

# EUROPEAN COMMUNICATION MONITOR 2011

EMPIRICAL INSIGHTS INTO STRATEGIC COMMUNICATION IN EUROPE  
RESULTS OF A SURVEY IN 43 COUNTRIES

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Magazine for Corporate Communications and Public Relations

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## Key facts

### **European Communication Monitor 2011**

- Most comprehensive analysis of communication management and public relations worldwide with 2,209 participating professionals from 43 countries
- Annual research project conducted since 2007 by a group of professors from 11 renowned universities across Europe, led by Prof. Dr. Ansgar Zerfass, University of Leipzig
- Organised by the European Public Relations Education and Research Association (EUPRERA), European Association of Communication Directors (EACD) and Communication Director Magazine
- Sponsors: Infopaq and Grayling
- Research topics in 2011: Decision making, leadership style, role enactment; power of communication departments; ROI of communication; trust; development of disciplines and communication channels; social media governance, skills and activities; qualification needs; salaries; credibility of public relations and alternative concepts for the profession

## Academic task force

### **Research team**

- Ansgar Zerfass, Prof. Dr., University of Leipzig (GE) – Lead Researcher
- Piet Verhoeven, Ass. Prof. Dr., University of Amsterdam (NL)
- Ralph Tench, Prof. Dr., Leeds Metropolitan University (UK)
- Angeles Moreno, Prof. Dr., University Rey Juan Carlos, Madrid (ES)
- Dejan Verčič, Prof. Dr., University of Ljubljana (SI)

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### **Statistical analysis and assistant researchers**

- Ronny Fechner M.A., University of Leipzig (GE)
- Katharina Simon B.Sc., University of Leipzig (GE)

## Partners

### **European Public Relations Education and Research Association (EUPRERA)**

- The European Public Relations Education and Research Association is an autonomous organisation with members from more than 30 countries that aims at stimulating and promoting the knowledge and practice of communication management in Europe. Academic scholars and experienced practitioners work together to advance fundamental and applied research. [www.euprera.org](http://www.euprera.org)

### **European Association of Communication Directors (EACD)**

- The European Association of Communication Directors is the leading network for communication professionals across Europe with more than 1,600 members. The non-partisan association lobbies for the profession, establishes common quality standards and promotes the advancement of professional qualification by organising events and providing services and material. [www.eacd-online.eu](http://www.eacd-online.eu)

### **Communication Director**

- Communication Director is a quarterly magazine for Corporate Communications and Public Relations in Europe. It documents opinions on strategic questions in communication, highlights transnational developments and discusses them from a European perspective. The magazine is published by Helios Media, a specialist publishing house based in Berlin and Brussels. [www.communication-director.eu](http://www.communication-director.eu)

## Sponsors

### **Infopaq**

- Infopaq is a global, European-based company, with expertise in media, publicity and analysis. By providing media monitoring, surveys, tracking, news evaluation, analysis and consulting services, we help our clients improve future communications efforts and thereby attain their business goals. We have approximately 6.500 clients and more than 500 employees in Denmark, Estonia, Finland, Germany, Norway and Sweden.  
[www.infopaq.com](http://www.infopaq.com)

### **Grayling**

- Grayling is the world's second largest independent Public Relations, Government Relations, Investor Relations and Events consultancy with specialist services including CSR, environment and sustainability, and digital. The consultancy has 1,000 staff in 70 offices in 40 countries across the US, Western and Eastern Europe and the Asia Pacific region.  
[www.grayling.com](http://www.grayling.com)

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- You are welcome to quote from the content of this survey and reproduce any graphics, subject to the condition that the source including the internet address is clearly quoted and depicted on every chart. See the imprint for more information.
- The full report (text and figures) is available as a book published by Helios Media, 133 pp., ISBN 978-3-942263-12-2.

### Suggested citation for this document (APA style)

- Zerfass, A., Verhoeven, P., Tench, R., Moreno, A., & Verčič, D. (2011): *European Communication Monitor 2011. Empirical Insights into Strategic Communication in Europe. Results of an Empirical Survey in 43 Countries (Chart Version)*. Brussels: EACD, EUPRERA (available at: [www.communicationmonitor.eu](http://www.communicationmonitor.eu))

### Short quotation to be used in legends (charts/graphics)

- Source: European Communication Monitor 2011



Research design and socio-demographic analysis

## Outline of the survey

### **Aims and focus**

- to monitor trends in communication management
- to analyse the changing framework for the profession in Europe
- to evaluate specific topics like decision making, power, trust, social media skills, return on investment for communications, qualification needs, salaries and the image of public relations as well as alternative concepts for the profession.
- to identify the development of communication management in different types of organisations, countries and regions

### **Target group**

- Communication managers and PR professionals working in organisations and consultancies throughout Europe

# Methodology

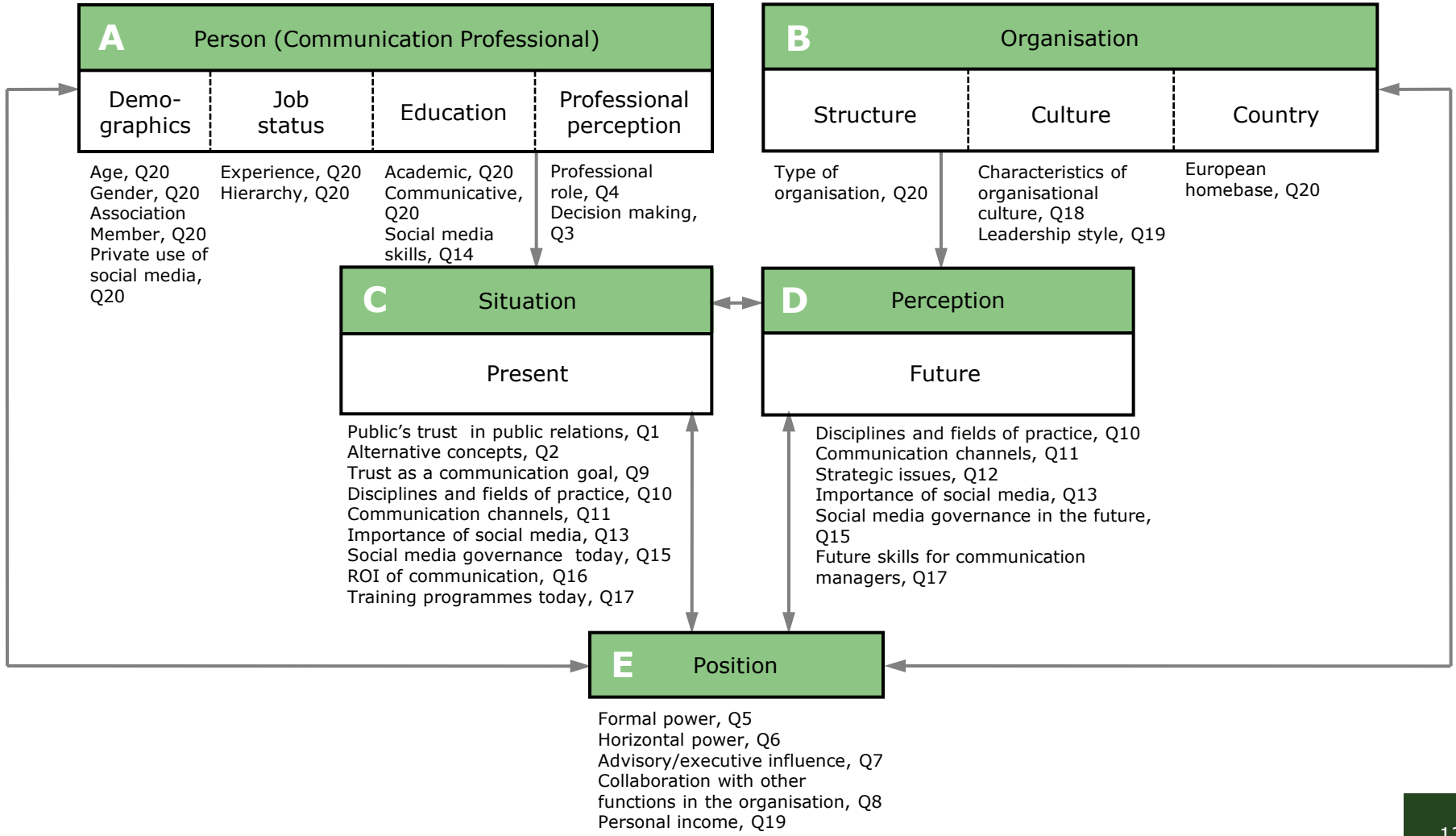
## Survey method and sampling

- online survey in March 2011 (4 weeks), English language
- questionnaire with 20 sections, based on hypotheses and instruments derived from previous research and literature
- pre-test with 31 practitioners in 10 European countries
- personal invitation to 30,000+ professionals throughout Europe via e-mail based on a database provided by EACD; additional invitations to participate via national branch associations and networks (partly self-recruiting); 4,014 respondents and 2,277 fully completed replies
- evaluation is based on 2,209 fully completed replies by participants clearly identified as part of the population (communication professionals in Europe)

## Statistical analysis

- methods of empirical research, descriptive and analytical analysis (using SPSS)
- results have been statistically agreed by Pearson's chi-square tests ( $\chi^2$ ) or Spearman's rank correlation tests ( $\rho$ ) and are classified as significant ( $p \leq 0.05$ ) where appropriate
- in this report, significant correlations are marked in the footnotes

# Research framework and questions



## Demographic background of participants

Position	
Head of communication, Agency CEO	48.8%
Responsible for single communication discipline, Unit Leader	28.8%
Team member, Consultant	17.6%
Other	5.7%

Organisation	
Communication department	71.2%
▪ joint stock company	28.0%
▪ private company	18.2%
▪ government-owned, public sector, political organisation	14.1%
▪ non-profit organisation, association	10.9%
Communication consultancy, PR Agency, Freelance consultant	28.8%

Job experience	
Up to 5 years	15.9%
6 to 10 years	27.4%
More than 10 years	56.7%

Gender / Age	
Female	55.6%
Male	44.4%
Age (on average)	41.2 years

## Geographical distribution and affiliation

### Respondents

- Professionals working in communication management 2,209

### Geographical distribution

- Total number of European states 43
- Northern Europe (e.g. Norway, United Kingdom, Latvia) 27.9%
- Western Europe (e.g. Germany, Netherlands, France) 29.2%
- Southern Europe (e.g. Italy, Slovenia, Croatia) 32.4%
- Eastern Europe (e.g. Poland, Czech Republic, Romania) 10.5%

### Membership in a professional organisation

- EACD 15.2%
- Other international communication association 16.7%
- National PR or communication association 54.4%

## Personal background of respondents

### Communication qualifications

- Academic degree in Communication (Bachelor, Master, Doctorate) 44.5%
- Professional certificate in Public Relations / Communication Management 25.6%
- Professional certificate in other communication discipline 16.2%

### Highest academic educational qualification

- Doctorate (Ph.D., Dr.) 6.7%
- Master (M.A., M.Sc., Mag., M.B.A.), Diploma 58.8%
- Bachelor (B.A., B.Sc.) 27.8%
- No academic degree 6.6%

Female professionals are more likely to hold a Bachelor's or Master's, while more male practitioners have a Doctorate or no degree

Academic degree \ Gender	Female	Male	Total
Doctorate (Ph.D., Dr.)	5.0%	9.0%	6.7%
Master, Diploma (M.A., M.Sc., Mag., M.B.A.)	61.5%	55.4%	58.8%
Bachelor (B.A., B.Sc.)	29.0%	26.4%	27.8%
No academic degree	4.6%	9.2%	6.6%

## Organisational cultures: Different types within the sample

	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations	Agencies/ Consultancies
Integrated culture (participative – proactive)	59.5%	62.2%	52.9%	62.1%	83.0%
Interactive culture (participative – reactive)	16.7%	15.9%	19.2%	20.0%	8.6%
Entrepreneurial culture (non-participative – proactive)	5.0%	6.2%	6.1%	3.8%	3.5%
Systematised culture (non-participative – reactive)	18.8%	15.7%	21.8%	14.2%	4.9%

## Countries and regions represented in the study

<b>Respondents are based in 43 European countries and four regions</b>			
Northern Europe 27.9% (n=617)	Western Europe 29.2% (n=645)	Eastern Europe 10.5% (n=231)	Southern Europe 32.4% (n=716)
Denmark Estonia Finland Iceland Ireland Latvia Lithuania Norway Sweden United Kingdom	Austria Belgium France Germany Liechtenstein Luxembourg Netherlands Switzerland	Belarus Bulgaria Czech Republic Georgia Hungary Poland Romania Russia Slovakia Ukraine	Albania Bosnia and Herzegovina Croatia Cyprus** Greece Italy Kosovo* Macedonia Malta Montenegro Portugal Serbia Slovenia Spain Turkey**

In this survey, the universe of 50 European countries is based on the official list of European Countries by the European Union ([http://europa.eu/abc/european\\_countries](http://europa.eu/abc/european_countries)). Countries are assigned to regions according to the official classification of the United Nations Statistics Division (<http://unstats.un.org/unsd/methods/m49/m49regin.htm>). Countries marked \* are not included in the UN classification; countries marked \*\* are assigned to Western Asia. These countries were collated like adjacent nations. No respondents were registered for this survey from Andorra, Armenia, Azerbaijan, Moldova, Monaco, San Marino and Vatican City.

## Interpretation

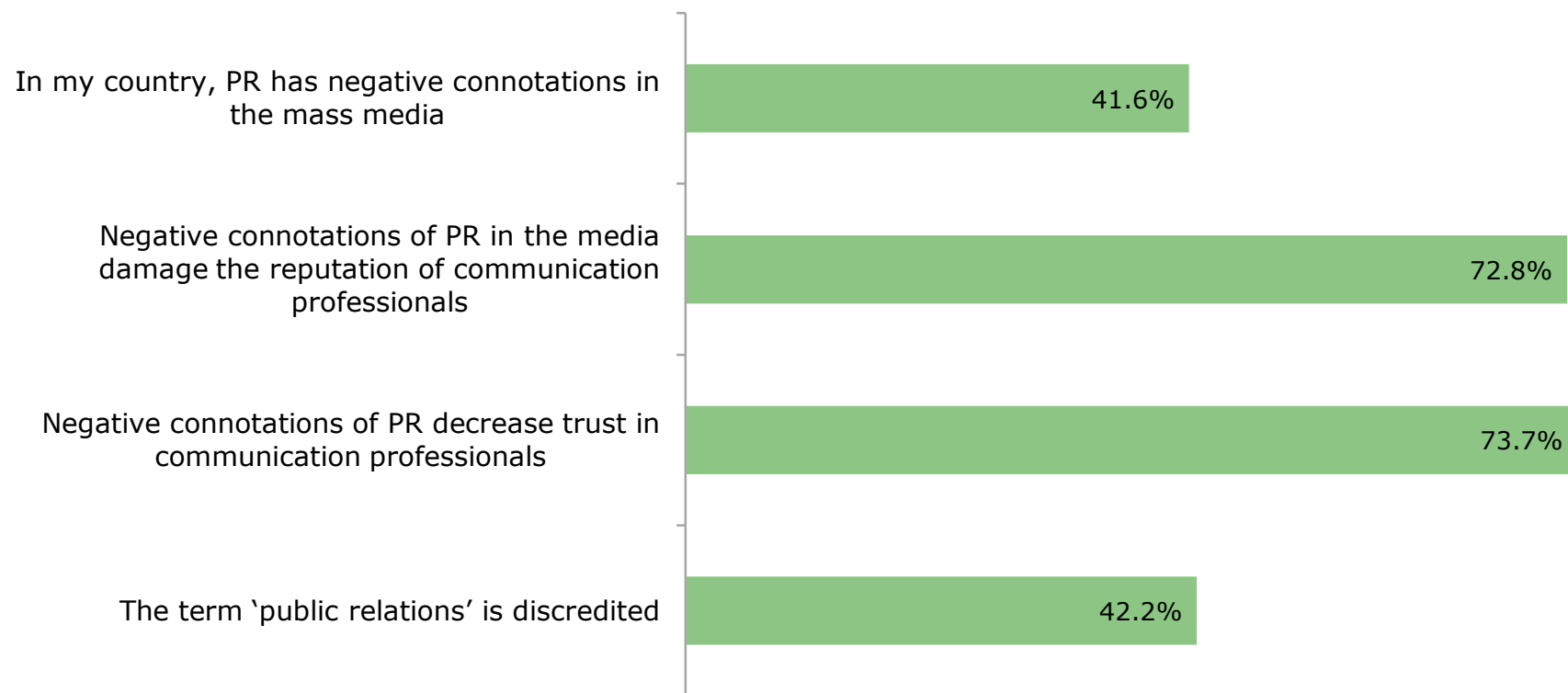
### **Insights into the structures and evolution of communications in Europe**

- Based on a sample of 2,209 professionals from 43 European countries, this research is the most comprehensive transnational study ever conducted in the field of public relations and communication management.
- Respondents are characterised by a high level of experience: more than three out of four are head of communications, unit leaders or agency CEOs, 56 per cent have more than ten years of professional experience, the average age is 41 years. The survey lays a solid foundation for identifying basic structures and developments in strategic communication.
- It is necessary to note that economies, communication landscapes and professions are in rather different stages of development throughout Europe. Moreover, there is no knowledge about the population of communication departments and agencies in Europe. The survey has been conducted in the English language. Consequently, the findings presented here can not claim representativeness. They are especially useful to identify relevant patterns and trends in the field, which may stimulate qualitative discussions.
- The analysis is based on thorough empirical research and analysis. Replies from participants not currently working in communication management (academics, students) and from non-European countries have been removed. Only fully completed questionnaires have been taken into account. Data have been analysed using the appropriate statistical procedures like chi-square tests and rank correlation tests.



