

EUROPEAN COMMUNICATION MONITOR 2023

**LOOKING BACK AND AHEAD:
15 YEARS OF RESEARCH ON STRATEGIC COMMUNICATION.**

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Contact:

Please contact the authors listed on page 61 or lead researcher Professor Dr. Ansgar Zerfass at zerfass@uni-leipzig.de, if you are interested in presentations, workshops, interviews, or further analyses of the insights presented here.

Ansgar Zerfass, Ralph Tench,
Dejan Verčič, Ángeles Moreno,
Alexander Buhmann & Jens Hagelstein

EUROPEAN COMMUNICATION MONITOR 2023

Dynamic developments in the fields of media, technology and public opinion building have transformed societies across Europe since the beginning of the 21st century. This has also changed the way companies, non-profits, governmental organisations, and agencies working on their behalf communicate with internal and external stakeholders. Professionals working in the field called strategic communication, corporate and organisational communication, public relations, or communication management face many challenges and see even more opportunities to leverage their expertise.

This report provides an overview on the field's changing status and on emerging or disappearing trends over more than 15 years. It presents and interprets data from almost 40,000 respondents in 50 countries collected in the European Communication Monitor surveys between 2007 (when Twitter took off) and 2022 (when ChatGPT entered the scene). A look back at the most important strategic issues over the years is combined with a look ahead to identify five areas of action for communication leaders and develops 15 theses based on summarising longitudinal empirical insights and current research literature.

INTRODUCTION & OVERVIEW

15 YEARS OF RESEARCH ON STRATEGIC COMMUNICATION: LOOKING BACK AND AHEAD.

The practice of organisations to use communication to inform, convince, persuade, or engage others (Zerfass & Link, 2022) is not new at all. But it has become increasingly important since the beginning of the 21st century due to the growing mediatisation of our societies – a mega trend in which businesses, governments, non-profit organisations and other entities adapt their strategies and how they present them to the media logic (Couldry & Hepp, 2013; Hjarvard, 2013). This has been further reinforced by the proliferation of social media (Hepp, 2020) and digital technologies that enable everybody to create content, share messages, comment, and connect around the clock. No one could have envisioned chief executive officers, consumers, employees, and activists alike using self-presentation techniques and storytelling when professional communication emerged a century ago in the form of advertising, press relations, publicity, and propaganda.

However, strategic communication in the sense of engaging in conversations that are substantial for survival and sustained success (Zerfass et al., 2018) is no walk in the park. Planning and executing communication activities with internal and external stakeholders requires a broad set of competencies, resources, structures, and processes. This is the domain of communication departments and external service providers, mainly communication agencies or consultancies. The profession counts hundreds of thousands of practitioners in Europe – there are no reliable statistics, as different terms such as communication management, corporate communications, corporate affairs, organisational communication, public relations, or simply communications are used to denominate this converging field (Nothhaft & Zerfass, 2023).

Profound empirical knowledge about the field in Europe is rare. Many concepts discussed in research and practice have been deve-

loped in other regions, especially in the United States, without taking into account the cultural, economic, and political diversity on the Old Continent. Also, new trends are often propagated by industry studies that are hardly suitable as a basis for strategic decisions as they do not meet minimum standards of applied research.

The *European Communication Monitor* (ECM) has closed this gap. It started as a small initiative of five professors in 2007 and grew into the largest collaborative research project in the field with 28 leading universities and several partners from practice involved today. It is the largest and longest running transnational study on strategic communication and communication management worldwide with almost 40,000 participating communication professionals from 50 countries overall (see pp. 57–59 for key facts and the methodology). Parallel surveys in North America, Latin America and Asia Pacific were initiated and coordinated as the *Global Communication Monitor* series by lead researcher Ansgar Zerfass.

This report combines a look back at the most important strategic issues for communication management over 15 consecutive years (pp. 7–8) with a look ahead that identifies five key areas of action for communication leaders by summarising longitudinal empirical insights from the ECM and current research literature. The authors provide 15 theses to stimulate reflection and debate (pp. 9–49). More insights can be found in the literature referenced throughout the text and in the annual ECM reports, which are available online (see p. 50).

A unique feature of the ECM series is the identification of high-performing communication departments and their attributes. To this end, the *Comparative Excellence Framework for Communication Management* inspired by business excellence models has been developed in 2014 and was applied ever since (Tench et al., 2017; Verčič & Zerfass, 2016). Excellence drivers for most of the topics addressed in this publication can be found in the annual ECM reports. The reports inform also about differences between regions and countries, types of organisations (companies, non-profits, etc.), and respondents based on their hierarchy, age or gender.

LOOKING BACK: THE MOST IMPORTANT STRATEGIC ISSUES FOR COMMUNICATION MANAGEMENT IN EUROPE FROM 2007 TO 2022

Building and maintaining trust

- Continuously rated as important by communication managers in Europe since 2007
- Peaking as the most relevant issue each year since 2018

Linking business strategy and communication

- #1 strategic issue in the first ten years of the European Communication Monitor
- Sudden drop in 2019 as operational issues became more important, but now on the rise again

Dealing with sustainable development and social responsibility

- Prioritised by less than one-fifth of practitioners between 2013 and 2018
- On a steady rise again since then and among the top three since 2020

Dealing with the speed and volume of information flow

- Always on the agenda since 2014 with a rather volatile history
- Reflects the ongoing challenge to keep up with new technologies

Using big data and/or algorithms for communication

- Already identified as an important strategic issue in 2016
- Since then constantly assessed as highly relevant by every fourth communicator in Europe

WHAT KEEPS COMMUNICATORS AWAKE AT NIGHT

Communication practitioners working in in-house departments or agencies have to keep track of rapid changes in the societal, economic and technological environment. Their daily work (topics covered, tasks, outputs) as well as their overall standing is often influenced by macro developments like the global financial crisis in 2007/08 or the COVID-19 pandemic from 2020 to 2022 (Meng & Tench, 2022). Apart from that, challenges and opportunities resulting from shifts in public perceptions and the media system have a huge impact: declining trust in all institutions all over Europe (Ahrendt et al., 2022) and the advent of new multipliers, e.g., social media influencers (Enke & Borchers, 2019) or technologies for automated content production (Smith & Waddington, 2023) are just some examples. Navigating through this changing world requires a sound understanding and prioritisation of key issues that offer challenges and opportunities for managing communications.

The European Communication Monitor has researched many of those topics in detail over the last 15 years (ECM 2007–ECM 2022). It has also tracked the rise and decline of key issues rated as important by communicators over time (see box and ECM 2022, pp. 72–76, for the latest data). These unique longitudinal insights reveal how communicators across Europe started to pay attention to new developments, how they deprioritised issues after some time (probably due to a better understanding and the development of practices to deal with them), and how some issues took off again or kept their status as a key strategic issue.

TRUST AND STRATEGIC ALIGNMENT

The look back (see p. 7) shows that two issues have been constantly on top of the mind of the surveyed communicators – most of them heads of communication or agency CEOs – and they will continue to stay there at least until 2025: building and maintaining trust and linking business strategy and communication. The trust placed in organisations by their stakeholders is a valuable immateri-

al resource, often based on communication activities (Röttger, 2018). It is not surprising that communicators rate building and maintaining trust as important – but the fact that they continuously prioritise it over multiple other values created by communications (Zerfass & Viertmann, 2017) confirms that trust is essential for excellent organisations (Tench et al., 2017). Aligning communication management with overarching organisational goals is another perennial issue (Volk & Zerfass, 2018). Research on measurement and evaluation of communication (Buhmann & Volk, 2022) provides many solutions today that have probably not yet arrived in practice.

SHIFTING EXPECTATIONS AND DIGITALISATION

Stakeholder expectations regarding sustainability and social responsibility have been a main concern for communicators in Europe. However, they have become less important between 2008 and 2022 and are now again among the top three strategic issues. A similar volatility, but on a higher level, applies to the assessment of challenges and opportunities related to the intensified speed and volume of information flow in a digitalised and globalised world. Last but not least, it is interesting to note that algorithmic communication has already been identified as a key strategic issue by every fourth ECM respondent in 2016 – six years before ChatGPT took off.

► HOW WE MEASURED STRATEGIC ISSUES

In each iteration of the ECM survey, several thousand communication practitioners from all over Europe were asked: “Which issues will be most important for communication management within the next three years from your point of view?” They were then requested to select exactly three items from a list of issues. Frequencies mentioned here are based on the selection of the respective item as a top-3 issue. To keep track of new developments, the two items selected least often in the last round were deleted from the list and replaced by two new issues each year.

LOOKING AHEAD: KEY INSIGHT AND DRIVERS OF SUCCESS FOR THE NEXT DECADE

1 Leverage the potential of advanced tech and data use

PAGE 10

2 Develop rare competencies and new roles for professionals

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3 Reach and impact audiences in a hyperconnected world

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4 Lead and motivate extraordinary teams

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5 Build relationships in times of misinformation and distrust

PAGE 42

1

**LEVERAGE THE
POTENTIAL OF
ADVANCED TECH
AND DATA USE**

Digitalisation is both a trigger and the backbone for the rapid transformation of communication departments and consultancies or agencies. This transformation goes well beyond new channels and forms of stakeholder communication. It has a fundamental impact on the structures and workflows of communication management and the communication profession as a whole – it is truly a ‘digital revolution’.

BEYOND A NARROW VIEW OF DIGITALISATION

Digital tools, networks and services have not only introduced new media and platforms to organisational communication. They have the potential to change the entire management process from monitoring to evaluating the stakeholder journey across all communicative touchpoints with an organisation or brand (Luoma-aho & Badham, 2023). Researchers have introduced the term CommTech to grasp this development (see the box and Brockhaus et al., 2023; Zerfass & Brockhaus, 2021, 2023). A broad majority of communication practitioners in Europe confirms the relevance of such a holistic perspective: it is equally important to digitalise communication processes and infrastructures (Figure 1).

A fully developed digital infrastructure includes several layers of technology. Core functional infrastructure, e.g., content management tools and databases for thematic dossiers, helps communication practitioners to perform primary activities like reaching out to stakeholders and advising (internal) clients. This is directly linked to the value creation through communications. Supportive functional infrastructure like tools for media monitoring and digital asset management helps to manage and execute support activities specifically used for communications. Both layers define the CommTech domain; it is here where communication units can gain a competitive advantage. A third layer comprises generic digital infrastructure that supports workflows in communication just like in any other organisational subunit, e.g., cloud services or video conferencing systems (OrgTech) (Brockhaus et al., 2023).

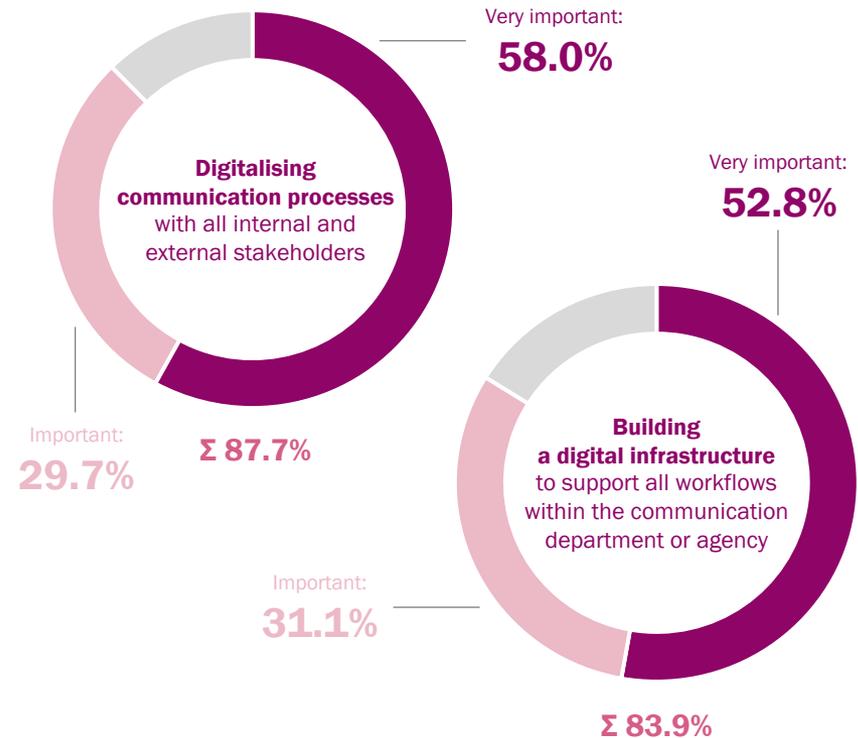


FIGURE 1. Two important dimensions of digitalisation (ECM 2021).

► WHAT IS COMMTECH?

“CommTech are digital technologies provided or used by communications functions or departments to manage and perform primary activities, particularly stakeholder communications and internal advising, or functional support activities such as managing internal workflows for monitoring, content planning, or evaluation.” (Zerfass & Brockhaus, 2023, p. 243).

DATA IS AT THE CORE OF EVERYTHING

The digital transformation of communication processes and infrastructures is founded on data, often referred to as ‘gold’ or ‘oil’ of our information society. It is especially powerful in the form of big data that is defined by “three V’s” due to its volume (large amount), variety (diverse forms), and velocity (constantly processed) (Wiesenberg et al., 2017). Software algorithms, often based on artificial intelligence, can use this data to analyze and predict behaviour and to take informed decisions (Buhmann & Gregory, 2023).

In the realm of communication management, big data and algorithms have been applied to generate and distribute content specified to users, situations, or devices. For example, social media platforms and search engines offer content and advertising banners based on previous browsing patterns of recipients. This provides the foundation for targeted communication strategies.

