EUROPEAN COMMUNICATION MONITOR

2016

EXPLORING TRENDS IN BIG DATA, STAKEHOLDER ENGAGEMENT AND STRATEGIC COMMUNICATION.

RESULTS OF A SURVEY IN 43 COUNTRIES.

10th Anniversary Edition

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

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Content

Foreword

As we are celebrating our 10th anniversaries, 2016 is a special year both for the European Association of Communication Directors (EACD) and the European Communication Monitor. The anniversary edition of the survey provides deep insights into the working environment and routines of European communicators and presents them with the trends and developments that are shaping our profession.

In the past decade, the conditions for the work of communication professionals have altered significantly. The survey results indicate how communicators are keeping up with developments affecting their industry and the new challenges they have yet to tackle.

Most communicators surveyed show a high interest in and follow the debate on developments caused by the digitalisation, which are highly significant to our profession. However, few communication departments have already implemented strategies and tools to cope with specific aspects of the digital evolution. This is strikingly evident when it comes to big data. Despite many communicators reporting the importance of big data to communication management, surprisingly few communication departments make use of big data analytics.

Algorithms of search engines and social media platforms also now have a huge impact on how our messages reach audiences – a development that most communicators agree on. But only a third of the respondents state that their departments adapt communication activities to these kinds of external algorithms. When it comes to creating or adapting content, few communicators believe in the importance of applying algorithms.

At the European Association of Communication Directors (EACD) we offer communication professionals a platform to connect, deepen their expertise and share best practices. Together with our members across Europe we build a network that aims to resolve collective challenges.

Our goal is to enable communicators to prepare for the next ten years. I invite you to explore the findings of the 10th annual European Communication Monitor in detail on the following pages.

Dr. Herbert Heitmann

President, European Association of Communication Directors (EACD)

Introduction

This 10th anniversary edition of the European Communication Monitors marks a milestone in the endeavour to generate state-of-the-art knowledge about strategic communication and public relations. What started as a small initiative by a group of colleagues in 2007 has grown into the largest and only truly global study of the profession with sound academic standards.

Today, more than 4,500 practitioners in over 80 countries are surveyed in each wave of the European, Latin American and Asia-Pacific Communication Monitor. For the first time ever, it is possible to track and prove the changing relevance of strategic issues and communication channels over a decade. Longitudinal data from more than 21,000 respondents across Europe reveal a rise and decline of digital and social responsibility, as well as the unsolved challenge of linking business strategy and communication. Face-to-face and social media communication are the most important instruments today, while press relations with print media have steadily lost in importance since 2011. Last but not least, the monitor research has introduced a unique approach to identify the characteristics of excellence for communication departments. A comprehensive overview of these findings for practitioners will be published later this year in the book "Communication Excellence – How to Develop, Manage and Lead Exceptional Communications" by Palgrave Macmillan, London.

Key topics covered in this report are the use of big data and algorithms in communications, stakeholder engagement, dealing with social media influencers, skills and competency development for communicators, and many more. Readers will profit from overall insights, statistical evaluations and detailed data for different types of organisations and countries, where applicable.

On behalf of the research team, I would like to thank everybody who participated in the survey as well as our national partners at 21 renowned universities. The support of assistant researchers Markus Wiesenberg and Ronny Fechner, Stefanie Schwerdtfeger and Vanessa Eggert at EACD, and our partner PRIME Research is much appreciated.

Prof. Dr. Ansgar Zerfass
Lead researcher; Professor and Chair in Strategic Communication, University of Leipzig, Germany &
European Public Relations Education and Research Association (EUPRERA)

Research design
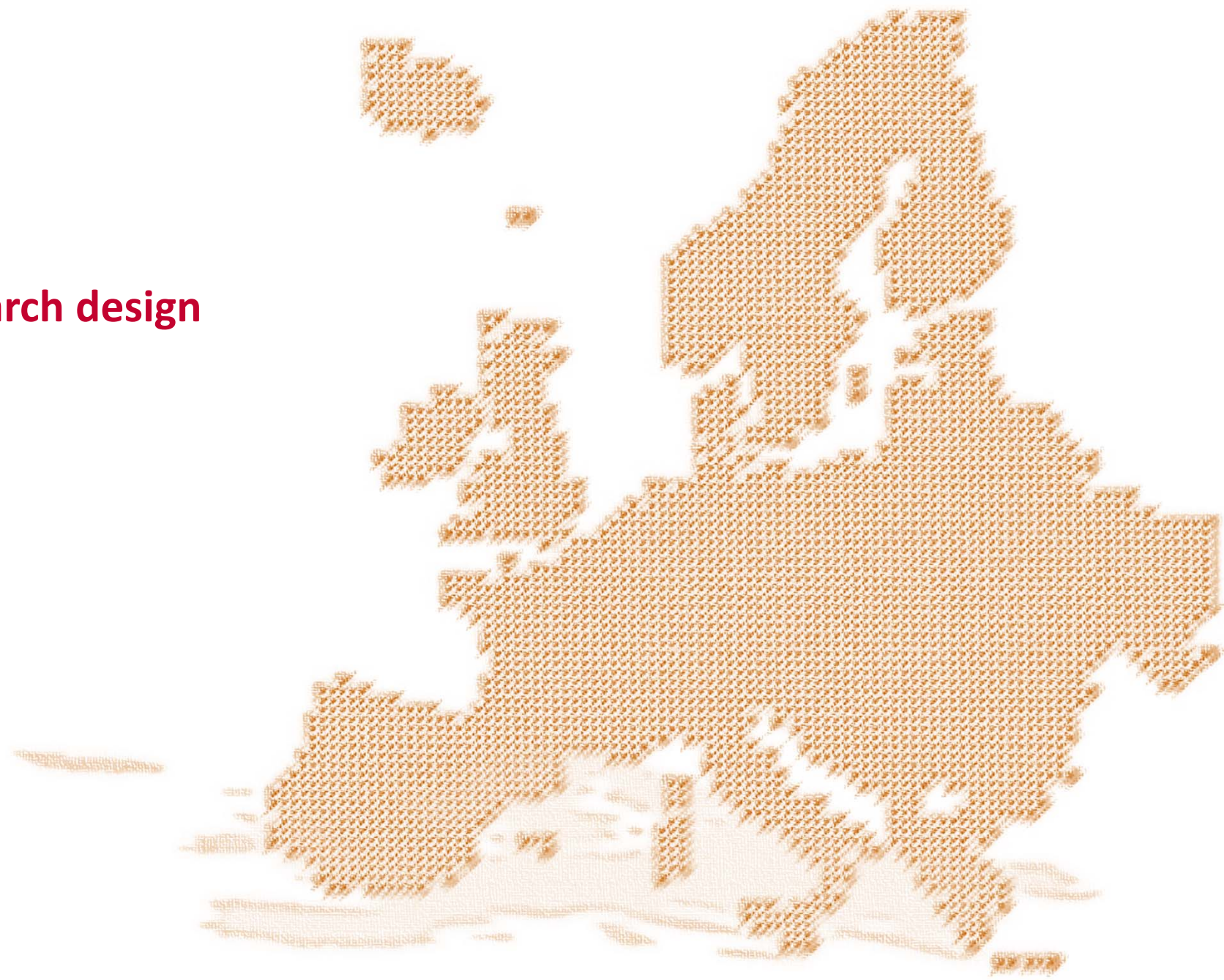
Research design

The European Communication Monitor (ECM) 2016 explores current practices and future developments of strategic communication in companies, non-profits and other organisations including communication agencies. It is the tenth edition of a survey that has been conducted annually since 2007 and is complemented by bi-annual surveys in other regions (Latin America, Asia-Pacific). The communication monitor series is known as the most comprehensive research in the field worldwide. It is the only global study which adheres to full standards of empirical research and provides transparency about its sampling procedures and respondents.

A joint study by academia and practice, the ECM is organised by the European Public Relations Education and Research Association (EUPRERA) and the European Association of Communication Directors (EACD), supported by partner PRIME Research, a global leader for media insights, and media partner Communication Director magazine. The study is led by Ansgar Zerfass and co-authored by Piet Verhoeven, Angeles Moreno, Ralph Tench and Dejan Verčič – all of them are renowned university professors representing different country contexts. A wider board of professors and national research collaborators ensure that the survey reflects the diversity of the field across Europe.

The ECM 2016 is based on responses from 2,710 communication professionals based in 43 European countries. They have answered a questionnaire which collects a large number of independent and dependent variables: personal characteristics of communication professionals (demographics, education, job status, experience); features of the organisation (structure, country); attributes of the communication department; the current situation regarding the professional and his/her organisation, as well as perceptions on developments in the field. The questions and the research framework have been derived from previous empirical studies and literature.

The study explores four constructs. Firstly, developments and dynamics in the field of strategic communication (Hallahan et al., 2007) are identified by longitudinal comparisons of strategic issues, communication channels and personnel development needs or opportunities. To this end, questions from previous ECM surveys (Zerfass et al., 2015, 2014, 2013, 2012, 2011, 2010, 2009, 2008, 2007) have been repeated. Secondly, regional and national differences are revealed by breaking down the results of this study to twenty key countries and by comparing results from Europe to those from other continents (Moreno et al., 2015; Macnamara et al., 2015).

Thirdly, a selection of current challenges in the field are empirically tested. The ECM 2016 explores the relevance, understanding and implementation of big data (Gandomi & Haider, 2015), algorithms in communications (Collister, 2015; Phillips, 2015), practices of communication with a specific focus on coaching and advising (Van Ruler & Verčič, 2005; Zerfass & Franke, 2013), stakeholder engagement (Kang, 2014), social media influencers (Freberg et al., 2011), as well as skills, knowledge and competency development for communication professionals (Tench & Moreno, 2015). Fourthly, statistical methods are used to identify high performing communication departments in the sample (Verčič & Zerfass, 2015), and there define which aspects make a difference. Overall, the research design supports a broad range of evaluations and interpretations which expand the body of knowledge.

Methodology and demographics

Methology and demographics

The online questionnaire used for the European Communication Monitor 2016 consisted of 32 questions arranged in 14 sections. Five questions were only presented to professionals working in communication departments. Instruments used dichotomous, nominal and ordinal response scales. They were based on research questions and hypotheses derived from previous research and literature. The survey used the English language and was pre-tested with 40 communication professionals in 15 European countries. Amendments were made where appropriate and the final questionnaire was activated for five weeks in March 2016. More than 40,000 professionals throughout Europe were invited with personal e-mails based on a database provided by the European Association of Communication Directors (EACD). Additional invitations were sent via national research collaborators and professional associations.

6,902 respondents started the survey and 3,287 of them completed it. Answers from participants who could not clearly be identified as part of the population were deleted from the dataset. This strict selection of respondents is a distinct feature of the ECM and sets it apart from many studies which are based on snowball sampling or which include students, academics and people outside of the focused profession or region. The evaluation is then based on 2,710 fully completed replies by communication professionals in Europe.

The Statistical Package for the Social Sciences (SPSS) was used for data analysis. Cluster analyses were used for classifying subjects. Results have been tested for statistical significance with, depending on the variable, Chi^2, Pearson Correlation, ANOVA/Scheffe Post-hoc, Kendall rank independent samples T, and Kendall rank correlation tests. Statistical indicators (Cramer's V, F, r, Tau) are reported in the footnotes. Moreover, results are marked as significant ($p \leq 0.05$) * or highly significant ($p \leq 0.01$) ** in the graphics or tables.

The demographics show that seven out of ten respondents are communication leaders: 37.2 per cent hold a top hierarchical position as head of communication or as CEO of a communication consultancy; 32.1 per cent are unit leaders or in charge of a single communica-tion discipline in an organisation. 59.9 per cent of the professionals interviewed have more than ten years of experience in communication management. 58.1 per cent of them are female and the average age is 41.6 years. A vast majority (94.5 per cent) in the sample has an academic degree, and more than two thirds hold a graduate degree or even a doctorate. Three out of five respondents work in communi-cation departments in organisations (joint stock companies, 19.5 per cent; private companies, 17.9 per cent; government-owned, public sector, political organisations, 13.1 per cent; non-profit organisations, associations, 11.9 per cent), while 37.5 per cent are communication consultants working freelance or for agencies.

Professionals from 43 countries participated in the survey. The dataset provided more detailed insights for 20 countries, including all key markets in Europe. Most respondents (30.0 per cent) are based in Northern Europe (countries like Norway, Sweden, United Kingdom), followed by Western Europe (29.6 per cent; countries like Germany, Switzerland, Netherlands, France), Southern Europe (27.0 per cent; countries like Spain, Italy, Croatia) and Eastern Europe (13.5 per cent; countries like Romania, Ukraine, Poland, Russia). The universe of 50 countries in Europe used for this study and the distinction of geographic regions is based on the official list of European Countries by the European Union (2016) and the Columbia Encyclopedia (2016).

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Research framework and questions

Person (Communication professional)			
Demographics	Education	Job status	Experience
Age, Q 26 Gender, Q 27 Membership in association(s), Q 30	Academic qualifications, Q 29	Position and hierarchy level, Q 19 Dominant areas of work, Q 25	Overall job experience (years), Q 28

Organisation	
Structure	Country
Type of organisation, Q 18 Alignment of the CCO / top communication manager, Q 20	European country, Q 31

Communication department	
Excellence	
Influence	Performance
Advisory influence, Q 21 Executive influence, Q 22	Success, Q 23 Quality and ability, Q 24

Situation	
Attention given to the debate about big data, Q 1 Big data activities in the organisation, Q 3 Use of big data analytics, Q 6 Use of algorithms and automated PR, Q 6 Time spent for various fields of communication practice, Q 7 Activities to support executives and other staff, Q 8	Dealing with social media influencers, Q 13 Social media skills and knowledge, Q 15 Management skills and knowledge, Q 16 Training programs offered/facilitated by the organisation, Q 17 Annual salary, Q 32

Perception	
Influence of big data on the PR profession, Q 1 Understanding of big data, Q 2 Challenges of big data, Q 5 Relevance of algorithms and automated PR, Q 6 Strategic issues, Q 9 Understanding of engagement, Q 10	Identifying stakeholder engagement, Q 11 Importance of communication channels and instruments, Q 12 Importance of social media influencers, Q 13 Identifying social media influencers, Q 14 Needs for personal development, Q 17

Demographic background of participants

Position

Head of communication, agency CEO	37.2%
Responsible for single communication discipline, unit leader	32.1%
Team member, consultant	24.9%
Other	5.8%

Organisation

Communication department		
▪ joint stock company	19.5%	
▪ private company	17.9%	
▪ government-owned, public sector, political organisation	13.1%	62.5%
▪ non-profit organisation, association	11.9%	
Communication consultancy, PR agency, freelance consultant		37.5%

Job experience

More than 10 years	59.9%
6 to 10 years	22.9%
Up to 5 years	17.3%

Alignment of the communication function

Strongly aligned communication department	26.6%
Aligned communication department	57.6%
Weakly aligned communication department	15.8%

13

Personal background of respondents

Gender / Age

	Overall	Head of communication, Agency CEO	Team leader, Unit leader	Team member, Consultant
Female	58.1%	50.7%	55.2%	69.4%
Male	41.9%	49.3%	44.8%	30.6%
Age (on average)	41.6 yrs	45.6 yrs	41.0 yrs	35.8 yrs

Membership in a professional association

EACD	10.6%
Other international communication association	12.1%
National PR or communication association	48.3%

Highest academic educational qualification*

Doctorate (Ph.D., Dr.)	6.3%
Master (M.A., M.Sc., Mag., M.B.A.), Diploma	62.6%
Bachelor (B.A., B.Sc.)	25.6%

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,710 PR professionals. Q 19: What is your position? Q 26: How old are you? Q 27: What is your gender? Q 29: Please state the highest academic/educational qualifications you hold. * No academic degree = 5.5%. Q 30: Are you a member of a professional organisation? Highly significant correlations between gender (Q 27) and position (Q 19) (chi-square test, $p \leq 0.01$, Cramér's V = 0.153).

Countries and regions represented in the study

Respondents are based in 43 European countries and four regions

Northern Europe 30.0% (n = 812)	Western Europe 29.6% (n = 802)	Eastern Europe 13.5% (n = 365)	Southern Europe 27.0% (n = 731)
Denmark Estonia Finland Iceland Ireland Latvia Lithuania Norway Sweden United Kingdom	Austria Belgium France Germany Liechtenstein Luxembourg Netherlands Switzerland	Armenia Belarus Bulgaria Czech Republic Georgia Hungary Poland Romania Russia Slovakia Ukraine	Albania Bosnia and Herzegovina Croatia Cyprus Greece Italy Macedonia Malta Montenegro Portugal Serbia Slovenia Spain Turkey

Big data in strategic communication

Chapter overview

Today's societies are transformed by the massive amount of data collected by organisations, intermediaries, technology firms and platform providers: "Data is the oil of the information economy" (Mayer-Schönberger & Cukier, 2013: 16). However, the discussion about big data – how to acquire and use data from various sources to inform decision-making and deliver better products or services – has only very recently entered the realm of public relations and strategic communication (Weiner & Kochar, 2016). A literature review shows that academia has not touched the topic at all. Professionals, on the other hand, need to be aware of the opportunities and challenges for their organisations. Big data might change their jobs dramatically, as "digitization and big data analytics (…) impact employment amongst knowledge workers – just as automation did for manufacturing workers" (Loebbecke & Picot, 2015: 149).
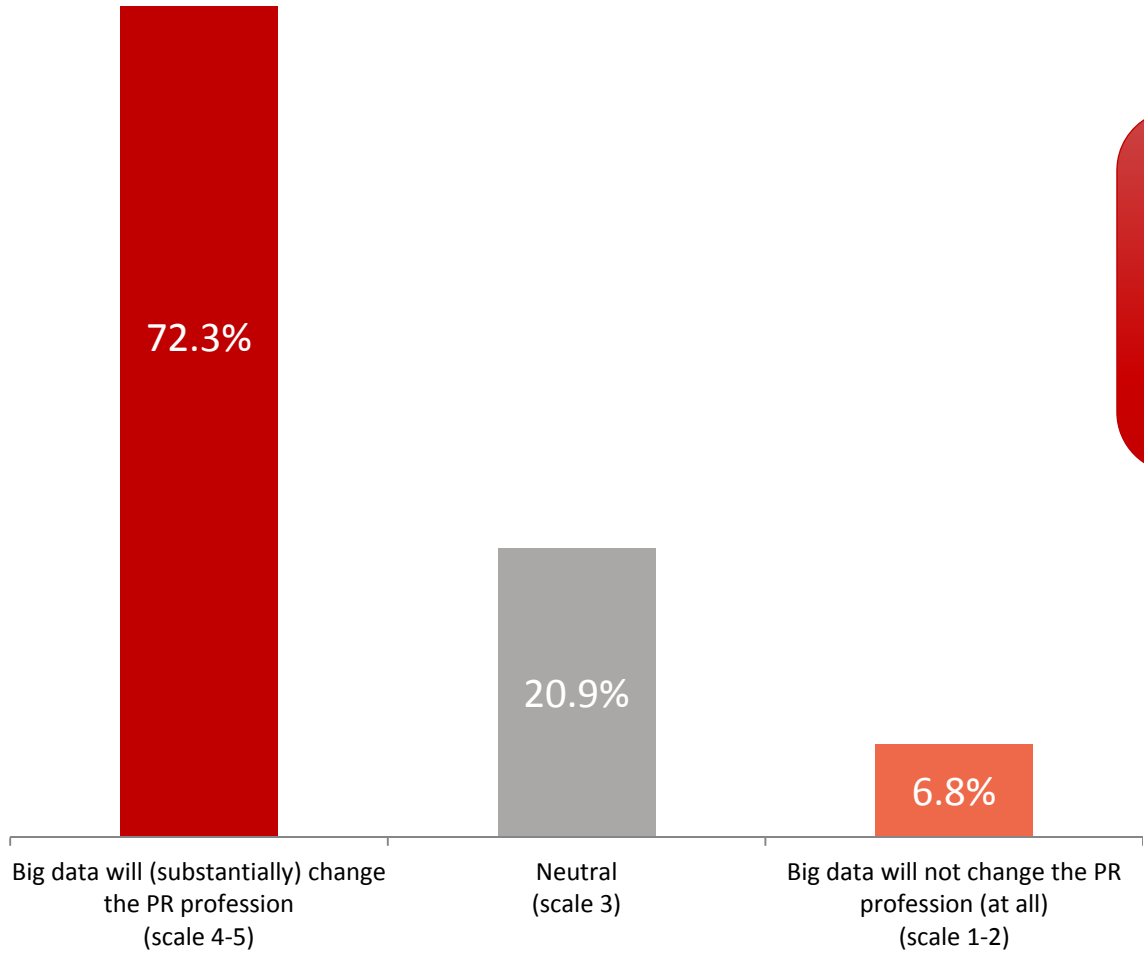
This study reveals that three out of four communication professionals in Europe (72.3 per cent) indeed believe that big data will change their profession. Almost one quarter (23.4 per cent) states that this is one of the most important issues for communication management in the near future. Nevertheless, only 59.3 per cent of the respondents have given close attention or attention to the debate about big data. Probably because of this, only a minority showed a comprehensive understanding when they were asked to rate various definitions representing different characteristics of big data.

Following this exercise, the questionnaire then offered a full definition of big data including the scale of data (volume), its different forms (variety), constant flow and processing (velocity) and uncertainty (veracity) (Chen et al., 2012; Gandomi & Haider, 2015; Schroeck et al., 2012). Based on this understanding, only 21.2 per cent of communication departments and agencies have implemented big data activities until now. Another 16.8 per cent are planning to do so until the end of 2017. Not surprisingly, joint stock companies and agencies are leading the movement, while governmental organisations and non-profits are significantly lagging behind. 55.3 per cent of the organisations who have implemented big data activities in communication use analytics for planning purposes, e.g. to inform future campaigns. Less rely on big data for communication measurement (45.9 per cent) or for guiding day-to-day actions, e.g. by automatically generating content for specific publics (36.5 per cent).

What are the reasons for the limited penetration of big data in the field of strategic communication? On the one hand, the communication profession lacks analytical skills to make sense of big data and time to study such data. These limitations were confirmed by nearly half of the respondents. Moreover, statistical analyses confirmed that there is a highly significant correlation between the knowledge and awareness of big data among communication professionals and big data activities of their organisations. However, only 54.7 per cent of the practitioners can be classified as informed, based on a cluster analysis of all respondents. They give attention to the big data discourse and have a lot of knowledge in the field. 17.0 per cent, on the other hand, are pretenders – they pay attention, but they lack knowledge. The rest (28.2 per cent) are either bystanders or even clueless about big data.

Ironically, an alarming lack of skills and knowledge hinders public relations and communication professionals – who tend to define themselves as information experts – from profiting from the massive amount of structured and unstructured data available for public communication today.

A majority of communicators believe that big data will change their profession

72.3%

20.9%

6.8%

Big data will (substantially) change the PR profession (scale 4-5)

Neutral (scale 3)

Big data will not change the PR profession (at all) (scale 1-2)

23.4% of practitioners in Europe rate "using big data and/or algorithms for communication" as one of the three most important issues for communication management until 2018

Three out of of five communication practitioners follow the debate on big data

Have given (close) attention (scale 4-5)	Neutral (scale 3)	Have not given attention (at all) (scale 1-2)
59.3%	16.3%	24.4%

How communication professionals define big data

	Correct definitions		Wrong definitions
	Big data refers to …		*Big data refers to …*

	Correct definitions		Wrong definitions
74%	mass quantities of stored data that provide new insights which were previously not available	**55%**	interpretation of relevant data for strategic decision making
56%	a variety of multiple data types from internal and external sources	**32%**	all kinds of information which is available in real-time
37%	a fast stream of data (data in motion) and their constant processing	**27%**	a multitude of information from social media
28%	high and low quality data from trusted and untrusted sources	**25%**	customised creation of content for different stakeholders

Many practitioners lack a comprehensive understanding of big data

Category	Value
All items correctly classified (highly developed)	0.9%
7 of 8 items correctly classified (developed)	6.2%
6 of 8 items correctly classified (developed)	15.4%
5 of 8 items correctly classified (moderate developed)	30.7%
4 of 8 items correctly classified (somehow developed)	23.6%
3 of 8 items correctly classified (less developed)	15.8%
2 of 8 items correctly classified (not developed)	4.5%
1 of 8 items correctly classified (not developed)	1.1%
No items correctly classified (not at all developed)	1.8%

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,710 PR professionals. Q 2: "Big data" is characterised in various ways. Please pick all definitions which you believe are most appropriate. Development of big data understanding among practitioners based on the correct classification of items/definitions: all items are correctly identified when the four correct definitions have been selected and the four wrong definitions have not been selected, etc.

Definition of big data

"Big data" is mostly described as
huge volumes and streams of different forms of data
from diverse sources (external and internal) and their
constant processing, which provides new insights.

- Scale of data
- Different forms of data

Volume | Variety

Velocity | Veracity

- Analysis of streaming data
- Uncertainty of data

Definition shown to respondents based on Gandomi & Haider, 2015; Schroeck et al., 2012.
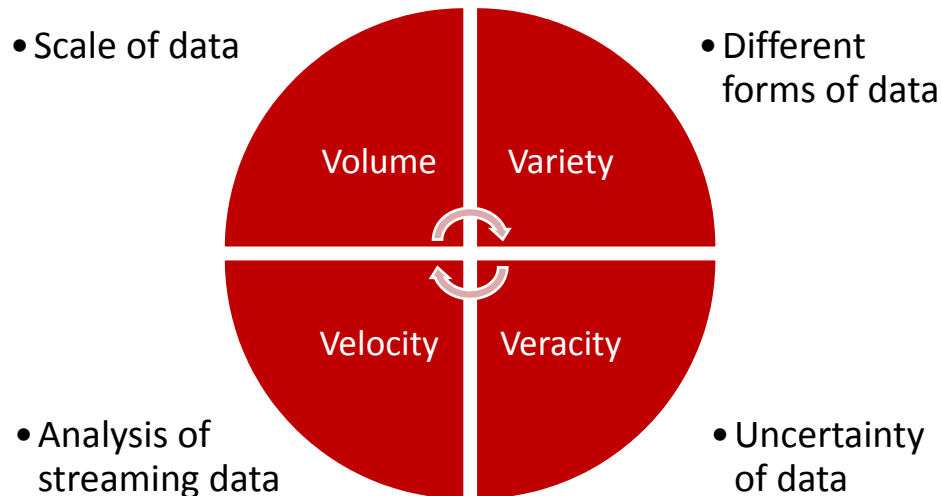
Communication departments as well as agencies are consulting (internal) clients and colleagues in the field of big data
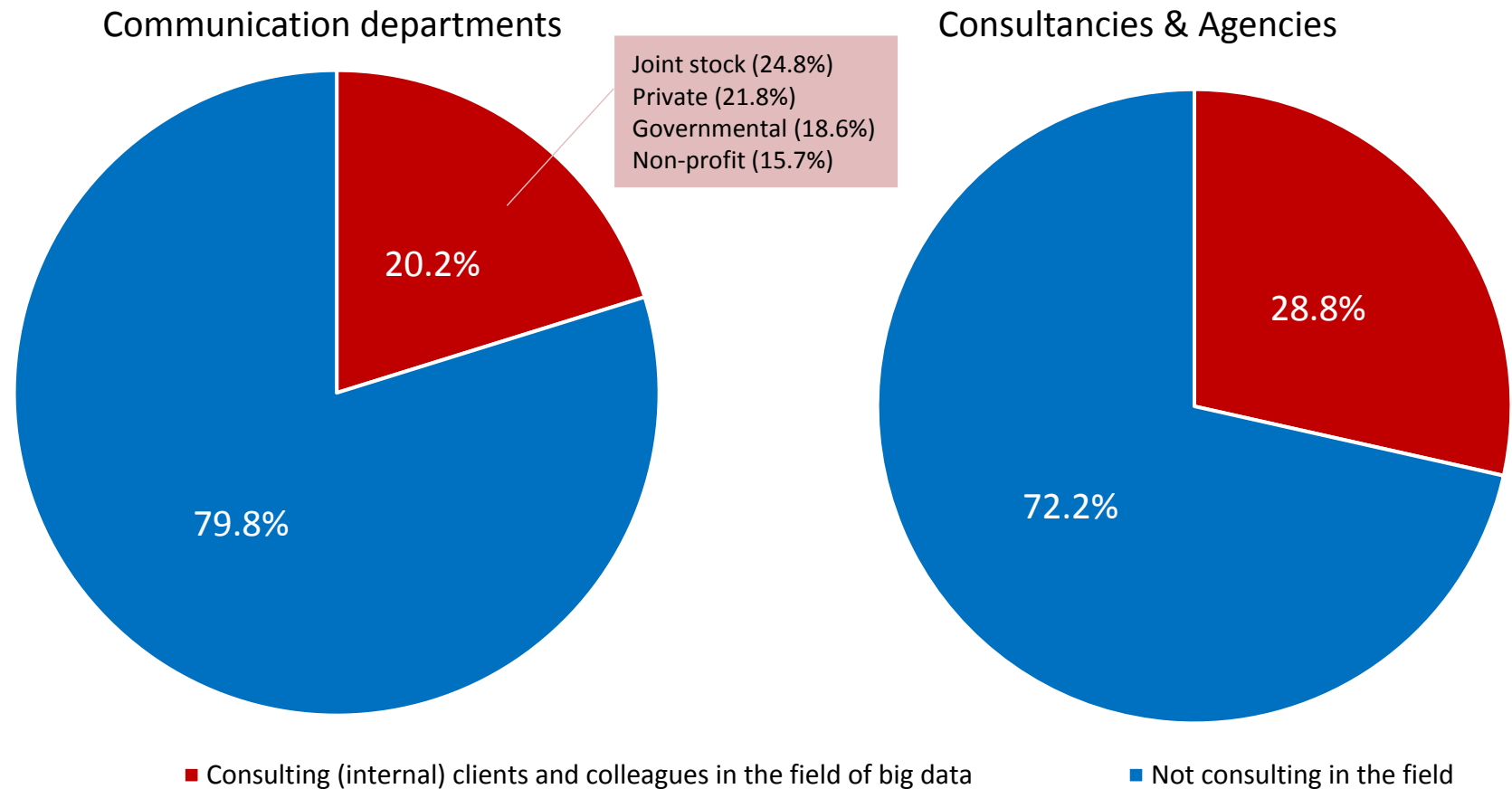
Communication departments

20.2%

79.8%

Joint stock (24.8%)
Private (21.8%)
Governmental (18.6%)
Non-profit (15.7%)

Consultancies & Agencies

28.8%

72.2%

■ Consulting (internal) clients and colleagues in the field of big data   ■ Not consulting in the field

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,505 PR professionals. Q 3: "Big data" is mostly described as huge volumes and streams of different forms of data from diverse sources (external and internal) and their constant processing, which provide new insights. Taking into account this definition, my communication department/agency … Item: consults (internal) clients and colleagues in the field of big data.

Only a minority of European organisations has implemented big data activities

My communication department/agency …
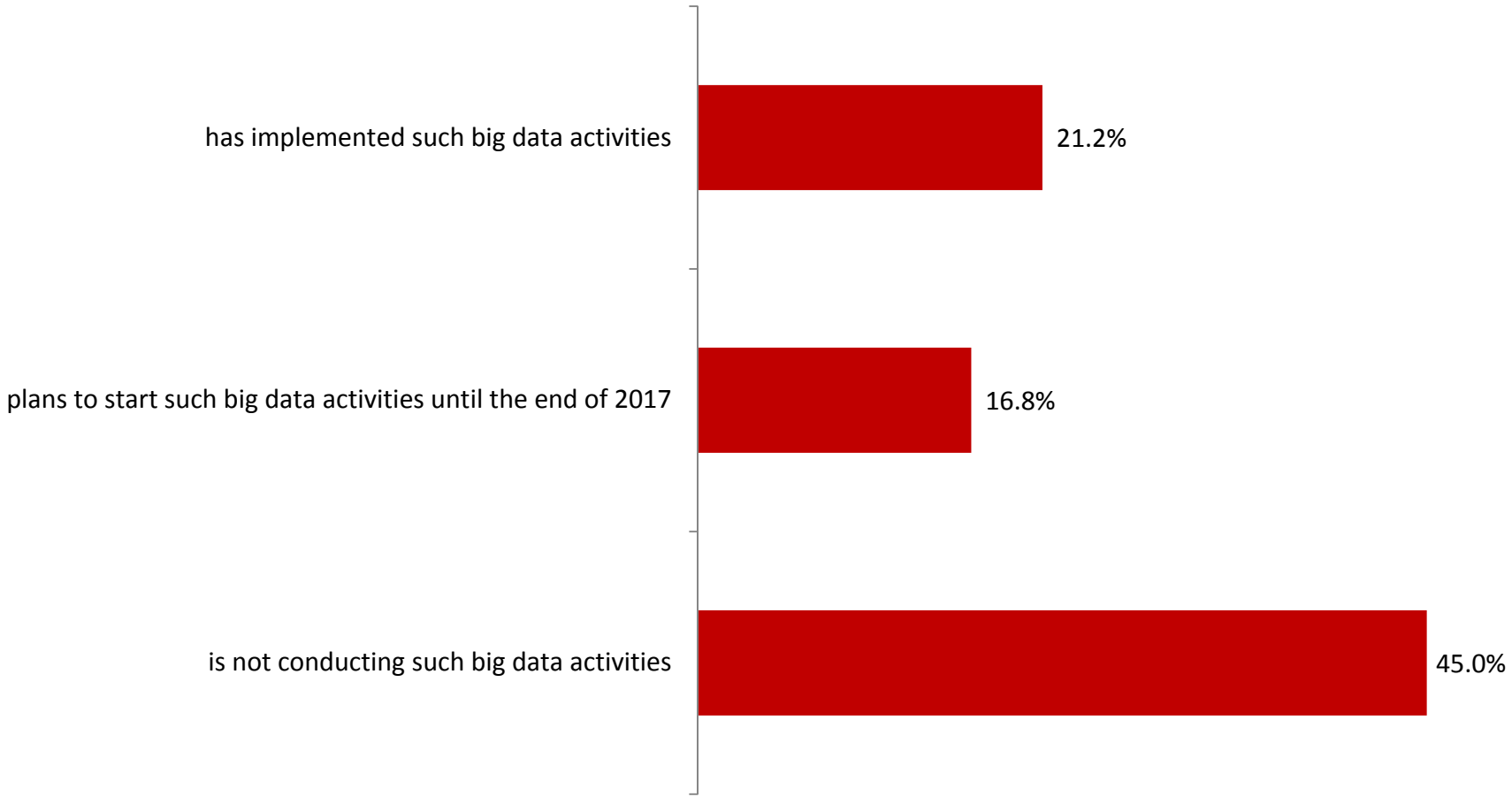
has implemented such big data activities — 21.2%

plans to start such big data activities until the end of 2017 — 16.8%

is not conducting such big data activities — 45.0%

Governmental and non-profit organisations are lagging behind

My communication department/agency …
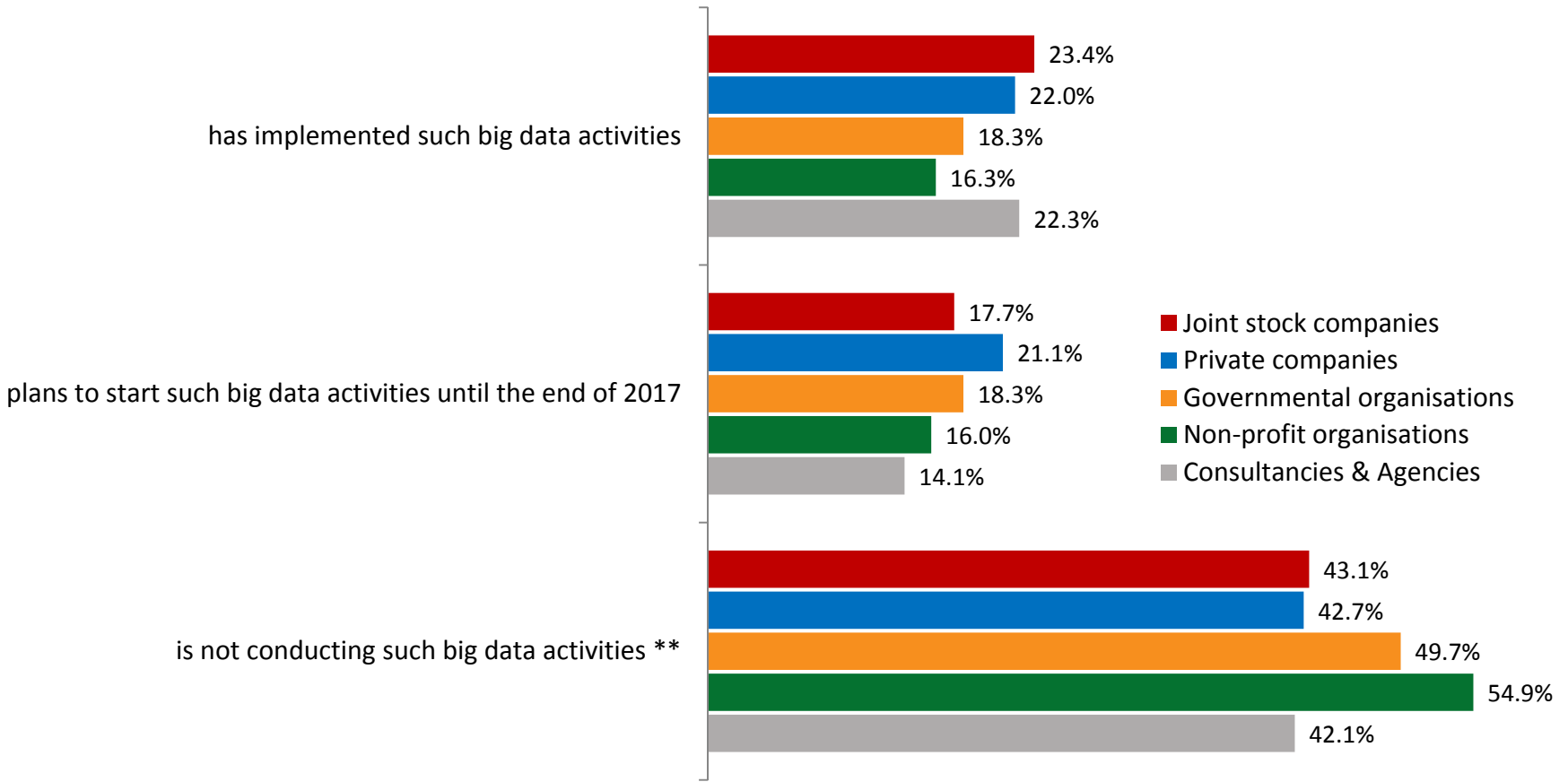
has implemented such big data activities
- Joint stock companies: 23.4%
- Private companies: 22.0%
- Governmental organisations: 18.3%
- Non-profit organisations: 16.3%
- Consultancies & Agencies: 22.3%

plans to start such big data activities until the end of 2017
- Joint stock companies: 17.7%
- Private companies: 21.1%
- Governmental organisations: 18.3%
- Non-profit organisations: 16.0%
- Consultancies & Agencies: 14.1%

is not conducting such big data activities **
- Joint stock companies: 43.1%
- Private companies: 42.7%
- Governmental organisations: 49.7%
- Non-profit organisations: 54.9%
- Consultancies & Agencies: 42.1%

Legend:
- Joint stock companies
- Private companies
- Governmental organisations
- Non-profit organisations
- Consultancies & Agencies

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,505 PR professionals. Q 3: "Big data" is mostly described as huge volumes and streams of different forms of data from diverse sources (external and internal) and their constant processing, which provide new insights. Taking into account this definition, my communication department/agency … . ** Highly significant differences (chi-square test, p ≤ 0.01).

