/or its brands	Enhance trust in our market, business or sector of society	Enhance trust in leaders of my organisation
Germany	91.0%	80.6%	81.3%	Spain	96.2%	86.5%	92.5%
Austria	88.2%	81.6%	83.1%	Portugal	95.1%	92.6%	86.4%
Switzerland	91.8%	81.6%	84.7%	Italy	85.7%	78.6%	73.2%
France	84.8%	74.2%	72.7%	Slovenia	92.3%	85.7%	83.5%
Belgium	91.5%	81.8%	68.8%	Croatia	86.8%	78.1%	82.5%
Netherlands	91.9%	81.6%	75.7%	Serbia	89.1%	89.1%	82.4%
United Kingdom	94.2%	83.6%	81.9%	Turkey	85.3%	75.0%	80.9%
Ireland	94.2%	90.4%	80.8%	Poland	83.9%	78.6%	69.6%
Sweden	94.2%	83.7%	79.8%	Czech Republic	87.5%	83.3%	66.7%
Norway	88.2%	87.1%	77.6%	Romania	81.1%	77.0%	77.0%
Finland	90.6%	87.5%	79.2%	Bulgaria	82.0%	80.0%	78.0%

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,420 communication professionals from 22 countries. Q 5: Communication management may strive to gain stakeholders' trust on different levels. How relevant are each of the following goals in your daily work? Scale 1 (Not relevant) – 5 (Very relevant). Percentages: Frequency based on scale points 4-5.

Challenges of trust-building communication: Transparency is most difficult to achieve

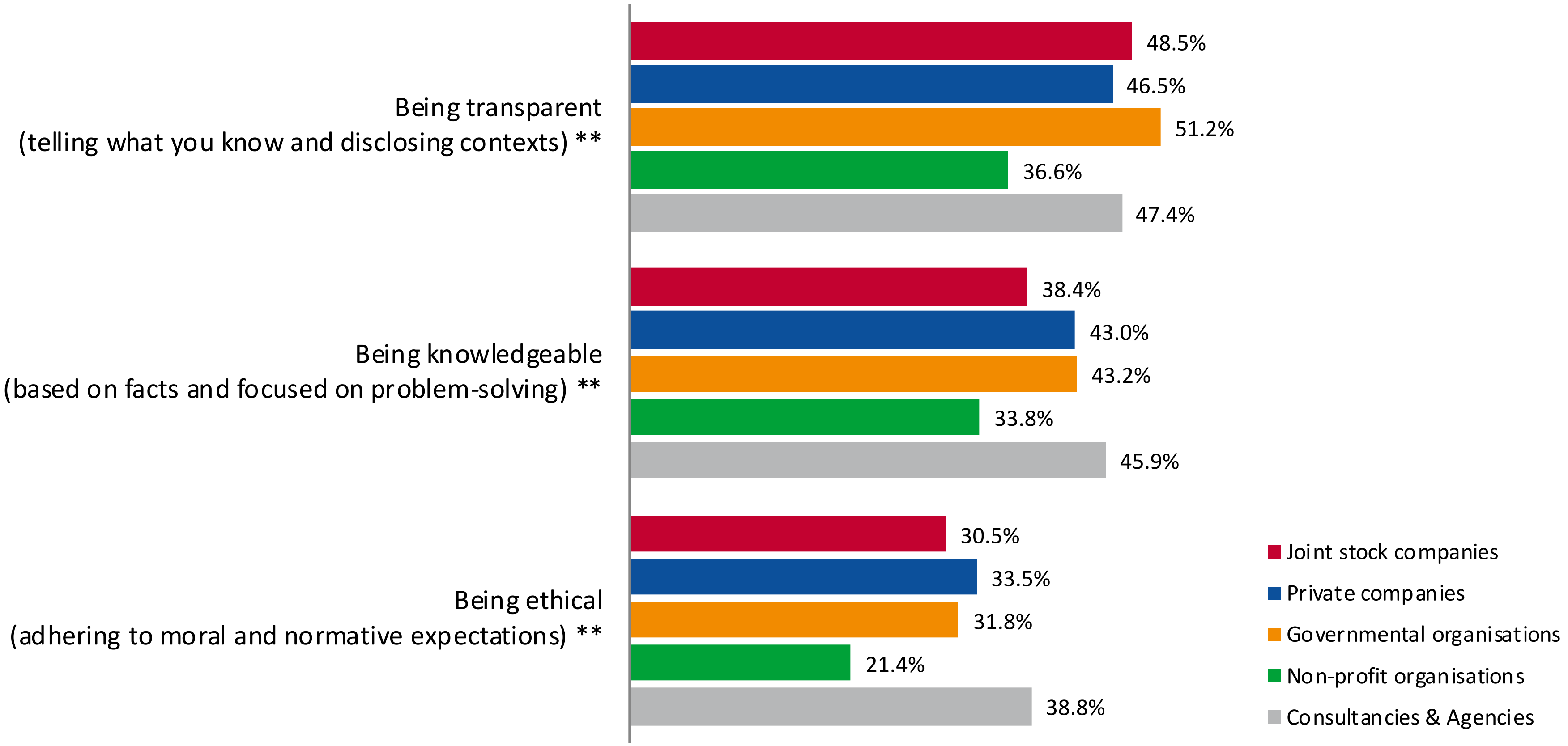
Challenges when communicating with stakeholders



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals. Q 6: Building trust through communication can be difficult. Previous research shows that communication needs to be based on knowledge, and it should be transparent and ethical, too. This is sometimes not easy to achieve. Based on your experience, how challenging is it to meet the following aspects when communicating with stakeholders? Scale 1 (Never challenging) – 5 (Always challenging).

Practitioners working in governmental organisations and joint-stock companies find it especially hard to be transparent

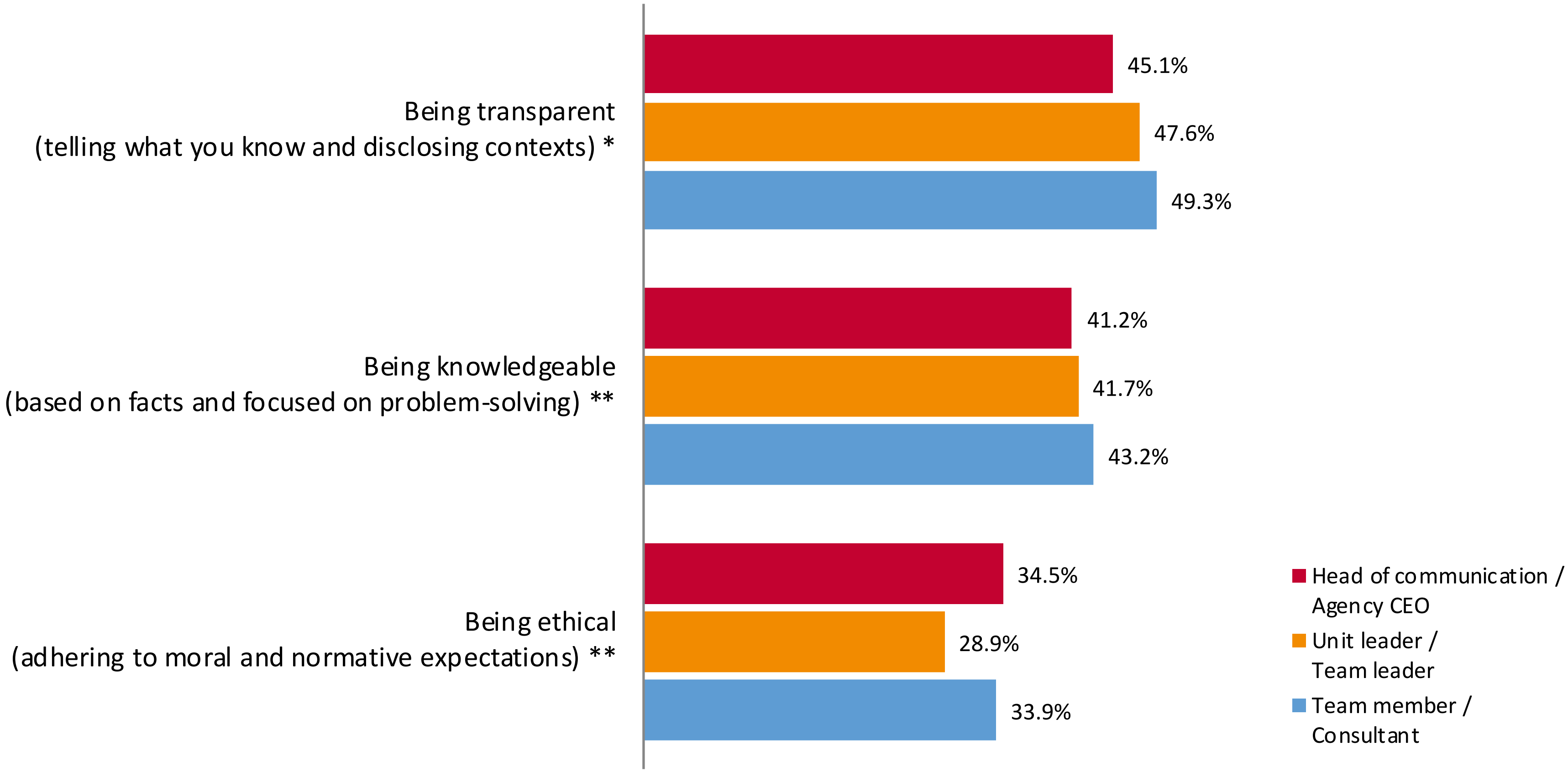
Challenges when communicating with stakeholders



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals. Q 6: Building trust through communication can be difficult. Previous research shows that communication needs to be based on knowledge, and it should be transparent and ethical, too. This is sometimes not easy to achieve. Based on your experience, how challenging is it to meet the following aspects when communicating with stakeholders? Scale 1 (Never challenging) – 5 (Always challenging). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, $p \leq 0.01$).

Team members and consultants are more concerned about being transparent and knowledgeable than communication leaders

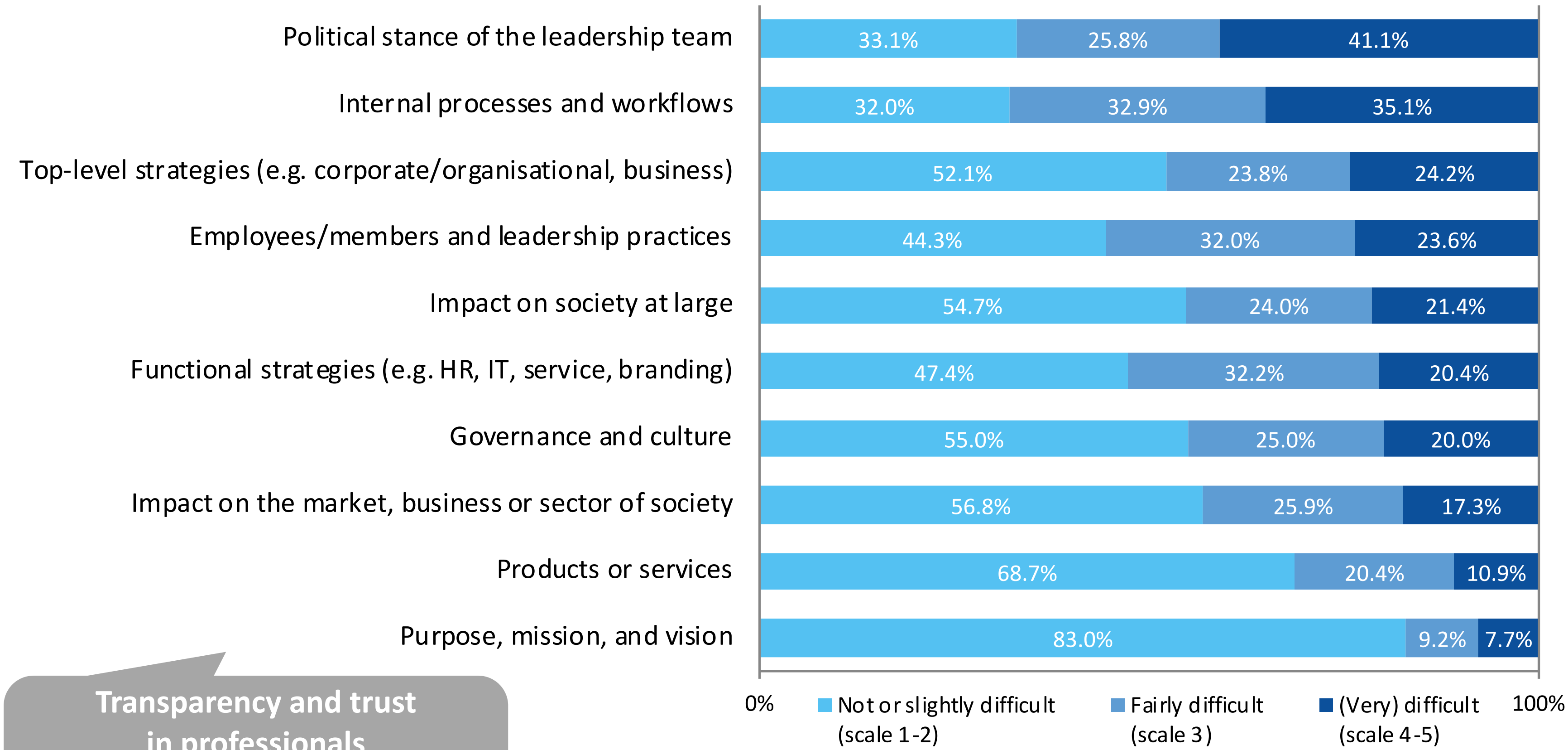
Challenges when communicating with stakeholders



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,514 communication professionals. Q 6: Building trust through communication can be difficult. Previous research shows that communication needs to be based on knowledge, and it should be transparent and ethical, too. This is sometimes not easy to achieve. Based on your experience, how challenging is it to meet the following aspects when communicating with stakeholders? Scale 1 (Never challenging) – 5 (Always challenging). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, p ≤ 0.01). * Significant differences (chi-square test, p ≤ 0.05).

Transparency in communications

How difficult it is for organisations to be transparent about relevant topics



Transparency and trust in professionals

Respondents experiencing less difficulties with being transparent report a higher level of trust in themselves and their departments

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,596 communication professionals. Q 7: Transparency can enhance trust. But some information might not be accessible to communication professionals, and some facts may not be suitable for sharing publicly. How difficult is it for your organisation to be transparent about: … Scale 1 (Not difficult) – 5 (Very difficult).

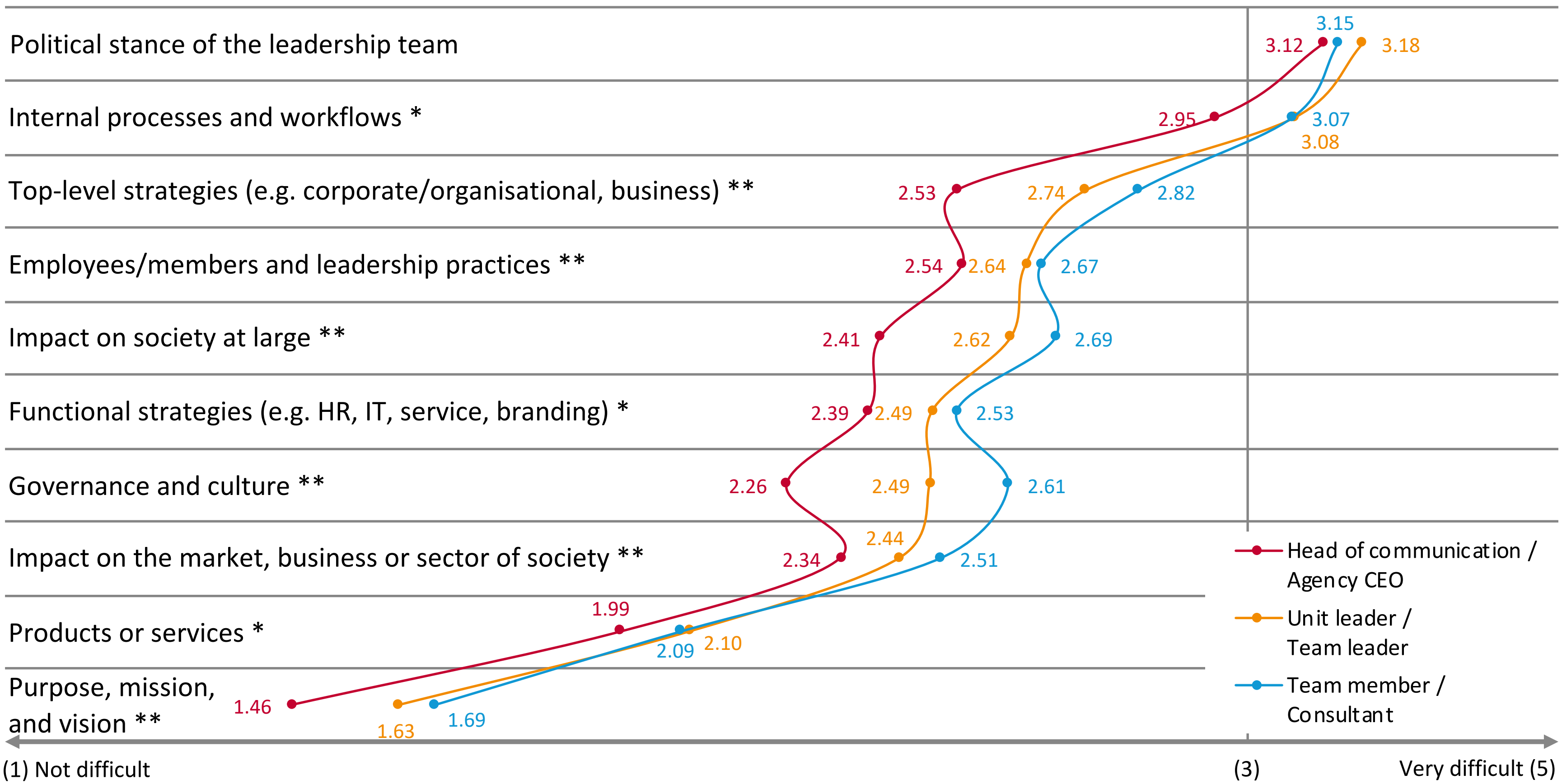
Companies find it especially hard to be transparent about the political mindset of top executives, internal management systems and strategies

How difficult it is for organisations to be transparent about relevant topics

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,596 communication professionals. Q 7: Transparency can enhance trust. But some information might not be accessible to communication professionals, and some facts may not be suitable for sharing publicly. How difficult is it for your organisation to be transparent about: … Scale 1 (Not difficult) – 5 (Very difficult). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, $p \leq 0.01$). * Significant differences (chi-square test, $p \leq 0.05$).

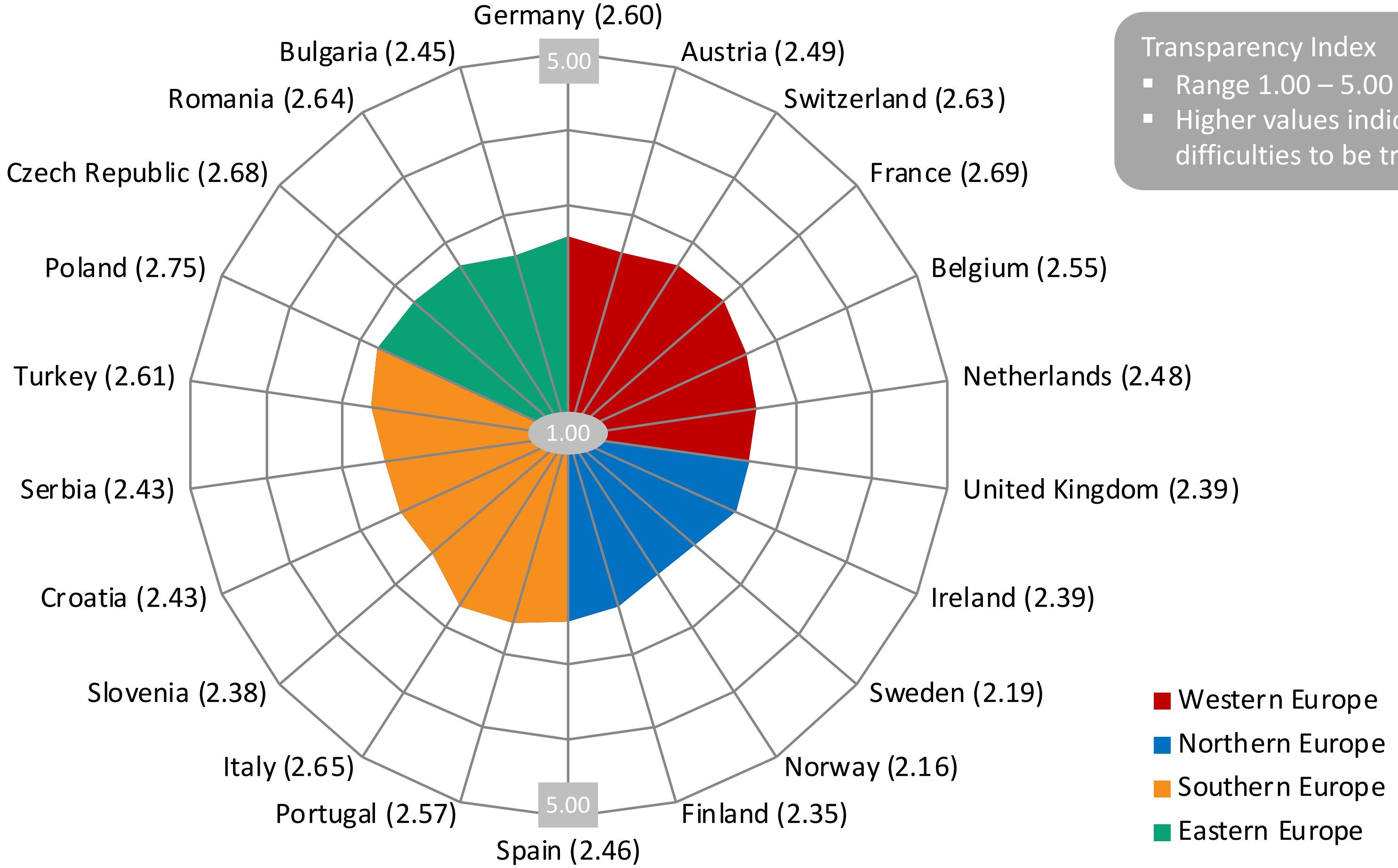
Communication leaders see less difficulties for organisations to be transparent – probably due to information differences between role levels

How difficult it is for organisations to be transparent about relevant topics



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,430 communication professionals. Q 7: Transparency can enhance trust. But some information might not be accessible to communication professionals, and some facts may not be suitable for sharing publicly. How difficult is it for your organisation to be transparent about: … Scale 1 (Not difficult) – 5 (Very difficult). Mean values. ** Highly significant differences (Kendall rank correlation, p ≤ 0.01).
* Significant differences (Kendall rank correlation, p ≤ 0.05).

Transparency index for communications: Organisations from Northern Europe find it less difficult to be transparent



Transparency Index
- Range 1.00 – 5.00
- Higher values indicate more difficulties to be transparent

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,269 communication professionals from 22 countries. Q 7: Transparency can enhance trust. But some information might not be accessible to communication professionals, and some facts may not be suitable for sharing publicly. How difficult is it for your organisation to be transparent about: … Scale 1 (Not difficult) – 5 (Very difficult). Index based on mean values for all 10 items listed on p. 46. Highly significant differences between countries (ANOVA, p ≤ 0.01).

Transparency in communications in Western and Northern Europe

	Political stance of the leader-ship team	Internal processes and work-flows	Top-level strategies	Employees/ members and leadership practices	Impact on society at large	Functional strategies	Governance and culture	Impact on the market, business or sector of society	Products or services	Purpose, mission, and vision
Germany	43.0%	43.0%	26.2%	28.2%	25.5%	24.2%	18.1%	18.1%	8.7%	7.4%
Austria	34.4%	35.9%	29.7%	21.1%	27.3%	17.2%	14.1%	15.6%	9.4%	8.6%
Switzerland	45.8%	38.5%	26.0%	22.9%	29.2%	28.1%	19.8%	21.9%	8.3%	12.5%
France	35.4%	52.3%	32.3%	35.4%	29.2%	32.3%	29.2%	21.5%	12.3%	12.3%
Belgium	44.6%	41.7%	23.2%	23.2%	27.4%	23.8%	25.6%	21.4%	7.7%	7.7%
Netherlands	51.9%	36.3%	19.3%	23.0%	23.7%	17.0%	24.4%	20.0%	11.9%	7.4%
United Kingdom	47.6%	34.5%	15.5%	18.5%	22.6%	17.3%	14.3%	16.7%	10.7%	4.8%
Ireland	35.3%	29.4%	21.6%	35.3%	15.7%	9.8%	19.6%	15.7%	19.6%	11.8%
Sweden	36.6%	22.8%	22.8%	17.8%	9.9%	18.8%	9.9%	6.9%	4.0%	3.0%
Norway	27.4%	28.6%	15.5%	20.2%	10.7%	10.7%	14.3%	11.9%	2.4%	1,.2%
Finland	34.0%	34.0%	13.8%	23.4%	12.8%	16.0%	21.3%	13.8%	8.5%	7.4%

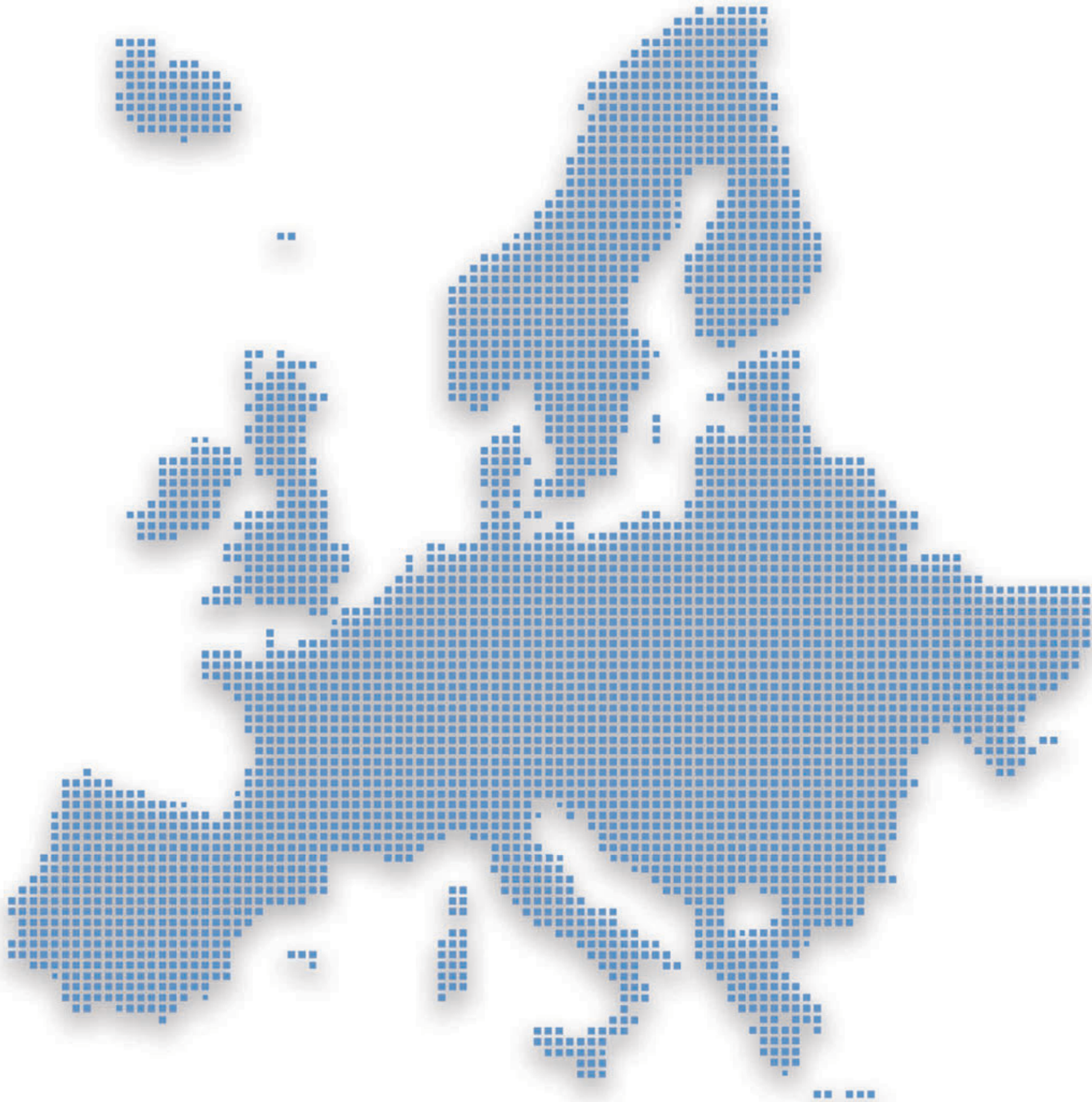
www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,269 communication professionals from 22 countries. Q 7: Transparency can enhance trust. But some information might not be accessible to communication professionals, and some facts may not be suitable for sharing publicly. How difficult is it for your organisation to be transparent about: … Scale 1 (Not difficult) – 5 (Very difficult). Frequency based on scale points 4-5.

Transparency in communications in Southern and Eastern Europe

	Political stance of the leader-ship team	Internal processes and work-flows	Top-level strategies	Employees/ members and leadership practices	Impact on society at large	Functional strategies	Governance and culture	Impact on the market, business or sector of society	Products or services	Purpose, mission, and vision
Spain	45.4%	37.7%	26.9%	26.9%	21.5%	14.6%	21.5%	12.3%	10.0%	4.6%
Portugal	41.3%	32.5%	28.8%	22.5%	25.0%	21.3%	28.8%	18.8%	10.0%	8.8%
Italy	46.2%	39.7%	29.5%	31.4%	23.7%	26.9%	21.8%	17.3%	14.7%	10.3%
Slovenia	36.0%	29.2%	23.6%	23.6%	11.2%	13.5%	13.5%	13.5%	5.6%	7.9%
Croatia	43.0%	29.9%	25.2%	24.3%	18.7%	23.4%	21.5%	17.8%	8.4%	4.7%
Serbia	34.5%	30.1%	24.8%	15.0%	18.6%	21.2%	20.4%	15.0%	8.0%	6.2%
Turkey	55.9%	32.4%	30.9%	19.1%	20.6%	22.1%	23.5%	13.2%	16.2%	7.4%
Poland	45.1%	41.2%	23.5%	29.4%	23.5%	33.3%	31.4%	25.5%	21.6%	9.8%
Czech Republic	44.7%	40.4%	34.0%	23.4%	25.5%	31.9%	14.9%	23.4%	19.1%	12.8%
Romania	36.1%	28.3%	29.8%	22.9%	23.9%	23.4%	24.4%	23.4%	17.6%	14.1%
Bulgaria	36.7%	28.6%	22.4%	18.4%	16.3%	10.2%	12.2%	18.4%	16.3%	6.1%

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,269 communication professionals from 22 countries. Q 7: Transparency can enhance trust. But some information might not be accessible to communication professionals, and some facts may not be suitable for sharing publicly. How difficult is it for your organisation to be transparent about: … Scale 1 (Not difficult) – 5 (Very difficult). Frequency based on scale points 4-5.

Strategic issues for the profession



Chapter overview

One of the key questions in every edition of the European Communication Monitor since 2007 has been the question about what professionals perceive as the most important strategic issues for communication management. Last year, for the first time, trust and building and maintaining it was considered as the most important topic. This year it prolongs its leading position and stays the number one issue for the field until 2022. 37.9 per cent of the respondents picked it as one of the top three issues. The sections about trust and building it in this report can deepen the understanding of this issue and give answers to communication professionals about how to improve trust.

The second most important issue this year, mentioned by 32.5 per cent, is dealing with the speed and volume of information flow, followed closely by exploring new ways of creating and distributing content (31.6 per cent approval). Both topics are new in the top three. They replace the challenges of digitalisation and the social web (last year number three, now number five picked by 29.8 per cent) and linking business strategy and communication (last year's number two and now number eight with only 23.6 per cent approval). This is a remarkable drop since the strategic alignment of communication has been in the top three since 2007 (Tench et al., 2017, pp. 120-123). Apparently, the erosion of trust and the changing media landscape are now experienced as more pressing than goal orientation – or respondents have seen large improvements here during the last months. At the same time, the need to strengthen the role of the communication function in supporting managerial decisions is mentioned as one of the most important issues by 26.5 per cent of the respondents, which is only slightly less than last year (Zerfass et al., 2018, p. 46).

A more detailed analysis reveals some striking differences between countries and types of organisations. Practitioners working in non-profits believe to a much larger extent that enhancing trust, content creation and distribution, and the need to manage more audiences and channels with limited resources is a top issue. Communication professionals working in companies, on the other hand, are much more focused on coping with the rising information flow, digital trends, and social responsibility. Agility is much demanded in governmental organisations, and agencies are strong believers of the use of big data for communications.

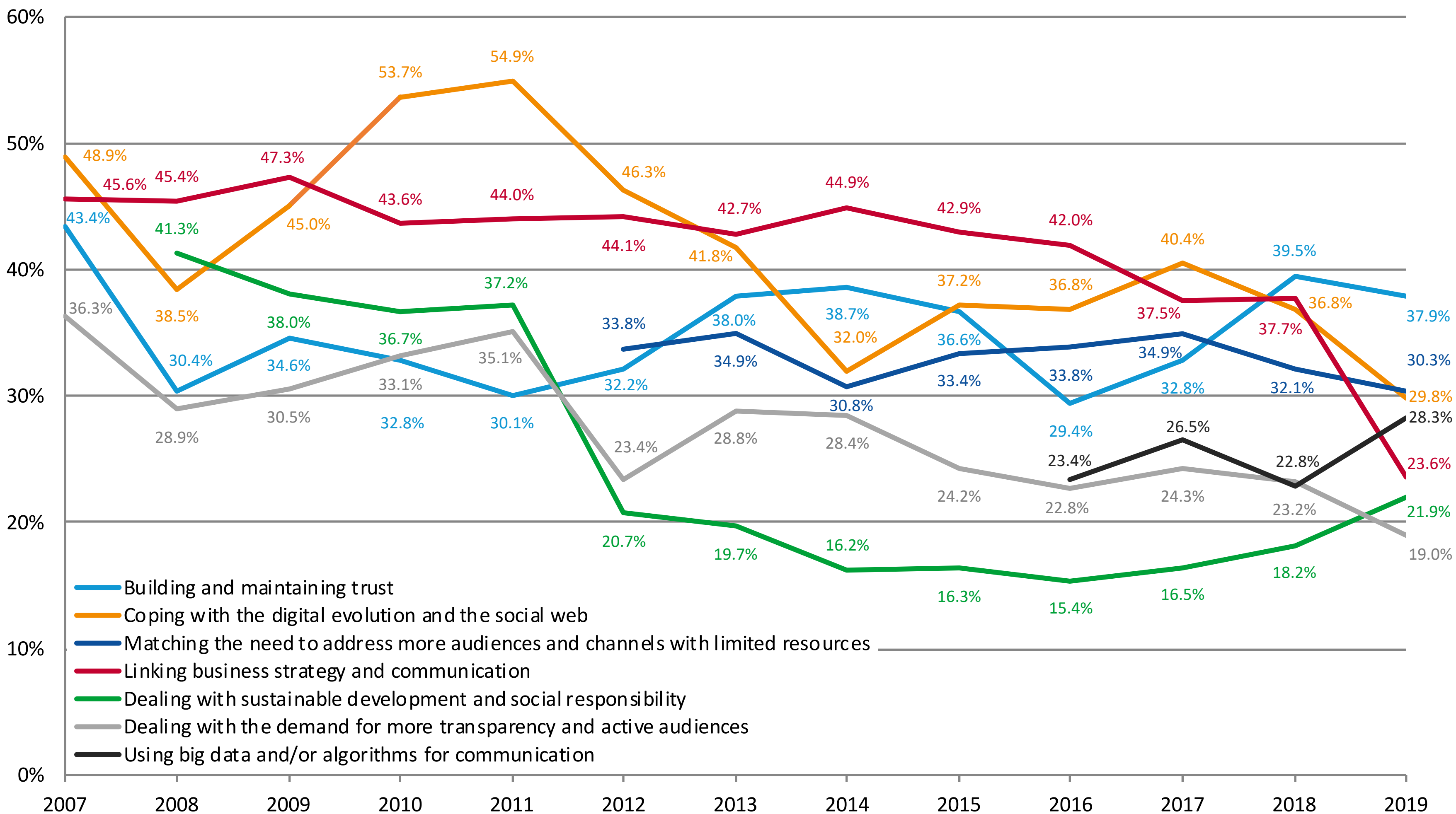
Another interesting insight is the convergence of digital issues that have been rated as a top priority for the profession. Either dealing with the social web (in 2015, 2017, 2018) or with the rising information flow (in 2014, 2016, 2019) were the top digital issue during the last years. However, the use of algorithms and big data is gaining in importance with 28.3 per cent approval in 2019. Overall, all four digital issues in the list have been picked by approximately three out of ten respondents.