Survey results from the ECM 2016 prove the correlation between the availability of big data and the use of algorithms for communication management (Figure 2). Hence, communicators need to establish processes and routines for collecting, buying, and analysing stakeholder data (Halff & Gregory, 2023) if they want to unlock the full potential of digital communication.

Although these practices become more and more common as they clearly are effective from an organisations’ point of view, they have raised ethical concerns among communication practitioners (Hagelstein et al., 2021). Moreover, the ECM has identified gaps between communication professionals of different age groups, cultural backgrounds, and organisational embedding when it comes to the knowledge and adoption of big data and artificial intelligence (ECM 2016, 2019). This highlights the fact that the digital transformation does not only concern technological aspects, but also people and structures.

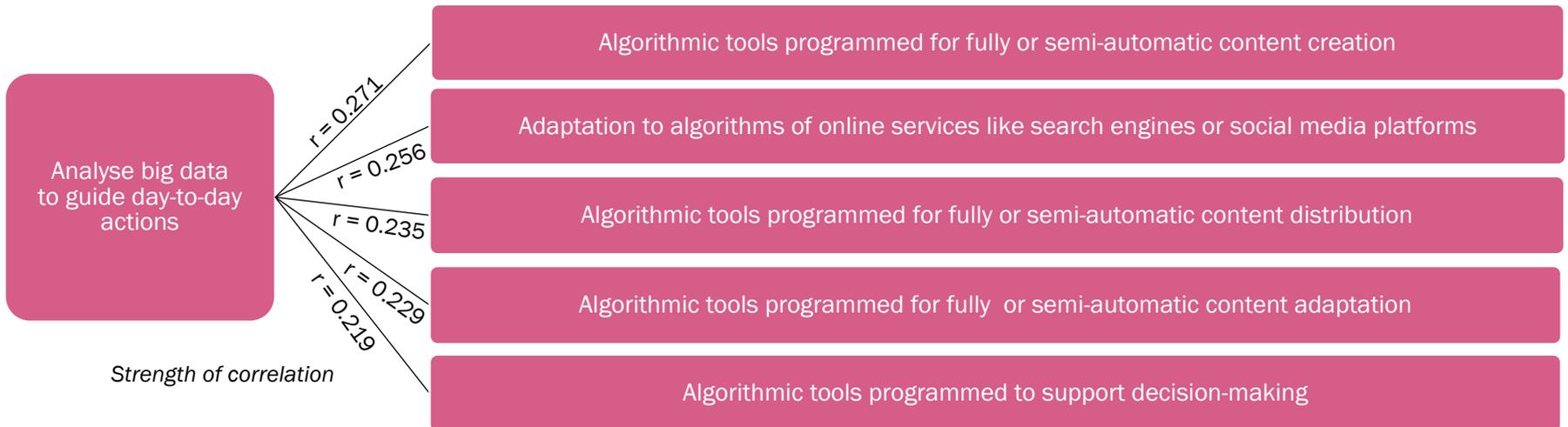


FIGURE 2. The use of big data and algorithmic tools are closely intertwined (ECM 2016).

LEADING THE TRANSFORMATION

Research in the domains of information systems and information technology has uncovered different dimensions of technological transformation processes. The socio-technical systems approach (STS approach; Bostrom & Heinen, 1977) divides any work system – like the communication department in an organisation – into two subsystems: a technical subsystem shaped by available technologies and established tasks, and a social subsystem mainly defined by structures and people. All components influence each other and shape the output of the work system as a whole (Brockhaus et al., 2023).

Remarkably, the most striking hurdles in adopting CommTech are not on the levels of technology (e.g., software performance) or

people (e.g., lack of digital competencies among communicators) (ECM 2022). Instead, the main challenges reported by communication practitioners across Europe are communication tasks and processes which are not prepared for digitalisation as well as inflexible organisational set-ups and cultures, missing support from IT departments, and similar structural barriers (Figure 3).

Unfortunately, most communication units lack dedicated strategies for transforming structures (prevalent in only 42.1% of all cases) or people (41.9%) and especially for modifying tasks (39.4%) (ECM 2021). Communication departments in joint stock companies are slightly more advanced, while those in governmental organisations and non-profits lag behind. Generally, these areas deserve more attention, as regression modelling of the data proves that developing strategies helps to boost digital maturity.

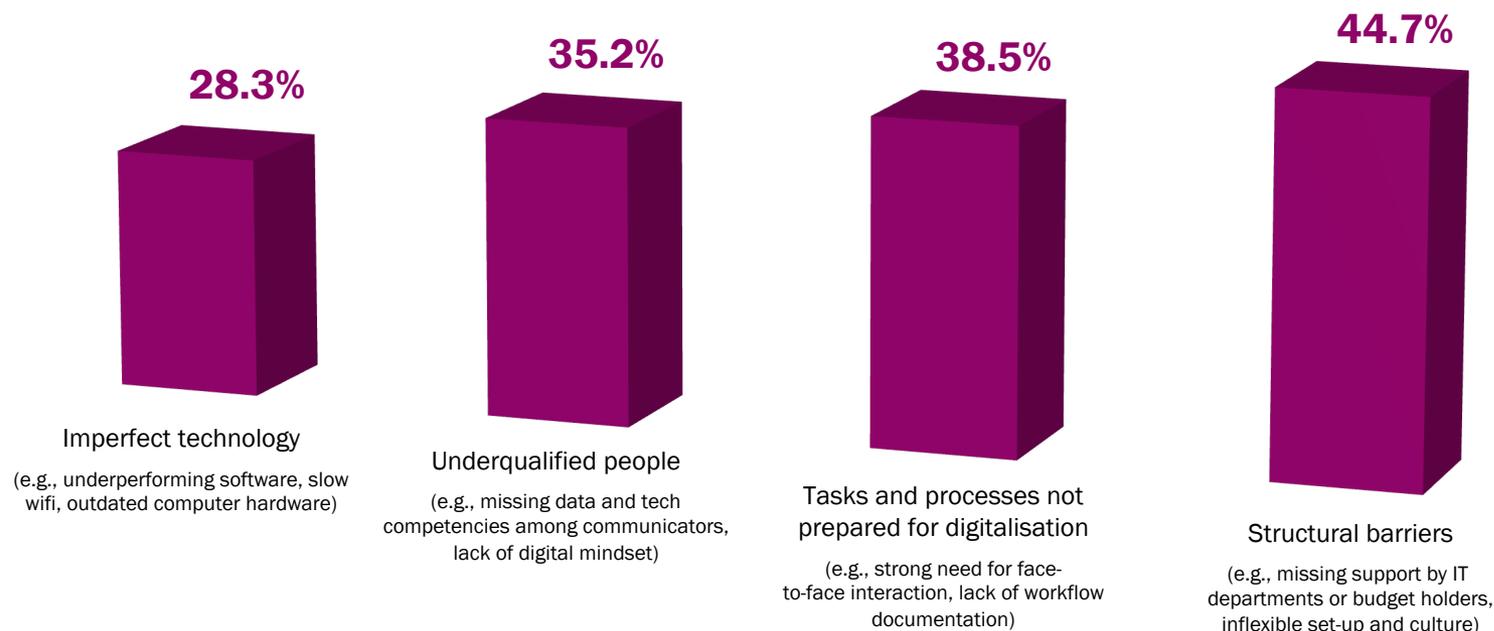


FIGURE 3. Barriers for implementing CommTech (ECM 2022).

PEOPLE AND VALUES MATTER

Recent developments in the area of artificial intelligence and applications like ChatGPT, Midjourney, or Synthesia illustrate the fundamental change of communication practices through digital technologies. Artificial intelligence (AI), defined as software-driven agents capable of flexible decision-making processes and actions (Zerfass et al., 2020), may take over routine tasks like content creation or adaptation, allowing communication practitioners to spend their work time on creative and strategic tasks. However, the ECM has identified several challenges on both the individual and societal level for implementing AI in communications (Figure 4).

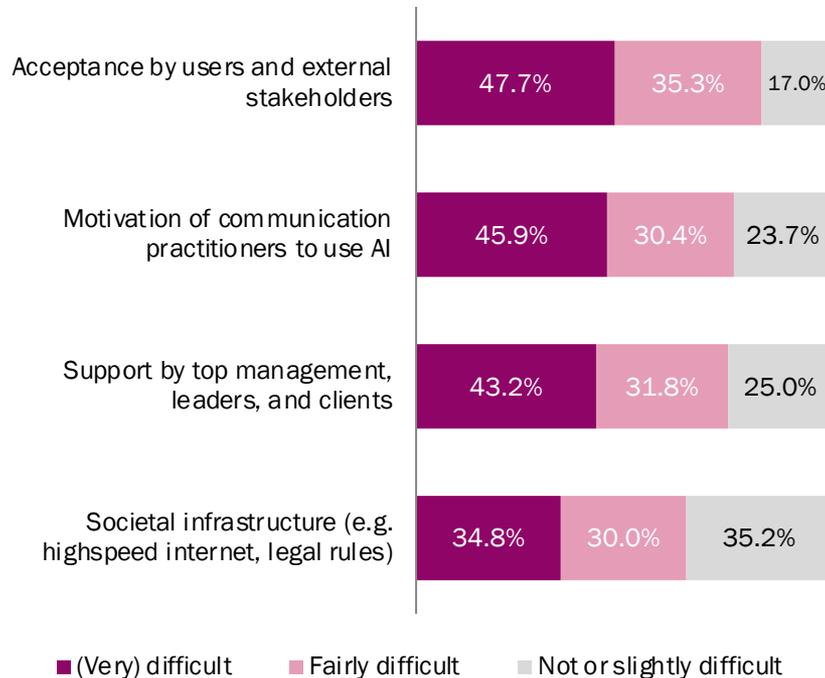


FIGURE 4. Individual and societal challenges for implementing artificial intelligence in communication management (ECM 2019).

“Never before have communication leaders faced such great opportunities and risks at the same time. CommTech, big data, and services based on artificial intelligence can enhance the efficiency and effectiveness of organisational communication, but they also threaten current business models of communication departments and agencies. Concise transformation strategies adapted to the situation and courageous leadership are necessary to move forward.”



PROF. DR. ANSGAR ZERFASS, RESEARCH TEAM

In addition to these general challenges, there is another obstacle rooted in the profession itself: the ‘AI divide’ between different generations of communicators (ECM 2019). Contrary to the ‘digital divide’, younger communication practitioners fear more risks linked to AI (e.g., job losses) than their older colleagues. Others could be overwhelmed by the plethora of new digital tools, especially software and services, that promise to ease their work with the help of artificial intelligence. Under these circumstances, communication leaders need to address reservations and concerns against new technologies among their staff to ensure that no one is left behind in the rapid technology-driven transformations. They also need to secure support of top management and of internal and external stakeholders and identify ‘project champions’ within digital change processes (Zerfass et al., 2020).

CYBER SECURITY REQUIRES HIGHEST ATTENTION

The availability of generic digital infrastructure for remote work, virtual team collaboration, and video-conferencing with stakeholders has brought along new forms of agile practices in most organisations. Working at home and using personal devices for job tasks are convenient for employees. These decentralised work environments, however, have increased the possibility of cyber attacks. Consequently, we can observe a rising number of phishing emails and malware circulating around the web. Cyber criminals may also use AI technologies in the fields of synthetic media to develop deep fakes (Stieglitz et al., 2022). Both threats pose serious risks to organisational reputation and the functioning of communication departments or agencies. The ECM shows that European practitioners fear above all that cyber criminals could hack their websites and social media accounts, or close down the digital infrastructure for communications. They are also concerned about the risks of stolen stakeholder data and leaked internal information, for example communication strategies (Figure 5).

It is obvious that strong cyber security measures are crucial for any communication department or agency. Cyber security embraces all guidelines, training, and technology that organisations take to prevent attacks on their computer systems, networks, and services in the form of information leaks, theft, and damage (Schatz et al., 2017; Stieglitz et al., 2022). The ECM 2020 revealed that 45.5% of all surveyed communication professionals are often involved in tackling cyber security crises. Another 31.1% address cyber security issues regularly in their internal communications. But communicators are seldom involved in educating their co-workers on cyber security or in developing cyber security guidelines themselves.

These findings call for a stronger prioritisation of cyber security in the profession. Communicators should not wait until they become a victim themselves, but develop safety measures, back-up plans, and crisis communication strategies beforehand.