Implementation of big data activities across Europe
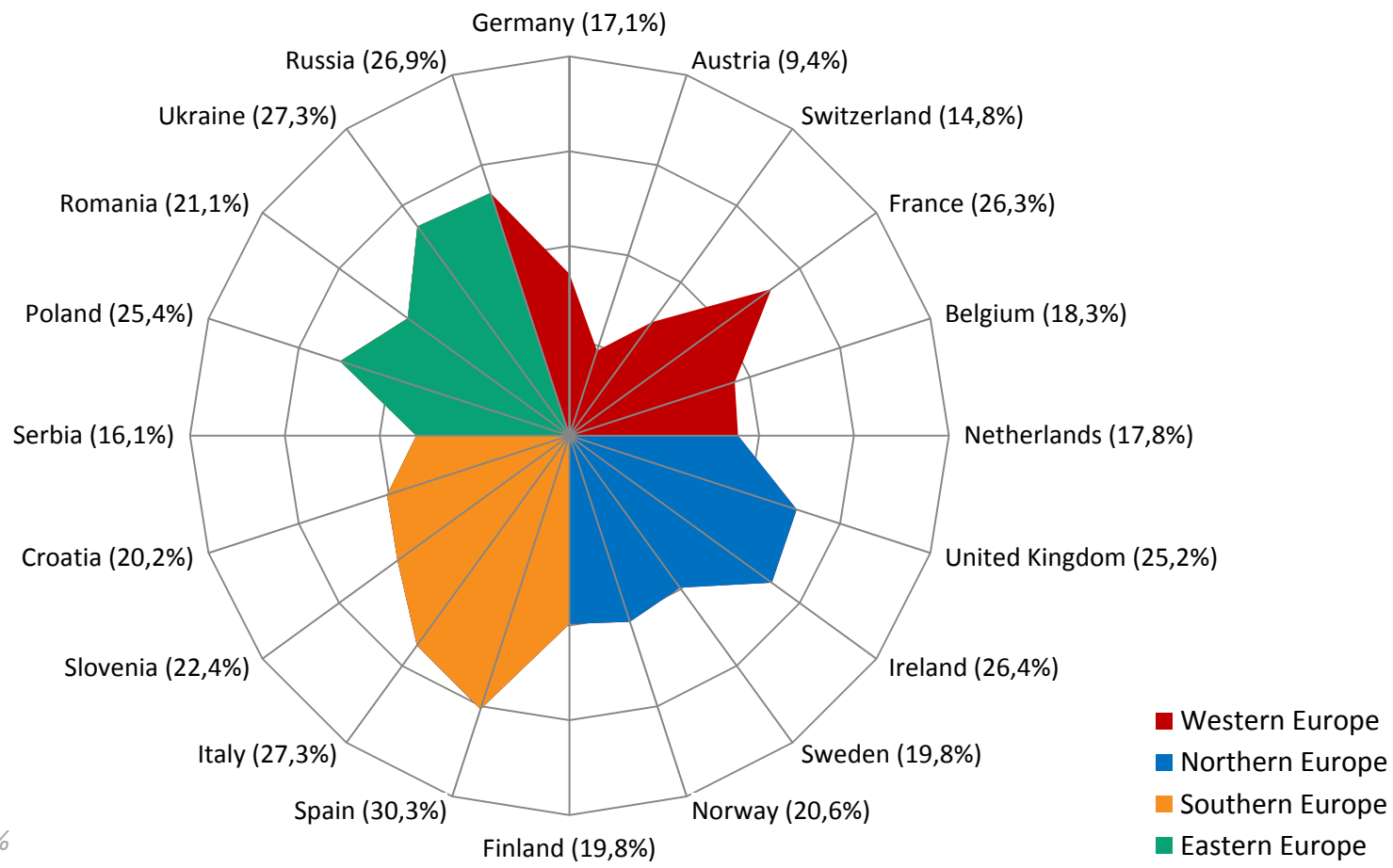
Germany (17,1%)
Austria (9,4%)
Russia (26,9%)
Switzerland (14,8%)
Ukraine (27,3%)
France (26,3%)
Romania (21,1%)
Belgium (18,3%)
Poland (25,4%)
Netherlands (17,8%)
Serbia (16,1%)
United Kingdom (25,2%)
Croatia (20,2%)
Ireland (26,4%)
Slovenia (22,4%)
Sweden (19,8%)
Italy (27,3%)
Norway (20,6%)
Spain (30,3%)
Finland (19,8%)

Scale
0.0% – 40.0%

- ■ Western Europe
- ■ Northern Europe
- ■ Southern Europe
- ■ Eastern Europe

Big data analytics are mainly used to plan overall strategies and justify activities
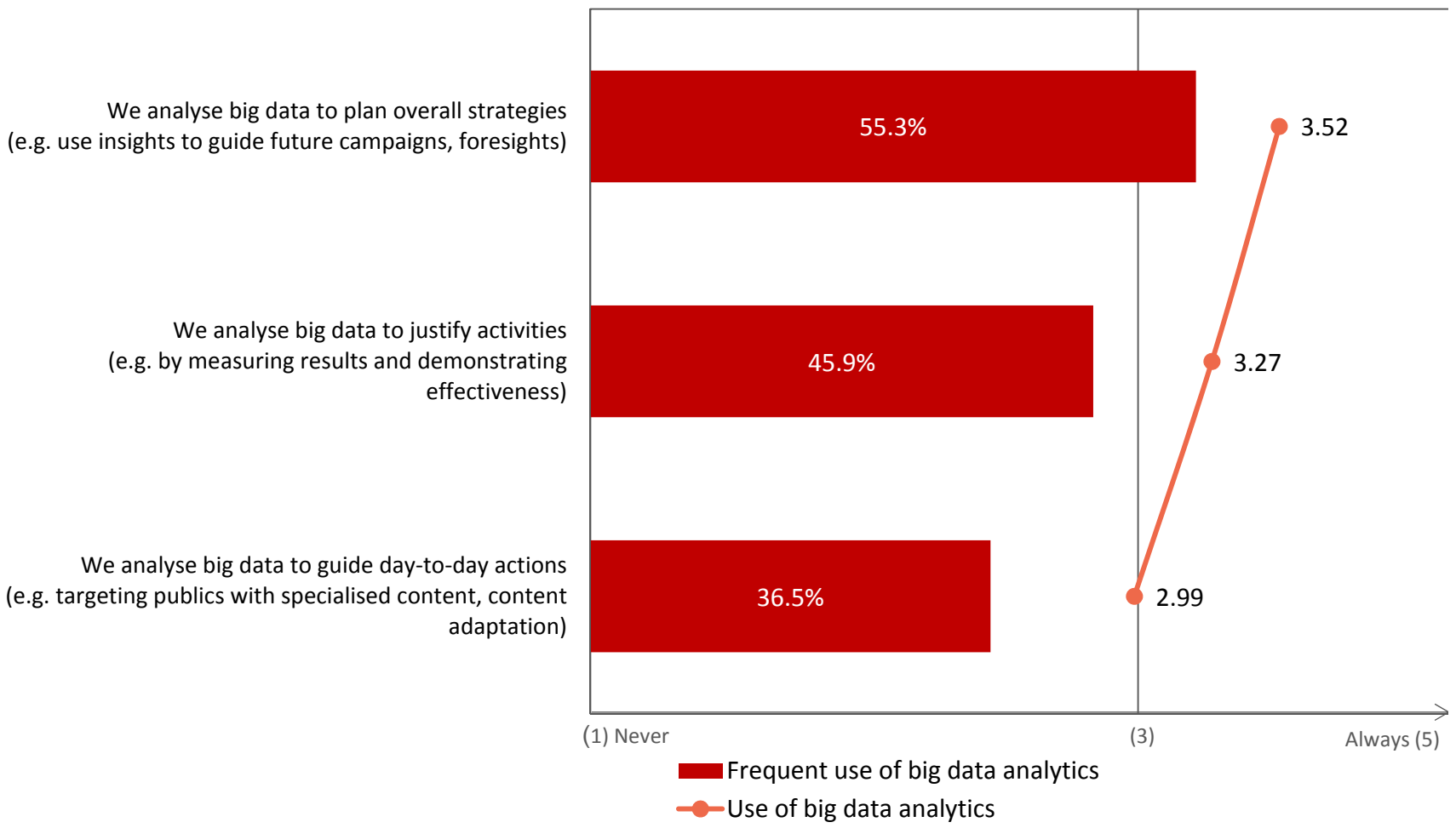
We analyse big data to plan overall strategies
(e.g. use insights to guide future campaigns, foresights) — 55.3% — 3.52

We analyse big data to justify activities
(e.g. by measuring results and demonstrating effectiveness) — 45.9% — 3.27

We analyse big data to guide day-to-day actions
(e.g. targeting publics with specialised content, content adaptation) — 36.5% — 2.99

(1) Never   (3)   Always (5)

■ Frequent use of big data analytics
●— Use of big data analytics

Major challenges for the communication profession when working with big data

Challenge	Percentage
Lack of analytical skills (to make sense of big data)	48.6%
Lack of time to study/analyse big data	45.4%
Lack of technical skills (to handle big data)	36.6%
Data quality	31.1%
Lack of software solutions fitting communication needs	25.5%
Lack of budget	24.3%
Organisational barriers (e.g. a lack of cooperation between departments)	22.8%
Data security and risk management	22.1%
Lack of IT staff who can support	15.8%
Ethical concerns	14.1%
Legal restrictions	13.6%

Perception of challenges differs among age groups

Lack of analytical skills (to make sense of big data)
- 49.0%
- 53.1%
- 53.2%
- 45.0%
- 38.3%

Lack of time to study/analyse big data
- 44.2%
- 38.9%
- 45.7%
- 49.1%
- 43.9%

Lack of technical skills (to handle big data)
- 34.6%
- 33.4%
- 33.5%
- 39.0%
- 43.9%

Ethical concerns
- 17.3%
- 16.4%
- 14.5%
- 12.4%
- 13.5%

Legal restrictions
- 12.5%
- 17.3%
- 14.7%
- 11.8%
- 10.7%

Legend:
- 60 or older
- 50 - 59
- 40 - 49
- 30 - 39
- 29 or younger

29
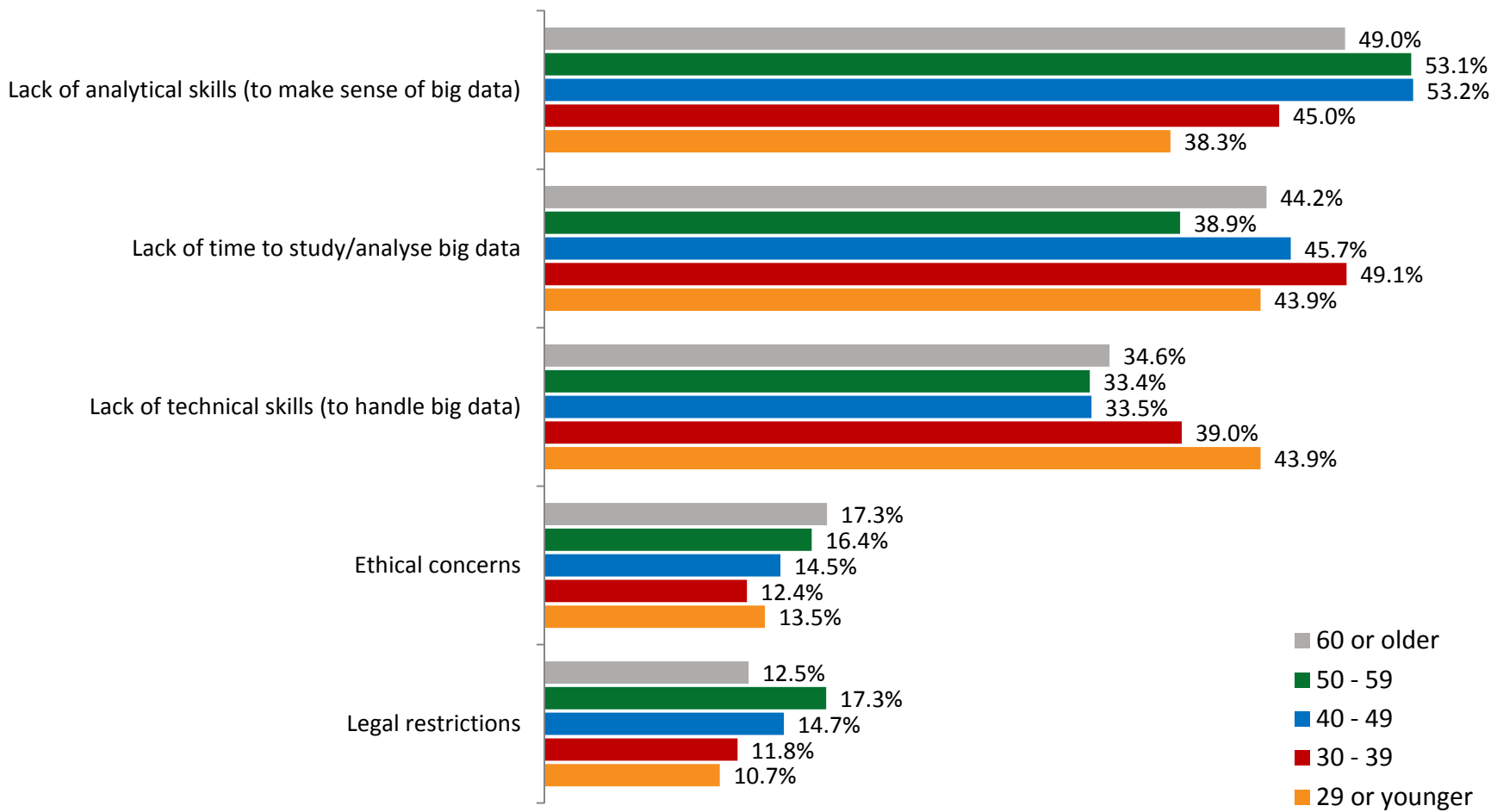
Types of communication professionals based on a cluster analysis (according to attention for and knowledge about big data)

A LOT OF KNOWLEDGE ABOUT BIG DATA

Bystanders
22.1%

Informed
54.7%

LITTLE ATTENTION TO BIG DATA DISCOURSE

A LOT OF ATTENTION TO BIG DATA DISCOURSE

Clueless
6.1%

Pretenders
17.0%

LITTLE KNOWLEDGE ABOUT BIG DATA

Big Data Clusters	Not developed knowledge (<3)	Less developed knowledge (3)	Somehow developed knowledge (4)	Moderate developed knowledge (5)	Developed knowledge (6)	Highly developed knowledge (>6)
No attention at all (1) No attention (2)	**Clueless**		**Bystanders**			
More or less (3) Little attention (4) Close attention (5)	**Pretenders**		**Informed**			

Most of the *pretenders* are working in consultancies and agencies; one third of professionals in governmental organisations are *bystanders*

	Informed	Bystanders	Pretenders	Clueless
Joint stock companies	55.0%	22.7%	18.0%	4.3%
Private companies	55.6%	21.4%	16.3%	6.8%
Governmental organisations	52.4%	29.0%	10.4%	8.2%
Non-profit organisations	52.3%	23.5%	16.1%	8.0%
Consultancies & Agencies	55.8%	19.3%	19.6%	5.4%
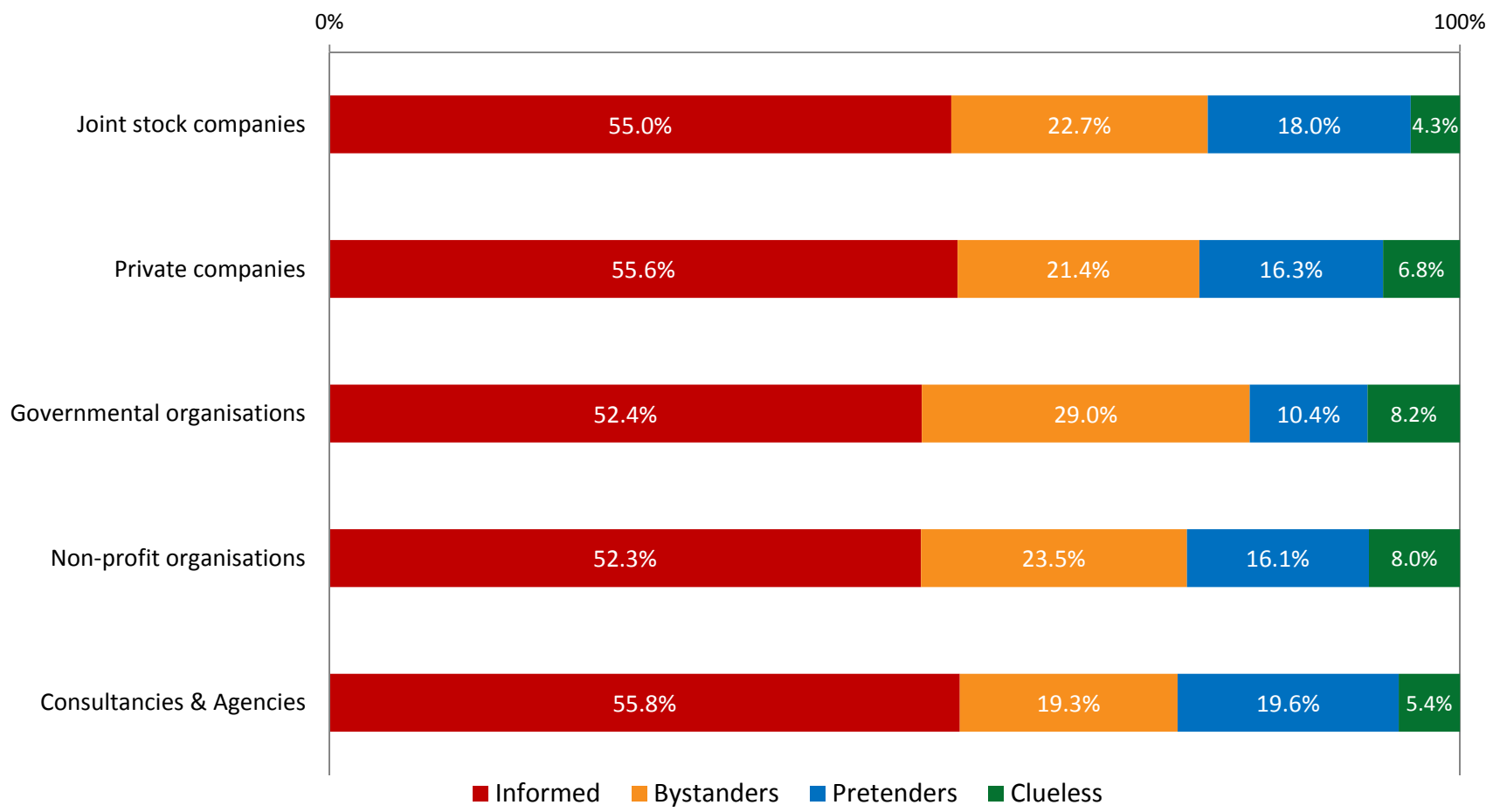
Communication professionals following the debate about big data rate its relevance for the field significantly higher than others

Legend:
- Big data will (substantially) change the PR profession (scale: 4-5)
- Neutral (scale: 3)
- Big data will not change the PR profession (at all) (scale: 1-2)

Chart data:

	Informed (4,07)	Pretenders (4,04)	Bystanders (3,32)	Clueless (3,22)
Big data will (substantially) change	84.0%	84.4%	44.4%	34.9%
Neutral	12.2%	11.9%	41.2%	50.6%
Big data will not change	3.8%	3.7%	14.4%	14.5%
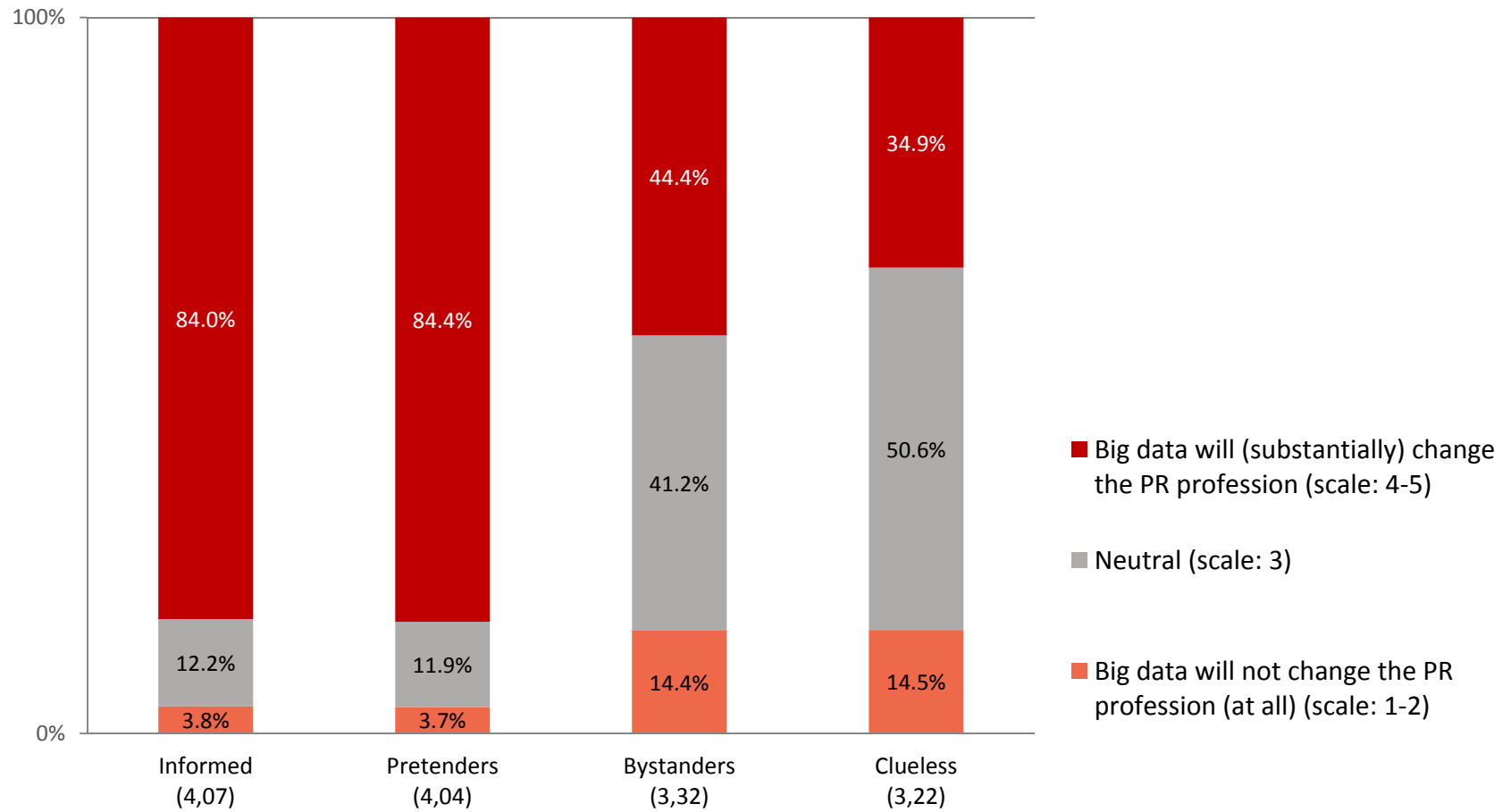
www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,710 PR professionals. Cluster analysis based on Q 1 (attention given to the debate on big data, ranging from no attention at all to close attention) and Q 2 (knowledge about big data definitions) identified four different groups of respondents.
Q 1: 'Big data' is a common topic for discussion together with the broader implications for society today. This discussion might also be relevant for strategic communication and public relations (PR). Please rate these statements based on your experience. Scale 1 (Big data will not change the PR profession at all) – 5 (Big data will substantially change the PR profession). Highly significant differences (ANOVA/Scheffe post-hoc test, $p \leq 0.01$, $F = 183.773$)

Significant correlations between the awareness/knowledge of professionals and the big data activities of their organisations

My communication department/agency …
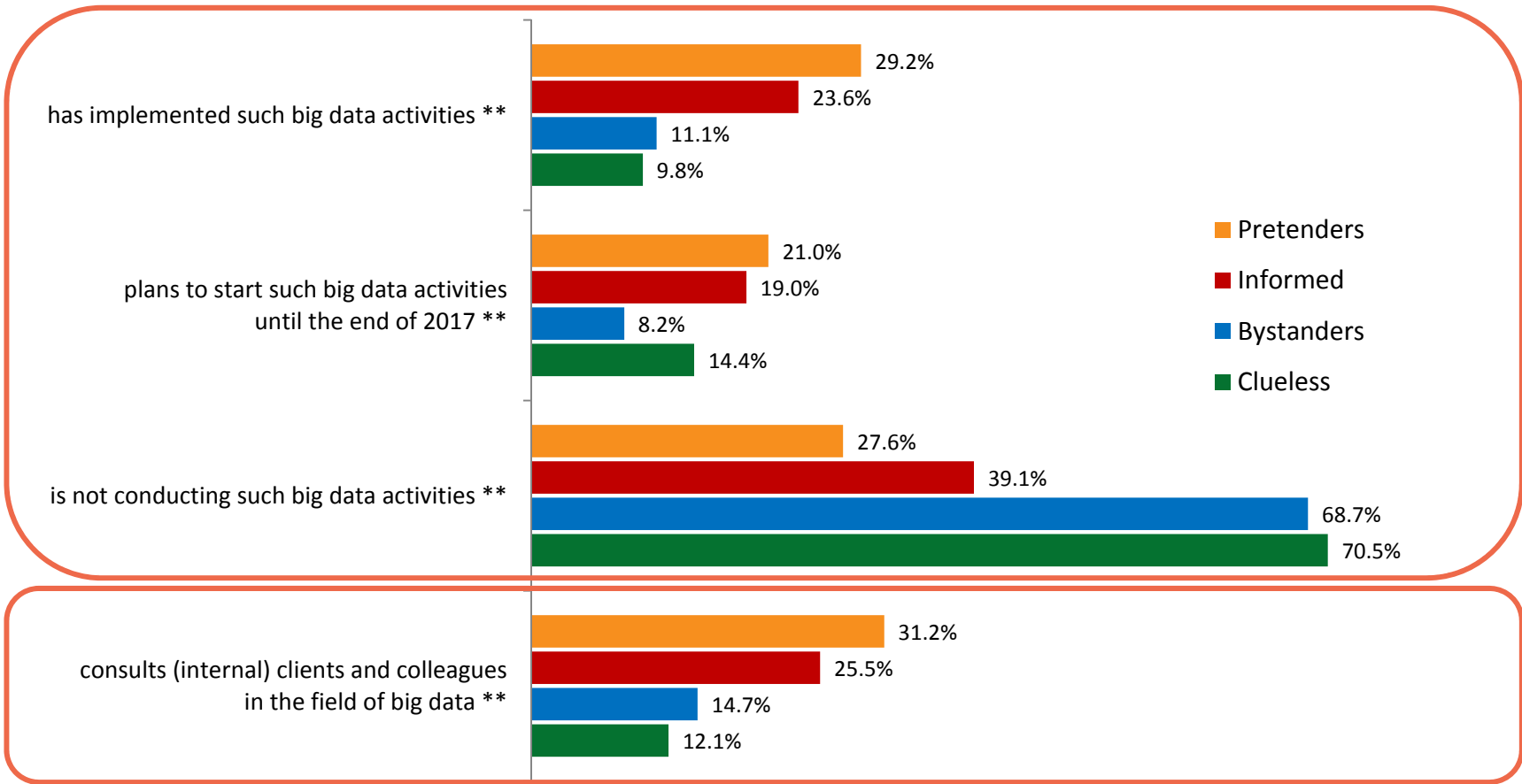
has implemented such big data activities **
- Pretenders: 29.2%
- Informed: 23.6%
- Bystanders: 11.1%
- Clueless: 9.8%

plans to start such big data activities until the end of 2017 **
- Pretenders: 21.0%
- Informed: 19.0%
- Bystanders: 8.2%
- Clueless: 14.4%

is not conducting such big data activities **
- Pretenders: 27.6%
- Informed: 39.1%
- Bystanders: 68.7%
- Clueless: 70.5%

consults (internal) clients and colleagues in the field of big data **
- Pretenders: 31.2%
- Informed: 25.5%
- Bystanders: 14.7%
- Clueless: 12.1%

Legend:
- Pretenders
- Informed
- Bystanders
- Clueless

33

**Automation in PR
and communication
management**
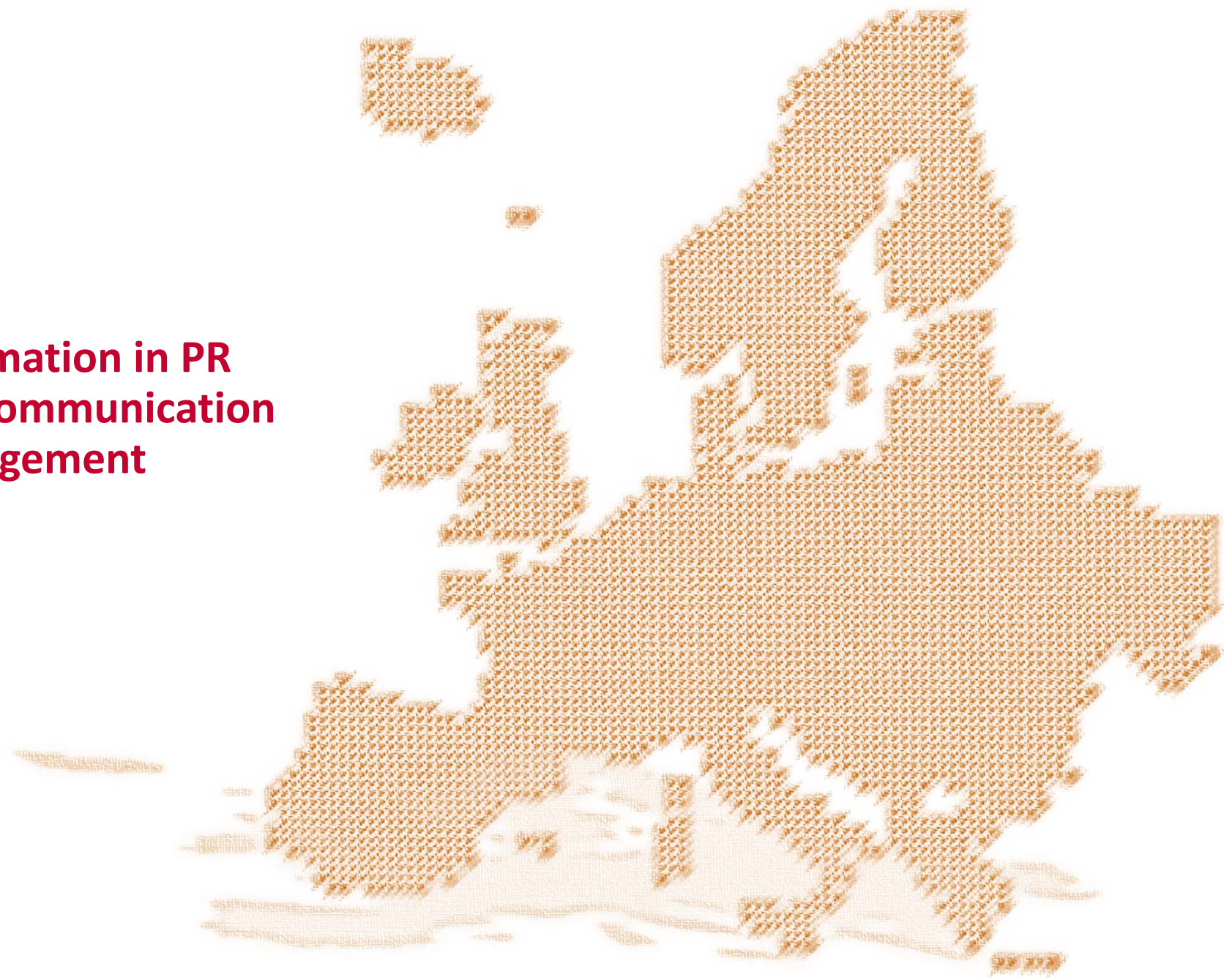
Chapter overview

Digital information and big data can be used for more than decision-making: it has "opened up the doors to real-time, inexpensive and large-scale testing of the effectiveness of persuasion" (Tufekci, 2014: 8) and for generating user-specific and situation-specific content. Search engines like Google and e-commerce platforms such as Amazon display advertisements and products based on previous search behaviour. Facebook uses auto-moderation functions to identify improper postings on brand pages, which has a direct impact on the public discourse in crisis situations (Collister, 2015: 364). Here, content production or suppression is not based on planning or creative ideas by communication professionals, but on algorithms.

Algorithms are traditionally understood as "an exact prescription, defining a computational process, leading from various initial data to the desired result" (Markov, 1954: 1) or "a set of rules that precisely defines a sequence of operations" (Stone 1972: 4). Modern algorithms are dynamic in a sense that they are able to adapt to multiple situations. As such, the outcome of an automated communication process, e.g. the content presented to a user in a specific situation on a particular device, is not known in advance, but generated in the course of the interaction. This spurs many questions about the opportunities and challenges of automated public relations (Phillips, 2015).

Empirical insights from the ECM show a large gap between the perceived importance and today's implementation of algorithms in strategic communication and public relations. Moreover, a passive and supportive use of algorithms is preferred. Three out of four respondents (75.0 per cent) agree that communication activities should be adapted to external algorithms of search engines or social media platforms. But only 29.2 per cent state that their communication department or agency uses such approaches. Both figures are surprisingly low, as search engine optimisation (SEO) (Gudivada et al., 2015) and content production aligned to the selection criteria of multipliers are nothing new at all. Two thirds of the communication professionals believe that algorithms are important to 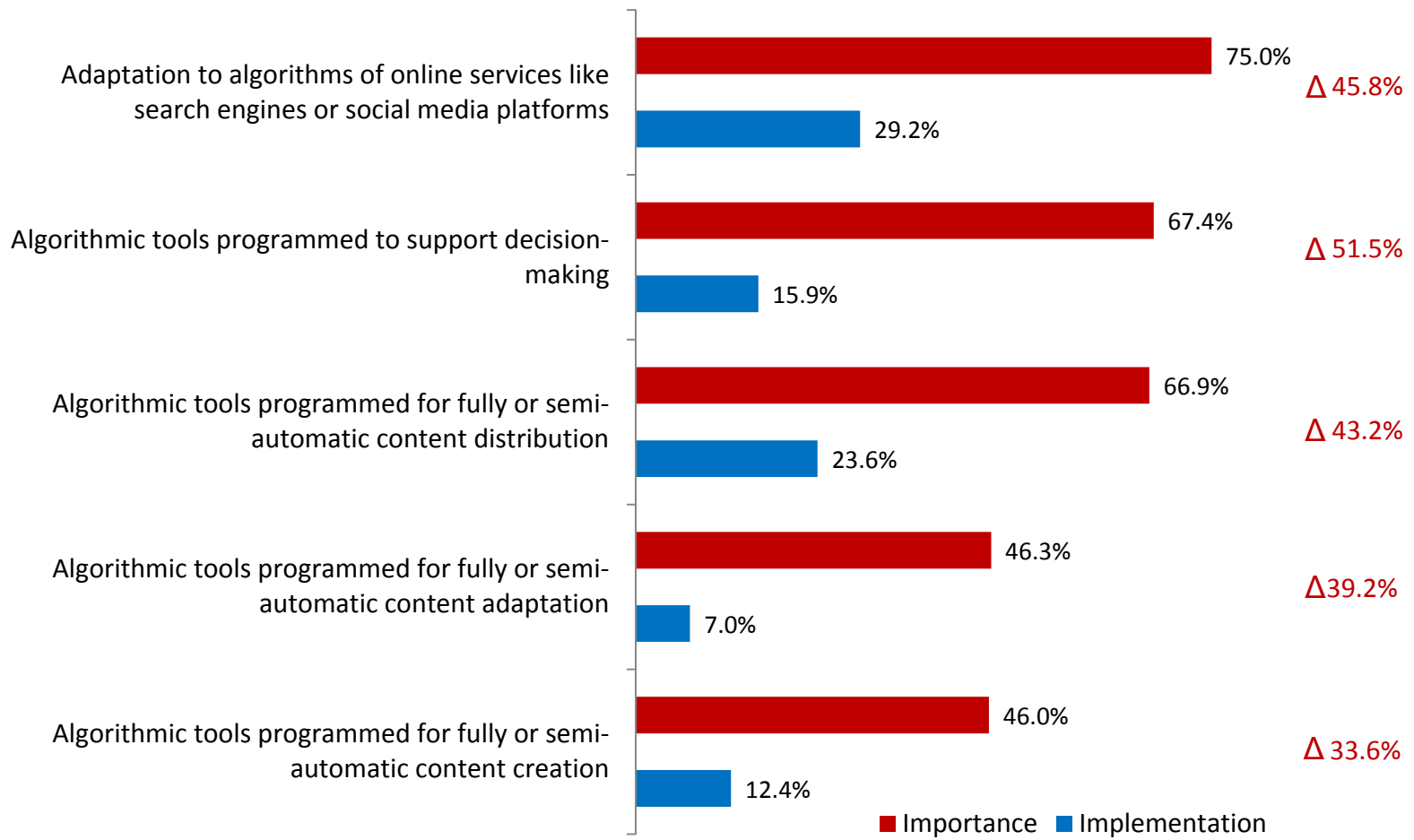support decision-making (67.4 per cent) or content distribution (66.9 per cent). Again, the implementation rates are much lower at 15.9 and 23.6 per cent. Interestingly, only a minority thinks that active applications of algorithms are important, e.g. for automatically adapting content (46.3 per cent) or creating content (46.0 per cent). Companies and agencies are leading the field when it comes to the implementation of such routines. There are also clear differences between key countries in Europe. A correlation analysis proves that organisations who have implemented big data analytics to guide day-to-day actions use algorithms of all kind more often than other organisations. Both trends – big data and algorithms – are clearly intertwined. The rising importance claimed for both might lead to a situation where we see more and more auto-communication. This might look promising at first glance, as it helps to be faster and more efficient.