The rise of digital challenges and of trust raises the question how both developments are intertwined. Does the new media landscape contribute to less trust in organisations, or can digital communication create opportunities to enhance trust? Concepts like mediatisation, datafication, and strategizing are aspects of excellent communication (Tench et al., 2017) that can help to address this question.

Most important strategic issues for communication management until 2022

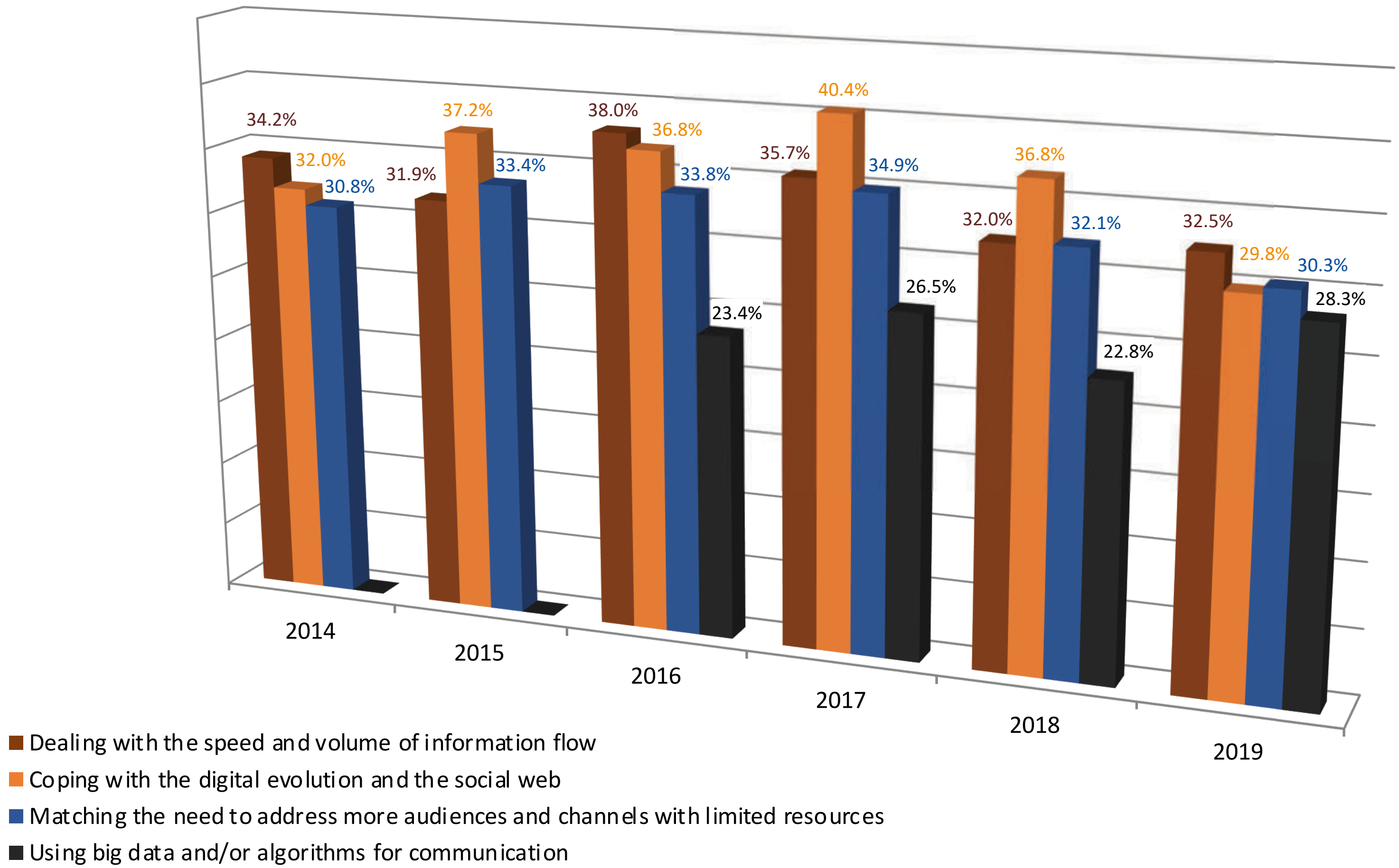
www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals. Q 8: Which issues will be most important for communication management/PR within the next three years from your point of view? Please pick exactly 3 items. Percentages: Frequency based on selection as Top-3 issue.

Long-term development of strategic issues for communication management



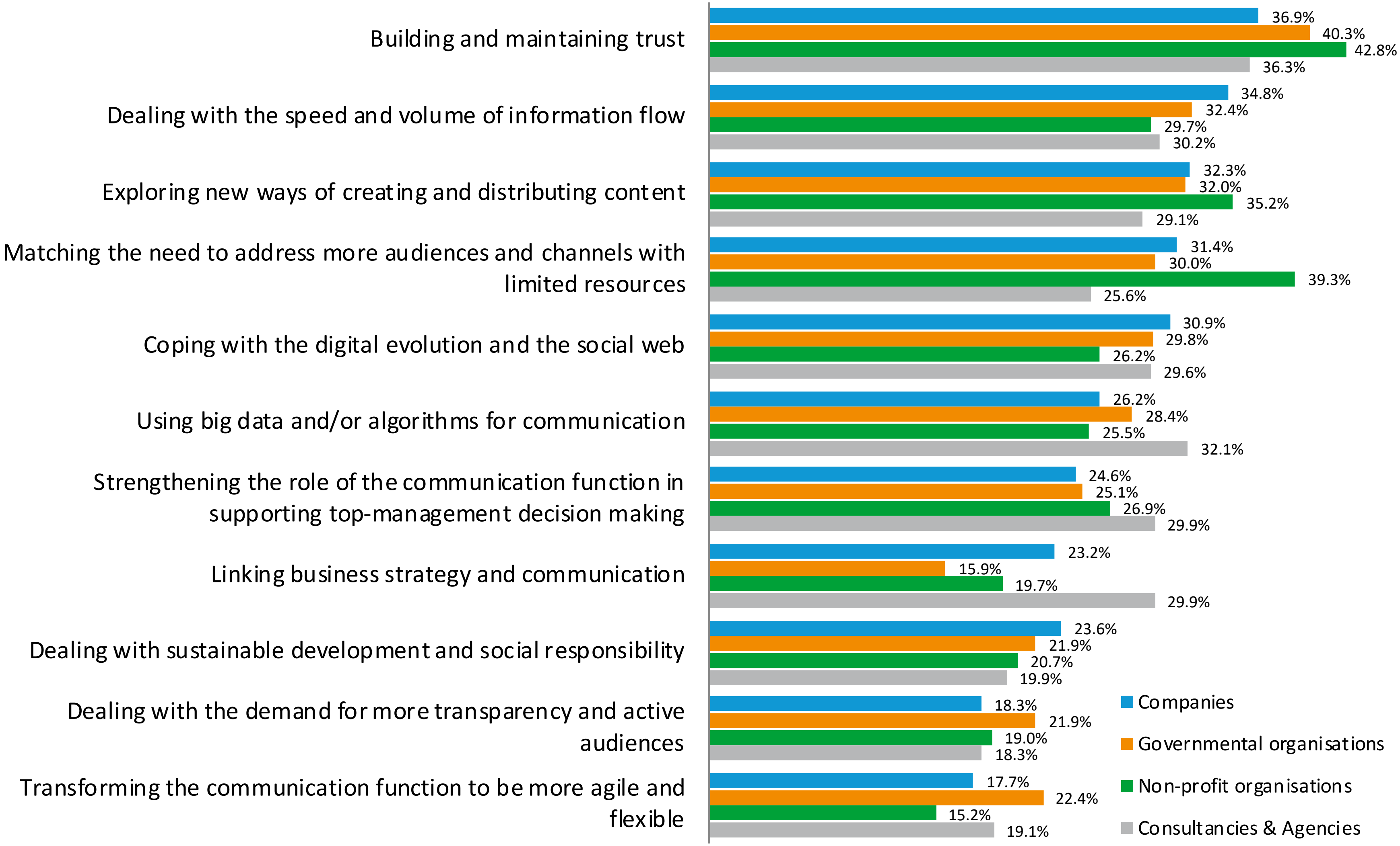
www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals (Q 8) / Zerfass et al. 2018 / n = 3,096 (Q 6); Zerfass et al. 2017 / n = 3,387 (Q 5); Zerfass et al. 2016 / n = 2,710 (Q 9); Zerfass et al. 2015 / n = 2,253 (Q 5); Zerfass et al. 2014 / n = 2,777 (Q 16); Zerfass et al. 2013 / n = 2,710 (Q 6); Zerfass et al. 2012 / n = 2,185 (Q 9); Zerfass et al. 2011 / n = 2,209 (Q 6); Zerfass et al. 2010 / n= 1,955 (Q 7); Zerfass et al. 2009 / n = 1,863 (Q 12); Zerfass et al. 2008 / n = 1,524 (Q 6); Zerfass et al. 2007 / n = 1,087 (Q 6). Q: 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.

Digital challenges rated as a Top-3 issue for communications during the last years



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals (Q 8) / Zerfass et al. 2018 / n = 3,096 (Q 6); Zerfass et al. 2017 / n = 3,387 (Q 5); Zerfass et al. 2016 / n = 2,710 (Q 9); Zerfass et al. 2015 / n = 2,253 (Q 5); Zerfass et al. 2014 / n = 2,777 (Q 16). Q: 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.

Relevance of strategic issues differs between types of organisations



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals. Q 8: 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.

Perceived relevance of strategic issues until 2022 in Western and Northern Europe

	Building and maintaining trust	Dealing with the speed and volume of information flow	Exploring new ways of creating and distributing content	Matching the need to address more audiences and channels with limited resources	Coping with the digital evolution and the social web	Using big data and/or algorithms for communication
Germany	34.2%	36.1%	29.7%	31.0%	25.8%	31.0%
Austria	35.3%	40.4%	30.1%	43.4%	33.1%	25.7%
Switzerland	29.6%	37.8%	33.7%	42.9%	34.7%	27.6%
France	21.2%	36.4%	25.8%	33.3%	34.8%	22.7%
Belgium	33.0%	33.0%	31.3%	38.6%	30.7%	27.8%
Netherlands	43.4%	20.6%	25.0%	23.5%	15.4%	35.3%
United Kingdom	34.5%	33.9%	28.7%	31.6%	31.6%	21.6%
Ireland	42.3%	28.8%	28.8%	26.9%	36.5%	28.8%
Sweden	43.3%	24.0%	22.1%	32.7%	25.0%	24.0%
Norway	32.9%	35.3%	25.9%	30.6%	25.9%	32.9%
Finland	47.9%	26.0%	28.1%	28.1%	20.8%	28.1%

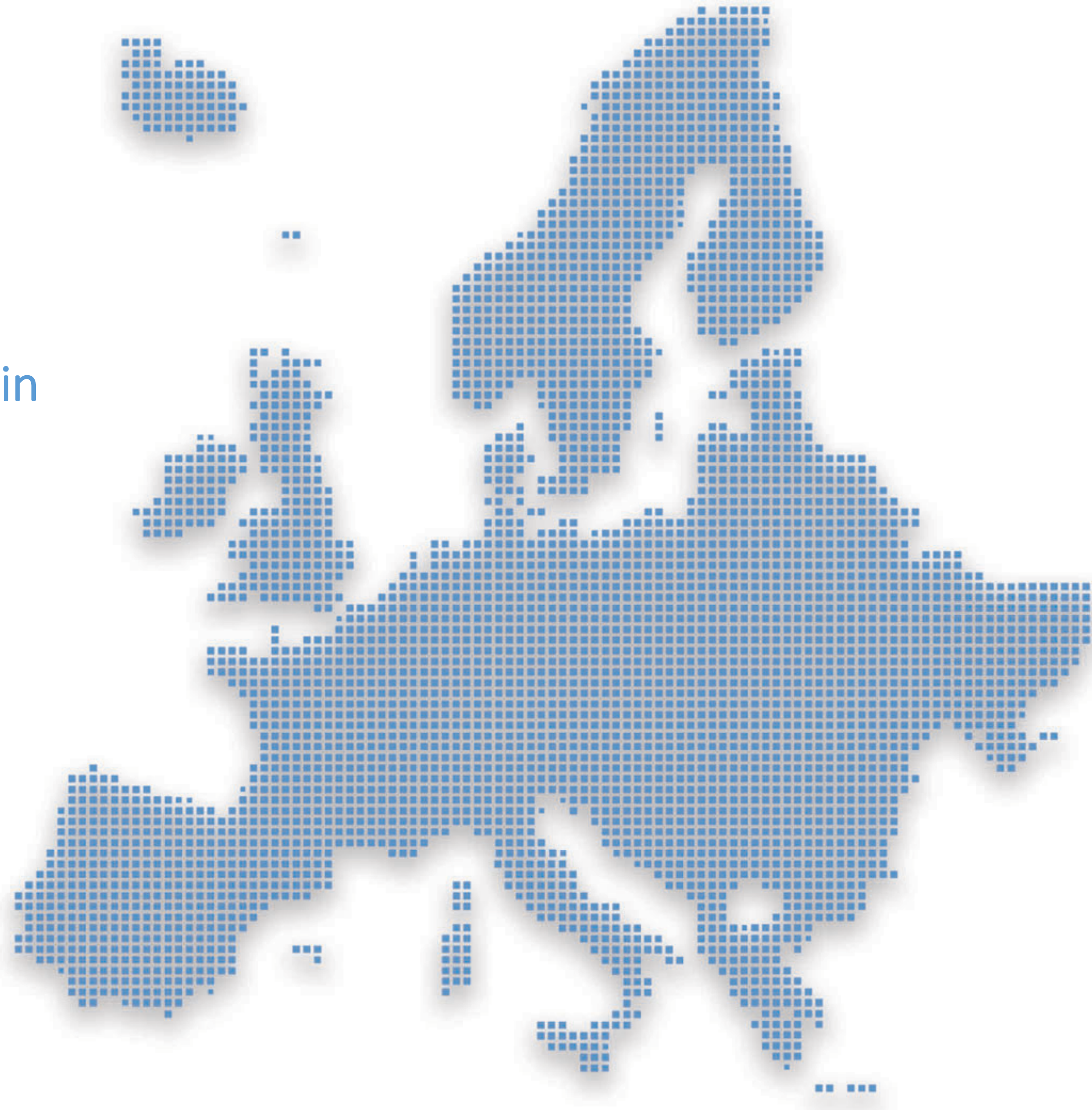
www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,420 communication professionals from 22 countries. Q 8: Which issues will be most important for communication management/PR within the next three years from your point of view? Please pick exactly 3 items. Percentages: Frequency based on selection as Top-3 issue.

Perceived relevance of strategic issues until 2022 in Southern and Eastern Europe

	Building and maintaining trust	Dealing with the speed and volume of information flow	Exploring new ways of creating and distributing content	Matching the need to address more audiences and channels with limited resources	Coping with the digital evolution and the social web	Using big data and/or algorithms for communication
Spain	39.8%	28.6%	29.3%	23.3%	24.1%	33.8%
Portugal	39.5%	38.3%	33.3%	22.2%	28.4%	28.4%
Italy	42.3%	29.8%	35.1%	32.1%	26.2%	23.8%
Slovenia	49.5%	38.5%	34.1%	27.5%	30.8%	23.1%
Croatia	33.3%	30.7%	42.1%	28.1%	28.9%	25.4%
Serbia	34.5%	32.8%	46.2%	30.3%	32.8%	26.1%
Turkey	26.5%	22.1%	39.7%	22.1%	41.2%	52.9%
Poland	37.5%	37.5%	32.1%	14.3%	37.5%	39.3%
Czech Republic	31.3%	39.6%	47.9%	31.3%	31.3%	31.3%
Romania	48.8%	31.3%	31.3%	24.4%	30.0%	24.4%
Bulgaria	38.0%	34.0%	28.0%	32.0%	42.0%	24.0%

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,420 communication professionals from 22 countries. Q 8: 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.

Artificial Intelligence in communications



Chapter overview

Strategic communication is entering a new stage with the introduction of Artificial Intelligence (AI). AI comprises flexible decision-making processes and actions of software-driven agents. They adapt to changing goals and unpredictable situations, learn from experience, and are based on technologies like natural language processing, data retrieval, knowledge representation, semantic reasoning, and machine learning (Makridakis, 2017; Poole & Mackworth, 2017; Russell & Norvig, 2016). Virtual and physical worlds are merging, and we are entering The Fourth Industrial Revolution (Schwab, 2016). This has major implications for the professional communication of organisations, as humans (e.g. communication practitioners) might be replaced or supported by software agents and devices (Gensch, 2019; Galloway & Swiatek, 2018).

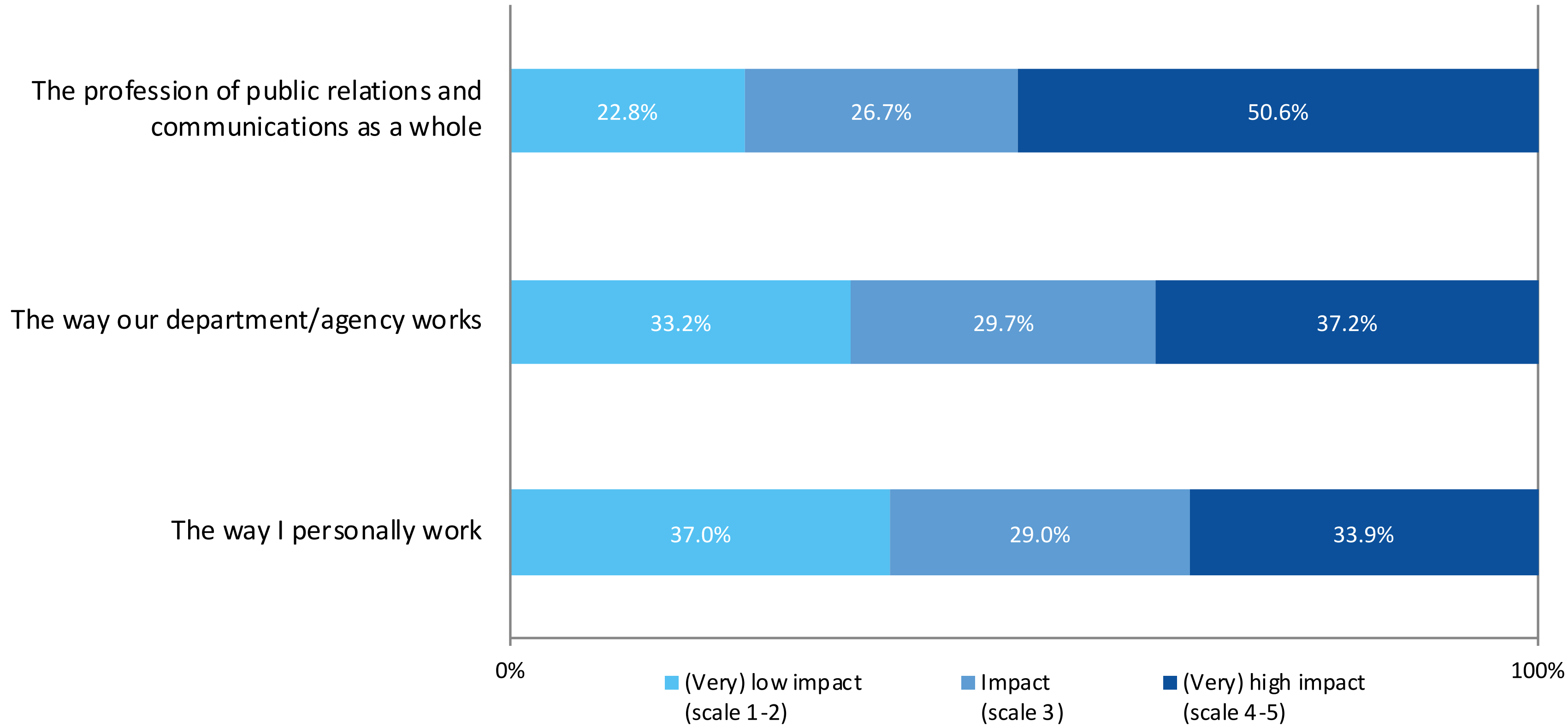
The ECM 2019 is the first large-scale survey to explore the personal adoption, knowledge and perceptions of AI among communication practitioners. Three quarters of the respondents (77.3 per cent) think that AI will change the communication profession as a whole. At the same time, every third respondent believes that the routine work of their department or agency (33.2 per cent) and the individual job (37.0 per cent) will rarely be impacted. The perceived impact differs significantly between countries. Practitioners in Norway, Finland and Bulgaria expect the strongest impact on the departmental level, while their peers in Turkey, Portugal and Serbia fear or hope for more changes of their personal work routines. It is surprising and worrying how few communication professionals in Europe use intelligent assistants or devices at home and in the office today (e.g. Siri, Amazon Echo with Alexa) – only 13.3 per cent. Nevertheless, there is no significant correlation between the personal adoption of AI and the knowledge about the concept. The survey tested whether communication practitioners understand what Artificial Intelligence is about by asking respondents to evaluate eight different statements. Four of them were correct and four incorrect. In total 15.4 per cent of the practitioners have proven to be AI experts by classifying at least seven items properly. The largest portion of experts can be found in Finland, Sweden and Germany.

It is also extremely telling what practitioners see as the most relevant challenges for using AI in communications. 56.2 per cent state that it is difficult to secure competencies of communication practitioners, followed by 54.7 per cent who believe that information technology, budgets or responsibilities (organisational infrastructure) are important hurdles. Surprisingly, only one third (34.8 per cent) thinks that societal infrastructure like highspeed internet or legal rules will be a difficult challenge. The communication profession has obviously a serious problem with human capital in the area of Artificial Intelligence. It is therefore not surprising that practitioners see organisational struggles with varied staff competencies as the major risk associated with the introduction of AI in communications. Surprisingly there is something that can be called an “AI divide” (contrary to the “digital divide”) between generations: communication practitioners in their twenties see the future of AI less positively than older colleagues, as they fear more risks.

An overall assessment of the perceived impact and risk of AI in a two-dimensional space identifies several types of communication practitioners. The largest group expects that AI will impact the profession strongly with low risks (29.2 per cent). At the same time, 14.7 per cent clearly believe in a strong impact and many risks. It will be necessary to track the future development closely, as AI is entering the communication field at a fast pace.

Three out of four communicators believe that AI will change the profession, but 37 per cent state that their daily work will not be affected

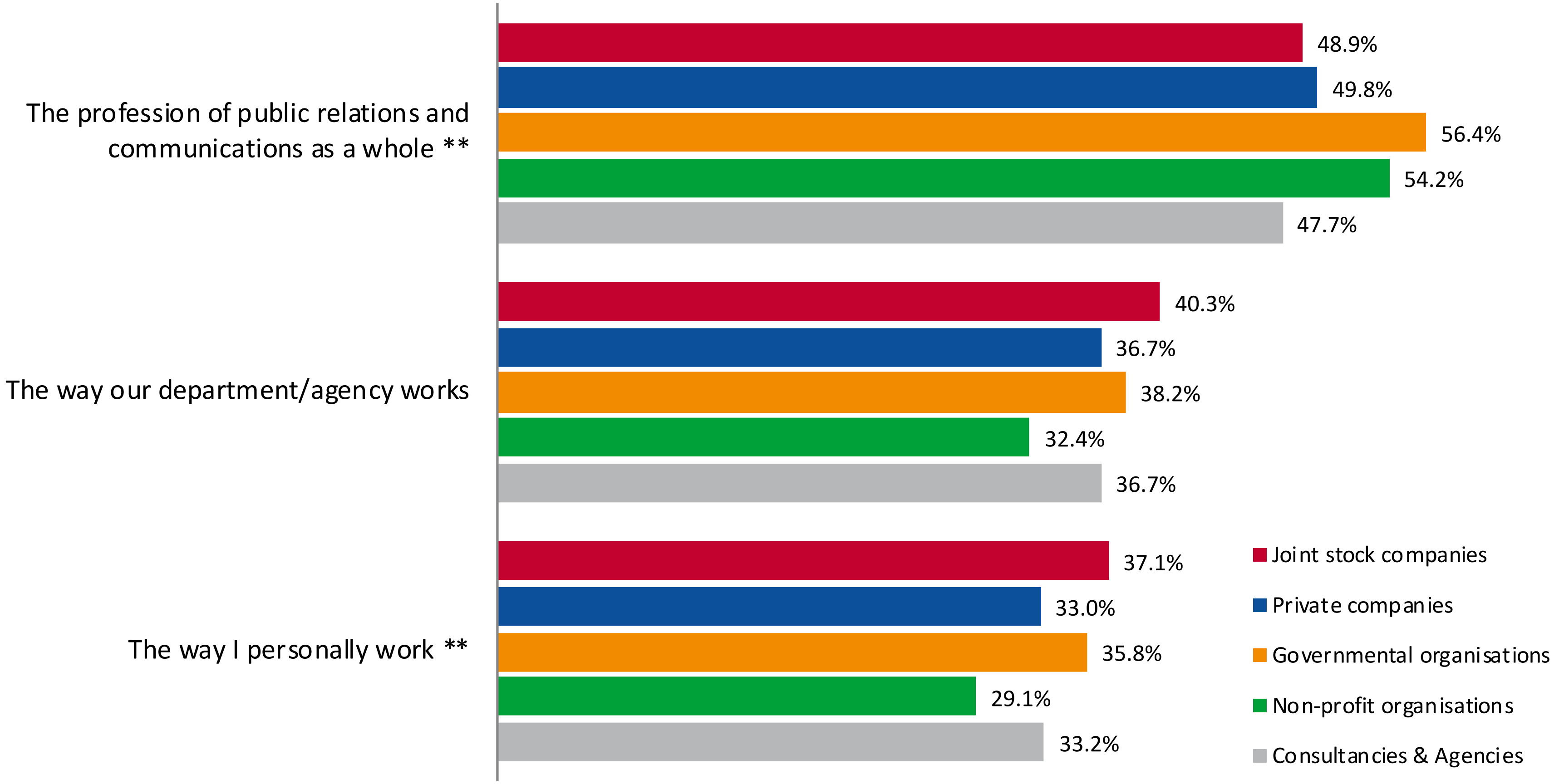
Artificial Intelligence will have impact on ...



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,566 communication professionals. Q 9: Artificial Intelligence is becoming part of everyday life, for example in language-based assistants (Apple Siri, Amazon Alexa) and algorithms used on news sites and e-commerce platforms. This might also impact communications. In your opinion, how much impact will Artificial Intelligence have on ... Scale 1 (Very low impact) – 5 (Very high impact).

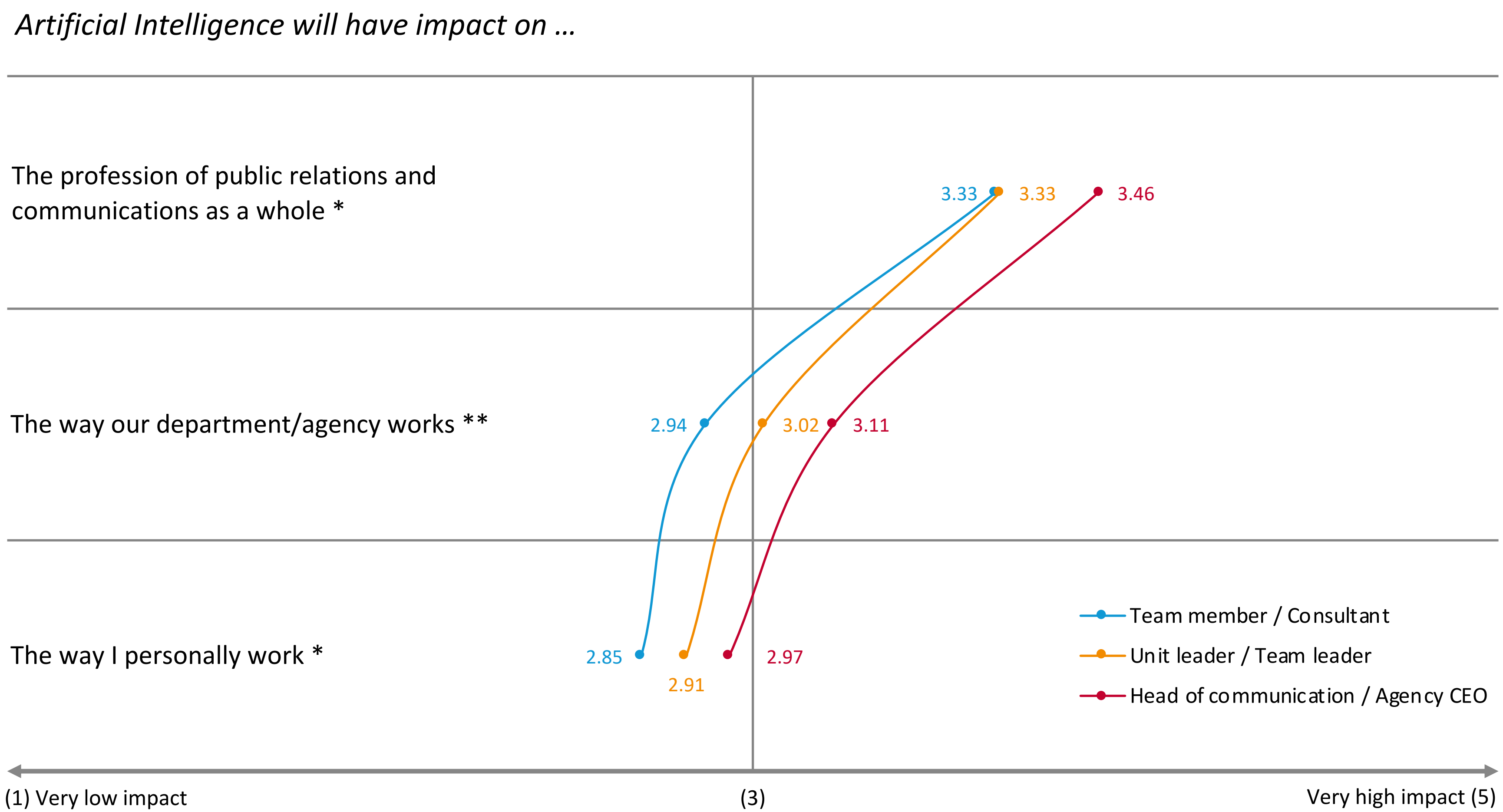
Communication professionals working in joint stock companies expect the strongest impact of AI on organisational and personal practices

Artificial Intelligence will have impact on …



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,566 communication professionals. Q 9: Artificial Intelligence is becoming part of everyday life, for example in language-based assistants (Apple Siri, Amazon Alexa) and algorithms used on news sites and e-commerce platforms. This might also impact communications. In your opinion, how much impact will Artificial Intelligence have on ... Scale 1 (Very low impact) – 5 (Very high impact). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, p ≤ 0.01).

Communication leaders predict a stronger change of communications through AI on the macro, meso and micro level than unit leaders and team members



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,405 communication professionals. Q 9: Artificial Intelligence is becoming part of everyday life, for example in language-based assistants (Apple Siri, Amazon Alexa) and algorithms used on news sites and e-commerce platforms. This might also impact communications. In your opinion, how much impact will Artificial Intelligence have on ... Scale 1 (Very low impact) – 5 (Very high impact). Mean values.
** Highly significant differences (Kendall rank correlation, p ≤ 0.01). * Significant differences (Kendall rank correlation, p ≤ 0.05).

Perceived impact of Artificial Intelligence across Europe

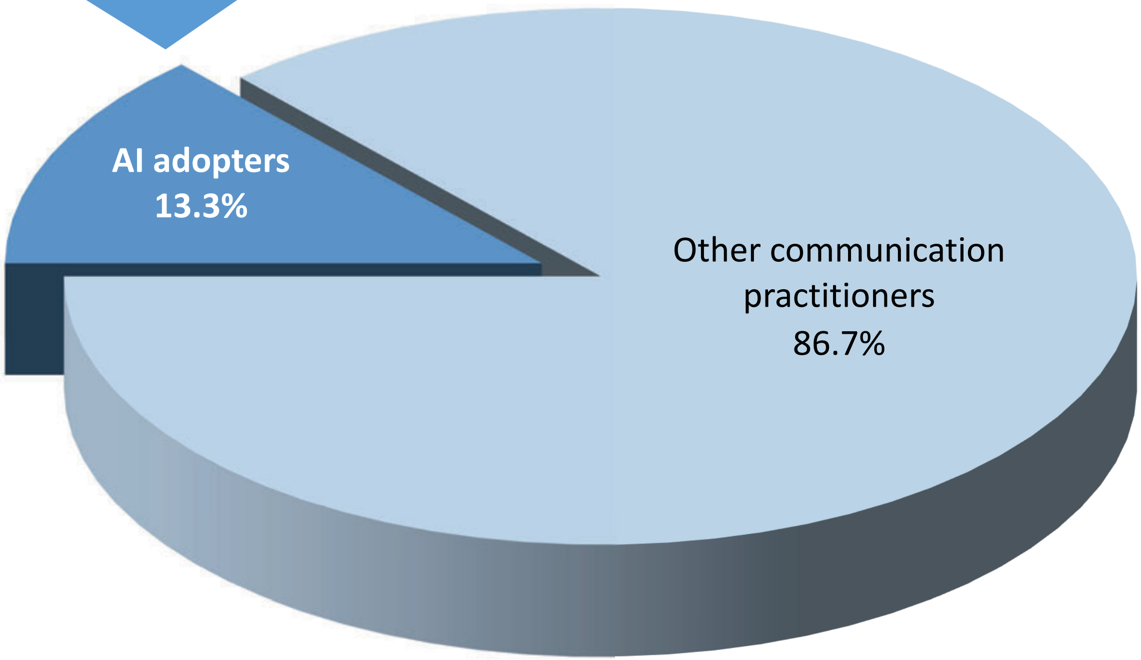
	The profession of public relations and communication as a whole	The way our department/ agency works **	The way I personally work **		The profession of public relations and communication as a whole	The way our department/ agency works **	The way I personally work **
Germany	51.0%	38.3%	37.6%	Spain	48.8%	41.7%	37.0%
Austria	41.9%	34.9%	28.7%	Portugal	59.0%	42.3%	42.3%
Switzerland	49.0%	29.2%	29.2%	Italy	45.1%	41.4%	34.0%
France	49.2%	36.9%	36.9%	Slovenia	41.4%	35.6%	31.0%
Belgium	55.8%	36.4%	32.1%	Croatia	40.7%	32.4%	34.3%
Netherlands	60.2%	44.4%	37.6%	Serbia	49.1%	35.5%	40.0%
United Kingdom	54.9%	35.8%	34.0%	Turkey	50.0%	43.9%	42.4%
Ireland	46.9%	32.7%	26.5%	Poland	45.3%	18.9%	18.9%
Sweden	49.5%	32.0%	30.9%	Czech Republic	42.6%	29.8%	21.3%
Norway	63.9%	48.2%	34.9%	Romania	54.2%	44.8%	37.9%
Finland	65.6%	46.2%	38.7%	Bulgaria	50.0%	47.9%	39.6%

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,310 communication professionals from 22 countries. Q 9: Artificial Intelligence is becoming part of everyday life, for example in language-based assistants (Apple Siri, Amazon Alexa) and algorithms used on news sites and e-commerce platforms. This might also impact communications. In your opinion, how much impact will Artificial Intelligence have on ... Scale 1 (Very low impact) – 5 (Very high impact). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, p ≤ 0.01).