Credibility of public relations and alternative concepts

# Professional communication is impaired by negative connotations of public relations in many European countries



# Perceived negative connotations of PR in the mass media correlate significantly with the disreputability of the concept

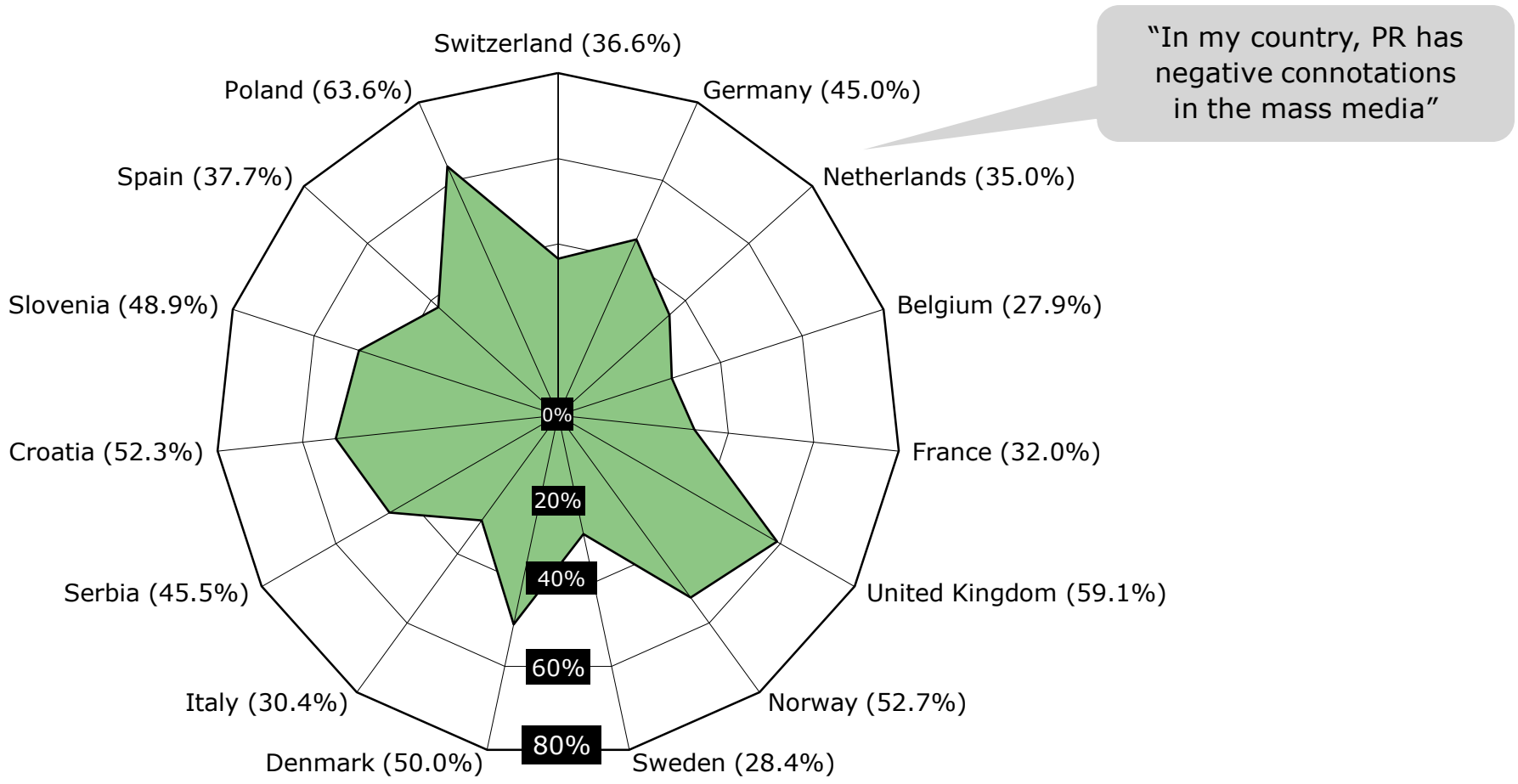
The term 'public relations' is significantly more likely to be discredited if it has negative connotations in the mass media

*Pearson correlation*

	The term 'public relations' is discredited	In my country, PR has negative connotations in the mass media
The term 'public relations' is discredited	1.000	0.534
In my country, PR has negative connotations in the mass media	0.534	1.000

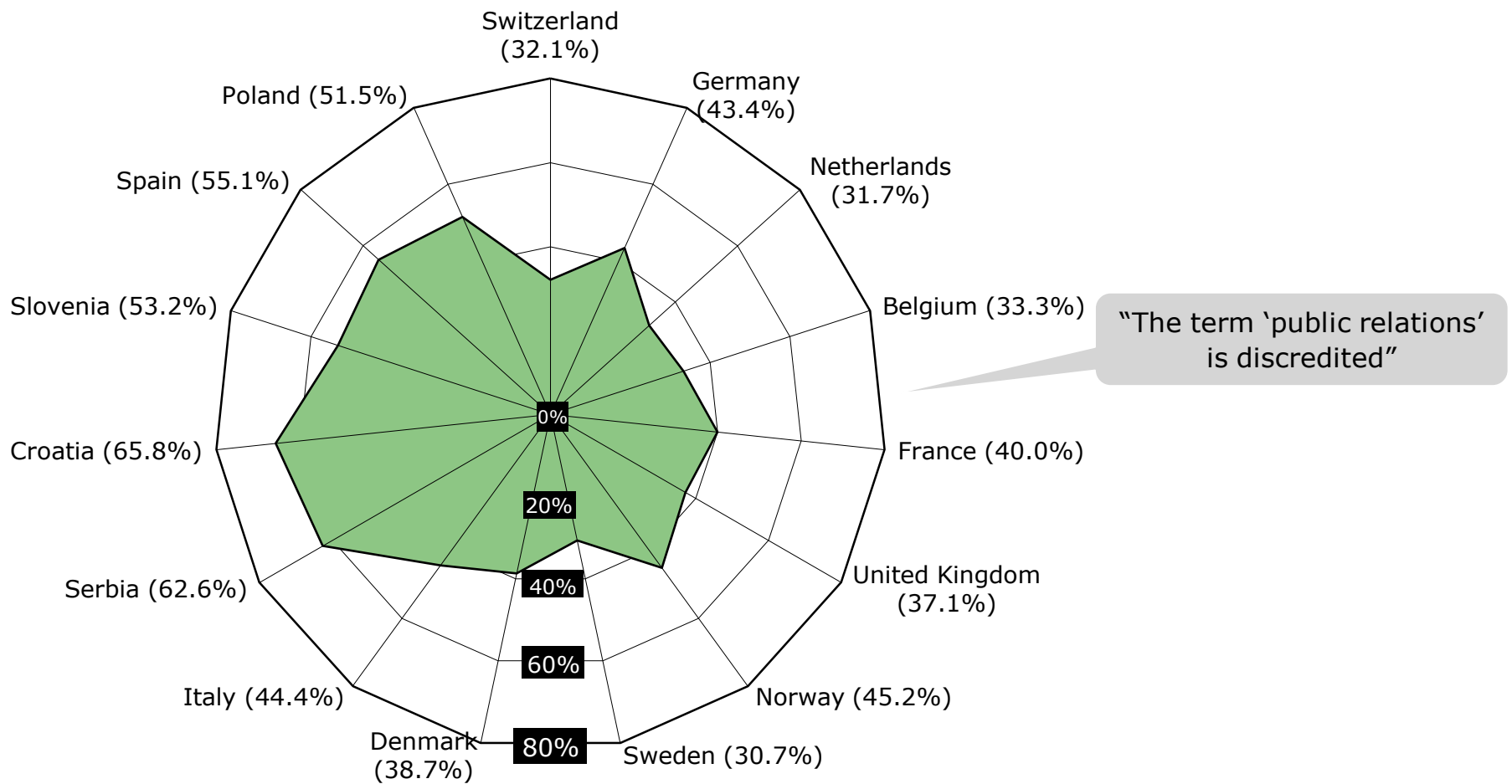
www.communicationmonitor.eu / Zerfass et al. 2011 / n = 2,209 PR professionals; Q 1: In many European countries public relations (PR) has negative connotations in the media. PR is often reduced to press relations and publicity. Professionals are sometimes labeled as 'spin doctors' and 'propagandists'. What do you think of these statements? Strong linear correlation between the items "The term 'public relations' is discredited" and "In my country, PR has negative connotations in the mass media" (Pearson correlation, 2-tailed,  $p \leq 0.01$ ).

# Perceived image of PR in the mass media: Predominantly negative in the UK and Poland, less problematic in Belgium, Sweden and Italy



www.communicationmonitor.eu / Zerfass et al. 2011 / n = 2,209 PR professionals; Q 1: In many European countries public relations (PR) has negative connotations in the media. PR is often reduced to press relations and publicity. Professionals are sometimes labeled as 'spin doctors' and 'propagandists'. What do you think of these statements? In my country, PR has negative connotations in the mass media. Scale 1-5, considered scale points 4-5 / Q 20.

# The term 'public relations' is discredited in most countries



www.communicationmonitor.eu / Zerfass et al. 2011 / n = 2,209 PR professionals; Q 1: In many European countries public relations (PR) has negative connotations in the media. PR is often reduced to press relations and publicity. Professionals are sometimes labeled as 'spin doctors' and 'propagandists'. What do you think of these statements? The term 'public relations' is discredited. Scale 1-5, considered scale points 4-5 / Q 20.

## Consultants are more critical of the term 'public relations' than professionals working in communication departments

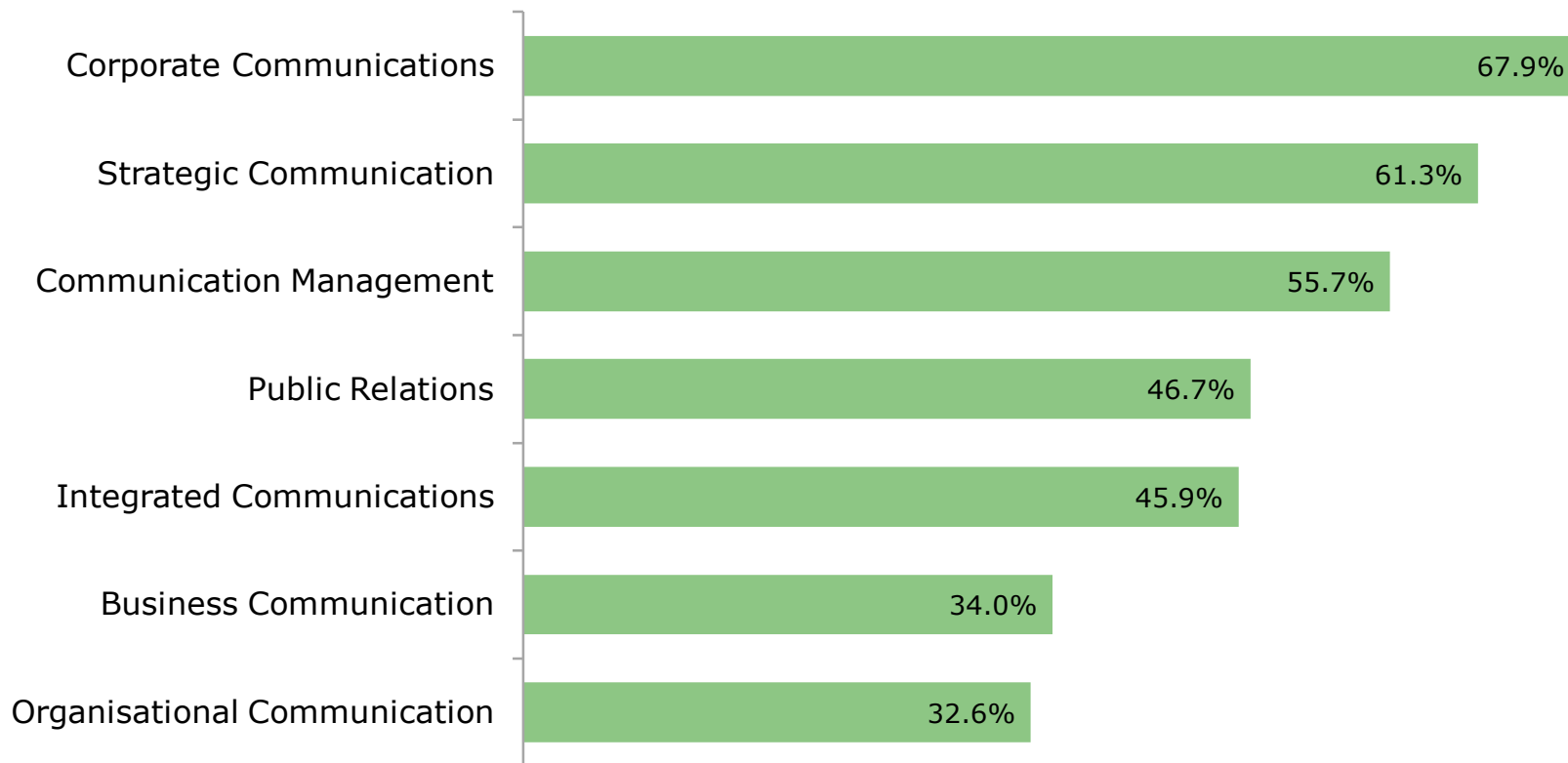
	Communication departments	Agencies/ Consultancies
In my country, PR has negative connotations in the mass media	37.8%	50.9%
Negative connotations of PR in the media damage the reputation of communication professionals	70.9%	77.7%
Negative connotations of PR decrease trust in communication professionals	72.5%	76.8%
The term 'public relations' is discredited	38.2%	52.3%

## Perceived negative connotations of public relations in different types of organisations (details)

	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations	Agencies/ Consultancies	Overall
In my country, PR has negative connotations in the mass media	35.6%	33.8%	46.2%	39.6%	50.9%	41.6%
Negative connotations of PR in the media damage the reputation of comm. professionals	69.3%	71.8%	70.5%	74.2%	77.7%	72.8%
Negative connotations of PR decrease trust in communication professionals	72.3%	71.9%	71.5%	75.0%	76.8%	73.7%
The term 'public relations' is discredited	37.2%	39.6%	42.3%	32.9%	52.3%	42.4%

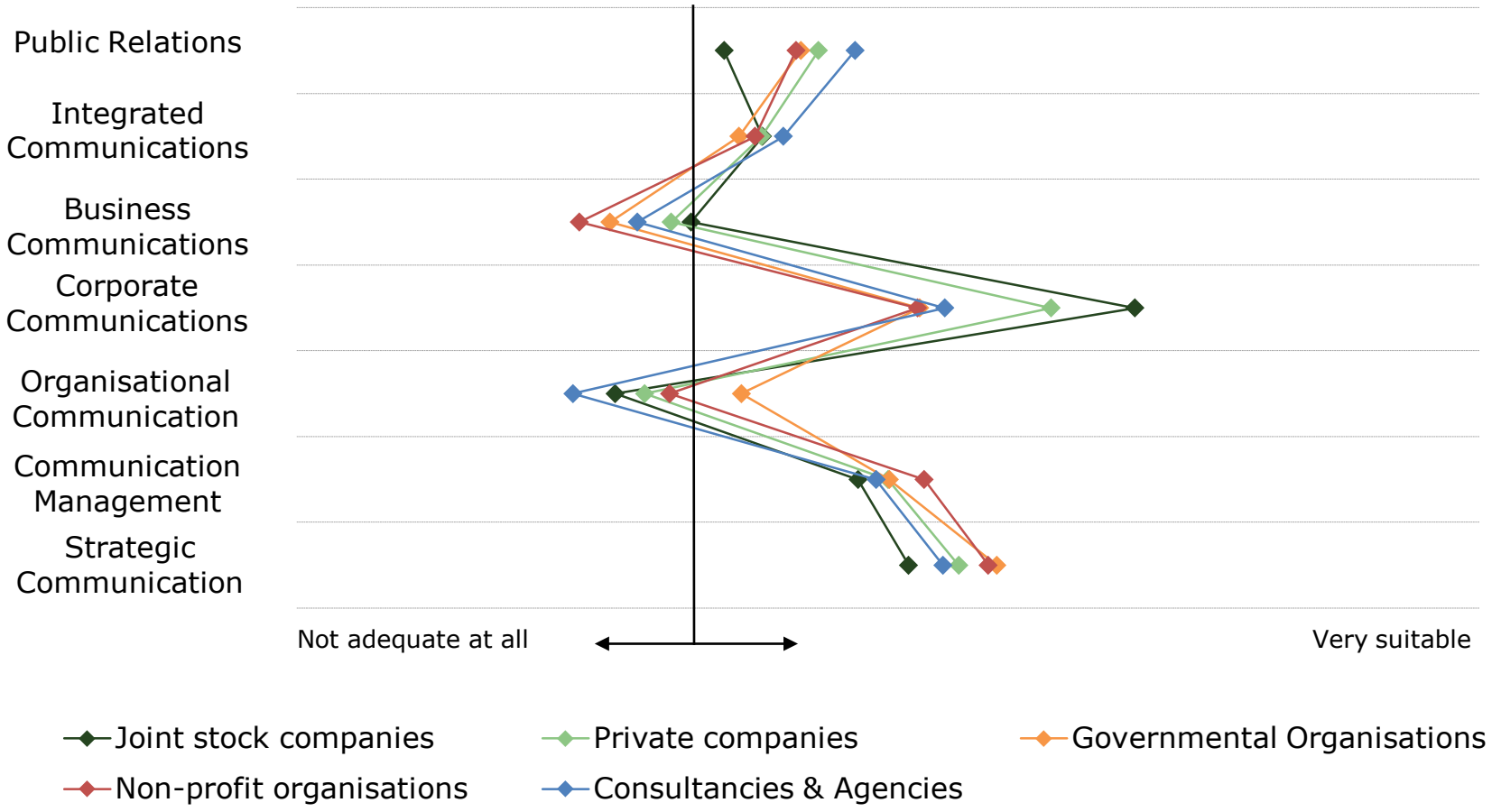
www.communicationmonitor.eu / Zerfass et al. 2011 / n = 2,209 PR professionals; Q 1: In many European countries public relations (PR) has negative connotations in the media. PR is often reduced to press relations and publicity. Professionals are sometimes labeled as 'spin doctors' and 'propagandists'. What do you think of these statements? Scale 1-5, considered scale points 4-5 / Q 20. Significant differences between all types of organisations (chi-square test,  $p \leq 0.05$ ).