But there are also inevitable risks. Multilateral stakeholder relations might be succeeded by nontransparent approaches of 'engineering' publics and consent (Tufekci, 2015; Bernays, 1923). On a broader scale, professional communication might lose its relevance if it is restricted to self-referential practices which create no overall value for organisations and society. This problem has been noted earlier by Christensen (1997) for marketing management. His metaphoric and critical use of the term 'auto-communication' deserves new attention in today's digital environment.

Importance and implementation of practices for automated communication

Practice	Importance	Implementation	Δ
Adaptation to algorithms of online services like search engines or social media platforms	75.0%	29.2%	Δ 45.8%
Algorithmic tools programmed to support decision-making	67.4%	15.9%	Δ 51.5%
Algorithmic tools programmed for fully or semi-automatic content distribution	66.9%	23.6%	Δ 43.2%
Algorithmic tools programmed for fully or semi-automatic content adaptation	46.3%	7.0%	Δ 39.2%
Algorithmic tools programmed for fully or semi-automatic content creation	46.0%	12.4%	Δ 33.6%

■ Importance ■ Implementation

www.communicationmonitor.eu / Zerfass et al. 2016 / n [min] = 2,298 PR professionals. Q 6: Search engines and social media platforms use algorithms to select and display content. Similar approaches might be used by organisations to automate their communication activities. In your opinion: To what extent are the following practices important for strategic communication today? And what is already used by your department/agency? Percentages: Frequency based on scale points 4-5.

Algorithmic tools are important for all kinds of organisations – but governmental organisations are less convinced

Adaptation to algorithms of online services like search engines or social media platforms

Algorithmic tools programmed to support decision-making *

Algorithmic tools programmed for fully or semi-automatic content distribution *

Algorithmic tools programmed for fully or semi-automatic content adaptation

Algorithmic tools programmed for fully or semi-automatic content creation

(1) Not at all important   (3)   Extremely important (5)

■ Companies   ▲ Governmental organisations   ● Non-profit organisations   ✳ Consultancies & Agencies

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,298 PR professionals. Q 6: Search engines and social media platforms use algorithms to select and display content. Similar approaches might be used by organisations to automate their communication activities. In your opinion: To what extent are the following practices important for strategic communication today? Mean values. * Significant differences (ANOVA/Scheffe post-hoc test, p ≤ 0.05).

Utilisation of automated communication in different types of organisations

Adaptation to algorithms of online services like search engines or social media platforms
- 26.0%
- 31.0%
- 29.4%
- 28.3%
- 30.3%

Algorithmic tools programmed to support decision-making
- 14.5%
- 16.8%
- 13.1%
- 13.4%
- 18.1%

Algorithmic tools programmed for fully or semi-automatic content distribution
- 21.8%
- 25.6%
- 25.2%
- 23.1%
- 23.4%

Algorithmic tools programmed for fully or semi-automatic content adaptation
- 7.2%
- 8.4%
- 4.5%
- 8.2%
- 6.8%

Algorithmic tools programmed for fully or semi-automatic content creation *
- 8.3%
- 12.5%
- 12.8%
- 14.7%
- 13.6%

- ■ Joint stock companies
- ■ Private companies
- ■ Governmental organisations
- ■ Non-profit organisations
- ■ Consultancies & Agencies

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,417 PR professionals. Q 6: Search engines and social media platforms use algorithms to select and display content. Similar approaches might be used by organisations to automate their communication activities. In your opinion: What is already used by your department/agency? Percentages: Frequency based on approval of utilisation. * Significant differences (chi-square test, p ≤ 0.05).

Perceived importance and usage of algorithms for strategic communication across different European countries

	Adaptation to algorithms of online services like search engines or social media platforms		Algorithmic tools programmed to support decision-making		Algorithmic tools programmed for fully or semi-automatic content distribution		Algorithmic tools programmed for fully or semi-automatic content adaptation		Algorithmic tools programmed for fully or semi-automatic content creation	
	Importance	Usage	Importance	Usage*	Importance	Usage*	Importance	Usage	Importance	Usage**
Germany	76.3%	33.5%	63.6%	16.4%	61.5%	20.0%	29.8%	4.3%	25.6%	5.5%
Austria	81.3%	26.5%	74.0%	14.0%	78.0%	22.0%	40.0%	8.0%	42.0%	16.0%
Switzerland	72.6%	27.0%	67.3%	14.6%	64.6%	23.3%	33.1%	5.0%	32.7%	7.3%
France	78.2%	23.9%	72.3%	12.6%	60.2%	16.7%	60.9%	4.5%	51.8%	9.2%
Belgium	77.2%	24.6%	66.9%	12.6%	69.6%	20.6%	48.0%	2.4%	43.2%	8.8%
Netherlands	77.1%	29.0%	66.1%	15.2%	70.4%	17.5%	55.4%	5.8%	49.6%	9.5%
United Kingdom	73.2%	25.5%	56.3%	14.2%	64.4%	19.1%	41.9%	6.4%	41.9%	14.4%
Ireland	78.5%	22.6%	53.7%	14.1%	58.2%	22.9%	48.8%	3.5%	44.4%	9.6%
Sweden	70.3%	33.7%	72.6%	12.6%	59.1%	20.4%	47.3%	9.6%	42.6%	13.4%
Norway	57.7%	26.8%	54.7%	21.8%	55.6%	20.0%	37.0%	10.9%	42.3%	9.4%
Finland	81.3%	37.0%	71.5%	15.9%	66.4%	27.0%	43.1%	8.9%	36.5%	6.3%

www.communicationmonitor.eu / Zerfass et al. 2016 / n ^{min} = 2,081 PR professionals from 20 countries. Q 6: Search engines and social media platforms use algorithms to select and display content. Similar approaches might be used by organisations to automate their communication activities. Percentages: Frequency based on scale points 4-5. In your opinion: What is already used by your department/agency? ** Highly significant differences (chi-square test, $p \leq 0.01$). * Significant differences (chi-square test, $p \leq 0.05$).

Perceived importance and usage of algorithms for strategic communication across different European countries

	Adaptation to algorithms of online services like search engines or social media platforms		Algorithmic tools programmed to support decision-making		Algorithmic tools programmed for fully or semi-automatic content distribution		Algorithmic tools programmed for fully or semi-automatic content adaptation		Algorithmic tools programmed for fully or semi-automatic content creation	
	Importance	Usage	Importance	Usage*	Importance	Usage*	Importance	Usage	Importance	Usage**
Spain	74.8%	33.3%	78.0%	27.2%	69.9%	26.1%	51.9%	9.5%	56.5%	17.9%
Italy	66.2%	25.5%	70.4%	15.2%	69.3%	18.1%	44.8%	5.5%	47.9%	13.3%
Slovenia	68.3%	18.2%	75.0%	6.0%	70.5%	30.3%	55.2%	1.5%	56.5%	15.4%
Croatia	73.8%	31.9%	70.0%	12.0%	72.7%	25.0%	56.0%	6.6%	62.5%	15.2%
Serbia	75.4%	33.3%	71.2%	22.6%	66.1%	27.0%	47.5%	13.1%	60.9%	15.6%
Poland	67.3%	30.2%	67.3%	20.8%	64.7%	26.9%	41.5%	7.5%	39.6%	11.3%
Romania	84.9%	39.8%	75.3%	20.0%	78.9%	38.1%	49.4%	7.1%	53.3%	28.6%
Ukraine	74.5%	30.0%	68.4%	23.0%	72.5%	33.3%	47.3%	13.3%	58.9%	18.0%
Russia	79.6%	27.5%	66.7%	13.7%	70.8%	31.4%	50.0%	14.0%	55.1%	23.5%

Organisations integrating big data in their daily routines also use all kinds of algorithmic tools more frequently: the two are therefore closely connected

Analyse big data to guide day-to-day actions

r = 0.271 — Algorithmic tools programmed for fully or semi-automatic content creation

r = 0.256 — Adaptation to algorithms of online services like search engines or social media platforms

r = 0.235 — Algorithmic tools programmed for fully or semi-automatic content distribution

r = 0.229 — Algorithmic tools programmed for fully or semi-automatic content adaptation

r = 0.219 — Algorithmic tools programmed to support decision-making

Strength of correlation

Communication practices: from operational tasks to executive coaching

Chapter overview

The communication function of an organisation embraces a set of specific messaging and listening tasks which are necessary to reach overall goals. The function can be more or less institutionalised. Communication departments and professionals are often responsible for strategies, governance, and routine activities, while other members of the organisation communicate in the light of their particular roles.

Communication differs from other functions (finance, human resources, logistics, etc.) because it includes three aspects. Communication is a performance function when activities are realised, e.g. by writing Facebook posts or press releases, organising events or listening to stakeholders. Communication is a management function when such activities are disposed and aligned, e.g. by positioning a company or brand, planning campaigns, leading communication teams, etc. Last but not least, communication is also a second-order management function (Nothhaft, 2010) which influences the management behaviour of top executives and peers by confronting them with public opinion, critical issues, and alternative views.

This variety of tasks is a challenge for communication professionals and their role as sensemakers and sensenegotiators for organisations (Berger & Meng, 2014). Adding to the traditional distinction of operational communication and managing communication, Van Ruler and Verčič (2005) suggested that professionals can bring in reflective capacities to align organisations and their stakeholders. They can also advise and enable top executives and other members of the organisation in the field of media and communication. Coaching, training and consulting are relevant because employees act more and more often as "active agents in the communication area of a company" (Mazzei, 2014).

Empirical data from this survey show that all of these role requirements are relevant in practice. In a typical week, communicators spend 36.2 per cent of the productive time at work for operational communication (talking to colleagues and media, writing texts, monitoring, organising events, etc.). Managing activities related to planning, organising, leading staff, evaluating strategies, justifying spending and preparing for crises takes 27.8 per cent of the time. On average, 18.8 per cent are used for reflective communication management like aligning communication, the organisation/client and its stakeholders. Coaching, training and enabling members of the organisation or (internal) clients takes 17.2 per cent. The latter area has risen slightly by 2.5 points compared to a similar survey four years ago (Zerfass et al., 2012: 46). There are significant correlations with the hierarchical position of a communicator and with the job description – media relations professionals still spend nearly half of their time on operational work.

The study reveals that communicators employ different practices of coaching, advising or enabling when they support either senior managers or other staff. The most important activity when working with executives is delivering insights for decision-making (agreed by 71.9 per cent of the respondents), followed by advice on how to handle concrete challenges in communication (68.7 per cent). Less than half of the communicators state that they enable their executives to master communicative challenges on their own. Co-workers and other staff most often receive hands-on advice about communication tasks (65.2 per cent). Not surprisingly, the needs of executives and traditional ways of support are shaping the field. However, enabling others to reflect and communicate themselves is clearly an important part of the practice today. It reflects the growing need to deal with multiple voices in strategic communication (Zerfass & Viertmann, 2016).

How European communication professionals spend their productive time at work

Aligning communication, the organisation/client and its stakeholders
Studying business and social research reports, identifying organisational goals, monitoring public issues and stakeholder expectations, debating visions and business strategies with top management and other departments, developing scenarios, building legitimacy

Operational communication
Talking to colleagues and journalists, writing press releases and print/online texts, producing communication media, monitoring results of our activities, organising events etc.

Coaching, training, consulting and enabling members of the organisation or clients
On the vision, mission and other communication related issues as well as upgrading their communicative competence, preparing them for communicating with the media, stakeholders etc.

18.8%

17.2%

36.2%

27.8%
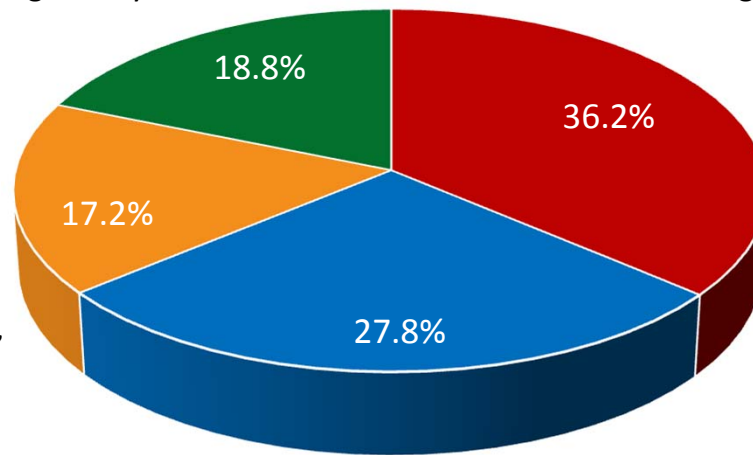
Managing communication activities and co-workers
Planning, organising, leading staff, budgeting, evaluating processes and strategies, justifying communication spending, preparing for crises

Heads of communication focus to a greater extent on strategic and reflective activities, but operational communication still takes one third of their time

Productive time spent at work
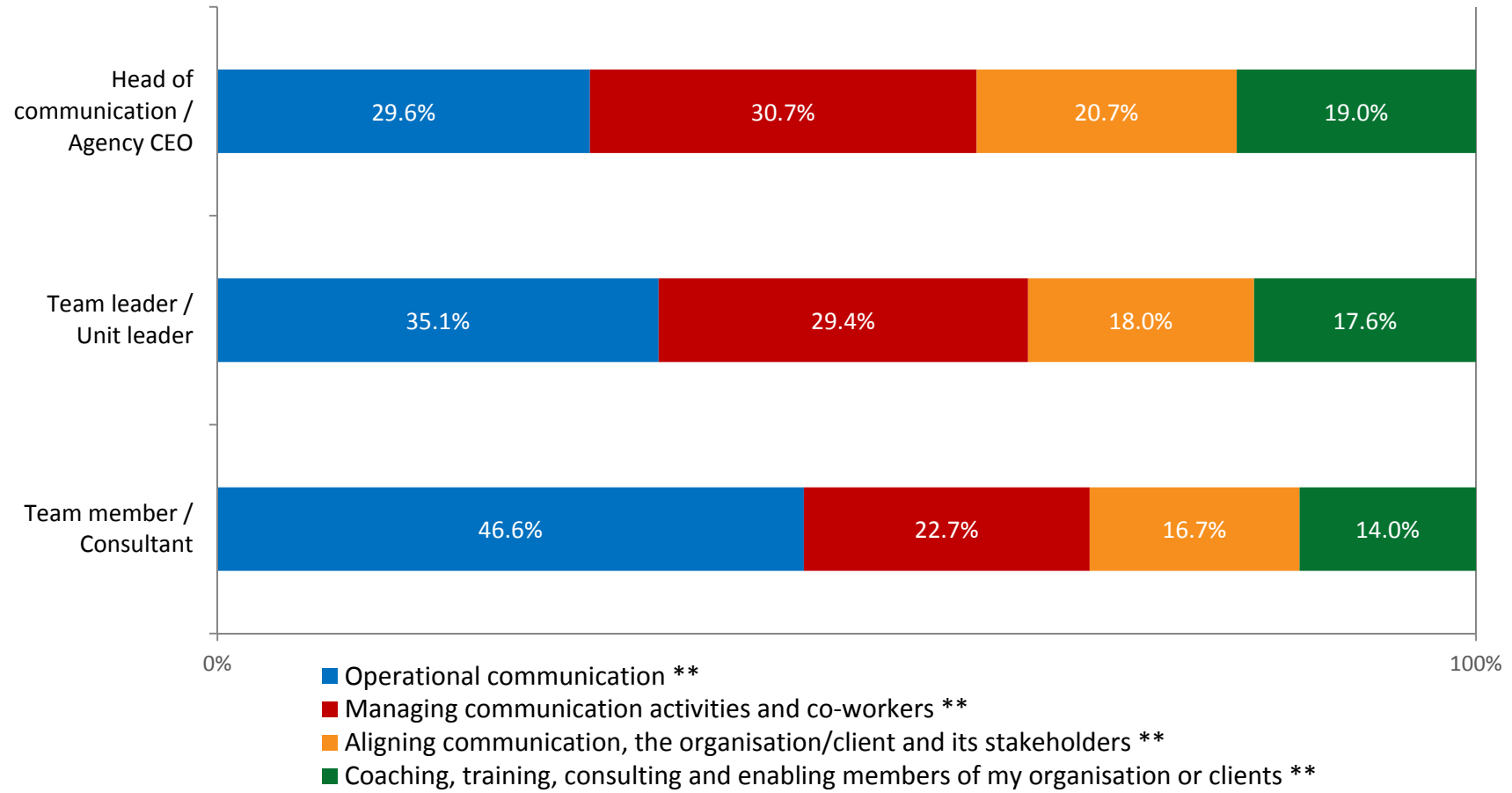
	Operational communication **	Managing communication activities and co-workers **	Aligning communication, the organisation/client and its stakeholders **	Coaching, training, consulting and enabling members of my organisation or clients **
Head of communication / Agency CEO	29.6%	30.7%	20.7%	19.0%
Team leader / Unit leader	35.1%	29.4%	18.0%	17.6%
Team member / Consultant	46.6%	22.7%	16.7%	14.0%

■ Operational communication **
■ Managing communication activities and co-workers **
■ Aligning communication, the organisation/client and its stakeholders **
■ Coaching, training, consulting and enabling members of my organisation or clients **

45

Professionals working in non-profit organisations use more time for operational communication and are least engaged in coaching colleagues

Productive time spent at work

	Operational communication **	Managing communication activities and co-workers	Aligning communication, the organisation/client and its stakeholders **	Coaching, training, consulting and enabling members of my organisation or clients **
Companies	36.0%	28.4%	19.4%	16.2%
Governmental organisations	39.3%	28.0%	15.7%	17.0%
Non-profit organisations	39.5%	27.8%	17.4%	15.2%
Consultancies & Agencies	34.2%	27.2%	19.7%	18.8%

■ Operational communication **
■ Managing communication activities and co-workers
■ Aligning communication, the organisation/client and its stakeholders **
■ Coaching, training, consulting and enabling members of my organisation or clients **

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Activity profiles of practitioners are significantly correlated to their age

Productive time spent at work

Age	Operational communication **	Managing communication activities and co-workers **	Aligning communication, the organisation/client and its stakeholders **	Coaching, training, consulting and enabling members of my organisation or clients **
29 or younger	45.1%	23.7%	18.7%	12.5%
30 - 39	38.5%	27.9%	17.9%	15.8%
40 - 49	33.9%	29.0%	18.7%	18.3%
50 - 59	30.9%	28.9%	20.2%	20.1%
60 or older	32.2%	25.5%	22.0%	20.3%

0% — 100%

- Operational communication **
- Managing communication activities and co-workers **
- Aligning communication, the organisation/client and its stakeholders **
- Coaching, training, consulting and enabling members of my organisation or clients **

47

Female practitioners spend more time for operational communication, while their male colleagues are more involved in alignment processes

Productive time spent at work
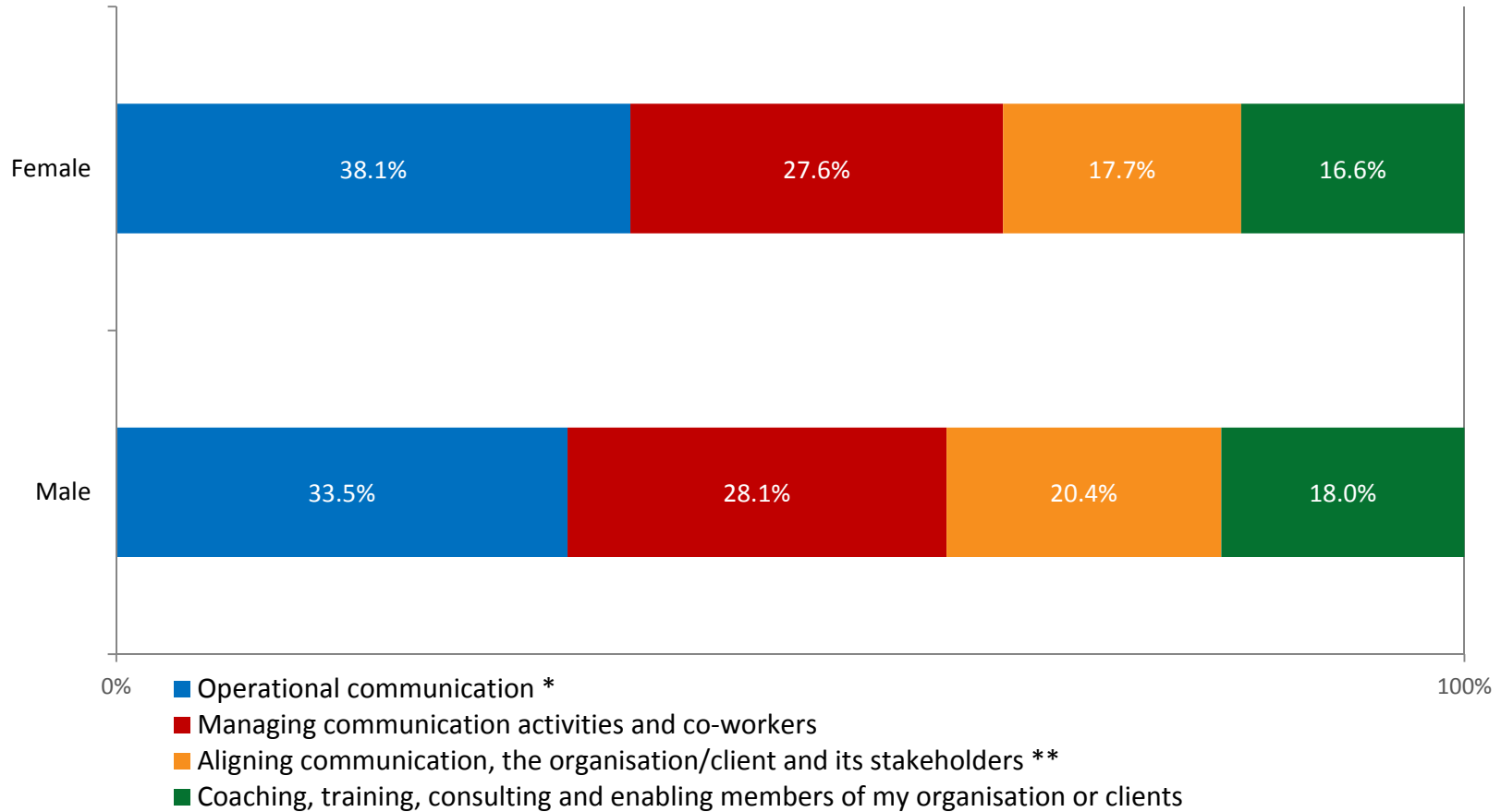
Legend:
- ■ Operational communication *
- ■ Managing communication activities and co-workers
- ■ Aligning communication, the organisation/client and its stakeholders **
- ■ Coaching, training, consulting and enabling members of my organisation or clients

Female: Operational communication 38.1% | Managing communication activities and co-workers 27.6% | Aligning communication 17.7% | Coaching, training 16.6%

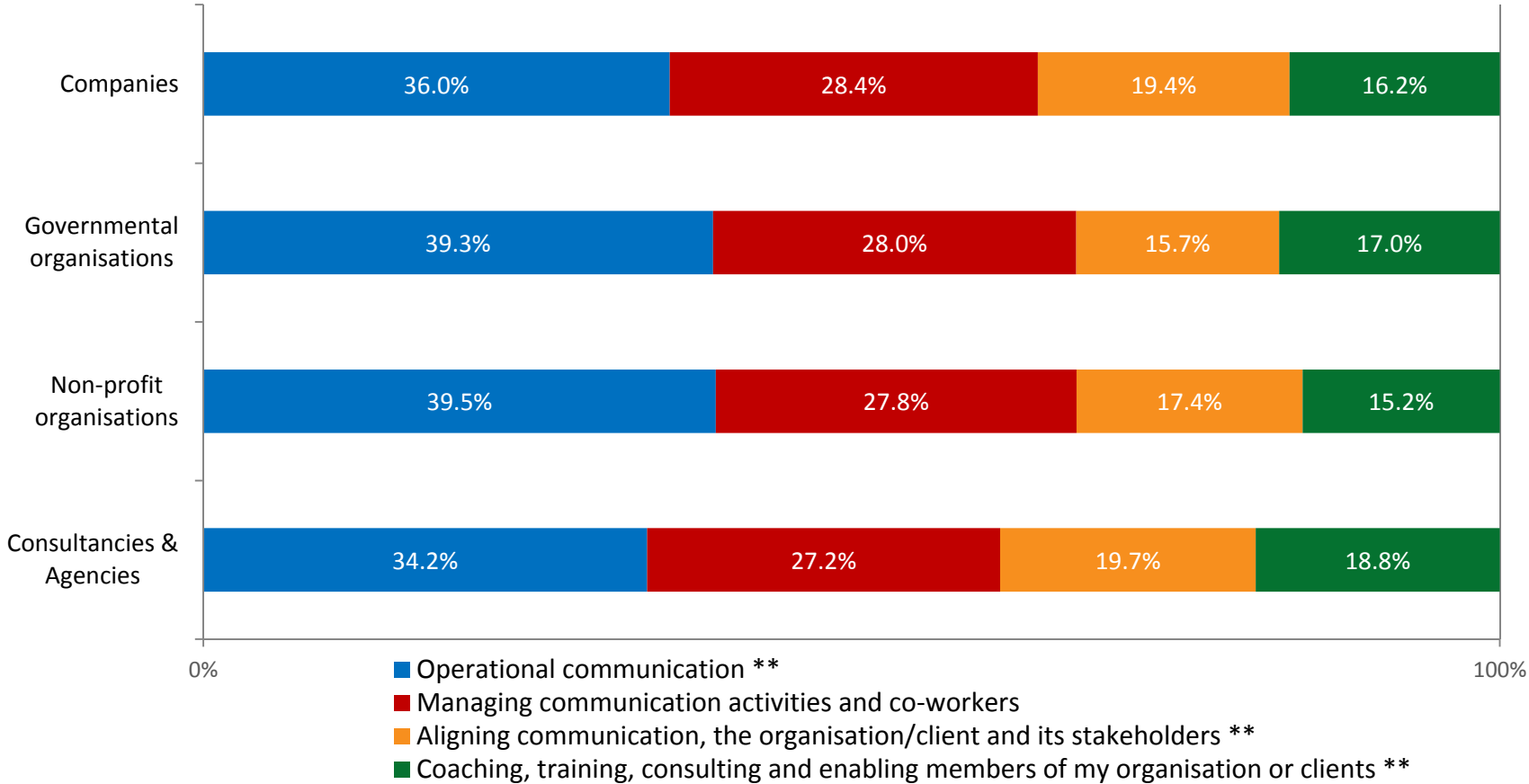Male: Operational communication 33.5% | Managing communication activities and co-workers 28.1% | Aligning communication 20.4% | Coaching, training 18.0%

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,710 PR professionals. Q 7: Please think about how you spend most of your time at work. Please divide your productive time spent at work (values should add up to 100%). In a typical week, I spend the following amount of time with …
Figure displays median for each item; values have been rounded based on mean values. ** Highly significant differences (Pearson correlation, $p \leq 0.01$).
* Significant differences (Pearson correlation, $p \leq 0.05$).

Working in media relations and online is strongly hands-on and operational

Productive time spend at work by professionals working in the field of …

Field	Operational communication **	Managing communication activities and co-workers **	Aligning communication, the organisation/client and its stakeholders **	Coaching, training, consulting and enabling members of my organisation or clients **
Strategy and coordination	27.1%	31.8%	21.3%	19.8%
Consultancy, advising, coaching, key account	27.8%	27.6%	20.5%	24.1%
Marketing, brand, consumer communication	34.5%	30.4%	18.9%	16.3%
Overall communication	38.8%	27.8%	17.4%	16.0%
Online communication	42.3%	25.7%	16.6%	15.4%
Media relations	46.9%	24.5%	15.5%	13.2%

0%   100%

■ Operational communication **
■ Managing communication activities and co-workers **
■ Aligning communication, the organisation/client and its stakeholders **
■ Coaching, training, consulting and enabling members of my organisation or clients **
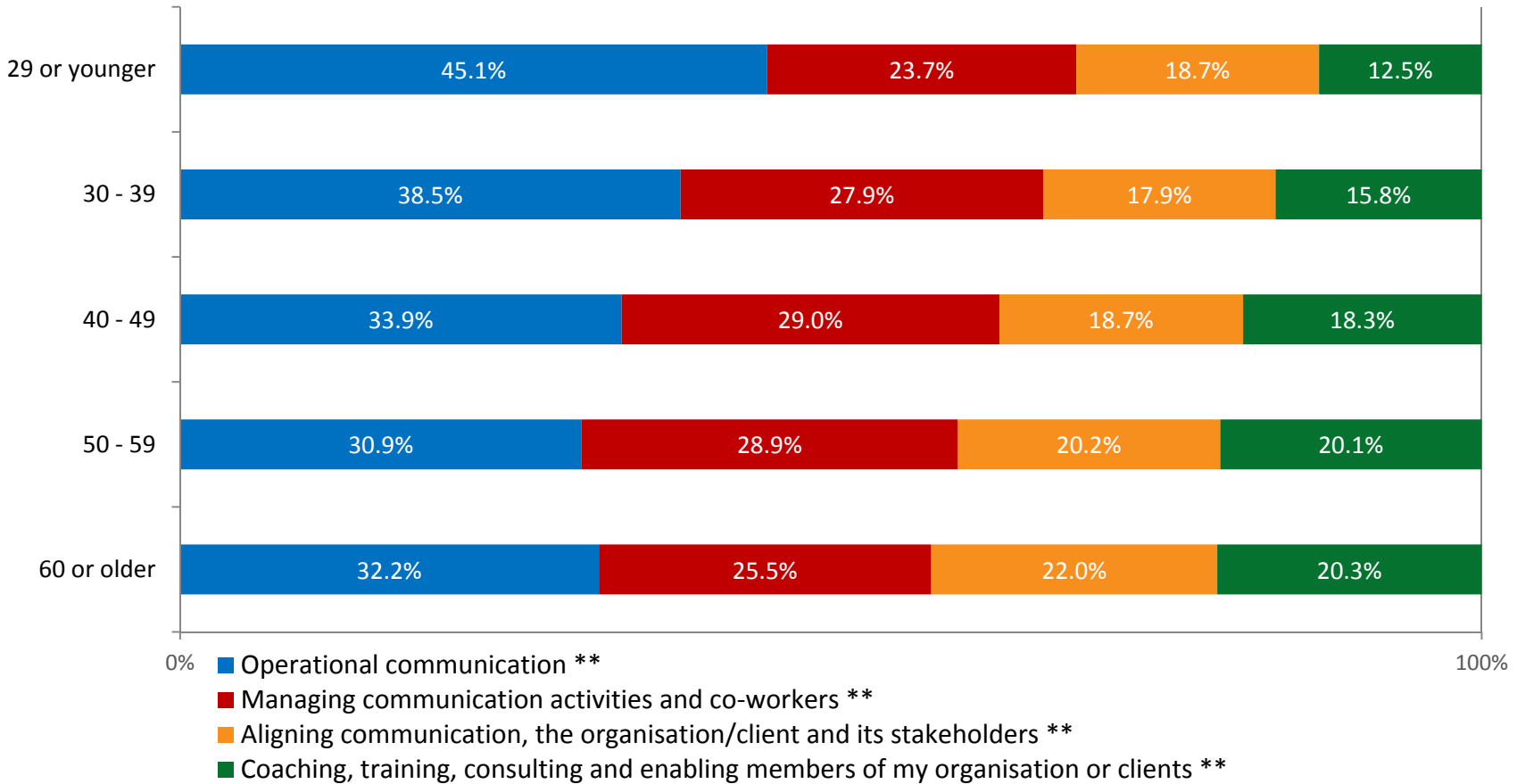
www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,710 PR professionals. Q 7: Please think about how you spend most of your time at work. Please divide your productive time spent at work (values should add up to 100%). In a typical week, I spend the following amount of time with … Figure displays median for each item; values have been rounded based on mean values. ** Highly significant differences (Independent samples T-Test, p ≤ 0.01).

Practice of communication management in various European countries

Country	Operational communication	Managing communication activities and co-workers	Aligning communication, the organisation/client and its stakeholders	Coaching, training, consulting and enabling members of my organisation or clients
Germany	31.2%	27.6%	21.4%	19.8%
Austria	37.8%	28.3%	14.8%	19.2%
Switzerland	37.1%	28.6%	18.0%	16.4%
France	34.6%	29.8%	17.0%	18.7%
Belgium	38.9%	24.9%	19.7%	16.6%
Netherlands	32.7%	27.3%	21.5%	18.6%
United Kingdom	33.7%	29.6%	18.9%	17.8%
Ireland	43.0%	27.1%	16.8%	13.1%
Sweden	33.5%	29.3%	16.2%	21.0%
Norway	38.2%	25.3%	18.1%	18.4%
Finland	41.5%	25.0%	15.4%	18.3%
Spain	34.7%	28.0%	20.8%	16.5%
Italy	33.4%	29.9%	19.7%	17.0%
Slovenia	45.7%	24.7%	16.5%	13.1%
Croatia	38.6%	24.7%	19.7%	17.1%
Serbia	37.8%	29.8%	17.2%	15.2%
Poland	40.9%	25.3%	19.4%	14.3%
Romania	38.6%	27.3%	19.8%	14.3%
Ukraine	33.4%	31.7%	19.2%	15.7%
Russia	36.3%	28.3%	18.9%	16.5%

■ Operational communication
■ Managing communication activities and co-workers
■ Aligning communication, the organisation/client and its stakeholders
■ Coaching, training, consulting and enabling members of my organisation or clients

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,356 PR professionals from 20 countries. Q 7: Please think about how you spend most of your time at work. Please divide your productive time spent at work (values should add up to 100%). In a typical week, I spend the following amount of time with … Figure displays median for each item; values have been rounded based on mean values.

50

How communication professionals coach, advise and enable peers and superiors

Coaching, advising or enabling executives/senior managers

Activity	Percentage
Providing information/insights for decisions and activities	71.9%
Advising how to manage specific communication challenges	68.7%
Enabling them to recognise the communicative dimension of their decisions and activities	60.9%
Enabling them to master communicative challenges on their own	48.5%
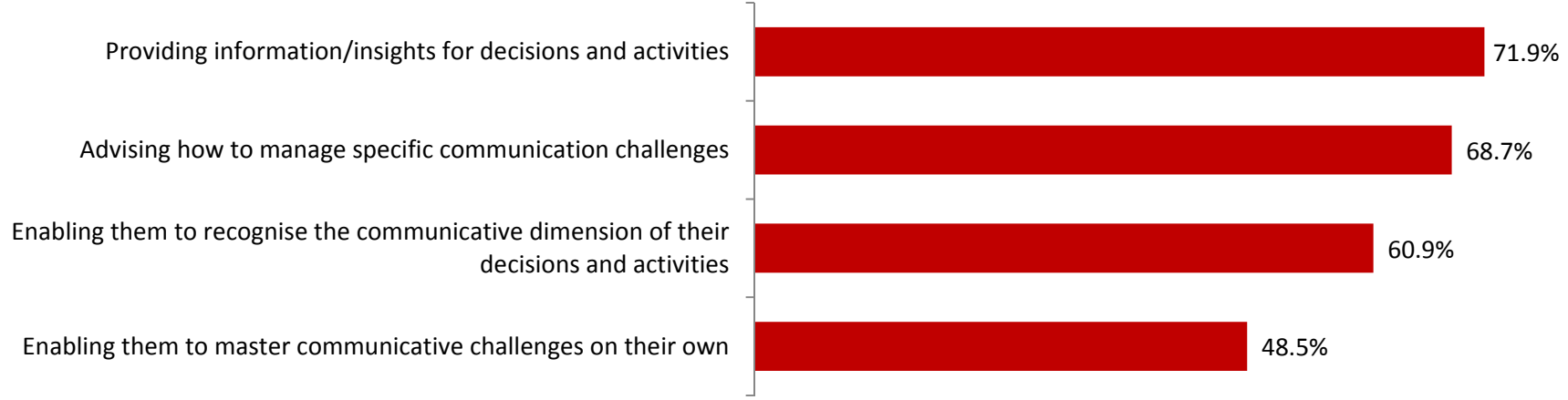
Coaching, advising or enabling other staff

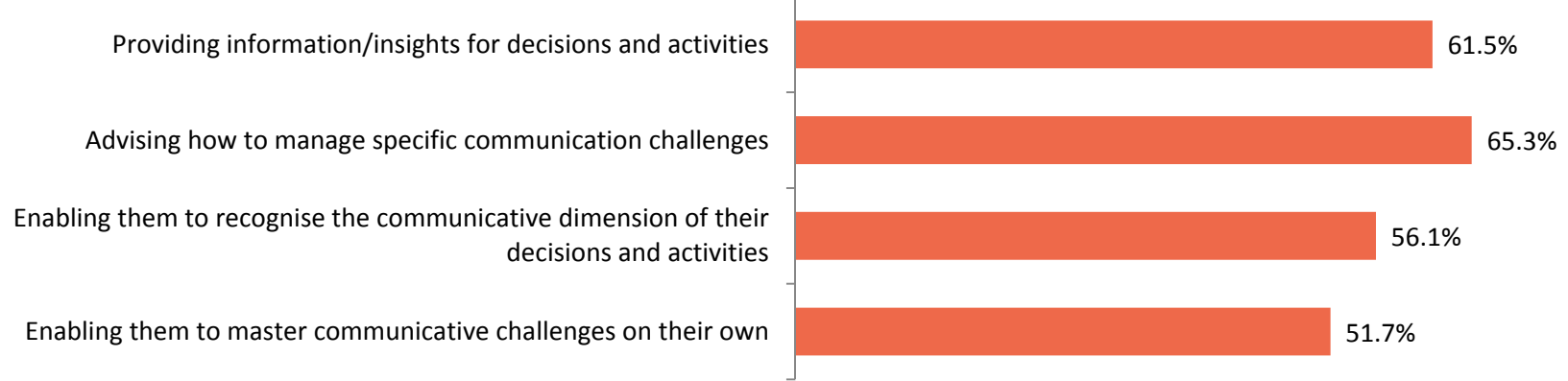| Activity	Percentage
Providing information/insights for decisions and activities	61.5%
Advising how to manage specific communication challenges	65.3%
Enabling them to recognise the communicative dimension of their decisions and activities	56.1%
Enabling them to master communicative challenges on their own	51.7%

www.communicationmonitor.eu / Zerfass et al. 2016 / n [min] = 1,907 PR professionals who spend at least 10% of their time for coaching, training, consulting and enabling. Q 8: When you coach, advise or enable executives/senior managers or other members of your organisation/client, how often do you practice the following activities? Scale 1 (Not at all) – 5 (Very often) for both categories. Percentages: Frequency based on scale points 4-5.