Personal experiences with AI among communication professionals in Europe: Only a minority is already using intelligent assistants or devices

AI adopters

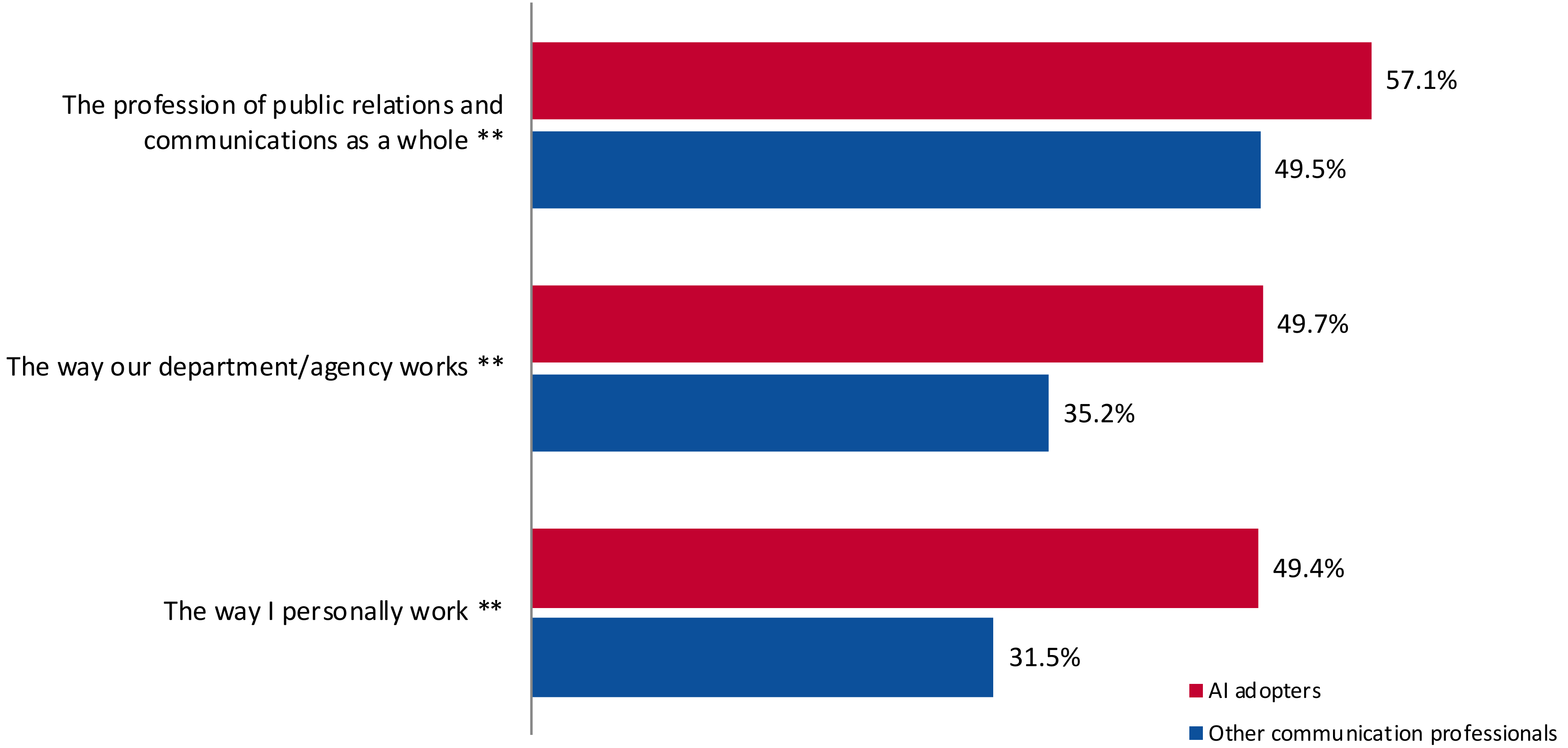
Communication practitioners using
- intelligent assistants on their smartphones and
- intelligent devices in their home or office



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals. Q 29: Do you use intelligent assistants on your smartphone (e.g. Siri, Google Assistant)? Yes / No / I don’t know/not available to me. Q 30: Do you use intelligent devices in your home or office (e.g. Amazon Echo with Alexa, Google Home, Apple HomePod)? Yes / No / I don’t know/not available to me.

AI adopters expect significantly higher overall impact on all operational levels compared to peers that do not use intelligent assistants and devices

Artificial Intelligence will have impact on …



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,566 communication professionals. Q 9: Artificial Intelligence is becoming part of everyday life, for example in language-based assistants (Apple Siri, Amazon Alexa) and algorithms used on news sites and e-commerce platforms. This might also impact communications. In your opinion, how much impact will Artificial Intelligence have on ... Scale 1 (Very low impact) – 5 (Very high impact). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, p ≤ 0.01).

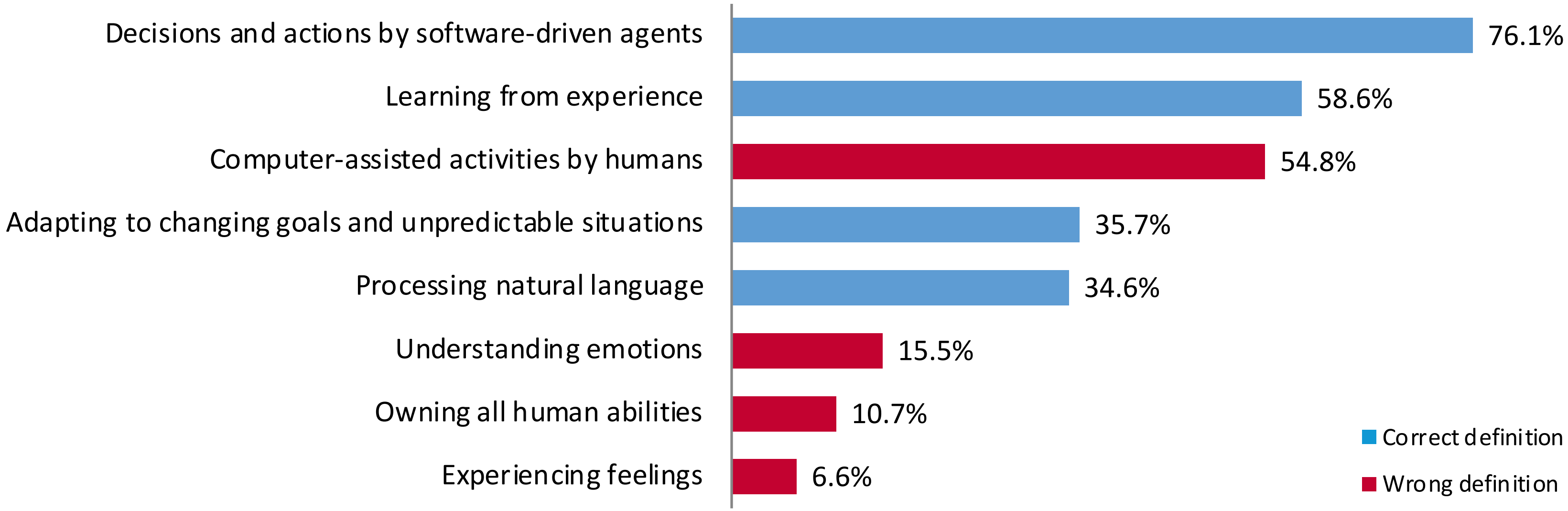
Personal knowledge about AI among communication professionals: A small portion can be considered experts in the field

15.4% AI experts
- Communicators surveyed that have classified at least seven defining elements correctly

7.1% AI greenhorns
- Communicators surveyed that have skipped this question or the whole AI topic

AI adoption and AI expertise
- No significant correlation
- 13.7% of early adopters are experts
- 15.7% of other practitioners are experts

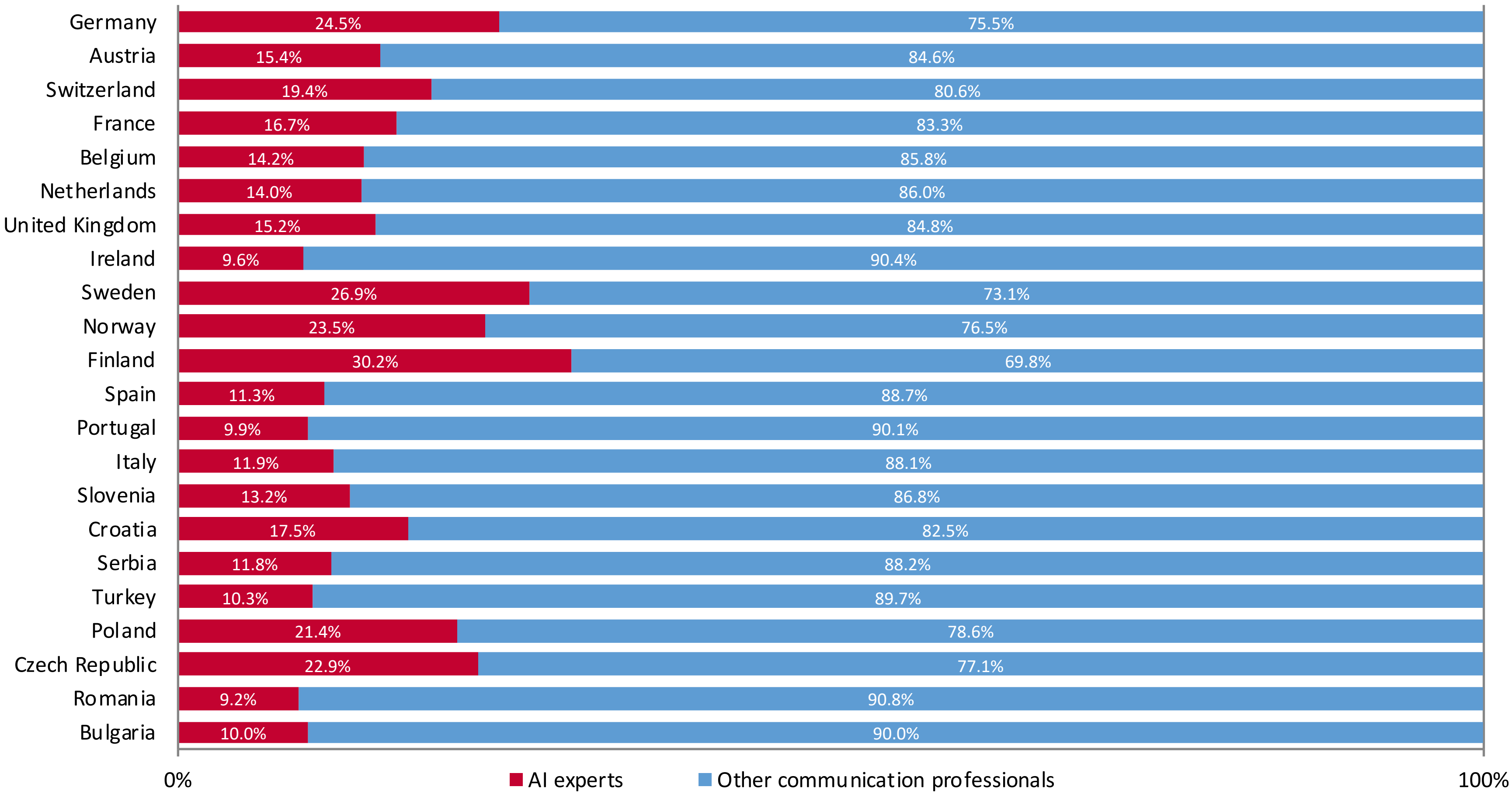
How communication professionals define Artificial Intelligence



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,498 communication professionals. Q 10: The term "Artificial Intelligence" is characterised in various ways. Please pick all definitions which you think are appropriate. Artificial Intelligence refers to ... Percentages: Frequency based on selection. AI Experts: 15.4% of the overall sample and 16.6% of those who have selected definitions. The largest portion (38.6%) has classified 5 of 8 items correctly.

AI experts among communication professionals in key countries

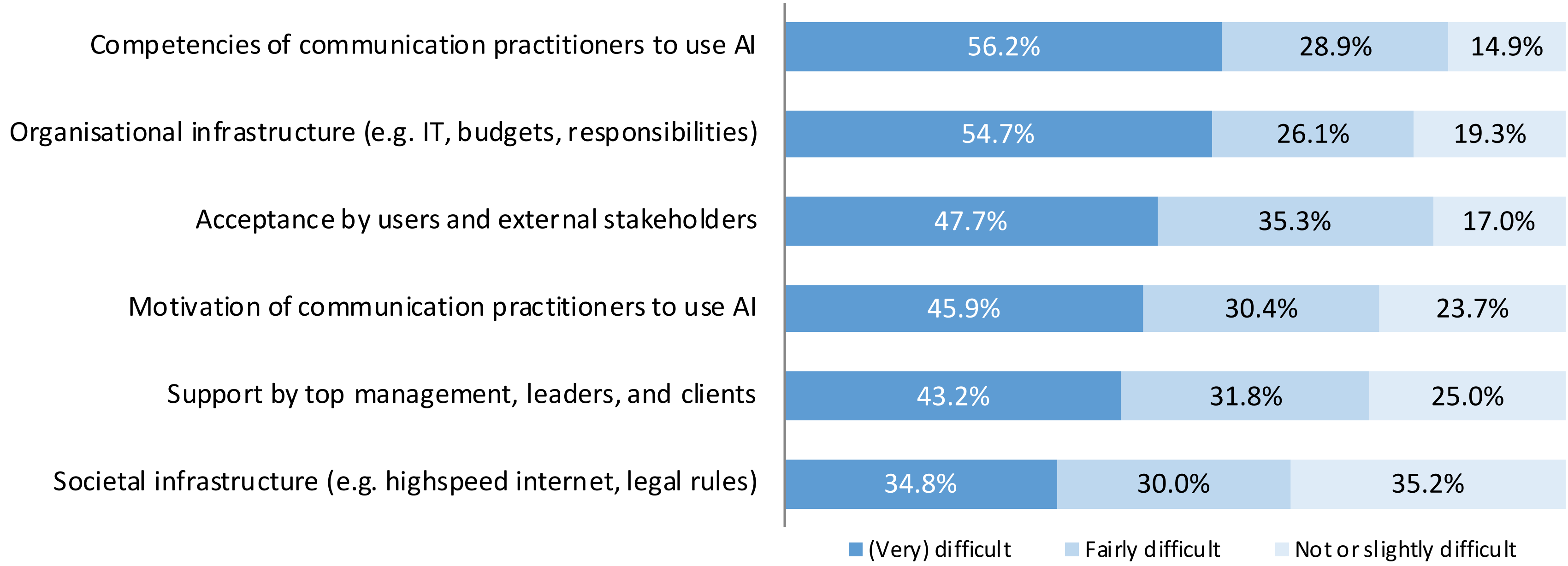
Experts are identified based on their personal knowledge about Artificial Intelligence



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,420 communication professionals from 22 countries. Q 10: The term “Artificial Intelligence” is characterised in various ways. Please pick all definitions which you think are appropriate. AI Experts are communicators surveyed that have classified at least seven defining elements correctly; see page 68 for details.

Challenges for implementing AI in communications

How difficult is it to secure the following requirements for using AI in communications?

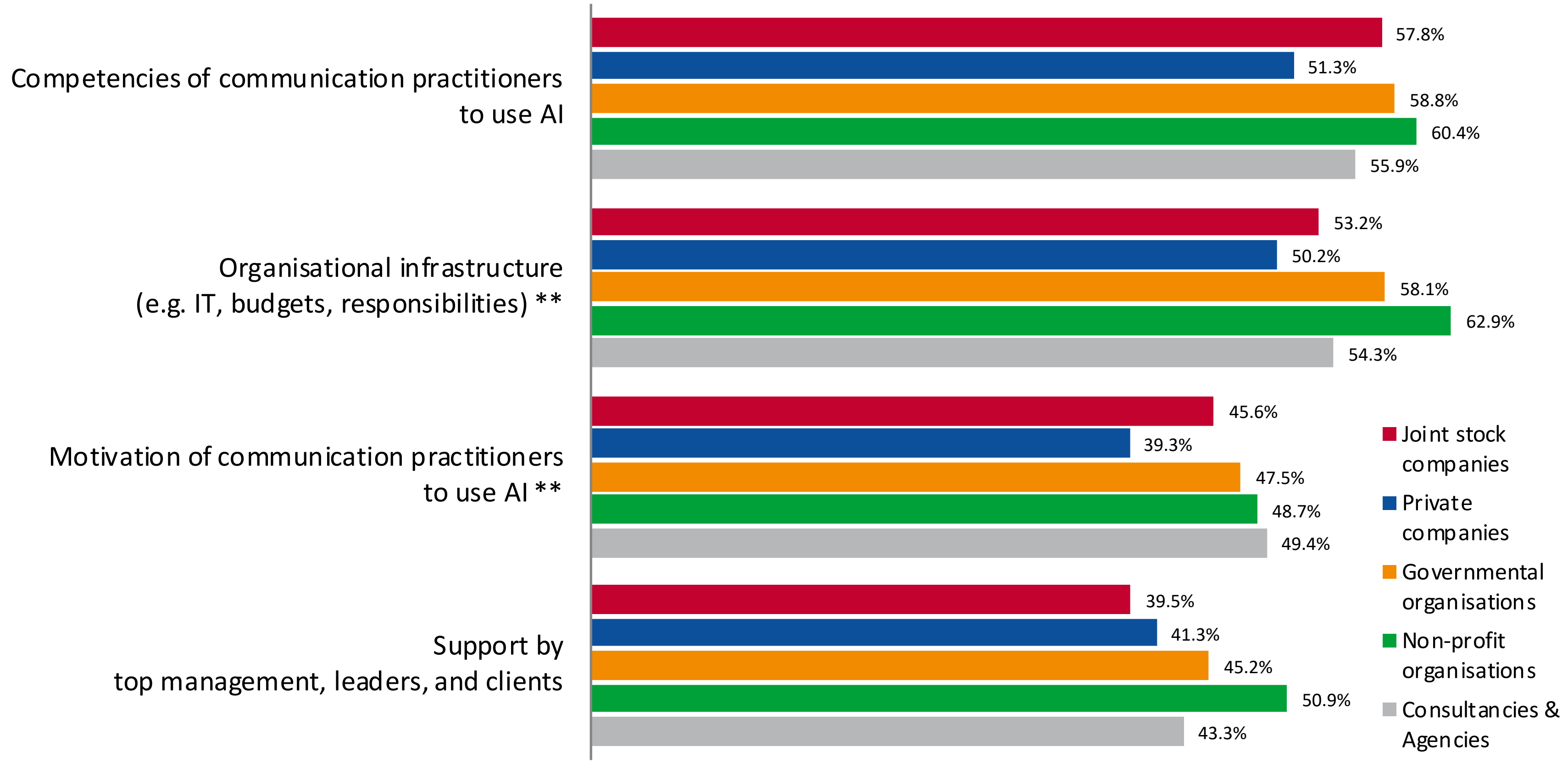


Artificial Intelligence (AI)
= flexible decision-making processes and actions of software-driven agents.
They adapt to changing goals and unpredictable situations, learn from experience, and are based on technologies like natural language processing, data retrieval and knowledge representation, semantic reasoning, and machine learning.

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,566 communication professionals. Q 11: Artificial Intelligence (AI) can be described as flexible decision-making processes and actions of software-driven agents. They adapt to changing goals and unpredictable situations, learn from experience, and are based on technologies like natural language processing, data retrieval and knowledge representation, semantic reasoning, and machine learning.
Taking this definition into account and thinking of your organisation, how difficult is it to secure the following requirements for using AI in communications? Scale 1 (Not difficult) – 5 (Very difficult). Frequency based on scale points 1-2 (not or slightly difficult), 3 (fairly difficult), 4-5 (difficult or very difficult).

Non-profits rate organisational challenges for implementing AI higher; motivation of practitioners is a strong concern in agencies

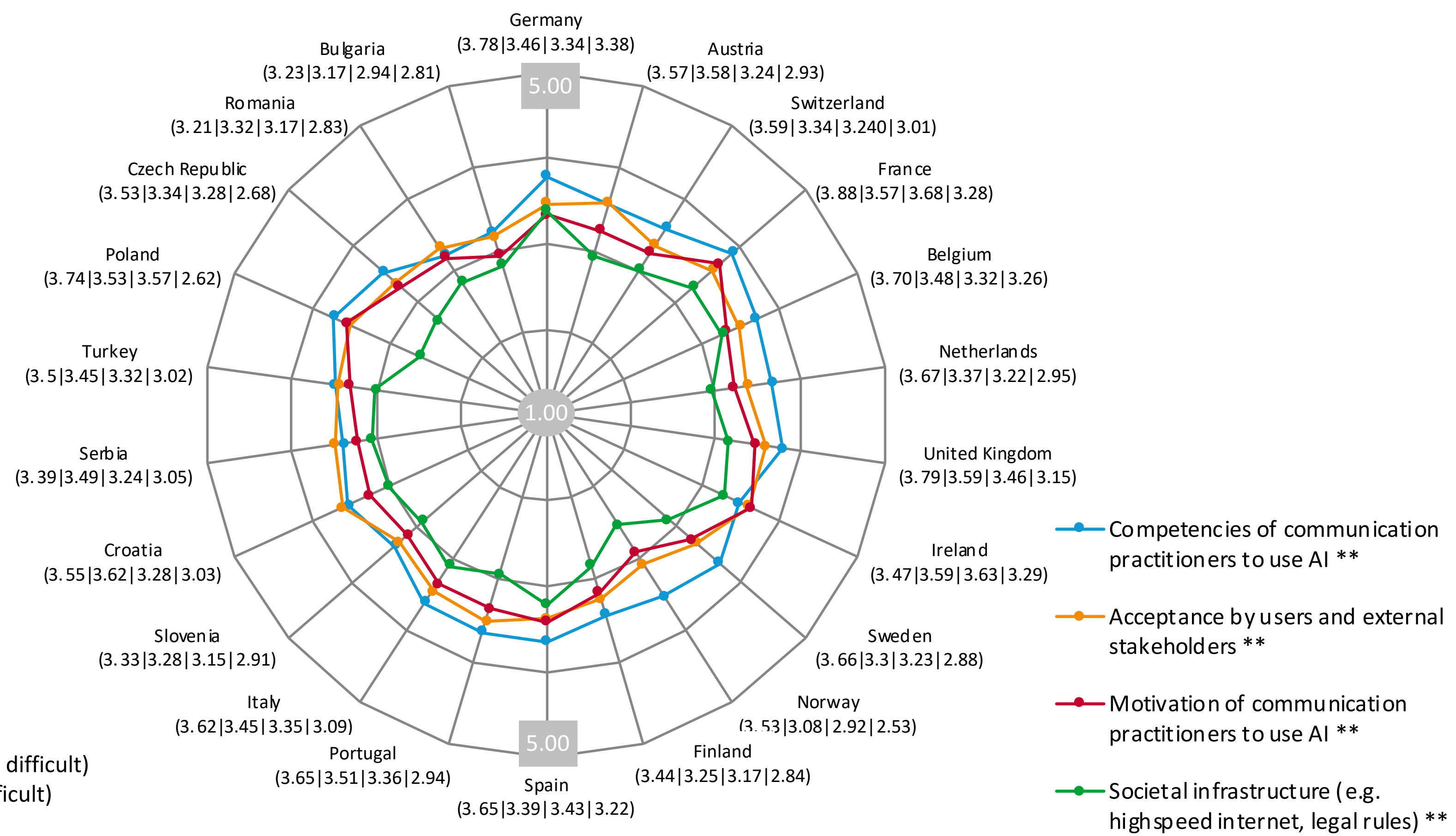
Perceived difficulty to secure the following requirements for using Artificial Intelligence



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,566 communication professionals. Q 11: Artificial Intelligence (AI) can be described as flexible decision-making processes and actions of software-driven agents. They adapt to changing goals and unpredictable situations, learn from experience, and are based on technologies like natural language processing, data retrieval and knowledge representation, semantic reasoning, and machine learning. Taking this definition into account and thinking of your organisation, how difficult is it to secure the following requirements for using AI in communications? Scale 1 (Not difficult) – 5 (Very difficult). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, p ≤ 0.01).

Challenges for implementing AI in communications across Europe

Perceived difficulty to secure the following requirements for using Artificial Intelligence

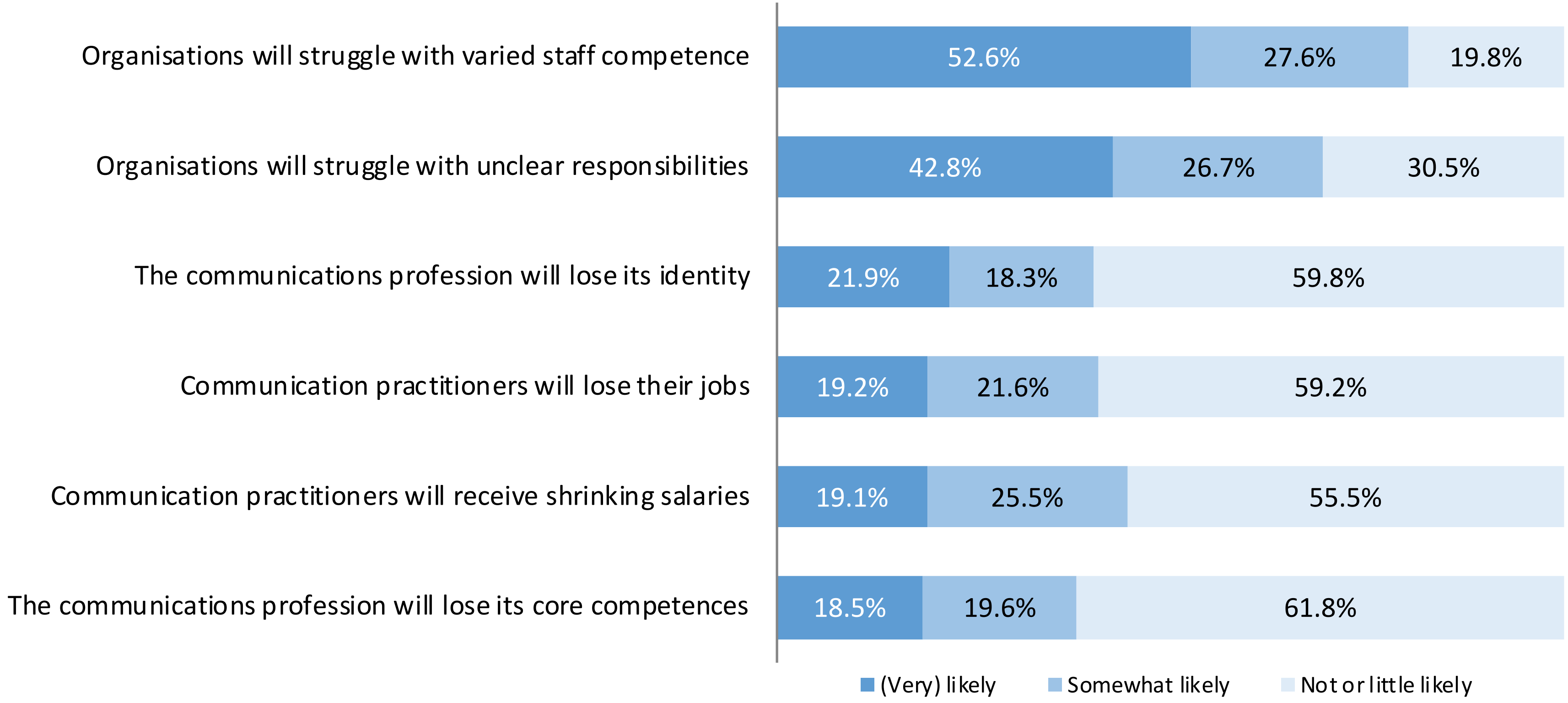


Scale: 1 (Not difficult) – 5 (Very difficult)

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,566 communication professionals. Q 11: Artificial Intelligence (AI) can be described as flexible decision-making processes and actions of software-driven agents. They adapt to changing goals and unpredictable situations, learn from experience, and are based on technologies like natural language processing, data retrieval and knowledge representation, semantic reasoning, and machine learning. Taking this definition into account and thinking of your organisation, how difficult is it to secure the following requirements for using AI in communications? Scale 1 (Not difficult) – 5 (Very difficult). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01).

Risks of Artificial Intelligence for the communications profession

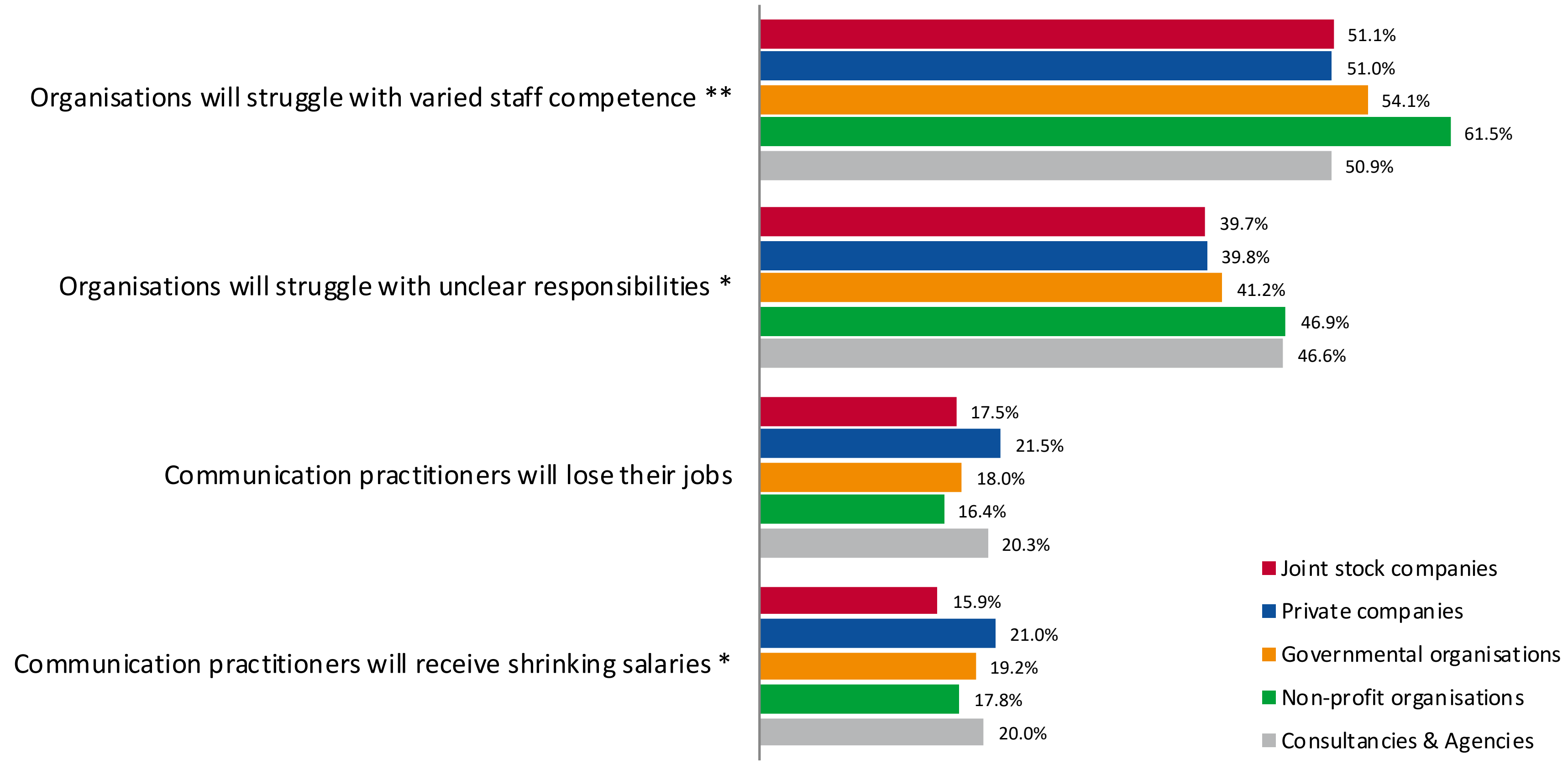
What could be possible risks that AI brings to communications?



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,566 communication professionals. Q 12: What could be possible risks that Artificial Intelligence brings to communications? Scale 1 (Not likely) – 5 (Very likely). Frequency based on scale points 4-5.

Assessment of risks on the organisational and personal level differs between various types of organisations

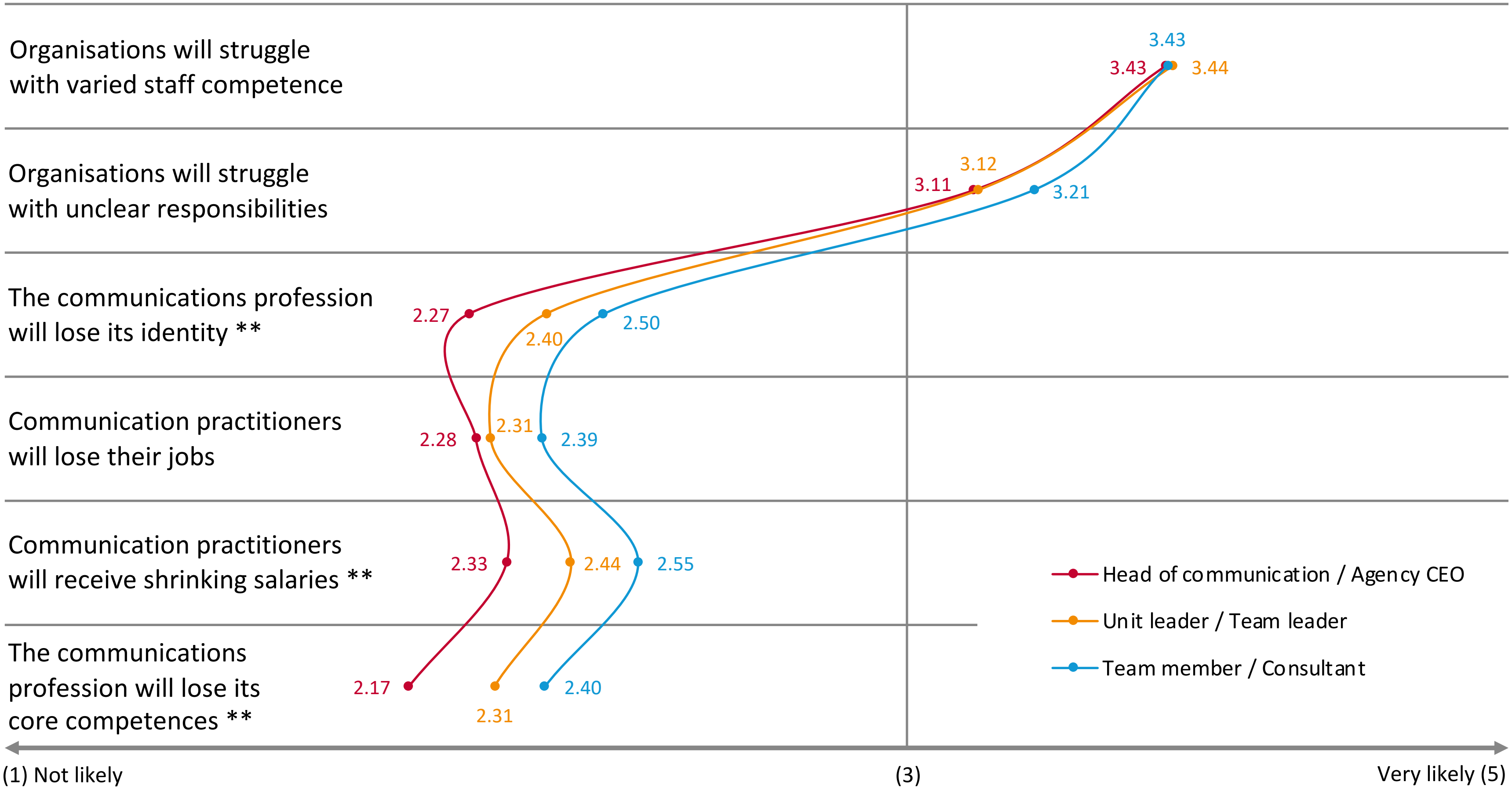
Perceived likeliness of risks induced by Artificial Intelligence



 n = 2,566 communication professionals. Q 12: What could be possible risks that Artificial Intelligence brings to communications? Scale 1 (Not likely) – 5 (Very likely). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, p ≤ 0.01). * Significant differences (chi-square test, p ≤ 0.05).