## 'Public relations' is no longer regarded as a suitable label for the profession compared to other concepts



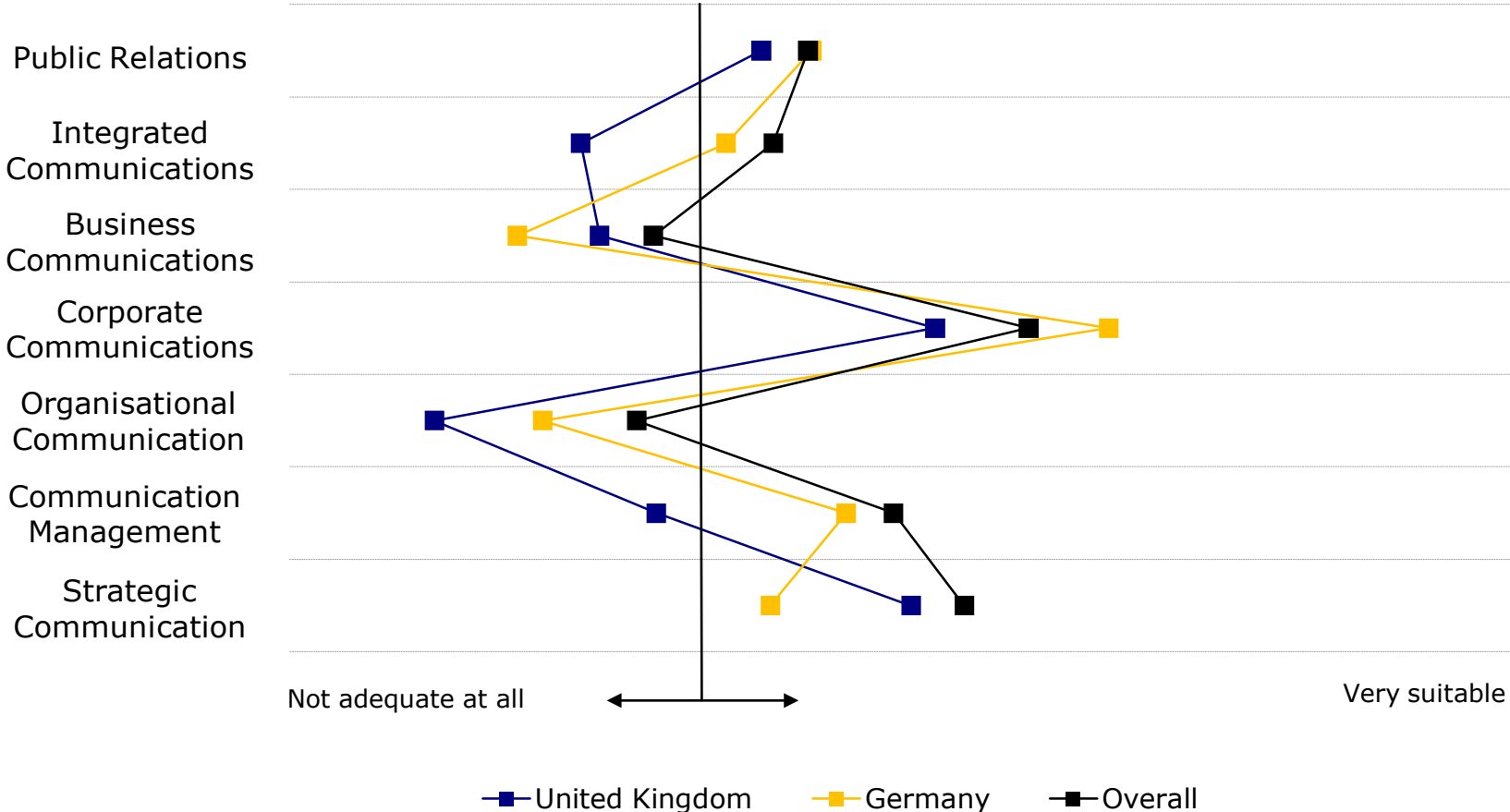
Suitability of alternative concepts to describe the various internal and external communication activities by an organisation

# Companies favour 'Corporate Communications'; non-profit and governmental organisations prefer 'Strategic Communication'



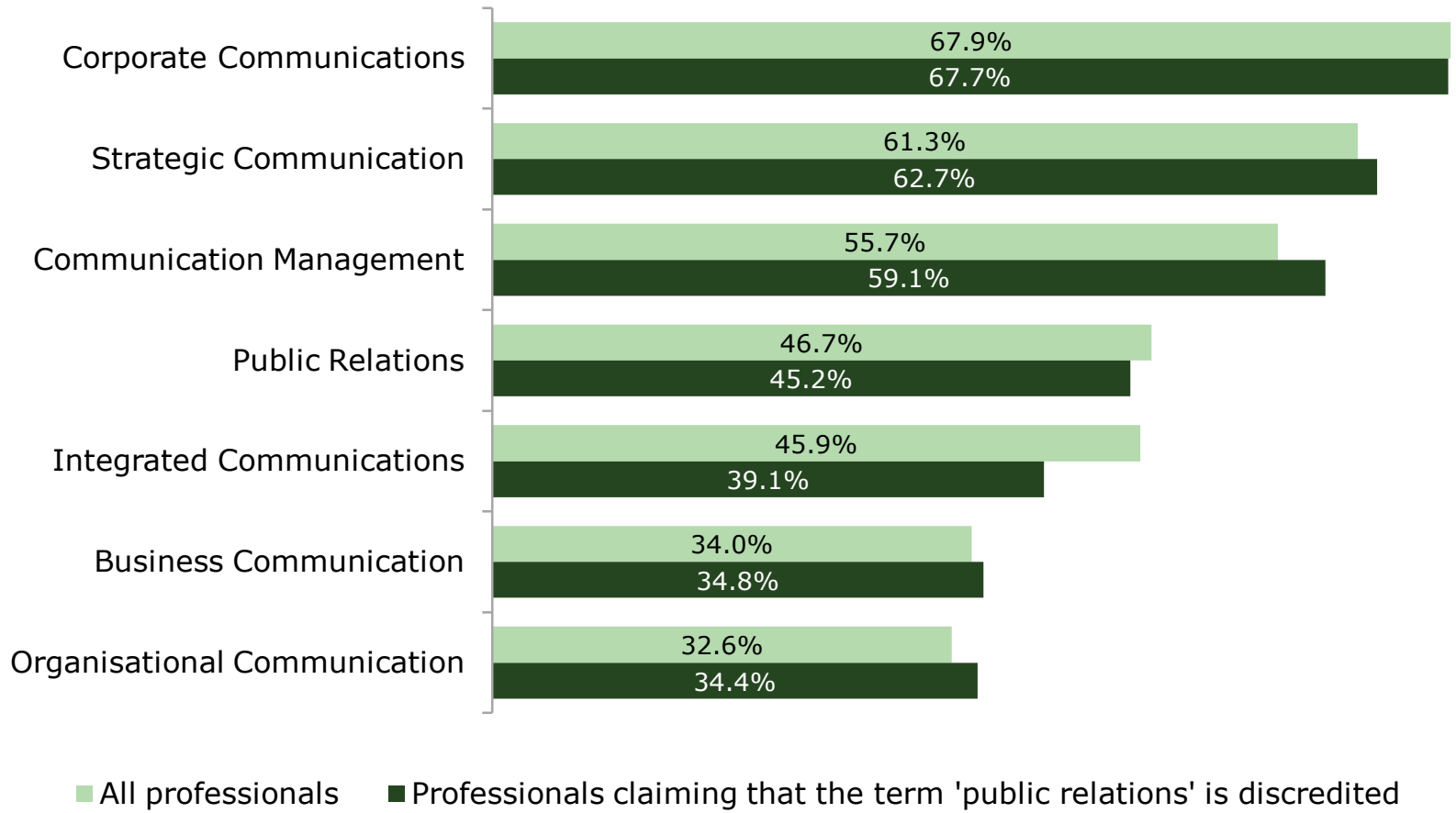
www.communicationmonitor.eu / Zerfass et al. 2011 / n = 2,209 PR professionals; Q 2: Researchers are discussing several concepts to describe the various internal and external communication activities by an organisation. How would you value these descriptions/labels? Scale 1-5 / Q 20. Items 1, 4, 5: significant differences between all types of organisations (chi-square test, p≤0.05).

# Concepts and labels for the profession are judged differently in various countries (example: UK versus Germany)



www.communicationmonitor.eu / Zerfass et al. 2011 / n = 2,209 PR professionals; Q 2: Researchers are discussing several concepts to describe the various internal and external communication activities by an organisation. How would you value these descriptions/labels? Scale 1-5 / Q 20.

# Practitioners who are sceptical of the term PR dislike 'Integrated Communications' as well



www.communicationmonitor.eu / Zerfass et al. 2011 / n = 2,209 PR professionals; Q 2: Researchers are discussing several concepts to describe the various internal and external communication activities by an organisation. How would you value these descriptions/labels? Scale 1-5, considered scale points 4-5. Linear negative correlation between discreditation of PR and suitability of the PR concept (Pearson correlation, 2-tailed, p≤0.01).

## How formal qualifications influence the approval of alternative concepts and the reputation of public relations

	Professional certificate in PR/ Communication Management	Professional certificate in other communication discipline	Academic degree in communication
Public Relations	49.1%	48.2%	47.0%
Integrated Communications	50.0%	49.6%	47.9%
Business Communication	35.7%	40.3%	33.7%
Corporate Communications	68,4%	66,4%	68.9%
Organisational Communication	33.4%	35.6%	35.9%
Communication Management	58.7%	56.9%	57.9%
Strategic Communication	62.5%	64.4%	62.3%
<i>The term public relations is discredited</i>	42.6%	37.5%	41.5%

## Interpretation

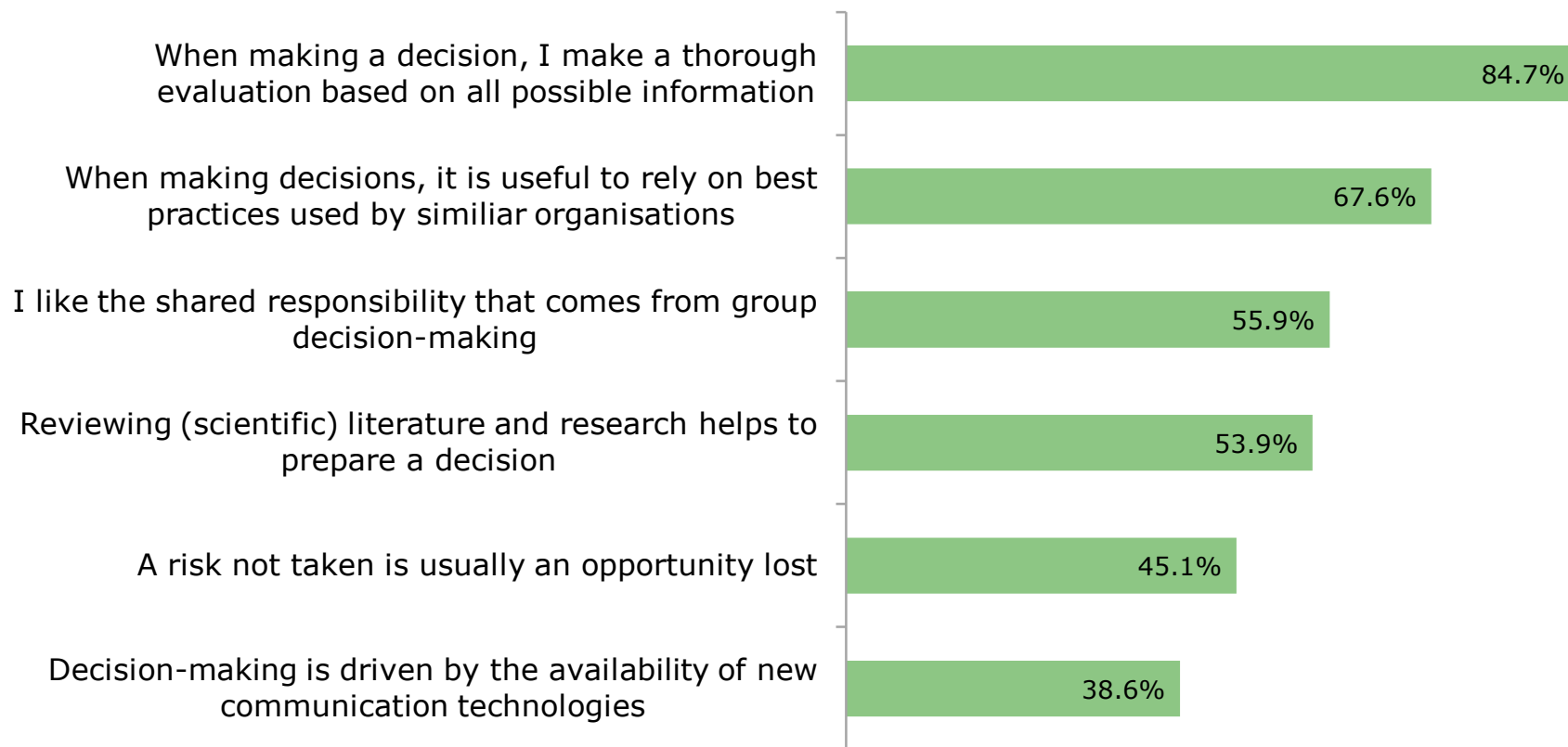
### **Negative reputation of public relations calls for new concepts and labels**

- Across Europe, communication professionals report negative connotations of 'public relations' in the mass media. The image of PR is especially bad in Poland, the United Kingdom, Norway, Croatia, Denmark, Slovenia, Serbia and Germany. Even in the rest of Europe at least three out of ten practitioners report negative perceptions of the term.
- Negative connotations of PR in the media damage the reputation of communication professionals as well as trust in their activities. Further research, i. e. media content analysis, may prove these perceptions and provide more detailed insights.
- The survey reveals a significant correlation between the media image and the disreputability of 'public relations' as a term and overall concept. PR is partly discredited in most European countries, especially in Eastern and Southern Europe, but also in Norway and Germany.
- As a consequence, most communication professionals favour alternative labels for the profession – especially corporate communications, strategic communication and communication management.
- When comparing the acceptance within different types of organisations, 'corporate communications' is leading the field across the respondent groups, while 'strategic communication' is the second most popular label.
- The terms 'integrated communication' and 'organisational communication', often used in the academic realm, are less popular for the professional field.
- The approval of alternative concepts is not significantly influenced by the formal qualifications of communication professionals.

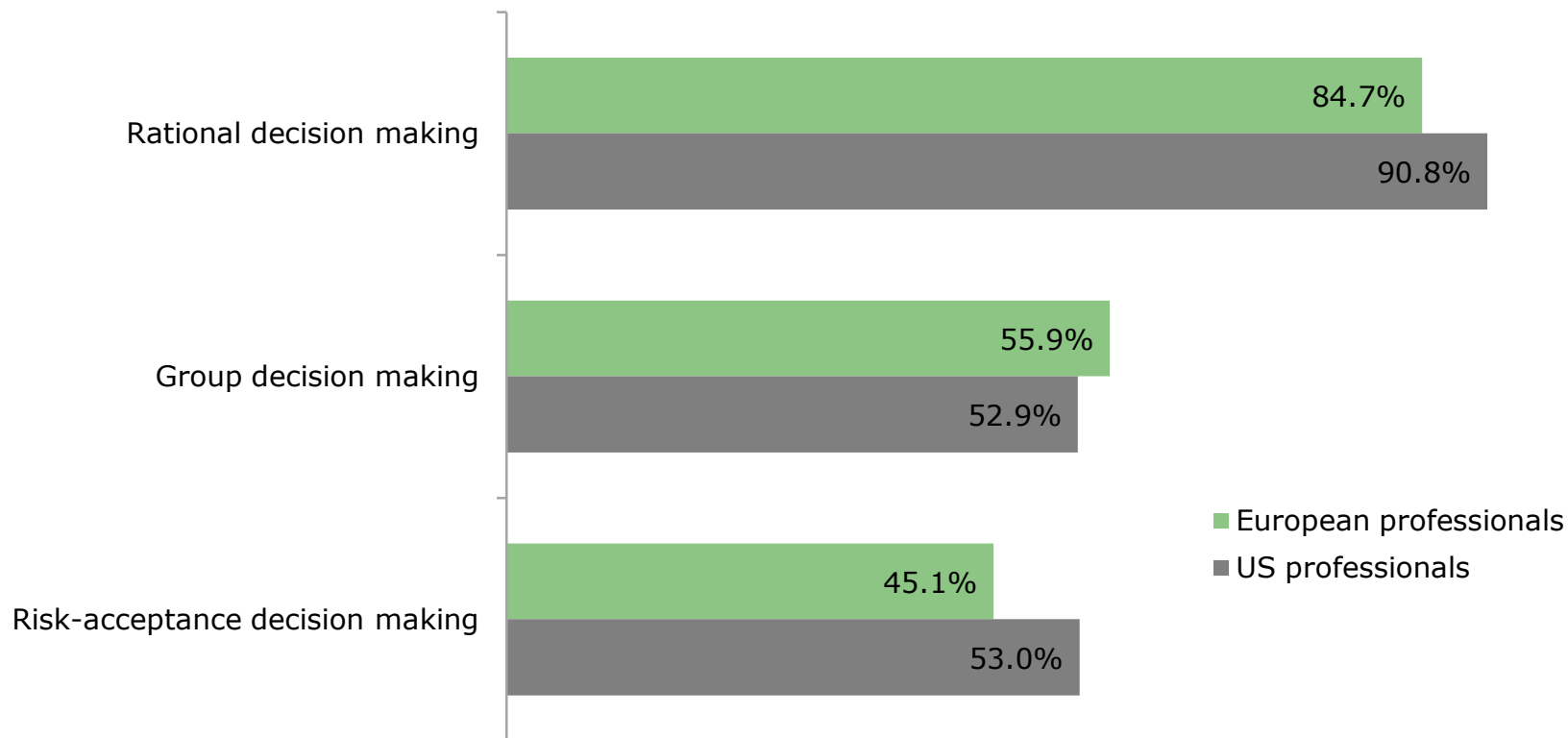


Decision making, leadership style and role enactment

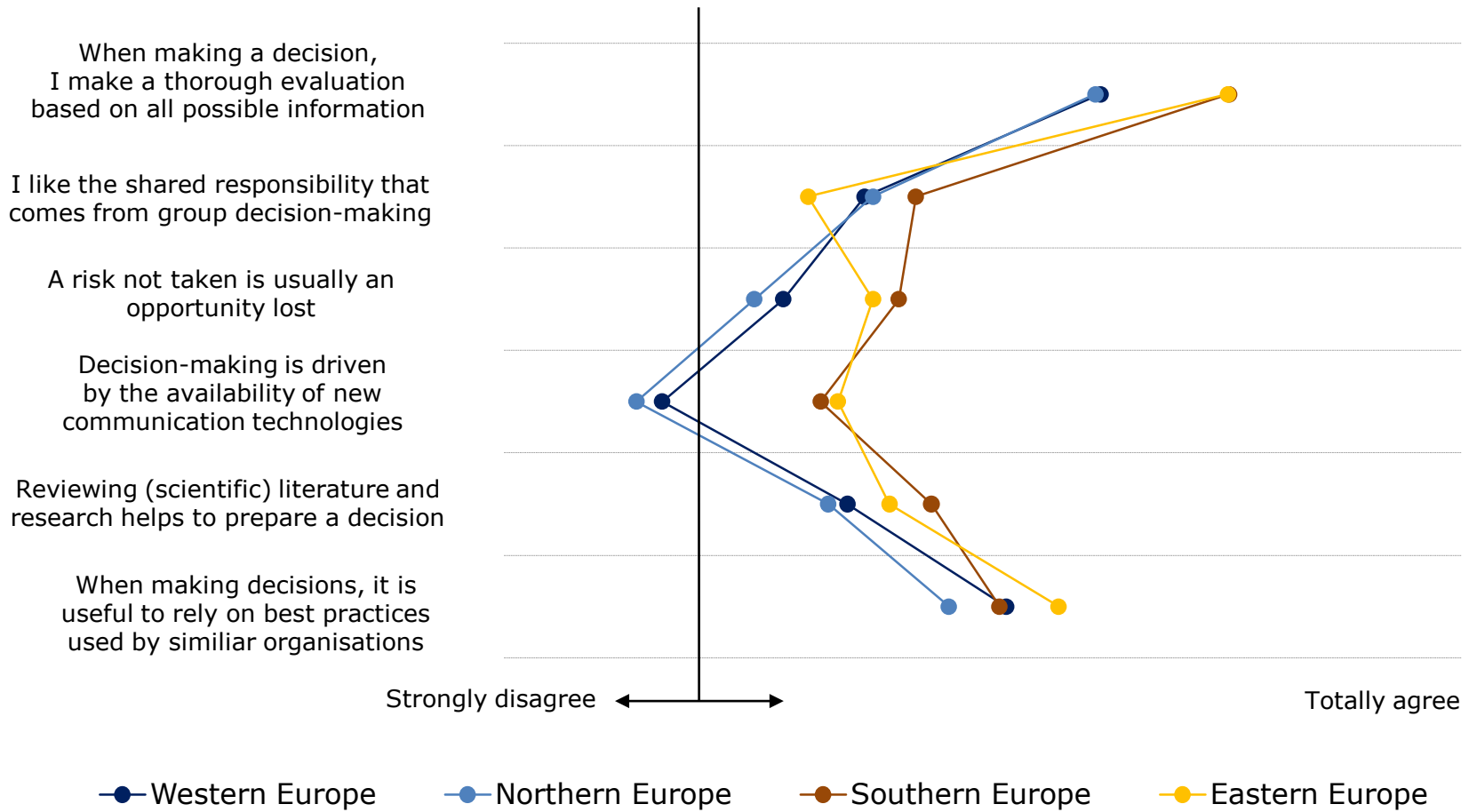
## Decision making: Most professionals rely on rational approaches and best practices, only a minority takes risks