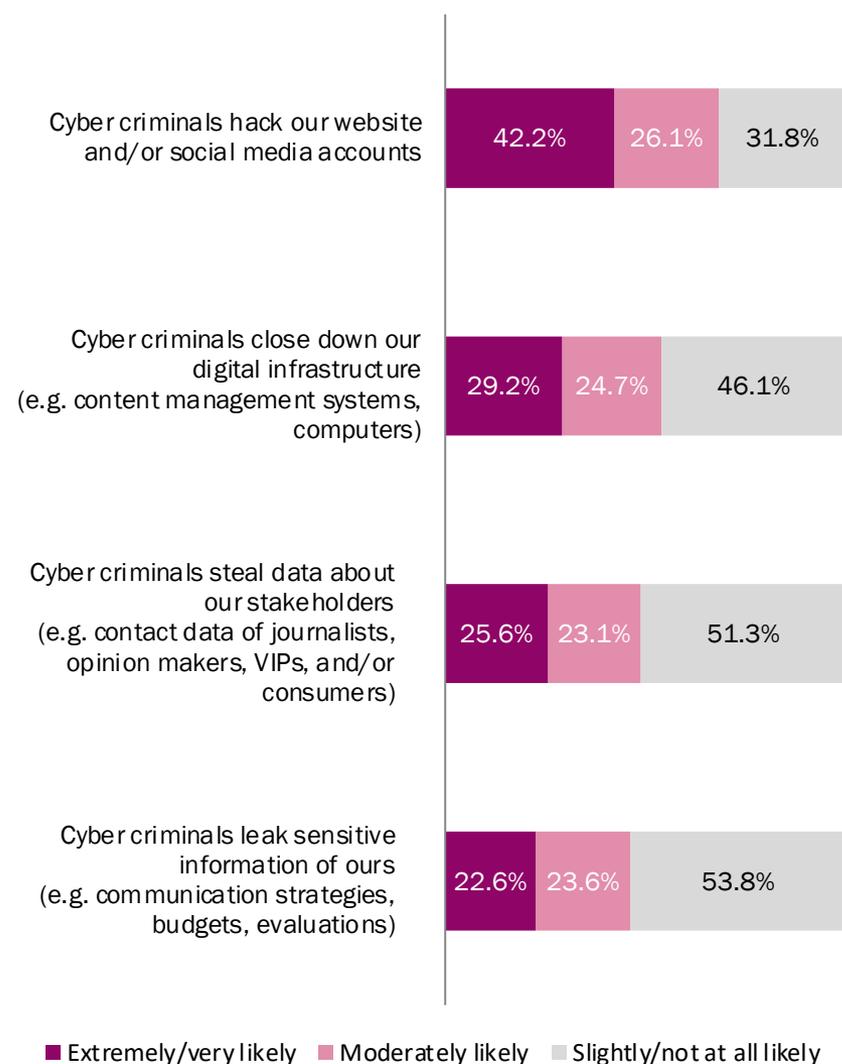


FIGURE 5. Communication departments and agencies can be affected by different types of cyber attacks (ECM 2020).

ON THE WAY TO DIGITAL MATURITY

Tech and data enable communication practitioners to manage and execute strategic communication in an advanced way. The advent of AI-driven applications such as ChatGPT has sparked a lively debate in the profession (Smith & Waddington, 2023). However, it is apparent that many hope that their daily work will not be affected (ECM 2022). Such a third-party effect, i.e., that people believe that something publicly discussed has a greater effect on others than on themselves (Davison, 1983) has been evidenced in the ECM studies for several developments over the years.

It seems that communicators are good in talking about societal, economic, and technological changes on behalf of their organisations – but they find it hard to reflect on the consequences for their own profession and act accordingly. The impact of CommTech on communication management is assessed quite differently across

countries, with no clear regional trend. The reluctance at the individual level of communicators corresponds with a moderate level of digitalisation at the meso level of communication departments and agencies. According to the ECM 2022, only very few (6.2%) of these units have digitalised all their core activities and established a very advanced use of CommTech. Apart from these innovators, many lag behind and are classified as outsiders, late-comers or a late majority by practitioners working there.

The digitalisation of organisational communication is an ongoing journey (Zerfass & Brockhaus, 2023). It has started in the 1990s when new media channels were introduced and online communication gained momentum. It has been enhanced by the use of technology for data-driven communication, such as personalised campaigns. And it has just begun to fundamentally change the infrastructure and daily tasks in communication departments and agencies. Digital maturity is a moving target that is difficult to reach.

3 THESES ON HOW TO MAKE THE DIFFERENCE WITH ADVANCED TECH AND DATA USE

1. Digital technologies, artificial intelligence and big data change everything. Key to communicators' success is using technology beyond automated messaging for internal advising and improved workflows.

2. Vigorously implemented digitalisation strategies increase the digital maturity of communication units – they should focus on redesigning tasks and processes as well as breaking down structural barriers.

3. Cyber security is essential: protecting organisational communication infrastructure, implementing analogue back-up routines and preparing for crises triggered by cyberattacks are indispensable.

2

**DEVELOP RARE
COMPETENCIES
AND NEW ROLES
FOR PROFESSIONALS**

Managing and executing strategic communication in a global and mediatised world is a complex task. To enable practitioners to achieve strategic goals, their skills, knowledge and personal attributes need to be developed into broader competencies that can then act as drivers of success for communication departments and organisations as a whole. Aspects of communications are changing quickly, such as the move towards engagement across multiple media platforms, use and management of large data sets and the inevitable rise of generative artificial intelligence (AI). As such, there are some competency gaps which need to be considered and addressed to enable practitioners to keep up with and ensure their communications are effective.

A RAPIDLY CHANGING LANDSCAPE

Some areas of strategic communication such as alignment with organisational goals (Volk & Zerfass, 2018) have changed gradually over recent years, providing time for practitioners to adapt. However, other areas have changed more quickly, such as the move towards engagement across multiple media platforms, which has resulted in some competency gaps. There are also new challenges arising for the field, which practitioners need to be able to deal with. Such challenges include the need to tackle fake news and disinformation (Wiesenberg & Tench, 2020), the move towards digital (Luoma-aho & Badham, 2023), the use of big data for communications (Wiesenberg et al., 2017), and the rise of new media platforms and formats (Tench & Waddington, 2021). Adding to this is the rapid development of hyper intelligent and self-evolutionary generative AI such as ChatGPT (Smith & Waddington, 2023). Discussions are inevitably emerging on the effect this technology will have on the world of work and society more generally, including the impact on business (Zarifhonarvar, 2023) and on journalism and media roles (Pavlik, 2023).

Recent evidence suggests that key areas to focus on will be cognitive analytics, data management, technology literacy, and sense-making skills for digital transformation and digital competencies (Lee & Meng, 2021). These chime well with the evolving themes that the ECM studies have identified over 15 years. Whilst the digital transformation has the potential to bring significant business opportunities, particularly in terms of greater efficiency, improved productivity and reliability, there are also several challenges. Organisations will need to keep pace with these developments and those working within organisations will need to have the required skills to deal with the transformative potential of digitalisation and AI.

“Competencies are the underlying foundational abilities that are integral to successfully carrying out the tasks and responsibilities, and thus remain a stable blueprint for practice over time.”

JEFFREY & BRUNTON, 2011

A recent systematic review indicates that for businesses to survive the shift, a range of digital strategies will need to be implemented (Rêgo et al., 2021). Previous research stated that the lack of individual competencies relevant to the digitalisation of communications, and the challenge of managing staff with different levels of competency are key challenges and risks (ECM 2020; Wiesenberg et al., 2017; Wiesenberg & Moreno, 2020). As such, due to the emergence of technology, datafication and AI across organisational functions including communications, it is important to understand the level of knowledge and skills that exist amongst professionals and what can be done to ensure professionals are prepared for the continued move towards a greater reliance on communication technology (CommTech), big data, and AI in modern work environments.

WHAT DOES 'GOOD' LOOK LIKE IN COMMS?

Not all those engaging in internal and external communication with stakeholders hold communication specific qualifications and as such vary in their competency and experience levels. It has been argued that those who have not received a formal education or even accreditation (which is available in a few countries) have higher levels of management and planning experience than their peers. Data from the first ten years of the European Communication Monitor helped to identify characteristics of professional communicators in Europe. The *Communication Excellence* book (Tench et al.,

2017) outlined three dimensions of professionalisation in communication management (Figure 6). The Comparative Excellence Framework for Communication Management (see p. 6) developed by the ECM research team over the years has been used in that book to identify drivers for high performance communication on three levels: the organisation, the department, and the individual. Each of these levels embrace three commandments.

Competencies are discussed on the third, individual level where practitioners must be knowledgeable and sagacious, professionally well connected or linked and working within a high moral and ethical framework to be solid.



FIGURE 6. The three dimensions of professionalisation (adopted from Tench et al., 2017).

IDENTIFYING THE CORE COMPETENCIES OF COMMUNICATORS

Findings from an EU funded research project linked to the ECM, the European Communication Professional Skills and Innovation Programme (ECOPSI) show how skills, knowledge and personal attributes combine to form competencies for professional communication (Tench et al., 2013; Tench & Moreno, 2015). Following the competence line of thinking about qualifications and interpreting the ECM data, Tench et al. (2017) identified the most important qualifications for communication management based on ECM data. Four groups emerged (see box).

The skills, knowledge and personal attributes that communicators have lead to broader competencies which act as drivers of success for communication departments (Tench & Moreno, 2015). These competencies are both specific to communications such as data handling and some are relevant to organisational success more generally, such as management skills (Topić & Tench, 2018).

Communication and management competencies are rated as the most important skills needed to be an effective communicator, as supported by over 85% of practitioners. Seven out of ten believe that business, technology, and data competencies are necessary to perform well.

While traditional communication and management competencies are rather well developed, large gaps exist in other areas. Every third communicator (32.2%) in Europe is underskilled and almost every fifth (18.4%) is critically underskilled in data competencies, which includes developing about use cases, applying methods, and interpreting results for data retrieval in communication departments and agencies. Moreover, overall 44.4% of the practitioners can be classified as underskilled in technology competencies, e.g., using software or hardware and digital savvyiness.

► FOUR QUALIFICATIONS FOR COMMUNICATORS

1. Social and empathic antenna. The skill of coaching others in their communication or enabling others to communicate. It is also about handling power and coalition building between people inside and outside the organisation. This can mean initiating and moderating dialogues with a cross-cultural and cross-gender sensitivity, but also handling ethical issues and knowing about ethics and with managing projects globally.

2. Producing and delivering effective messages. There is a need for knowledge about the effects of traditional, social, and emerging media, about persuasion concepts and strategies, but also about how to manage relationships inside and outside the organisation. The actual message production and delivering and presenting messages as a public speaker also characterise this area of qualification.

3. Research skills and organisational management skills. A practical understanding about software, services and research methods to be able to measure and evaluate communication activities or generate data-based forecasts. The ability to interpret data for insights about stakeholders or other organisations is another part of this qualification. Management skills are needed to handle organisational change and development, as well as finances, budgeting and accounting for communication departments or agencies.

4. Knowledge about society. This includes a depth understanding about the way societies and politics work and how this is translated into public expectations, regulation, and issues affecting the organisation for good or bad. Knowledge about the functioning of organisations in democratic societies, stakeholder negotiations, and the rule of law are considered important here.

ROLE ENACTMENT OF COMMUNICATORS

Communication practitioners face a wide variety of tasks, ranging from creating and distribution content to aligning communication strategies, managing teams or departments, coaching CEOs or employees in professional communication, or advising executives in decision-making processes. Building on existing concepts, recent research has suggested a new systematisation of these different roles (Volk et al., 2017). Following this approach, the ECM 2021

distinguished five roles that practitioners may perform to varying degrees during their worktime: the Communicator, Ambassador, Manager, Coach, and Advisor (Figure 7). The Communicator and Ambassador roles are traditional 'outbound' roles focusing on communicating with stakeholders, while the Coach and Advisor roles are 'inbound' roles focusing on supporting executives, middle managers or other members of the organisation. The Manager role includes dispositive tasks relevant for operating the communication department or agency itself.

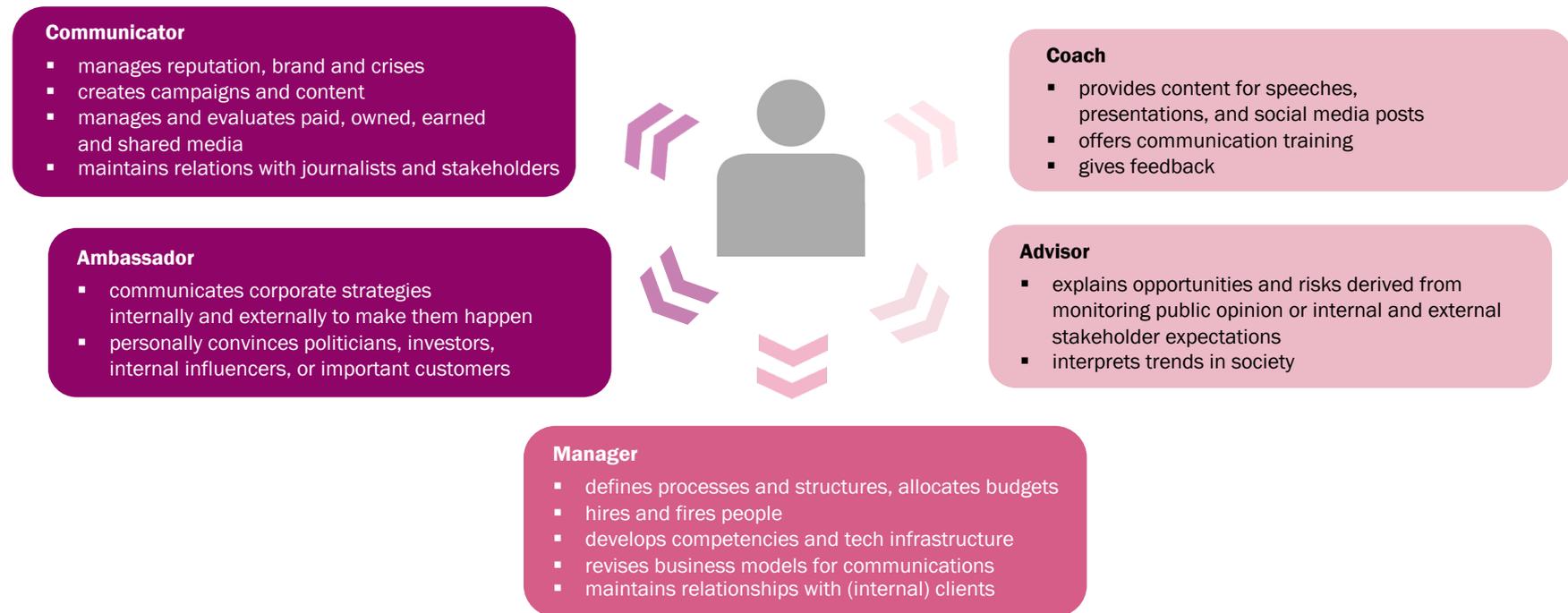


FIGURE 7. Communication practitioner roles (ECM 2021).