Team members and consultants are more pessimistic than communication leaders

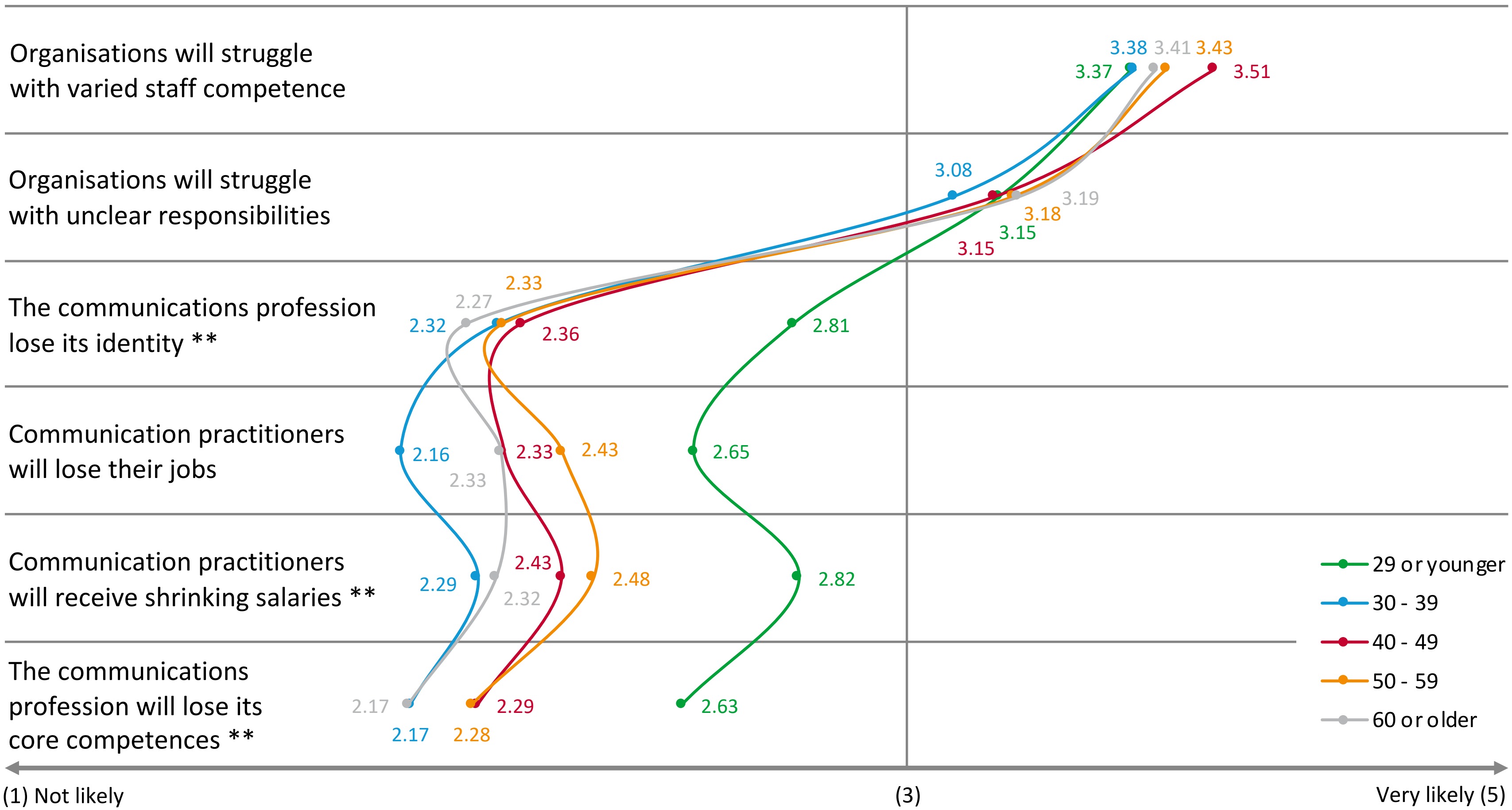
Risks for communications induced by Artificial Intelligence



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,405 communication professionals. Q 12: What could be possible risks that Artificial Intelligence brings to communications? Scale 1 (Not likely) – 5 (Very likely). Mean values. ** Highly significant differences (Kendall rank correlation, p ≤ 0.01).

Anticipation of AI-induced risks across practitioner generations: Striking differences between young professionals in their 20s and 30s

Risks for communications induced by Artificial Intelligence



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,566 communication professionals. Q 12: What could be possible risks that Artificial Intelligence brings to communications? Scale 1 (Not likely) – 5 (Very likely). Mean values. ** Highly significant differences (Pearson correlation, p ≤ 0.01).

Likeliness of AI-induced risks for communications in Western and Northern Europe

	Organisations will struggle with varied staff competence	Organisations will struggle with unclear responsibilities	The communications profession will lose its identity	Communication practitioners will lose their jobs	Communication practitioners will receive shrinking salaries	The communications profession will lose its core competences
Germany	61.7%	38.3%	19.5%	19.5%	18.8%	20.1%
Austria	51.2%	44.2%	19.4%	18.6%	18.6%	16.3%
Switzerland	57.3%	43.8%	12.5%	13.5%	10.4%	7.3%
France	58.5%	49.2%	10.8%	10.8%	13.8%	18.5%
Belgium	60.6%	49.1%	15.8%	12.1%	9.1%	14.5%
Netherlands	57.9%	36.1%	9.0%	9.8%	2.3%	10.5%
United Kingdom	54.3%	45.1%	17.9%	27.2%	16.7%	14.8%
Ireland	53.1%	49.0%	18.4%	30.6%	28.6%	18.4%
Sweden	60.8%	43.3%	12.4%	21.6%	14.4%	11.3%
Norway	61.4%	27.7%	12.0%	16.9%	7.2%	8.4%
Finland	67.7%	43.0%	11.8%	9.7%	8.6%	9.7%

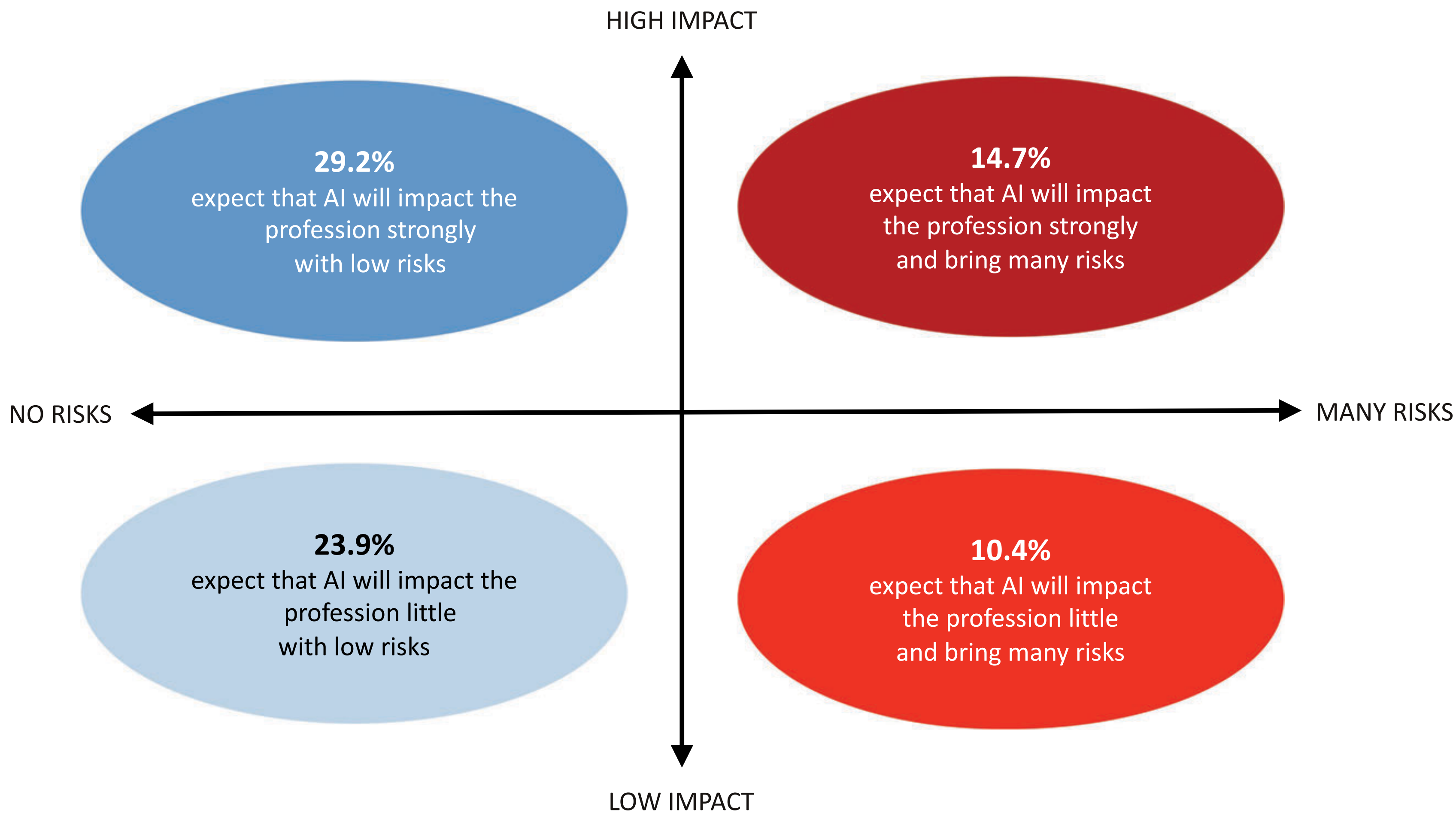
www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,566 communication professionals. Q 12: What could be possible risks that Artificial Intelligence brings to communications? Scale 1 (Not likely) – 5 (Very likely).). Frequency based on scale points 4-5.

Likeliness of AI-induced risks for communications in Southern and Eastern Europe

	Organisations will struggle with varied staff competence	Organisations will struggle with unclear responsibilities	The communications profession will lose its identity	Communication practitioners will lose their jobs	Communication practitioners will receive shrinking salaries	The communications profession will lose its core competences
Spain	45.7%	43.3%	23.6%	16.5%	31.5%	19.7%
Portugal	52.6%	48.7%	24.4%	24.4%	32.1%	19.2%
Italy	45.7%	44.4%	24.1%	16.0%	19.8%	22.2%
Slovenia	47.1%	39.1%	18.4%	10.3%	14.9%	16.1%
Croatia	50.0%	42.6%	23.1%	17.6%	21.3%	16.7%
Serbia	47.3%	45.5%	34.5%	20.9%	30.0%	28.2%
Turkey	37.9%	48.5%	34.8%	24.2%	25.8%	22.7%
Poland	58.5%	47.2%	32.1%	24.5%	20.8%	22.6%
Czech Republic	38.3%	44.7%	38.3%	19.1%	8.5%	12.8%
Romania	39.9%	40.4%	36.5%	33.5%	35.0%	32.0%
Bulgaria	50.0%	47.9%	35.4%	22.9%	29.2%	35.4%

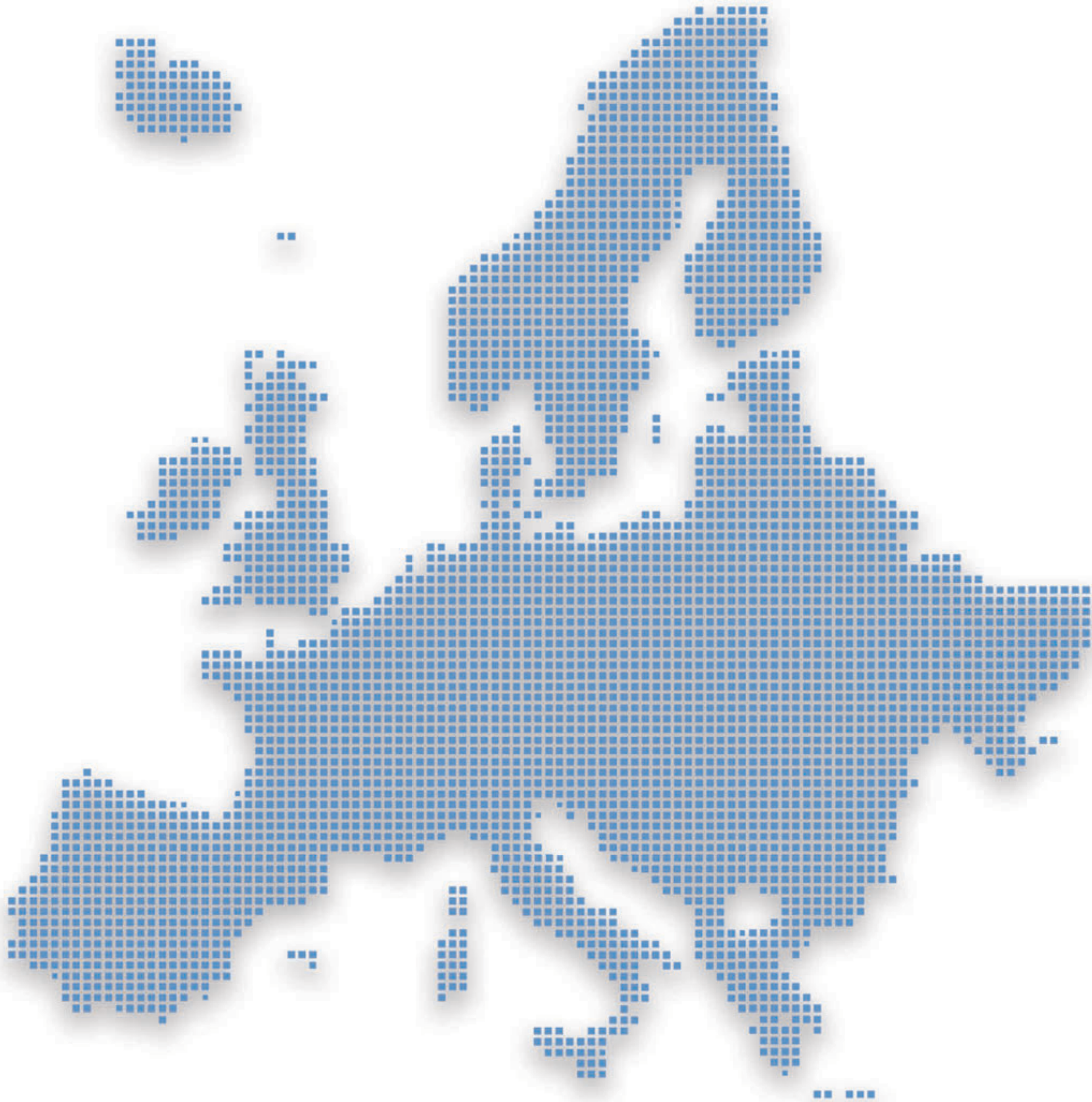
www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,566 communication professionals. Q 12: What could be possible risks that Artificial Intelligence brings to communications? Scale 1 (Not likely) – 5 (Very likely).). Frequency based on scale points 4-5.

Overall assessment of Artificial Intelligence: One out of seven communication practitioners expects strong impacts with many risks



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,566 communication professionals. Analysis based on combining the index of all Q9 items (perceived impact of Artificial Intelligence) and the index of all Q12 items (risks associated with Artificial Intelligence): Low impact (Q9 index value < 3), neutral impact (Q9 index value = 3), high impact (Q9 index value > 3); no/few risks (Q12 index value < 3), neutral risks (Q12 index value = 3), many risks (Q12 index value > 3). Overall 9 groups were identified. 4 groups with highest values are shown. Additional groups: 8.7% (neutral impact, few risks), 5.2% (neutral impact, many risks), 3.4% (high impact, neutral on risks), 2.7% (low impact, neutral on risks), 1.8% (neutral impact, neutral on risks).

Content creation and distribution



Chapter overview

The profound transformation of public communication through technological and social innovations has changed the role of companies, non-profits and governmental organisations. They are no longer just providers of information for journalists and mass media, but they have become content producers and distributors on their own (Brito, 2013; Verčič & Tkalac Verčič, 2016). The PESO concept (Burcher, 2012; Dietrich, 2018; Macnamara et al., 2016) analyses this trend by distinguishing paid, earned, shared and owned media as complementary approaches to distribute content and influence stakeholders. The 2015 edition of the European Communication Monitor asked respondents about how they predicted the future importance of these approaches (Zerfass et al., 2015, pp. 16-25). Every second respondent stated that earned media (content sharing, press relations) and owned media will gain in importance while one third predicted a loss of importance for paid media.

The results of the ECM 2019 survey confirm this trend: 57.9 per cent of communication practitioners across Europe confirm a rising importance of earned media during the last three years. 54.1 per cent have experienced the same for owned media (content published on platforms controlled by the organisation). The clear winner, however, is shared media: 77.5 per cent of the respondents state that content published on social media platforms by supporters of any kind, e.g. followers, fans, members, employees, or representatives of the organisation, have gained in importance. There are differing views, however, about paid media, i.e. published content commercially contracted between organisations and mass/digital media or influencers. 37.6 per cent of the practitioners think this approach has gained in importance, while 36.1 per cent believe it has lost, and 26.3 per cent see no changes.

This might be explained by two contrary developments: overall advertising spending is still rising, but there is a clear shift from TV and print outlets to digital channels (Dentsu Aegis Network, 2019). The ECM 2019 confirms this trend: sponsored social media content is used by every second communication department in Europe (53.1 per cent). Sponsoring content on mass media websites is also quite popular: 29.0 per cent report that their organisation uses this approach. Companies and agencies use these and other paid channels more often than governmental or non-profits. There are also significant differences between countries: Serbia, Romania, the Czech Republic and Norway are investing heavily in paid social media content, whereas Germany, Spain, Slovenia and Bulgaria are less engaged.

Personalisation and authenticity are major trends in communications – social media influencers are using this to build their brands and create large networks of followers (Freberg, 2019, pp. 167-178; Khamis et al., 2017). Some communication practitioners do the same. They distribute professional content on external media using their own name. However, only 16.7 per cent of the respondents are active in this way until now: they post at least daily and use two or more social media platforms.

Optimising content distribution is a key challenge, but leveraging the potential of content creation might be even more important (Pulizzi, 2014). The major sources for regularly creating content in European communication departments and agencies are internal (products and services, input from members of the organisation or clients and organisational strategies). Eight out of ten respondents confirm these as content inspiration. External input from users of owned media or products/services as well as topics discussed in mass or social media are taken into account less often. An asymmetric, internal-out perspective, is still prevailing in most organisations.

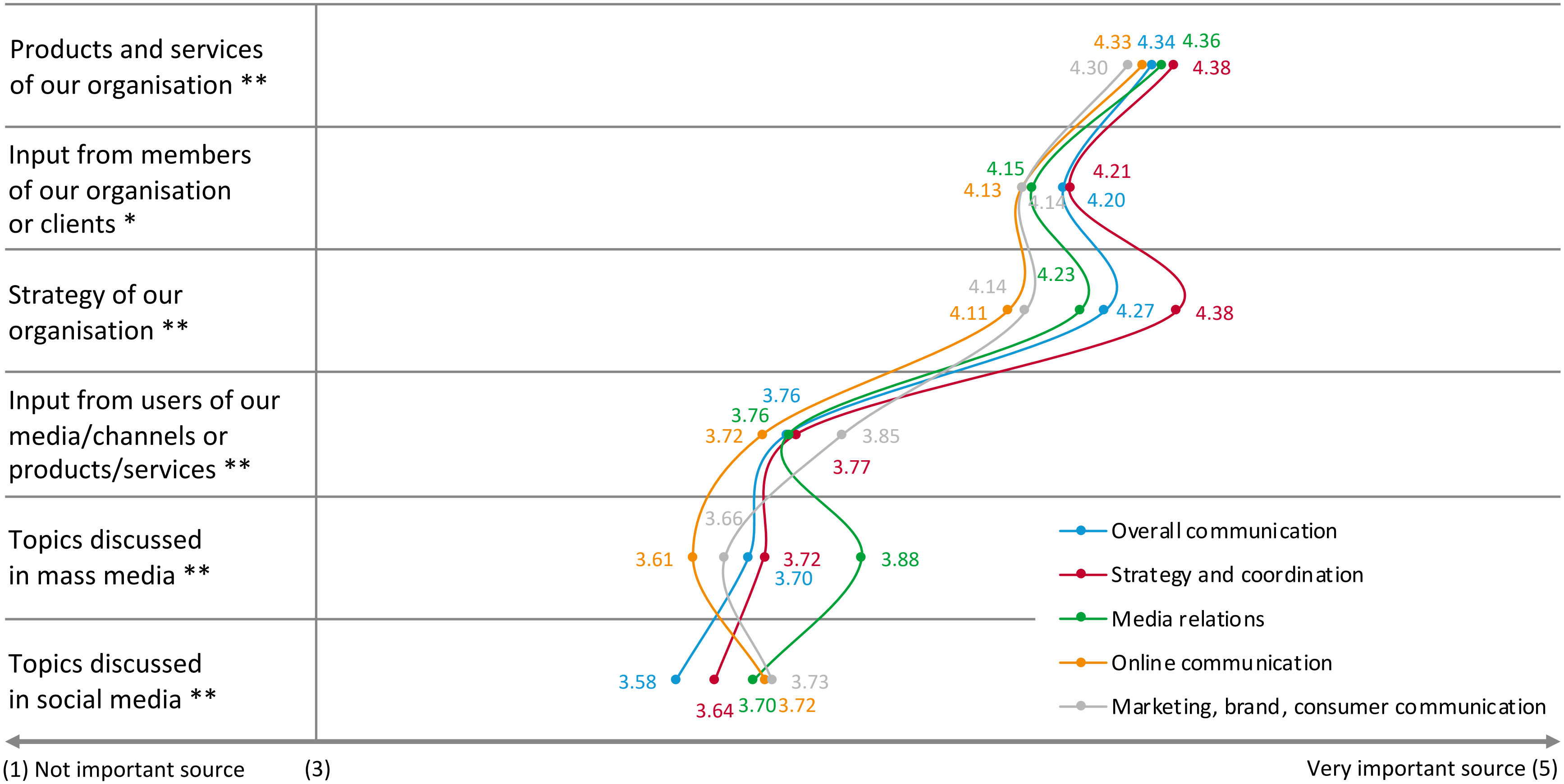
Content creation: Communication practitioners refer mostly to internal inspiration and requirements; external input and discourses are less relevant

Important sources for creating content in the daily work of communication departments/agencies

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals. Q 13: Content is a key asset in strategic communication and public relations. Ideas and inspiration for it might come from different angles. In your daily work and the work of colleagues in your department/agency, how important are the following sources when creating content? Scale 1 (Not important source) – 5 (Very important source). Frequency based on scale points 4-5.

Practitioners working in online and marketing/branding are less focused on organisational strategies and mass media when creating content

Sources used for creating content in the daily work of communication departments/agencies



www.communicationmonitor.eu / Zerfass et al. 2019 / n ≥ 665 communication professionals. Q 13: Content is a key asset in strategic communication and public relations. Ideas and inspiration for it might come from different angles. In your daily work and the work of colleagues in your department/agency, how important are the following sources when creating content? Scale 1 (Not important source) – 5 (Very important source). Mean values.
* Highly significant differences (Independent sample T-Test, p ≤ 0.01). * Significant differences (Independent sample T-Test, p ≤ 0.05).

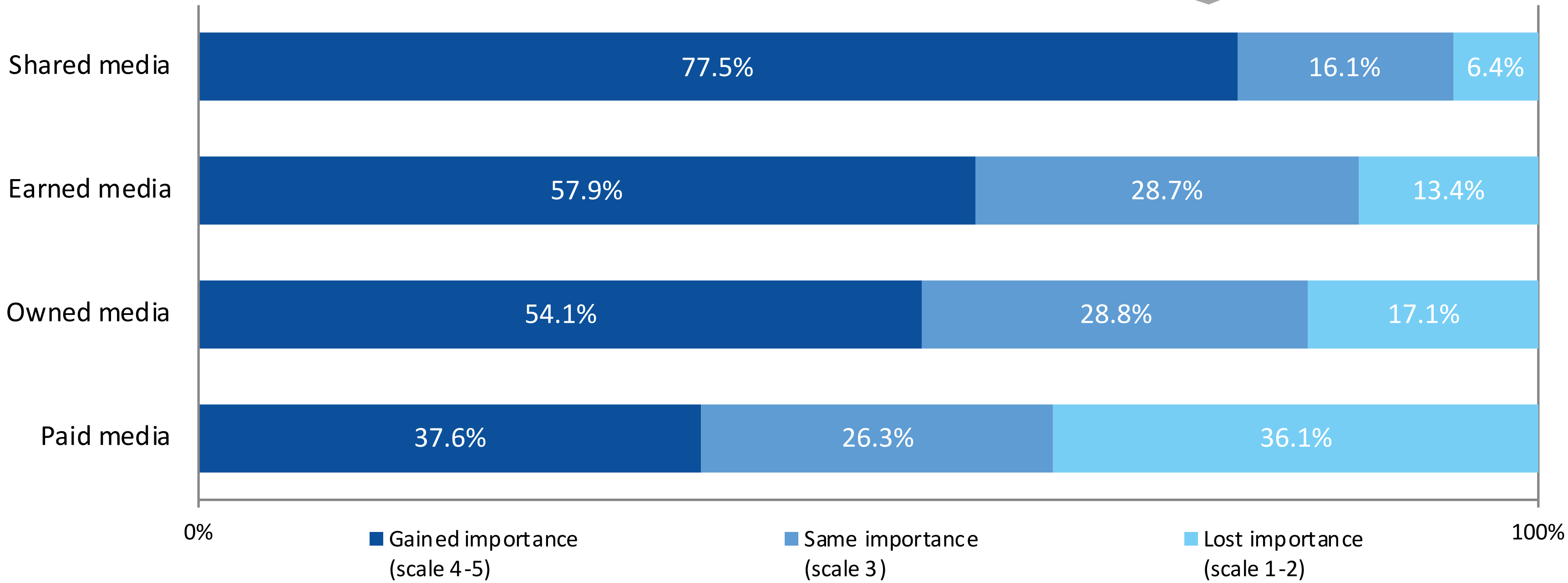
Content distribution: Shared media have clearly gained in importance; quite controversial estimations about paid communication

Predictions have been confirmed

Assessment by practitioners in the ECM 2015:

- Earned media: 57.1% rising importance
- Owned media: 50.3% rising importance
- Paid media: 36.1% loss of importance

Changing importance of channels for spreading content within the last three years



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals. Q 14: Different approaches can be used to spread content for shaping public opinion and influencing stakeholders. According to your experience, how has the relative importance of the following changed within the last three years? Earned media (content stimulated by the organisation and published without payments by mass/digital media or influencers; e.g. based on media releases, interviews, visuals, studies); Paid media (published content commercially contracted between organisations and mass/digital media or influencers; e.g. through advertisements, sponsored content, search words); Shared media (content published on social media platforms by supporters of any kind, e.g. followers, fans, members, employees, or representatives of the organisation); Owned media (content published on platforms controlled by the organisation, e.g. corporate events, magazines, websites and own social media channels). Scale 1 (Lost a lot of importance) – 5 (Gained a lot of importance). Predictive data for 2016-2018 based on surveying n = 2.232 communication professionals with slightly different item wordings; see Zerfass et al. 2015, pp. 16-20.

The perceived relevance of different distribution approaches varies across Europe; but shared media is always the most and paid the least important channel

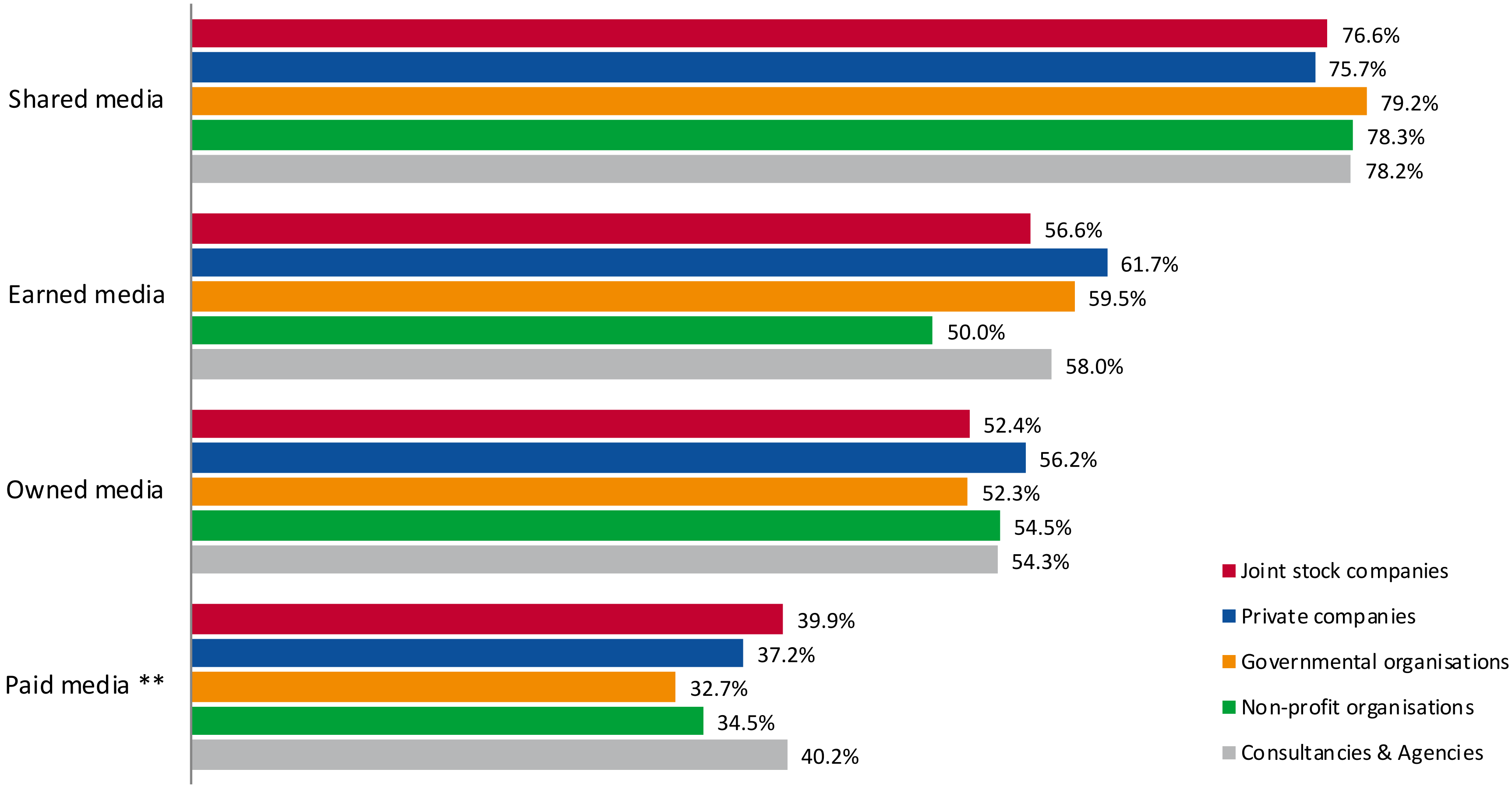
Changing importance of channels for spreading content within the last three years

	Shared media	Earned media	Owned media	Paid media **		Shared media	Earned media	Owned media	Paid media **
Germany	75.5%	54.8%	60.0%	44.5%	Spain	79.7%	71.4%	69.2%	39.1%
Austria	81.6%	56.6%	64.0%	31.6%	Portugal	76.5%	60.5%	48.1%	38.3%
Switzerland	79.6%	46.9%	60.2%	42.9%	Italy	67.9%	53.6%	49.4%	38.1%
France	86.4%	60.6%	39.4%	30.3%	Slovenia	75.8%	45.1%	51.6%	26.4%
Belgium	83.0%	63.1%	53.4%	40.9%	Croatia	75.4%	56.1%	41.2%	40.4%
Netherlands	80.1%	66.2%	51.5%	22.1%	Serbia	74.8%	66.4%	45.4%	45.4%
United Kingdom	80.7%	63.2%	51.5%	26.9%	Turkey	88.2%	63.2%	51.5%	39.7%
Ireland	69.2%	63.5%	57.7%	40.4%	Poland	87.5%	42.9%	50.0%	26.8%
Sweden	79.8%	68.3%	51.9%	29.8%	Czech Republic	85.4%	50.0%	45.8%	52.1%
Norway	70.6%	41.2%	61.2%	30.6%	Romania	64.1%	56.7%	54.8%	51.6%
Finland	81.3%	55.2%	61.5%	30.2%	Bulgaria	84.0%	66.0%	62.0%	54.0%

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,420 communication professionals from 22 countries. Q 14: Different approaches can be used to spread content for shaping public opinion and influencing stakeholders. According to your experience, how has the relative importance of the following changed within the last three years? Scale 1 (Lost a lot of importance) – 5 (Gained a lot of importance). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, p ≤ 0.01).

Assessments of paid communication are correlated with the type of organisation

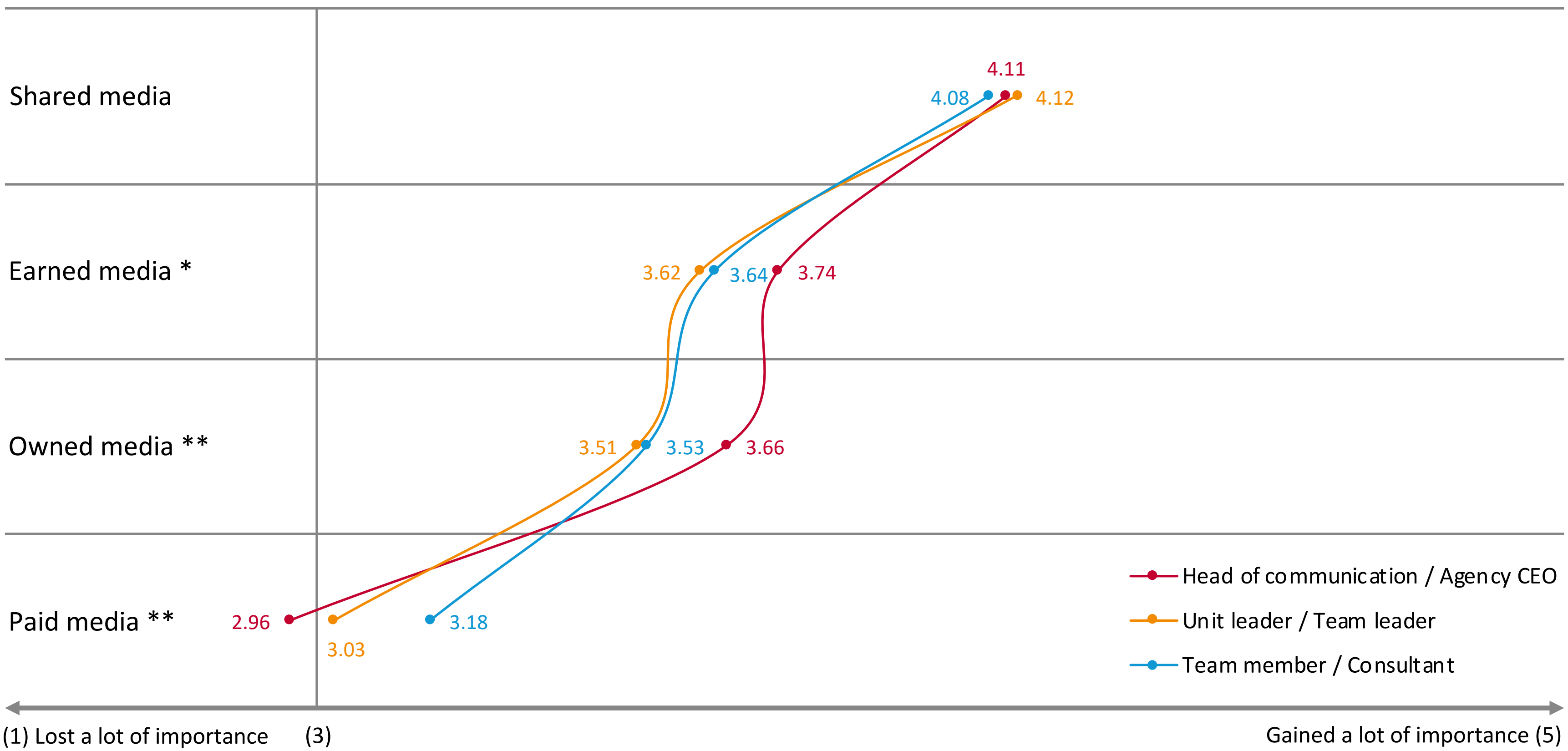
Rising importance of channels for spreading content within the last years



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals. Q 14: Different approaches can be used to spread content for shaping public opinion and influencing stakeholders. According to your experience, how has the relative importance of the following changed within the last three years? Scale 1 (Lost a lot of importance) – 5 (Gained a lot of importance). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, p ≤ 0.01).