## European professionals have a different decision-making profile than their counterparts in the United States



# Types of decision making in European regions



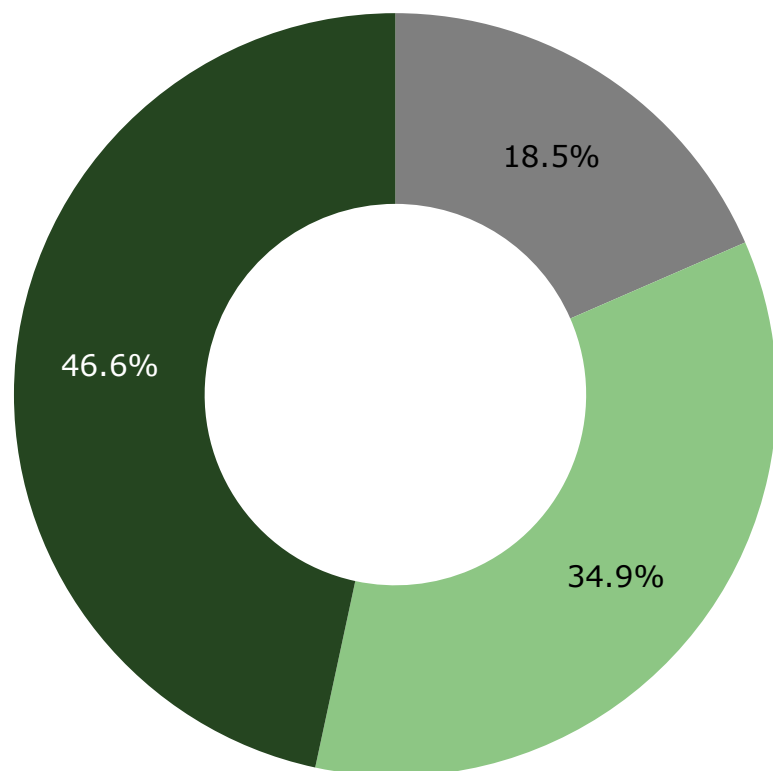
## Styles of decision making in different types of organisations

	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations
<b>Rational decision making</b> When making a decision, I make a thorough evaluation based on all possible information	83.5%	85.1%	82.4%	76.7%
<b>Group decision making</b> I like the shared responsibility that comes from group decision-making	55.5%	51.5%	56.7%	60.4%
<b>Risk-acceptance decision making</b> A risk not taken is usually an opportunity lost	46.4%	44.0%	38.1%	42.5%
<b>Technology-oriented decision making</b> Decision-making is driven by the availability of new communication technologies	37.4%	36.3%	41.7%	35.0%
<b>Research-oriented decision making</b> Reviewing (scientific) literature and research helps to prepare a decision	47.9%	51.2%	57.1%	54.6%
<b>Best practices-oriented decision making</b> When making decisions, it is useful to rely on best practices used by similar organisations	68.6%	67.4%	72.8%	66.3%

## Types of decision making in European countries

	Rational	Group	Risk	Technology	Scientific research	Best practices
Switzerland	4.21	3.33	3.16	2.88	3.20	3.82
Germany	3.99	3.18	3.16	2.93	3.29	3.74
Netherlands	3.79	3.45	3.48	2.80	3.36	3.78
Belgium	4.12	3.62	3.12	2.91	3.59	3.75
France	4.32	3.73	3.39	3.17	3.52	3.92
United Kingdom	4.27	3.36	3.22	2.65	3.43	3.53
Norway	3.85	3.67	3.16	3.00	3.60	3.71
Sweden	4.07	3.60	3.17	3.16	3.30	3.81
Denmark	3.71	3.52	2.26	2.77	2.29	3.73
Italy	4.42	3.76	3.53	3.40	3.64	3.77
Serbia	4.41	3.57	3.39	3.38	3.71	3.80
Croatia	4.37	3.29	3.67	3.41	3.60	3.84
Slovenia	4.19	3.18	3.38	3.23	3.49	3.73
Spain	4.45	3.83	3.84	3.42	3.65	3.88
Poland	4.24	3.23	3.53	3.50	3.56	4.02

# Leadership style: Involving team members is the predominant approach utilised by communication professionals



- Transactional Leadership: drawing on authority, reminding followers of common standards
- Transformational Leadership: defining a vision, appealing to followers' ideals and standards
- Inclusive Leadership: naming challenges, involving followers in shared decision making

## Leadership style in different types of organisations

	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations	Agencies/ Consultancies
<b>Transactional</b> Leaders draw on their authority and remind followers of common standards	17.2%	17.9%	29.8%	20.8%	13.7%
<b>Transformational</b> Leaders define a vision and appeal to followers' ideals and values	36.4%	35.8%	32.7%	31.7%	35.2%
<b>Inclusive</b> Leaders name challenges and involve followers in shared decision making	46.4%	46.3%	37.5%	47.5%	51.2%

## Organisational culture and leadership style are interdependent

	Transactional Leadership	Transformational Leadership	Inclusive Leadership
Integrated culture (participative – proactive)	11.8%	35.9%	52.4%
Interactive culture (participative – reactive)	20.9%	33.6%	45.5%
Entrepreneurial culture (non-participative – proactive)	20.8%	49.1%	30.2%
Systematised culture (non-participative – reactive)	46.5%	26.9%	26.6%

Strategic contribution: Most communication professionals strive to support overall goals, a rising number also tries to define them

90.8%

focus on supporting business goals by  
planning and executing communication

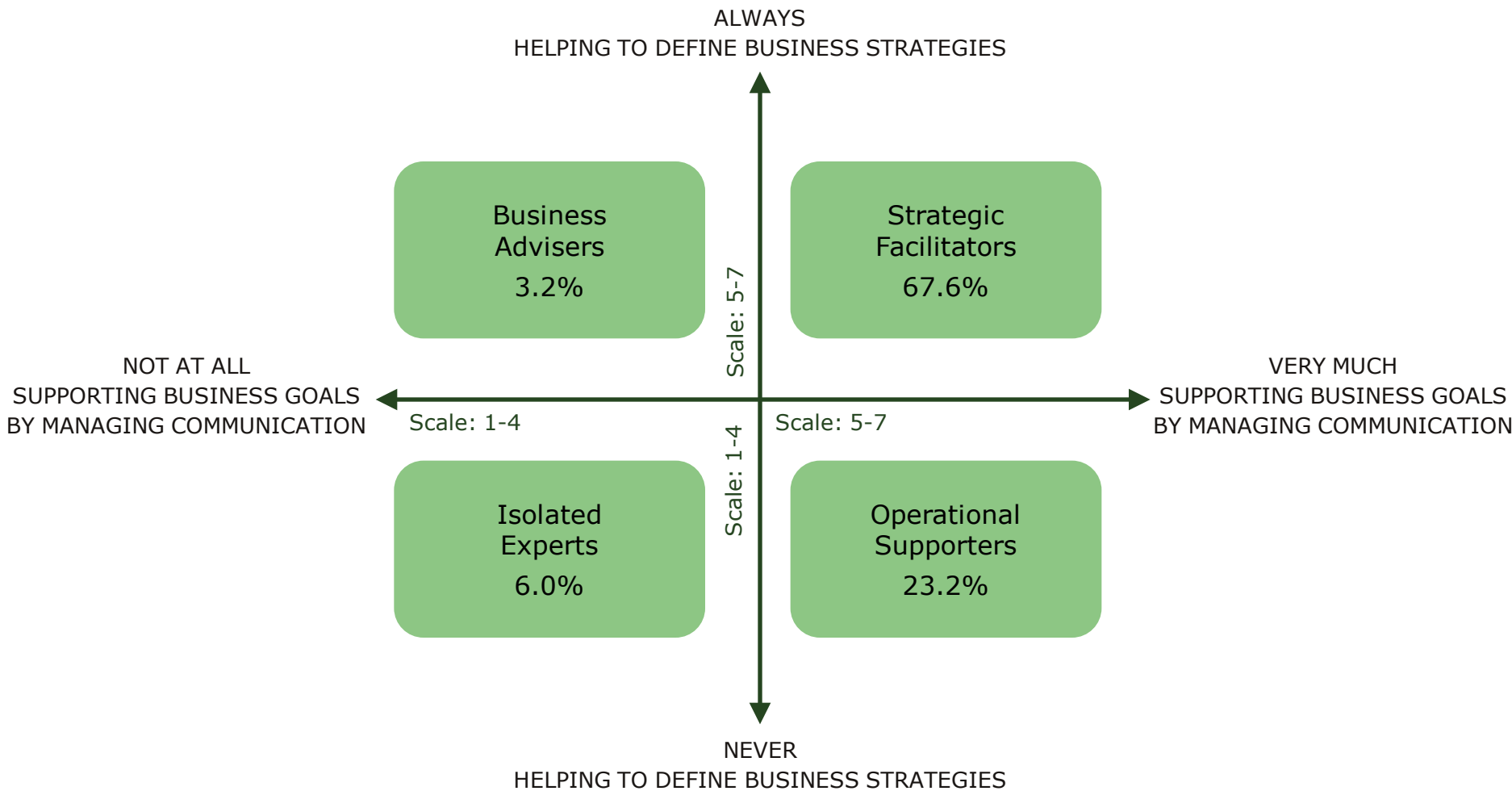
(+5.4% compared to 2010, +6% compared to 2009)

70.8%

feel responsible for helping to define business strategies

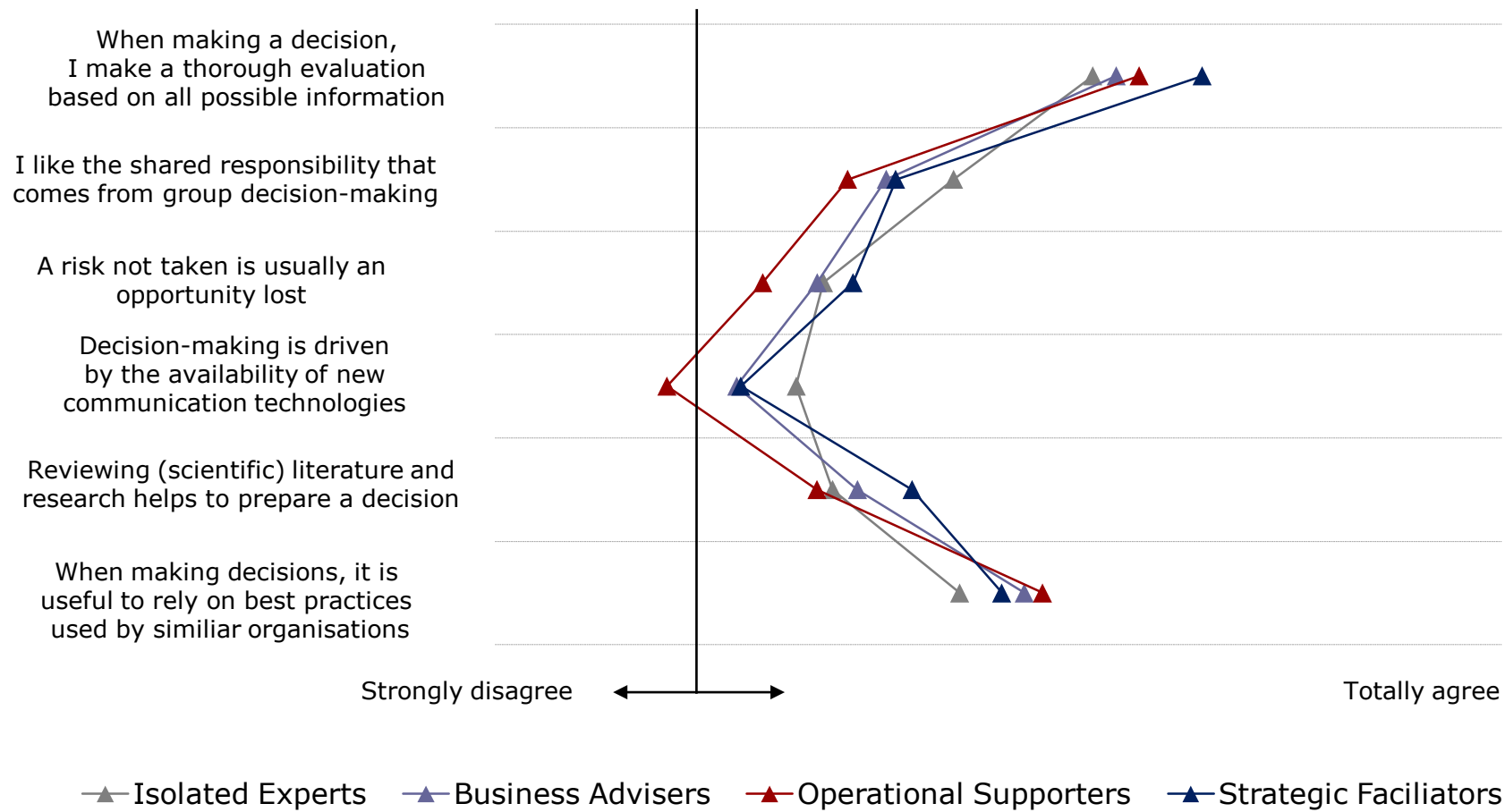
(+8.3% compared to 2010, +10,1% compared to 2009)

# Professional roles: Most practitioners act as strategic facilitators or operational supporters



www.communicationmonitor.eu / Zerfass et al. 2011 / n = 2,209 PR professionals; Q 4: In your daily work, how much do you focus on supporting business goals by planning and executing communication? (1 = Not at all; 7 = Very much) / ... do you feel responsible for helping to define business strategies? (1 = Never; 7 = Always).

# All professional roles tend to use rational decision making; operational supporters are risk-averse and copy best practices



## Distribution of professional roles in European regions

	Northern Europe	Western Europe	Southern Europe	Eastern Europe
Strategic Facilitators	72.0%	65.3%	66.8%	64.9%
Operational Supporters	22.2%	26.2%	20.0%	27.7%
Business Advisers	1.8%	3.3%	4.6%	2.2%
Isolated Experts	4.1%	5.3%	8.7%	5.2%

## Interpretation

### **Inclusive leadership and risk-averse decision making are predominant**

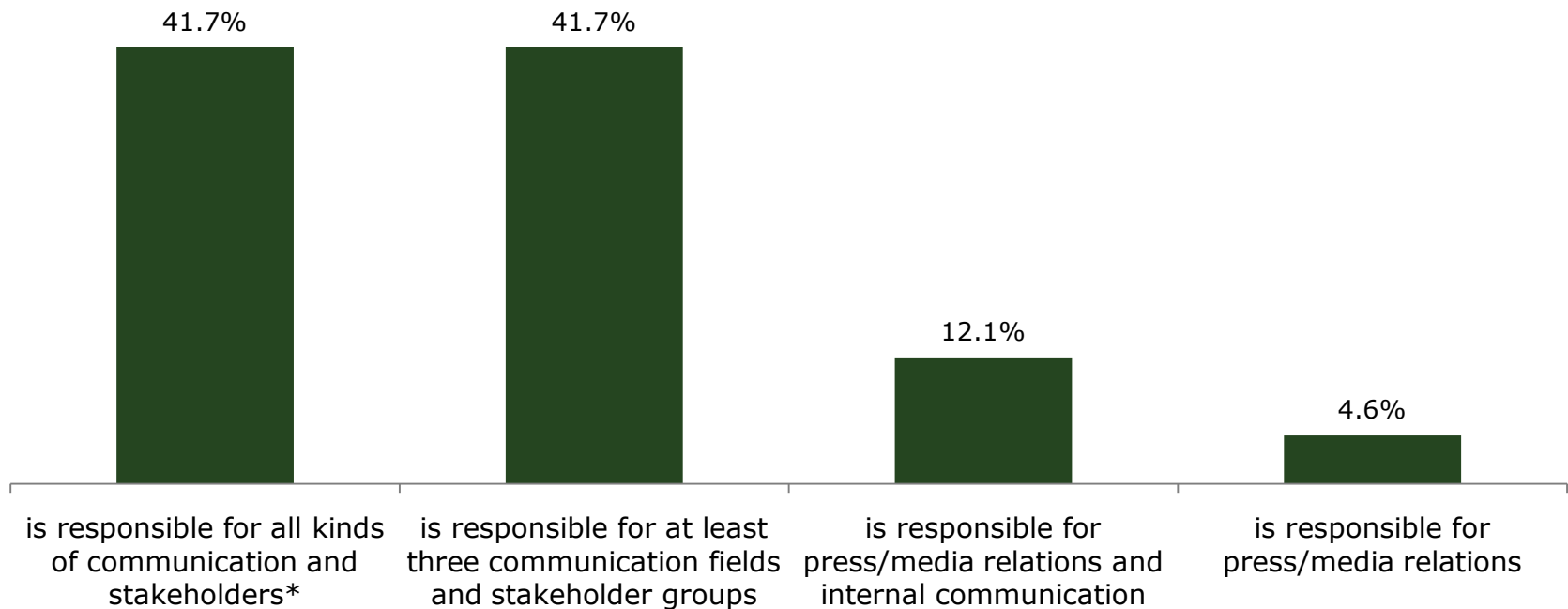
- Patterns of decision making utilised by European communication professionals differ from the behaviour of their counterparts in the United States. Both groups prefer rational decision making based on an evaluation of all information available. Only a minority of practitioners in Europe accepts that a risk not taken is an opportunity lost. However, the shared responsibility offered by group-decision making is more popular than in the US.
- Along this line, almost every second respondent reports a predominance for the inclusive leadership style, which means that leaders involve followers in shared decision making.
- Practitioners in non-profit organisations use significantly different ways of decision making and leadership. Rational decisions are less common and an inclusive leadership style is prevalent.
- 67.8 per cent of communication professionals identify themselves with the advanced 'strategic facilitator' role, meaning that they support organisational goals by executing communication on the one hand whilst also helping to define business strategies. This number has risen by 10 per cent within the last two years. When making decisions, strategic facilitators are more rational, research-based and risk-friendly. Operational supporters are the second most important role. Only 6 per cent of the professionals act as isolated experts who do not contribute to strategic goals at all. This role is more common in Southern Europe than in any other region.