Advising and enabling is practised differently in various types of organisations

Support top executive(s)/senior manager(s) by providing information/insights for their decisions and activities
- Joint stock companies: 73.1%
- Private companies: 73.8%
- Governmental organisations: 62.6%
- Non-profit organisations: 68.5%
- Consultancies & Agencies: 74.5%

Advise top executive(s)/senior manager(s) how to handle specific communicative challenges *
- Joint stock companies: 71.1%
- Private companies: 63.4%
- Governmental organisations: 63.7%
- Non-profit organisations: 67.6%
- Consultancies & Agencies: 71.8%

Enable top executive(s)/senior manager(s) to recognise the communicative dimension of their decisions and activities *
- Joint stock companies: 60.6%
- Private companies: 59.6%
- Governmental organisations: 55.7%
- Non-profit organisations: 67.9%
- Consultancies & Agencies: 61.2%

Enable top executive(s)/senior manager(s) to master communicative challenges on their own *
- Joint stock companies: 46.6%
- Private companies: 44.1%
- Governmental organisations: 44.5%
- Non-profit organisations: 46.4%
- Consultancies & Agencies: 53.6%

■ Joint stock companies ■ Private companies ■ Governmental organisations ■ Non-profit organisations ■ Consultancies & Agencies

www.communicationmonitor.eu / Zerfass et al. 2016 / n [min] = 1,907 PR professionals who spend at least 10% of their time for coaching, training, consulting and enabling. Q 8: When you coach, advise or enable executives/senior managers or other members of your organisation/client, how often do you practice the following activities? Scale 1 (Not at all) – 5 (Very often). Percentages: Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, p ≤ 0.01).

Advising, enabling, coaching and consulting top executives / senior managers in different European countries

	Advise how to handle specific communi-cative challenges	Enable to master communi-cative challenges on their own	Provide information/ insights for their decisions and activities	Enable to recognise the communica-tive dimen-sion of their decisions and activities		Advise how to handle specific communi-cative challenges	Enable to master communi-cative challenges on their own	Provide information/ insights for their decisions and activities	Enable to recognise the communica-tive dimen-sion of their decisions and activities
Germany	67.6%	43.8%	77.2%	60.4%	Finland	52.6%	43.9%	58.4%	57.0%
Austria	65.1%	53.5%	64.3%	48.8%	Spain	71.9%	59.2%	74.2%	65.3%
Switzerland	70.2%	37.4%	62.6%	61.5%	Italy	66.4%	51.8%	70.8%	63.4%
France	60.0%	36.6%	68.2%	54.8%	Slovenia	70.0%	42.0%	67.3%	55.1%
Belgium	57.4%	50.0%	70.6%	53.7%	Croatia	81.3%	59.0%	88.8%	68.8%
Netherlands	72.6%	48.7%	71.8%	65.5%	Serbia	64.6%	54.2%	78.7%	71.4%
United Kingdom	74.4%	47.8%	76.4%	62.4%	Poland	51.2%	31.8%	64.3%	59.5%
Ireland	76.0%	53.2%	76.3%	73.3%	Romania	67.2%	43.5%	70.5%	50.0%
Sweden	70.0%	57.3%	60.4%	62.9%	Ukraine	84.4%	66.7%	88.9%	72.7%
Norway	87.5%	62.5%	66.0%	60.4%	Russia	61.0%	38.1%	70.0%	50.0%

Strategic issues and communication channels

Chapter overview

Digitisation, mediatisation and new demands in business and society have changed communication management dramatically. The longitudinal data collected by the European Communication Monitor for one decade (2007-2016) substantiates this development on the strategic and operational level.

Linking business strategy and communication as well as coping with the digital evolution are consistently the key challenges for communication management over the past ten years. Both aspects have been continuously ranked among the top three most important strategic issues. There is still much uncertainty about these topics. Responses from more than 21,000 communication professionals across Europe show that strategic alignment is the most stable issue (mentioned by at least 42 per cent in every single year). Digitalisation had a peak in 2007 and again from 2010-2012, when it was top of mind for communicators across Europe. It is the only strategic issue that was ever supported by more than half of the respondents (up to 54.9 per cent). Interestingly, the relevance has declined – only one third believes that the topic is one of the most important challenges right now in 2016.
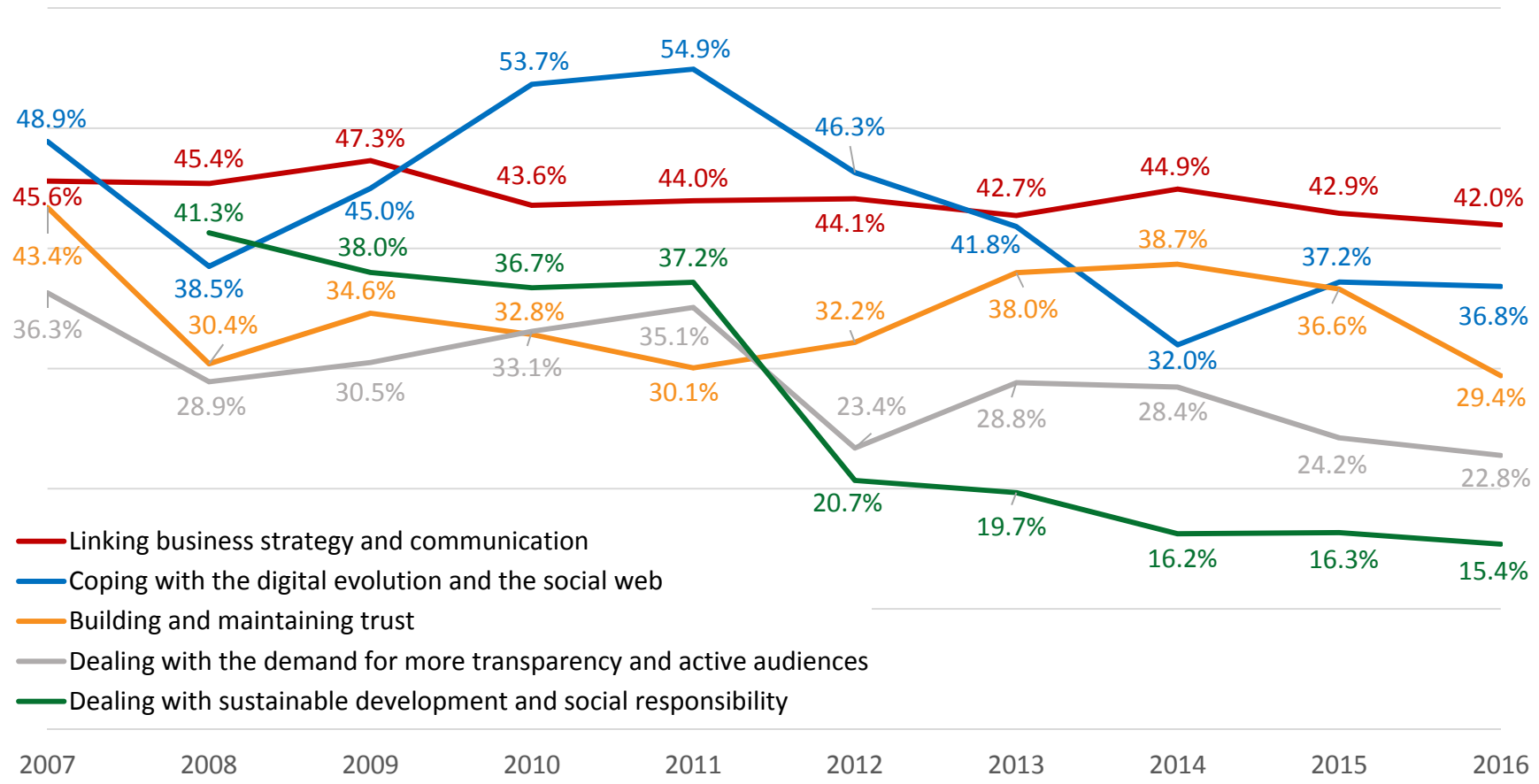
Dealing with sustainable development and social responsibility took a similar path. It started as the number two issue in 2008. Four out of ten professionals assessed this a top priority in the following years until 2011. Since then the perceived relevance has dropped sharply – only 15.5 per cent of the ECM 2016 respondents believe that it will be a top issue for the profession in the near future. Clearly CSR communication is more routinised today and not a black box anymore (Tench et al., 2014). Another notable issue is building and maintaining trust. This was mentioned as a key challenge by 29.4 per cent of the respondents in the current survey and was always rated important by a similar or larger fraction during the last ten years. Practitioners are experiencing that trust in organisations is steadily under siege.

The dynamic development of the field is also visible on the level of communication channels. An analysis based on 13,709 responses over ten years shows that most instruments have either gained or lost in importance. Only a minority of communication professionals rated social media important between 2007 and 2011. This has clearly changed. In 2016, three out of four ECM respondents (76.2 per cent) attributed importance to such instruments, and 88.9 per cent stated that they will be important for addressing stakeholders in 2019. A similar positive development can be shown for online communication via websites, intranets and e-mails. Quite interestingly, the rise of digital instruments is complemented by a growing relevance of face-to-face communication. It is the number one instrument for strategic communication today in the ECM 2016 (77.6 per cent approval), whereas only half of the practitioners thought it was important ten years earlier in 2007. The trend towards one-to-one stakeholder communication, either real or virtual, has impaired traditional instruments like press and media relations. Collaborating with print media, a clear champion from 2007 until 2011, has steadily lost in importance. 64.1 per cent still believe in its importance today. This figure drops dramatically to 30.2 per cent in 2019 (future importance).

This large-scale empirical study shows that modern communication management has been emancipated from its roots in media relations, copywriting and journalism. It is a global trend supported by monitor studies in Asia-Pacific (Macnamara et al., 2015) and Latin America (Moreno et al., 2015). Digital communication as well as new gatekeepers and influencers have to be taken into account. This offers many opportunities but also needs a critical reflection about emerging power structures and new rules of the game (Motion et al., 2016).

Development of strategic issues for communication management in Europe over the last decade (10 years)

Strategic issues perceived as most important

Legend:
- **Linking business strategy and communication** (red)
- **Coping with the digital evolution and the social web** (blue)
- **Building and maintaining trust** (orange)
- **Dealing with the demand for more transparency and active audiences** (grey)
- **Dealing with sustainable development and social responsibility** (green)

X-axis: 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016

Data labels:
- Coping with the digital evolution and the social web (blue): 48.9%, 38.5%, 45.0%, 53.7%, 54.9%, 46.3%, 41.8%, 32.0%, 37.2%, 36.8%
- Linking business strategy and communication (red): 45.6%, 45.4%, 47.3%, 43.6%, 44.0%, 44.1%, 42.7%, 44.9%, 42.9%, 42.0%
- Building and maintaining trust (orange): 43.4%, 30.4%, 34.6%, 32.8%, 30.1%, 32.2%, 38.0%, 38.7%, 36.6%, 29.4%
- Dealing with the demand for more transparency and active audiences (grey): 36.3%, 28.9%, 30.5%, 33.1%, 35.1%, 23.4%, 28.8%, 28.4%, 24.2%, 22.8%
- Dealing with sustainable development and social responsibility (green): 41.3%, 38.0%, 36.7%, 37.2%, 20.7%, 19.7%, 16.2%, 16.3%, 15.4%

Most important strategic issues for communication management until 2019

Issue	Percentage
Linking business strategy and communication	42.0%
Dealing with the speed and volume of information flow	38.0%
Coping with the digital evolution and the social web	36.8%
Matching the need to address more audiences and channels with limited resources	33.8%
Strengthening the role of the communication function in supporting top-management decision making	30.8%
Building and maintaining trust	29.4%
Using big data and/or algorithms for communication	23.4%
Dealing with the demand for more transparency and active audiences	22.8%
Dealing with sustainable development and social responsibility	15.4%
Explaining the value of communication to top executives	15.3%
Enable, coach and advise senior manager(s) and other staff	12.4%

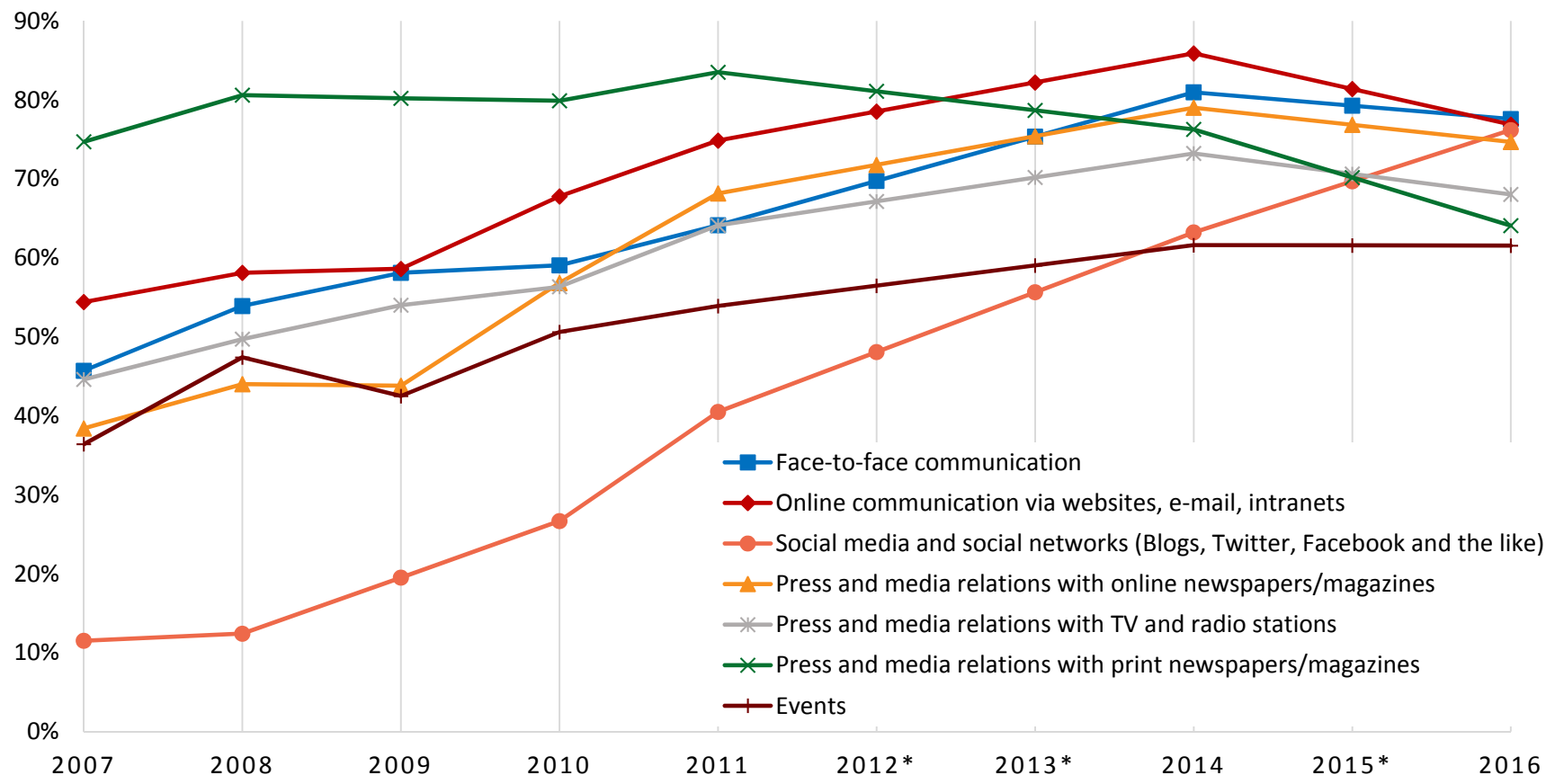# Perceived relevance of strategic issues in Western and Northern Europe

	Linking business strategy and communication	Dealing with the speed and volume of information flow	Coping with the digital evolution and the social web	Strengthening the role of the communication function in supporting top-manage-ment decision making	Building and maintaining trust	Using big data and/or algorithms for communication	Enable, coach and advise senior manager(s) and other staff
Germany	47.2%	35.2%	35.8%	27.8%	30.1%	21.0%	13.1%
Austria	32.1%	44.6%	39.3%	26.8%	35.7%	17.9%	12.5%
Switzerland	40.0%	45.1%	40.0%	25.1%	31.4%	13.7%	14.3%
France	27.0%	35.0%	51.0%	28.0%	23.0%	27.0%	14.0%
Belgium	44.1%	44.8%	45.5%	30.8%	21.7%	25.9%	11.9%
Netherlands	42.9%	34.3%	25.7%	32.1%	32.1%	22.9%	17.9%
United Kingdom	47.0%	34.8%	40.8%	42.5%	25.4%	19.2%	10.8%
Ireland	46.2%	26.0%	44.2%	46.2%	21.2%	20.2%	8.7%
Sweden	37.5%	35.7%	29.5%	27.7%	38.4%	20.5%	19.6%
Norway	46.9%	42.2%	35.9%	26.6%	18.8%	23.4%	7.8%
Finland	44.3%	36.4%	33.6%	34.3%	19.3%	17.9%	22.9%

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,356 PR professionals from 20 countries. Q 9: Please pick those three (3) issues which you believe will be most important for public relations / communication management within the next three years!

Perceived relevance of strategic issues in Southern and Eastern Europe

	Linking business strategy and communication	Dealing with the speed and volume of information flow	Coping with the digital evolution and the social web	Strengthening the role of the communication function in supporting top-management decision making	Building and maintaining trust	Using big data and/or algorithms for communication	Enable, coach and advise senior manager(s) and other staff
Spain	50.0%	32.0%	25.0%	39.0%	35.5%	23.3%	12.8%
Italy	39.3%	27.0%	36.2%	34.4%	33.1%	26.4%	14.1%
Slovenia	33.3%	49.3%	36.0%	37.3%	38.7%	25.3%	6.7%
Croatia	36.8%	37.7%	36.8%	22.6%	28.3%	24.5%	12.3%
Serbia	41.4%	41.4%	40.0%	22.9%	34.3%	30.0%	8.6%
Poland	50.0%	50.0%	28.3%	35.0%	36.7%	23.3%	6.7%
Romania	36.4%	35.2%	35.2%	20.5%	36.4%	29.5%	4.5%
Ukraine	51.5%	39.7%	25.0%	23.5%	51.5%	27.9%	5.9%
Russia	36.8%	45.6%	47.4%	21.1%	31.6%	36.8%	7.0%

Changing relevance of key channels and instruments during the last 10 years
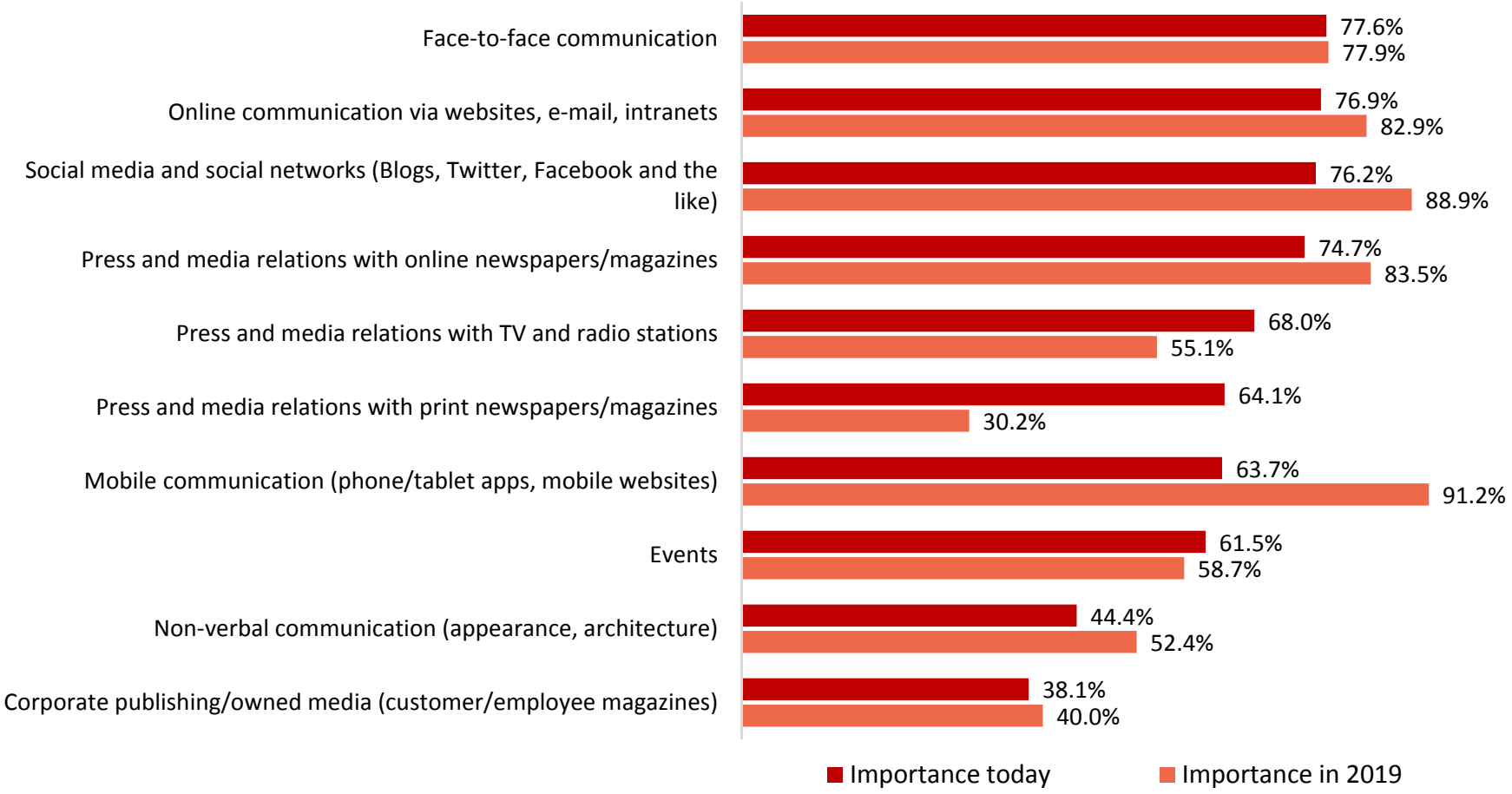
Perceived importance for addressing stakeholders, gatekeepers and audiences

Legend:
- Face-to-face communication
- Online communication via websites, e-mail, intranets
- Social media and social networks (Blogs, Twitter, Facebook and the like)
- Press and media relations with online newspapers/magazines
- Press and media relations with TV and radio stations
- Press and media relations with print newspapers/magazines
- Events

Importance of communication channels/instruments today and in the future

Perceived importance for addressing stakeholders, gatekeepers and audiences today and in three years

Channel/Instrument	Importance today	Importance in 2019
Face-to-face communication	77.6%	77.9%
Online communication via websites, e-mail, intranets	76.9%	82.9%
Social media and social networks (Blogs, Twitter, Facebook and the like)	76.2%	88.9%
Press and media relations with online newspapers/magazines	74.7%	83.5%
Press and media relations with TV and radio stations	68.0%	55.1%
Press and media relations with print newspapers/magazines	64.1%	30.2%
Mobile communication (phone/tablet apps, mobile websites)	63.7%	91.2%
Events	61.5%	58.7%
Non-verbal communication (appearance, architecture)	44.4%	52.4%
Corporate publishing/owned media (customer/employee magazines)	38.1%	40.0%

■ Importance today   ■ Importance in 2019

Mobile, social and all kinds of online communication are steadily rising

Perceived importance for addressing stakeholders, gatekeepers and audiences today and in three years

Δ 27.5%   Δ 12.7%   Δ 8.8%   Δ 6.0%

91.2%
63.7%
76.2%
88.9%
74.7%
83.5%
76.9%
82.9%

Mobile communication (phone/tablet apps, mobile websites)

Social media and social networks (Blogs, Twitter, Facebook and the like)

Press and media relations with online newspapers/magazines

Online communication via websites, e-mail, intranets

■ Importance today   ■ Importance in 2019

Global comparison: How communication channels are rated by practitioners in Europe, Asia-Pacific and Latin America

Perceived importance for addressing stakeholders, gatekeepers and audiences

Channel	Europe	Asia-Pacific	Latin America
Face-to-face communication	77.6%	71.2%	71.5%
Online communication via websites, e-mail, intranets	76.9%	73.6%	80.1%
Social media and social networks (Blogs, Twitter, Facebook and the like)	76.2%	75.0%	68.1%
Press and media relations with online newspapers/magazines	74.7%	73.2%	76.8%
Press and media relations with TV and radio stations	68.0%	66.8%	70.7%
Press and media relations with print newspapers/magazines	64.1%	76.5%	66.3%
Mobile communication (phone/tablet apps, mobile websites)	63.7%	66.5%	60.5%
Events	61.5%	59.8%	73.2%
Non-verbal communication (appearance, architecture)	44.4%	42.3%	58.5%
Corporate publishing/owned media (customer/employee magazines)	38.1%	39.1%	56.3%

■ Europe ■ Asia-Pacific ■ Latin America

Younger practitioners rate mobile communication, social media and events significantly higher than peers with a longer life experience

Perceived importance in different age groups

	29 or younger		30 – 39		40 – 49		50 – 59		60 or older	
	%	M	%	M	%	M	%	M	%	M
Press and media relations with print newspapers/magazines	61.2%	3.76	63.0%	2.78	63.6%	3.79	69.1%	3.89	63.8%	3.77
Press and media relations with online newspapers/magazines	80.8%	4.22**	78.5%	4.09**	72.8%	3.99**	71.4%	3.96**	55.9%	3.71**
Press and media relations with TV and radio stations	67.4%	3.87	68.9%	3.90	67.1%	3.89	69.3%	3.92	65.7%	3.89
Corporate publishing/owned media (customer/employee magazines)	38.8%	3.24**	39.8%	3.27**	36.8%	3.15**	38.6%	3.18**	30.7%	2.96**
Online communication via websites, e-mail, intranets	76.5%	4.12	76.4%	4.07	78.6%	4.09	76.3%	4.07	69.2%	3.95
Social media and social networks (Blogs, Twitter, Facebook and the like)	85.3%	4.35**	80.3%	4.16**	74.6%	4.00**	69.8%	3.87**	56.7%	3.71**
Mobile communication (phone/tablet apps, mobile websites)	74.1%	4.03**	63.6%	3.79**	62.5%	3.76**	60.8%	3.70**	56.7%	3.65**
Events	72.0%	3.95**	63.3%	3.78**	60.9%	3.68**	55.4%	3.61**	47.6%	3.45**
Face-to-face communication	75.8%	4.11	77.8%	4.18	78.6%	4.19	76.4%	4.18	77.7%	4.17
Non-verbal communication (appearance, architecture)	50.8%	3.49**	48.3%	3.46**	41.6%	3.31**	41.3%	3.24**	32.7%	3.12**

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,583 PR professionals. Q 12: How important are the following methods in addressing stakeholders, gatekeepers and audiences today? In your opinion, how important will they be in three years? Scales 1 (Not important) – 5 (Very important). Percentages: Frequency based on scale points 4-5. ** Highly significant differences (Pearson product-moment correlation based on age as metric variable, $p \leq 0.01$).

Governmental organisations express the strongest belief in the future relevance of TV and radio as important channels for public relations

Perceived importance in various types of organisations

	Joint stock companies		Private companies		Governmental organisations		Non-profit organisations		Consultancies & Agencies	
	2016	2019	2016	2019	2016	2019	2016	2019	2016	2019
Press and media relations with print newspapers/magazines	66.5%	29.9%	64.7%	28.8%	61.6%	30.5%	61.9%	28.2%	64.1%	31.6%
Press and media relations with online newspapers/magazines	75.6%	85.5%	76.1%	85.3%	71.8%	83.3%	76.8%	83.2%	73.9%	81.6%
Press and media relations with TV and radio stations	61.6%	52.5%**	60.8%	46.3%**	72.6%	63.5%**	64.1%	52.2%**	74.4%	58.6%**
Corporate publishing/owned media (customer/employee magazines)	39.3%**	40.0%	44.8%**	42.9%	33.8%**	33.6%	35.3%**	34.4%	36.6%**	42.5%
Online communication via websites, e-mail, intranets	75.9%	83.1%	79.0%	82.8%	83.0%	83.5%	85.7%	88.8%	71.5%	80.8%
Social media and social networks (Blogs, Twitter, Facebook and the like)	70.6%	89.2%	75.6%	87.7%	75.0%	88.5%	86.1%	93.6%	76.6%	88.0%
Mobile communication (phone/tablet apps, mobile websites)	61.1%	91.6%	65.7%	91.2%	65.0%	92.9%	68.9%	94.0%	62.2%	89.5%
Events	62.3%	58.4%	65.8%	64.6%	58.4%	56.5%	68.1%	63.2%	58.1%	55.5%
Face-to-face communication	81.3%	78.8%	80.0%	78.2%	74.9%	78.5%	80.5%	79.1%	74.5%	76.6%
Non-verbal communication (appearance, architecture)	42.1%	51.2%	50.0%	57.1%	42.8%	53.6%	42.7%	48.8%	44.2%	51.5%

Importance of communication channels in Western and Northern Europe today

	Press and media relations with print newspapers/ magazines	Press and media relations with online newspapers/ magazines	Press and media relations with TV and radio stations	Corporate publishing/ owned media	Online communica- tion via web- sites, e-mail, intranets	Social media and social networks	Mobile communi- cation	Events	Face-to- face commu- nication	Non- verbal commu- nication
Germany	69.6%	73.3%	53.8%	46.8%	77.8%	71.8%	53.8%	58.9%	71.9%	25.1%
Austria	78.2%	64.8%	74.1%	38.2%	83.3%	63.6%	58.2%	54.7%	85.5%	40.0%
Switzerland	75.0%	70.9%	62.2%	36.8%	79.5%	62.8%	57.6%	64.1%	81.3%	42.9%
France	64.6%	82.3%	70.4%	30.9%	73.5%	72.4%	66.7%	63.8%	72.2%	45.4%
Belgium	61.9%	72.1%	56.8%	38.1%	84.2%	79.6%	55.4%	70.3%	79.3%	39.6%
Netherlands	68.1%	73.7%	70.7%	38.1%	83.6%	76.7%	70.9%	56.4%	79.7%	47.0%
United Kingdom	64.1%	78.1%	61.9%	36.5%	80.1%	76.5%	73.1%	59.1%	75.0%	43.1%
Ireland	76.5%	72.3%	85.1%	36.4%	80.8%	80.2%	78.2%	58.4%	84.2%	45.5%
Sweden	62.7%	70.0%	66.1%	29.4%	78.0%	70.0%	63.3%	50.5%	80.0%	45.4%
Norway	71.4%	81.0%	74.6%	30.2%	74.6%	79.4%	55.6%	52.4%	66.7%	30.0%
Finland	66.9%	77.0%	54.3%	42.0%	84.8%	77.5%	56.1%	52.2%	79.0%	40.6%

Importance of communication channels in Southern and Eastern Europe today

	Press and media relations with print newspapers/ magazines	Press and media relations with online newspapers/ magazines	Press and media relations with TV and radio stations	Corporate publishing/ owned media	Online communica- tion via web- sites, e-mail, intranets	Social media and social networks	Mobile communi- cation	Events	Face-to- face commu- nication	Non- verbal commu- nication
Spain	66.1%	73.2%	71.0%	43.9%	67.9%	75.0%	60.1%	61.1%	78.4%	57.5%
Italy	59.6%	65.4%	64.9%	32.9%	68.4%	66.9%	63.2%	65.8%	74.2%	42.4%
Slovenia	64.9%	75.7%	82.2%	40.5%	73.6%	74.0%	53.5%	48.6%	72.2%	52.7%
Croatia	71.0%	83.5%	86.9%	41.0%	74.5%	83.5%	68.4%	69.4%	80.8%	51.5%
Serbia	69.6%	69.1%	75.0%	36.2%	71.6%	85.3%	75.4%	67.6%	79.4%	60.9%
Poland	56.4%	72.7%	70.9%	30.9%	69.1%	69.1%	52.7%	52.7%	72.7%	34.5%
Romania	42.2%	83.8%	72.2%	46.9%	87.3%	83.8%	74.4%	72.8%	76.5%	53.2%
Ukraine	34.3%	89.6%	73.1%	37.9%	65.7%	89.6%	67.2%	77.3%	84.6%	53.8%
Russia	68.5%	72.2%	74.1%	40.7%	85.2%	87.0%	60.4%	72.2%	85.2%	46.3%

Social media influencers

Chapter overview

Organisations are increasingly challenged by multipliers and influencers on the social web. Some "'nobodies' of the past are … the new 'somebodies' demanding the attention of communication professionals" (Booth & Matic, 2011: 184). Professional and part-time bloggers, community managers and activists can gain power over the public perception of brands and issues if they become opinion leaders in social networks. The role of opinion leaders has been highlighted by Katz and Lazarsfeld (1955) in their seminal work on the two-step flow of communication. They "extert an unequal amount of influence on the decision of others" (Rogers & Cartano, 1962: 435). Along this line, social media influencers (SMIs) can be characterised as a "new type of third party endorsers who shape audience attitudes through blogs, tweets, and the use of other social media" (Freberg et al., 2011: 90).

Due to the rising importance of social media for strategic communication suggested by the ECM respondents for many years (see previous chapter), it can be expected that organisations are aware of SMIs and know how to deal with them. More specifically, concrete methods are needed to identify relevant influencers on the social web. Indicators like citation scores, linkages, centrality within thematic networks etc. are heavily discussed in social media marketing and measurement (e.g., Greve, 2015). Public relations scholars, however, have discussed this only sporadically (Gilin 2008; Freberg et al., 2011; Pang et al., 2016), which might indicate a lower awareness in the profession at hand.
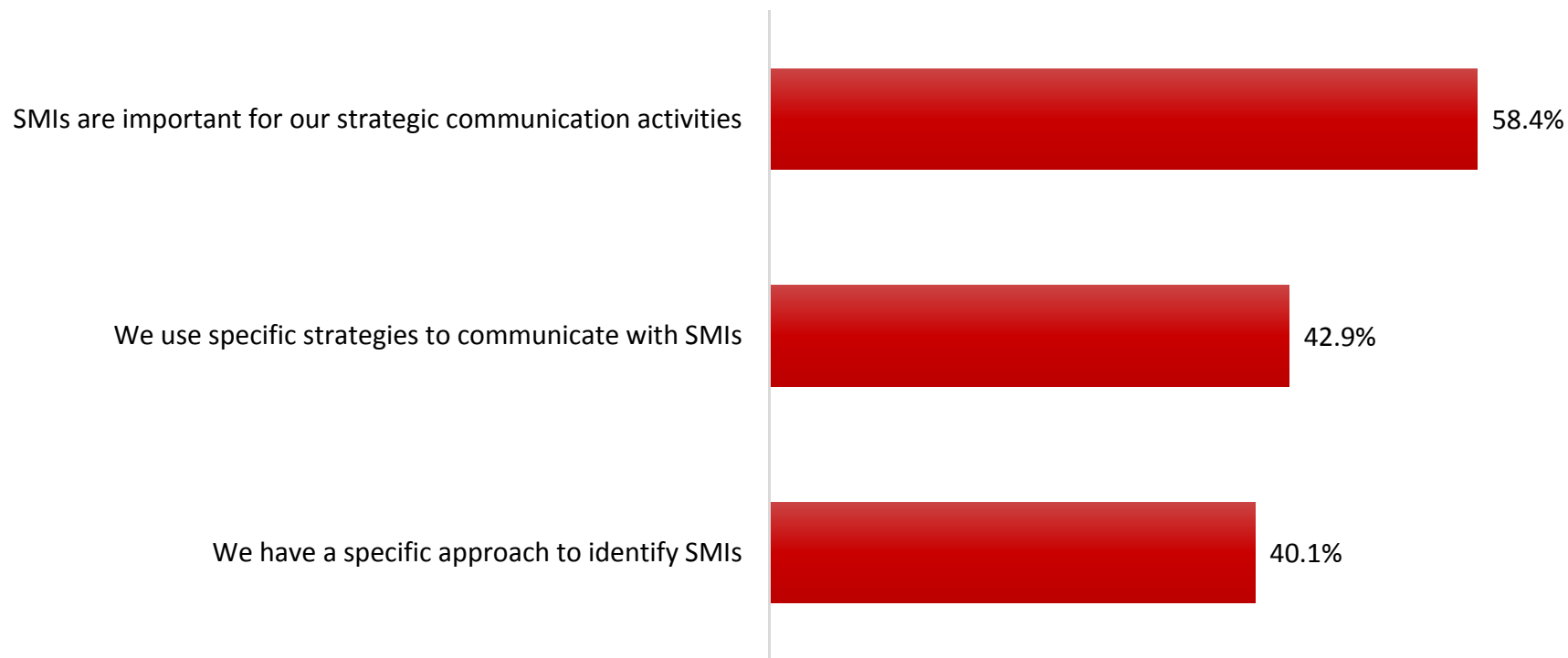
The empirical study shows that a majority of organisations across Europe (58.4 per cent) understands that social media influencers are important for their communication activities. But only a minority uses specific strategies to communicate with those opinion leaders (42.9 per cent) and even less have specific approaches to identify them (40.1 per cent). This indicates that some organisations employ a reactive strategy – they communicate with SMIs if they show up, but they do not track or approach them proactively. Consultancies and agencies are clearly ahead in this field, whereas only one quarter of the governmental organisations is prepared to identify and communicate with SMIs. There are statistically significant differences between the perceived importance and methods across key countries. But the overall assessment is quite similar – the new structures of opinion building are indeed a transnational phenomenon.