Top-level communicators report a stronger shift of priorities towards owned and earned media and a declining importance of paid activities

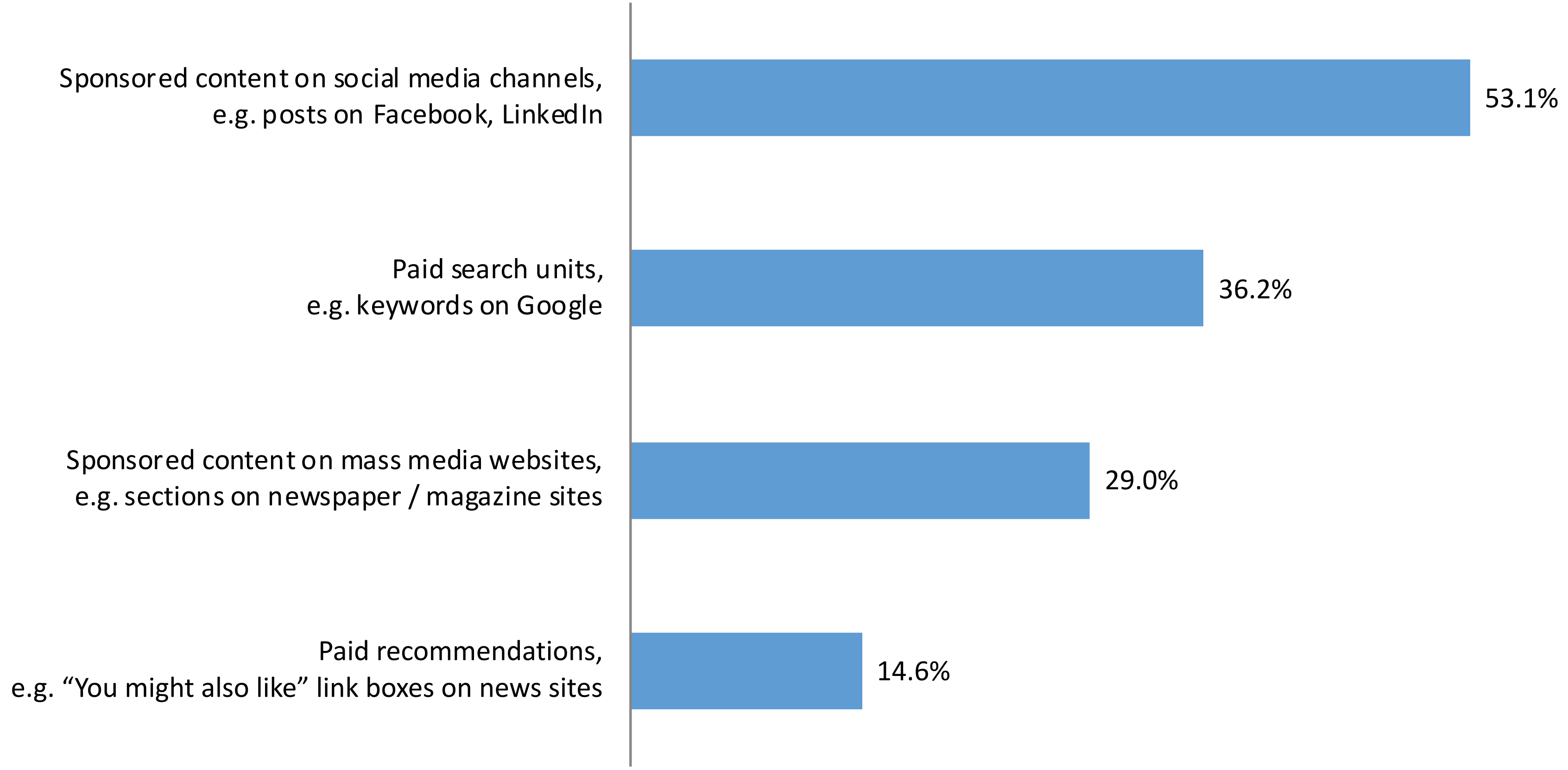
Rising importance of channels for spreading content within the last years



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,514 communication professionals. Q 14: Different approaches can be used to spread content for shaping public opinion and influencing stakeholders. According to your experience, how has the relative importance of the following changed within the last three years? Scale 1 (Lost a lot of importance) – 5 (Gained a lot of importance). Mean values. ** Highly significant differences (Kendall rank correlation, p ≤ 0.01). * Significant differences (Kendall rank correlation, p ≤ 0.05).

Paid online communication: Sponsored social media content is used by every second communication department and agency in Europe

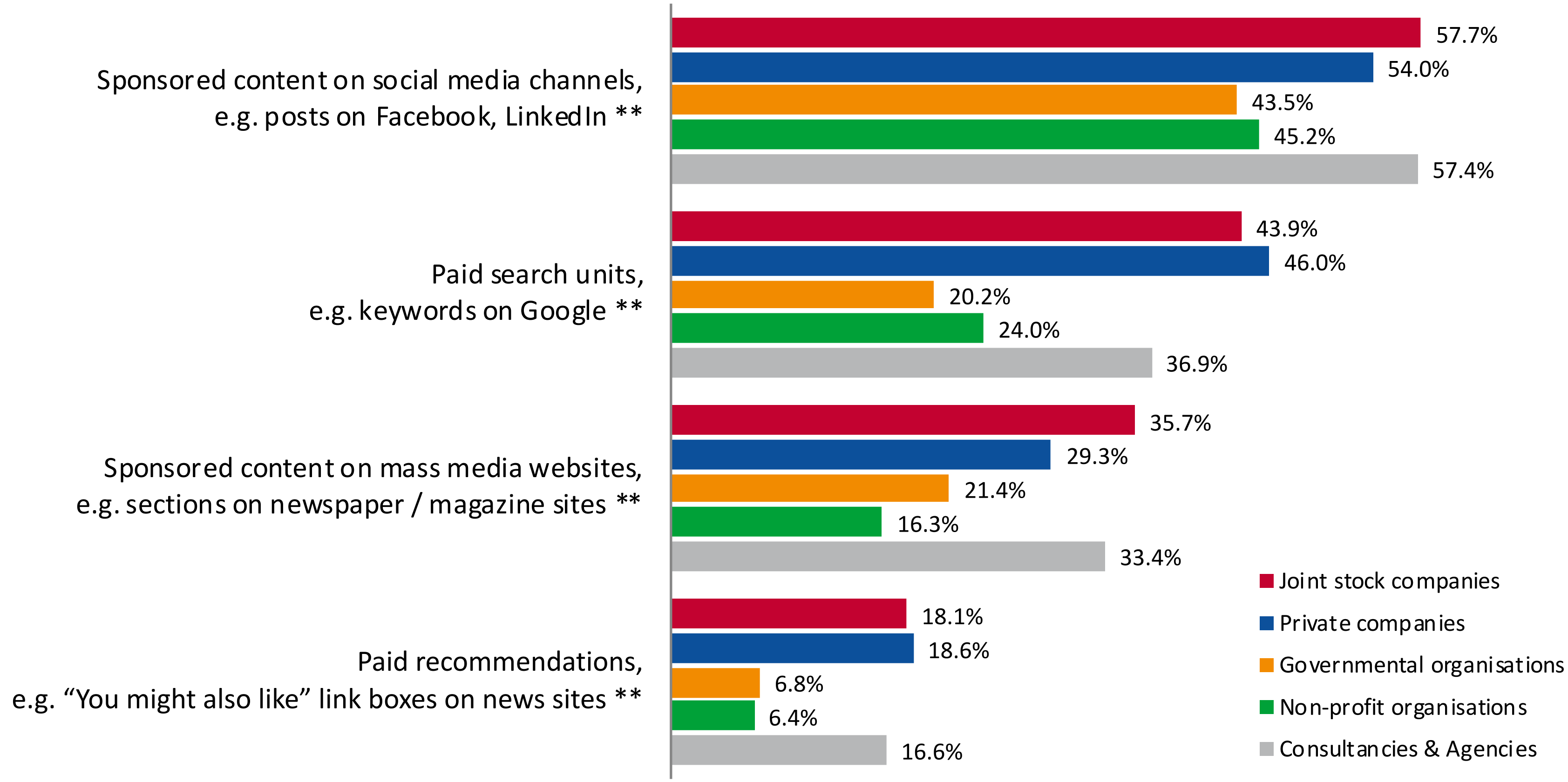
Frequently used ways to spread content



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,573 communication professionals. Q 15: How often does your department/agency use the following ways to spread content? Scale 1 (Never) – 5 (Very frequently). Frequency based on scale points 4-5.

Companies and agencies use paid channels significantly more often

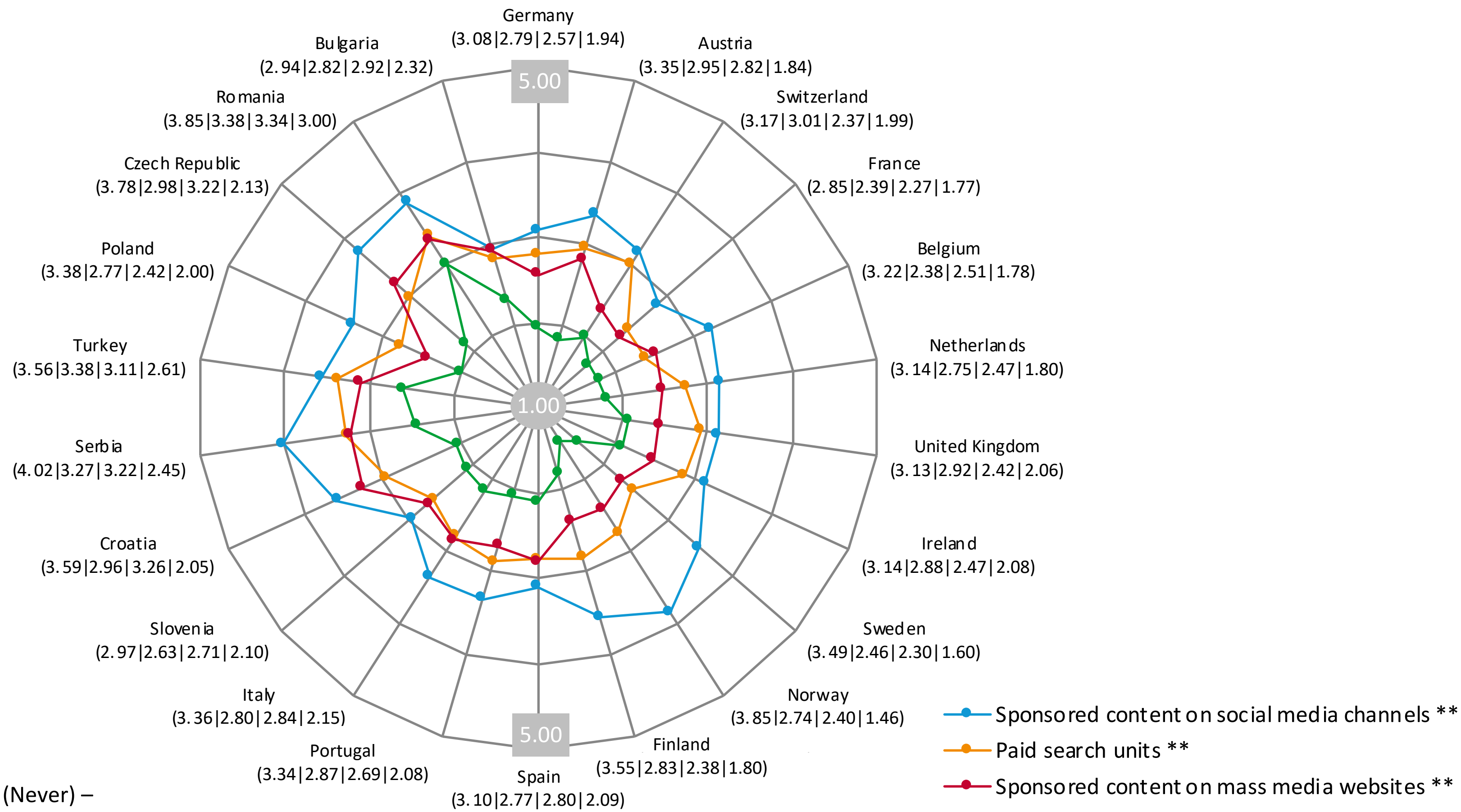
Frequently used ways to spread content



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,573 communication professionals. Q 15: How often does your department/agency use the following ways to spread content? Scale 1 (Never) – 5 (Very frequently). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, p ≤ 0.01).

Paid online communication in different European countries

Frequently used ways to spread content



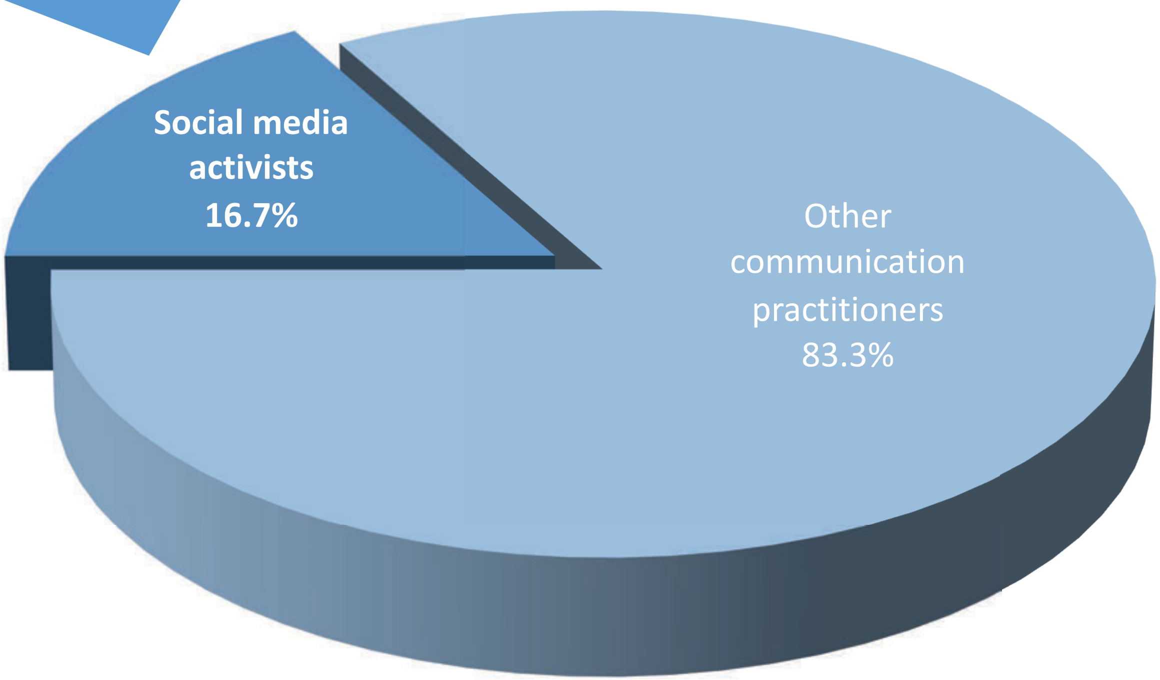
Scale: 1 (Never) –
5 (Very frequently)

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,312 communication professionals from 22 countries. Q 15: How often does your department / agency use the following ways to spread content? Scale 1 (Never) – 5 (Very frequently). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01).

Communication professionals as content distributors: Every sixth practitioner posts daily professional content under his/her own name

Social media activists

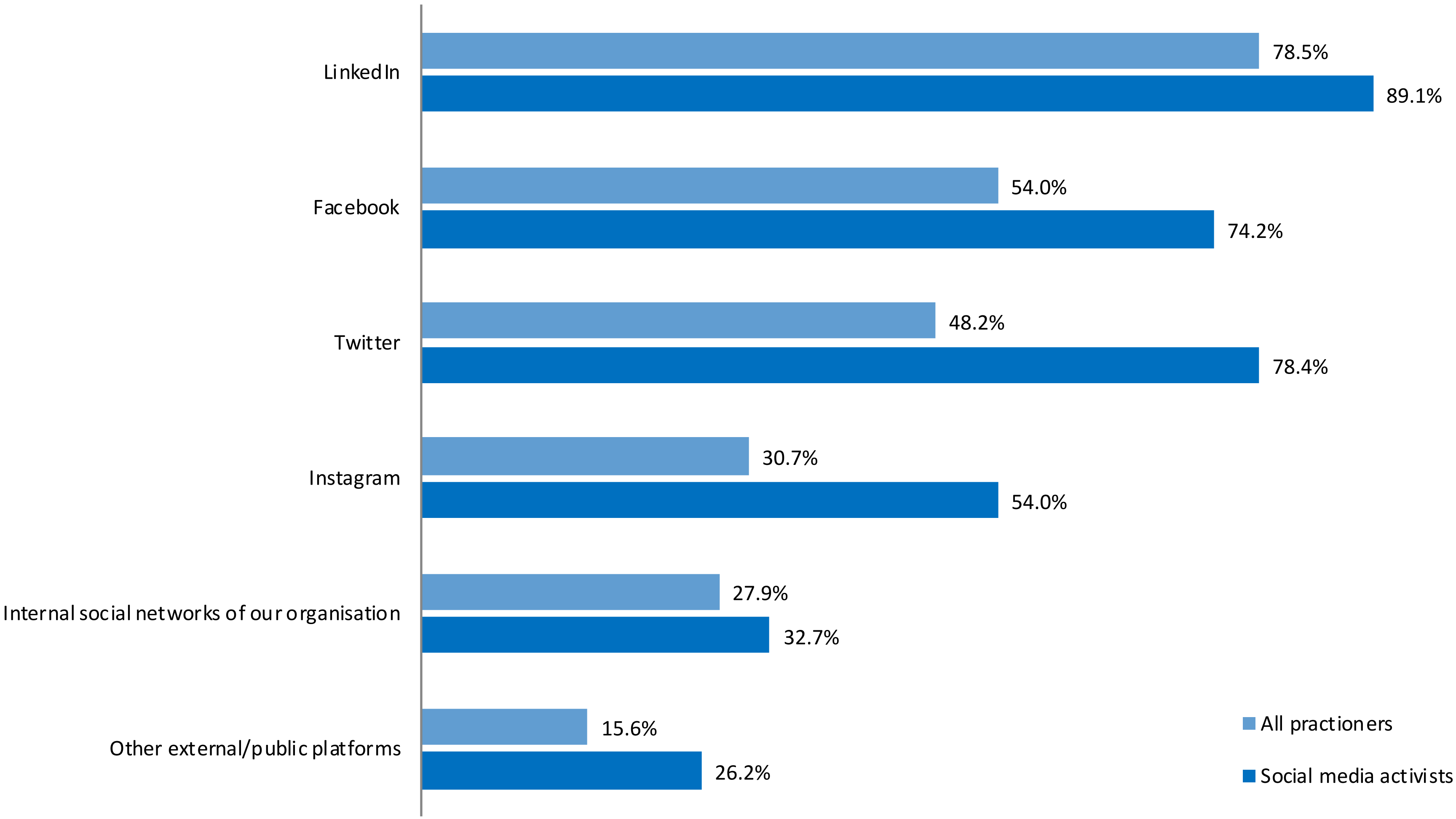
Communication practitioners
- posting professional content on external/public media
- at least daily
- on two or more social media platforms
- using their own name



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals. Q 27: Which social media platforms do you use to post content about professional issues or your business/organisation using your own name? Q 28: How often do you post professional content on external/public social media (Twitter etc.) using your own name?

LinkedIn is the most popular platform for communicators when they post individually about professional issues or their business/organisation

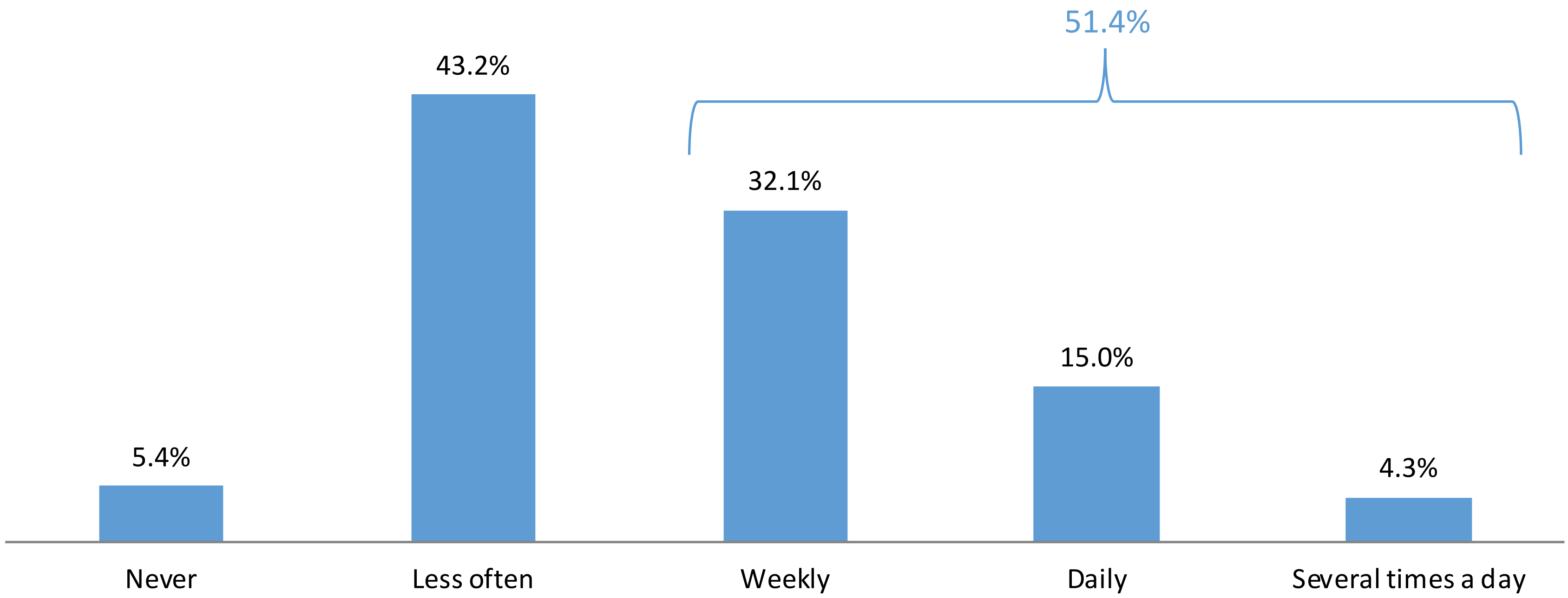
Social media platforms used by communicators to spread content under their own name



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals. Q 27: Which social media platforms do you use to post content about professional issues or your business/organisation using your own name?

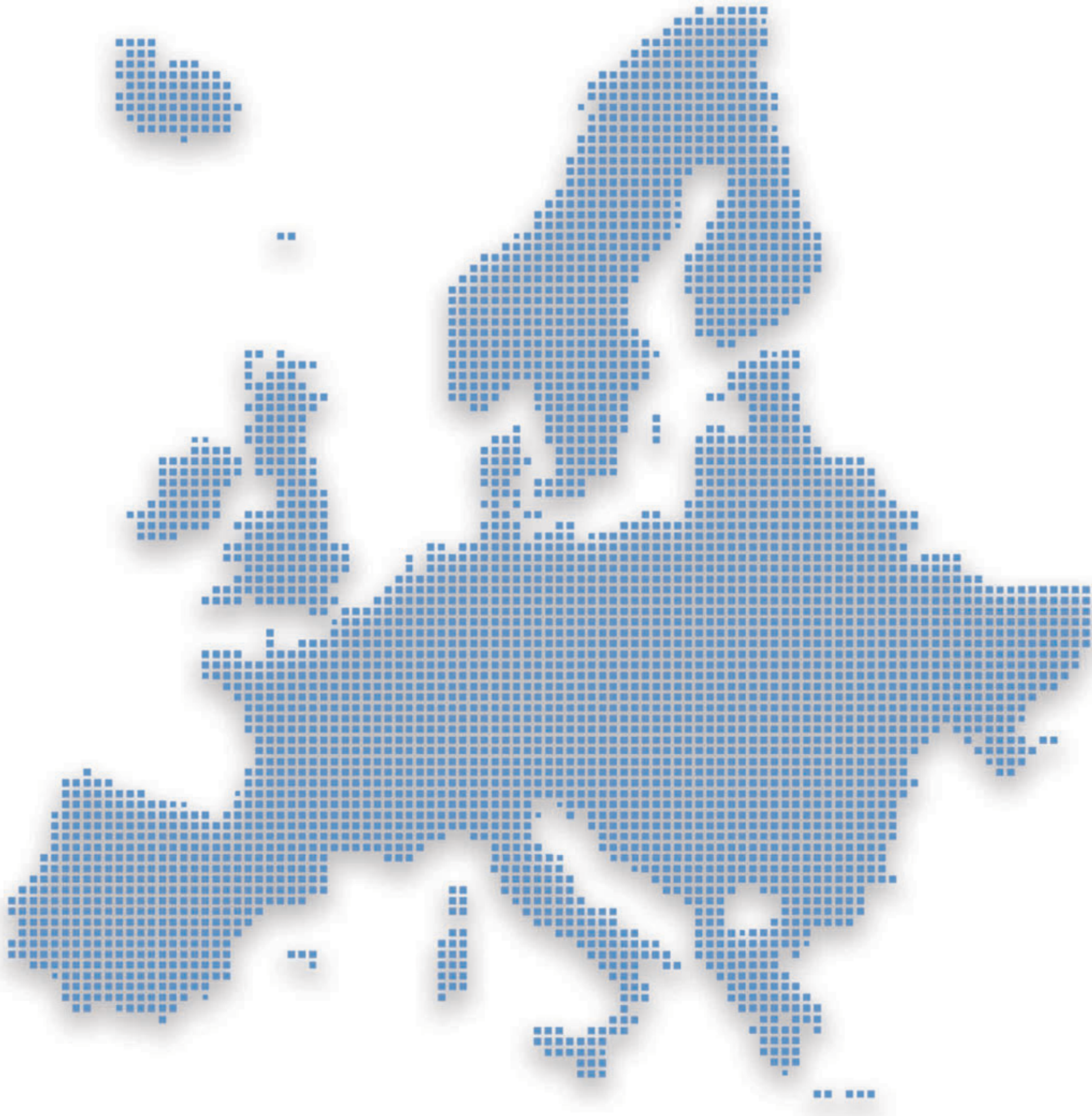
The majority of communication practitioners post at least once a week individually about professional topics

Frequency of posting professional content on external/public social media under the own name



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,689 communication professionals. Q 28: How often do you post professional content on external/public social media (Twitter etc.) using your own name?

Salaries



Chapter overview

The European Communication Monitor has collected data on salaries for communication professionals in Europe for over a decade. It is interesting to see how consistent the results are for different categories and regions across the continent since 2009.

Communication seems to be a stable, institutionalised profession, offering remuneration at different levels, affected primarily by geographic location and a country's relative wealth levels. Communication professionals are in general doing economically rather well, but there are wider differences within and between countries. There are practically the same cohorts of middle and top earners in the profession in Europe from 2009 to 2019.

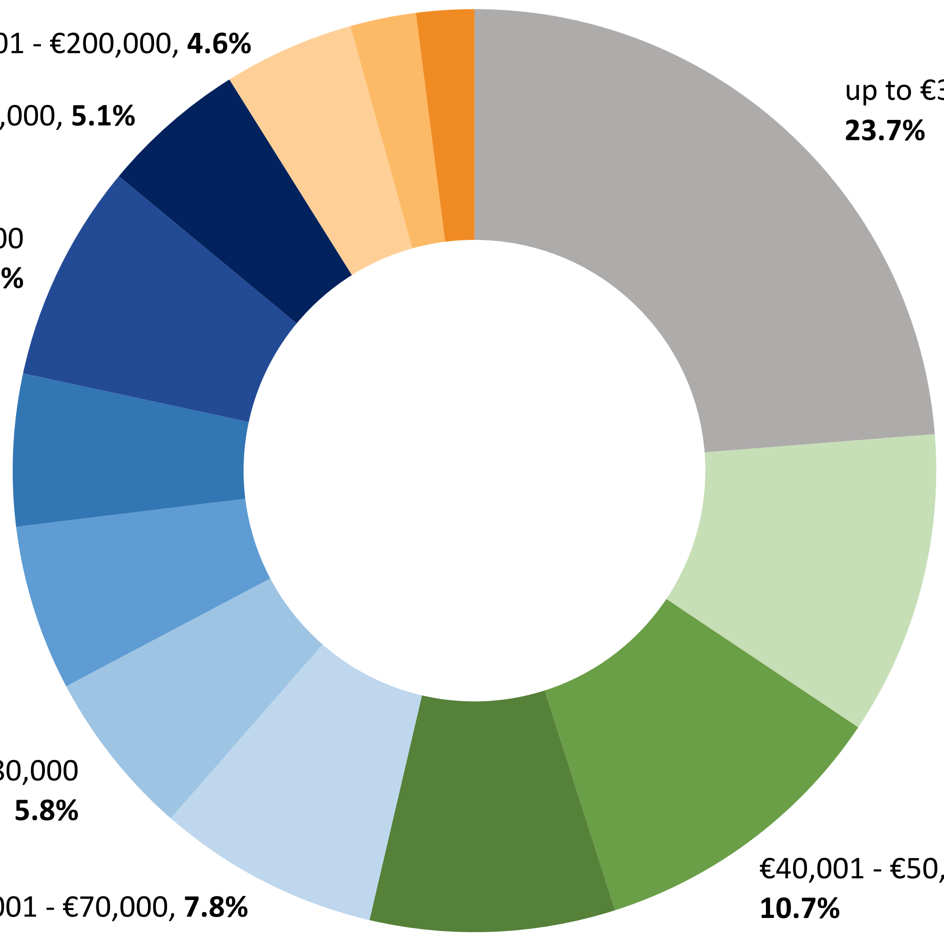
Every fifth respondent (21.1 per cent) earns over €100,000 annually. Within this top group, 2.2 per cent make over €200,000 and 1.6 per cent over €300,000 per year. On the other hand, more than half (53.6 per cent) of European communication practitioners earn not more than €60,000, and nearly a quarter (23.7 per cent) only up to €30,000. Joint stock and private companies pay better, as do agencies, while governmental organisations and non-profit organisations are lagging behind.

Basic annual salaries for heads of communication in organisations and agency CEOs are consistent for the last decade. The largest cohort is in the middle (earning annually between €60,001 and €100,000). This band includes 35.6 per cent of the respondents in 2009 and 30.2 per cent in 2019. The highest level (earning more than €150,000) is also almost stable with 17.9 per cent in 2009 and 17.0 per cent in 2019. The only increase are the lower earners (earning up to €30,000 per year), from 4.4 per cent in 2009 to 11.2 per cent in 2019. This is probably the result of increased inclusion over the years of more countries from Eastern and Southern Europe: there were 18 of them in 2009, and there are 28 from these regions in this edition.

Over the decade salaries are generally consistently higher in Northern and Western Europe, and lower in Eastern and Southern Europe. There are 42.5 per cent of communication professionals in Switzerland who earn more than €150,000 annually. 24.0 per cent in the United Kingdom and 20.6 per cent in Germany enjoy the same income. But there are no respondents in this category from Bulgaria, Croatia, Serbia and Slovenia.

Conversely, 84.4 per cent of Bulgarian practitioners and more than 70 per cent in Romania, Serbia and Croatia earn less than €30,000 annually, while there are none in this category in Switzerland, the Netherlands and Norway. Obviously general salary levels as well as living costs differ sharply between these countries, and the ECM data collected in the communications profession reflect this quite well.

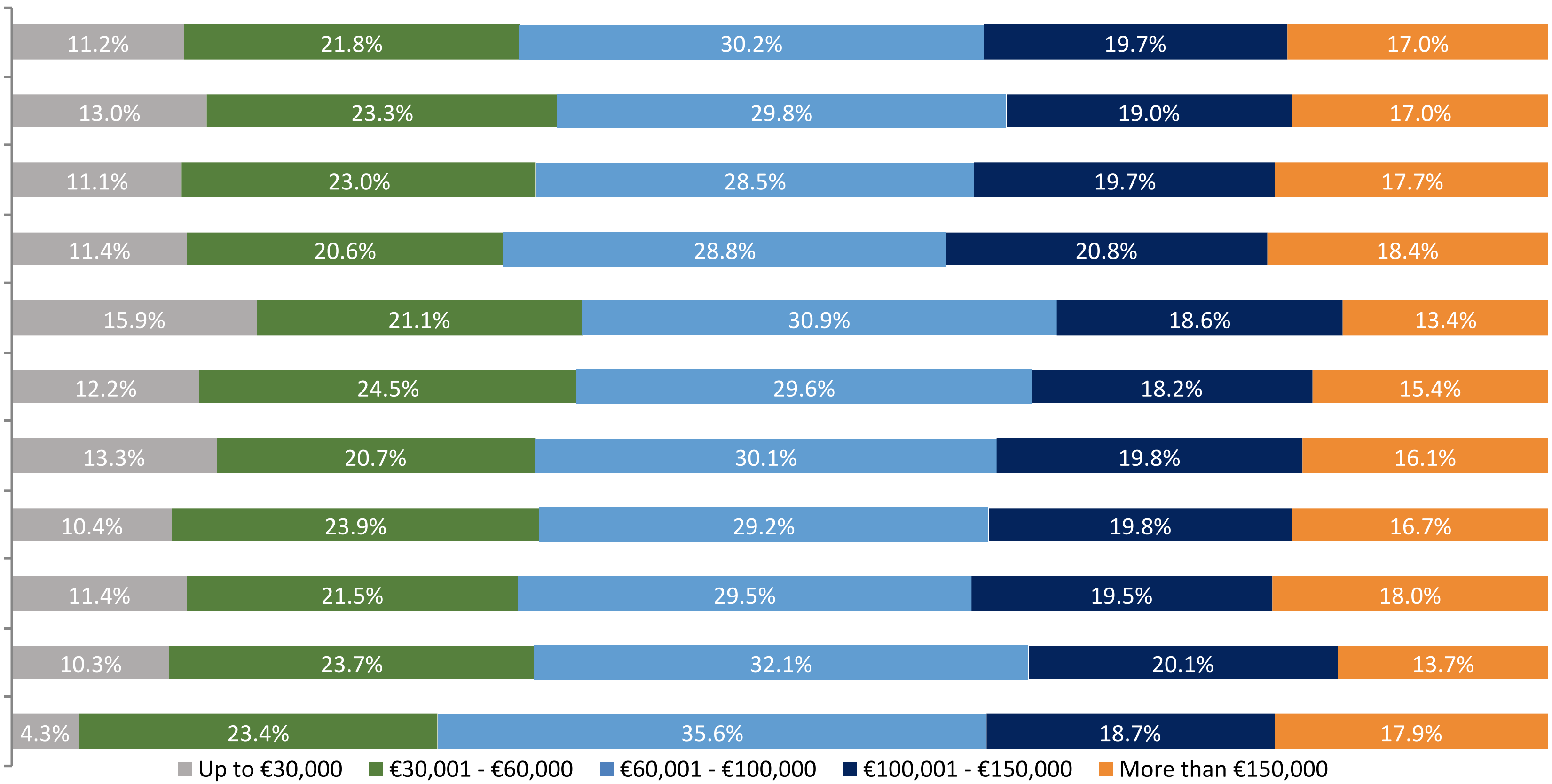
Basic annual salary of communication practitioners in Europe 2019



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,123 communication professionals. Q 34: In which of the following bands does your basic annual salary fall?