When it comes to the competencies and personal attributes relevant to the various roles, it is not surprising that a majority consider themselves well equipped to communicate on behalf of their organisations, but only one in two consider their management competencies to be high (Figure 8).

Competencies for acting as ...

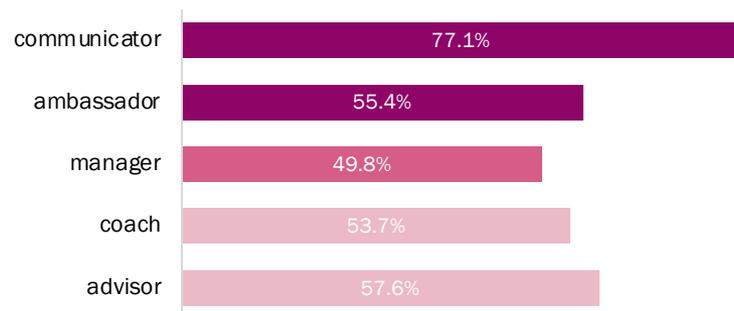


FIGURE 8. Communicators lack management skills (ECM 2021).

CLOSING COMPETENCY GAPS

Results from the ECM 2020 highlight the importance of competencies to practitioners. Almost half of respondents (43.3%) agree that competencies are intensively discussed in their country, and most (80.9%) believe in the need for constant improvement (Figure 9). There are differences between experienced and younger professionals in terms of perceived importance of developing competencies. Experienced practitioners are more aware of the need for competency development, with less than one quarter of practitioners in their 20s reporting only little or moderate need for such development (ECM 2020).

A similar difference in the awareness of the importance of competency development was also reported regionally, with the awareness of the need for development strongest in Western and

“These are difficult times. Holding responsibility for managing and delivering strategic communication in our global and mediatised world is challenging. Communication professionals need to ensure they develop the skills to deal with changes to their work and evolving operational environments. The ECM outlines roadmaps for developing the next generation of communicators to be high performing and equipped to meet future business, environmental and social demands.”



PROF. DR. RALPH TENCH, RESEARCH TEAM

Northern Europe. Such differences may in turn lead to variations in what competencies are held, and thus could account for some of the differences in the success of communication efforts, i.e., achievement of desired goals, between organisations across Europe.

80.9%

“There is a great need for communication practitioners to develop their competencies.”

FIGURE 9. Competency development in the communications profession (ECM 2020).

PROFESSIONAL TRAINING AS A DRIVER OF SUCCESS FOR COMMUNICATORS

Many of the key competencies mentioned above are not fully developed across communication practitioners. In order to progress as a field, practitioners will require training. To close these competency gaps and enable communicators to achieve excellence, training time needs to be prioritised with a correlation between educational efforts of communication practitioners and their competency level. The prioritisation of personal development is currently not equal across organisations, with practitioners working in joint stock companies having the least time to train whilst those working in consultancies and agencies have the most time, such differences also need to be considered.

There are also discrepancies between practitioner age groups, with younger communicators (up to 29 years) investing over eight weeks of work and leisure time in further study, compared to only

two weeks for those between 40–49. In terms of who should be responsible for further competency development, most practitioners (84.4%) report that individuals should invest in their own development, but many (82.9%) plead for development programs at the organisational level (ECM 2020).

Communicators continue to face competency gaps. This affects all demographic criteria (age, gender, hierarchical position) and organisational type. High performing organisations, departments and individuals invest heavily in on-going training and development, an essential future commitment. More time and resources are necessary to address competency gaps, especially as digitally-based practice rapidly adapts and transforms. Technology – such as virtual learning (Zajac et al., 2022) – provides opportunities for training innovation. Communicators must engage and adapt for example using AI and virtual teams (Chen, 2023) as training, continuing professional development and learning platforms to address existing and future competence gaps.

3 THESES ON HOW TO ADDRESS FUTURE COMPETENCY NEEDS FOR COMMUNICATORS

1. Communication practitioners lack many of the competencies required to face the challenges and unleash the full potential of digital opportunities. More effective training for use needs to be developed.

2. New opportunities for communicators emerge from serving as advisors or consultants in their organisations – two roles that are expected to grow in importance in the coming years.

3. Increased investment in training, even for seasoned communications professionals, and new virtual formats are needed to keep communications departments and agencies at the cutting edge.

3

**REACH AND IMPACT
AUDIENCES IN A
HYPERCONNECTED
WORLD**

The world is getting smaller every day: Since the advent of the Internet, information travels instantaneously and simultaneously, and, as COVID-19 demonstrated, viruses are not much slower. Opportunities and crises transpose borders, and consequences of the environmental degradation are felt worldwide. Globalised media, analogue and digital, produce a hyperconnected world in which communication is not only connecting people and organisations, but is becoming the very environment in which we live. Reaching and impacting audiences is becoming easier and harder at the same time. Mediatisation of our lives calls for new ways to understand and manage media and relations with stakeholders.

THE RISE OF THE DIGITAL

The digital revolution has profound impacts on media. While in the 20th century mass media meant primarily print, radio and television, the 21st century is characterised by the rise of digital and virtual platforms.

Looking at trends from 2007 to 2020 identified by the ECM, we can see that social media and social networks have clearly gained in importance (from little over 10% in 2007 to nearly 90% in 2020), while using traditional mass media as intermediaries is losing in relevance. There are differences in how social media and other digital outlets are used in various countries (ECM 2017). But across Europe, social media are considered by far to be the most important channel to address stakeholders, gatekeepers and audiences (87.6%). Social media are followed by online communication via web-sites, e-mails and internets (82.1%), face-to-face communication (82.1%), spreading news via online mass media (80.0%), and mobile communication (phone/tablet apps, mobile websites) named by 75.3% (ECM 2020). An accelerated use of mobile and the decline of print media was already expected a decade ago (ECM 2014) and this has proved to be correct.

While the rise of the digital and the decline of print are clearly observable trends in the past fifteen years, Figure 10 also shows a convergence of all communication channels (Verhoeven et al., 2020). The clear hierarchy from 2007 has disappeared by 2020. All channels are important and contingent – communicators use them depending on concrete needs and opportunities. Omnichannel, the consideration of all available media at hand, is a new buzzword. A rising importance of face-to-face accompanying the advent of the digital implies that high-tech needs high-touch. Computer mediated communication (CMC) will never completely replace human-to-human (H2H); it is quite possible that digital practices increase the need for human interaction.

“We are indeed in a new communication realm, and ultimately in a new medium, whose backbone is made of computer networks, whose language is digital, and whose senders are globally distributed and globally interactive.”

CASTELLS, 2007

INTEGRATING COMMUNICATION AND CONTENT STRATEGIES

Traditionally, media content was divided between editorial and advertising. In many ways, this distinction also affected the identification and specialisation of various communication disciplines. Public relations was responsible for publicity and therefore editorial content, while marketing was responsible for advertising. Changes in both media and organisations have brought a hybridisation of media content on one side, and an amalgamation of communication practices in organisations on the other (ECM 2015; Verčič & Tkalac Verčič, 2016; Zeffass et al., 2016). From the dichotomy of

Perceived importance of communication channels for addressing stakeholders, gatekeepers and audiences

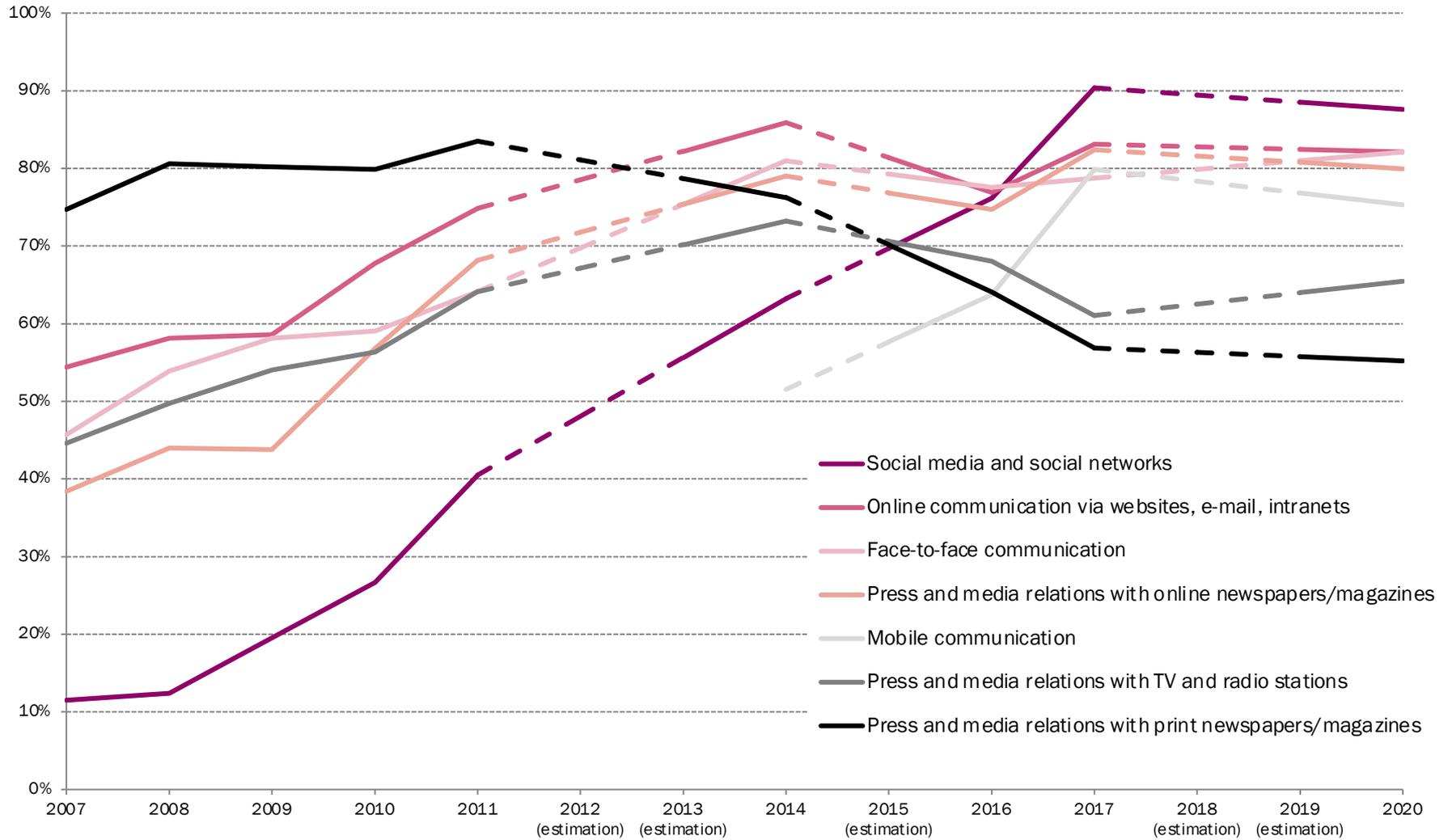


FIGURE 10. Decline of the print and rise of social media (ECM 2020).

editorial publicity and advertising, we have moved into a PESO (= paid, earned, shared and owned) media world (Dietrich, 2014; Holtzhausen et al., 2021) (Figure 11).

Paid media covers all communication that can be bought and controlled, and stretches from traditional advertising to brand journalism (producing content for corporate sponsors by media outlets) and native advertising (e.g., social media posts produced in the form of editorial content). Earned content covers all unpaid endorsements from third parties, from journalists to social media influencers. Shared media is content published on social media platforms by supporters of all kind, e.g. followers, fans, members, employees or representatives of an organisation, which can never be completely controlled. Owned media are probably the oldest mass media which started as official gazettes by political authorities

and became corporate publishing in the business environment when employee and consumer magazines were introduced. Digitalisation transformed this into a new form of corporate-owned and controlled media systems: many organisations run online communities and produce blogs, video programs, and podcasts. The fastest growing segment are shared media, followed by earned and owned media (ECM 2019).