Power of communication departments

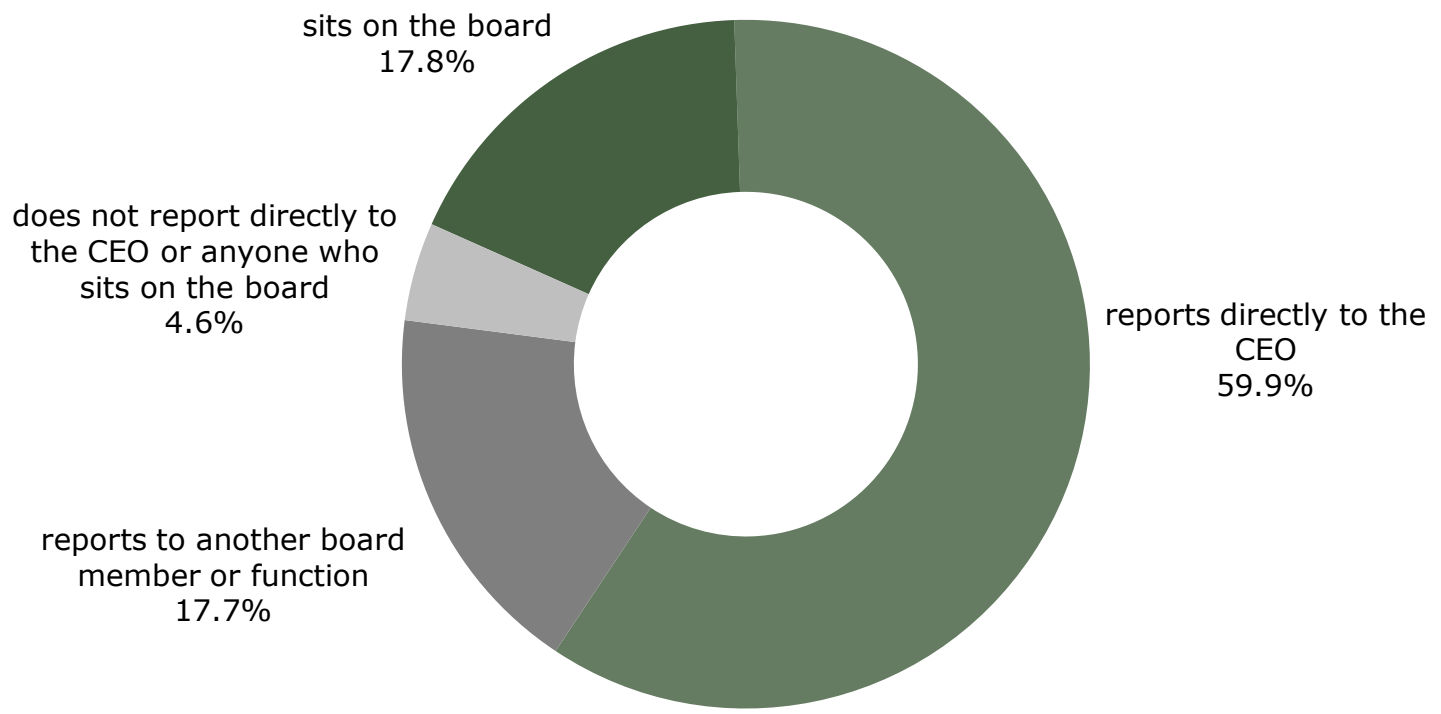
## Formal power of the communication function: In most organisations, communication leaders have a broad level of responsibility

The top communication manager within the organisation ...

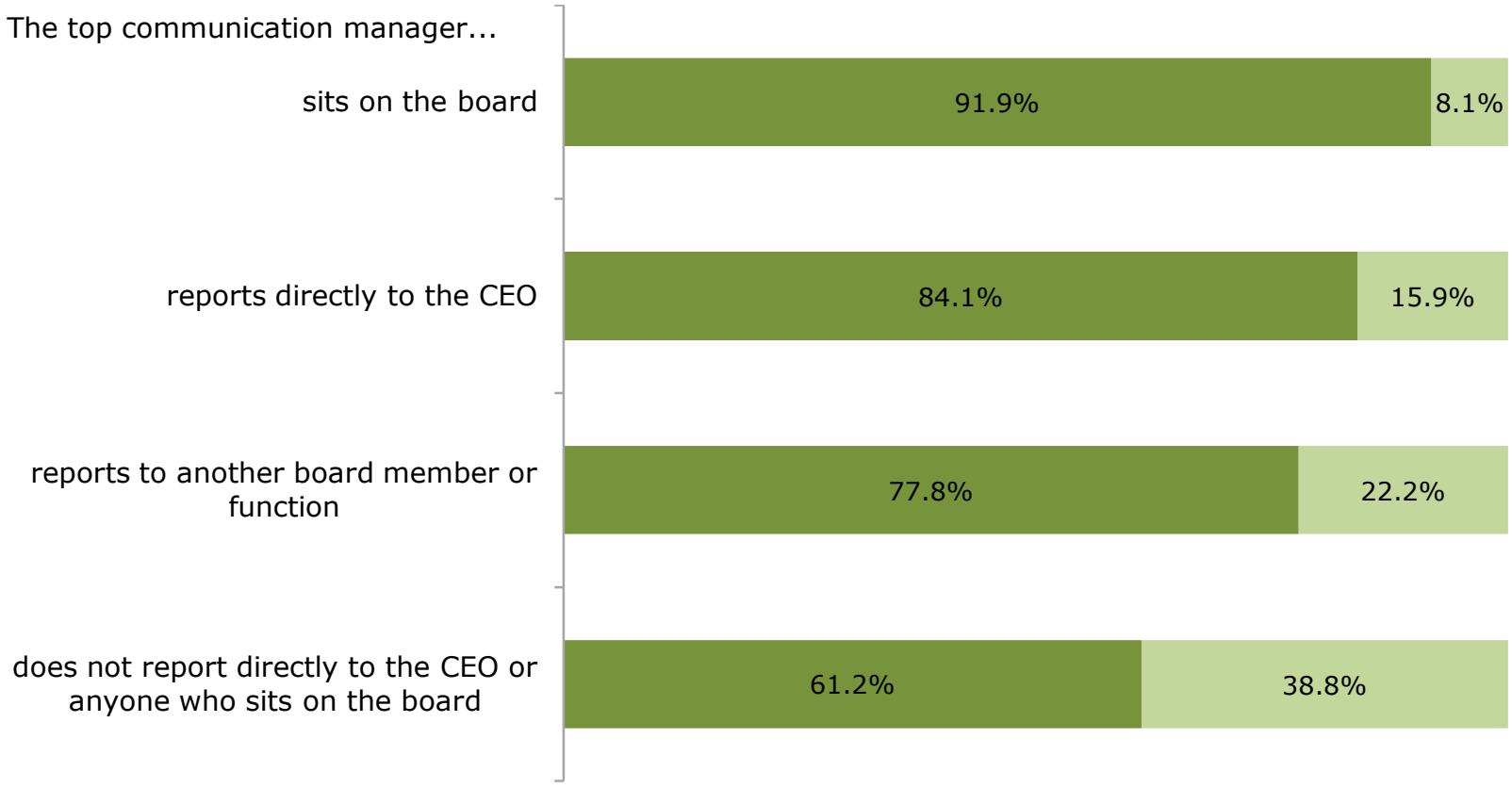


# Reporting lines and hierarchy: The majority of top level communication managers reports directly to the CEO

The top communication manager within the organisation ...

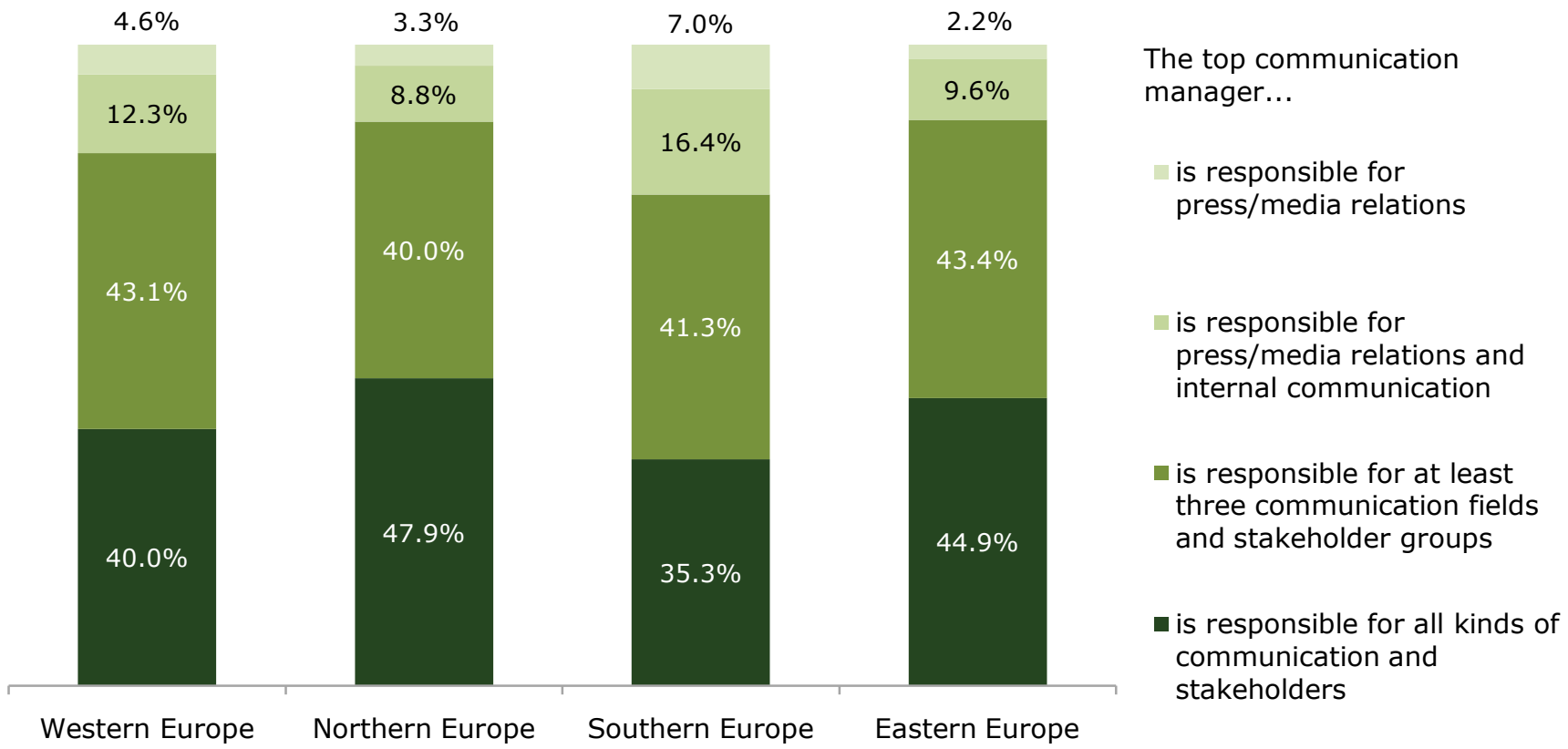


# Reporting lines and responsibilities are correlated with each other

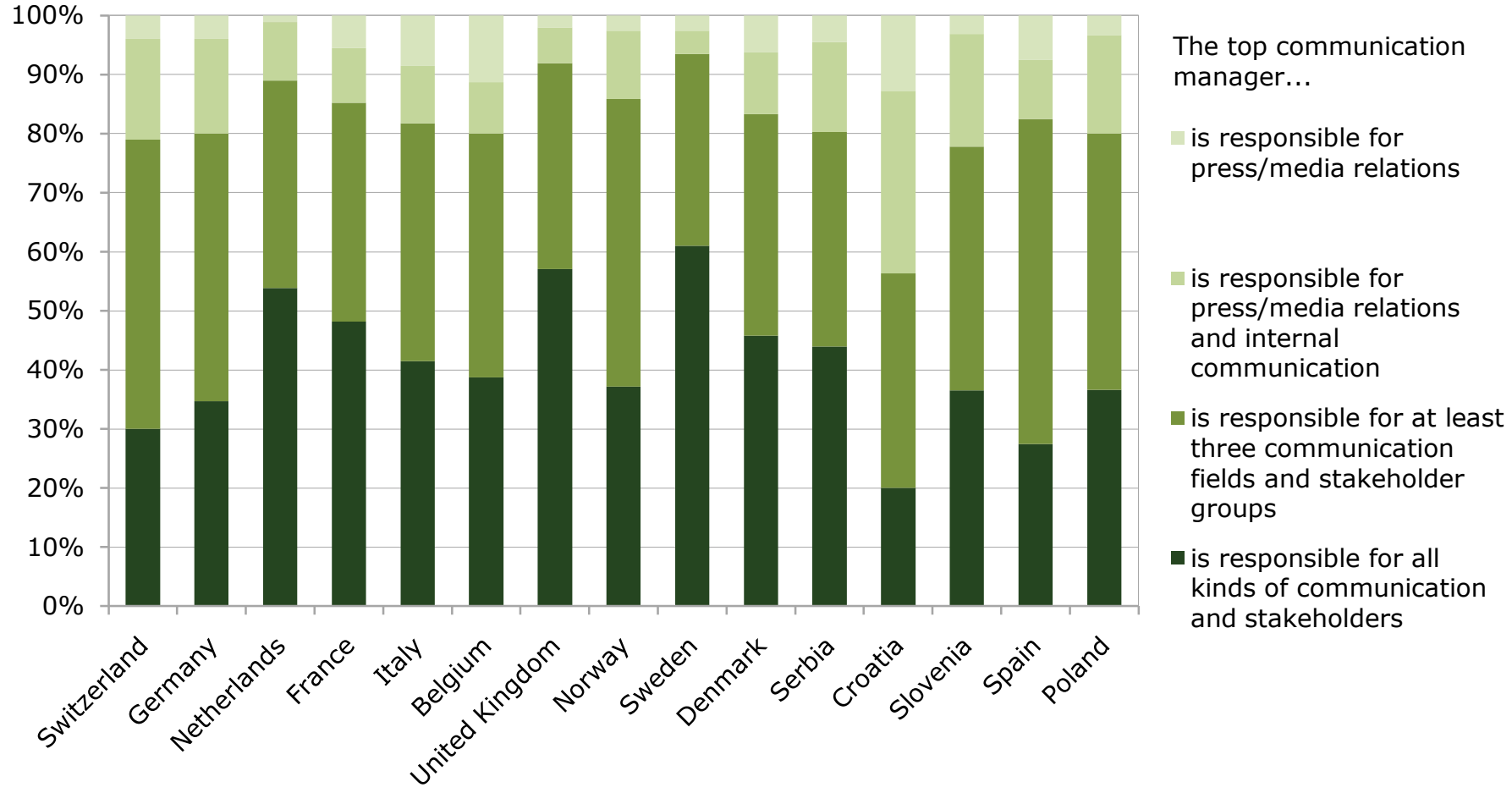


- is responsible for all or at least three communication fields
- is responsible for media relations or media relations and internal communication

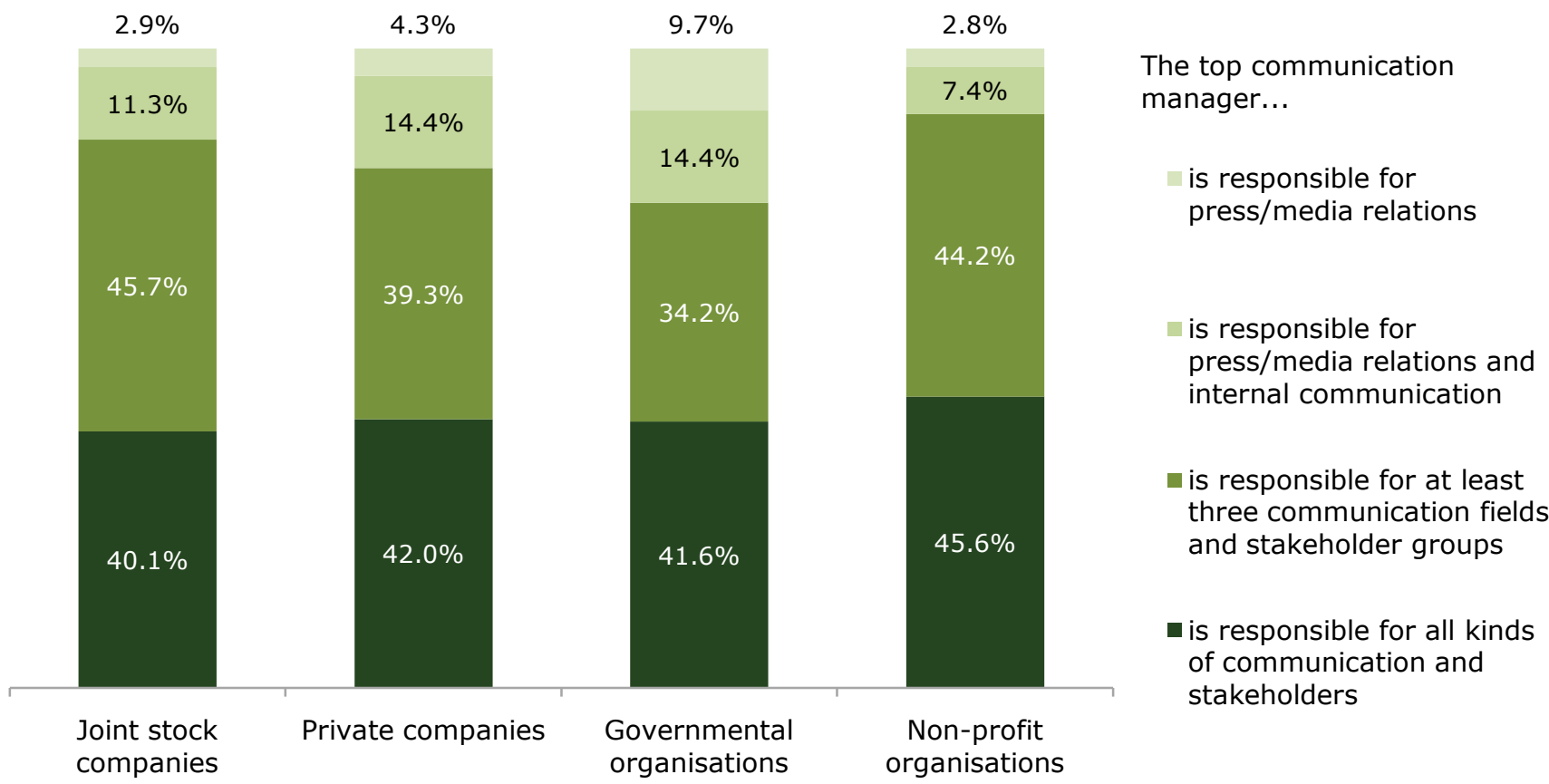
# Levels of responsibility differ significantly within European regions