10 year tracking of top level communicators' salaries

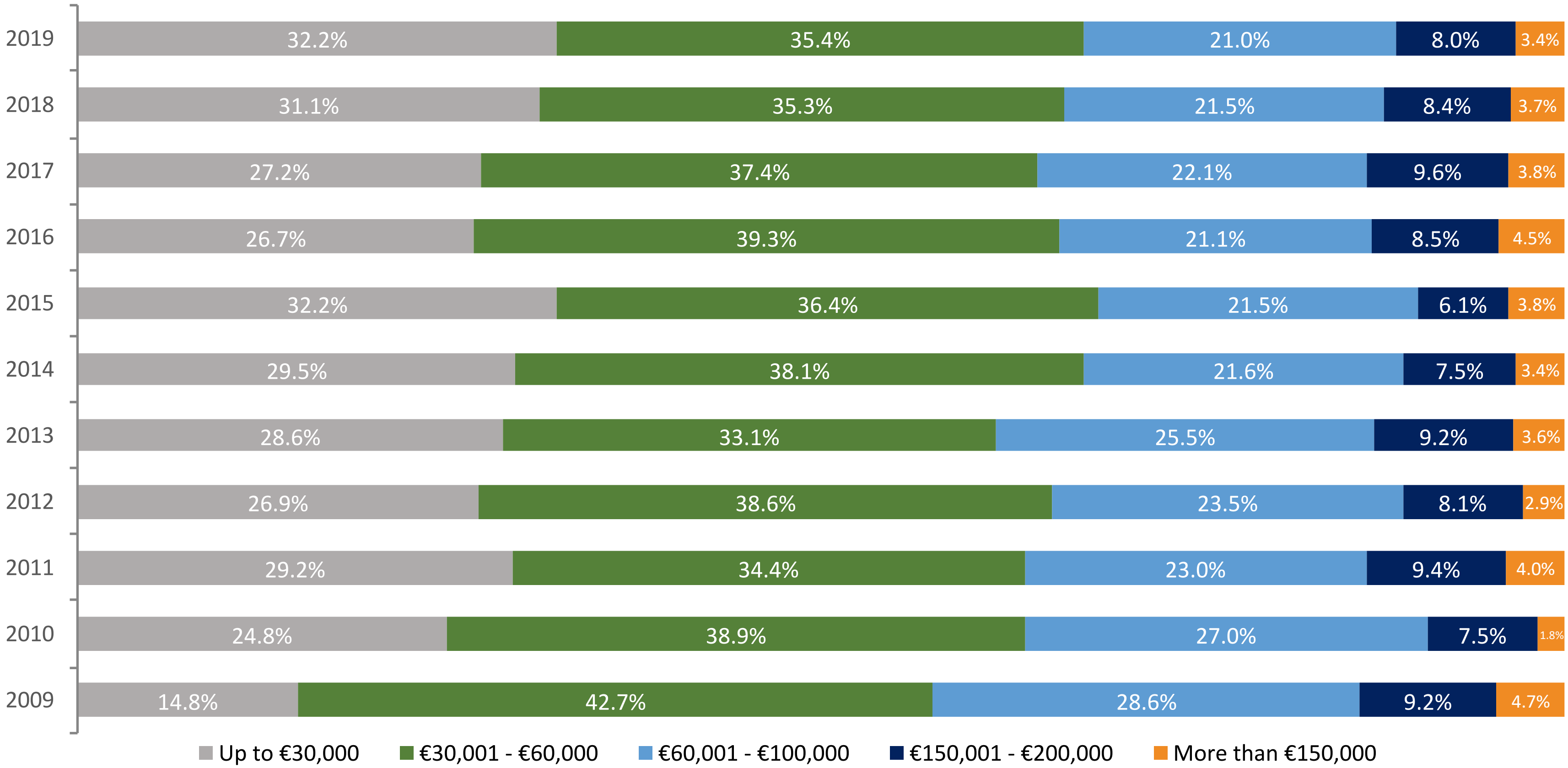
Basic annual salaries (heads of communication and agency CEOs)



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 857 heads of communication and agency CEOs (Q 34); Zerfass et al. 2018 / n = 941 (Q 37); Zerfass et al. 2017 / n = 1,099 (Q 31); Zerfass et al. 2016 / n = 860 (Q 32); Zerfass et al. 2015 / n = 828 (Q 33); Zerfass et al. 2014 / n = 966 (Q 41); Zerfass et al. 2013 / n = 970 (Q 17); Zerfass et al. 2012 / n = 798 (Q 39); Zerfass et al. 2011 / n = 887 (Q 20); Zerfass et al. 2010 / n = 809 (Q 19); Zerfass et al. 2009 / n = 951 (Q 17). Q: 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.

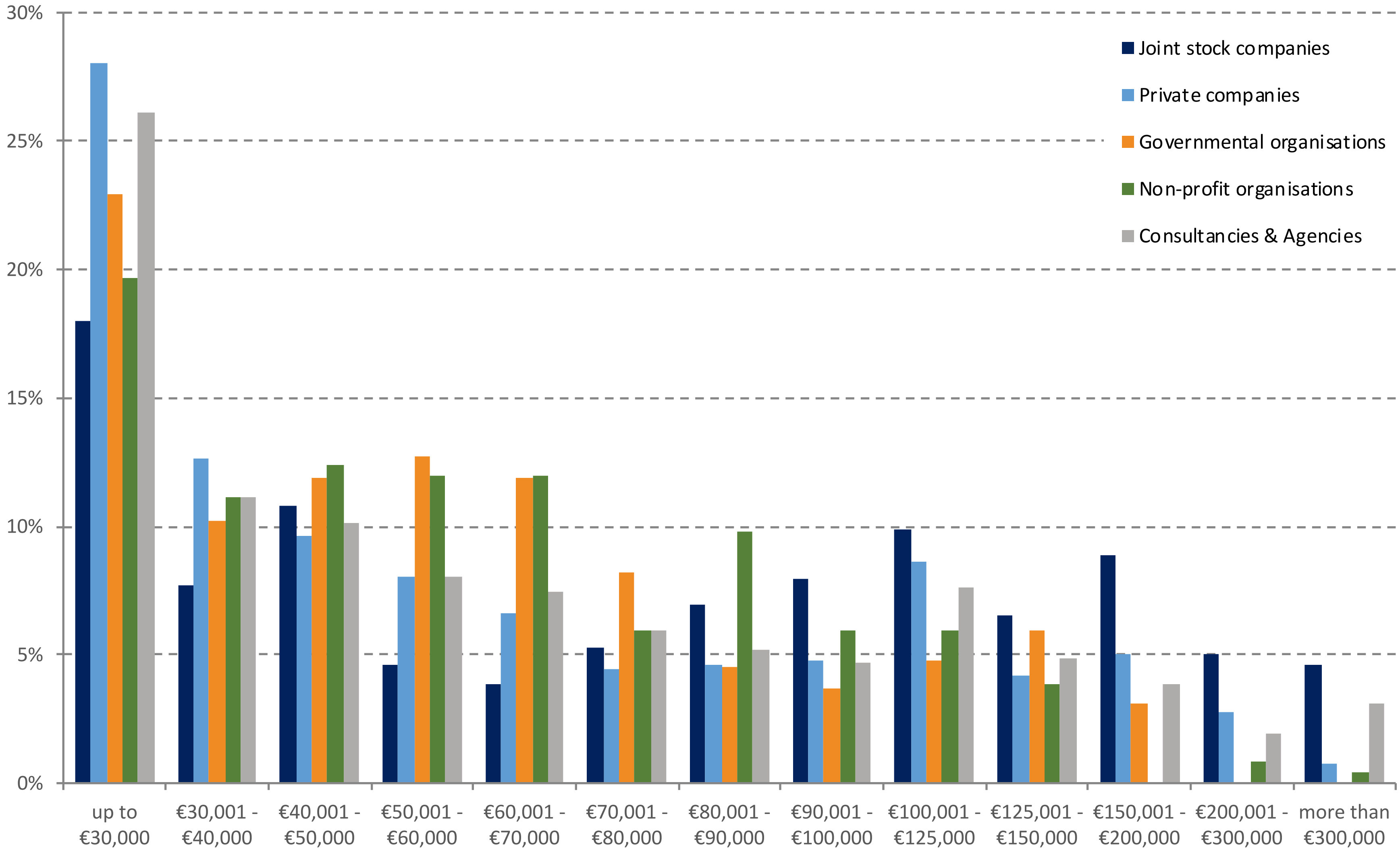
Salary development on other hierarchical levels

Basic annual salaries (unit leaders, team members, consultants)



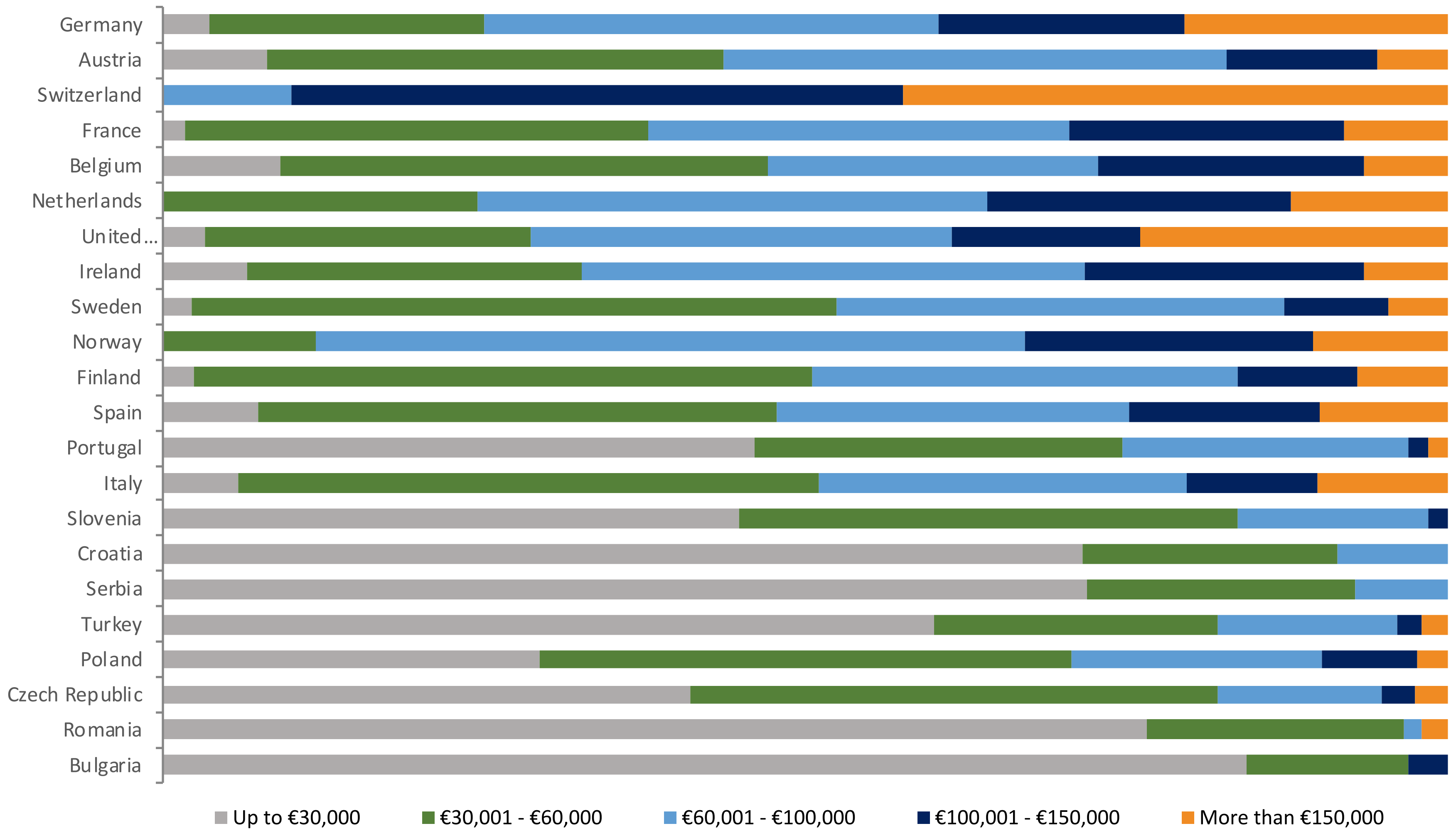
www.communicationmonitor.eu / Zerfass et al. 2019 / n = 1,266 communication professionals below the top level of the hierarchy (Q 34); Zerfass et al. 2018 / n = 1,602 (Q 37); Zerfass et al. 2017 / n = 1,793 (Q 31); 2016 / n = 1,433 (Q 32); Zerfass et al. 2015 / n = 1,067 (Q 33); Zerfass et al. 2014 / n = 1,428 (Q 41); Zerfass et al. 2013 / n = 1,287 (Q 17); Zerfass et al. 2012 / n = 1,013 (Q 39); Zerfass et al. 2011 / n = 927 (Q 20); Zerfass et al. 2010 / n = 879 (Q 19); Zerfass et al. 2009 / n = 817 (Q 17). Q: 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 organisation



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 2,123 communication professionals. Q 34: In which of the following bands does your basic annual salary fall?

Annual salaries in different European countries



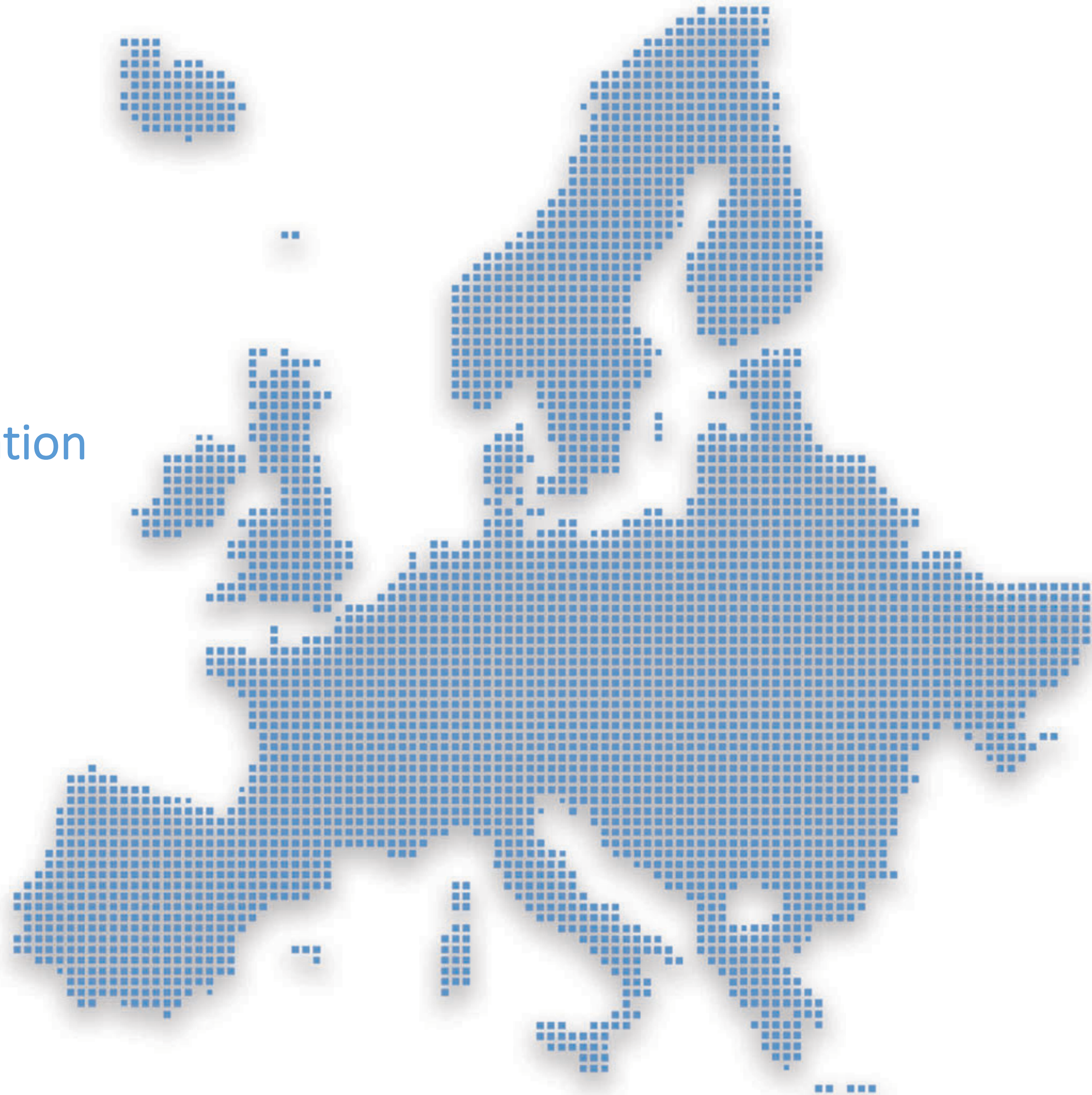
www.communicationmonitor.eu / Zerfass et al. 2019 / n = 1,903 communication professionals from 22 countries. Q 34: In which of the following bands does your basic annual salary fall?

Annual salaries in different European countries

	Up to €30,000	€30,001 - €60,000	€60,001 - €100,000	€100,001 - €150,000	More than €150,000		Up to €30,000	€30,001 - €60,000	€60,001 - €100,000	€100,001 - €150,000	More than €150,000
Germany	3.7%	21.3%	35.3%	19.1%	20.6%	Spain	7.3%	40.4%	27.5%	14.7%	10.1%
Austria	8.2%	35.5%	39.1%	11.8%	5.4%	Portugal	46.0%	28.6%	22.2%	1.6%	1.6%
Switzerland	-	-	10.0%	47.5%	42.5%	Italy	5.8%	45.3%	28.5%	10.2%	10.2%
France	1.6%	36.1%	32.8%	21.3%	8.2%	Slovenia	44.8%	38.8%	14.9%	1.5%	-
Belgium	9.1%	38.0%	25.6%	20.7%	6.6%	Croatia	71.6%	19.8%	8.6%	-	-
Netherlands	-	24.5%	39.6%	23.6%	12.2%	Serbia	72.0%	20.7%	7.3%	-	-
United Kingdom	3.3%	25.3%	32.7%	14.7%	24.0%	Turkey	60.0%	22.0%	14.0%	2.0%	2.0%
Ireland	6.5%	26.1%	39.1%	21.7%	6.5%	Poland	29.3%	41.5%	19.5%	7.3%	2.4%
Sweden	2.3%	50.0%	34.9%	8.1%	4.7%	Czech Republic	41.0%	41.0%	12.8%	2.6%	2.6%
Norway	-	11.8%	55.3%	22.4%	10.5%	Romania	76.6%	20.0%	1.4%	-	2.1%
Finland	2.4%	48.2%	32.9%	9.4%	7.1%	Bulgaria	84.4%	12.5%	-	3.1%	-

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 1,903 communication professionals from 22 countries. Q 34: In which of the following bands does your basic annual salary fall?

Characteristics of excellent communication departments



Chapter overview

Descriptions and explanations of professional practices carry normative implications. The European Communication Monitor has made these explicit since 2014 when it started to explore and identify excellent communication departments and what differentiates them. The research team developed a framework (Verčič & Zerfass, 2016) to perform such analyses, which has been explained and illustrated in a book on Communication Excellence (Tench et al., 2017).

The Comparative Excellence Framework for measuring excellence of communication departments stands on two pillars. It rates internal influence (advisory and executive influence) and external performance (success – is communication of the organisation more successful compared to those of competing organisations, and competence – the communication function's quality and ability compared to those of competing organisations). Approximately a quarter (24.5 per cent) of European organisations outperform on all four dimensions and therefore have excellent communication departments.

Excellent departments differ from ordinary ones in many aspects. Practitioners working in them report having more trusted relationships with superiors, colleagues and external partners. This supports the theoretical proposition that functional competence contributes to the trust one can gain among trustees (Verčič, 2000). Practitioners working in excellent departments also sense that public trust in the leaders of their organisation and themselves is significantly higher. Next to the functional competence, they feel fiduciary duties: they more strongly enhance stakeholder trust at all levels, most significantly in the top leaders. They perceive that they gain trust, and this results from their work on gaining trust, as well as their being knowledgeable and ethical. They find it less difficult to be transparent on all aspects of organisational behaviour, especially on strategies, governance and their organisation's impact on relevant sectors in society.

This combination of functional competence and fiduciary duty is also revealed in responses to the question on the most important strategic issues for communication management until 2022. All departments find building and maintaining trust as the most important issue, but excellent communication departments do so even more strongly. Excellent communication departments differ by find coping with the digital evolution and the social web, and using big data and/or algorithms for communication much more important than other communication departments.

More of the practitioners working in such departments are social media activists compared to peers in other organisations, and they personally use AI software and devices more often. Not surprisingly, these professionals find it less difficult to use Artificial Intelligence (AI) for communications and secure relevant requirements. But they are not naïve: they expect more impact of AI on the way they work, their department's work and on the profession overall.

Identifying excellent communication departments

The Comparative Excellence Framework uses statistical analyses to identify outperforming organisations, based on benchmarking and self-assessments known from quality management

EXCELLENCE

Communication departments in organisations which outperform others in the field

INFLUENCE

Internal standing of the communication department within the organisation

PERFORMANCE

External results of the communication department's activities and its basic qualifications

ADVISORY INFLUENCE

(Q19)

Senior managers take recommendations of the communication function (very) seriously

EXECUTIVE INFLUENCE

(Q20)

Communication will (very) likely be invited to senior-level meetings dealing with organisational strategic planning

SUCCESS

(Q21)

The communication of the organisation is (much) more successful compared to those of competing organisations

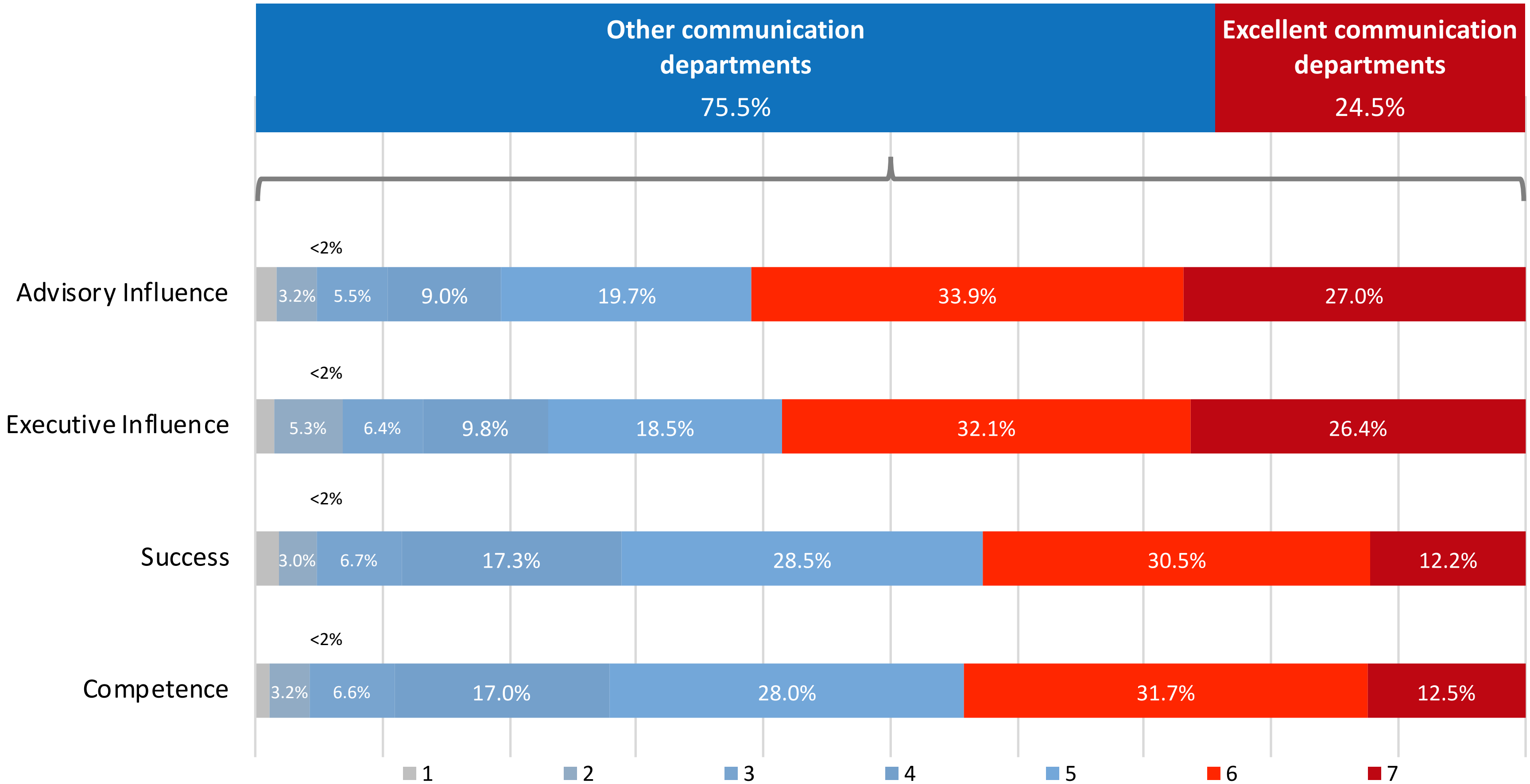
COMPETENCE

(Q22)

The quality and ability of the communication function is (much) better compared to those of competing organisations

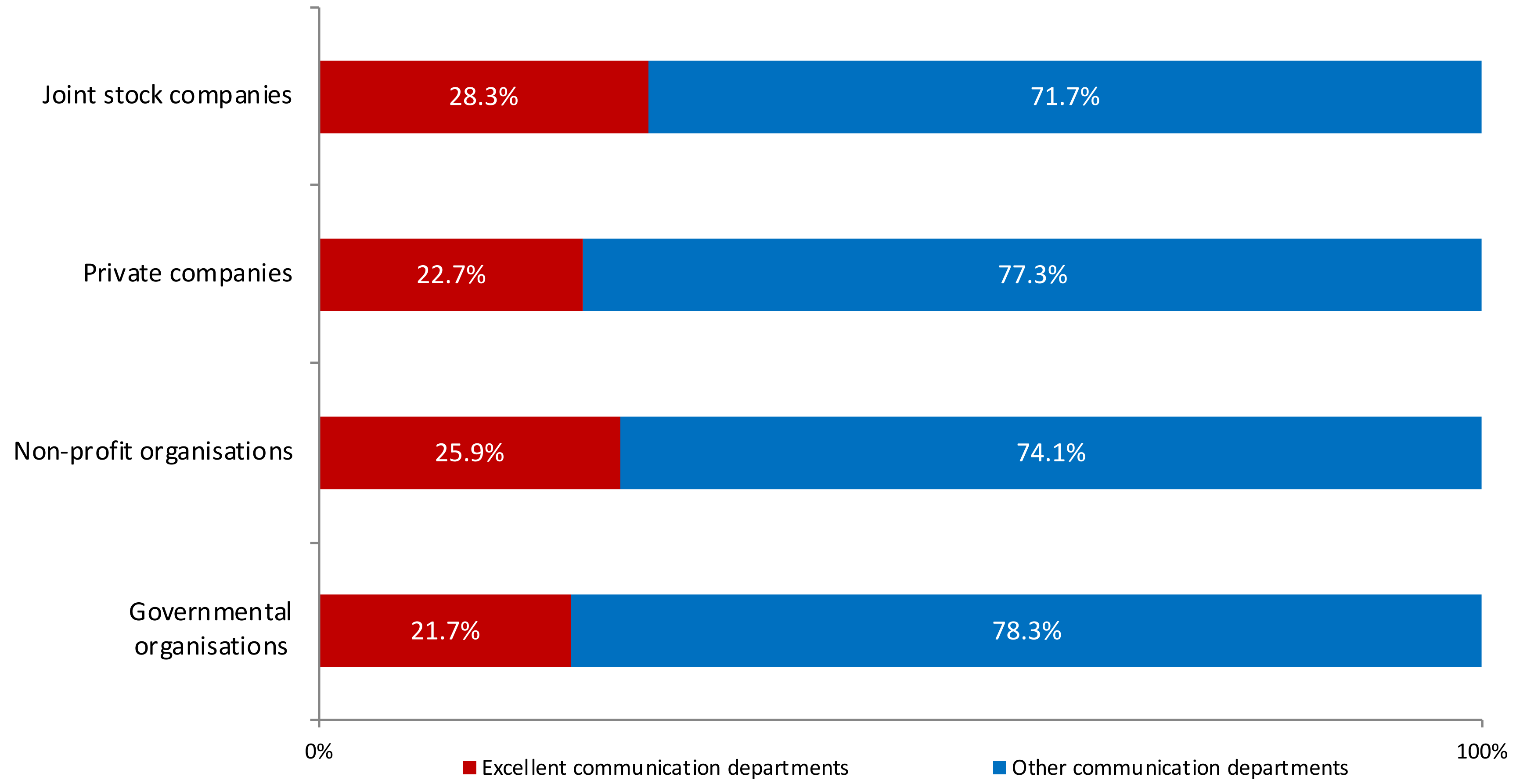
www.communicationmonitor.eu / Zerfass et al. 2019 / Only organisations outperforming in all four dimensions (scale points 6-7 on a 7-point-scale) will be considered as "excellent" in the benchmark exercise comparing distribution and characteristics of organisations, departments and communication professionals. For a description of the framework and method see Verčič and Zerfass (2016) as well as Tench et al. (2017).

Excellent communication departments



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 1,892 communications professionals in communication departments. Advisory influence, Q 19: In your organisation, how seriously do senior managers take the recommendations of the communication function? Scale 1 (Not seriously at all) – 7 (Very seriously). Executive influence, Q 20: How likely is it, within our organisation, that communication would be invited to senior-level meetings dealing with organisational strategic planning? Scale 1 (Never) – 7 (Always). Success, Q 21: In your opinion, how successful is the communication of your organisation compared to competitors? Scale 1 (Not successful at all) – 7 (Very successful). Competence, Q 22: How would you estimate the quality and ability of the communication function in your organisation compared to those of competitors? Scale 1 (Much worse) – 7 (Much better). Percentages: Excellent communication departments based on scale points 6-7 for each item.

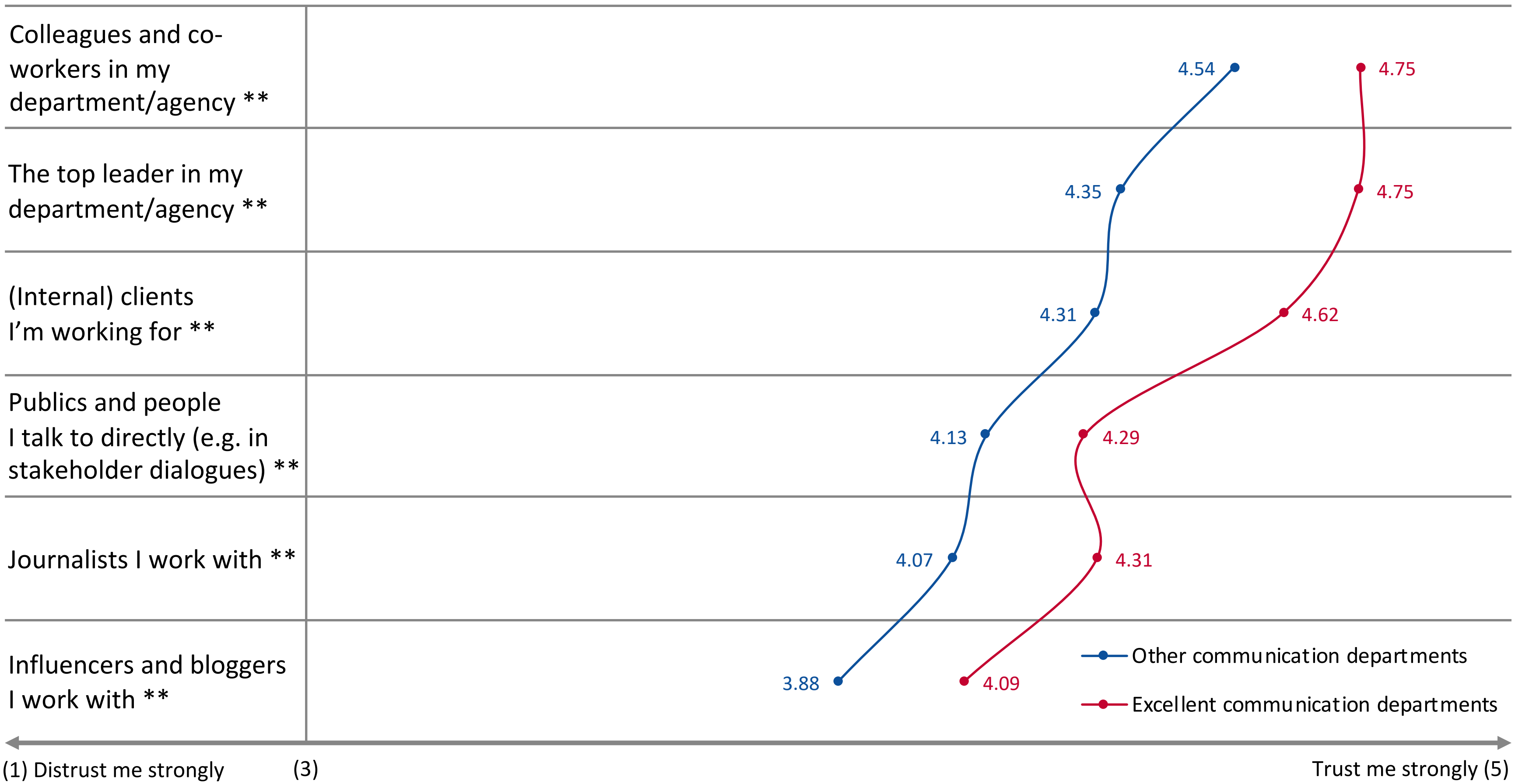
Excellence in different types of organisation



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 1,892 communication professionals in communication departments. Advisory influence, Q 19: In your organisation, how seriously do senior managers take the recommendations of the communication function? Executive influence, Q 20: How likely is it, within our organisation, that communication would be invited to senior-level meetings dealing with organisational strategic planning? Q 21: In your opinion, how successful is the communication of your organisation compared to competitors? Q 22: How would you estimate the quality and ability of the communication function in your organisation compared to those of competitors? Scale 1 – 7. Percentages: Excellent communication departments based on scale points 6-7 for each question.