Which factors are important for identifying SMIs? The ECM 2016 shows that most communication professionals prefer traditional indicators already known from the offline world: the relevance of topics or issues covered by an opinion leader (rated important by 84.2 per cent of the respondents) and his/her personal reputation (82.1 per cent). These are complemented by two indicators which represent specific features of SMIs. 81.2 per cent state that qualitative outreach, e.g. content shared or forwarded by followers, are important to identify digital influencers. And 78.7 per cent support the idea of identifying the strength of their network position (i.e. characteristics and power of the people linked to multipliers) to determine relevant influencers. These measures can be tracked digitally and are necessary to deal with the topic at hand. Interestingly, six out of ten communicators believe that the number of followers (outreach) helps to identify opinion leaders. 35.1 per cent argue that the sheer volume of content published (productivity) points to the relevance of SMIs.

Thus, the overall picture emerges that many communication professionals have not fully grasped the concept of influence and opinion leadership in social networks. More knowledge and experience is needed to leverage the full potential of the digital sphere.

Many organisations recognise the relevance of social media influencers – but specific measures to identify and communicate with them are less common

Social media influencers (SMIs) "represent new types of independent third party endorsers who shape audience attitudes through blogs, tweets, and the use of other social media."

SMIs are important for our strategic communication activities — **58.4%**

We use specific strategies to communicate with SMIs — **42.9%**

We have a specific approach to identify SMIs — **40.1%**

Consultancies and agencies are clearly ahead when dealing with social media influencers

Joint stock companies

55.8%
38.6%
36.7%

Private companies

53.3%
40.9%
36.4%

Consultancies & Agencies

67.5%
54.4%
52.2%

23.7%
31.0%

27.6%

Governmental organisations

47.3%

Non-profit organisations

53.9%
33.4%

Legend:
- SMIs are important for our strategic communication activities
- We use specific strategies to communicate with SMIs
- We have a specific approach to identify SMIs
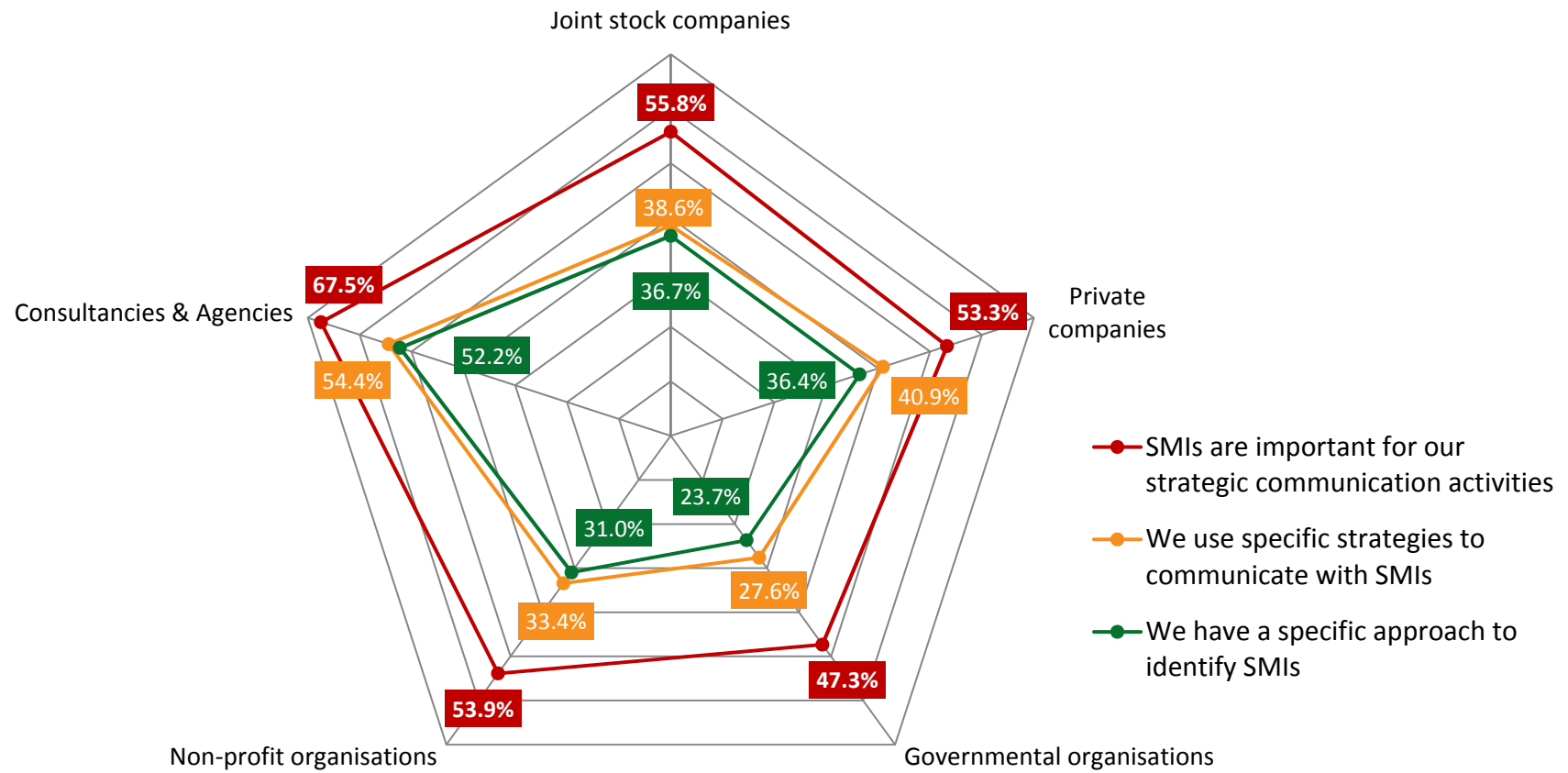
www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,710 PR professionals. Q 13: Social media influencers (SMIs) "represent new types of independent third party endorsers who shape audience attitudes through blogs, tweets, and the use of other social media." Please rate the following statements, thinking of your organisation/agency. Scale 1 (Strongly disagree) – 5 (Totally agree). Percentages: Frequency based on scale points 4-5. Highly significant differences for all items (chi-square test, $p \leq 0.01$).

Country-to-country assessment of social media influencers

Scale (Means):
(1) Strongly disagree –
(5) Totally agree

Legend:
- SMIs are important for our strategic communication activities **
- We use specific strategies to communicate with SMIs **
- We have a specific approach to identify SMIs **

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,356 PR professionals from 20 countries. Q 13: Social media influencers (SMIs) "represent new types of independent third party endorsers who shape audience attitud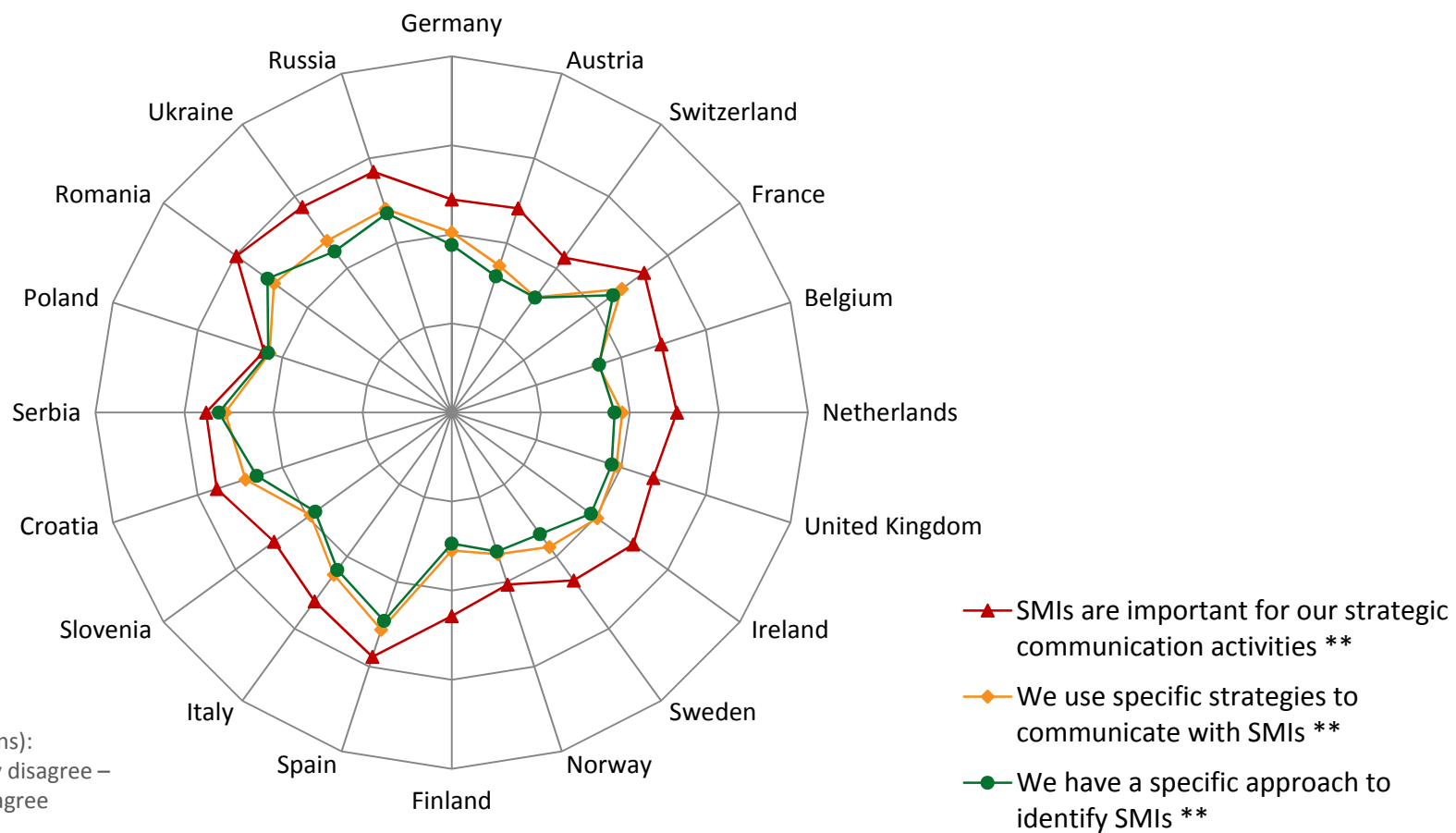es through blogs, tweets, and the use of other social media." Please rate the following statements, thinking of your organisation/agency. Scale 1 (Strongly disagree) – 5 (Totally agree). Mean values. ** Highly significant differences (ANOVA/ Scheffe post-hoc test, p ≤ 0.01).

Important factors for identifying social media influencers

Factor	Percentage
Relevance of topics/issues covered	84.2%
Personal reputation	82.1%
Qualitative outreach (content shared/forwarded by others)	81.2%
Network position (number, reputation and influence of people linked to an influencer)	78.7%
Reputation of the affiliated organisation	71.0%
Quantitative outreach (followers)	60.4%
Productivity (number of messages/content published)	35.1%
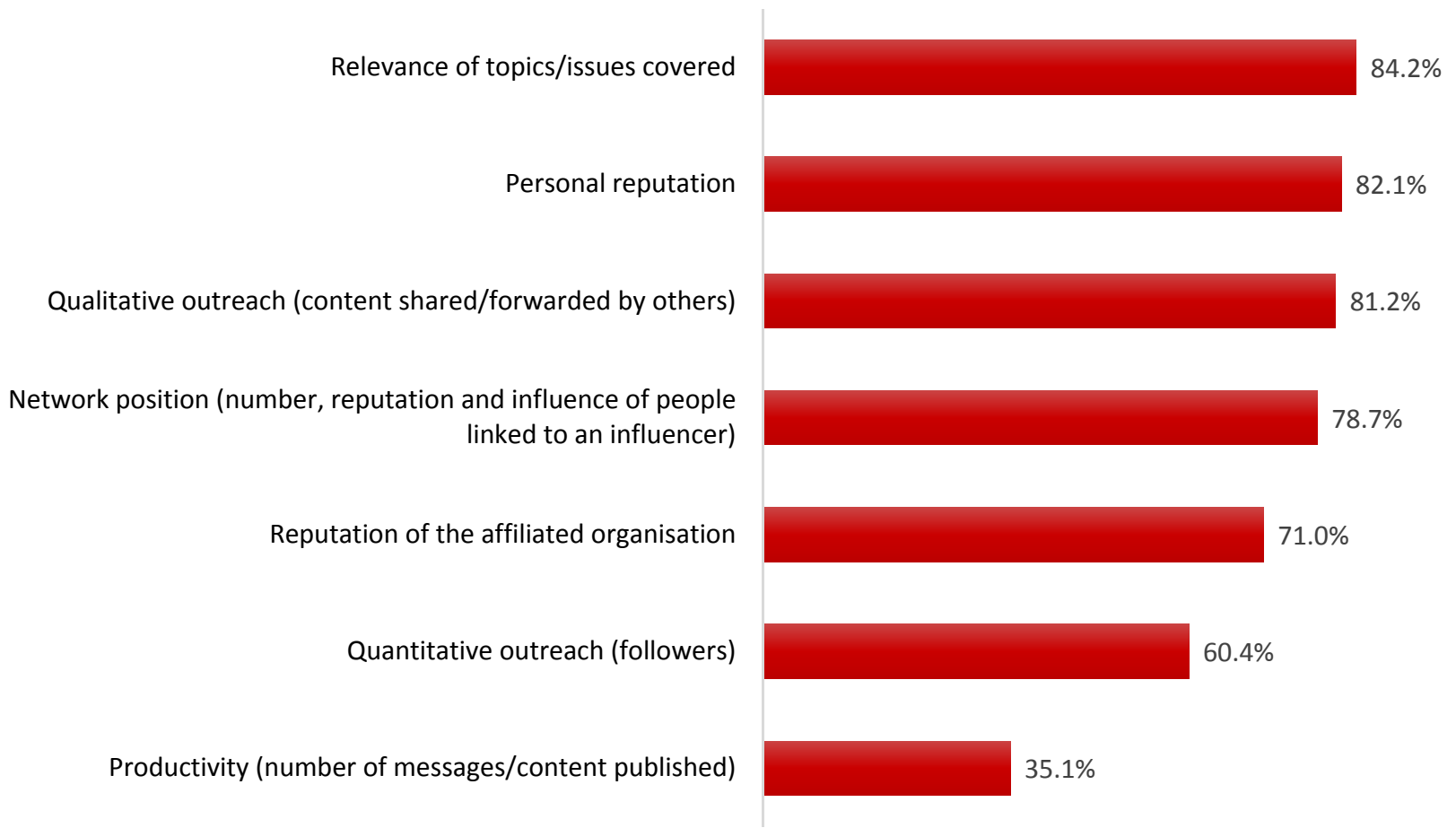
www.communicationmonitor.eu / Zerfass et al. 2016 / n min = 2,489 PR professionals. Q 14: In your opinion, how important are the following factors for identifying social media influencers which are truly relevant for an organisation? Scale 1 (Not important) – 5 (Very important). Percentages: Frequencies based on scale points 4-5.

Important indicators to identify SMIs in key countries across Europe

	Relevance of topics/issues covered	Network position	Productivity	Quantitative outreach	Qualitative outreach	Personal reputation	Reputation of the affiliated organisation
Germany	84.7%	76.7%	29.9%	62.0%	83.7%	83.6%	61.7%
Austria	84.6%	71.7%	28.3%	50.9%	84.9%	86.8%	64.2%
Switzerland	86.3%	79.2%	27.8%	55.0%	77.0%	75.8%	67.1%
France	86.8%	77.1%	40.2%	68.5%	89.1%	84.6%	73.3%
Belgium	89.9%	78.6%	21.5%	55.8%	78.6%	78.0%	71.5%
Netherlands	82.3%	78.8%	42.3%	60.8%	83.3%	77.1%	70.5%
United Kingdom	84.7%	73.8%	34.4%	59.7%	75.8%	77.5%	74.4%
Ireland	85.6%	77.3%	41.2%	57.3%	74.5%	85.9%	76.8%
Sweden	92.2%	79.4%	20.6%	49.0%	81.4%	79.8%	68.0%
Norway	80.4%	70.2%	19.6%	59.6%	78.6%	80.4%	74.1%
Finland	88.6%	77.4%	25.4%	58.4%	86.3%	75.0%	75.0%

Important indicators to identify SMIs in key countries across Europe

	Relevance of topics/issues covered	Network position	Productivity	Quantitative outreach	Qualitative outreach	Personal reputation	Reputation of the affiliated organisation
Spain	79.4%	83.9%	36.8%	57.8%	84.5%	84.4%	69.5%
Italy	84.1%	77.5%	30.7%	57.2%	72.3%	83.1%	68.7%
Slovenia	82.2%	82.2%	36.5%	65.3%	79.7%	84.7%	61.6%
Croatia	84.5%	78.4%	49.5%	70.5%	87.6%	87.5%	77.6%
Serbia	90.9%	83.6%	50.0%	72.7%	89.4%	86.6%	77.6%
Poland	66.0%	68.6%	34.0%	60.4%	73.1%	79.2%	60.8%
Romania	84.7%	81.4%	52.9%	68.7%	90.5%	82.1%	77.9%
Ukraine	83.3%	83.3%	38.1%	64.5%	78.3%	88.5%	71.2%
Russia	83.3%	81.5%	57.4%	59.3%	87.0%	94.3%	75.9%

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,138 PR professionals from 20 countries. Q 14: In your opinion, how important are the following factors for identifying social media influencers which are truly relevant for an organisation? Scale 1 (Not important) – 5 (Very important). Percentages: Frequency based on scale points 4-5.

Stakeholder engagement

Chapter overview

Engagement is a much-debated concept in today's organisations and society. It is often used in public relations and strategic communication. But a common understanding is missing; many explanations are merely smoke and mirrors. Practitioners in the field of social media occasionally use Facebook 'Likes' as an indicator for stakeholder engagement – often without being able to prove who clicked the button, why it was done, and whether the action was an expression of interest or just a habitus. Some scholars, on the other hand, define engagement normatively as "two-way, relational, give-and-take between organizations and stakeholders/publics with the intended goal of … making decisions that benefit all parties involved … and fostering a fully functioning society" (Taylor & Kent, 2014: 391).

Kang (2014) has concluded that the concept of public engagement lacks a sound definition and operationalisation. She and others, e.g. Macnamara (2016), have evaluated the interdisciplinary literature and made proposals for a multidimensional understanding of the construct.
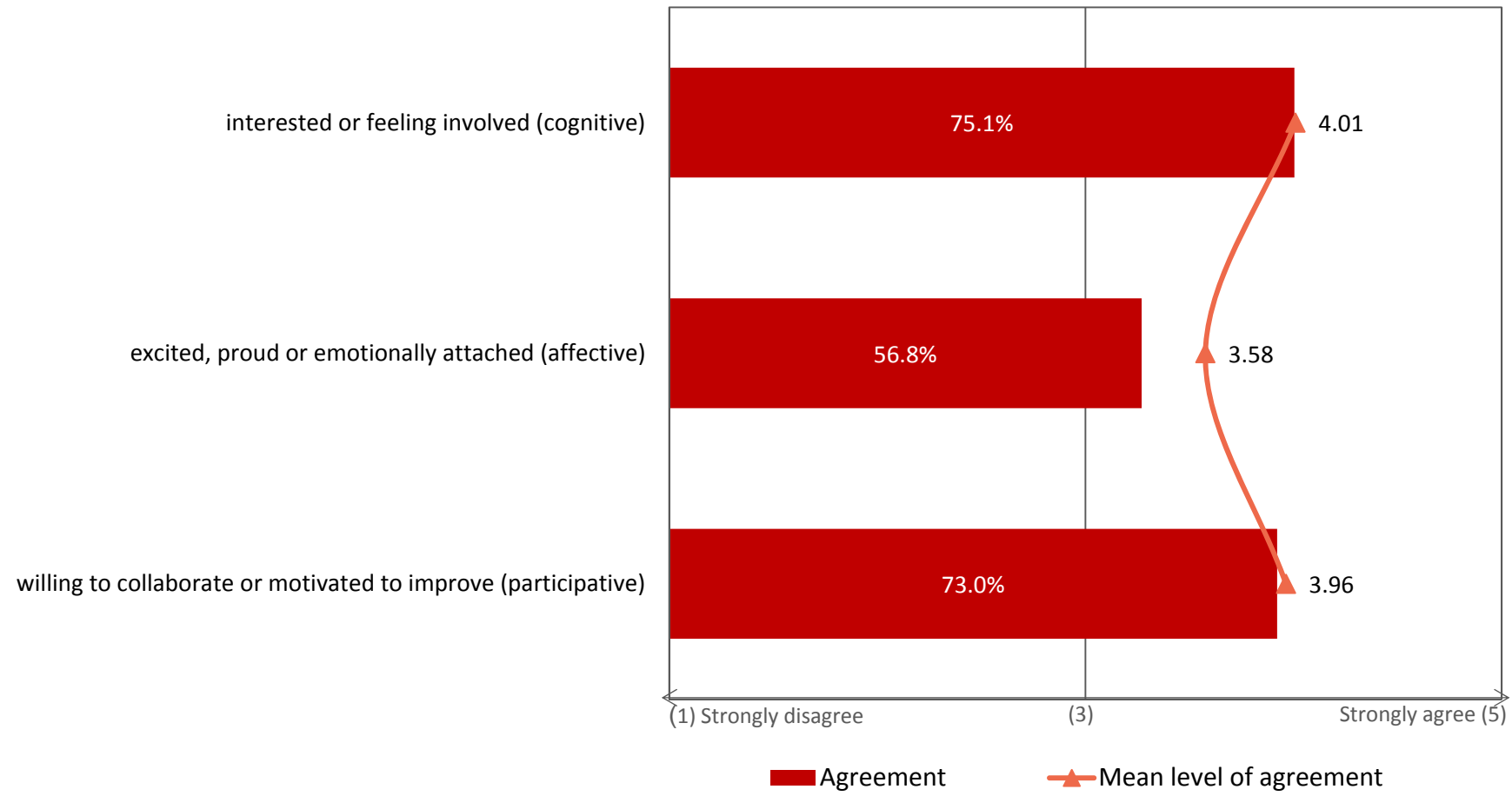
This study complements these efforts by exploring the comprehension of engagement among communication professionals. In a first step, professionals across Europe were asked what engagement means to them in general. The items presented stand for three stages of engagement: cognitive, affective and participative involvement (Macnamara, 2016: 40). Respondents preferred two views: for three out of four engagement means being interested or feeling involved (cognitive; 75.1 per cent) or being willing to collaborate and improve (participative; 73.0 per cent). Affective aspects, i.e. engagement as being excited, proud or emotionally attached, are relevant for a smaller group of communicators (56.8 per cent).

Secondly, participants of the study were asked how they would identify stakeholder engagement through communication and interaction towards their organisation or brand (or a client's organisation / brand). Again, indicators for cognitive and participative engagement – communicating actively with the organisation and giving feedback (67.0 per cent) and working together with the organisation (61.3 per cent) – are mentioned most often. Positive talk to third parties about an organisation, which indicates affective engagement, follows closely and was picked by 58.1 per cent of the respondents. Three other ways to identify engagement are less preferred. These include unidirectional communication activities (stakeholders informing themselves about an organisation) and action behaviour, e.g. becoming an institutionalised supporter or influencing decisions as a member of advisory committees. There are differences between various types of organisations, but the overall picture is rather consistent.

Overall, communication professionals seem to conceptualise engagement mostly as a communication activity. Emotional drivers and institutionalised interactions might be overlooked. The results confirm that there is a need to specify the buzzword 'engagement' to make it useful for practitioners. A sound operationalisation is needed if it shall be used as a goal for communication campaigns.

Communication professionals have a rather rational and action-oriented understanding of engagement in general

Engagement means being …

interested or feeling involved (cognitive)	75.1% — 4.01
excited, proud or emotionally attached (affective)	56.8% — 3.58
willing to collaborate or motivated to improve (participative)	73.0% — 3.96

(1) Strongly disagree   (3)   Strongly agree (5)

■ Agreement   ▲ Mean level of agreement

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,710 PR professionals. Q 10: Engagement is a much-debated concept in society and organisations today. What does it mean to you? Scale: 1 (Strongly disagree) – 5 (Strongly agree). Percentages: Frequencies based on scale points 4-5.

Stakeholder engagement is mostly conceptualised as a communication activity, but there is no agreement on how to identify such behaviour

Stakeholders show engagement, if they …

communicate actively with the organisation or give feedback (e.g. write e-mails or letters, like/comment on social media, call the service line, answer questionnaires)	67.0%
work together with the organisation (e.g. participate in customer groups or stakeholder dialogues; volunteer)	61.3%
talk to others positively about the organisation (e.g. share Facebook/Twitter posts, recommend brands, products or services)	58.1%
influence organisational decision-making (e.g. as member of advisory committees, boards)	39.5%
inform themselves about the organisation (e.g. view websites, follow on Facebook or Twitter, install apps, visit events, subscribe to magazines)	36.7%
become institutionalised supporters (e.g. as member of a brand community or fan club)	27.6%

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,710 PR professionals. Q 11: How would you identify external stakeholder engagement through communication and interaction towards your organisation/brand (or your client's organisation/brand)? Please pick up to three (3) of the most relevant items. Percentages: Frequency based on selection as Top-3 item.

Communication professionals use quite different ways to identify stakeholder engagement

Stakeholders show engagement, if they …

Cognitive		
Cognitive	communicate actively with the organisation or give feedback	67.0%
	inform themselves about the organisation	36.7%

Affective	talk to others positively about the organisation	58.1%
	become institutionalised supporters	27.6%

Participative	work together with the organisation	61.3%
	influence organisational decision-making	39.5%

Practitioners working in non-profit and governmental organisations perceive engagement more collaboratively than their colleagues

Stakeholders show engagement, if they …

communicate actively with the organisation or give feedback
- 65.0%
- 64.6%
- 66.8%
- 65.0%
- 69.9%

work together with the organisation
- 59.2%
- 58.2%
- 68.2%
- 67.5%
- 59.4%

talk to others positively about the organisation
- 64.1%
- 59.1%
- 56.3%
- 57.6%
- 55.3%

influence organisational decision-making
- 36.5%
- 37.9%
- 42.0%
- 39.9%
- 40.9%

inform themselves about the organisation
- 37.4%
- 40.9%
- 34.6%
- 35.6%
- 35.4%

become institutionalised supporters
- 29.3%
- 29.2%
- 22.5%
- 26.6%
- 28.0%

Legend:
- 🟥 Joint stock companies
- 🟦 Private Companies
- 🟧 Governmental organisations
- 🟩 Non-profit organisations
- ⬜ Consultancies & Agencies

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,710 PR professionals. Q 11: How would you identify external stakeholder engagement through communication and interaction towards your organisation/brand (or your client's organisation/brand)? Please pick up to three (3) of the most relevant items. Percentages: Frequency based on selection as Top-3 item.

Preferred indicators for identifying stakeholder engagement across Europe

	Cognitive		Affective		Participative	
	inform themselves about the organisation	communicate actively with the organisation or give feedback	talk to others positively about the organisation	become institutionalised supporters	work together with the organisation	influence organisational decision-making
Germany	33.5%	71.6%	53.4%	36.9%	55.1%	39.8%
Austria	51.8%	75.0%	48.2%	30.4%	58.9%	26.8%
Switzerland	37.1%	65.7%	63.4%	32.0%	56.0%	37.7%
France	36.0%	62.0%	58.0%	38.0%	55.0%	42.0%
Belgium	39.9%	65.0%	60.1%	27.3%	65.7%	35.7%
Netherlands	32.9%	60.0%	57.1%	27.1%	71.4%	40.7%
United Kingdom	37.3%	66.6%	63.1%	19.5%	69.0%	36.9%
Ireland	51.9%	65.4%	66.3%	17.3%	53.8%	34.6%
Sweden	46.4%	62.5%	66.1%	20.5%	55.4%	34.8%
Norway	31.3%	65.6%	56.3%	23.4%	59.4%	50.0%
Finland	39.3%	67.1%	70.7%	15.0%	72.9%	27.9%

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,356 PR professionals from 20 countries. Q 11: How would you identify external stakeholder engagement through communication and interaction towards your organisation/brand (or your client's organisation/brand)? Please pick up to three (3) of the most relevant items. Percentages: Frequency based on selection as Top-3 item.

Preferred indicators for identifying stakeholder engagement across Europe

	Cognitive		Affective		Participative	
	inform themselves about the organisation	communicate actively with the organisation or give feedback.	talk to others positively about the organisation	become institutionalised supporters	work together with the organisation	influence organisational decision-making
Spain	23.8%	61.0%	63.4%	41.3%	55.2%	48.3%
Italy	40.5%	58.9%	60.1%	23.9%	61.3%	44.8%
Slovenia	38.7%	81.3%	50.7%	21.3%	61.3%	40.0%
Croatia	37.7%	70.8%	46.2%	34.0%	60.4%	42.5%
Serbia	34.3%	71.4%	50.0%	41.4%	65.7%	25.7%
Poland	40.0%	83.3%	40.0%	11.7%	58.3%	48.3%
Romania	39.8%	69.3%	52.3%	22.7%	59.1%	36.4%
Ukraine	29.4%	61.8%	55.9%	30.9%	61.8%	41.2%
Russia	31.6%	73.7%	52.6%	28.1%	52.6%	52.6%

**Skills, knowledge
and competency
development**

Chapter overview

Staff competencies have been identified as a key driver of organisational success in dynamic and complex environments. Human resources experts suggest the need to assess and develop skills and knowledge with competency models (Stevens, 2014). Communication leaders have to take care that their teams acquire relevant competencies to deal with the requirements of communication across multiple channels, manage programs and campaigns, coach and enable other people, and help organisations to align with various stakeholders. To this end, previous research has identified three critical areas. Firstly, competencies in the growing field of social media are often lacking (Tench et al., 2013; Zerfass et al., 2013: 38-49; Macnamara et al., 2015: 34-41). Secondly, management and business qualifications need to be developed. Last but not least, only a minority of development needs for communicators are addressed through suitable training programs (Zerfass et al., 2012: 86-99).
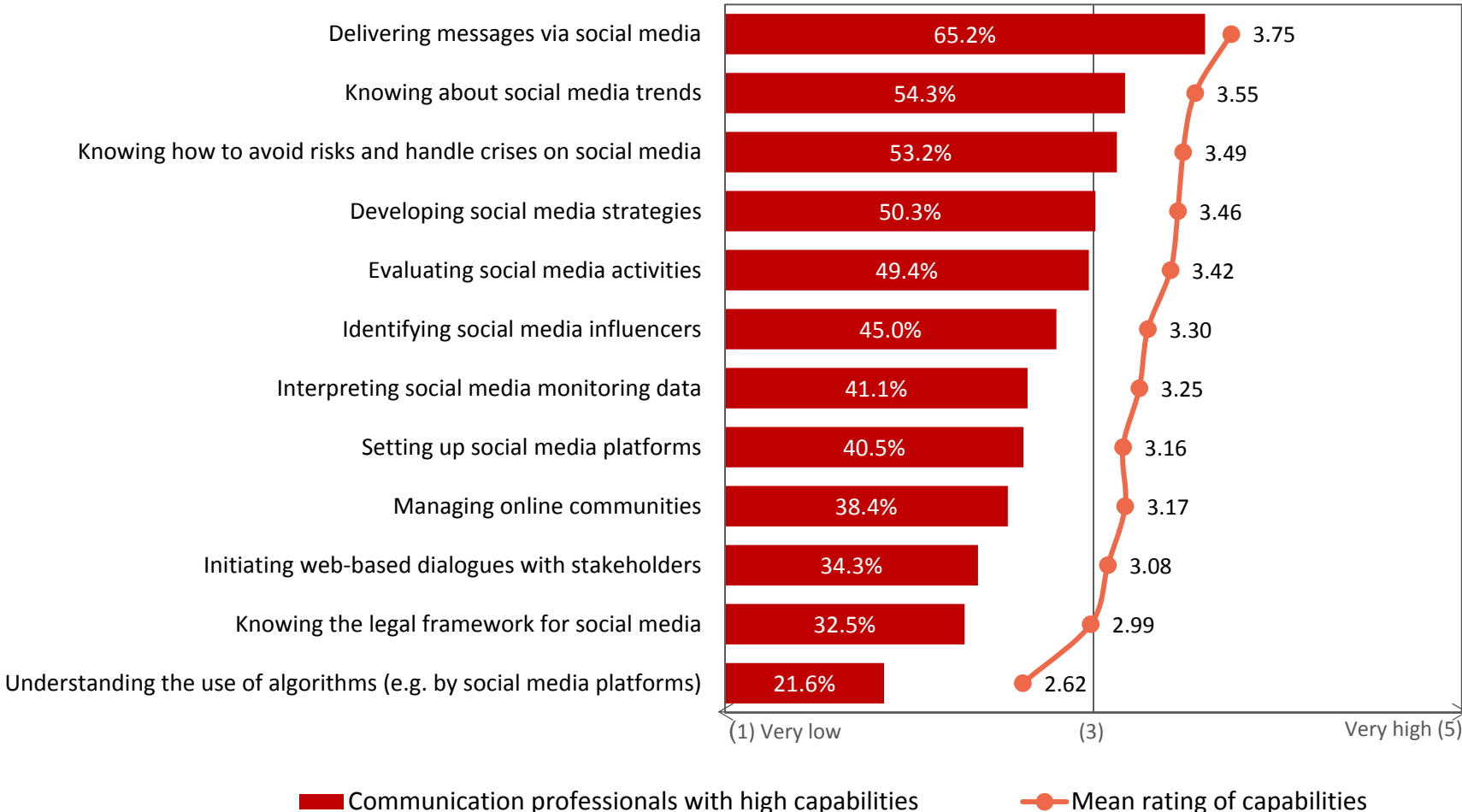
The ECM 2016 tracks the current situation across Europe based on a thorough understanding of competencies "as the mix of skills and knowledge held by a practitioner, which combine with personal attributes to produce effective professional behaviours" (Tench & Moreno, 2015: 44). A first important finding is the mediocre level of social media competencies. Only 65.2 per cent of the respondents report high capabilities for delivering messages via social media – which means that one third of the professionals have a low or average competency base in this area. A small majority believes that they understand social media trends, know how to avoid risks and are able to develop digital strategies. All other dimensions are less developed. This is especially true for approaches which use the full potential of new media: managing online communities (38.4 per cent report high capabilities), initiating web-based dialogues with stakeholders (34.3 per cent) and understanding the use of algorithms (21.6 per cent). There are significant differences depending on the age and gender of practitioners and the type of organisations. A comparison with previous ECM results (Zerfass et al., 2013: 40) shows that the average competency level has hardly grown. A stronger advancement was only reported for social media crisis prevention and management. The mean capability level here was 2.86 on a five-point scale three years earlier and is 3.49 now.

A similar picture emerges in the field of management competencies. Communication professionals are quite confident about their planning and positioning capabilities. Managing relationships and leading people or groups are also positively self-evaluated. Between 74.4 and 82.6 per cent of the practitioners agree that they have high capabilities in those four areas. Least developed are competencies for managing financial and human resources, establishing structures and processes, and performing control tasks. Approximately half of the sample is self-critical here.

When asked for their development and training needs, every second communicator mentions technical knowledge and technical skills. This is followed by business knowledge or skills and management knowledge or skills (marked by approximately one third). 23.6 per cent of the respondents need to develop their communication knowledge and 17.0 per cent want to enhance their communication skills. Interestingly, the latter one is the only area where organisations' training provision outstrips demand. Large or small gaps between development needs and opportunities have been identified for all other topics.

Employers tend to offer skills development, while practitioners rate knowledge support more important in each area. This should be reflected and adjusted – intelligent people development is indispensable for excellent communication departments and agencies.

