Status quo and trends of the communications profession in Europe
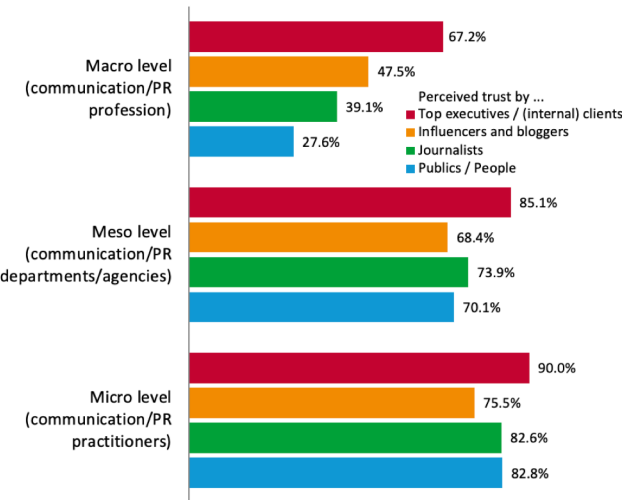## Results of a survey in 46 countries

The 2019 edition of the world's largest study into strategic communication and public relations has explored current practices and future developments of communications in companies, non-profits and other organisations including communication agencies across Europe. The full report, based on interviewing almost 2,700 communication leaders and practitioners, includes insights on trust in the PR profession, public trust in different organisational advocates, challenges of building trust and transparency, the most important strategic issues for the profession, Artificial Intelligence in communications, as well as content creation and distribution. Salaries, social media and AI expertise of practitioners, and characteristics of excellent communication departments are identified as well. Detailed analyses are available for 22 countries and different types of organisations.

Trust, digitalisation and content are key

The ranking of top issues challenging communication practitioners looks different than in previous years. Respondents were asked to pick their top three priorities, and the figure shows all that were mentioned by more than a quarter of the sample. **Enhancing trust** is number one, like it was in 2018. **Big data and algorithms** have gone up and are now a priority for 28% of the respondents, along with other aspects of digitalisation. **Creating and distributing content** is new in the list, while **linking business strategy and communication**, a top three issue for more than a decade, has dropped from 38% in 2018 to 24% this year.

Most important strategic issues until 2022	
Building and maintaining trust	37.9%
Dealing with the speed and volume of information flow	32.5%
Exploring new ways of creating and distributing content	31.6%
Matching the need to address more audiences and channels with limited resources	30.3%
Coping with the digital evolution and the social web	29.8%
Using big data and/or algorithms for communication	28.3%
Strengthening the role of the communication function in supporting top-management decision making	26.5%

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Perceived trust by ...
- Top executives / (internal) clients
- Influencers and bloggers
- Journalists
- Publics / People

Macro level (communication/PR profession): 67.2%, 47.5%, 39.1%, 27.6%

Meso level (communication/PR departments/agencies): 85.1%, 68.4%, 73.9%, 70.1%

Micro level (communication/PR practitioners): 90.0%, 75.5%, 82.6%, 82.8%

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Trust in the communications profession

Communicators experience a mixed level of trust in their profession and their work. They feel that the **communications and public relations profession** is only trusted by two third of top executives (67%), and by a minority of influencers and bloggers (47%), journalists (39%) and ordinary people (27%). Respondents are more positive about the perceived trust in their **departments or agencies**. 85% reported a positive attitude by executives or by clients, followed by 73% perceived trust from journalists, 70% from the general public and 68% from influencers and bloggers. Practitioners are the most positive about the perceived trust they enjoy **personally**. A vast majority feel trusted by their colleagues, bosses and internal clients, as well as by external stakeholders and audiences.

Challenges of building trust and transparency

Trust can originate from organisational openness and transparency. At the same time, transparent communication is often used as a buzzword and is difficult to achieve in practice. Practitioners report that transparency is the **biggest challenge** of trust-building communication. Respondents find it most difficult to communicate transparently about the **political stance of their leadership team** (41% think this is difficult) and about **internal processes and workflows** (35%).