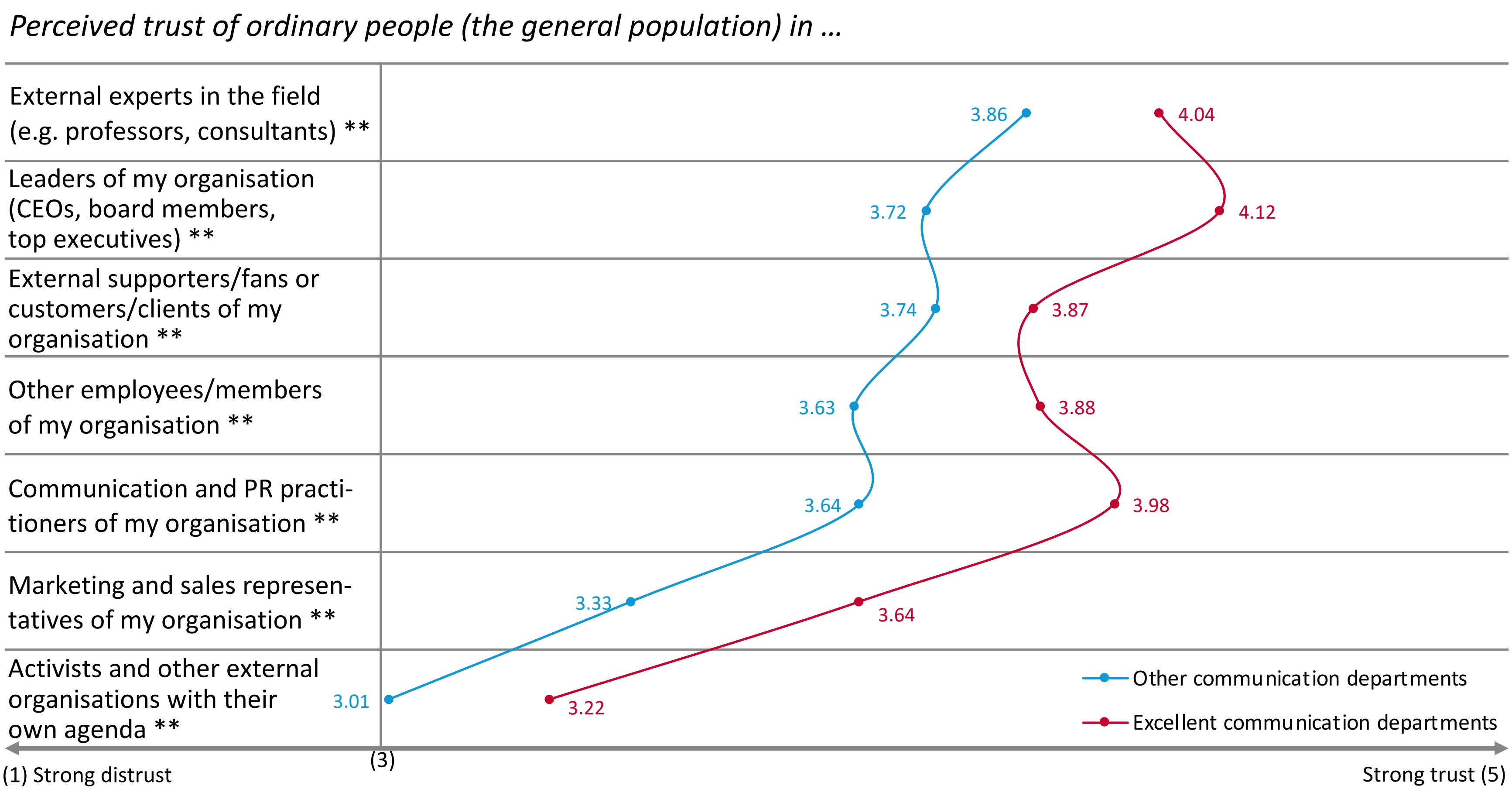
Practitioners working in excellent communication departments report more trusted relationships with their superiors, colleagues and external partners

Perceived trust in oneself by …



www.communicationmonitor.eu / Zerfass et al. 2019 / n ≥ 1,305 communication professionals in communication departments across Europe. Q 3: And now, please think about your personal situation. In your daily work, who tends to distrust your advice and activities, and who trusts you? Think of the average level of trust in each group. Scale 1 (Distrust me strongly) – 5 (Trust me strongly). Mean values. ** Highly significant differences (independent samples T-Test, $p \leq 0.01$).

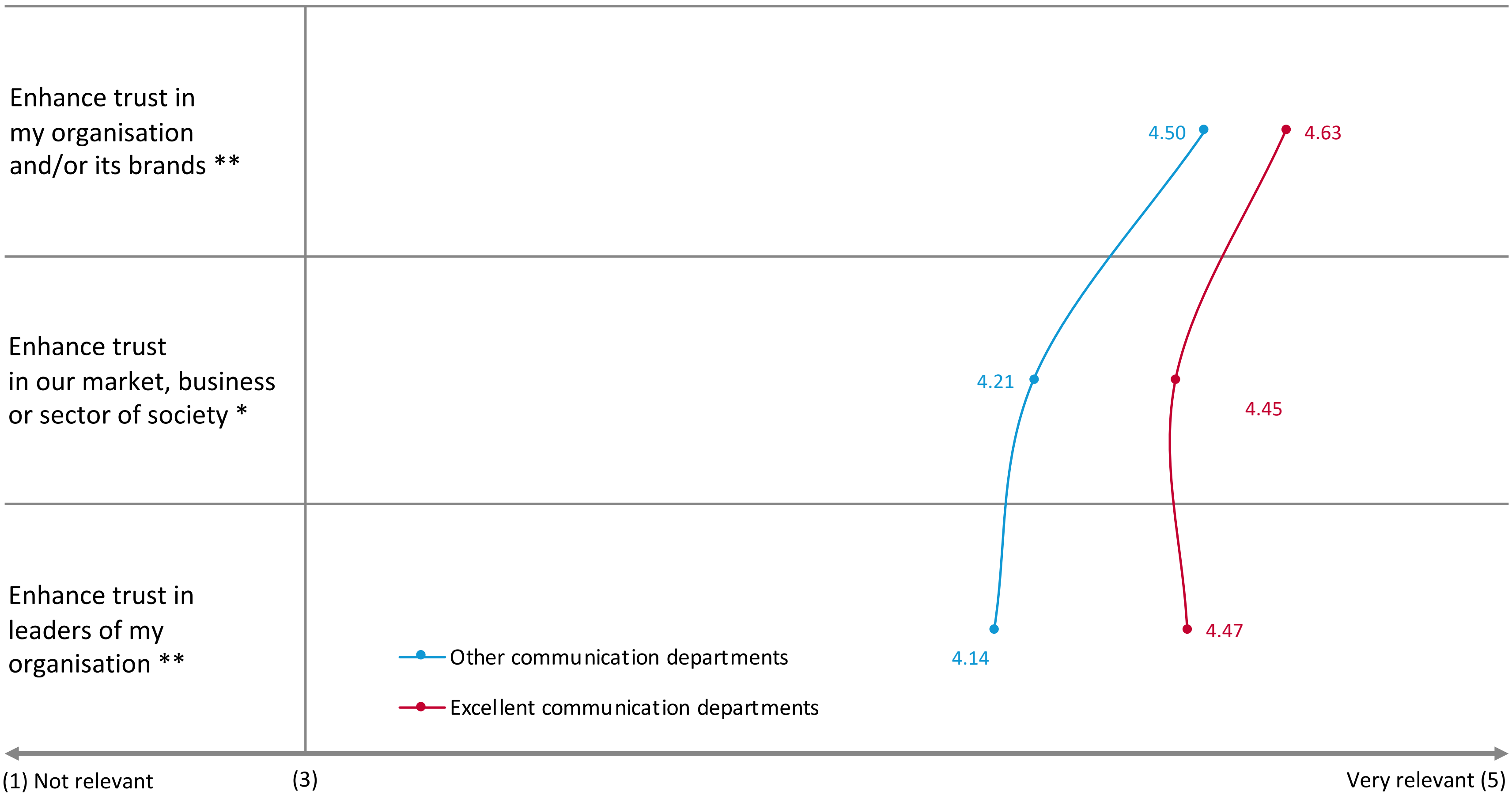
Practitioners working in excellent departments rate public trust in leaders of their organisation and themselves significantly higher



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 1,789 communication professionals in communication departments across Europe. Q 4: In addition to communication professionals there are many others who can speak on behalf of an organisation: top managers, marketing professionals, all of the organisation's employees, external experts, or external customers/clients. Thinking of your organisation, how much do ordinary people in your country (the general population) trust these communicators? Scale 1 (Strong distrust) – 5 (Strong trust). Mean values. ** Highly significant differences (independent samples T-Test, p ≤ 0.01).

Excellent communication departments are more strongly engaged in enhancing stakeholder trust on all levels – most significantly in top leaders

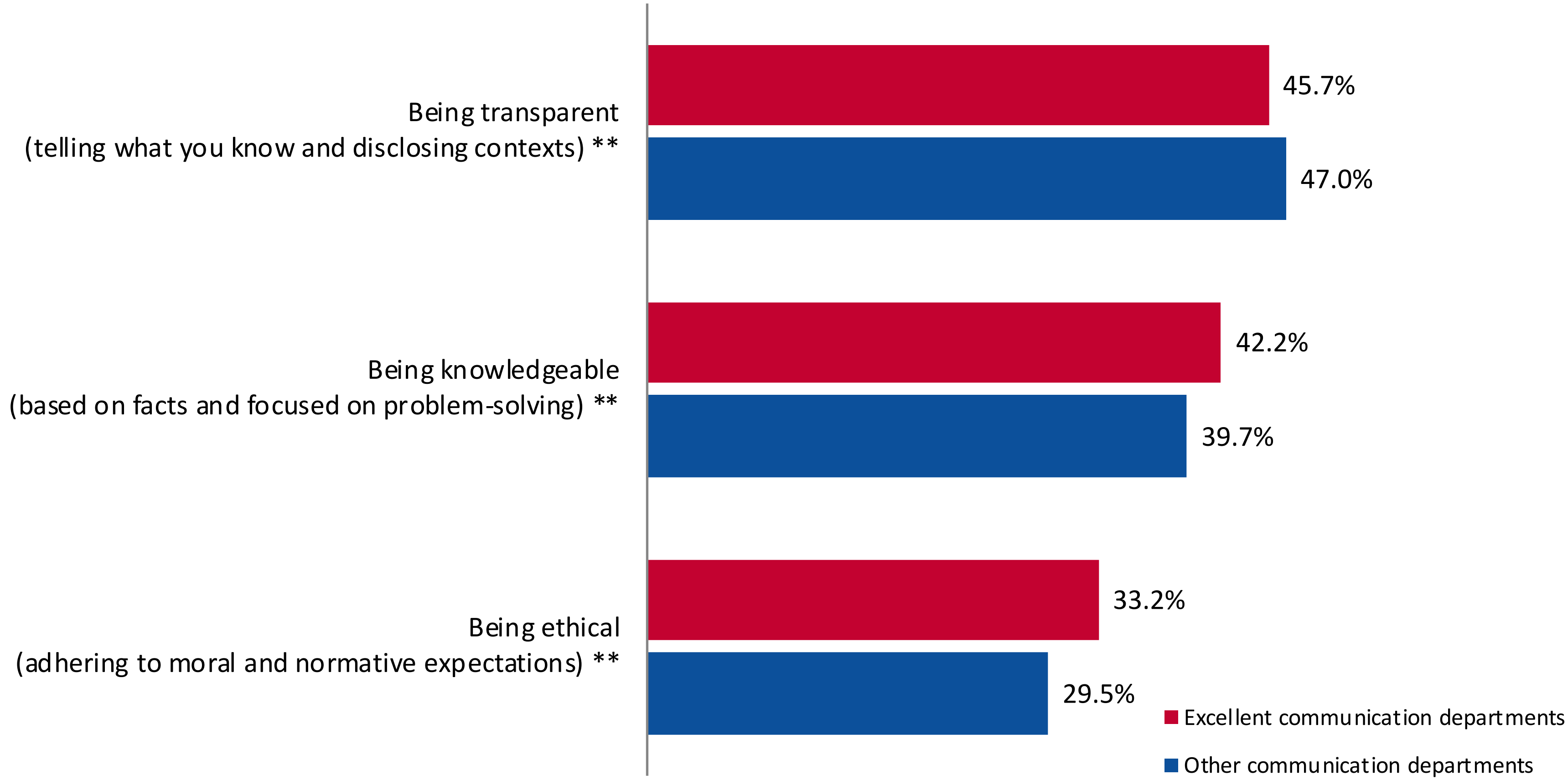
Goals in the daily work of communication professionals



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 1,892 communication professionals in communication departments across Europe. Q 5: Communication management may strive to gain stakeholders' trust on different levels. How relevant are each of the following goals in your daily work? Scale 1 (Not relevant) – 5 (Very relevant). Mean values. ** Highly significant differences (independent samples T-Test, p ≤ 0.01). * Significant differences (p ≤ 0.05).

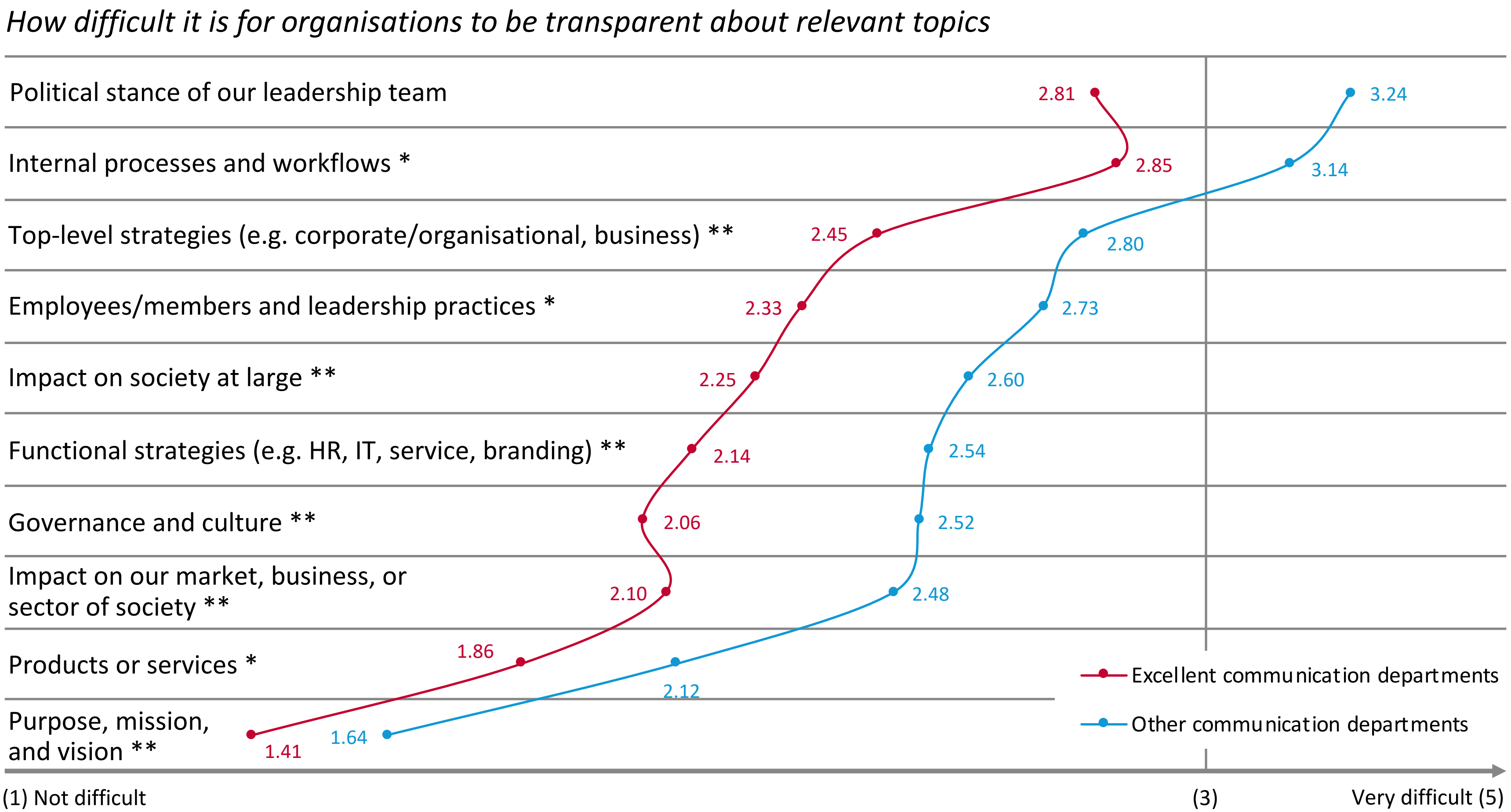
Practitioners working in excellent departments are more aware of the need for fact-based and morally suitable communication

Challenges when communicating with stakeholders



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 1,892 communication professionals in communication departments across Europe. Q 6: Building trust through communication can be difficult. Previous research shows that communication needs to be based on knowledge, and it should be transparent and ethical, too. This is sometimes not easy to achieve. Based on your experience, how challenging is it to meet the following aspects when communicating with stakeholders? Scale 1 (Never challenging) – 5 (Always challenging). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, $p \leq 0.01$).

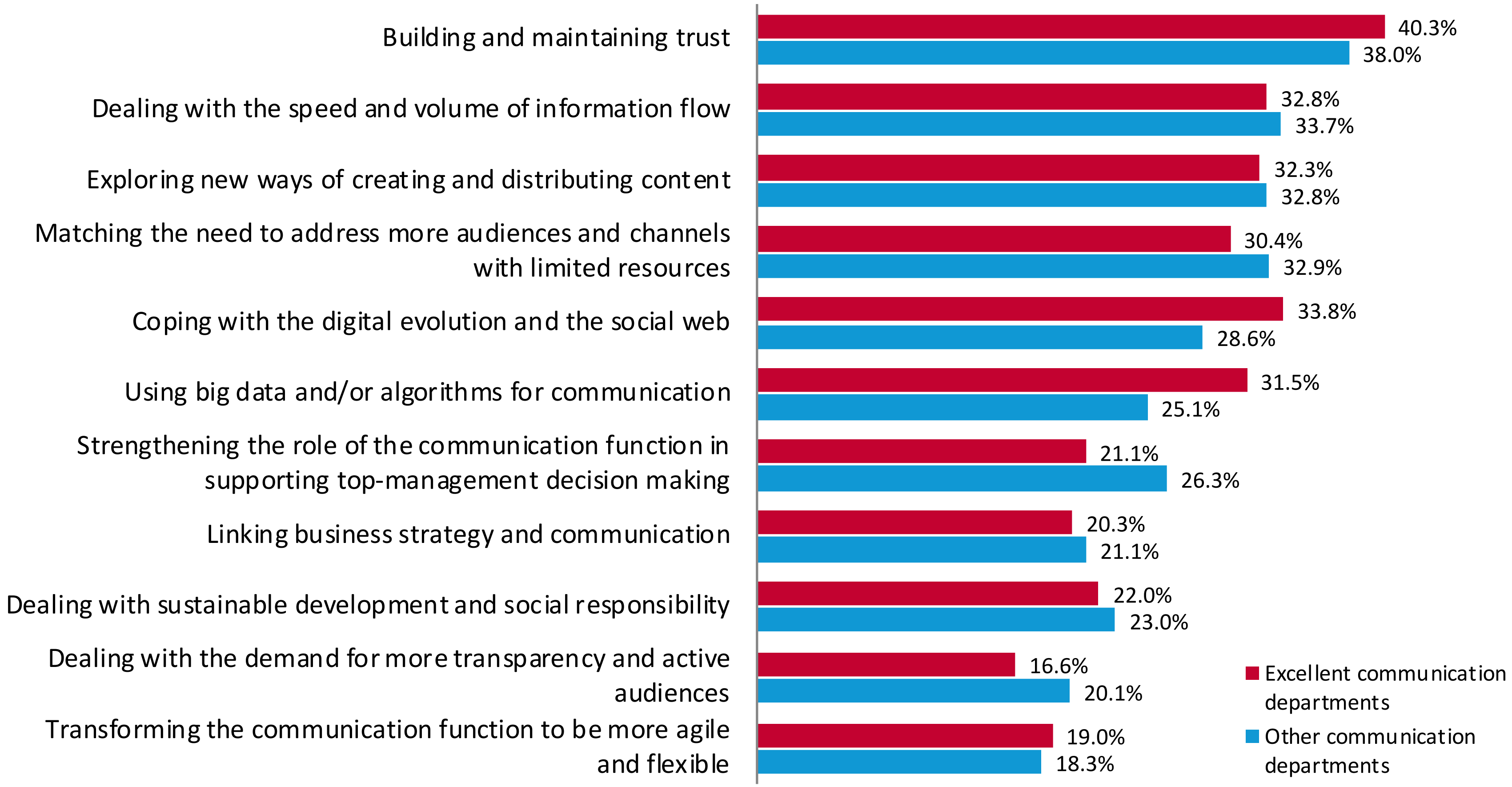
Excellent communication departments find it less difficult to be transparent – especially about political standpoints, governance and external impacts



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 1,842 communication professionals in communication departments across Europe. Q 7: Transparency can enhance trust. But some information might not be accessible to communication professionals, and some facts may not be suitable for sharing publicly. How difficult is it for your organisation to be transparent about: … Scale 1 (Not difficult) – 5 (Very difficult). Mean values. ** Highly significant differences (independent samples T-Test, p ≤ 0.01).* Significant differences (independent samples T-Test, p ≤ 0.05).

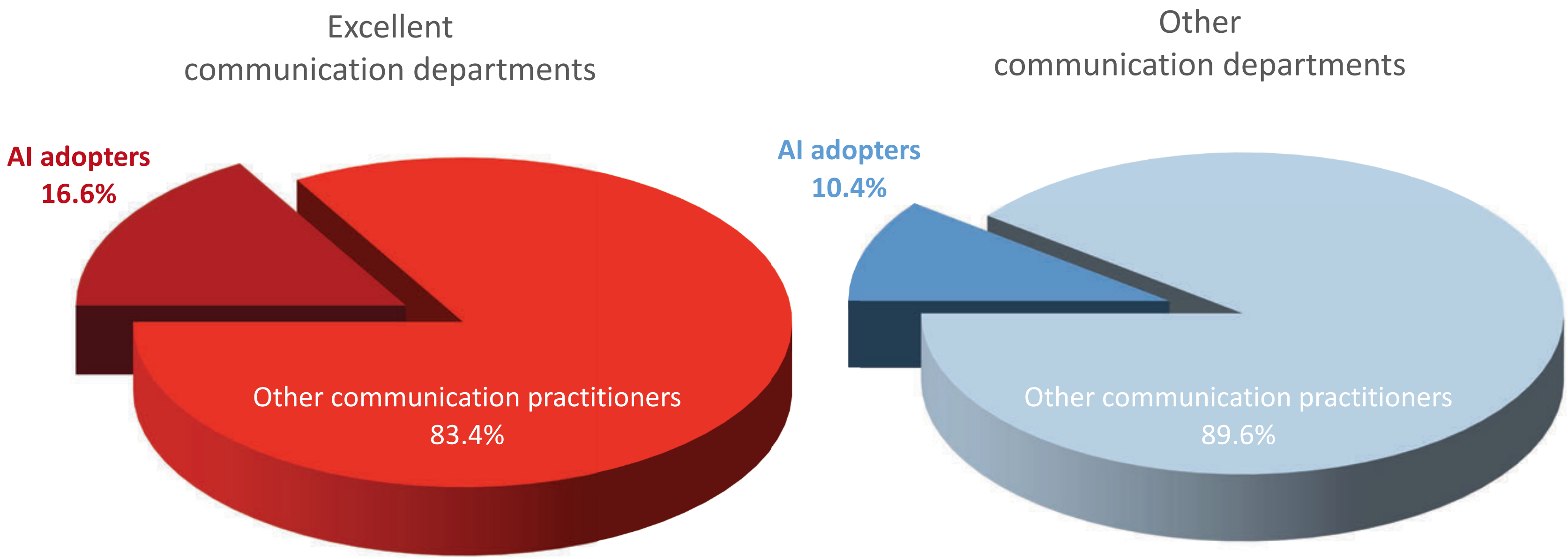
Strategic issues: Excellent communication departments are better aligned with top management and they put more emphasis on digitalization and algorithms

Most important strategic issues for communication management until 2022



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 1,892 communication professionals in communication departments across Europe. Q 8: 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.

Personal use of Artifical Intelligence is much higher amongst professionals working in excellent communication departments



AI adopters

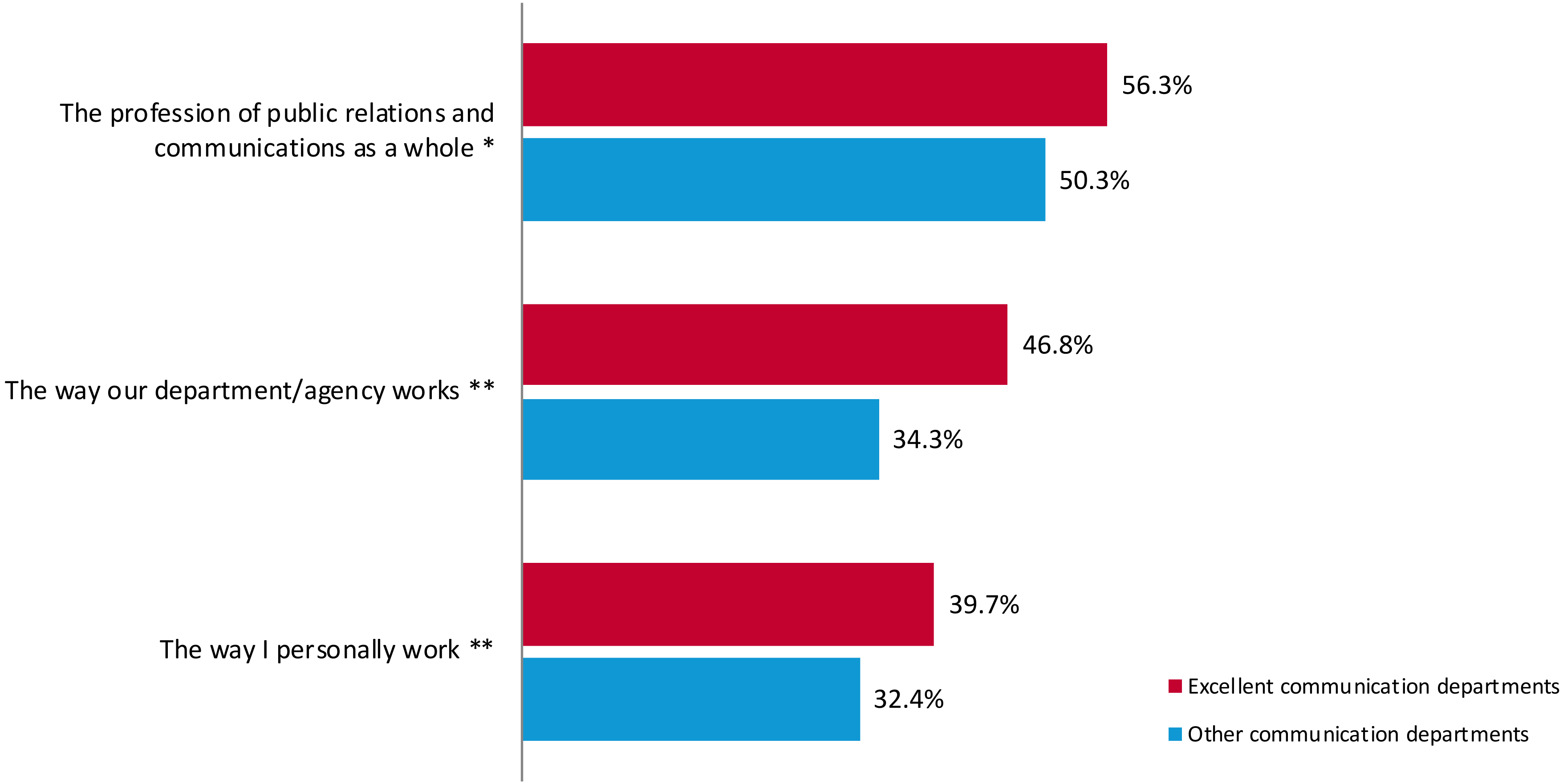
Communication practitioners using

- intelligent assistants on their smartphones and
- intelligent devices in their home or office

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 1,892 communication professionals in communication departments across Europe. Q 29: Do you use intelligent assistants on your smartphone (e.g. Siri, Google Assistant)? Yes / No / I don't know/not available to me. Q 30: Do you use intelligent devices in your home or office (e.g. Amazon Echo with Alexa, Google Home, Apple HomePod)? Yes / No / I don't know/not available to me.

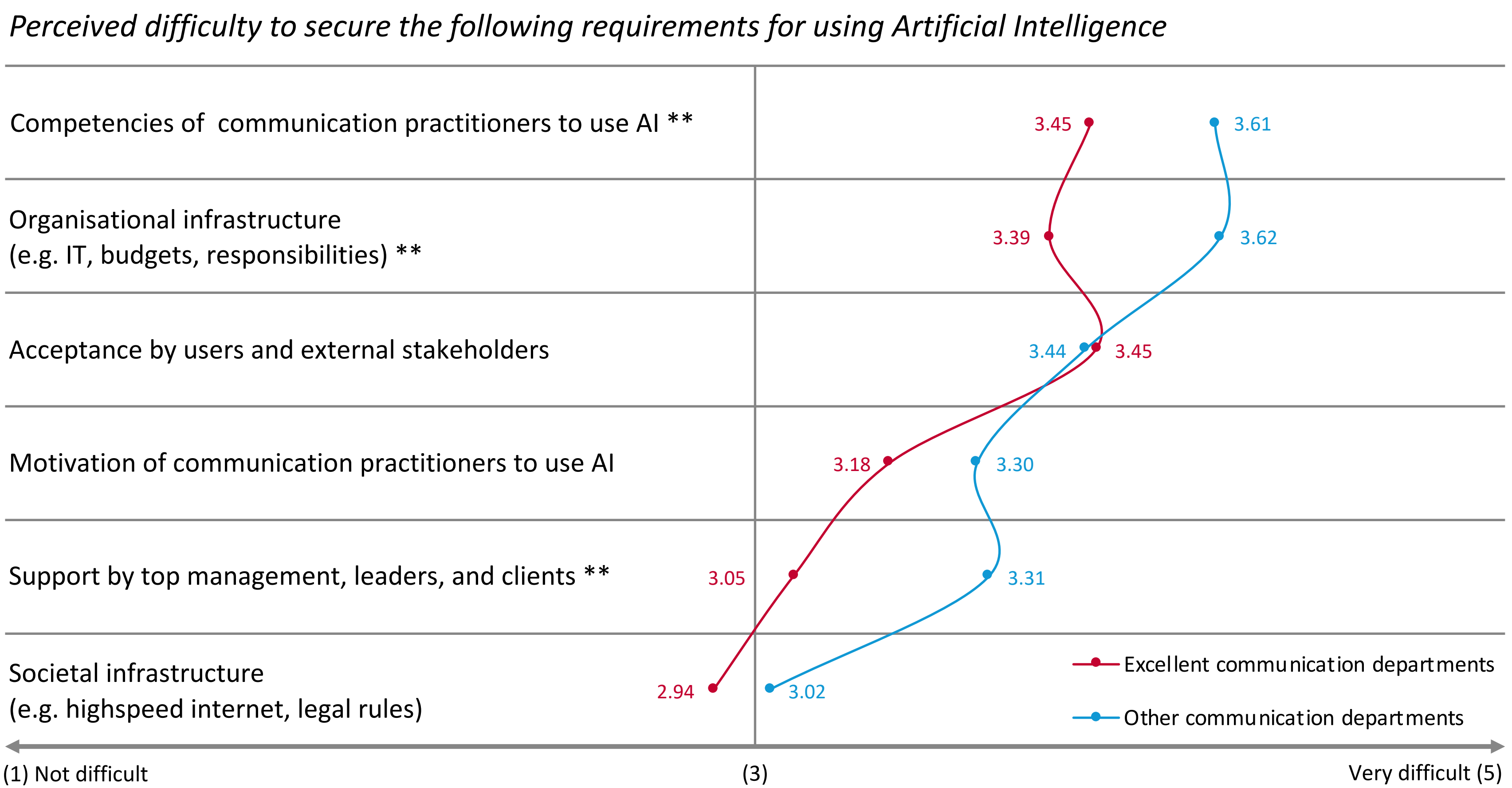
Excellent communication departments predict a stronger impact of AI at all levels

Artificial Intelligence will have impact on ...



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 1,360 communication professionals in communication departments across Europe. Q 9: Artificial Intelligence is becoming part of everyday life, for example in language-based assistants (Apple Siri, Amazon Alexa) and algorithms used on news sites and e-commerce platforms. This might also impact communications. In your opinion, how much impact will Artificial Intelligence have on ... Scale 1 (Very low impact) – 5 (Very high impact). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, p ≤ 0.01). * Significant differences (chi-square test, p ≤ 0.05).

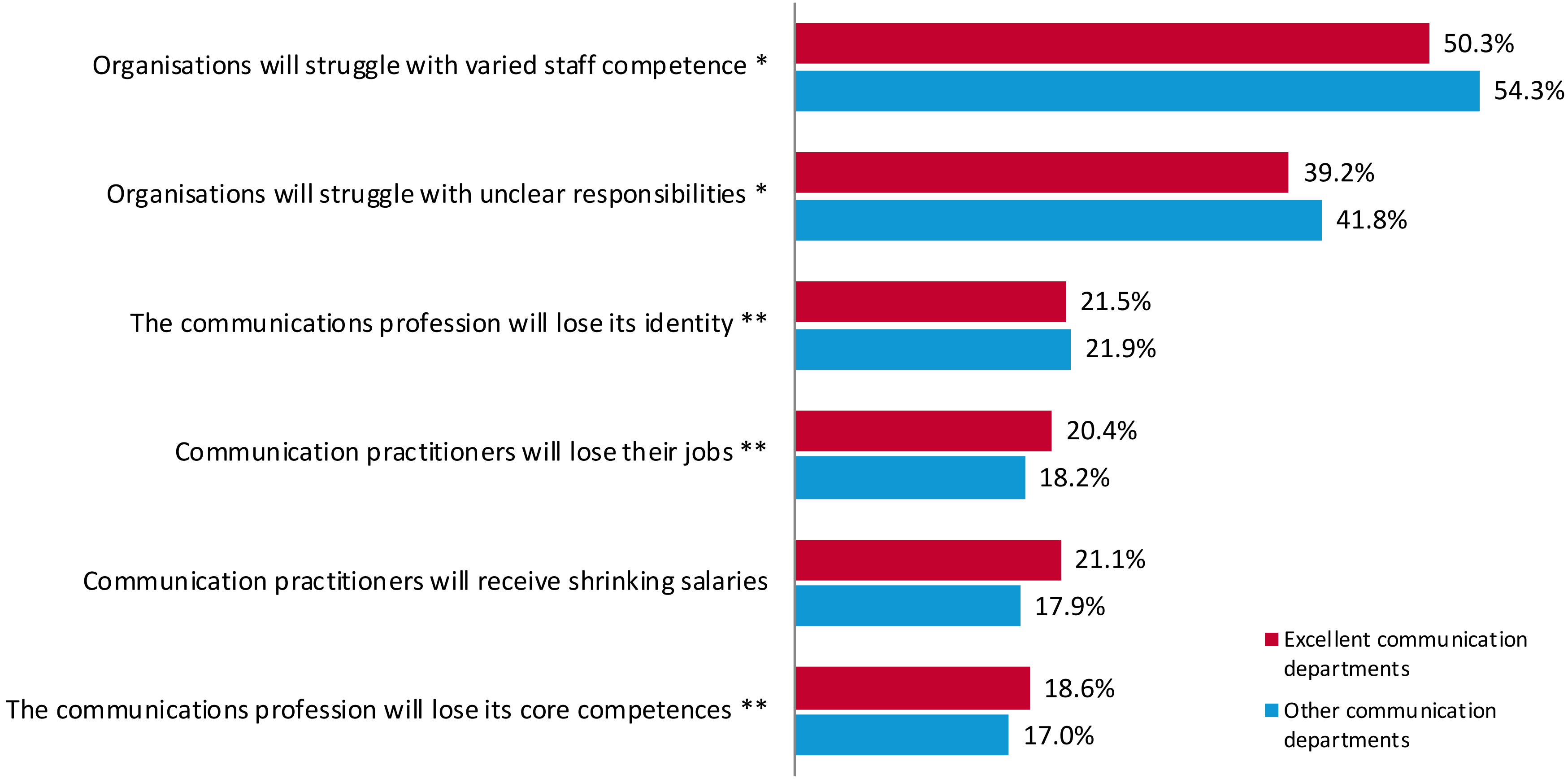
Excellent departments find it less hard to lay organisational and individual foundations to implement Artificial Intelligence in communications



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 1,811 communication professionals in communication departments across Europe. Q 11: Artificial Intelligence (AI) can be described as flexible decision-making processes and actions of software-driven agents. They adapt to changing goals and unpredictable situations, learn from experience, and are based on technologies like natural language processing, data retrieval and knowledge representation, semantic reasoning, and machine learning. Taking this definition into account and thinking of your organisation, how difficult is it to secure the following requirements for using AI in communications? Scale 1 (Not difficult) – 5 (Very difficult). Mean values. ** Highly significant differences (Independent samples T-Test, p ≤ 0.01).