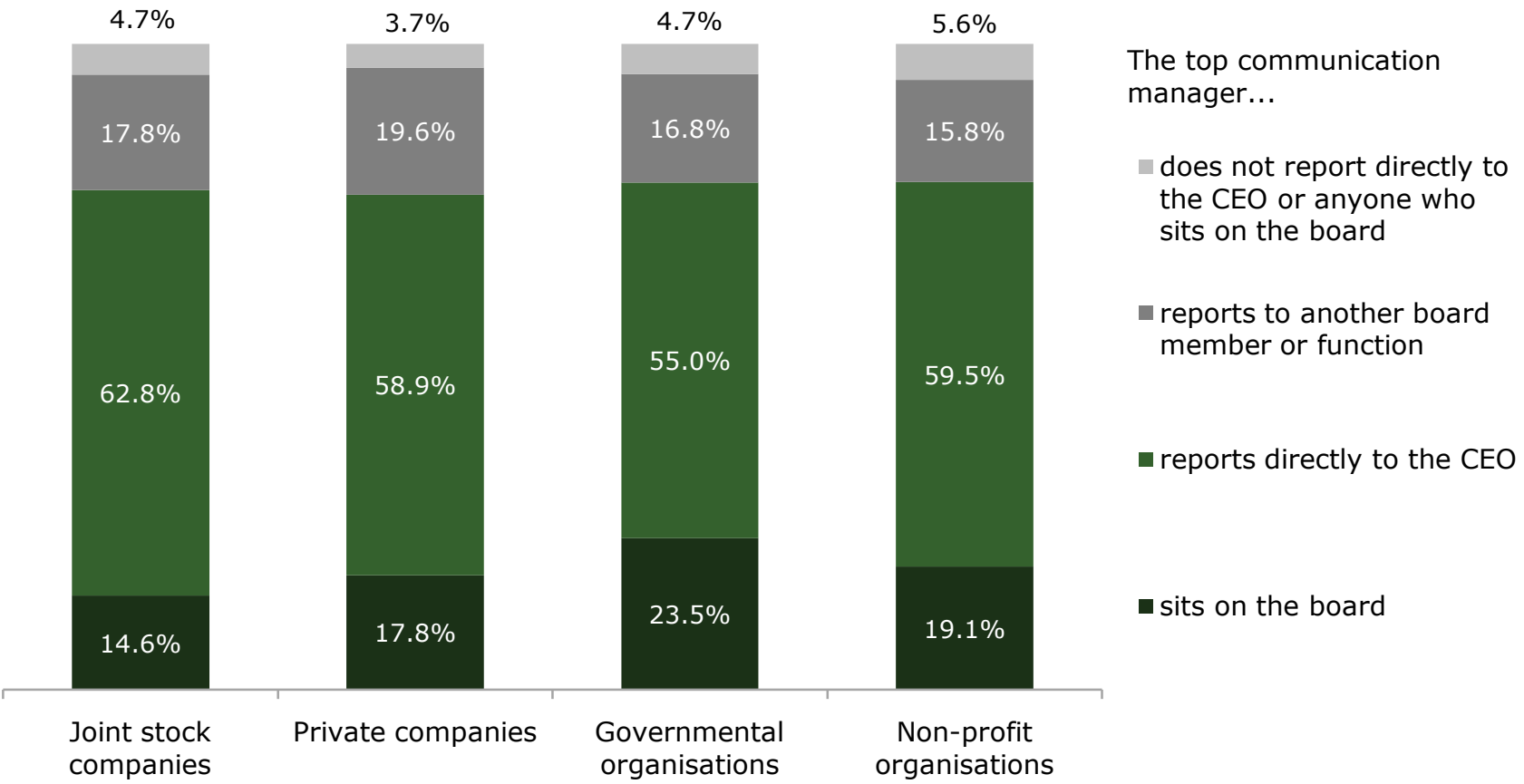
# Top communication managers in Sweden, the Netherlands and the UK tend to have a wider range of responsibilities



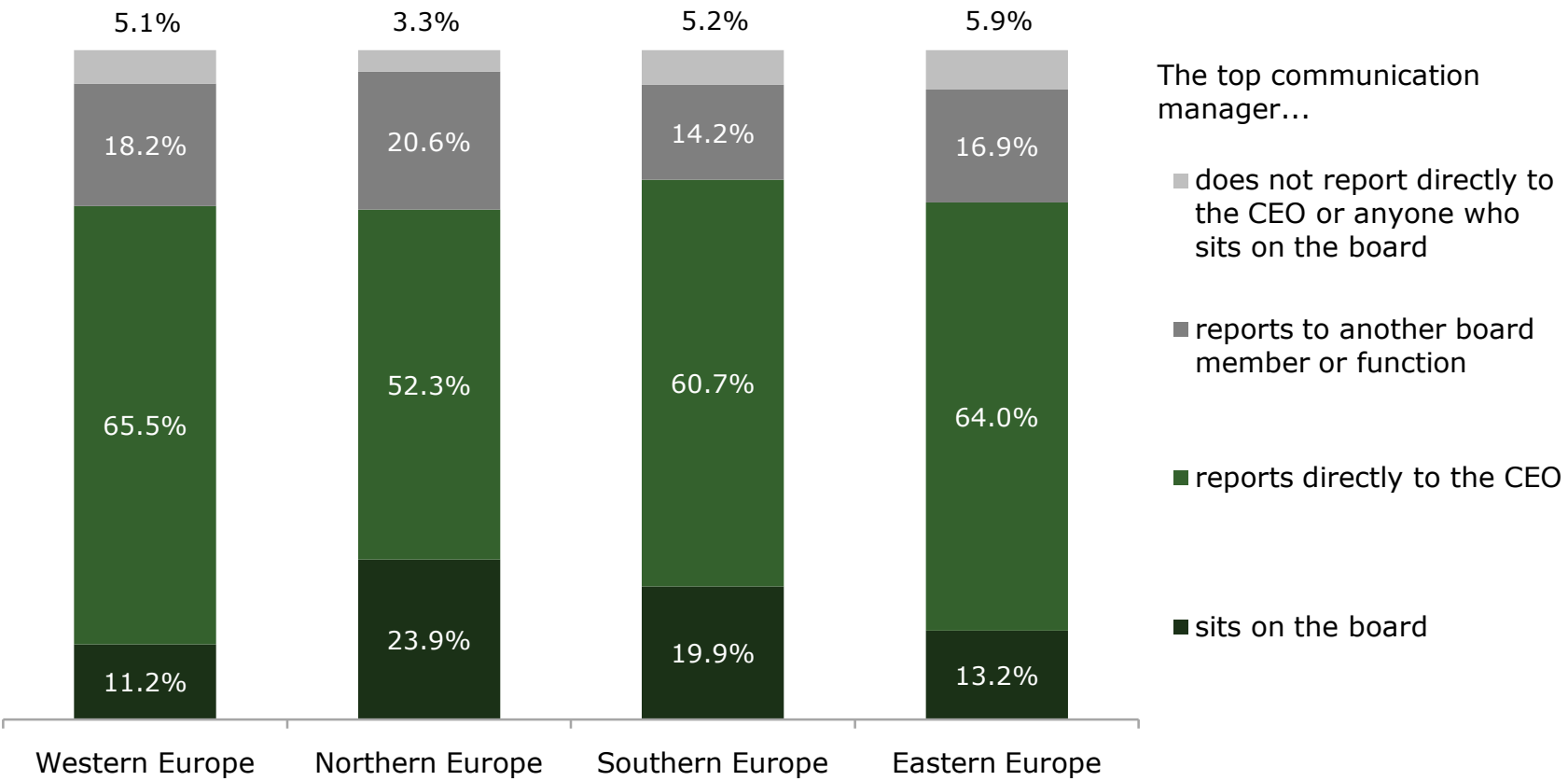
# In governmental organisations, one out of ten communication managers is merely responsible for media relations



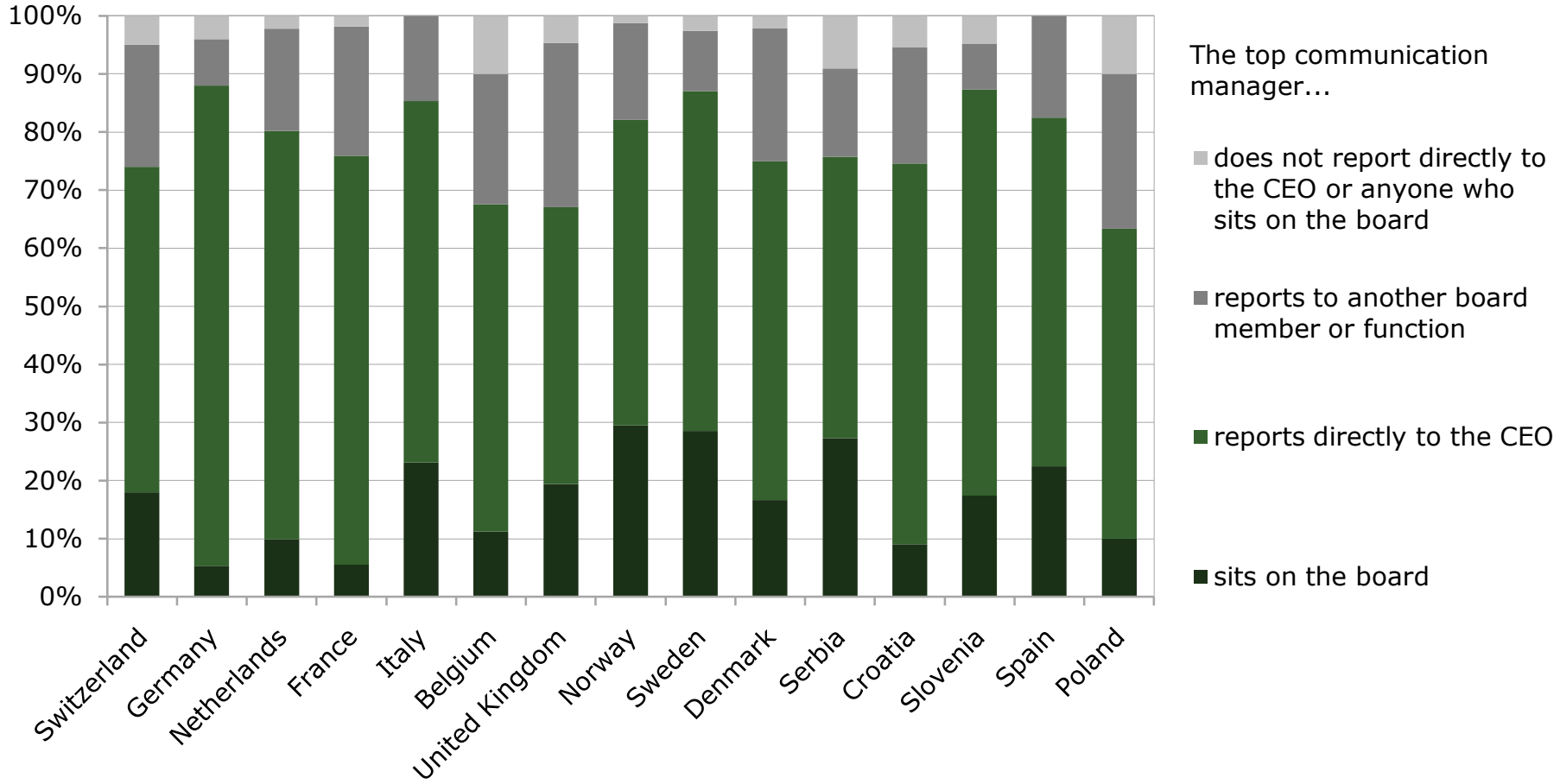
# Reporting lines do not differ significantly between various types of organisations



# In Northern European countries, a quarter of the top level communicators sit on the board

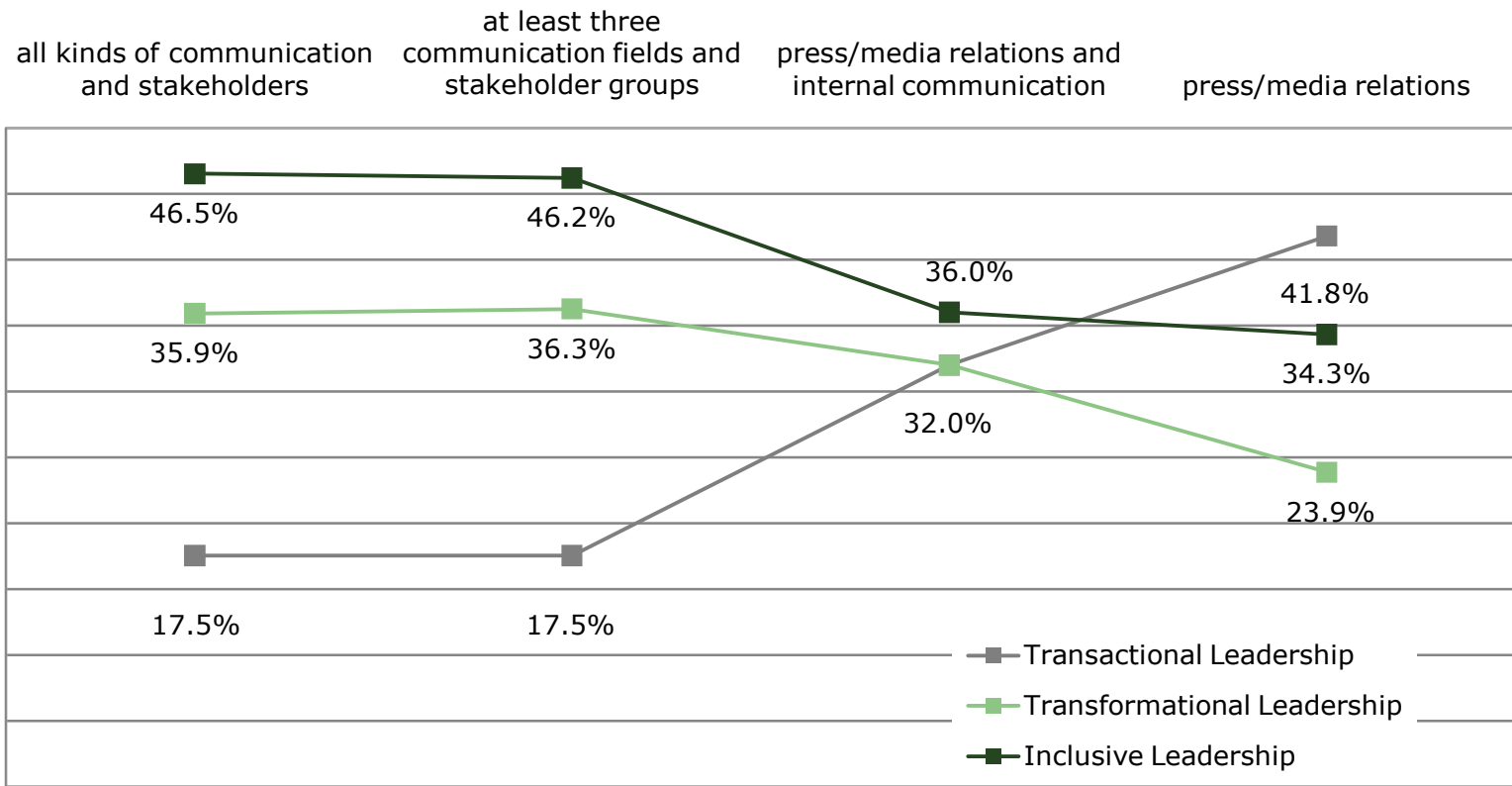


# Top communication managers in Germany and France are least likely to hold a board position



# Top communication managers tend to apply the inclusive leadership style if they have a broader area of responsibility

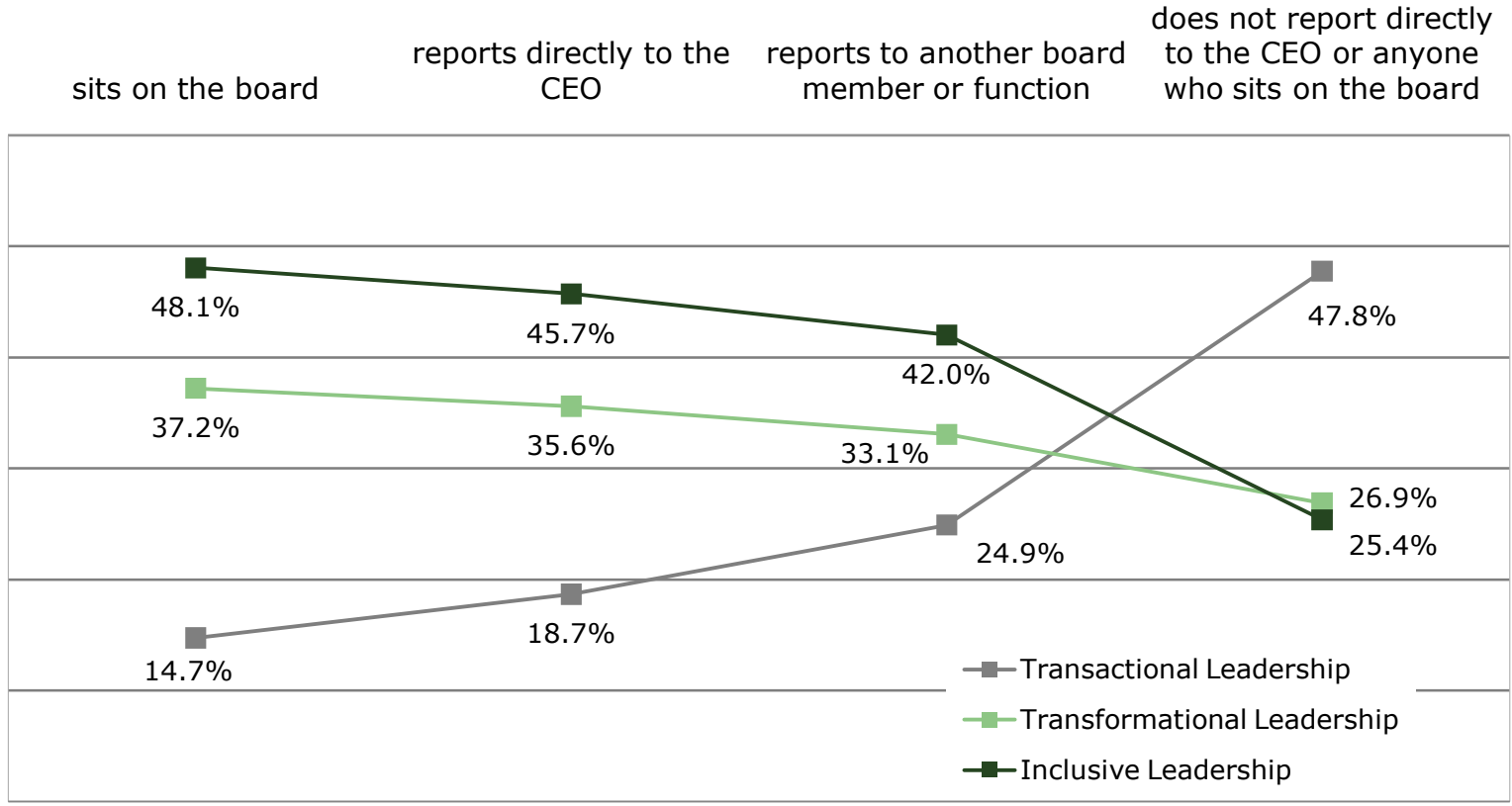
The top communication manager is responsible for ...



www.communicationmonitor.eu / Zerfass et al. 2011 / n = 1,450 PR professionals in communication departments; Q 19: How would you describe the dominant strategy used by leaders in your communication department to achieve common goals? / Q 5. Significant differences between the four groups (chi-square test, p≤0.05).