Organisations follow the reconfiguration of the media environment with an integration of their communication practices. Public relations thought leaders advocated a clear differentiation of this function from marketing and other management disciplines in the late 20th century (Grunig, 1992). Since some years, however, we see an amalgamation of communication activities under one umbrella, strategic communication (Zerfass et al., 2018), and under

Changing importance of channels for spreading content within three years (2016–2019)

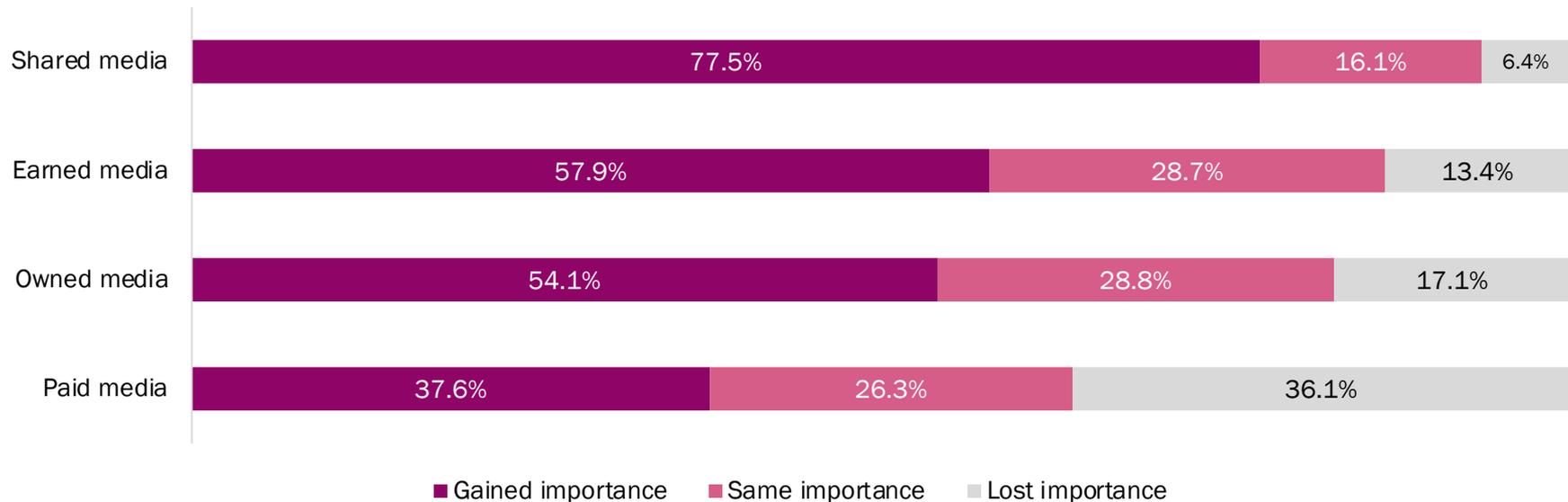


FIGURE 11. Changing importance of media (ECM 2019)

the leadership of a Chief Communication Officer (Arthur W. Page Society, 2019) (Figure 12).

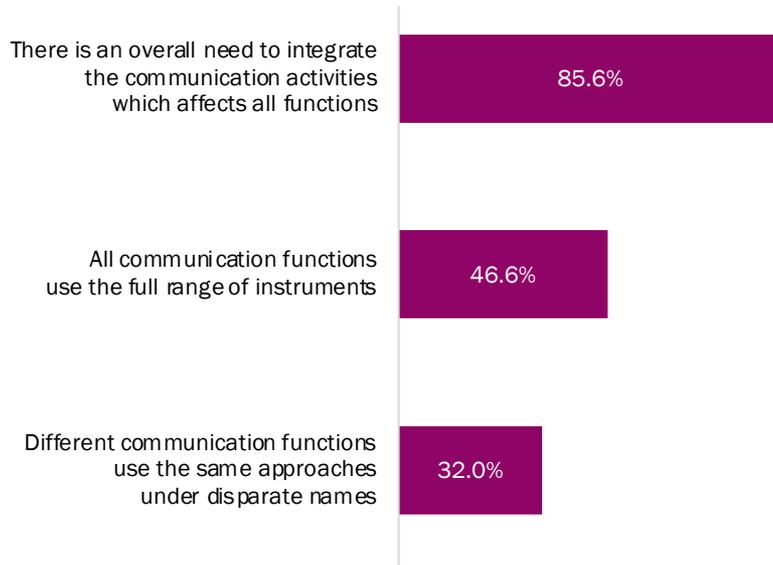


FIGURE 12. Integration of communication activities (ECM 2015).

The acceleration of digitalisation and visualisation (see below) will reinforce the amalgamation of communication disciplines (Nothhaft & Zerfass, 2023), also because the past distinctions between different stakeholders and their targeting are changing as well: borders between internal and external communications are blurring and employees are emerging as the most important media gatekeepers, a position historically occupied by journalists and editors (Tench et al., 2017). This development also generalises communication competencies, once a requirement for specialists, to something needed by all. This opens new venues for communication professionals to become coaches and trainers not only of top management, but of the whole organisation (see pp. 23–24).

STRATEGIC MEDIATISATION

Communication constitutes organisations (Schoeneborn et al., 2018) and societies (Knoblauch, 2020) alike. Communication as “the social glue that ties members, subunits, and organisations together” (Euske & Roberts, 1987, p. 42) has always been a central concept in management (Tompkins, 1997). Today’s organisations are communicative organisations (Heide et al., 2018).

One of the most striking features of communicative organisations is their mediatisation: From using mass media to reach their audiences, organisations started to mediatise themselves – they turned what used to be known as ‘corporate publishing’ into ‘owned media’ systems to directly engage with their stakeholders. While communication practitioners predict a tectonic shift from the predominance of mass media to owned media (ECM 2015), this mediatisation is not developing equally across Europe and influenced by national characteristics (ECM 2017).

The mediatisation of organisational communication has passed through three phases. Originally, mass media (print, radio and television) were used as intermediaries to reach publics and markets. Media corporations, journalists and editors were gatekeepers, deciding what is important and newsworthy. The public agenda was largely shaped by the media agenda, which gave media organisations a privileged position in society.

The internet has interfered with the traditional distribution of power by enabling organisations to directly address their stakeholders and publics with blogs, vlogs and social media. A new type of gatekeepers emerged, social media influencers (ECM 2016; Enke & Borchers, 2019). While a couple of decades ago it was extremely expensive to produce a newspaper with wide circulation or a TV programme (which for physical distribution needed also a government license), it is now possible with a smartphone and the internet to do both practically for free (Verčič & Sriramesh, 2020).

The second phase of mediatisation has not replaced, but supplemented the first one. And the emergence of the third phase in which organisations entered into all kinds of arrangements with media corporations to jointly develop and nurture new audiences must be seen as an additional element into a game of the mediatisation of everything (Tench et al., 2017; Verčič & Tkalac Verčič, 2016; Verčič & Zeffass, 2016).

► THREE FACES OF MEDIATISATION

- 1. The classical face.** Organisations use press and media relations with journalists like newspapers, radio, television and online channels made by journalists.
- 2. The new face.** Organisations are media producers by establishing blogs, videoblogs, intranets or maintaining own channels on platforms like YouTube, Instagram, etc.
- 3. The future face.** Strategic mediatisation where all opportunities are taken and alliances with media corporations are built to address audiences through content marketing, native advertising and brand journalism.

The future face of mediatisation is also called strategic or reflective mediatisation. There is a blurring line between advertising and media content in traditional media on the one side, and production of media content and channels by all types of organisations, corporations, non-profits and governmental organisations on the other. News has never been driven by media corporations alone – studies in the second half of the 20th century found that 25% to 80% of news content was influenced by ‘information subsidies’ given by public relations practitioners (Verčič & Sriramesh, 2020). But the situation has qualitatively changed at the turn of a new century: From providers of information subsidies (Gandy, 1982), communication professionals transformed into media

producers and creators of news and stories (Verčič & Tkalac Verčič, 2016). New practices of media production like brand journalism, content marketing and native advertising are only the most visible manifestations of the new reality.

TOWARD A POST-LITERAL SOCIETY

We live in a visual society (Machin, 2014). Communication practitioners strongly agree with this – 94.4% of the respondents in the ECM 2017 believed that visual communication will grow in importance for European organisations.

However, practitioners admit that, beside taking instant photos (which nowadays everybody with a smartphone thinks he or she can do), their skills for good production are quite limited. Creating business graphics, taking professional photos, shooting online videos, creating infographics, editing signs and symbols, shooting professional movies, generating online animations and designing spaces (room setups and 3D-designs) is beyond the scope of many communicators in Europe.

Advertising has been traditionally strong on visualisation of its appeals, while public relations was stronger on words. However, it would be wrong to assume that the integration of different communication disciplines in organisations alone ensures a high quality of message visualisation. Wiesenberg and Verčič (2021) postulated that “integrated communication is a physical process of complementing different communication disciplines, while strategic visual communication management is a chemical process devised to produce a different quality of results” (p. 233).

Literacy, being able to write well in one’s language (and often in English if it is not one’s mother tongue), has always been on the top of competencies required for entry into the communication profession. Written literacy will become complemented with visual literacy.

It is too early to say what will be the consequences of visualisation of communication that could easily bring us into a post-literal

society, and what consequences that may have on professional communication. Written documents allow falsifiability, written information can be verified, proven true or false. Providing honest and truthful information has always been the foundation of professional communication. It is far from clear that the same rules apply in a digital post-literal world. Traditional authorities are breaking down, which was evident at the time of Brexit in the United Kingdom and during the COVID-19 pandemic, when an opinion formed during web browsing got equal treatment to academic education and professional training in medicine.

This seems to be a new quality of hypermodern times in which we live (Verhoeven et al., 2018). It is worth noting that these examples occurred before a general introduction of artificial intelligence (AI), when ChatGPT has reached 100 million monthly active users in January 2023, just two months after launch thus becoming the fastest growing platform in history. Its AI siblings for generation of visual content, like DALL-E, Flair.ai or Midjourney, offer opportunities beyond our imagination.

“The digitalisation of communications is driving its datafication and strategisation. Social media and social networks, often used via smartphones, shape today’s omnichannel communication. We are witnessing an amalgamation of communication disciplines in organisations, and a hybridisation of formats in the media. Trends towards greater visualisation of content are leading us into a post-literal society enhanced by augmented and virtual realities that will soon multiply into parallel worlds.”



PROF. DR. DEJAN VERČIČ, RESEARCH TEAM

3 THESES ON HOW TO REACH AND IMPACT AUDIENCES

1. There is a clear convergence of importance of all communication channels. Today, effective and efficient stakeholder communication must be conducted omnichannel via all suitable platforms and media.
2. The hybridisation of media content exemplified by brand journalism, content marketing and native advertising requires a deeper integration of communication disciplines in organisations.
3. The visual turn in strategic communication through advancements in digital media, augmented reality (AR), virtual reality (VR) and parallel worlds (e.g., the Metaverse) calls for new approaches and solutions.

4

**LEAD AND MOTIVATE
EXTRAORDINARY
TEAMS**

Many organisations have developed new models of team building and leadership with a focus on participation and inclusion to meet societal changes in a hyper-modern world. Communication departments and professionals have also been portrayed as active agents that advocate for these changes in their organisations. The European Communication Monitor is one of the few studies that consistently and periodically has examined leadership and team building in the communication management field.

HOW LEADERSHIP MAKES A DIFFERENCE IN COMMUNICATION TEAMS

The 60th anniversary issue of the prestigious California Management Review provides an overview on cutting-edge research in business administration that traces critical challenges for the future of leadership in organisations (Vogel, 2017b). One of the key challenges leaders in organisations face is to foster a culture that contributes to business success. A critical topic debated in this field is the convergence of top-down perspectives mainly focusing on the behaviour of leaders and bottom-up perspectives taking into account how team members think and act, resulting in concepts of partnership (Plachy & Smunt, 2022).

The ECM studies have transferred this debate to the body of knowledge in communication management. The first approach in 2011 researched leadership styles in communication departments (Werder & Holzhausen, 2009) in connection with corporate culture (Ernest, 1985). In contrast to research in the United States that advocates for a transformational leadership style which appeals to follower's ideals and values in communication departments (Berger & Meng, 2014), the ECM data unveils a preference for the inclusive leadership style among communication executives in Europe (ECM 2011). This approach focuses on shared power and collaborative decision-making. It is not surprising that the inclusive style is more prevalent in integrated cultures which are participative and proactive and typical of the Old Continent. Interestingly, professionals

who apply an inclusive leadership style also hold more power: They have better access to the board and to the tables where decisions are made (Moreno et al., 2014).

A second deep dive into the connection between leadership and culture in 2018 identified consistent results about the role of organisational culture and leadership performance for the effectiveness and efficiency of communication departments and agencies. Communication teams are always embedded in their organisations (Tench et al., 2017). It is therefore not surprising that organisational culture is a determining factor for leadership in communications: participative cultures enable communication leaders to perform inclusive leadership. This is reflected in the assessment of leadership quality. Across Europe, the mean score for the highest ranking communication professionals in terms of being an excellent leader is 5.11 (on a 7-point scale) in consultancies, 4.86 in private companies, and 4.49 in governmental organisations (ECM 2018).

Having good communication leaders is also a determinant for communication success. Excellent leadership impacts communication performance positively if it raises (1) the job satisfaction and (2) the commitment of team members who manage and execute communication activities in their daily work.

To what extent does this happen in practice? The link between leadership and job satisfaction has been researched by applying the Leadership Report Card method developed by The Plank Center (Berger et al., 2015, 2017, 2021; Meng et al., 2019a) to the communications profession in Europe. The performance of communication leaders and their units was assessed on five dimensions: organisational culture, leader performance, trust in the organisation, work engagement, and overall job satisfaction (ECM 2018). Based on a structural equation model, Figure 13 shows that a supportive organisational culture and the performance of the communication leader predict the level of overall job satisfaction. This is mediated by work engagement and trust in the organisation. What can we learn from this? Quite simply: Leadership makes a difference – so educating, mentoring and promoting leadership skills in communications should be a priority for all organisations.