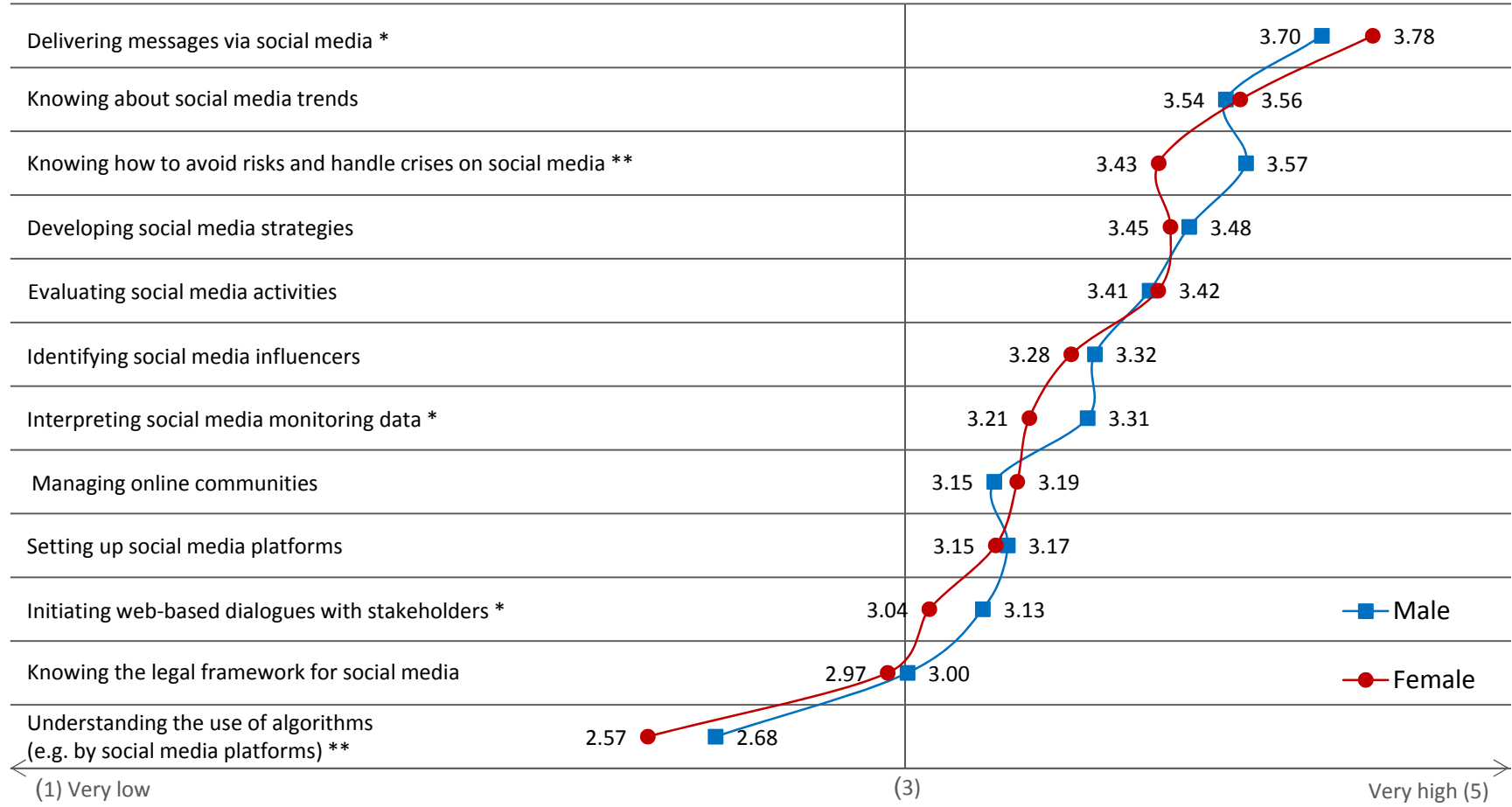# Social media capabilities of communication professionals in Europe

Capability	High capabilities	Mean rating
Delivering messages via social media	65.2%	3.75
Knowing about social media trends	54.3%	3.55
Knowing how to avoid risks and handle crises on social media	53.2%	3.49
Developing social media strategies	50.3%	3.46
Evaluating social media activities	49.4%	3.42
Identifying social media influencers	45.0%	3.30
Interpreting social media monitoring data	41.1%	3.25
Setting up social media platforms	40.5%	3.16
Managing online communities	38.4%	3.17
Initiating web-based dialogues with stakeholders	34.3%	3.08
Knowing the legal framework for social media	32.5%	2.99
Understanding the use of algorithms (e.g. by social media platforms)	21.6%	2.62

(1) Very low   (3)   Very high (5)

■ Communication professionals with high capabilities   ●— Mean rating of capabilities

Digital natives report significantly higher social media skills and knowledge

	29 or younger	30 - 39	40 - 49	50 - 59	60 or older	Overall
Delivering messages via social media **	4.03	3.85	3.69	3.57	3.30	3.75
Knowing about social media trends **	3.81	3.62	3.47	3.46	3.29	3.55
Knowing how to avoid risks and handle crises on social media **	3.59	3.52	3.46	3.44	3.36	3.49
Developing social media strategies **	3.66	3.53	3.40	3.34	3.18	3.46
Evaluating social media activities **	3.69	3.54	3.33	3.27	3.06	3.42
Identifying social media influencers **	3.64	3.41	3.17	3.13	3.05	3.30
Interpreting social media monitoring data **	3.50	3.38	3.14	3.11	2.99	3.25
Managing online communities **	3.56	3.29	3.04	3.00	2.86	3.17
Setting up social media platforms **	3.58	3.34	3.03	2.87	2.79	3.16
Initiating web-based dialogues with stakeholders **	3.33	3.16	3.00	2.94	2.93	3.08
Knowing the legal framework for social media	3.00	2.99	2.97	3.03	2.88	2.99
Understanding the use of algorithms (e.g. by social media platforms) **	2.86	2.77	2.48	2.47	2.47	2.62

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,675 PR professionals. Q 15: How would you rate your personal capabilities in the following areas? Scale 1 (Very low) – 5 (Very high). Mean values. Highly significant differences (Pearson product-moment correlation based on age as metric variable, p ≤ 0.01).

Online skills of male and female practitioners differ in various dimensions

Dimension	Female	Male
Delivering messages via social media *	3.78	3.70
Knowing about social media trends	3.56	3.54
Knowing how to avoid risks and handle crises on social media **	3.43	3.57
Developing social media strategies	3.45	3.48
Evaluating social media activities	3.42	3.41
Identifying social media influencers	3.28	3.32
Interpreting social media monitoring data *	3.21	3.31
Managing online communities	3.19	3.15
Setting up social media platforms	3.15	3.17
Initiating web-based dialogues with stakeholders *	3.04	3.13
Knowing the legal framework for social media	2.97	3.00
Understanding the use of algorithms (e.g. by social media platforms) **	2.57	2.68

(1) Very low   (3)   Very high (5)

88

Social media capabilities in different organisations:
non-profits and private companies are ahead of joint-stock companies

	Joint stock companies		Private companies		Governmental organisations		Non-profit organisations		Consultancies & Agencies	
	%	M	%	M	%	M	%	M	%	M
Delivering messages via social media **	57.9%	3.60	65.1%	3.75	66.9%	3.77	73.5%	3.93	65.7%	3.76
Knowing about social media trends	51.5%	3.51	54.2%	3.55	53.4%	3.47	52.4%	3.53	56.7%	3.61
Knowing how to avoid risks and handle crises on social media	52.4%	3.47	53.0%	3.48	49.0%	3.38	52.7%	3.50	55.3%	3.53
Developing social media strategies **	47.4%	3.34	47.4%	3.43	45.8%	3.37	52.5%	3.50	54.0%	3.55
Evaluating social media activities	48.3%	3.38	51.9%	3.47	44.0%	3.32	48.3%	3.38	50.9%	3.46
Identifying social media influencers **	37.2%	3.13	45.8%	3.27	38.3%	3.13	38.0%	3.22	53.2%	3.48
Interpreting social media monitoring data *	40.5%	3.21	41.3%	3.27	34.4%	3.08	41.6%	3.27	43.4%	3.31
Managing online communities *	35.0%	3.11	43.9%	3.26	34.1%	3.05	35.8%	3.14	39.8%	3.22
Setting up social media platforms *	37.2%	3.08	43.2%	3.27	39.3%	3.13	47.5%	3.33	39.1%	3.11
Initiating web-based dialogues with stakeholders *	29.3%	2.98	34.6%	3.02	30.8%	2.99	36.4%	3.11	37.4%	3.18
Knowing the legal framework for social media	34.0%	3.05	33.6%	2.97	35.5%	3.02	24.7%	2.82	32.7%	3.00
Understanding the use of algorithms (e.g. by social media platforms)	20.3%	2.60	22.4%	2.65	17.5%	2.49	21.3%	2.57	23.4%	2.67

Management capabilities: communication professionals are self-confident in planning, positioning and collaborating; but less in terms of finances
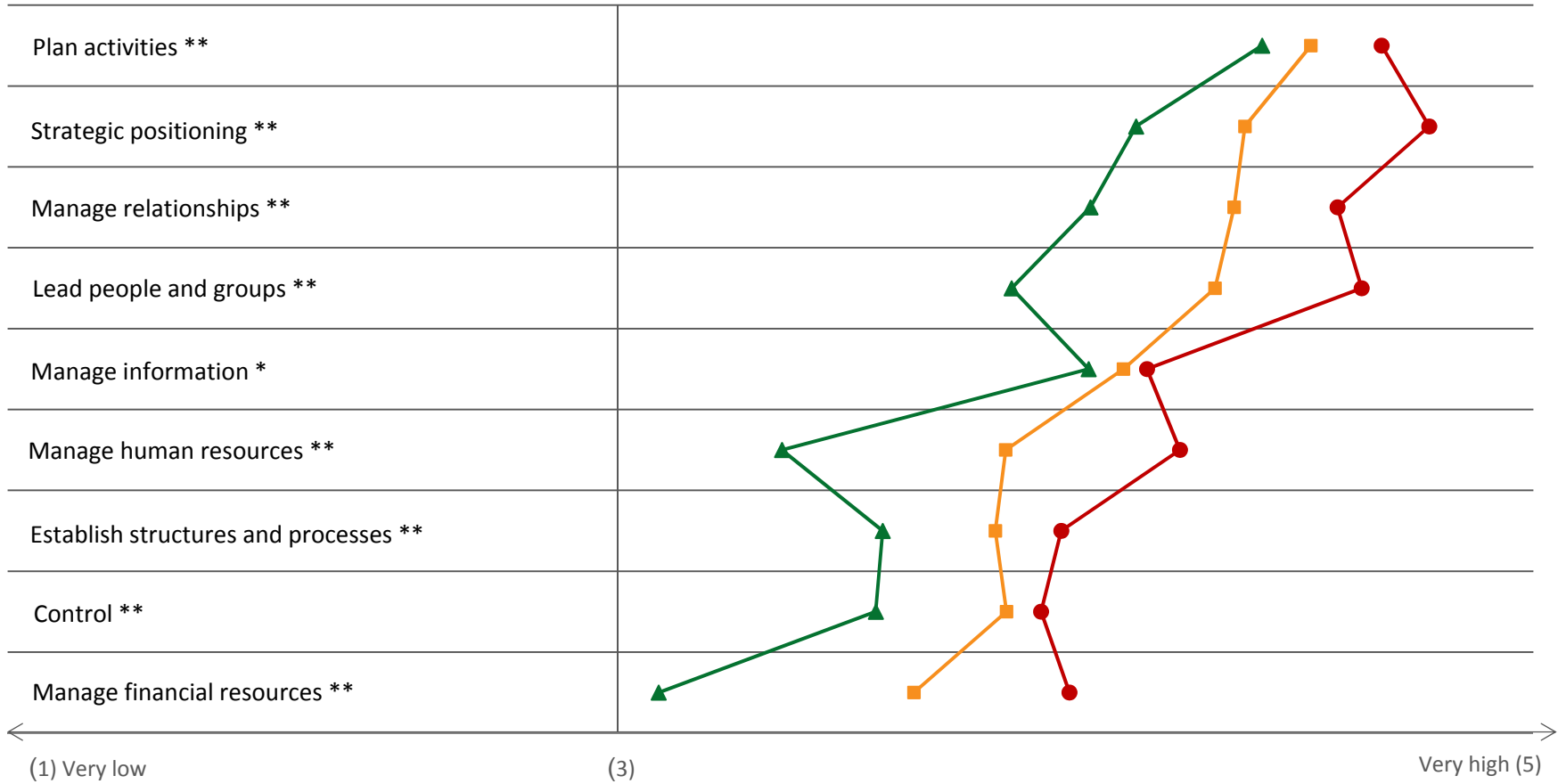
Capability	Communication professionals with high capabilities	Mean rating of capabilities
Plan activities	82.6%	4.16
Strategic positioning	78.7%	4.09
Manage relationships	74.5%	4.01
Lead people and groups	74.4%	3.98
Manage information	68.3%	3.83
Manage human resources	58.5%	3.64
Control	56.5%	3.60
Establish structures and processes	55.1%	3.60
Manage financial resources	49.6%	3.46

(1) Very low — (3) — Very high (5)

■ Communication professionals with high capabilities   ▲ Mean rating of capabilities

90

Overall level of management capabilities in different countries

Significant different management capabilities across ranks and hierarchies

Plan activities **
Strategic positioning **
Manage relationships **
Lead people and groups **
Manage information *
Manage human resources **
Establish structures and processes **
Control **
Manage financial resources **

(1) Very low   (3)   Very high (5)

▲— Team member / Consultant   ■— Team leader / Unit leader   ●— Head of communication / Agency CEO

Different competency profiles for male and female professionals

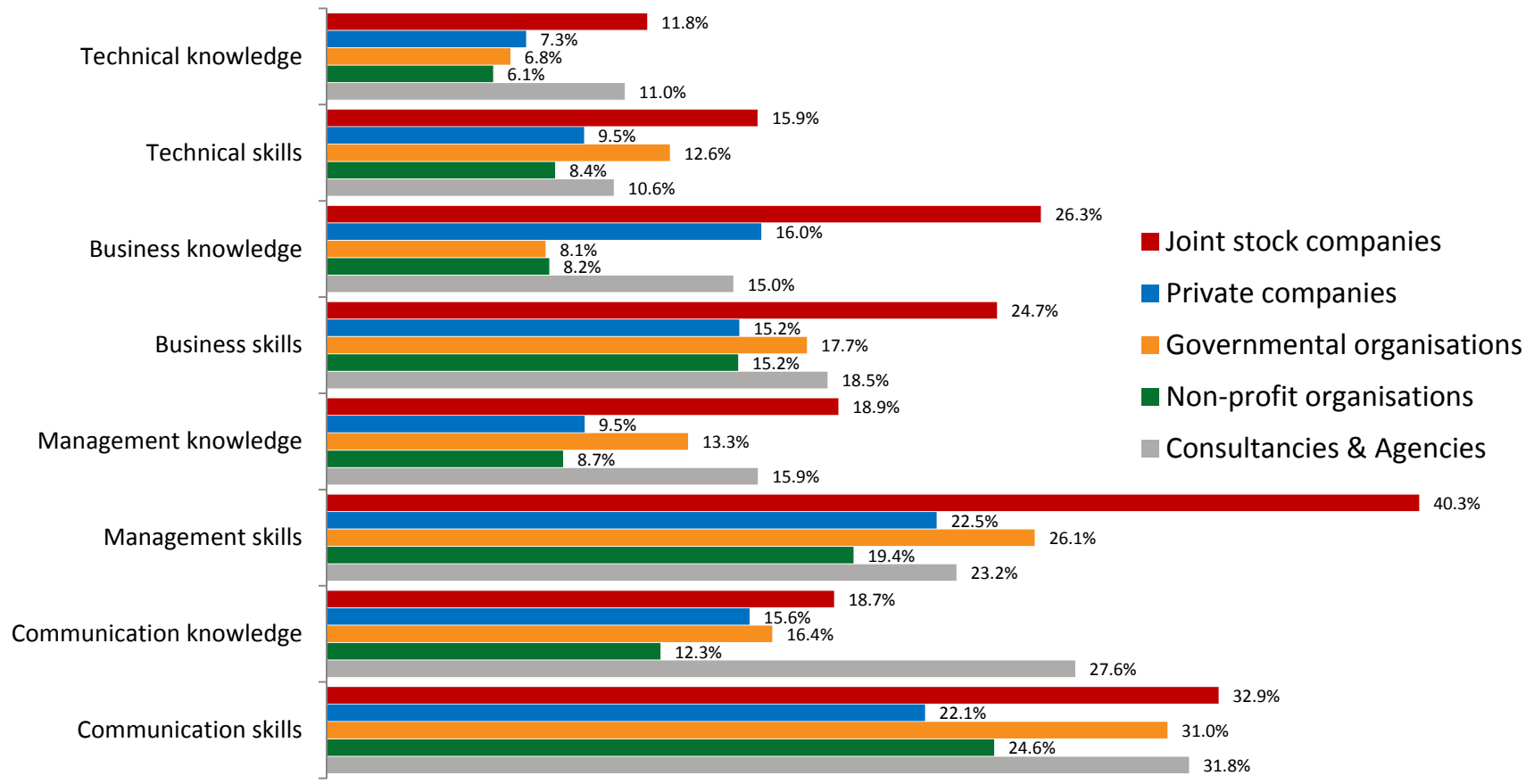|		
Plan activities **		
Strategic positioning **		
Manage relationships		
Lead people and groups		
Manage information		
Manage human resources		
Establish structures and processes *		■ Male
Control *		● Female
Manage financial resources		

(1) Very low   (3)   Very high (5)

Development needs and training: communication professionals report a huge necessity to build knowledge and limited offerings by their employers
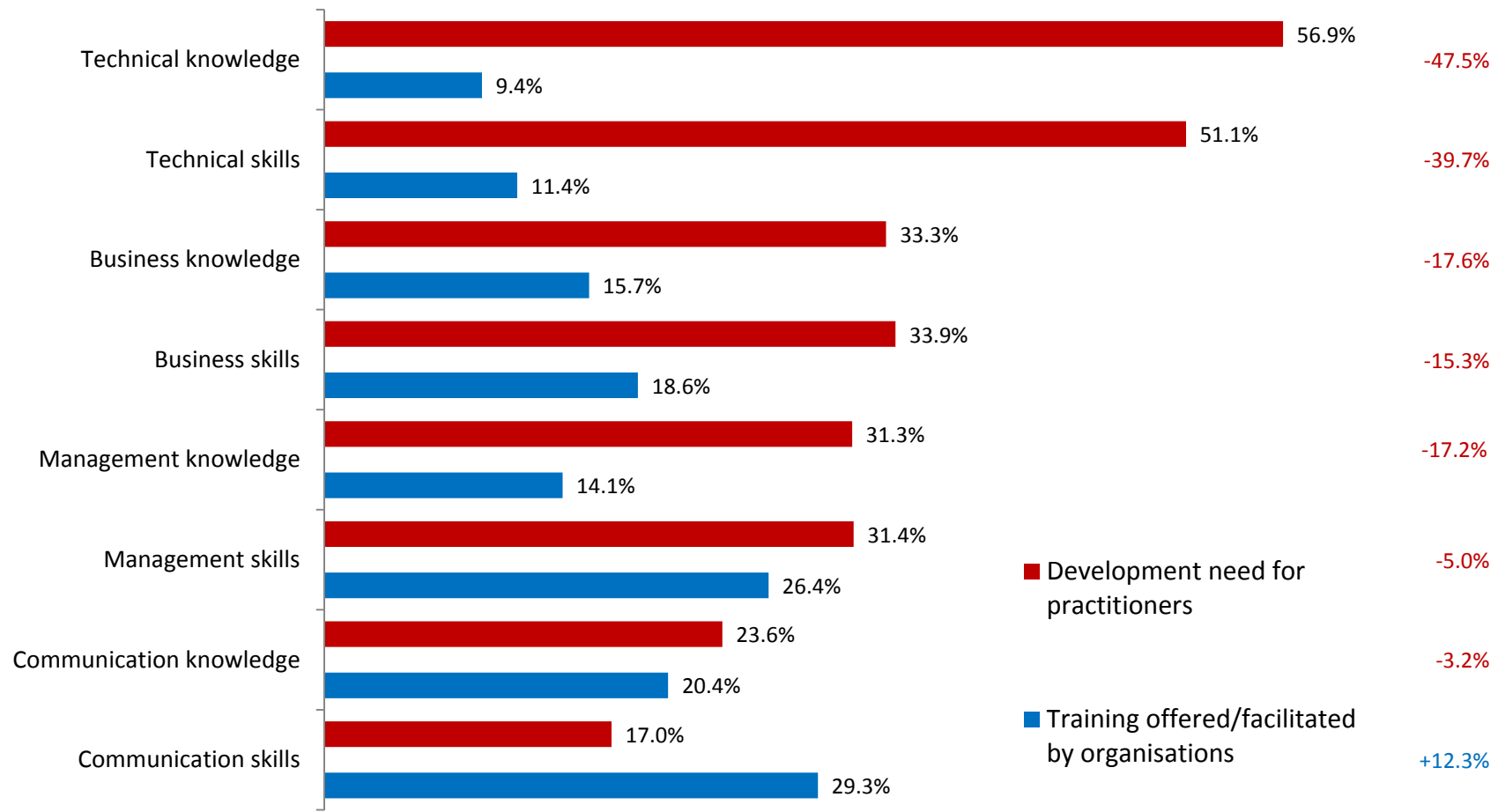
Technical knowledge
- Development need for practitioners: 56.9%
- Training offered/facilitated by organisations: 9.4%
- -47.5%

Technical skills
- Development need for practitioners: 51.1%
- Training offered/facilitated by organisations: 11.4%
- -39.7%

Business knowledge
- Development need for practitioners: 33.3%
- Training offered/facilitated by organisations: 15.7%
- -17.6%

Business skills
- Development need for practitioners: 33.9%
- Training offered/facilitated by organisations: 18.6%
- -15.3%

Management knowledge
- Development need for practitioners: 31.3%
- Training offered/facilitated by organisations: 14.1%
- -17.2%

Management skills
- Development need for practitioners: 31.4%
- Training offered/facilitated by organisations: 26.4%
- -5.0%

Communication knowledge
- Development need for practitioners: 23.6%
- Training offered/facilitated by organisations: 20.4%
- -3.2%

Communication skills
- Development need for practitioners: 17.0%
- Training offered/facilitated by organisations: 29.3%
- +12.3%

Legend:
- ■ Development need for practitioners
- ■ Training offered/facilitated by organisations

94

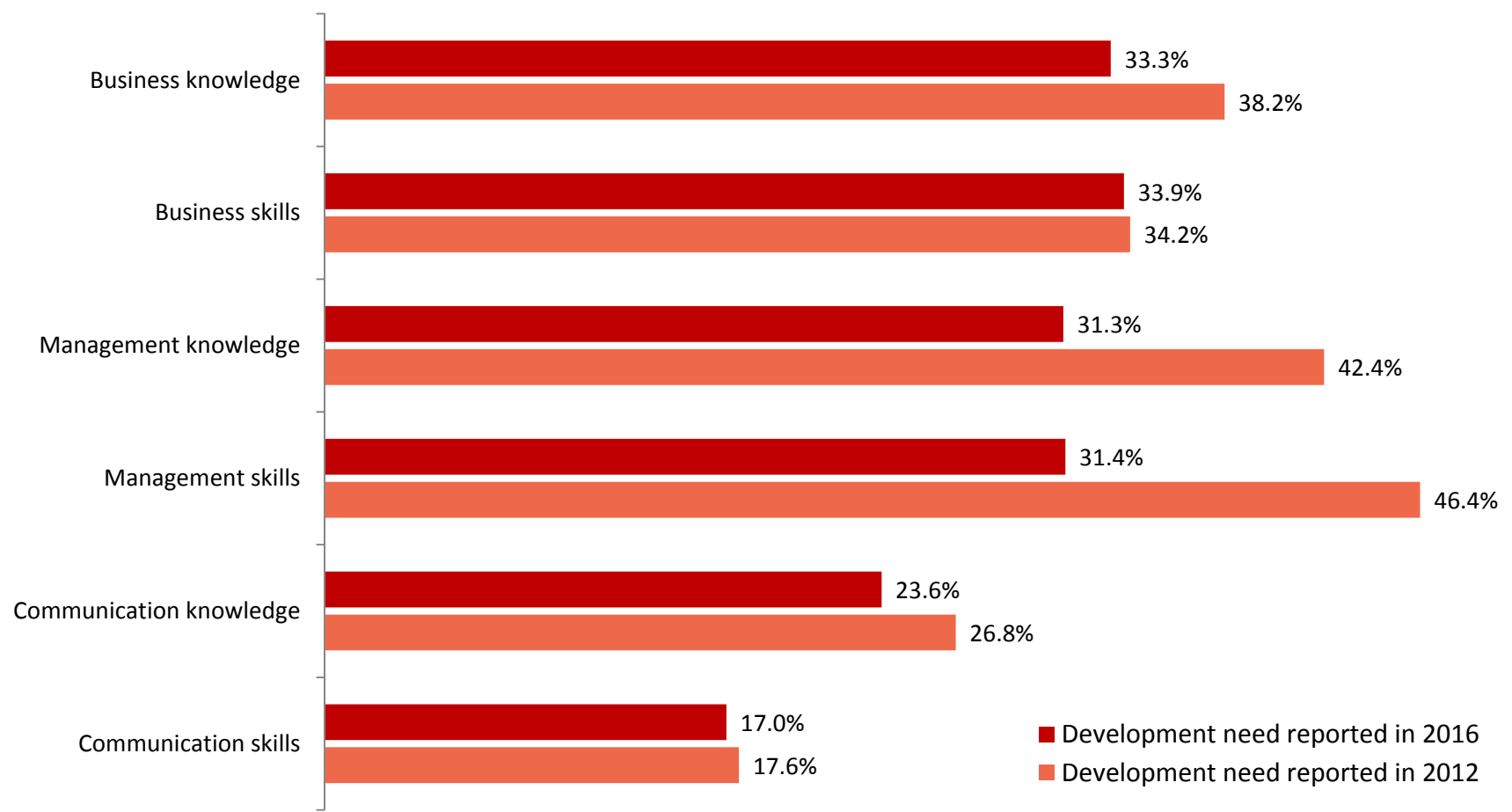# Personnel development differs significantly between various organisations
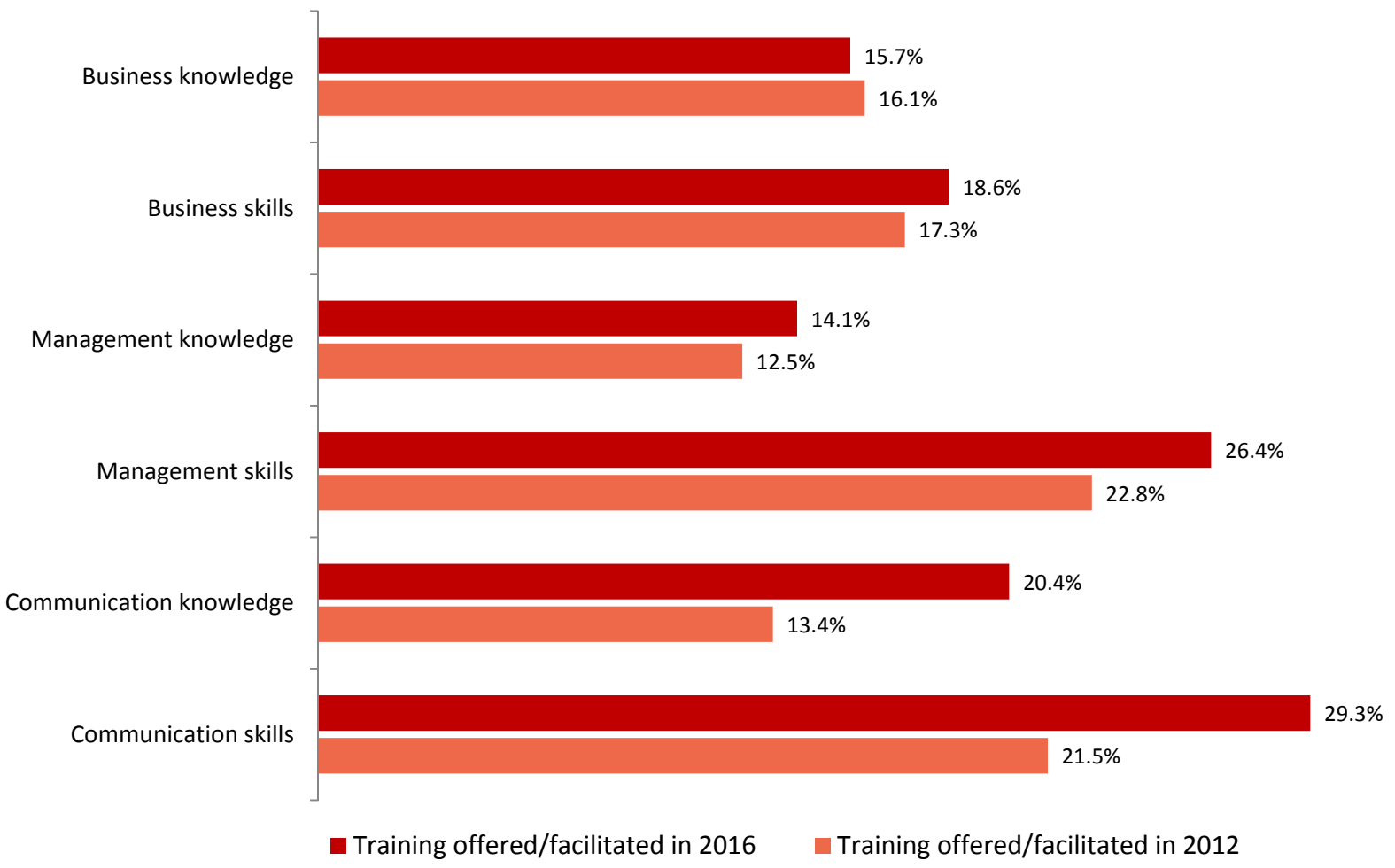
Training offered/facilitated by organisations for...

Technical knowledge
- Joint stock companies: 11.8%
- Private companies: 7.3%
- Governmental organisations: 6.8%
- Non-profit organisations: 6.1%
- Consultancies & Agencies: 11.0%

Technical skills
- Joint stock companies: 15.9%
- Private companies: 9.5%
- Governmental organisations: 12.6%
- Non-profit organisations: 8.4%
- Consultancies & Agencies: 10.6%

Business knowledge
- Joint stock companies: 26.3%
- Private companies: 16.0%
- Governmental organisations: 8.1%
- Non-profit organisations: 8.2%
- Consultancies & Agencies: 15.0%

Business skills
- Joint stock companies: 24.7%
- Private companies: 15.2%
- Governmental organisations: 17.7%
- Non-profit organisations: 15.2%
- Consultancies & Agencies: 18.5%

Management knowledge
- Joint stock companies: 18.9%
- Private companies: 9.5%
- Governmental organisations: 13.3%
- Non-profit organisations: 8.7%
- Consultancies & Agencies: 15.9%

Management skills
- Joint stock companies: 40.3%
- Private companies: 22.5%
- Governmental organisations: 26.1%
- Non-profit organisations: 19.4%
- Consultancies & Agencies: 23.2%

Communication knowledge
- Joint stock companies: 18.7%
- Private companies: 15.6%
- Governmental organisations: 16.4%
- Non-profit organisations: 12.3%
- Consultancies & Agencies: 27.6%

Communication skills
- Joint stock companies: 32.9%
- Private companies: 22.1%
- Governmental organisations: 31.0%
- Non-profit organisations: 24.6%
- Consultancies & Agencies: 31.8%

Legend:
- Joint stock companies
- Private companies
- Governmental organisations
- Non-profit organisations
- Consultancies & Agencies

www.communicationmonitor.eu / Zerfass et al. 2016 / n ^{min} = 2,572 PR professionals. Q 17: Thinking of yourself, your current capabilities and your future development, which of the following skills and knowledge areas do you believe are in need of developing? My organisation offers / facilitates training. Highly significant differences for all items (chi-square test, p ≤ 0.01).

Practitioners report less need for personal development than four years ago

Category	Development need reported in 2016	Development need reported in 2012
Business knowledge	33.3%	38.2%
Business skills	33.9%	34.2%
Management knowledge	31.3%	42.4%
Management skills	31.4%	46.4%
Communication knowledge	23.6%	26.8%
Communication skills	17.0%	17.6%

Organisations offer more training programs for communicators today

Skill/Knowledge Area	Training offered/facilitated in 2016	Training offered/facilitated in 2012
Business knowledge	15.7%	16.1%
Business skills	18.6%	17.3%
Management knowledge	14.1%	12.5%
Management skills	26.4%	22.8%
Communication knowledge	20.4%	13.4%
Communication skills	29.3%	21.5%

■ Training offered/facilitated in 2016   ■ Training offered/facilitated in 2012

www.communicationmonitor.eu / Zerfass et al. 2016 / n ^{min} = 2,572 PR professionals (Q 17); Zerfass et al. 2012 / n ^{min} = 2,163 PR professionals (Q 20).
Q: Thinking of yourself, your current capabilities and your future development, which of the following skills and knowledge areas do you believe are in need of developing? Does your organisation already offer training programmes in these fields?

Salaries

Chapter overview

The ECM 2016, like previous editions, provides an overview of annual salaries for communication professionals in Europe. Results are based on a large sample of up to 2,293 professionals who agreed to disclose their personal income. Nevertheless, the data is only a snapshot. Changes between years might be related to a rising or declining recognition of the profession as well as to overall economic developments and to variations in the composition of respondents in the samples.

In 2016, almost every tenth communicator surveyed earns more than €150,000 base salary per year (9.6 per cent). But only a very small group (1.8 per cent) makes more than €300,000. At the other end of the scale, one out of five (20.9 per cent) earns less than €30,000 per year. These figures have to be put into context. The average annual income in the 20 key countries analysed in detail for this study spreads between €5,900 (Romania) and €57,000 (Switzerland) (EUROSTAT, 2016a). This explains why nearly three out of four Romanian communication professionals fall into the lowest band of up to €30,000 per year. However, 26.2 per cent earn more and five time the average salary in their country. In Switzerland, on the other hand, nearly every communicator is on the sunny side of the income stream: 96.7 per cent earn more than €60,000 per year. Communication professionals are comparatively well off in economic terms, although the income spread within single countries and across Europe is quite broad.

A comparison of annual salaries over time has to be related to hierarchical positions. Quite interestingly, the portion of communication heads and agency CEOs with an annual income over €100,000 is relatively stable since 2009 (between 13.4 and 18.4 per cent). Longitudinal data also shows that there is a stable portion earning the same without being at the top of the hierarchy (up to 4.7 per cent). This is an indicator for bright career perspectives for specialists and mid-level leaders, not only for chief communication officers.

The data reveals a clear gender divide. Salaries reported by female practitioners are lower compared to male communicators, both for top positions and other hierarchical levels. There are 23.1 per cent male communication heads and agency CEOs who make more than €150,000, but only 13.8 per cent of female leaders in the same salary band. There are also 30.6 per cent women compared to 20.4 per cent men who earn less than €30,000 on the top level of the hierarchy. Both gaps are lower than in previous studies (Zerfass et al. 2015: 191).

Again, the data and the underlying discussion about a gender pay gap in public relations (Tench & Laville, 2014) has to be mirrored with overall labour statistics. These show that a pay gap is sadly a reality across all industries in Europe. In 2014, women earned 16.1 per cent less than men in the European Union (EU-28) and 16.5 per cent in the Euro area (EA-18). However, the gender pay gap varied strongly. It was relatively low in Slovenia (2.9 per cent), Italy (6.5 per cent) and Poland (7.7 per cent), but quite high in Austria (22.9 per cent), Germany (21.6 per cent) and Spain (18.8 per cent), to name just a few examples (EUROSTAT 2016b). This should be taken into account when interpreting the empirical insights of this study for communication professionals.
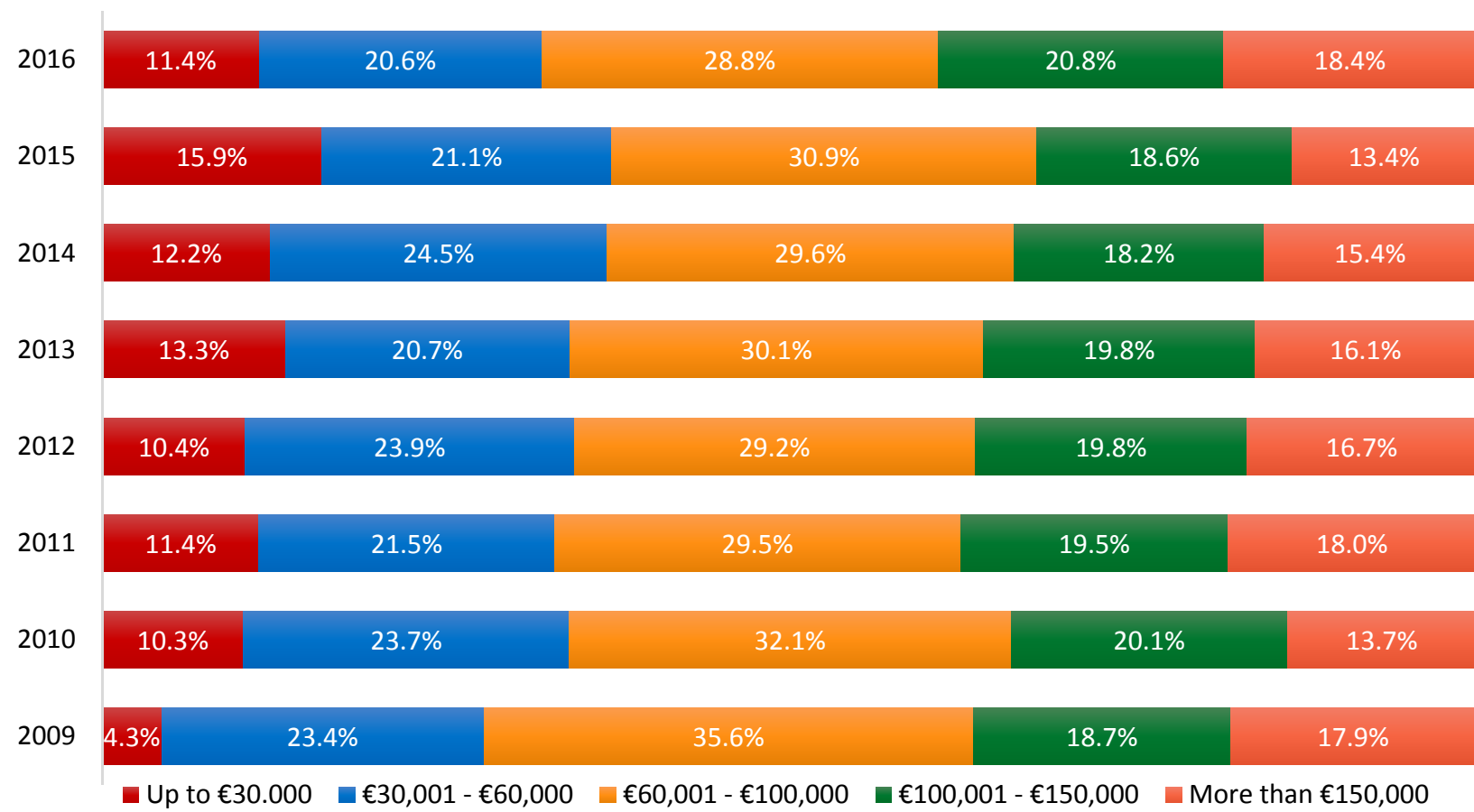
Generally, joint stock and private companies pay better than non-profit and governmental organisations. Most respondents reporting a low annual income work in consultancies and agencies. But agency people are also well represented in higher salary bands. This supports the claim that working for a consultancy is financially less rewarding for newcomers and mid-level professionals, but on the positive side higher ranks often get very attractive compensation packages.