Professionals working in excellent departments expect less organisational risks induced by AI, but more negative consequences for practitioners and the profession

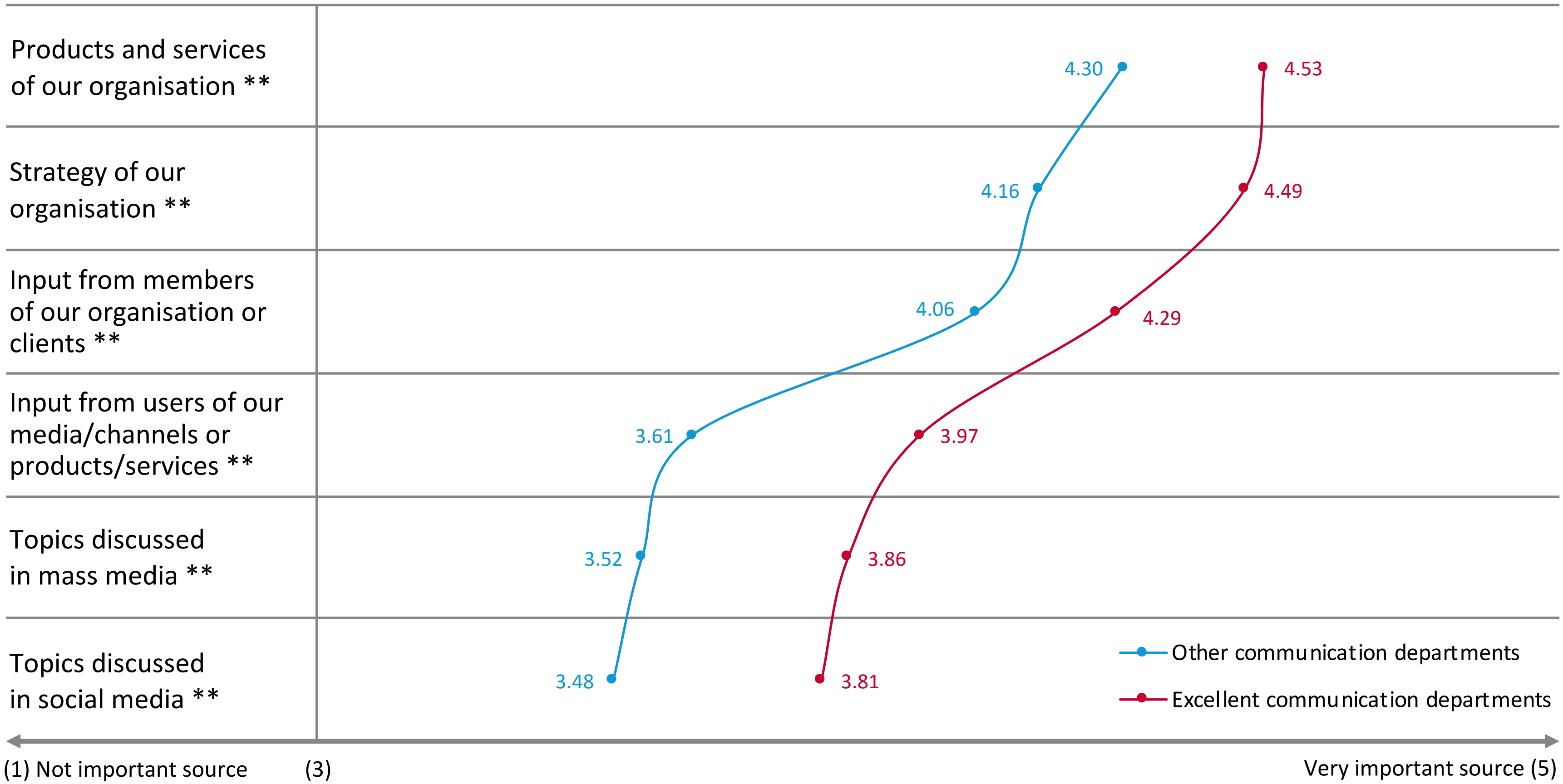
Perceived likeliness of risks induced by Artificial Intelligence



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 1,811 communication professionals in communication departments across Europe. Q 12: What could be possible risks that Artificial Intelligence brings to communications? Scale 1 (Not likely) – 5 (Very likely). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, p ≤ 0.01). * Significant differences (chi-square test, p ≤ 0.05).

Excellent communication departments utilise all kinds of external and internal sources more intensively when creating content

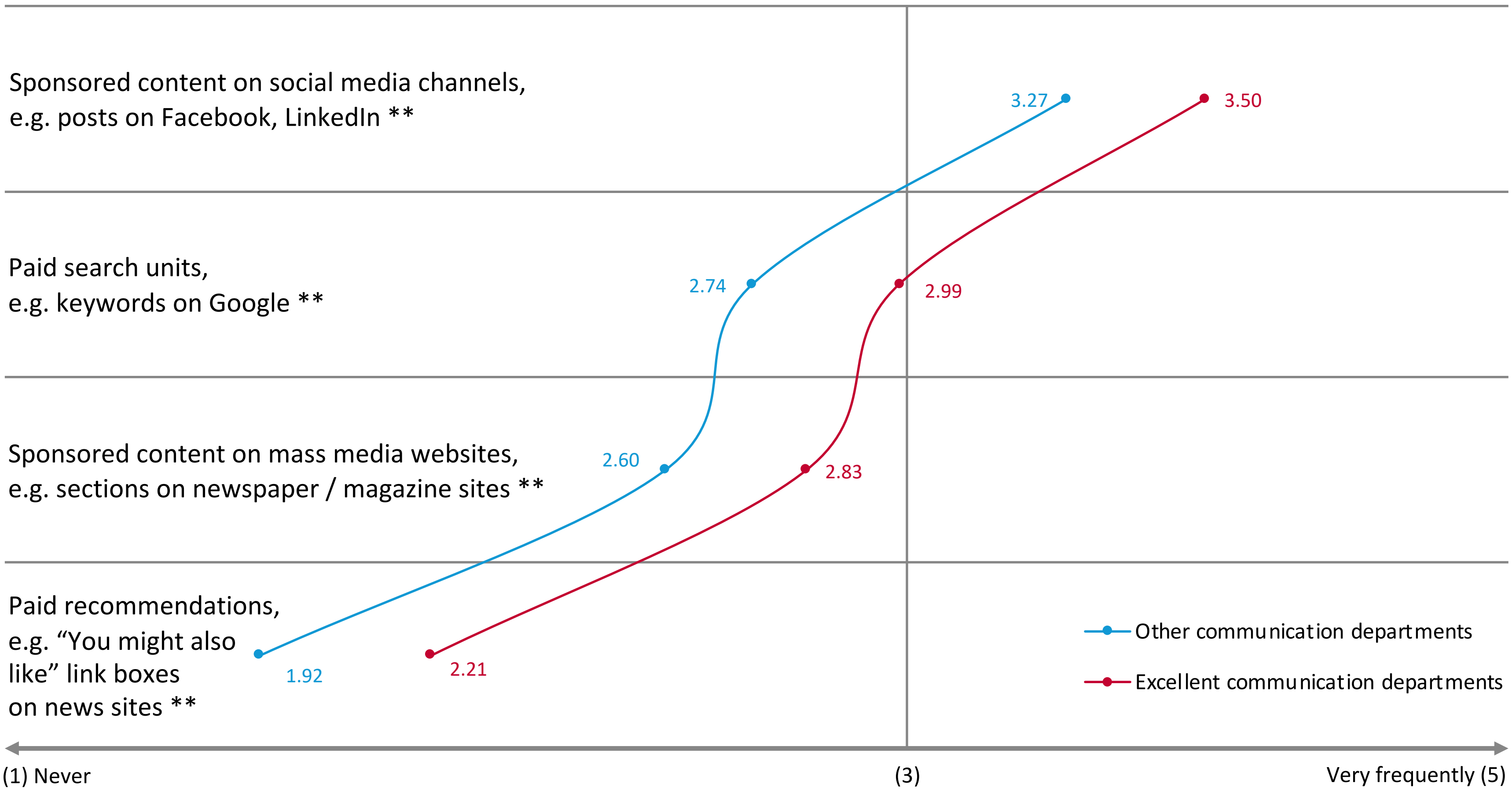
Sources used for creating content in the daily work of communication departments/agencies



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 1,892 communication professionals in communication departments across Europe. Q 13: Content is a key asset in strategic communication and public relations. Ideas and inspiration for it might come from different angles. In your daily work and the work of colleagues in your department/agency,how important are the following sources when creating content? Scale 1 (Not important source) – 5 (Very important source). Mean values. ** Highly significant differences (Independent sample T-Test, p ≤ 0.01).

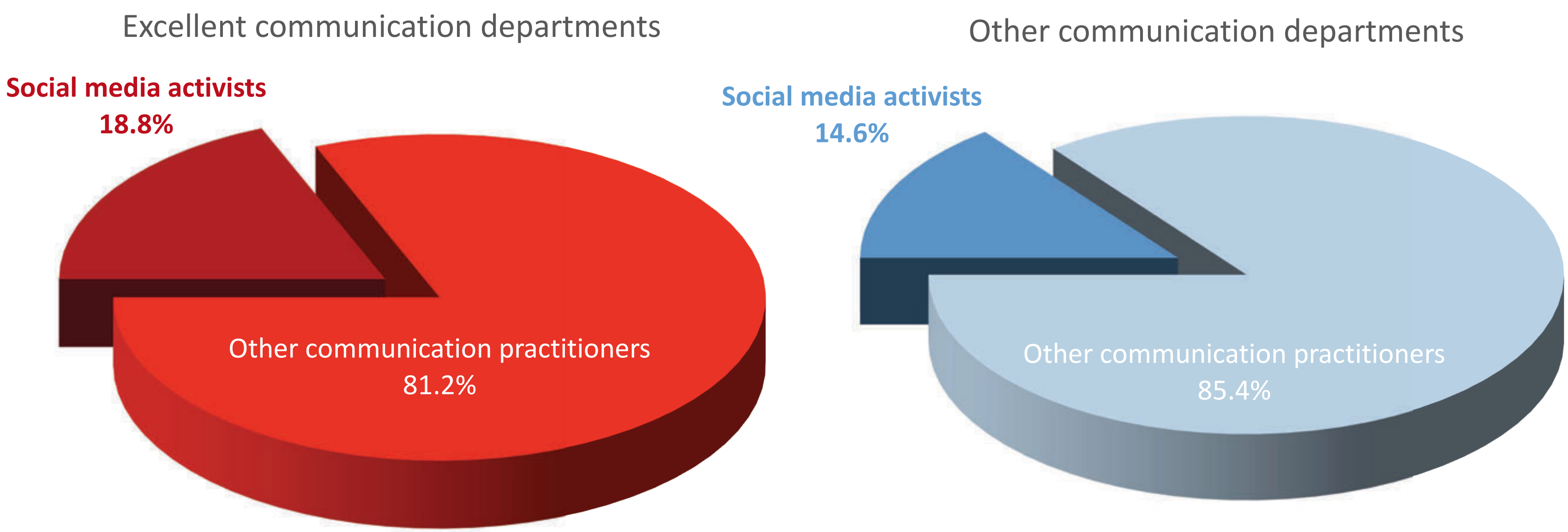
Excellent departments use paid communication like sponsored content more often

Frequently used ways to spread content



www.communicationmonitor.eu / Zerfass et al. 2019 / n = 1,812 communication professionals in communication departments across Europe. Q 15: How often does your department use the following ways to spread content? Scale 1 (Never) – 5 (Very frequently). Mean values. ** Highly significant differences (independent samples T-Test, p ≤ 0.01).

Professionals working in excellent communication departments are more active on social media



Social media activists

Communication practitioners

- posting professional content on external/public media
- at least daily
- on at least two social media platforms
- using their own name

www.communicationmonitor.eu / Zerfass et al. 2019 / n = 1,892 communication professionals in communication departments across Europe. Q 27: Which social media platforms do you use to post content about professional issues or your business/organisation using your own name? Q 28: How often do you post professional content on external/public social media (Twitter etc.) using your own name?

References

Albu, O. B., & Flyverbom, M. (2019). Organizational transparency: Conceptualizations, conditions, and consequences. *Business & Society, 58*(2), 268-297.

Anand, V., & Rosen, C. C. (2008). The ethics of organizational secrets. *Journal of Management Inquiry, 17*(2), 97-101.

Andersson, R. (2019). Employee communication responsibility: Its antecedents and implications for strategic communication management. *International Journal of Strategic Communication, 13*(1), 60-75.

Arthur W. Page Society, & Business Roundtable Institute for Corporate Ethics (2009). *The dynamics of public trust in business — Emerging opportunities for leaders. A call to action to overcome the present crisis of trust in business.* New York, NY: A. W. Page Society. Retrieved from http://bit.ly/ecm2019ref1 [04.05.2019].

Bentele, G., & Seidenglanz, R. (2004). *Das Image der Image-Macher. Eine repräsentative Studie zum Image der PR-Branche in der Bevölkerung und eine Journalistenbefragung.* Leipzig: Universität Leipzig.

Bentele G., & Seidenglanz R. (2008). Trust and credibility — Prerequisites for communication management. In A. Zerfass, B. van Ruler & K. Sriramesh (Eds.), *Public relations researc*h (pp. 49-62). Wiesbaden: VS Verlag für Sozialwissenschaften.

Boss, R. W. (1978). Trust and managerial problem solving revisited. *Group and Organization Studies, 3*(3), 331-342.

Brito, M. (2013). *Your brand, the next media company.* Indianapolis, IN: Que.

Burcher, N. (2012). *Paid, owned, earned: maximizing marketing returns in a socially connected world.* London: Kogan Page.

Christensen, L. T. (2002). Corporate communication: The challenge of transparency. *Corporate Communications: An International Journal, 7*(3), 162-168.

Christensen, L. T., & Cornelissen, J. (2015). Organizational transparency as myth and metaphor. *European Journal of Social Theory*, *18*(2), 132-149.

Columbia Encyclopedia (2018). *Europe.* Retrieved from http://bit.ly/ecm201ref4 [04.05.2019].

Commission européenne (2018). *Eurobaromètre Standard 90 – Automne 2018: Les habitudes médiatiques dans l'Union européenne* (Rapport, Novembre 2018). Brussels: Commission européenne, Direction générale communication. Retrieved from http://bit.ly/ecm2019ref2 [04.05.2019].

Committee for Economic Development (1971). *Social responsibilities of business corporations.* New York, NY: Committee for Economic Development.

Dentsu Aegis Network (2019). *Global ad spends forecast – January 2019.* London: Dentsu Aegis. Retrieved from http://bit.ly/ecm2019ref3 [04.05.2019].

Dietrich, C. (2018). *An introduction to the PESO model*. New York, NY: PRSA. Retrieved from http://bit.ly/ecm2019ref4 [04.05.2019].

Edelman (2007). *Edelman Trust Barometer 2007.* Retrieved from http://bit.ly/ecm2019ref5 [04.05.2019].

Edelman (2019). *2019 Edelman Trust Barometer.* Retrieved from http://bit.ly/ecm2019ref6 [04.05.2019].

Edelman, D., & Salsberg, B. (2010). Beyond paid media: Marketing's new vocabulary. *McKinsey Quarterly* (Nov. 2010), 1-8.

European Union (2019). *About the EU: Countries.* Retrieved from http://bit.ly/ecm2019ref7 [04.05.2019].

Freberg, K. (2019). *Social media for strategic communication.* Thousand Oaks, CA: Sage.

Galloway, C., & Swiatek, L. (2018). Public relations and artificial intelligence: It's not (just) about robots. *Public Relations Review, 44*(5), 734-740.

References

Gensch, P. (2019). *AI in marketing, sales and service.* Cham: Palgrave Macmillan.

Golembiewski, R. T., & McConkie, M. (1975). The centrality of interpersonal trust in group processes. In C. L. Cooper (Ed.), *Theories of group process* (pp. 131-185). London: Wiley.

Harris, J. D., & Wicks, A. C. (2010). 'Public trust' and trust in particular firm-stakeholder interactions. *Corporate Reputation Review, 13*(2), 142-154.

Heide, M., Simonsson, C., Nothhaft, H., Andersson, R., & von Platen, S. (2019). *The communicative organization.* Retrieved from http://bit.ly/ecm2019ref8 [04.05.2019].

Hoffjann, O., & Seidenglanz, R. (Eds.) (2018). *Allmächtige PR, ohnmächtige PR. Die doppelte Vertrauenskrise der PR.* Wiesbaden: Springer VS.

Holtzhausen, D., & Zerfass, A. (Eds.) (2015). *The Routledge handbook of strategic communication.* New York, NY: Routledge.

Jeffers, D. W. (1977). Performance expectations as a measure of relative status of news and PR people. *Journalism Quarterly, 54*(2), 299-306.

Khamis, S., Ang, L., & Welling, R. (2017). Self-branding, 'micro-celebrity' and the rise of social media influencers. *Celebrity Studies, 8*(2), 191–208.

Larsson, L. (2007). Public trust in the PR industry and its actors. *Journal of Communication Management, 11*(3), 222-234,

Macnamara, J., Lwin, M. O., Adi, A., & Zerfass, A. (2015). *Asia-Pacific Communication Monitor 2015/16. The state of strategic communication and public relations in a region of rapid growth. Survey results from 23 countries.* Hong Kong: APACD.

Macnamara, J., Lwin, M. O., Adi, A., & Zerfass, A. (2016). 'PESO' media strategy shifts to 'SOEP': Opportunities and ethical dilemmas. *Public Relations Review, 42*(3), 377-385.

Macnamara, J., Lwin, M. O., Adi, A., & Zerfass, A. (2017). *Asia-Pacific Communication Monitor 2017/18. Strategic challenges, social media and professional capabilities – Results of a survey in 22 countries.* Hong Kong: APACD.

Makridakis, S. (2017). The forthcoming Artificial Intelligence revolution: Its impact on society and firms. *Futures, 90,* 46-60.

Meng, J., Reber, B. H., Berger, B. K., Gower, K. K., & Zerfass, A. (2019). *North American Communication Monitor 2018-2019. Tracking trends in fake news, issues management, leadership performance, work stress, social media skills, job satisfaction and work environment.* Tuscaloosa, AL: The Plank Center for Leadership in Public Relations.

Moreno, A., Molleda, J. C., Álvarez Nobell, A. Herrera, M., Athaydes, A. y Suárez, A. M. (2019). *Latin American Commuication Monitor 2018-2019. Comunicación estratégica y sus retos: fake news, confianza, información para la toma de decisiones, liderazgo y compromiso laboral. Resultados de una encuesta en 19 países.* Madrid: EUPRERA/DIRCOM.

Moreno, A., Molleda, J. C., Athaydes, A., & Suárez, A. M. (2015). *Latin American Communication Monitor 2015. Excelencia en comunicación estratégica, trabajo en la era digital, social media y profesionalización. Resultados de una encuesta en 18 países.* Brussels: EUPRERA.

Moreno, A., Molleda, J. C., Athaydes, A., & Suárez, A. M. (2017). *Latin American Communication Monitor 2016-2017. Tendencias en comunicación estratégica: big data, automatización, engagement, influencers, couching y competencias. Resultados de una encuesta en 17 países.* Madrid: DIRCOM/EUPRERA.

References

Newman, N., Fletcher, R., Kalogeropoulos, A., Levy, D. A. L., & Nielsen, R. K. (2017). Reuters Institute Digital News Report 2017. Oxford: University of Oxford. Retrieved from http://bit.ly/ecm2019ref9 [04.05.2019].

Niederhäuser, M., & Rosenberger, N. (2018). *Kommunikation in der digitalen Transformation. Bestandsaufnahme und Entwicklungsbedarf des strategischen Kommunikationsmanagements von Wirtschaftsunternehmen, Verwaltungen und Non-Profit-Organisationen in der Schweiz.* Winterthur: ZHAW. Retrieved from https://doi.org/10.21256/zhaw-3866 [04.05.2019].

Nothhaft, H., Verčič, D., Werder, K. P., & Zerfass, A. (Eds.) (2019). *Future directions of strategic communication.* New York, NY: Routledge.

Okay, A. (Ed.) (2016). *Trust in communication management.* New York, NY: Peter Lang.

Poole, D. L., & Mackworth, A. K. (2017). *Artificial intelligence: Foundations of computational agents* (2nd ed.). New York, NY: Oxford University Press.

Pulizzi, J. (2014). *Epic Content Marketing.* New York, NY: McGraw-Hill.

Rawlins, B. L. (2007). *Trust and PR Practice.* Gainesville, FL: Institute for Public Relations. Retrieved from http://bit.ly/ecm2019ref10 [04.05.2019].

Russell, S. J., & Norvig, P. (2016). *Artificial intelligence: A modern approach. Global edition* (3rd ed.). Harlow: Pearson Education.

Ryan, M., & Martinson, D. L. (1988). Journalists and public relations practitioners: Why the antagonism? *Journalism Quarterly, 65*(1), 131-140.

Sallot, L. M., & Johnson, E. A. (2006). Investigating relationships between journalists and public relations practitioners: Working together to set, frame and build public agenda, 1991-2004. *Public Relations Review, 32*(2), 151-159.

Schnackenberg, A. K., & Tomlinson, E. C. (2016). Organizational transparency: A new perspective on managing trust in organization-stakeholder relationships. *Journal of Management, 42*(7), 1784-1810.

Schwab, K. (2018). *The fourth industrial revolution*. Geneva: World Economic Forum.

Tench, R., Verčič, D., Zerfass, A., Moreno, A., & Verhoeven, P. (2017). *Communication Excellence. How to develop, manage and lead exceptional communications*. Cham: Palgrave Macmillan.

Thakor, A. V. (2015). Strategic information disclosure when there is fundamental disagreement. *Journal of Financial Intermediation, 24(2),* 131-153.

Verčič, D. (2000). *Trust in organizations: A study of the relations between media coverage, public perceptions and profitability* (Unpublished doctoral dissertation). London: The London School of Economics and Political Science, University of London.

Verčič, D., & Tkalac Verčič, A. (2016). The new publicity: From reflexive to reflective mediatisation. *Public Relations Review, 42*(2), 493-498.

Verčič, D., & Zerfass, A. (2016). A comparative excellence framework for communication management. *Journal of Communication Management, 20*(4), 270-288.

Wojdynski, B. W., & Golan, G. J. (2016). Native Advertising and the future of mass communication. *American Behavioral Scientist, 60*(12), 1403-1407.

Zand, D. E. (1972). Trust and managerial problem solving. *Administrative Science Quarterly, 17*(2), 229-239.

Zerfass, A., Moreno, A., Tench, R., Verčič, D., & Verhoeven, P. (2008). *European Communication Monitor 2008. Trends in Communication Management and Public Relations – Results and implications.* Leipzig: University of Leipzig/EUPRERA.

References

Zerfass, A., Moreno, A., Tench, R., Verčič, D., & Verhoeven, P. (2009). *European Communication Monitor 2009. Trends in Communication Management and Public Relations. Results of a survey in 34 countries.* Brussels: EACD/EUPRERA.

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.

Zerfass, A., Moreno, A., Tench, R., Verčič, D., & 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: EACD/EUPRERA, Quadriga Media Berlin.

Zerfass, A., Ruler, B. van, Rogojinaru, A., Verčič, D., & Hamrefors, S. (2007). *European Communication Monitor 2007. Trends in Communication Management and Public Relations – Results and implications.* Leipzig: University of Leipzig/EUPRERA.

Zerfass, A., Tench, R., Vercic, D., Verhoeven, P., & Moreno, A. (2014). *European Communication Monitor 2014. Excellence in Strategic Communication – Key issues, leadership, gender and mobile media. Results of a survey in 42 countries.* Brussels: EACD/EUPRERA, Helios Media.

Zerfass, A., Tench, R., Verhoeven, P., Verčič, D., & Moreno, A. (2010). *European Communication Monitor 2010. Status quo and challenges for Public Relations in Europe. Results of an empirical survey in 46 countries.* Brussels: EACD/EUPRERA.

Zerfass, A., Verčič, D., Verhoeven, P., Moreno, A., & Tench, R. (2012). *European Communication Monitor 2012. Challenges and competencies for Strategic Communication. Results of an empirical survey in 42 countries.* Brussels: EACD/EUPRERA.

Zerfass, A., Tench, R., Verhoeven, P., Verčič, D., & Moreno, A. (2018). *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.* Brussels: EACD/EUPRERA, Quadriga Media Berlin.

Zerfass, A., Verčič, D., Verhoeven, P., Moreno, A., & Tench, R. (2015). *European Communication Monitor 2015. Creating communication value through listening, messaging and measurement. Results of a survey in 41 countries.* Brussels: EACD/EUPRERA, Helios Media.

Zerfass, A., Verhoeven, P., Moreno, A., Tench, R., & Verčič, D. (2016). *European Communication Monitor 2016. Exploring trends in big data, stakeholder engagement and strategic communication. Results of a survey in 43 countries.* Brussels: EACD/EUPRERA, Quadriga Media.

Zerfass, A., Verhoeven, P., Tench, R., Moreno, A., & Verčič, D. (2011). *European Communication Monitor 2011. Empirical insights into Strategic Communication in Europe. Results of an empirical survey in 43 countries.* Brussels: EACD/EUPRERA.

Zerfass, A., & Viertmann, C. (2016). Multiple voices in corporations and the challenge for strategic communication. In K. Alm, M. Brown & S. Røyseng (Eds.), *Kommunikasjon og ytringsfrihet i organisasjoner* (pp. 44-63). Oslo: Cappelen Damm.

CISION® Insights

CISION INSIGHTS' PROVIDES STRATEGIC AND ACTIONABLE INSIGHTS TO MANAGE MEDIA RELATIONS, REPUTATION AND ISSUES.

The Cision Insights' approach is unique. It combines three crucial elements to provide users with custom, measurement programs for their unique needs.

Sector experts ensure insights are supported by a team with in-depth understanding of our clients and their industries.

Our platforms and tools, the Intelligence Suite, enables strategic guidance to be delivered at the speed of business.

Dedicated consultants provide answers to not only »what happened« and »why it happened« but also »what can be done about it«.

QUANTITATIVE MEASUREMENT PROGRAMS, VISUALIZATION, AND QUALITATIVE MEDIA ANALYSIS FROM A GLOBAL TEAM OF INDUSTRY EXPERTS.

Built-In Industry Intelligence

- Deep industry sector knowledge & expertise
- Human-coded, dictionary tags & industry filters
- Proprietary text analysis technology

Cross Channel Perspective

- 9,000+ Print Media across 75 Markets
- 2,500+ Broadcast Stations across 50 Markets
- 100,000+ URLs for Online News and Blogs across 180 Markets
- All Major Social Networks

Real-Time Monitoring

- 2+ years of accessible data
- Filters through 1B+ documents in live system
- Processes 20M more documents per month
- All on dashboards that only take seconds to load

Flexible Reporting Modules

- Individualized analytics
- Tailored reporting
- Customized interfaces
- Carefully selected teams of consultants

To learn more contact us at info.de@cision.com

Or visit us at www.cision.de

Survey organisers

European Public Relations Education and Research Association (EUPRERA)

The European Public Relations Education and Research Association (EUPRERA) is an autonomous organisation with nearly 500 members from 40 countries interested in advancing academic research and knowledge in strategic communication. Several cross-national and comparative research and education projects are organised by affiliated universities, and a highly regarded academic congress is staged each autumn at varying locations.

www.euprera.org

European Association of Communication Directors (EACD)

The EACD aims to attract, inspire and engage current and future communication leaders to drive excellence in the profession. It offers communication professionals a platform to connect, deepen their expertise, share best practice, establish and promote relevant standards. The EACD organises the European Communication Summit each spring. It has currently more than 2,000 members.

www.eacd-online.eu

Communication Director (Media partner)

Communication Director is a quarterly international magazine for Corporate Communications and Public Relations. It documents opinions on strategic questions in communication, highlights transnational developments and discusses them from an international perspective. The magazine is published by Quadriga Media, a specialist publishing house based in Berlin and Brussels.

www.communication-director.eu

Partners

Cision Insights and PRIME Research are part of the Cision Group, a leading global provider of earned media management software and media insights, making a difference at over 500 companies and brands around the world. Cision has over 4,000 employees with offices in 15 countries throughout the Americas, EMEA, and APAC.
Premium Partner – www.cision.de, www.cision.com

As a specialist for the communication of change and technological transformation, Fink & Fuchs has been the strategic partner for companies, associations and public clients for 30 years. The agency, based in Wiesbaden, Munich and Berlin, has been awarded three times as the agency of the year in Germany.
Digital Communications Partner – www.finkfuchs.de/en/

The Centre for Corporate Communication (BI CCC) at BI Norwegian Business School, Oslo, facilitates innovative and creative processes of discovery and understanding to shape the future of corporate communication in Norway.
National research partner for Norway – *http://bit.ly/BI-CCC*

The Center for Strategic Communication (Centro per la Comunicazione Strategica – CECOMS) at Università IULM in Milan, is committed to basic and applied research on how strategic communication and PR create value within and for complex organisations.
National research partner for Italy – *www.cecoms.it*

National contacts

EUPRERA – National research collaborators

Please contact the universities listed here for presentations, insights or additional analyses in key countries.

Austria	Prof. Dr. Sabine Einwiller	University of Vienna	sabine.einwiller@univie.ac.at
Belgium	Prof. Dr. Sandrine Roginsky	University Catholique de Louvain	sandrine.roginsky@uclouvain.be
Belgium	Anne-Marie Cotton	Artevede University of Applied Sciences	am.cotton@arteveldehs.be
Bulgaria	Prof. Dr. Milko Petrov	Sofia University St. Kliment Ohridski	milko_petrov@yahoo.com
Croatia	Prof. Dr. Ana Tkalac Verčič	University of Zagreb	atkalac@efzg.hr
Czech Republic	Dr. Denisa Hejlova	Charles University Prague	hejlova@fsv.cuni.cz
Denmark	Prof. Finn Frandsen	Aarhus University	ff@asb.dk
Finland	Prof. Dr. Vilma Luoma-aho	University of Jyväskylä	vilma.luoma-aho@jyu.fi
France	Prof. Dr. Valerié Carayol	University Michel de Montaigne Bordeaux 3	valerie.carayol@u-bordeaux3.fr
Germany	Prof. Dr. Ansgar Zerfass	Leipzig University	zerfass@uni-leipzig.de
Greece	Dr. Clio Kenterelidou	Aristotle University of Thessaloniki	ckent@jour.auth.gr
Ireland	Dr. John Gallagher	Dublin Institute of Technology	drjohnpgallagher@gmail.com
Italy	Prof. Emanuele Invernizzi	IULM University Milan	emanuele.invernizzi@iulm.it
Netherlands	Assoc. Prof. Dr. Piet Verhoeven	University of Amsterdam	p.verhoeven@uva.nl
Norway	Prof. Dr. Oyvind Ihlen	University of Oslo	oyvind.ihlen@media.uio.no
Norway	Ass. Prof. Dr. Alexander Buhmann	BI Norwegian Business School, Oslo	alexander.buhmann@bi.no
Poland	Assoc. Prof. Dr. Waldemar Rydzak	Poznan University of Economics	waldemar.rydzak@ue.poznan.pl
Portugal	Prof. Dr. Sonia Sebastiao	ISCSP and CAPP (University of Lisbon)	ssebastiao@iscsp.ulisboa.pt
Romania	Prof. Dr. Alexandra Craciun	University of Bucharest	alexandra.craciun@litere.unibuc.ro
Russia	Assoc. Prof. Dr. Marina Shilina	Higher School of Economics Moscow	marina.shilina@gmail.com
Serbia	Assoc. Prof. Dr. Danijela Lacic	University of Novi Sad	danijelalalic@uns.ac.rs
Slovenia	Prof. Dr. Dejan Verčič	University of Llubljana	dejan.vercic@fdv-uni-lj.si
Spain	Prof. Dr. Ángeles Moreno	University Rey Juan Carlos, Madrid	mariaangeles.moreno@urjc.es
Sweden	Prof. Dr. Jesper Falkheimer	Lund University, Campus Helsingborg	jesper.falkheimer@ch.lu.se
Switzerland	Prof. Dr. Ansgar Zerfass	Leipzig University	zerfass@uni-leipzig.de
Turkey	Prof. Dr. Ayla Okay	Istanbul University	aylaokay@istanbul.edu.tr
United Kingdom	Prof. Dr. Ralph Tench	Leeds Beckett University	r.tench@leedsbeckett.ac.uk

Authors and research team

- **Prof. Dr. Ansgar Zerfass** | Lead researcher
  Professor and Chair of Strategic Communication, Leipzig University, Germany
  Professor of Communication and Leadership, BI Norwegian Business School, Norway
- **Prof. Dr. Dejan Verčič**
  Professor of Public Relations, University of Ljubljana, Slovenia
- **Prof. Dr. Piet Verhoeven**
  Associate Professor of Corporate Communication, University of Amsterdam, Netherlands
- **Prof. Dr. Ángeles Moreno**
  Professor of Public Relations and Communication Management, University Rey Juan Carlos, Madrid, Spain
- **Prof. Dr. Ralph Tench**
  Professor of Communication, Leeds Beckett University, United Kingdom

Statistical analysis and assistant researchers

- **Jens Hagelstein**, Leipzig University, Germany (Project Manager)
- **Dr. Ronny Fechner**, Leipzig, Germany (Data Manager)

Additional resources: Online benchmarks, Excellence book, previous ECM reports

Benchmarks: Do you want to use the insights for yourself? Visit www.communicationmonitor.eu to benchmark yourself and your organisation against comprehensive data from the monitor studies. New topics will be made available every three months.

Reports: The website www.communicationmonitor.eu also provides free access to full reports for 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 communication management with sound empirical standards.

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. Zerfass, A. Moreno & P. Verhoeven
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 Pharma Communications, Roche Group, Basel, Switzerland)

The European Communication Monitor is an international research initiative conducted by the European Public Relations Education and Research Association (EUPRERA) and the European Association of Communication Directors (EACD) in partnership with Cision Insights, Fink & Fuchs and Communication Director magazine.

The annual study has been conducted since 2007 with the aim to stimulate and promote the knowledge and practice of communication management across Europe.

More than 5,000 communication professionals from over 80 countries are surveyed in each wave of the European, Latin American, Asia-Pacific and North American Communication Monitor, making this the largest and only truly global study of the profession based on sound empirical standards.

ORGANISED BY:

euprera

EACD
EUROPEAN ASSOCIATION OF COMMUNICATION DIRECTORS

PARTNERS:

CISION Insights

Fink & Fuchs

COMMUNICATION DIRECTOR
THE MAGAZINE FOR CORPORATE COMMUNICATIONS AND PUBLIC RELATIONS