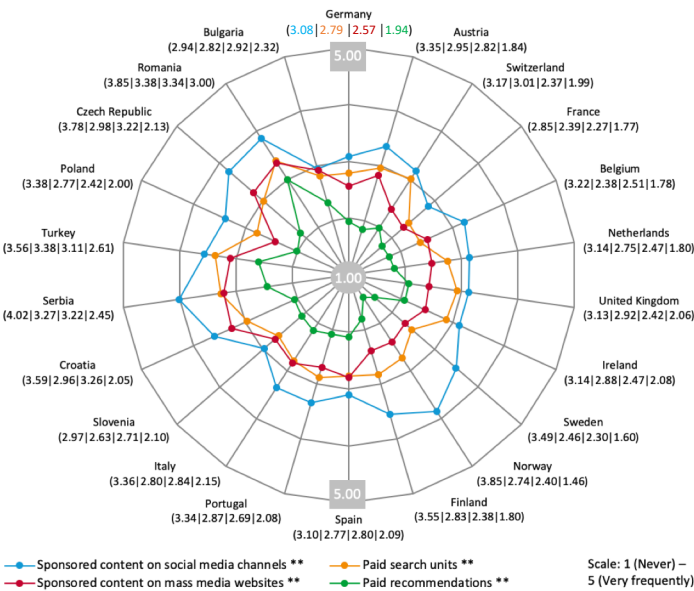## Artificial Intelligence in communications

Three quarters of the respondents (77%) think that AI will **change the communications profession** as a whole. At the same time every third believes that the way their **department or agency** works (33%) or their **individual job** (37%) will rarely be impacted – a somehow contradictory result. This might be triggered by the fact that only 15% of the practitioners could be identified as **AI experts.** A total of 56% state that it is difficult to secure **competencies of communication practitioners** needed for introducing AI, followed by 54% who believe that **information technology, budgets or organisational structure** are important hurdles. Practitioners in various types of organisations have different views on this: non-profits rate organisational challenges for implementing AI higher, while motivation of practitioners is a stronger concern in agencies. Overall **struggling with varied staff competencies** is identified as the major risk of bringing AI to communications.

How paid online communication is used in different European countries

Germany (3.08|2.79|2.57|1.94)
Bulgaria (2.94|2.82|2.92|2.32)
Romania (3.85|3.38|3.34|3.00)
Czech Republic (3.78|2.98|3.22|2.13)
Poland (3.38|2.77|2.42|2.00)
Turkey (3.56|3.38|3.11|2.61)
Serbia (4.02|3.27|3.22|2.45)
Croatia (3.59|2.96|3.26|2.05)
Slovenia (2.97|2.63|2.71|2.10)
Italy (3.36|2.80|2.84|2.15)
Portugal (3.34|2.87|2.69|2.08)
Spain (3.10|2.77|2.80|2.09)
Finland (3.55|2.83|2.38|1.80)
Norway (3.85|2.74|2.40|1.46)
Sweden (3.49|2.46|2.30|1.60)
Ireland (3.14|2.88|2.47|2.08)
United Kingdom (3.13|2.92|2.42|2.06)
Netherlands (3.14|2.75|2.47|1.80)
Belgium (3.22|2.38|2.51|1.78)
France (2.85|2.39|2.27|1.77)
Switzerland (3.17|3.01|2.37|1.99)
Austria (3.35|2.95|2.82|1.84)

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

- Sponsored content on social media channels **
- Sponsored content on mass media websites **
- Paid search units **
- Paid recommendations **

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Content creation and distribution

57% of the practitioners confirm the rising importance of **earned media** during the last three years. 54% have experienced the same for **owned media** and 77% for content published on social media platforms by supporters of any kind (**shared media**). There are differing views about **paid media**: 38% of the practitioners think this approach has gained in importance, while 36% believe its value has reduced and 26% see no changes. Sponsored social media content is used by every second communication department and agency (53%).

Excellent communication departments, which have been identified in the study based on the Comparative Excellence Framework developed by the ECM researchers, utilise all kind of external and internal sources more intensively when creating content, and they use paid communication more often for addressing stakeholders on the web.

"In light of declining trust in mass media, the study reveals a striking trust gap in the communications profession as well. Practitioners have to make sure that top management and stakeholders alike know what they do."

Professor Dr. Ansgar Zerfass, Leipzig University
Lead researcher, European Communication Monitor

"Our results deliver crucial insights for all communication practitioners who will have to tackle technologies like AI now or in the near future."

Hans Koeleman, Chief Corporate Communications & CSR Officer, KPN
President, European Association of Communication Directors (EACD)

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