Basic annual salary of communication practitioners in Europe 2016

1.8% > €300.000

€200,001 - €300,000, **2.9%**

€150,001 - €200,000, **4.9%**

€125,001 - €150,000, **4.8%**

up to €30,000, **20.9%**

€100,001 - €125,000, **8.3%**

€90,001 - €100,000, **5.3%**

€30,001 - €40,000, **12.1%**

€80,001 - €90,000, **5.1%**

€70,001 - €80,000, **6.3%**

€40,001 - €50,000, **11.4%**

€60,001 - €70,000, **7.2%**
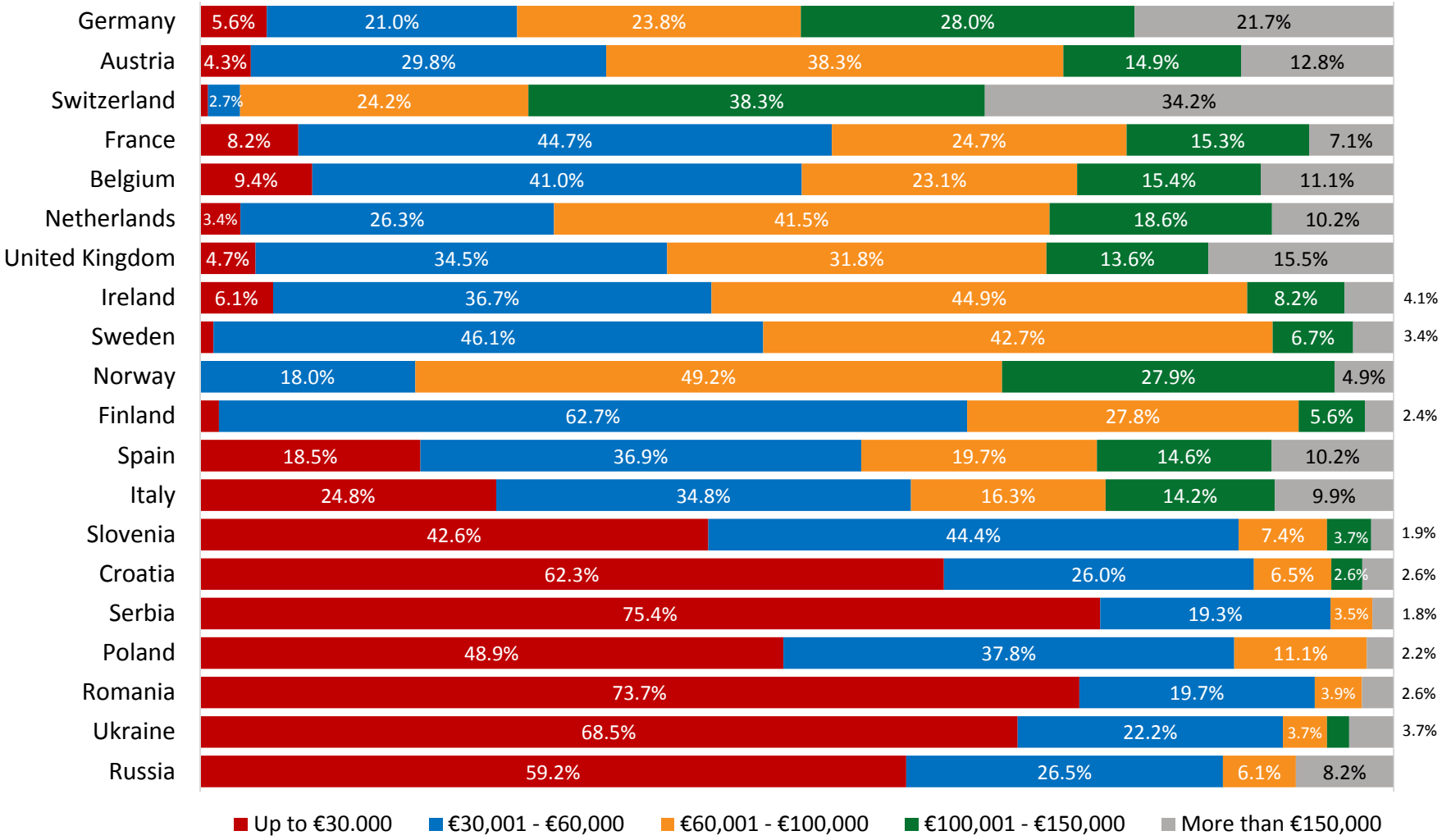
€50,001 - €60,000, **8.8%**

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,293 PR professionals. Q 32: In which of the following bands does your basic annual salary fall?
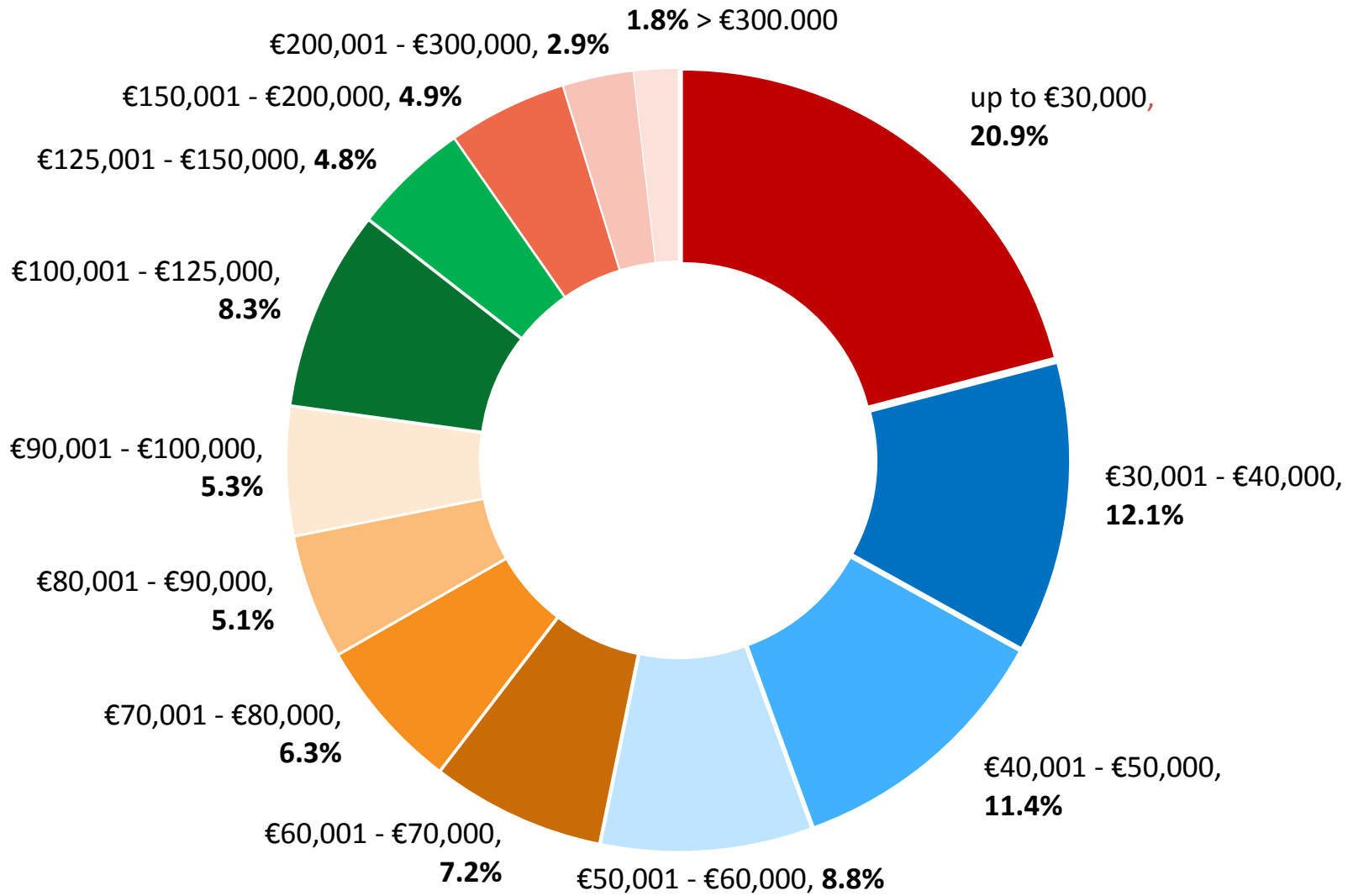
Development of salaries of top-level communicators

Basic annual salaries (heads of communication / agency CEOs)

Year	Up to €30.000	€30,001 - €60,000	€60,001 - €100,000	€100,001 - €150,000	More than €150,000
2016	11.4%	20.6%	28.8%	20.8%	18.4%
2015	15.9%	21.1%	30.9%	18.6%	13.4%
2014	12.2%	24.5%	29.6%	18.2%	15.4%
2013	13.3%	20.7%	30.1%	19.8%	16.1%
2012	10.4%	23.9%	29.2%	19.8%	16.7%
2011	11.4%	21.5%	29.5%	19.5%	18.0%
2010	10.3%	23.7%	32.1%	20.1%	13.7%
2009	4.3%	23.4%	35.6%	18.7%	17.9%

■ Up to €30.000   ■ €30,001 - €60,000   ■ €60,001 - €100,000   ■ €100,001 - €150,000   ■ More than €150,000

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 860 heads of communication and agency CEOs (Q 32); Zerfass et al. 2015 / n = 828 (Q 33); Zerfass et al. 2014 / n = 966 (Q 41); Zerfass et al. 2013 / n = 970 (Q 17); Zerfass et al. 2012 / n = 798 (Q 39); Zerfass et al. 2011 / n = 887 (Q 20); Zerfass et al. 2010 / n = 809 (Q 19); Zerfass et al. 2009 / n = 951 (Q 17). Q: In which of the following bands does your basic annual salary fall? Results might be influenced by varying numbers and regional/hierarchical background of respondents in annual surveys.

Salary development on other hierarchical levels

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

Year	Up to €30.000	€30,001 - €60,000	€60,001 - €100,000	€100,001 - €150,000	More than €150,000
2016	26.7%	39.3%	21.1%	8.5%	4.5%
2015	32.2%	36.4%	21.5%	6.1%	3.8%
2014	29.5%	38.1%	21.6%	7.5%	3.4%
2013	28.6%	33.1%	25.5%	9.2%	3.6%
2012	26.9%	38.6%	23.5%	8.1%	2.9%
2011	29.2%	34.4%	23.0%	9.4%	4.0%
2010	24.8%	38.9%	27.0%	7.5%	1.8%
2009	14.8%	42.7%	28.6%	9.2%	4.7%

Legend: ■ Up to €30.000 ■ €30,001 - €60,000 ■ €60,001 - €100,000 ■ €100,001 - €150,000 ■ More than €150,000

Male communicators earn more than female on the same hierarchical level

Group	Up to €30.000	€30,001 - €60,000	€60,001 - €100,000	€100,001 - €150,000	More than €150,000
Female heads of communication	14.5%	23.4%	29.7%	18.6%	13.8%
Male heads of communication	8.2%	17.6%	28.0%	23.1%	23.1%
Other female professionals	30.6%	43.0%	17.8%	5.9%	2.7%
Other male professionals	20.4%	33.3%	26.4%	12.7%	7.3%

Legend:
- ■ Up to €30.000
- ■ €30,001 - €60,000
- ■ €60,001 - €100,000
- ■ €100,001 - €150,000
- ■ More than €150,000

Annual salaries for communicators in different types of organisation
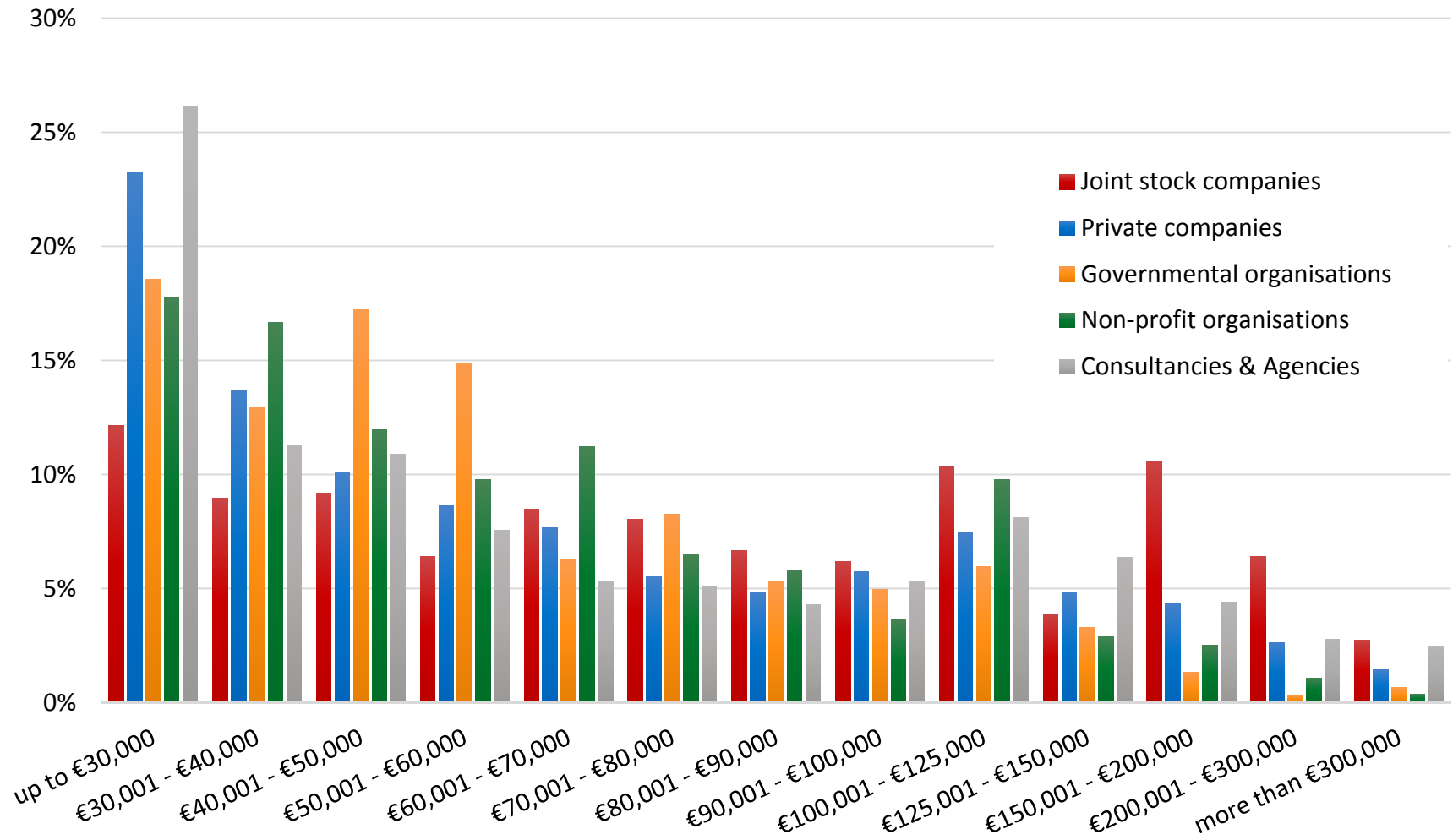
Legend:
- Joint stock companies
- Private companies
- Governmental organisations
- Non-profit organisations
- Consultancies & Agencies

Annual salaries in different European countries

Country	Up to €30.000	€30,001 - €60,000	€60,001 - €100,000	€100,001 - €150,000	More than €150,000
Germany	5.6%	21.0%	23.8%	28.0%	21.7%
Austria	4.3%	29.8%	38.3%	14.9%	12.8%
Switzerland	2.7%	24.2%	38.3%		34.2%
France	8.2%	44.7%	24.7%	15.3%	7.1%
Belgium	9.4%	41.0%	23.1%	15.4%	11.1%
Netherlands	3.4%	26.3%	41.5%	18.6%	10.2%
United Kingdom	4.7%	34.5%	31.8%	13.6%	15.5%
Ireland	6.1%	36.7%	44.9%	8.2%	4.1%
Sweden		46.1%	42.7%	6.7%	3.4%
Norway		18.0%	49.2%	27.9%	4.9%
Finland		62.7%	27.8%	5.6%	2.4%
Spain	18.5%	36.9%	19.7%	14.6%	10.2%
Italy	24.8%	34.8%	16.3%	14.2%	9.9%
Slovenia	42.6%	44.4%	7.4%	3.7%	1.9%
Croatia	62.3%	26.0%	6.5%	2.6%	2.6%
Serbia	75.4%	19.3%	3.5%		1.8%
Poland	48.9%	37.8%	11.1%		2.2%
Romania	73.7%	19.7%	3.9%		2.6%
Ukraine	68.5%	22.2%	3.7%		3.7%
Russia	59.2%	26.5%	6.1%		8.2%

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,001 PR professionals from 20 countries. Q 32: In which of the following bands does your basic annual salary fall?

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Annual salaries in different European countries in detail

	Up to €30.000	€30,001 - €60,000	€60,001 - €100,000	€100,001 - €150,000	More than €150,000		Up to €30.000	€30,001 - €60,000	€60,001 - €100,000	€100,001 - €150,000	More than €150,000
Germany	5.6%	21.0%	23.8%	28.0%	21.7%	Finland	1.6%	62.7%	27.8%	5.6%	2.4%
Austria	4.3%	29.8%	38.3%	14.9%	12.8%	Spain	18.5%	36.9%	19.7%	14.6%	10.2%
Switzerland	0.7%	2.7%	24.2%	38.3%	34.2%	Italy	24.8%	34.8%	16.3%	14.2%	9.9%
France	8.2%	44.7%	24.7%	15.3%	7.1%	Slovenia	42.6%	44.4%	7.4%	3.7%	1.9%
Belgium	9.4%	41.0%	23.1%	15.4%	11.1%	Croatia	62.3%	26.0%	6.5%	2.6%	2.6%
Netherlands	3.4%	26.3%	41.5%	18.6%	10.2%	Serbia	75.4%	19.3%	3.5%	-	1.8%
United Kingdom	4.7%	34.5%	31.8%	13.6%	15.5%	Poland	48.9%	37.8%	11.1%	-	2.2%
Ireland	6.1%	36.7%	44.9%	8.2%	4.1%	Romania	73.7%	19.7%	3.9%	-	2.6%
Sweden	1.1%	46.1%	42.7%	6.7%	3,3%	Ukraine	68.5%	22.2%	3.7%	1.9%	3.7%
Norway	-	18.0%	49.2%	27.9%	4.9%	Russia	59.2%	26.5%	6.1%	-	8.2%

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 2,001 PR professionals from 20 countries. Q 32: In which of the following bands does your basic annual salary fall?

EACD members enjoy a comparatively high annual salary

Legend: ■ EACD members ■ Other communication professionals

X-axis categories: up to €30,000 / €30,001 - €40,000 / €40,001 - €50,000 / €50,001 - €60,000 / €60,001 - €70,000 / €70,001 - €80,000 / €80,001 - €90,000 / €90,001 - €100,000 / €100,001 - €125,000 / €125,001 - €150,000 / €150,001 - €200,000 / €200,001 - €300,000 / more than €300,000
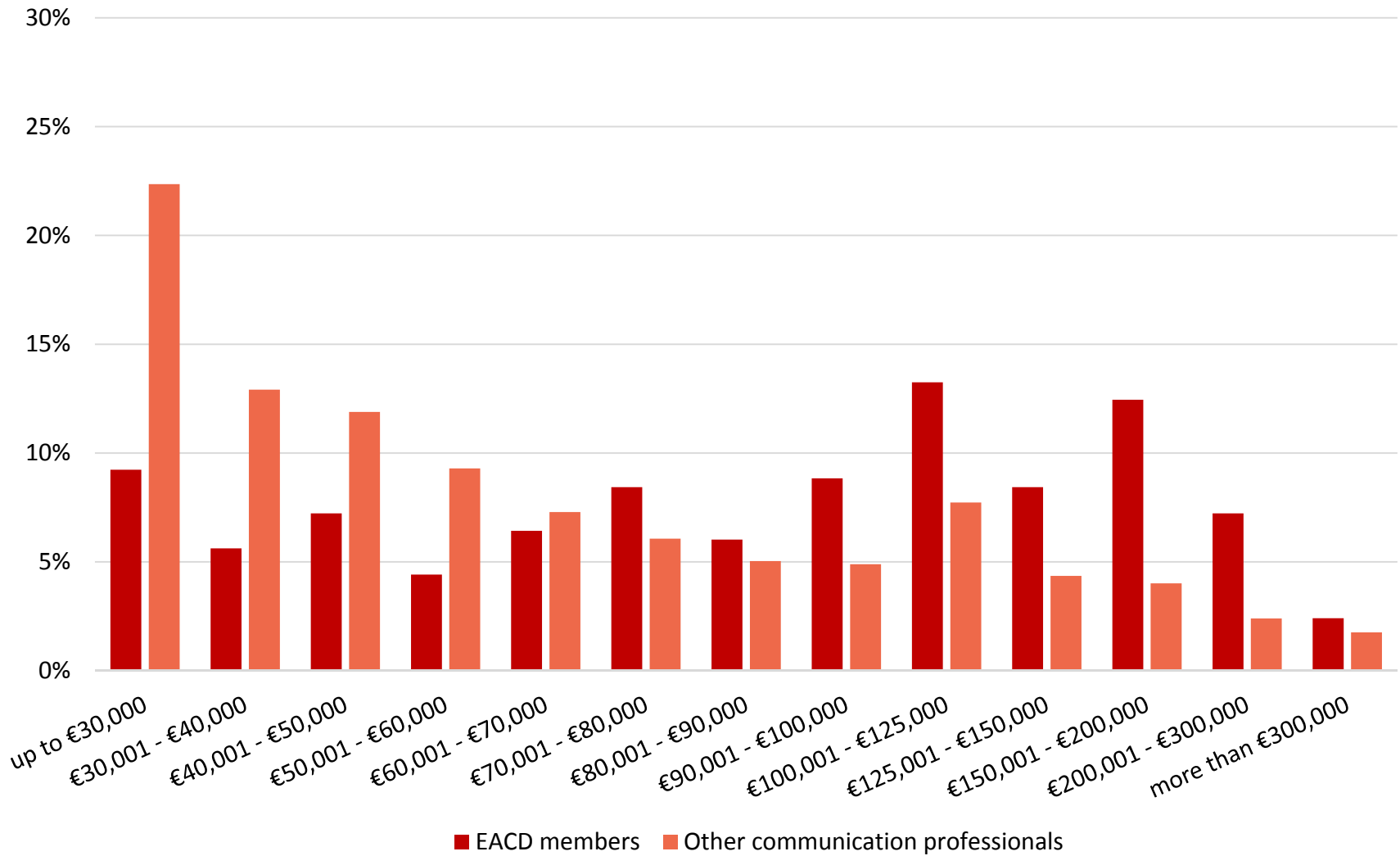
**Characteristics of
excellent communication
departments**
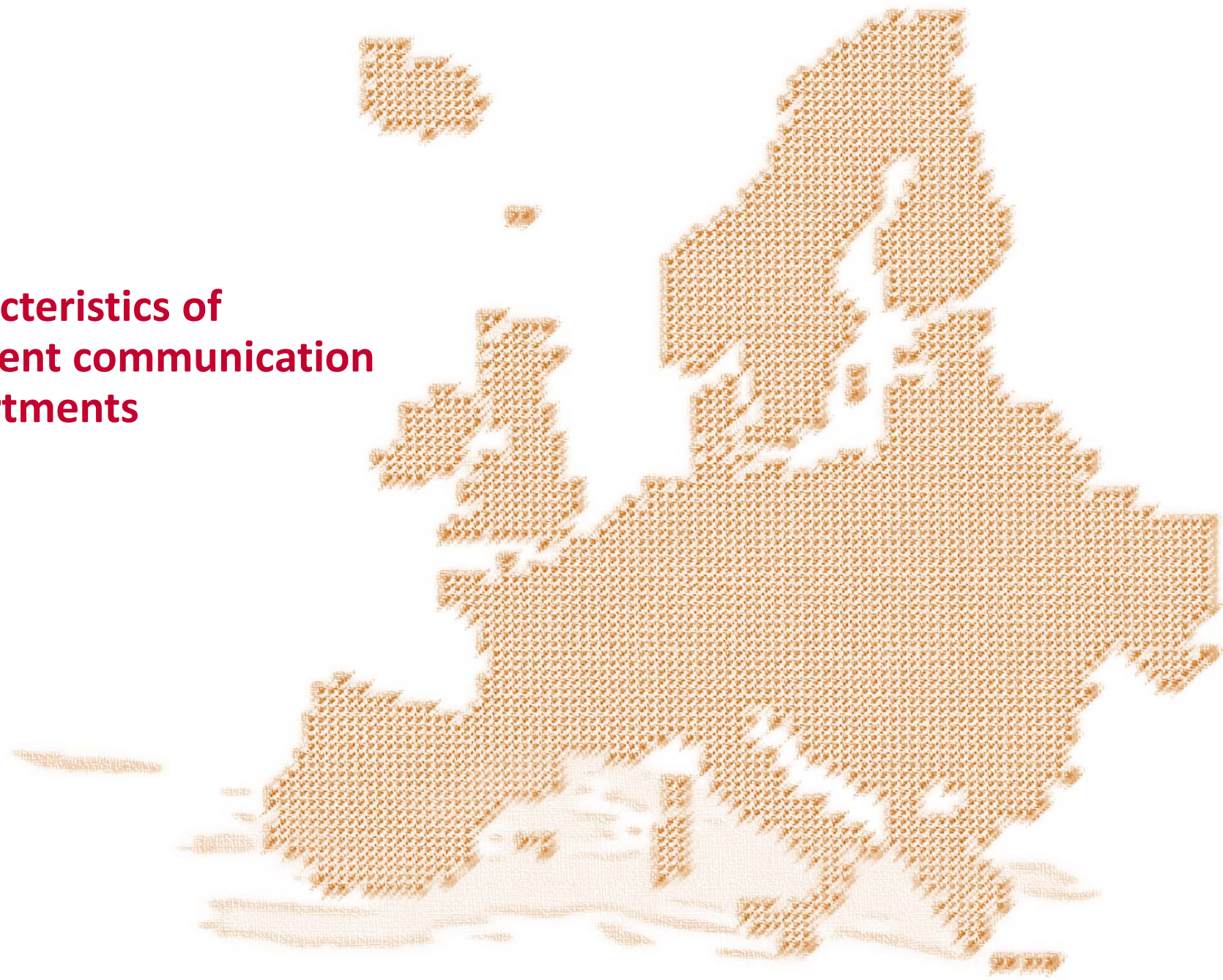
Chapter overview

Companies and other organisations are continuously forced to improve their performance. Well-established approaches to master this challenge are quality management, process reengineering and business excellence models. Excellence can be defined as "an outstanding practice in managing the organization and achieving results" (Martin-Castilla & Rodriguez-Ruiz, 2008: 136). Organisations try to identify characteristics of excellence, benchmark their own performance along these dimensions, and focus on weak points to improve and out-perform. In public relations scholarship, excellence is often derived from the static Excellence Theory by Grunig and colleagues, which postulates normatively that communication management is most valuable when it is managerial, strategic, symmetrical, diverse, integrated, socially responsible, ethical and global (Grunig et al., 2002; Kim et al., 2013). In management theory and practice, however, excellence is mostly conceptualised as a dynamic model for self-assessment against a provided framework. On the level of general management, many business excellence models have been developed and are in use around the globe (Dahlgaard et al., 2013; Dahlgaard-Park & Dahlgaard, 2007). The Communication Monitor research series has adopted this approach for the functional level of strategic communication and public relations (Verčič & Zerfass, 2015).

In the comparative excellence framework (CEF), theoretical considerations are combined with self-assessments of communication professionals and statistical analyses to identify the characteristics which make a difference. Excellence is based on the internal standing of the communication department within the organisation (influence) and external results of the communication department's activities as well as its basic qualifications (performance). Each of these two components were calculated on the basis of four dimensions (see page 104). Only organisations clearly outperforming in all dimensions are considered as excellent. The portion of excellent departments identified was 20.0 per cent in the ECM 2016. This confirms results of previous communication monitor studies in Europe, Latin America and Asia-Pacific, where the excellence fraction lies between 19.8 and 24.4 per cent (Zerfass et al., 2014: 135; Zerfass et al., 2015: 109; Moreno et al., 2015: 99; Macnamara et al., 2015: 77).

The ECM 2016 shows that excellent communication departments have implemented big data activities significantly more often. One third of them also consults internal clients and colleagues about the topic. Big data analytics are used for the same purposes as in other departments, but more intensively. Social media influencers are regarded as more important and specific measures to deal with them are available to a higher degree. Excellent departments are also better aligned to the top management. Professionals working there spend less time for operational work. They put more effort on coaching and consulting other members of the organisation with a highly significant focus on advising and enabling top executives.

This is linked to a higher level of staff competencies. Excellent departments employ communicators with stronger management skills. They are notably better in strategic positioning and managing relationships, information and human resources. Moreover, the average self-assessment of their social media competencies is positive for all dimensions except for understanding the use of algorithms. These depart-ments are distinguishable by their investment in personnel development. Organisations with excellent communication departments offer much more training in the technical, business, management and communication realm. They also focus on conveying knowledge and not merely on training skills.

Identifying excellent communication departments

Statistical analyses are used to identify excellent organisations, based on benchmarking approaches and self-assessments known from quality management

EXCELLENCE

Communication departments in organisations which outperform others in the field

INFLUENCE

Internal standing of the communication department within the organisation

PERFORMANCE

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

ADVISORY INFLUENCE

(Q21)

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

EXECUTIVE INFLUENCE

(Q22)

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

SUCCESS

(Q23)

The communication of the organisation in general is (very) successful

COMPETENCE

(Q24)

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

www.communicationmonitor.eu / Zerfass et al. 2016 / Only organisations outperforming in all four dimensions (scale points 6-7 on a 7-point-scale) will be considered as "excellent" in the benchmark exercise comparing distribution and characteristics of organisations, departments and communicators.

Excellent communication departments

Advisory influence

| 4.0% | 6.8% | 11.8% | 20.4% | 32.8% | 22.9% |

1.2%

■ Not seriously at all (1) ■ (2) ■ (3) ■ (4) ■ (5) ■ (6) ■ Very seriously (7)

Executive influence

| 6.5% | 5.6% | 10.0% | 19.6% | 32.1% | 23.4% |

2.4%

■ Never (1) ■ (2) ■ (3) ■ (4) ■ (5) ■ (6) ■ Always (7)

Success

| 3.3% | 7.7% | 15.2% | 33.8% | 30.5% | 8.5% |

1.0%

■ Not successful at all (1) ■ (2) ■ (3) ■ (4) ■ (5) ■ (6) ■ Very successful (7)

Competence

| 3.1% | 7.4% | 16.8% | 28.8% | 31.6% | 11.2% |

1.0%

■ Much worse (1) ■ (2) ■ (3) ■ (4) ■ (5) ■ (6) ■ Much better (7)

Excellent communication departments
20.0%

Other communication departments
80.0%

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 1,504 PR professionals in communication departments. Advisory influence, Q 21: In your organisation, how seriously do senior managers take the recommendations of the communication function? Executive influence, Q 22: How likely is it that communication would be invited to senior-level meetings dealing with organisational strategic planning? Success, Q 23: In your opinion, how successful is the communication of your organisation in general? Competence, Q 24: How would you estimate the quality and ability of the communication function in your organisation compared to those of competitors? Scale 1 – 7 (wording see above). Percentages: Excellent communication functions based on scale points 6-7 for each question.

Influential communication departments:
Joint stock companies are leading the field

	Influential communication departments	Other communication departments
Joint stock companies	47.8%	52.2%
Private companies	39.3%	60.7%
Governmental organisations	42.5%	57.5%
Non-profit organisations	42.5%	57.5%

■ Influential communication departments ■ Other communication departments

Successful communication departments: higher percentage identified in joint stock companies and non-profits

Joint stock companies

57.1%

42.9%

Private companies

61.5%

38.5%

■ Successful communication departments

■ Others

Governmental organisations

34.6%

65.4%

Non-profit organisations

63.4%

41.6%
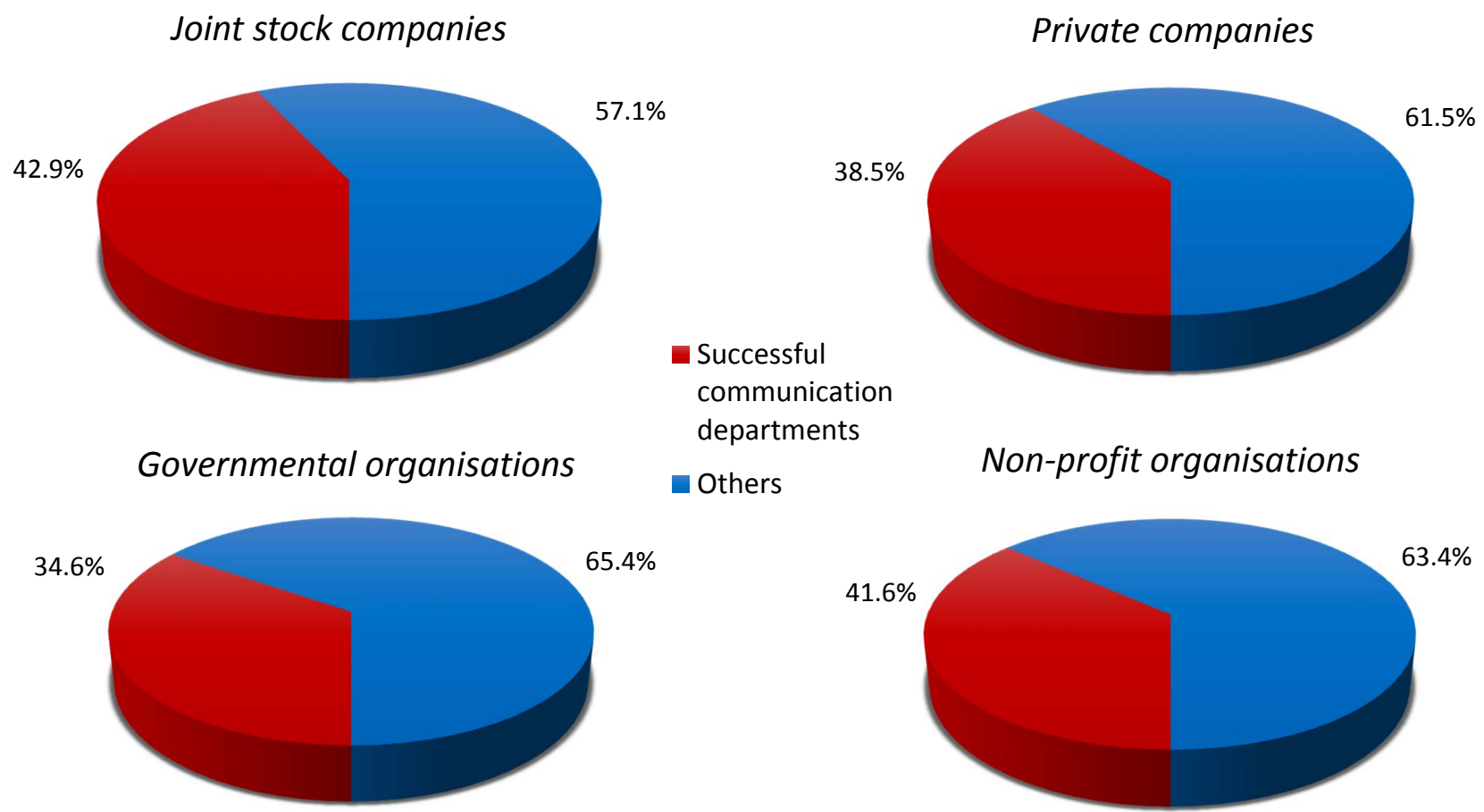
Competence of communication departments: non-profits are lagging behind
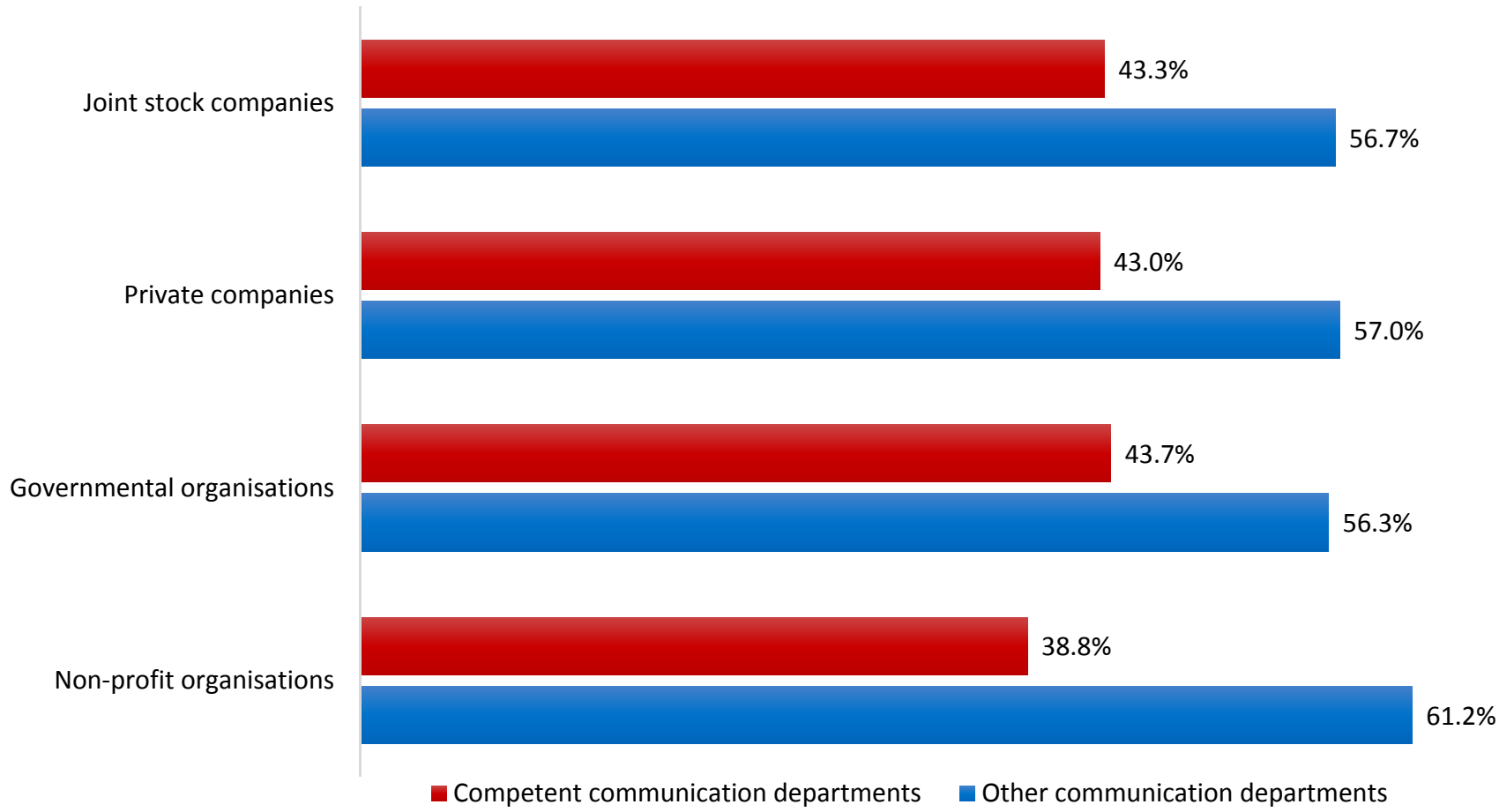
Joint stock companies
- Competent: 43.3%
- Other: 56.7%

Private companies
- Competent: 43.0%
- Other: 57.0%

Governmental organisations
- Competent: 43.7%
- Other: 56.3%

Non-profit organisations
- Competent: 38.8%
- Other: 61.2%

■ Competent communication departments ■ Other communication departments

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 1,504 PR professionals in communication departments. Q 24: How would you estimate the quality and ability of the communication function in your organisation compared to those of competitors? Percentages: Competent communication functions based on scale points 6-7.