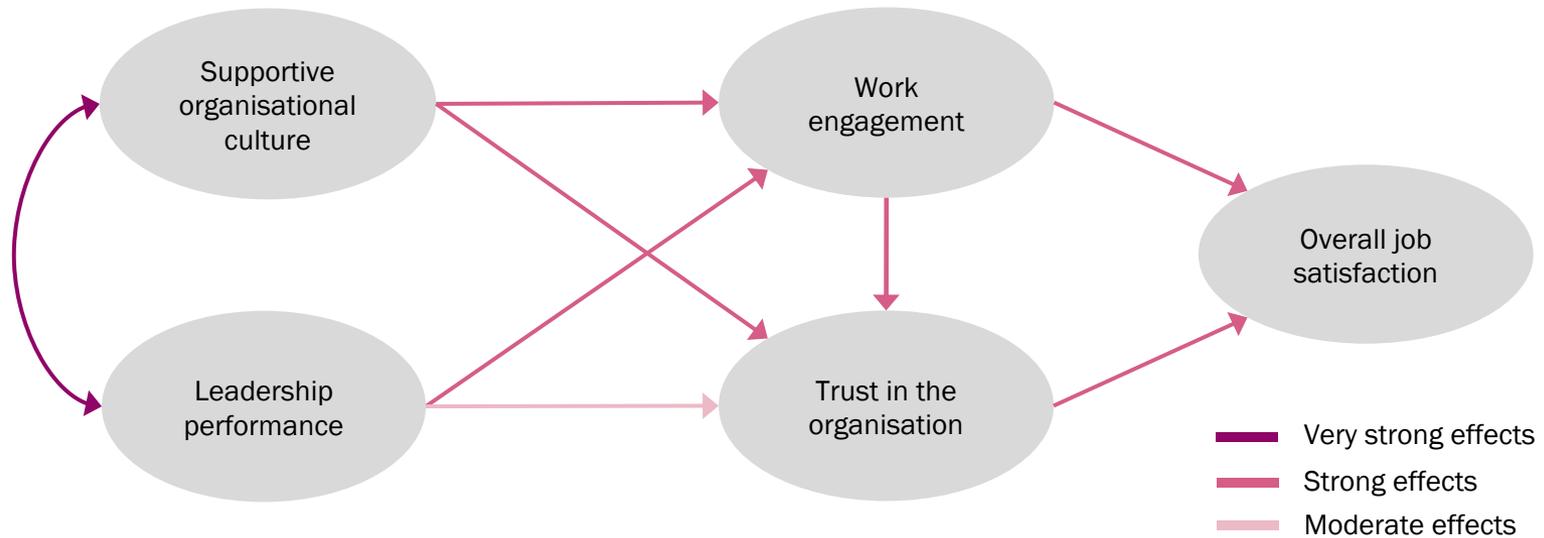


FIGURE 13. The influence of organisational culture and leadership performance on job satisfaction in communication teams (ECM 2018).

The link between leadership and organisational commitment has been addressed in the ECM 2022 study. This research focused on empathic leadership, a phenomenon which became popular during the COVID-19 pandemic when the well-being of employees came to the centre of discussions. Empathy refers to ‘standing in the shoes’ of another person and attempting to see the world from that person’s point of view. Empathic leaders demonstrate that they truly understand what followers are thinking and feeling. Empathy enables leaders to show individualised levels of consideration to followers (e.g., Avolio & Bass, 1995), to recognise emotions in others (Rubin et al., 2005) and to be aware both of themselves and of the context (Walumbwa et al., 2008). Furthermore, empathy enables leaders to use motivational language to strengthen engagement (Tao et al., 2022). The European Communication Monitor has adapted the established Emotional Competence Inventory by Boyatzis et al. (2000) to research various dimensions of empathic leadership in communication management.

Results are truly positive: seven out of ten communication practitioners in Europe report that their leaders show empathic leadership traits. The top three ways that leaders show empathy are by caring about the personal well-being of others and showing sensitivity and understanding, by identifying team members’ strengths and limitations, and by paying attention with good listening skills (ECM 2022).

A regression model proves that several attributes of empathic leadership help to raise commitment (Figure 14). This means: Practitioners working for an empathic leader in a communication department or agency develop a significantly stronger bond to their organisation, which helps them to perform better.

Apart from that, empathic leadership is also positively correlated with work engagement (which confirms earlier research mentioned above) and the mental health of team members (Montano et al., 2023), and negatively correlated with the turnover intention of communicators (ECM 2022).



FIGURE 14. Empathetic leadership improves commitment (ECM 2022).

DRIVING JOB SATISFACTION AND AVOIDING STRESS

Communication practitioners need to navigate the dynamic context of organisations, stakeholders, and opinion building in hypermodern societies (Tench et al., 2017). The complexity and simultaneity of these challenges can cause stress and reduce job satisfaction. This is not new, but the debate about changing work conditions and its impact on people has increased in recent years.

A systematic review of the literature on the effects of digital technologies in the workplace highlights the dark side of digital work, ranging from technostress and work overload to anxiety and addiction (Marsh et al., 2022). Not surprisingly, these discussions have also reached the communications profession, which is in the top ten in a ranking of the most stressful jobs by CareerCast (2019).

The European Communication Monitor shows that four out of ten communication practitioners (39.0%) feel tense or stressed out during their working day (ECM 2018). Women are more likely to be

affected than men. A key problem is that a quarter (25.0%) of all communicators surveyed do not have the appropriate resources to manage the daily stress they experience.

The main drivers of work stress among communicators are related to four factors (ECM 2018): the need to be constantly available outside working time to access emails and phone calls (rated as significant by 35.6% of practitioners), overall work load (35.5%); lack of opportunity for growth or advancement (34.0%) and work interfering during personal or family time (30.4%). The last aspect has become even more important since then, as work-life boundaries have become more permeable due to hybrid work routines introduced during and after the COVID-19 pandemic (Chan et al., 2023).

Knowing how to avoid or manage stress is only one side of the coin when leading and motivating communication teams. Equally important are efforts to increase job satisfaction. The European Communication Monitor (ECM 2010, 2014, 2018) and parallel studies on other continents (Macnamara et al., 2015, 2017; Meng et al., 2019; Moreno et al., 2015, 2019) have contributed to the scarce research on job satisfaction in the field (Kang, 2010; Lwin & Zeffass, 2016; Meng & Berger, 2019; Moreno et al., 2022). The longitudinal evaluation is quite positive: between two-thirds and three-quarters of four communication practitioners in Europe feel satisfied with their job. Nevertheless, overall satisfaction (measured on a 7-point scale) has decreased slightly over time, from 5.33 in 2010 and 5.27 in 2014 to 5.15 in 2018 (ECM 2010, 2014, 2018).

The most important drivers of job satisfaction identified in a regression analysis of ECM 2018 data are the interesting and manifold tasks associated with working in communications (agreed upon by 70.9% of the respondents), followed by great career opportunities, and feeling valued by superiors and clients. Every second practitioner confirms that her or his job in communications has a high status and is also secure and stable. But both attributes are the least important predictors for job satisfaction (ECM 2018). These insights help communication leaders to design meaningful role descriptions and incentive schemes.

One of the most interesting insights derived from the ECM 2018 data is the strong correlation between job satisfaction and the willingness to stay with your current employer (Figure 15). Practitioners that want to stay in their position or step up to the next level in the same communication department or agency report a higher level of job satisfaction (5.8 or 5.6 on a 7-point scale). Those who want to change the employer or even move out of communications are significantly less satisfied. This has been confirmed in other parts of the world and is particularly important for attracting and retaining talent among Millennials (Moreno et al., 2022).

The ECM findings over the years also show that not all communicators are equally satisfied. Male professionals and those working further up in the hierarchy report higher levels of job satisfaction. These differences raise questions about diversity, equality, and inclusion in communication teams.

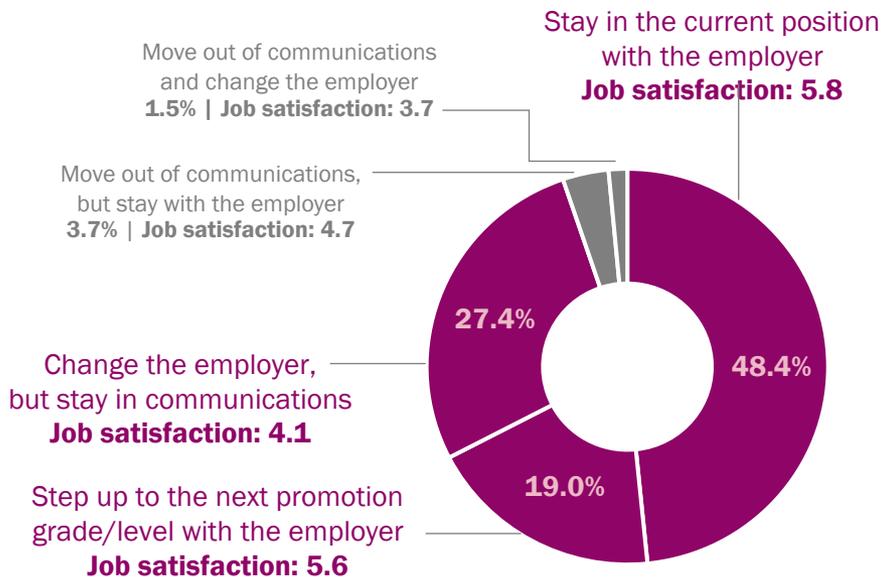


FIGURE 15. Correlation between job satisfaction and willingness to change (ECM 2018).

DIVERSITY, EQUALITY AND INCLUSION

A key leadership challenge described in the special issue of the California Management Review mentioned above (Vogel, 2017b) is that it remains difficult to develop systems that effectively foster creativity in teams. However, this is necessary to nurture innovation as a prerequisite for remaining competitive in a globalised world. A solution that has been intensively discussed in recent years is the enhancement of staff diversity. The business case for diversity argues that more diversity in organisations leads to more creative and inclusive thinking, strengthens an organisation's social license to operate, creates more success in the marketplace, and thus provides a competitive edge (Herring, 2009; PRovoke Media et al., 2022).

Concepts like diversity, equality and inclusion (DEI) have been introduced progressively in the business and management vocabulary (Sethi & Cambrelen, 2022). They shape the political agenda in most European countries and influence organisational policies and communications alike. The original debate on diversity has expanded to a broader conception including fair treatment of everybody (equality) and building a culture of being seen, heard, and valued (inclusion) (Mor Barak, 2022). The acronym DEI (Diversity, Equality and Inclusion) stands nowadays for a broad debate in communication management research. This debate asks questions about the role DEI should play in communication departments and agencies (e.g., Bardhan & Gower, 2022; International Communications Consultancy Organisation, 2022). Conversely, it also examines how communicators incorporate DEI aspects in their daily work and how they support organisation-wide DEI initiatives (e.g., Institute for Public Relations, 2021).

The first dimension has been explored by the ECM 2022. The incorporation of ESG criteria (Environmental, Social, Governance) in regulatory frameworks and shareholder assessments for companies

across Europe has accelerated DEI practices in recent years. Some communication departments are now responsible for assessing and reporting on such practices in relation to specific indices (e.g., *STOXX ESG Global Leaders Index* or *IBEX Gender Equality*). In terms of developing a highly inclusive workplace, internal communication about DEI is key to increase the perception of inclusion (Wolfgruber et al., 2021a, 2021b). The ECM 2022 shows that most European practitioners recognise this; they state that adequate communication about DEI impacts the trust of internal (70.7% agreement) and external (74.6%) stakeholders. Six out of ten communication departments and agencies are already involved in DEI initiatives, but only about three out of ten are responsible for it.

Looking at the relevance of DEI for day-to-day practices in communications, it becomes clear that most communication departments and agencies consider such aspects when developing verbal or visual content (69.4%). However, this is mainly limited to aspects such as age (51.6%), ethnicity (50.9%), and gender (50.5%). Other and likely more contested dimensions like socio-cultural status (39.3%), worldviews and political opinions (30.9%), or spiritual beliefs (26.7%) are less often considered (ECM 2022).

While DEI may be an opportunity for communication departments and consultancies to achieve more responsibilities, the ECM 2022 highlights the paradox that ‘cobblers walk barefoot’ in the profession. Only one-third of communicators across Europe believe there will be an actual shift toward diversity in the workforce of their departments or agencies in the near future (38.7%).

There are no multidimensional empirical studies with European scope on the composition of communication teams and whether this has changed in recent years.

However, the female workforce and gender inequalities have been prominent research topics, to which the European Communication Monitor has contributed with several editions over the last 15 years.

“Leadership makes a difference in communication. Educating, mentoring and promoting leadership skills should be a priority to retain the talent into collaborative, committed and DEI inclusive teams to advocate these changes for organisations and clients”



PROF. DR. ÁNGELES MORENO, RESEARCH TEAM

TACKLING THE GLASS CEILING

An ongoing challenge for leaders in today’s organisations is how to harness the skills of female colleagues in the workplace (Vogel, 2017a). Gender issues have been widely debated in business (e.g., *LeanIn.Org & McKinsey, 2022*) and communications in the last few years (e.g., *Global Women in PR, 2022*). Industry reports and recent academic meta-studies (Place & Vardeman-Winter, 2018; Topić et al., 2020) confirm that gender inequalities and discrimination persist in communication practice.

Every year since 2007, the European Communication Monitor has surveyed the situation and development of the female workforce in communication management across Europe. Although most practitioners acknowledge an improvement in gender equality in their countries, longitudinal data shows that three out of four communication departments and agencies in Europe employ more women than men, but still only one in two managers is a woman and they are paid less (ECM 2018, 2020, 2022).