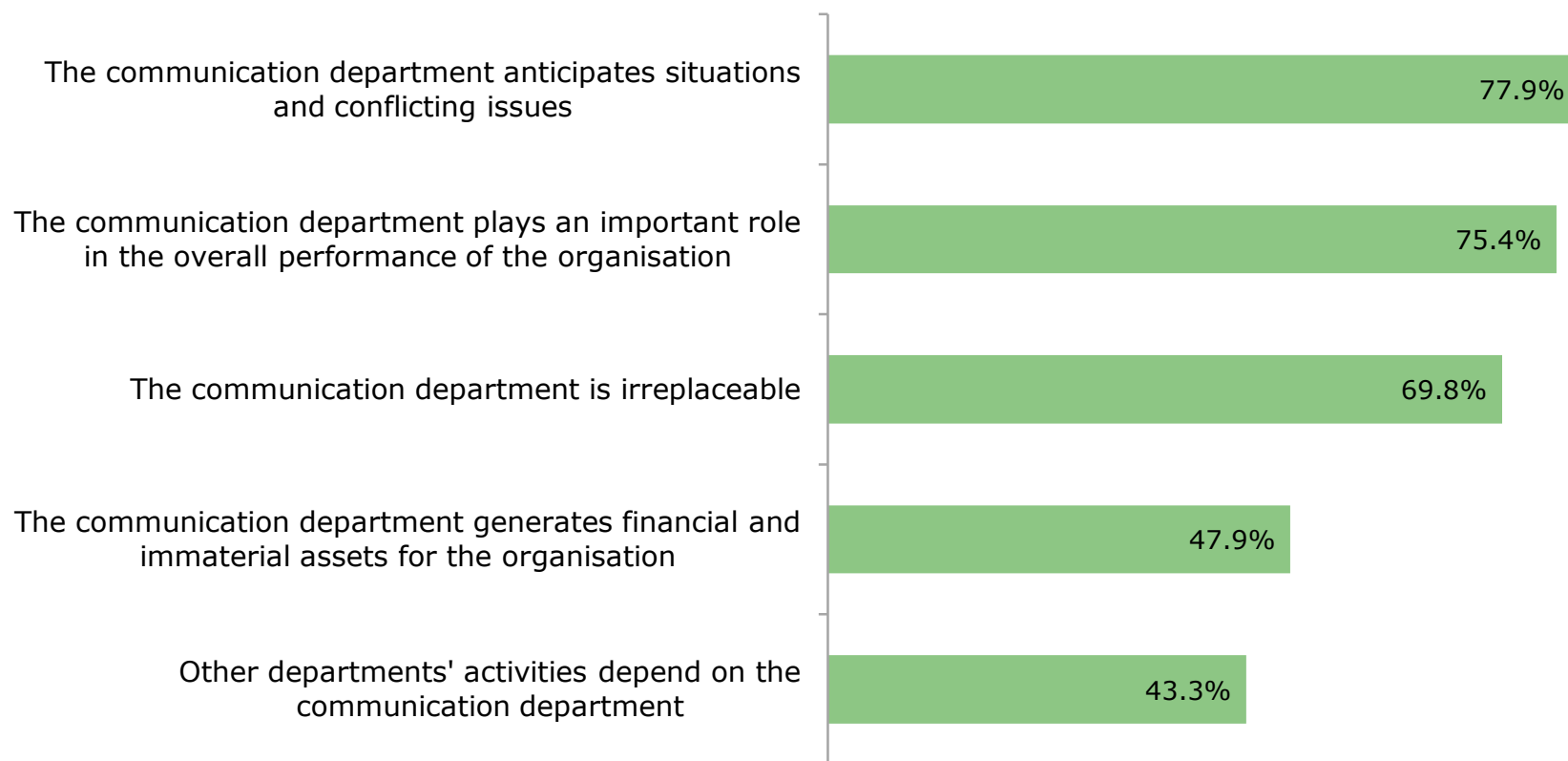
# Leaders tend to apply the inclusive leadership style if they sit on the board or report directly to the CEO

The top communication manager ...



www.communicationmonitor.eu / Zerfass et al. 2011 / n = 1,450 PR professionals in communication departments; Q 19: How would you describe the dominant strategy used by leaders in your communication department to achieve common goals? / Q 5. Significant differences between the four groups (chi-square test, p≤0.05).

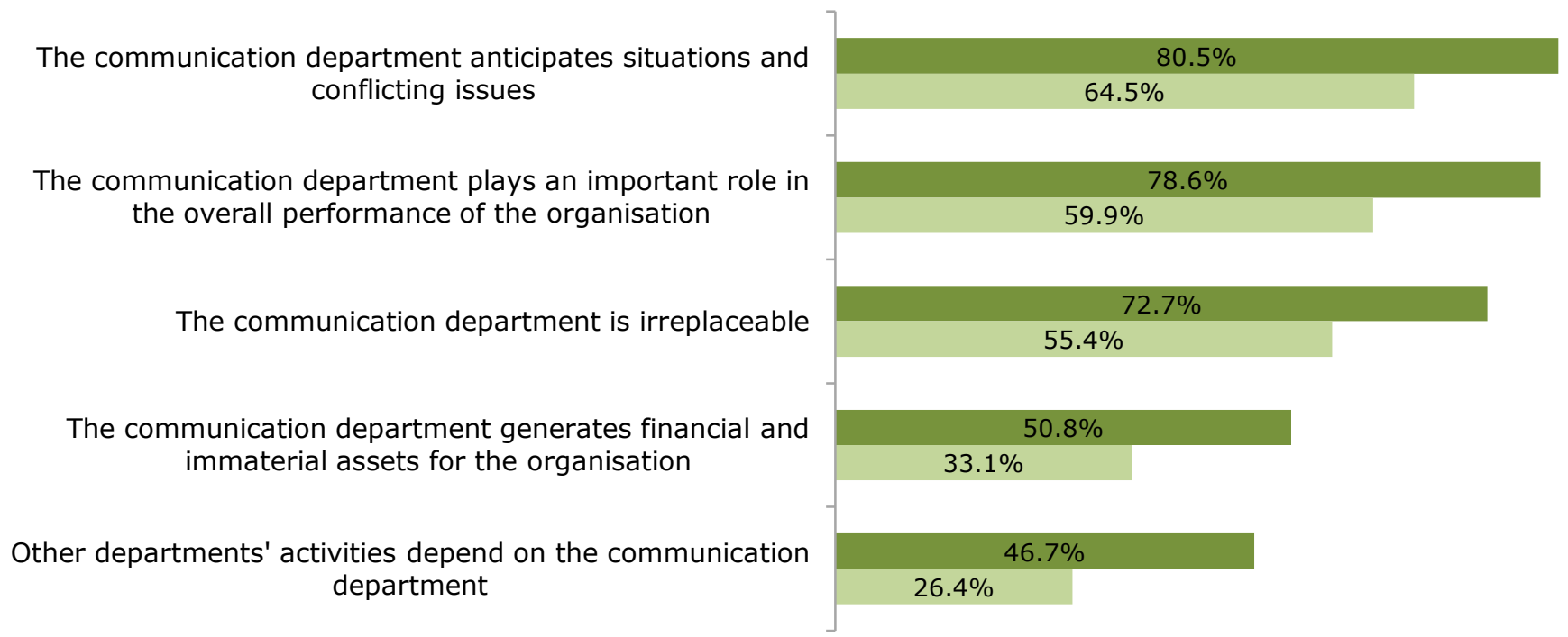
## Horizontal power of communication departments is rather low; only a minority generates financial and immaterial assets



## Anticipating situations and conflicting issues strengthens the internal position of communication departments

	The communication department plays an important role in the overall performance of the organisation	The communication department is irreplaceable
The communication department anticipates situations and conflicting issues	.463	.442
The communication department generates financial and immaterial assets for the organisation	.378	.265

# The horizontal power of communication departments is stronger if the top communication manager has broader responsibilities



The top communication manager is responsible ...

- for all or at least three communication fields
- for media relations or media relations and internal communication

www.communicationmonitor.eu / Zerfass et al. 2011 / n = 1,450 PR professionals in communication departments; Q 6: How would you describe the position of the communication department in your organisation? Scale 1 (= Strongly disagree) – 5 (= Totally agree), considered scale points 4-5 / Q 5.

## Influence of communication professionals in Europe: Three out of four are trusted advisers and involved in planning

77.9%

are taken seriously by senior management (advisory influence)

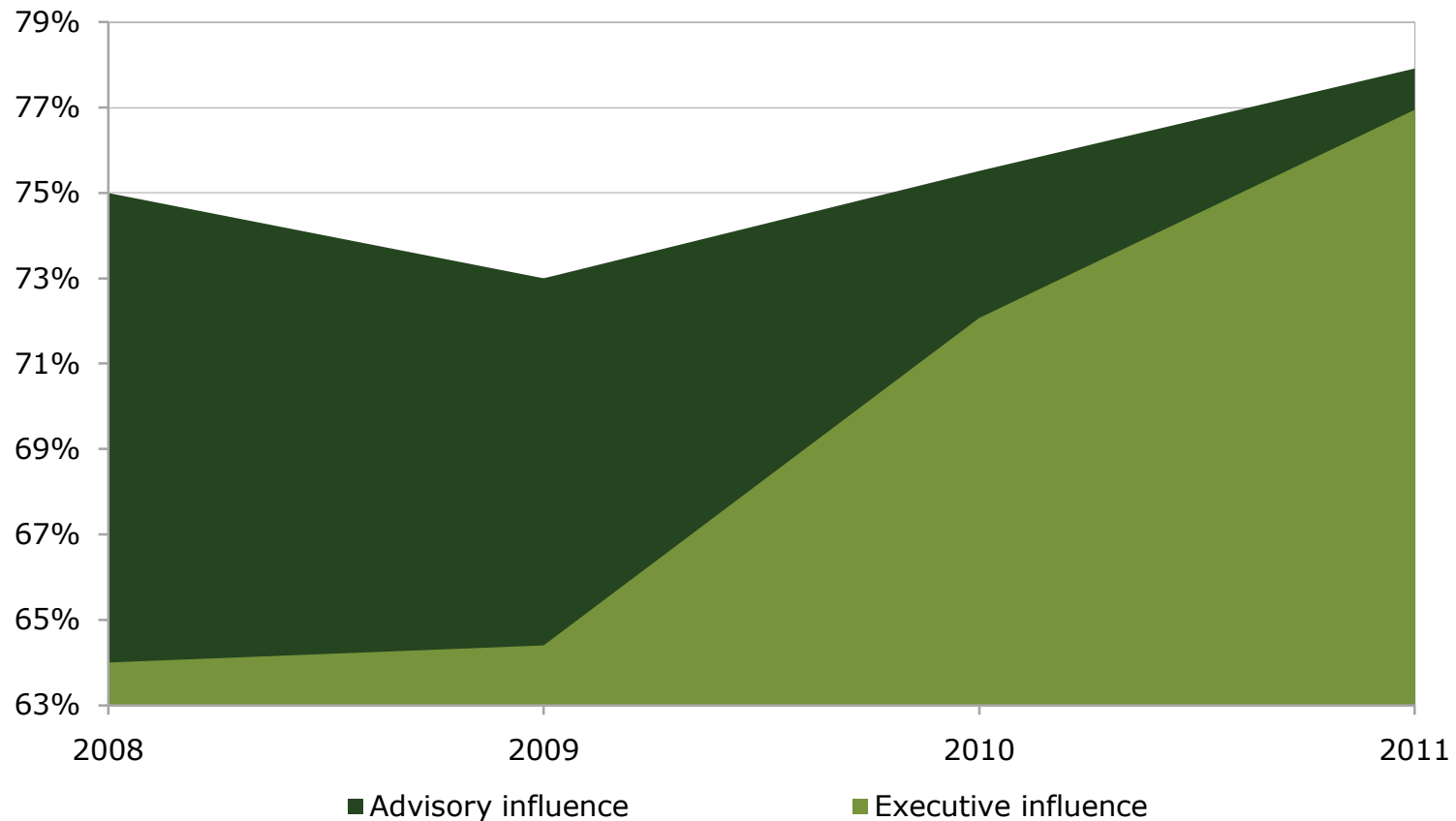
+2.4% compared to 2010

76.9%

are likely to be invited to senior-level meetings dealing  
with organisational strategic planning (executive influence)

+4.8% compared to 2010

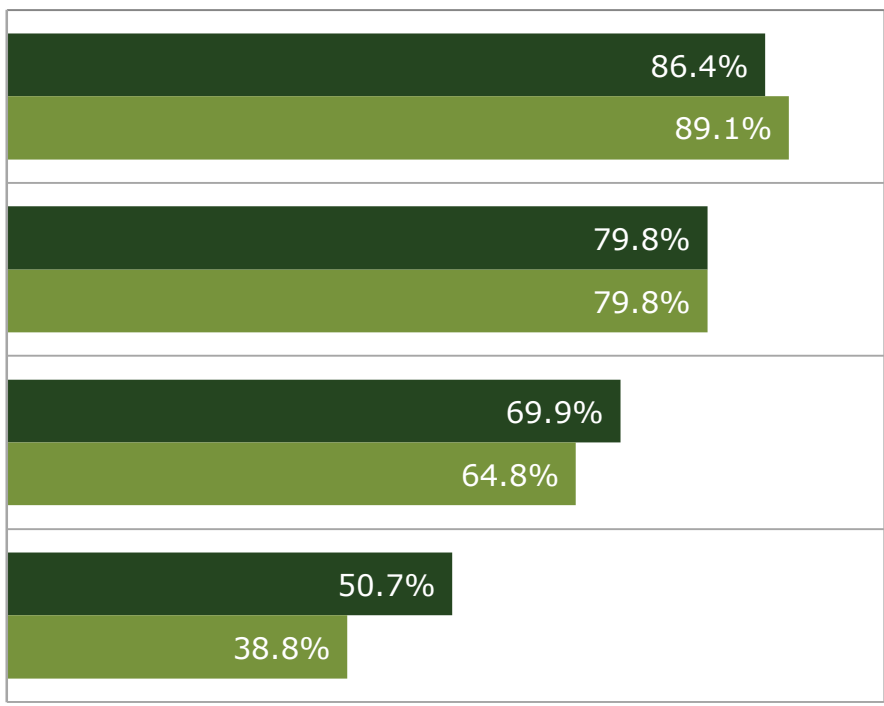
# Advisory and executive influence have grown during the last years



www.communicationmonitor.eu / Zerfass et al. 2011 / n = 1,449 PR professionals in communication departments; Q 7; Zerfass et al. 2010 / n<sup>max</sup> = 1,511; Q4 / Zerfass et al. 2009, n<sup>max</sup> = 1,267; Q 3 / Zerfass et al. 2008, n = 1,027; Q 1 / Advisory influence: consistent wording 2008-2011 / Executive influence: wording in the questionnaire has been changed since 2010 in line with the US GAP surveys (Swerling 2009).

# Influence of the communication function is correlated with the formal position and power of the top communication manager

The top communication manager...



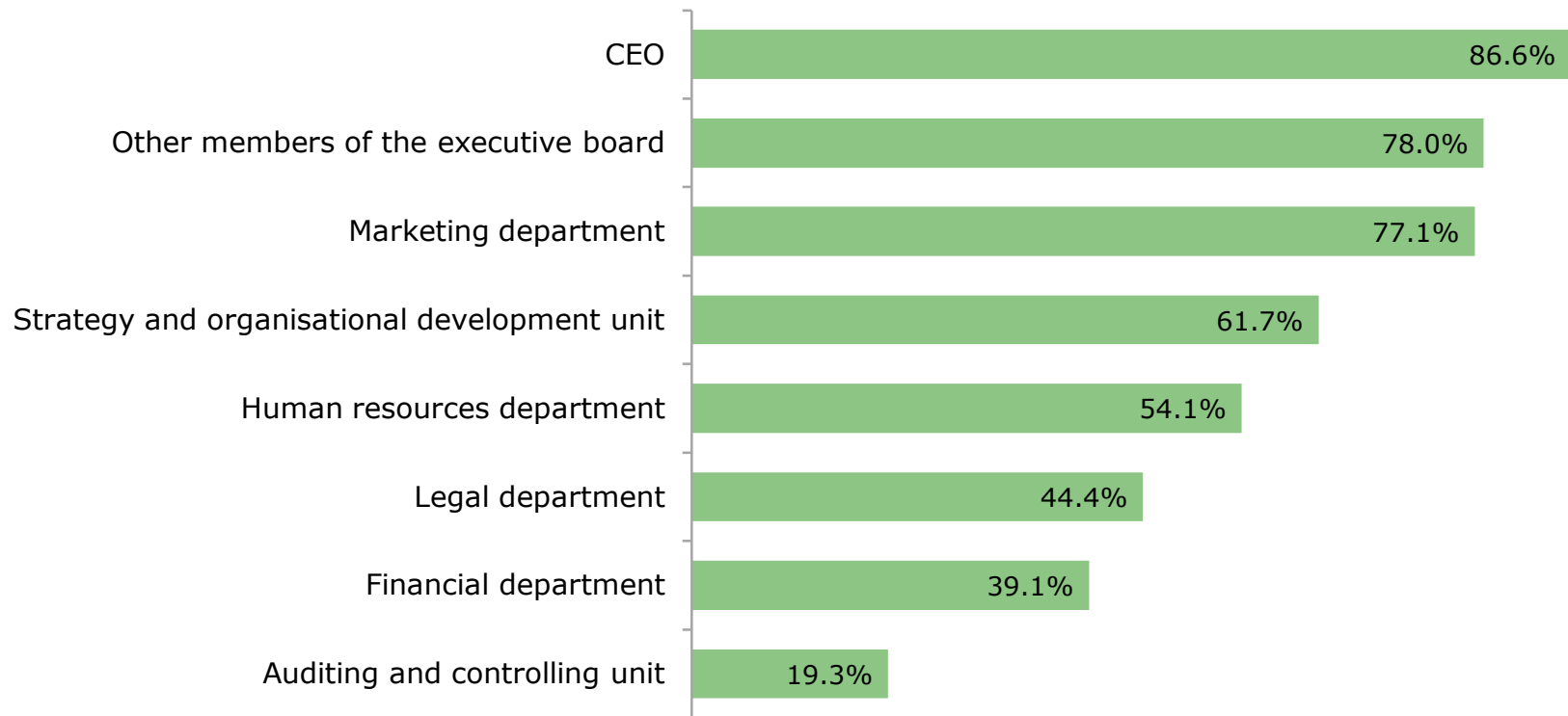
- sits on the board
- reports directly to the CEO
- reports to another board member or function
- does not report directly to the CEO or anyone who sits on the board

■ Advisory influence   ■ Executive influence

www.communicationmonitor.eu / Zerfass et al. 2011 / n = 1,449 PR professionals in communication departments; Q 7, Q 5. Significant, but weak correlation between the position of the top communication manager and advisory influence of the communication function. Stronger correlation between the position of the top communication manager and executive influence (Spearman's rho, p≤0.01).