Excellent communication functions in different types of organisations

Organisation type	Excellent communication departments	Other communication departments
Joint stock companies	22.9%	77.1%
Private companies	19.3%	80.7%
Governmental organisations	16.9%	83.1%
Non-profit organisations	19.4%	80.6%

■ Excellent communication departments ■ Other communication departments

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 1,504 PR professionals in communication departments across Europe. Excellence based on advisory and executive influence of the communication department within the organisation and its performance (success and competence); see page 110.
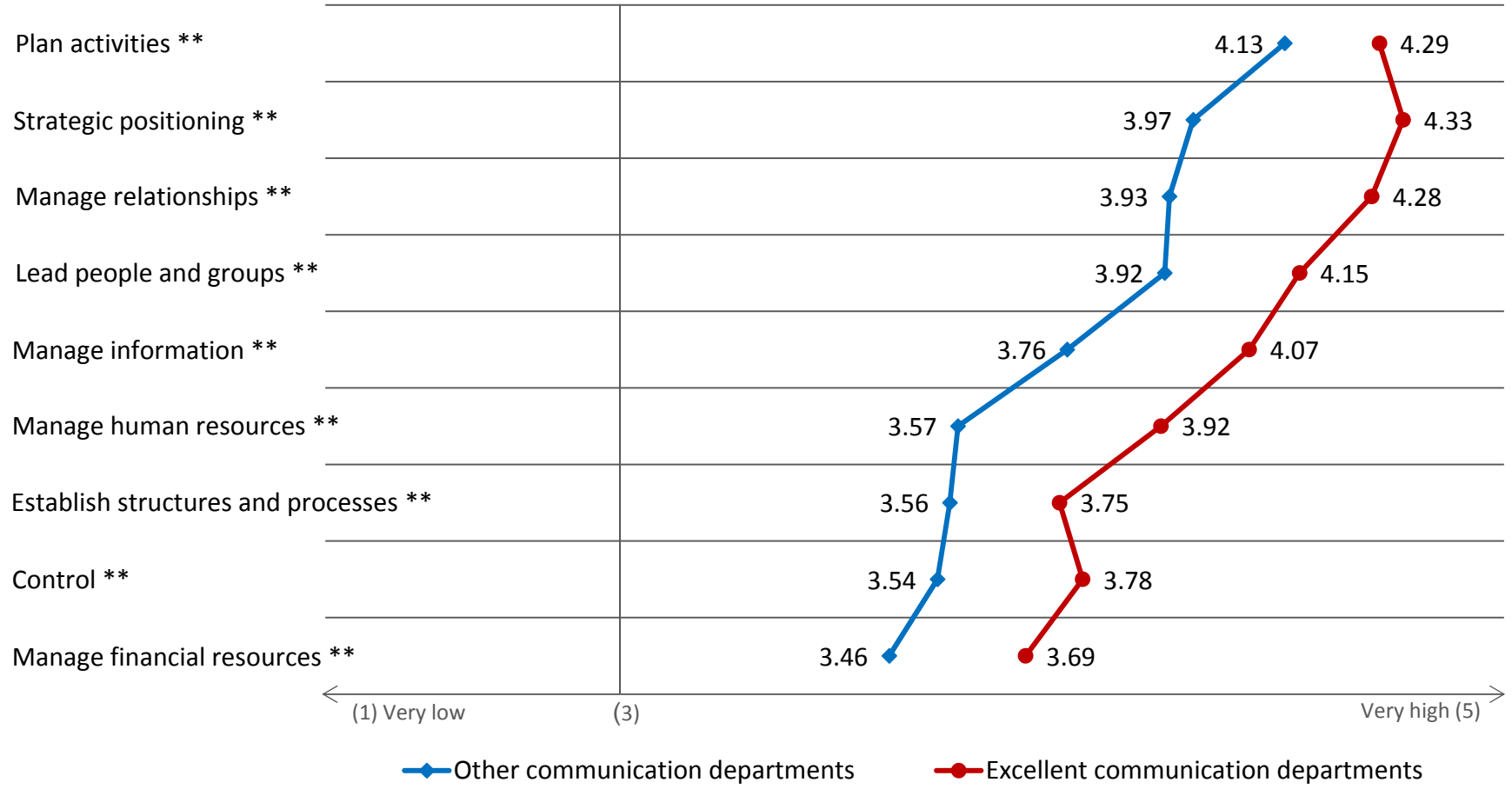
Excellent communication departments are better aligned to the executive board

Excellent communication departments	39.5%	54.5%	6.0%
Other communication departments	23.4%	58.4%	18.2%
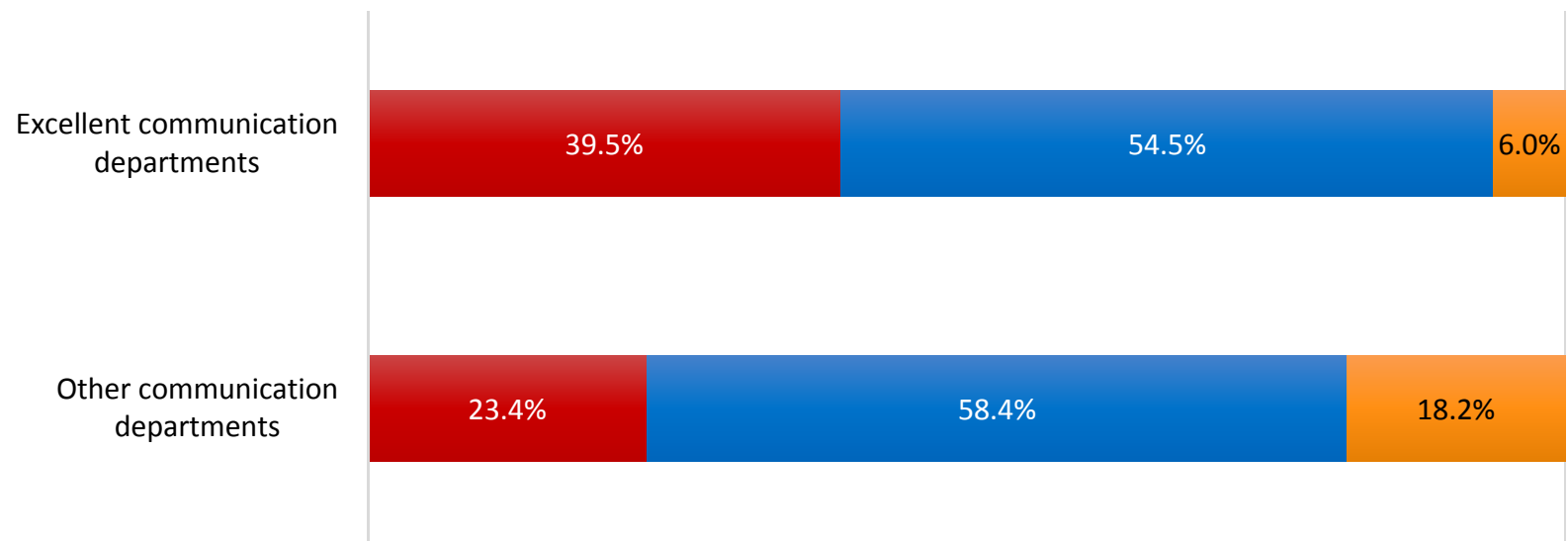
The top communication manager / chief communication officer …

■ is a member of the executive board (strongly aligned)

■ reports directly to the CEO or highest decision-maker on the executive board (aligned)

■ does not report directly to the CEO or highest decision-maker (weakly aligned)

Excellent communication departments are forerunners in big data

My communication department …
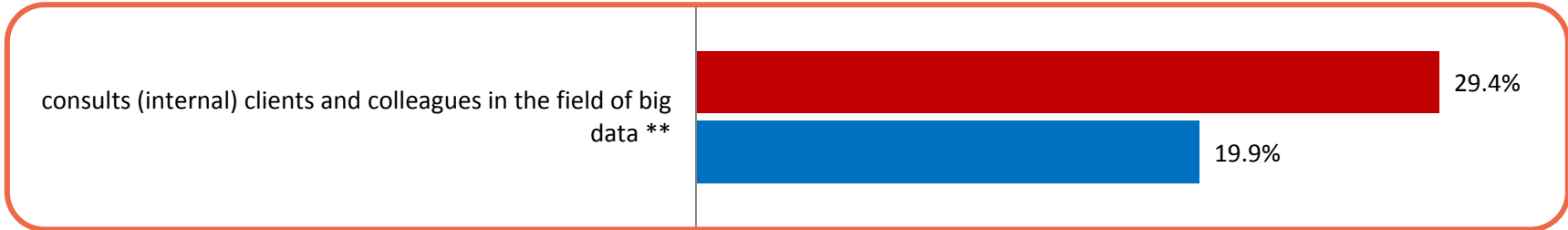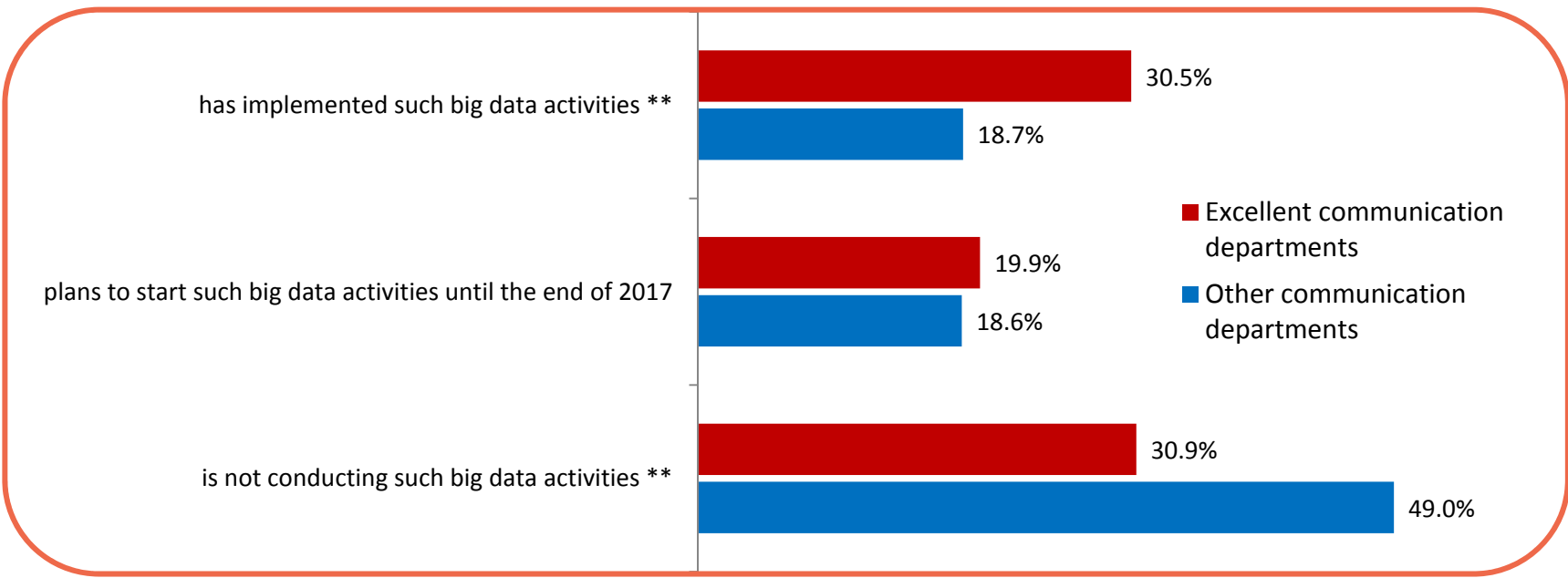
has implemented such big data activities ** — 30.5% (Excellent communication departments), 18.7% (Other communication departments)

plans to start such big data activities until the end of 2017 — 19.9% (Excellent), 18.6% (Other)

is not conducting such big data activities ** — 30.9% (Excellent), 49.0% (Other)

■ Excellent communication departments
■ Other communication departments

consults (internal) clients and colleagues in the field of big data ** — 29.4% (Excellent), 19.9% (Other)

Excellent communication departments are more engaged in big data – most of them are both attentive and knowledgeable
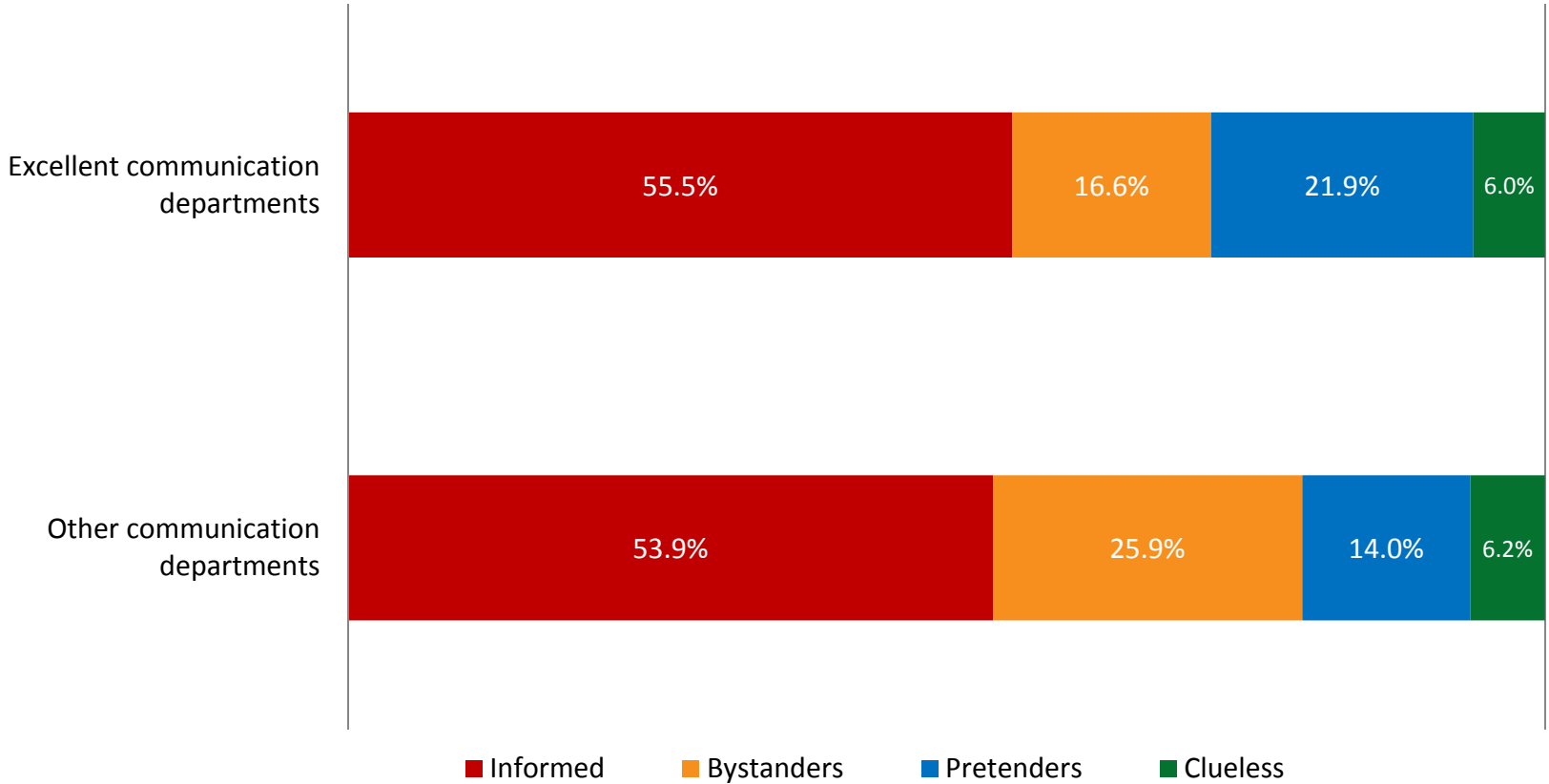
	Informed	Bystanders	Pretenders	Clueless
Excellent communication departments	55.5%	16.6%	21.9%	6.0%
Other communication departments	53.9%	25.9%	14.0%	6.2%

■ Informed   ■ Bystanders   ■ Pretenders   ■ Clueless
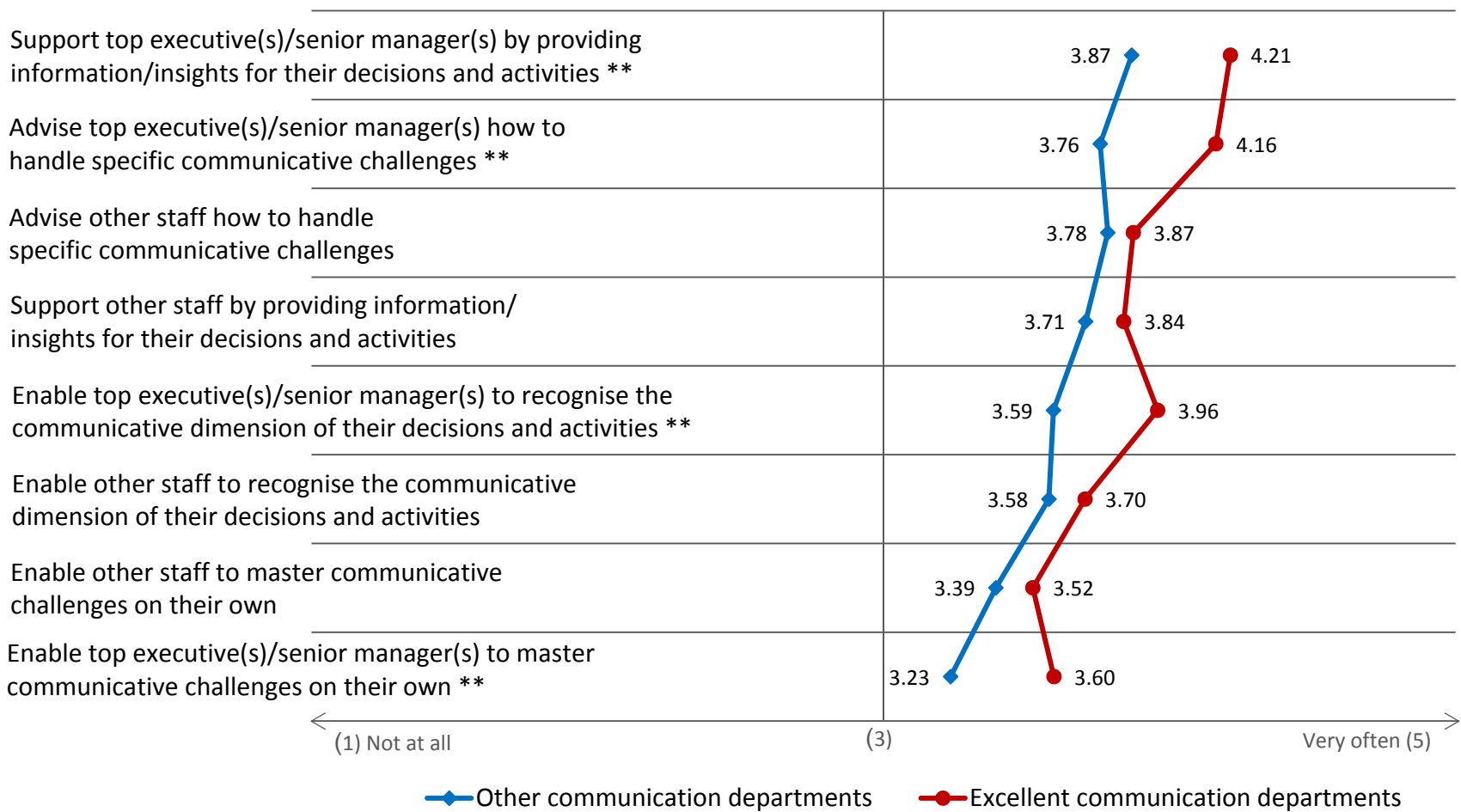
www.communicationmonitor.eu / Zerfass et al. 2016 / n = 1,504 PR professionals working in communication departments. Cluster analysis based on Q 1 (attention given to the debate on big data, ranging from no attention at all to close attention) and Q 2 (knowledge about big data definitions) identified four different groups of respondents. Highly significant differences (chi-square test, p ≤ 0.01, Cramer's V = 0.110).

Big data analytics are used more intensively in excellent departments

We analyse big data to plan overall strategies ** — 3.34 / 3.88

We analyse big data to justify activities ** — 3.17 / 3.70

We analyse big data to guide day-to-day actions ** — 2.85 / 3.38

(1) Never — (3) — Always (5)

◆ Other communication departments   ● Excellent communication departments
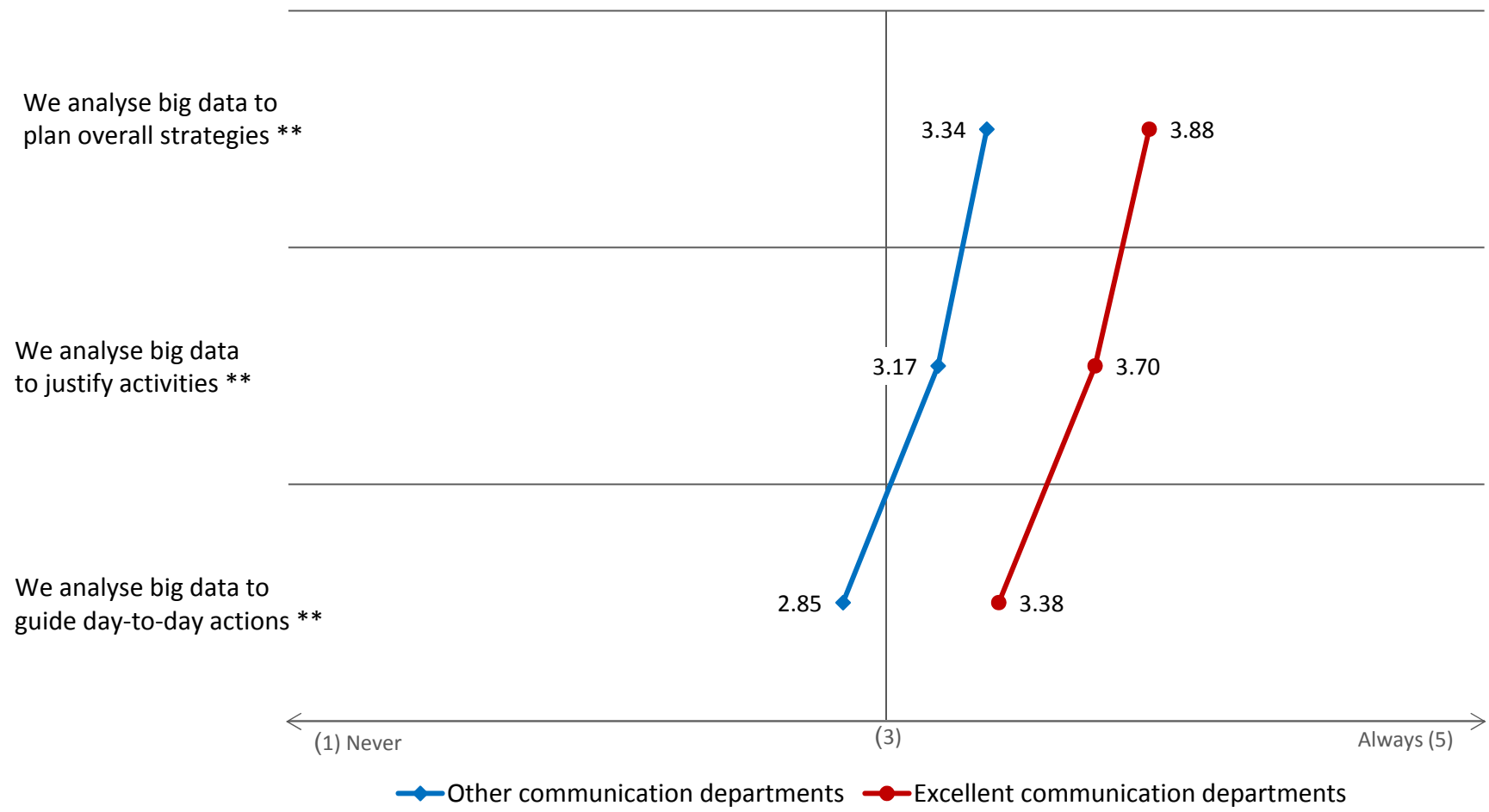
Social media influencers and strategies for dealing with them are more relevant in excellent departments
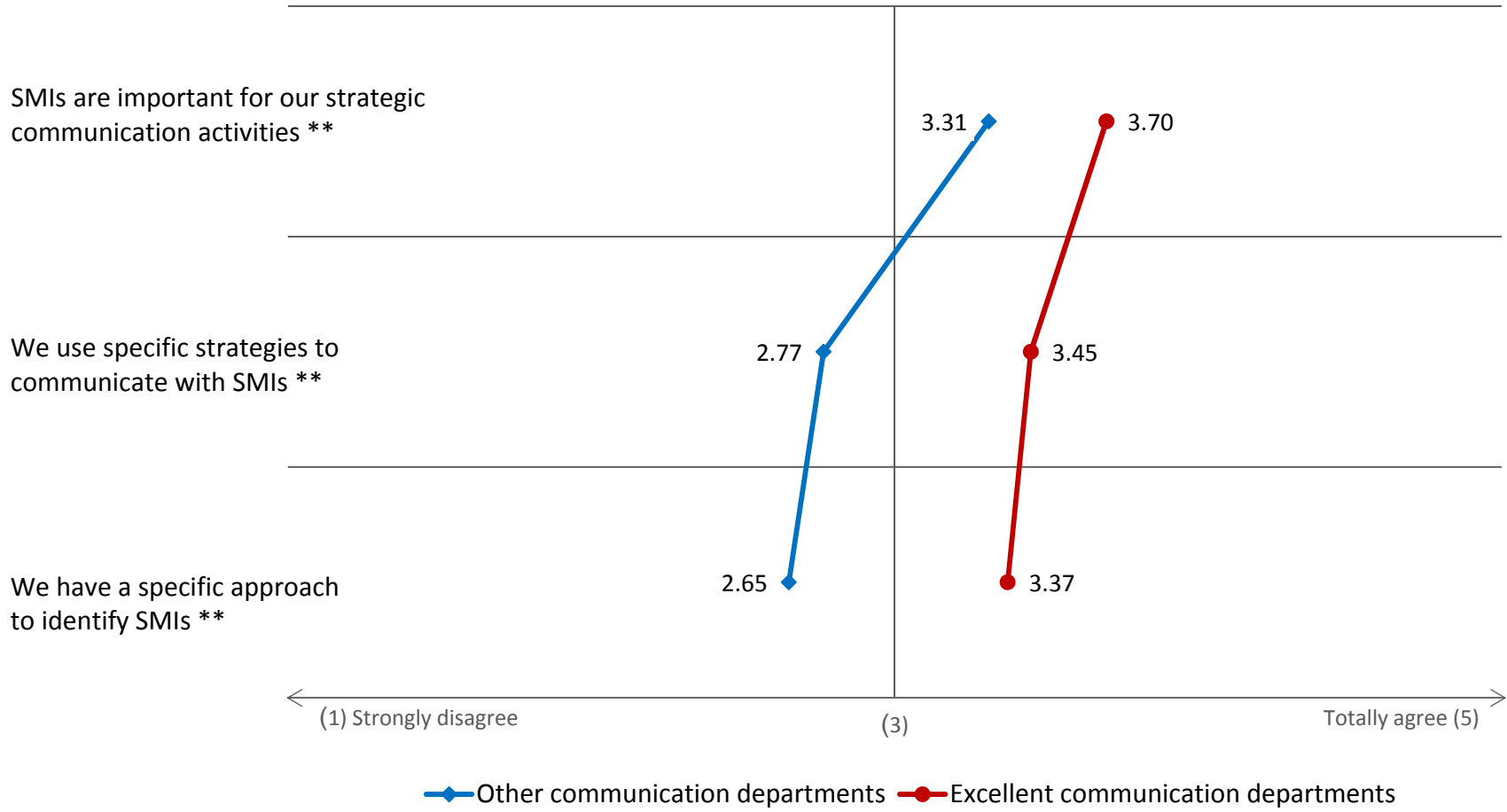
SMIs are important for our strategic communication activities **   3.31   3.70

We use specific strategies to communicate with SMIs **   2.77   3.45

We have a specific approach to identify SMIs **   2.65   3.37

(1) Strongly disagree   (3)   Totally agree (5)

Other communication departments   Excellent communication departments

www.communicationmonitor.eu / Zerfass et al. 2016 / n = 1,504 PR professionals working in communication departments. Q 13: Social media influencers (SMIs) "represent new types of independent third party endorsers who shape audience attitudes through blogs, tweets, and the use of other social media." Please rate the following statements, thinking of your organisation/agency. Scale 1 (Strongly disagree) – 5 (Totally agree). ** Highly significant differences Pearson correlation, p ≤ 0.01.

Practitioners working in excellent department are better qualified in the field of social media

	Other communication departments	Excellent communication departments
Delivering messages via social media **	3.68	3.89
Knowing about social media trends **	3.46	3.78
Knowing how to avoid risks and handle crises on social media **	3.39	3.74
Developing social media strategies **	3.32	3.70
Evaluating social media activities **	3.35	3.58
Identifying social media influencers **	3.14	3.49
Interpreting social media monitoring data **	3.11	3.52
Managing online communities **	3.13	3.36
Setting up social media platforms **	3.07	3.47
Initiating web-based dialogues with stakeholders **	2.93	3.31
Knowing the legal framework for social media **	2.95	3.22
Understanding the use of algorithms **	2.53	2.87

(1) Very low   (3)   Very high (5)

◆ Other communication departments   ● Excellent communication departments

Excellent departments employ communicators with stronger management skills

	Other communication departments	Excellent communication departments
Plan activities **	4.13	4.29
Strategic positioning **	3.97	4.33
Manage relationships **	3.93	4.28
Lead people and groups **	3.92	4.15
Manage information **	3.76	4.07
Manage human resources **	3.57	3.92
Establish structures and processes **	3.56	3.75
Control **	3.54	3.78
Manage financial resources **	3.46	3.69

(1) Very low (3) Very high (5)

◆ Other communication departments ● Excellent communication departments

Communication professionals in excellent departments spend less time for operational work and put more effort on strategic tasks

	Operational communication	Managing communication activities and co-workers	Aligning communication, the organisation/client and its stakeholders	Coaching, training, consulting and enabling members of my organisation or clients
Excellent communication departments	34.2%	28.1%	19.9%	17.8%
Other communication departments	37.9%	28.4%	17.9%	15.9%

■ Operational communication
■ Managing communication activities and co-workers
■ Aligning communication, the organisation/client and its stakeholders
■ Coaching, training, consulting and enabling members of my organisation or clients

Professionals in excellent departments focus on supporting top management

Activity	Other	Excellent
Support top executive(s)/senior manager(s) by providing information/insights for their decisions and activities **	3.87	4.21
Advise top executive(s)/senior manager(s) how to handle specific communicative challenges **	3.76	4.16
Advise other staff how to handle specific communicative challenges	3.78	3.87
Support other staff by providing information/ insights for their decisions and activities	3.71	3.84
Enable top executive(s)/senior manager(s) to recognise the communicative dimension of their decisions and activities **	3.59	3.96
Enable other staff to recognise the communicative dimension of their decisions and activities	3.58	3.70
Enable other staff to master communicative challenges on their own	3.39	3.52
Enable top executive(s)/senior manager(s) to master communicative challenges on their own **	3.23	3.60

(1) Not at all   (3)   Very often (5)

◆ Other communication departments   ● Excellent communication departments

Excellent organisations invest significantly more in personnel development

Training offered/facilitated by organisations to develop ...

Technical knowledge **
- Excellent communication departments: 16.0%
- Other communication departments: 6.9%

Technical skills **
- Excellent communication departments: 18.7%
- Other communication departments: 10.8%

Business knowledge **
- Excellent communication departments: 25.0%
- Other communication departments: 15.2%

Business skills **
- Excellent communication departments: 27.9%
- Other communication departments: 17.2%

Management knowledge **
- Excellent communication departments: 23.0%
- Other communication departments: 11.8%

Management skills *
- Excellent communication departments: 34.8%
- Other communication departments: 28.7%

Communication knowledge **
- Excellent communication departments: 23.9%
- Other communication departments: 15.3%

Communication skills **
- Excellent communication departments: 36.2%
- Other communication departments: 26.6%

■ Excellent communication departments
■ Other communication departments

www.communicationmonitor.eu / Zerfass et al. 2016 / n ^{min} = 1,431 PR professionals working in communication departments. Q 17: Thinking of yourself, your current capabilities and your future development, which of the following skills and knowledge areas do you believe are in need of developing? My organisation offers / facilitates training. * Significant differences (Chi-square test, p ≤ 0.05). ** Highly significant differences (Chi-square test, p ≤ 0.01).

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European Public Relations Education and Research Association (EUPRERA)

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

www.euprera.org

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The EACD is the leading network for communication professionals across Europe with more than 2,300 members. It brings in-house communication experts together to exchange ideas and discuss the latest trends in international PR. Through Working Groups on specific communications topics and diverse publications, the EACD fosters ongoing professional qualification and promotes the reputation of the profession.

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More information

A large selection of reports, videos and publications based on the European Communication Monitor (ECM) surveys from 2007 onwards are available on the internet. Related surveys are conducted in other regions of the world – the Latin American Communication Monitor and the Asia-Pacific Communication Monitor. Altogether, more than 4,500 public relations professionals in more than 80 countries are surveyed in each wave of this largest and only truly global study of the profession with transparent empirical standards.

Visit *www.communicationmonitor.eu* for updates and links.

The European Communication Monitor (ECM) is an international research initiative conducted by the European Public Relations Educations and Research Association (EUPRERA) and the European Association of Communication Directors (EACD) in partnership with PRIME Research and Communication Director magazine.
The annual study has been conducted since 2007 with the aim to stimulate and promote the knowledge and practice of communication management across Europe.
More than 4,500 communication professionals from over 80 countries are surveyed in each wave of the European, Latin American and Asia-Pacific Communication Monitor, making this the largest and only truly global study of the profession based on sound empirical standards.