The so-called glass ceiling or cement ceiling (Zeler et al., 2022), a paraphrase for invisible barriers that keep female practitioners from rising in the hierarchy, persists in communications all over Europe. Denial of the glass ceiling has persisted over the decades as well and can be seen most frequently among male practitioners (ECM 2014, 2020). Regardless of their own gender, one-third of European communication practitioners do not acknowledge the glass ceiling as a problem at all (ECM 2020). Those who do so believe it primarily affects the communication profession as a whole (42.6%), but less so their own communication department or agency (22.3%) and female colleagues working in similar positions to themselves (22.4%).

What prevents female communicators from reaching top positions? The two factors most often mentioned in the ECM 2022 are related to organisational policies: Working conditions that do not offer enough flexibility to accommodate family commitments (61.6%) and non-transparent promotion policies (57.9%). Recent

research demonstrates the nature of these imbalances (Moreno et al., 2021b). Looking ahead, the Theory of Integrated Gendered Work Evaluation (Moreno et al., 2021a) offers a new way to identify, contextualise, theorise, and analyse how gender discrimination affects work evaluation, combining both workplace and personal life experiences.

Summarising, the Comparative Excellence Framework for Communication Management applied in the ECM studies (see p. 6) offers hope. First, high-performing communication departments are more often characterised by inclusive leadership, empathy, and a supportive culture. Second, they make practitioners more satisfied and less stressed or better able to handle stress. Third, they believe DEI has a stronger impact on the composition of their teams, and they are more involved in DEI initiatives in their organisations. Last but not least, they report fewer problems with gender inequalities and glass ceiling issues that hinder the career plans of female communicators (ECM 2022).

3 THESES ON HOW TO LEAD AND MOTIVATE COMMUNICATION TEAMS

1. Communication leaders should reinforce inclusive leadership based on shared power and collaborative decision-making to nurture a supportive team culture.

2. Job satisfaction resulting from interesting tasks, career opportunities, and appreciation by superiors is a key driver for commitment among communicators – leveraging this must be a priority.

3. Combining the experiences and skills of diverse colleagues will enable communication departments and agencies to support organisations' diversity, equality, and inclusion initiatives with solid expertise.

5

**BUILD RELATIONSHIPS
IN TIMES OF
MISINFORMATION
AND DISTRUST**

Over recent years and in many countries trust in the media and other institutions has been declining. At the same time practices of strategic communication have come to be increasingly associated with the development of a so-called ‘post-truth society’ (Ihlen et al., 2019). Among communication professionals, this trend raises concerns over the perceived legitimacy of strategic communication practices and of the profession as a whole (Edwards, 2021). This comes as an issue, not least as communicators need to be trusted internally and externally in order to build sustainable relationships with stakeholders and achieve communication goals. Over several years, the ECM has created insight into important social trends that affect levels of trust in communications, into how these trends may impede on communicators’ abilities to build relationships, and how practitioners may manage and respond to emerging challenges.

CHALLENGES OF INFORMATION DISORDER

While the rise of social media platforms over the past decades has opened up increasingly dynamic spaces for meaningful and interactive stakeholder engagement (Johnston, 2023), it has also spawned new challenges for effective communication management (Buhmann et al., 2021). One major challenge is that the rise of social media and other online platforms has made it easy for false or inaccurate information to spread rapidly and widely (Cheng & Lee, 2019). Content on social networking sites is shared in real-time and with little ability for editorial filtering or fact-checking. As a consequence, misinformation is now a common occurrence in digital online environments (Caled & Silva, 2022).

The proliferation of misinformation and related harmful forms of ‘information disorder’ (see box) poses severe challenges for effective communication management (e.g., when stakeholders can no longer be convinced based on facts; Mills & Robson, 2020), and can have significant negative effects on an organisation’s trust,

reputation, and relationships (Plangger & Campbell, 2022). Moreover, research suggests that information disorders are damaging the general public’s trust in institutions and society at large (Chen & Cheng, 2019). As such, information disorder, and especially fake news, which disguise false or misleading information as real news, have become key issues in need of being understood, monitored, and managed by professional communicators (Jahng et al., 2020).

► KEY CONCEPTS IN INFORMATION DISORDER

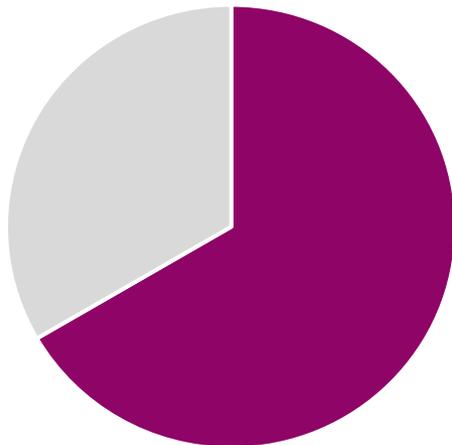
1. **Misinformation.** A piece of content that is false and/or misleading.
2. **Disinformation.** When misinformation is intentional, e.g., to purposefully mislead or cause harm.
3. **Fake news.** A form of disinformation made to look and feel like real news.
4. **Malinformation.** Reconfigured truthful information set to deceive (e.g., taken out of context).

Data from the European Communication Monitor shows that the phenomenon of fake news is perceived as an especially problematic issue for communicators in the political and non-profit space: one third of the communication departments in government-owned, public and political organisations report to deal with fake news as part of their daily work (ECM 2018). Corporate communicators in businesses, however, seem least concerned: Less than one fifth of them feel that fake news affects what they do day-to-day. Likely, fake news and related challenges of information disorder will remain a challenging issue for the profession. Recent research suggests that this is true especially in contexts of online crisis communication (Cheng & Lee, 2019), where important expectations of key stakeholders are threatened.

Communication practitioners in affected organisations report social media as the main origin of fake news. 59.6% of them, however, also name journalistic mass media (e.g., newspapers, TV) as sources of false information. In most cases, fake news attack the organisation and its brands. But products or services and individual persons (e.g., top management) are also mentioned as common targets. Most organisations rely on the competencies and experience of their communication staff to identify fake news; only a minority has adopted more structured approaches (Figure 16). A cluster analysis on data from the ECM 2018 revealed that only 12% of all European organisations had established advanced approaches to tackle information disorder. Alarmingly, almost every fifth (19.6%) did not find it necessary to prepare for tackling fake news. This may improve with the availability of AI-based detection tools; but it is still unclear how powerful such solutions are in daily practice.

Preparation to identify (potential) fake news

“We rely on individual competencies/ experience of our communication staff”

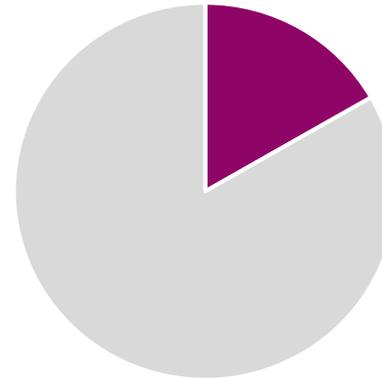


All organisations:
66.6%

Organisations that were affected by fake news: **73.6%**

Organisations not affected by fake news: **63.9%**

“We have implemented formal guidelines/routines”

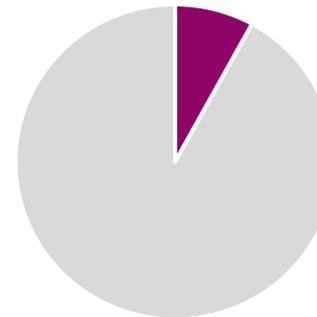


All organisations:
16.7%

Organisations that were affected by fake news: **27.5%**

Organisations not affected by fake news: **12.6%**

“We have installed specific technologies/systems”



All organisations:
8.0%

Organisations that were affected by fake news: **13.7%**

Organisations not affected by fake news: **5.8%**

FIGURE 16. Identifying fake news (ECM 2018).

TRUST AS A KEY RESOURCE IN THE 'POST-TRUTH SOCIETY'

As communicators need to be perceived as ethical and trustworthy in order to effectively engage stakeholders and achieve communication goals, it is pivotal for organisations to develop a nuanced understanding of declining trust and its implications at various levels. To grasp the state of trust in communications, extant perceptions of trust in communications need to be assessed separately in the context of different key stakeholders, such as consumers and clients, internal stakeholders, but also journalists, bloggers, influencers and the general public. Furthermore, the question of trust in communications can be asked at several levels, i.e., the level of individual communication professionals (micro), of communication departments and agencies (meso), as well as of the communication profession at large (macro).

Data from the European Communication Monitor 2019 shows that between these three levels, trust in communications as a profession is lowest, especially so among journalists and the general public (Figure 17). Practitioners experience most trust on the micro level. Across all levels, top executives and internal clients are seen as the most trusting in communication.

Furthermore, the challenges of trust in communication arise not only for departments, individuals, and the communication profession at large but also for all further entities that communicate on behalf of organisations. These may be CEOs or other members of the top management team, sales professionals, employees in general or consumers that speak as advocates for organisations. Choosing these communicators and including them in integrated communication efforts as ambassadors is a central element of communication management today (Brockhaus et al., 2020).

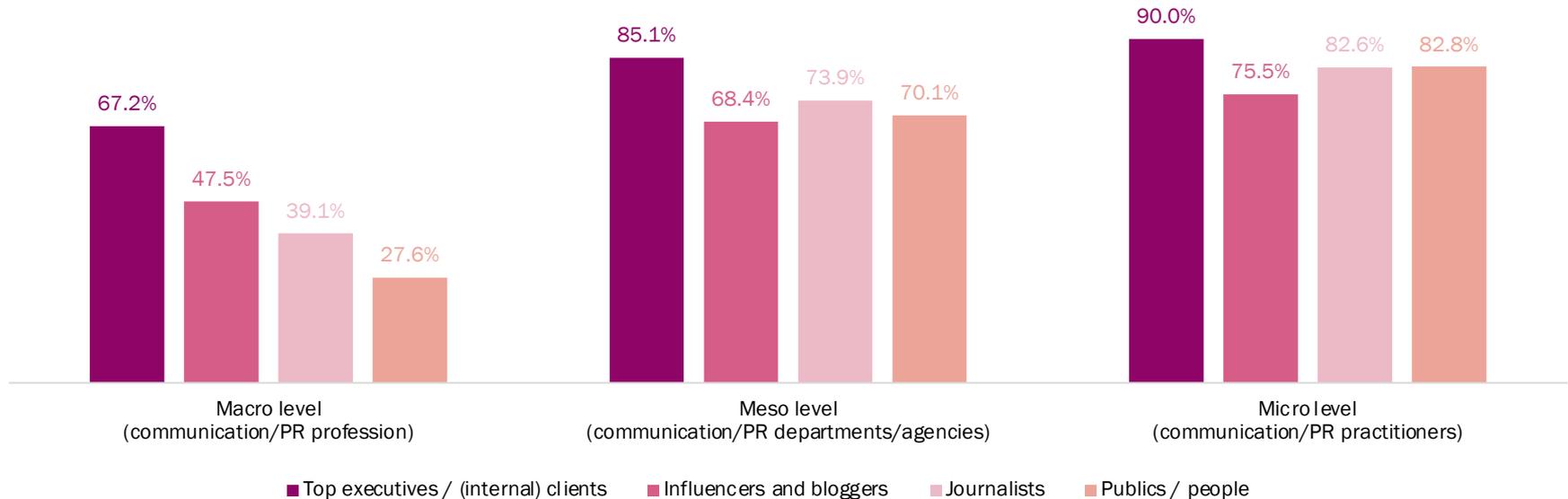


FIGURE 17. Trust in organisational advocates (ECM 2019).

For instance, when regular employees are regarded as more credible than CEOs or board members (Edelman, 2019), the former can be important actors of effective communication (Andersson, 2019) – especially those that have their own strong social networks and can act as corporate influencers (Enke & Borchers, 2019). Surely, the trend of declining trust on the one hand and the rise of social media as immediate and potentially more authentic channels for communication used by all members of the organisation on the other hand have strengthened the role of regular employees as communicators for organisations. Recent research suggests that authentic forms of communication that narrate through emotionally engaging stories are a central element to effective communication in contexts where trust is scarce, such as in crisis situations (Cheng & Lee, 2019).

Data from the ECM 2019 shows that external experts are considered the most trusted when speaking on behalf on an organisation. While employees are seen as more trusted than communication professionals, they are less trusted than organisational leaders, such as CEOs or other top executives (Figure 18). Interestingly, while communicators state that general employees are more trusted than communication professionals, the difference is not as strong as earlier research suggests. Nonetheless, recent studies suggest that employee advocacy continues to play a key role in issues management and shaping an organisation's reputation (Thelen, 2020) and in gaining trust through transparency (Madsen, 2022).

In the 'post-truth society', enhancing trust by key stakeholders (e.g., for the brand, the business sector, or organisational leaders) has become a central overarching goal in the daily work of communication and public relations professionals. This can be expected to further dominate the agenda as a top strategic issue in communication management over the coming years (ECM 2022). Among the challenges of effectively building trust, being transparent (i.e., telling what you know and disclosing contexts) is perceived

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

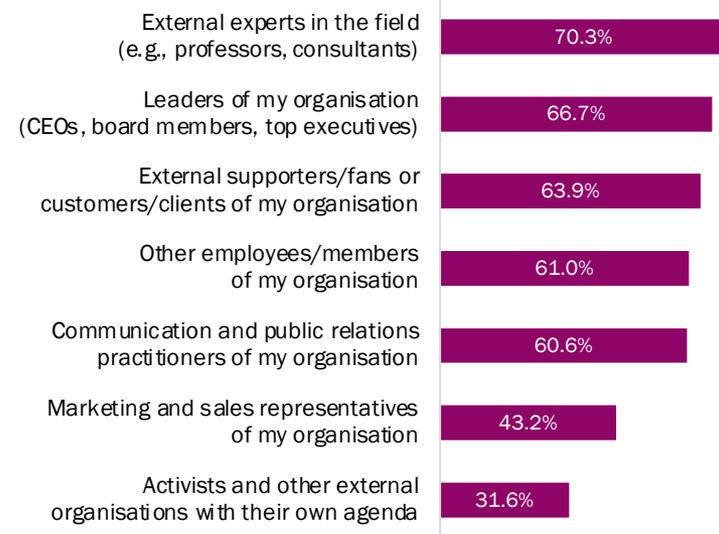


FIGURE 18. Trust in organisational advocates (ECM 2019).

as the most difficult to achieve, clearly outranking other key challenges in trust-building, such as adherence to moral expectations as well as facts-based and solution-oriented communication (ECM 2019). When breaking down the challenge of being transparent in communications, purpose and mission as well as products are among the least difficult for an organisation to be transparent about, while the political stance of the leadership team is the most difficult. This is likely associated with the widely-discussed risks that come with CEOs speaking out for political and social causes (Bedendo & Siming, 2021). These risks notwithstanding, CEOs are becoming increasingly important in engaging with publics directly to build meaningful interactions and robust organisation-public relationships (Tsai & Men, 2017).

DEALING WITH MORAL HAZARDS IN TIMES OF MISINFORMATION

On the bright side, digital communication technologies offer ever new opportunities for organisations to engage stakeholders (Freberg, 2021; Luama-aho & Badham, 2023). This goes for strictly human-centered forms (such as in social media influencer communication), for human-in-the-loop configurations (such as in AI-assisted analytics), as well as for completely autonomous communication (such as in chatbots and generative AI).

However, the capabilities of new digital communication technologies, specifically those driven by emerging AI technologies (e.g., AI-based content generation), pose profound ethical challenges to communication professionals. Almost every second practitioner experiences several ethical challenges in her or his day to day work (ECM 2020). Furthermore, comparison with prior ECM data from 2012 suggests that such daily encounters with moral hazards are clearly on the rise. This highlights the need to understand how communication professionals respond to moral hazards and how they make ethical decisions in the practice.

When weighting alternatives in the face of pending moral decisions, practitioners can rely on different resources: On the macro level, they can draw on national and international standards (ethical codes of practice) provided by professional associations, such as the Code of Athens. On the meso level, within their organisations, practitioners may resort to internal or institutional guidelines. On the micro level, practitioners can rely on their own personal values and beliefs.

Data from the ECM 2020 shows that national and international standards, which are often taught in training courses or at universities are least relevant here (Figure 19). Three out of four practitioners proved to rely on ethical guidelines issued by their own organisation. And a clear majority used personal values and beliefs, for example those based on family tradition, education or religion.

Resources used when dealing with ethical challenges



FIGURE 19. Dealing with ethical challenges (ECM 2020).

While this data shows that communication practitioners rely most on personal values, it also indicates that current guidelines in the communications field are either not widely known or they are not focused and specific enough to give real support to practitioners in their daily work. This is particularly noteworthy, as professional ethics guidelines may be especially needed when autonomous technologies and artificial intelligence become more and more embedded in communication activities as well as in their management (Buhmann & White, 2022) – this goes especially for forms of autonomous and generative AI, where protection against misuse and abuse are especially needed.

Data from the ECM 2020 has shown that two out of three communication practitioners (67.6%) find using bots to generate feedback and followers on social media extremely or very challenging in terms of ethics. This, once more, points to the value of more engaged professional guidelines for understanding, monitoring, and effectively combatting misinformation and fake news on behalf of clients and organisations (Jahng et al., 2020).

“Mis- and disinformation pose seminal challenges within our increasingly digitalised information societies. Tackling the various forms of information disorder is now a priority issue for many, including strategic communicators who are looking to build and maintain trust. As new platforms and AI-driven tools are set to further exacerbate these challenges, the search for ways to achieve purpose-driven and authentic stakeholder engagement will occupy practitioners and researchers alike.”



ASSOC. PROF. DR. ALEXANDER BUHMANN, RESEARCH TEAM

3 THESES ON HOW TO BUILD RELATIONSHIPS IN TIMES OF MISINFORMATION AND DISTRUST

1. Social media platforms have created an environment in which misinformation thrives – communicators should use contemporary digital tools to monitor and challenge information disorder.

2. Authenticity, emotional engagement, and storytelling are key to effective communication in a post-truth society, especially when stakeholders are highly involved, such as in crises.

3. More investment in concrete and applicable ethics guidelines is needed as the shift to autonomous forms of communication assisted by AI brings new challenges for building and maintaining trust.

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BACKGROUND

ABOUT

The European Communication Monitor (ECM) is the largest and longest running transnational study on strategic communication and communication management worldwide. It has been conducted annually since 2007 with almost 40,000 participating communication professionals from 50 countries overall. A joint project by academia and practice, it has been organised by the European Public Relations Education and Research Association (EUPRERA) and the European Association of Communication Directors (EACD), supported by several partners and sponsors, esp. premium partner Cision and Fink & Fuchs as digital communications partner. The Nordic Alliance for Communication & Management (#NORA) hosted by BI Norwegian Business School, Oslo, and the Center for Strategic Communication (CECOMS) at IULM University, Milan, support as regional partners. Other partners supported previous editions.

The ECM is an academic study fulfilling high quality standards of social science research. The study has been designed and executed by a team of renowned university professors representing different countries: Ansgar Zerfass and Dejan Verčič (since 2007), Ángeles Moreno and Ralph Tench (since 2008), Piet Verhoeven (2007–2020), Alexander Buhmann (since 2021), Sven Hamrefors (2007), Adela Rogojinaru (2007) and Betteke van Ruler (2007). A network of national research collaborators (see p. 60) ensures that the survey reflects the diversity of the field and country contexts.

Practitioners participating in the ECM surveys answer a comprehensive questionnaire that collects a variety of independent and dependent variables in a unique research framework: personal characteristics of communication professionals; features of the organisation; attributes of the communication department; the current situation of the professional and the organisation; and perceptions on future developments.

All research questions and empirical instruments used in the studies are based on a thorough analysis of the international body of knowledge.

The ECM has developed numerous outputs that are used by both the academic community and by practice to generate change and impact. The authors have developed and applied the Comparative Excellence Framework for Communication Management (see p. 6) which identifies drivers of good practices in communications, and designed and implemented a competency model that can be used directly by practitioners. The ECM has also contributed to over 60 academic journal publications on data collected in the project and a book “Communication Excellence” summarising key insights, which is available in English, Croatian, Slovenian, Spanish and Chinese (Tench et al., 2017, 2023a, 2023b; Moreno et al., 2023; Zerfass et al., 2021).

Parallel surveys have been initiated by the ECM team in Asia-Pacific, Latin America and North America. The Global Communication Monitor series covers more than 80 countries. More than 6,000 practitioners have been surveyed in each wave of the biannual comparative study between 2014 and 2023.

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- An **interactive benchmarking tool** on the project website allows communication professionals to compare their performance against the study results.

METHODOLOGY

Each online questionnaire used for the European Communication Monitor until 2023 consisted of 30 to 40 questions. Some of these questions were only presented to professionals working in communication departments or to those who work in consultancies and agencies. Instruments used dichotomous, nominal and ordinal response scales. They are based on research questions and hypotheses derived from previous research and literature. All surveys used the English language and were pre-tested with communication professionals in different European countries. Several thousand communication professionals throughout Europe were invited each year with personal e-mails based on a comprehensive database built by the research team over a decade. Additional invitations are sent via the EACD, national research collaborators and professional associations.

Answers from participants who could not clearly be identified as part of the population were always 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 solely on snowball sampling or which include students, academics and people outside of the focused profession or region. The Statistical Package for the Social Sciences (SPSS) was used for data analysis. Results are tested for statistical significance with, depending on the variable, Chi², ANOVA / Scheffé Post-hoc-Test, independent samples T-Test, Pearson correlation or Kendall rank correlation. The applied methods are reported in the footnotes and significant results are marked in the reports.

In total, 37,105 completed questionnaires from communication practitioners in 50 European countries have been collected in 16 editions of the ECM between 2007 and 2022. The average age of respondents is 41.8 years.¹ Seven out of ten are communication leaders: 41.1% hold a top hierarchical position as head of communication in an organisation or as chief executive officer of a

“The strong sample is a core asset of the ECM study. We have collected and analysed almost 40,000 completed questionnaires since 2007. But the project is not only impressive in its sheer size: Our multi-step procedure of data filtering and cleaning ensures an outstanding quality of the sample. Most of our data represents leading senior practitioners with profound qualification and experience in the profession.”



DR. JENS HAGELSTEIN, PROJECT MANAGER

communication consultancy or agency; 29.2% are unit leaders or in charge of a single discipline in a communication department. 60.3% of the professionals interviewed have more than ten years of experience in communication management. 57.7% of all respondents are female and a vast majority (94.4%) in the sample has an academic degree. More than two thirds hold a graduate degree or even a doctorate.

The majority of respondents work in communication departments in organisations (23.4% joint stock companies; 20.3% private companies; 16.6% government-owned, public sector, political organisations; 11.4% non-profit organisations, associations), while 28.6% are communication consultants working freelance or for agencies.

¹ Values reported here are unweighted mean values of all 16 surveys.

ORGANISERS

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NATIONAL COLLABORATORS

The European Communication Monitor series 2007–2022 has been supported by the following academic researchers as national research collaborators (in alphabetical order):

- Eleni Apospori (GR)
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- Valérie Carayol (FR)
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- Anne-Marie Cotton (BE)
- Alexandra Craciun (RO)
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- Finn Frandsen (DK)
- John Gallagher (IR)
- Sven Hamrefors (SE)
- Denisa Hejlová (CZ)
- Kevin Hora (IR)
- Øyvind Ihlen (NO)
- Emanuele Invernizzi (IT)
- Clio Kenterelidou (GR)
- Danijela Lalić (RS)
- Ryszard Lawniczak (PL)
- Vilma Luoma-aho (FI)
- Francesco Lurati (CH)
- Liudmila Minaeva (RU)
- Ayla Okay (TR)
- Evandro Oliveira (PO)
- Milko Petrov (BU)
- Sandrine Roginsky (BE)
- Adela Rogojinaru † (RO)
- Stefania Romenti (IT)
- Waldemar Rydzak (PL)
- Sónia Sebástiao (PO)
- Marina Shilina (RU)
- Mariana Sueldo (LT)
- Betteke van Ruler (NL)
- Ana Tkalac Verčič (HR)

ASSISTANT RESEARCHERS

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AUTHORS

PROF. DR. ANSGAR ZERFASS | LEAD RESEARCHER

Ansgar Zerfass is Professor and Chair of Strategic Communication at Leipzig University, Germany, and Professor of Communication and Leadership at BI Norwegian Business School, Oslo. He serves the community as Editor of the International Journal of Strategic Communication, USA and has published multiple books and journal articles on corporate and digital communications. | zerfass@uni-leipzig.de

PROF. DR. RALPH TENCH

Ralph Tench is Director of Research for Leeds Business School, Leeds Beckett University in the United Kingdom. His research on strategic communication, competency development, CSR, and health communication involves national and international funded projects from the private sector, the European Union, public health and research councils. | r.tench@leedsbeckett.ac.uk

PROF. DR. DEJAN VERČIČ

Dejan Verčič is Professor of Public Relations at the University of Ljubljana and Partner of the communication and strategy firm Herman & partnerji d.o.o., Slovenia. He is a Fulbright fellow and organises the prestigious International Public Relations Research Symposium BledCom with participants from five continents since 1994. | dejan.vercic@fdv.uni-lj.si

PROF. DR. ÁNGELES MORENO

Ángeles Moreno is Professor of Public Relations and Communication Management at University Rey Juan Carlos, Madrid, Spain, and a co-initiator of the Latin America Communication Monitor studies. Her research on multiple facets of communication management has been widely published in several languages across Europe, Latin America and North America. | mariaangeles.moreno@urjc.es

ASSOC. PROF. DR. ALEXANDER BUHMANN

Alexander Buhmann is Associate Professor of Corporate Communication at BI Norwegian Business School, Oslo, and Director of The Nordic Alliance for Communication & Management (#NORA). His research is situated at the intersection of communication, digital technology, and management with focus on reputation management, digitalisation, and artificial intelligence. | alexander.buhmann@bi.no

DR. JENS HAGELSTEIN

Jens Hagelstein is Research Associate at Leipzig University, Germany. He works as project manager for the European Communicator Monitor and has been a doctoral fellow of the European Public Relations Education and Research Association. | jens.hagelstein@uni-leipzig.de

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The European Communication Monitor will re-launch in 2024 with a new and exciting research design. Check www.communicationmonitor.eu for updates and follow the project on Twitter @ECM_CommMonitor

The European Communication Monitor is an international research project organised by the European Public Relations Education and Research Association (EUPRERA) and the European Association of Communication Directors (EACD) supported by premium partner Cision as well as partners CECOMS, #NORA, and Fink & Fuchs.

Almost 40,000 communication practitioners in 50 countries have been surveyed in annual studies between 2007 and 2022 to generate insights that stimulate practice, support theory development, and guide education in universities across the continent. Additional knowledge has been gained through parallel studies in Latin America, North America and Asia-Pacific.

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