# Collaboration of communication with other functions in the organisation

The communication functions works closely with the ...



## Collaboration with other functions in different types of organisations

	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations
CEO	87.6%	85.9%	81.2%	92.6%
Other members of the executive board	81.2%	77.6%	74.5%	74.4%
Human resources department	64.6%	57.7%	40.3%	38.1%
Financial department	49.8%	35.0%	26.8%	32.1%
Legal department	57.3%	40.5%	33.6%	28.8%
Marketing department	78.2%	85.6%	66.1%	76.3%
Auditing and controlling unit	20.0%	15.3%	22.1%	19.5%
Strategy and organisational development unit	59.6%	62.9%	59.7%	66.8%

## Interpretation

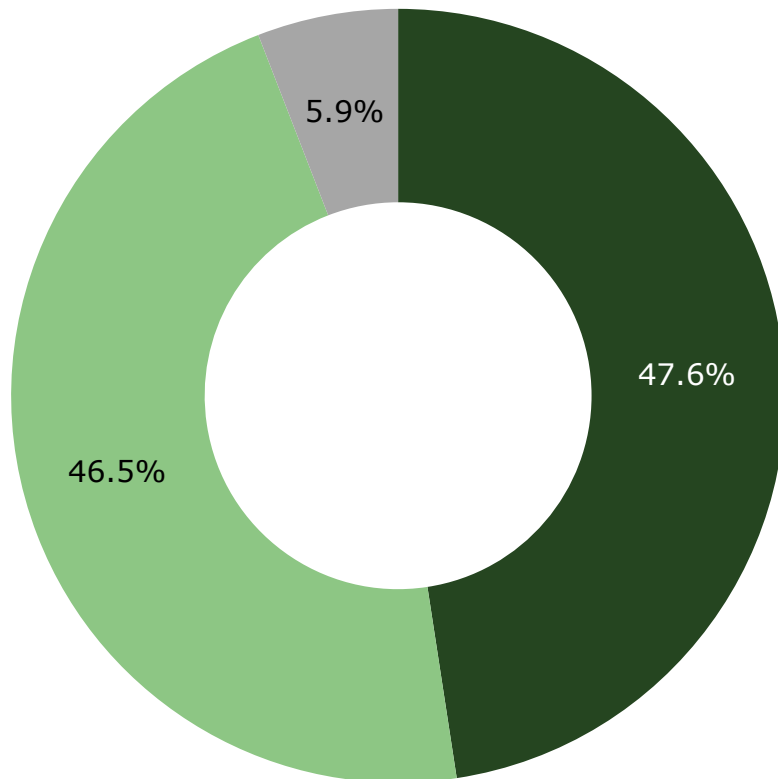
### **Communication departments are influential, but lack many aspects of power**

- The communication function has gained more influence in Europe during the last years; in three out of four organisations communication is taken seriously by senior management and communication is likely to be involved in planning organisational strategies
- Working relationships are especially close with the CEO (reported by 86.6 per cent of the respondents), followed by other members of the executive board and the marketing department (more than 75 per cent). Good links to the strategy people are hindered by rather weak connections to auditing and controlling units.
- 17.8 per cent of communication professionals are board members. However, this differs widely between various types of organisations, regions and countries in Europe. It is less prevalent in companies and in Western Europe.
- Six out of ten top communication managers report directly to the CEO, and 83.4 per cent are responsible for all kind of public / media, marketing, internal, financial and lobbying communications or at least three of these fields. When leaders hold more responsibility they prefer an inclusive leadership style. The transactional style is prevalent when practitioners do not report to the board and restrict their functions to media relations.
- However, these indicators of formal power are not always accompanied by horizontal power. It is clearly possible for the self reporting respondents to have power and no influence and vice versa. For example there are respondents who are responsible for a lot within the organisation but then 24.5 per cent of them don't see the communication department as playing an important role in the overall performance of the company, and possibly more concerning 30.2 per cent think it is replaceable.



ROI of communication

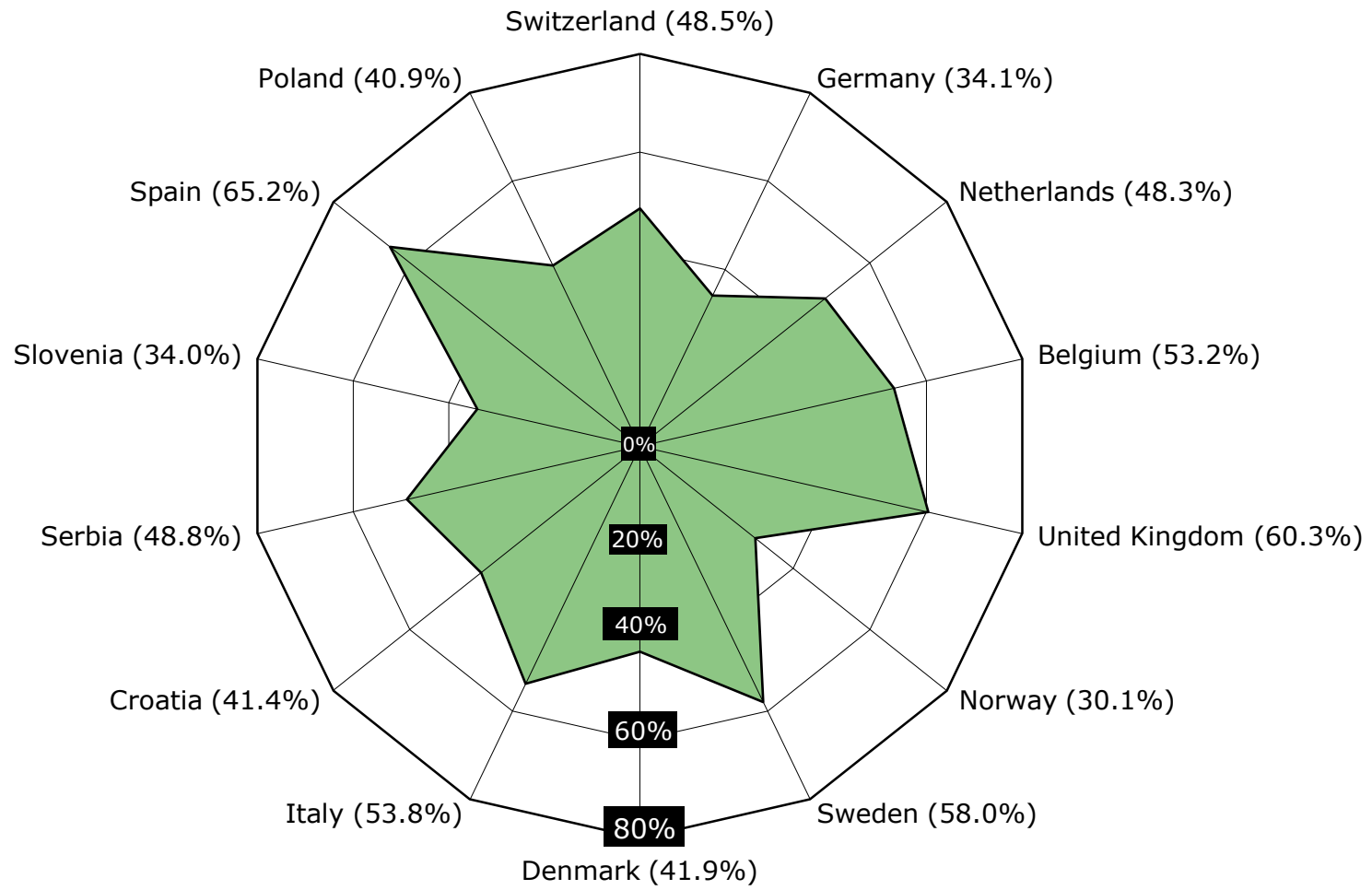
# Almost every second professional uses the term 'return on investment' when planning or evaluating communication



- use the term 'return on investment'
- do not use the term 'return on investment'
- do not know the term 'return on investment'

Position	Usage of the ROI concept
Head of communication, Agency CEO	53.7%
Unit leader	45.7%
Team member, consultant	34.5%

The term 'ROI' is rather common in Spain, the UK and Sweden; only three out of ten use it in Germany, Norway and Slovenia



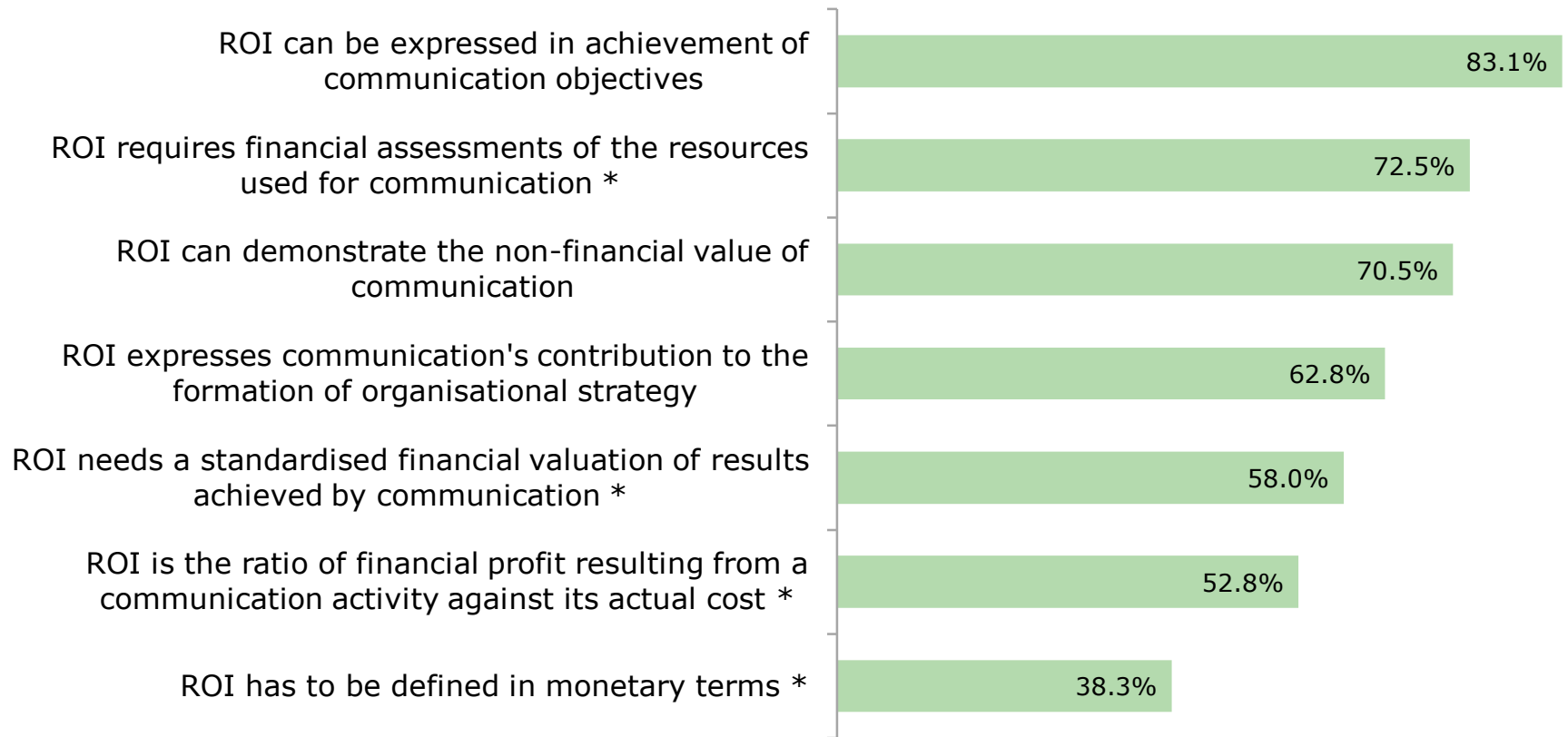
## Communication professionals in Southern Europe tend to use 'ROI', which is best known in Western Europe

	Northern Europe	Western Europe	Southern Europe	Eastern Europe
Use the term 'Return on Investment'	46.5%	45.7%	50.4%	46.8%
Do not use the term 'Return on Investment'	46.7%	50.5%	43.2%	45.5%
Do not know the term 'Return on Investment'	6.8%	3.7%	6.4%	7.8%

## The term 'ROI' is more common for practitioners working in companies and in agencies

	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations	Agencies/ Consultancies
Use the term 'return on investment'	51.1%	47.5%	28.2%	32.5%	59.3%
Do not use the term 'return on investment'	46.1%	48.0%	56.4%	56.3%	37.5%
Do not know the term 'return on investment'	2.8%	4.5%	15.4%	11.3%	3.1%

# Most communication professionals have an improper understanding of the ROI concept



www.communicationmonitor.eu / Zerfass et al. 2011 / n = 2,209 PR professionals; Q 16: Would you agree or disagree with the following statements? (1 = Agree, 2 = Disagree, 3 = I don't know). "ROI is the ratio of financial profit ..." is the standard economic definition for ROI; only statements marked with \* are consistent with the standard definition of ROI. Items partly based on research on ROI concepts in communication. i.e. Gregory & Watson 2008, Likely, Rockland & Weiner 2006.

## More frequent and more accurate use of the term 'ROI' in communication agencies and consultancies

	Communication departments	Agencies/ Consultancies
Usage of the term 'ROI' or 'return on investment'	42.8%	59.3%
ROI is the ratio of financial profit resulting from a communication activity against its actual cost	51.3%	56.3%

## Interpretation

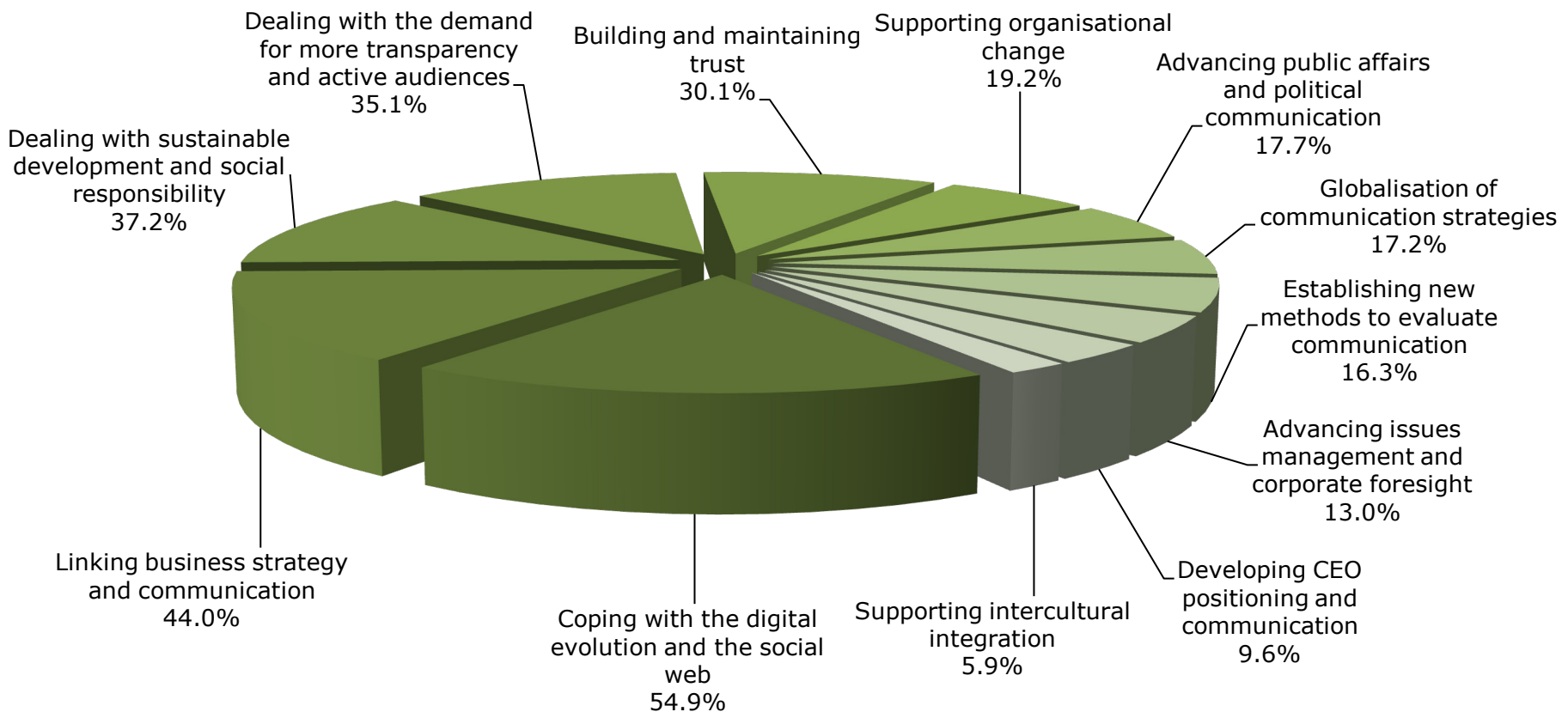
### **Misleading use of the ROI concept in planning and evaluating communications**

- Communication professionals are ambiguous about 'return on investment', a concept propagated by a number of evaluation companies for proving the economic value of communication activities.
- Almost every second practitioner claims to use the term, which is especially popular among heads of communication and agencies, in consultancies and companies. It is common for six out of ten professionals in Spain, the UK and Sweden.
- A minority of professionals working in governmental organisations and in countries like Norway, Slovenia and Germany use ROI when planning and evaluating communications.
- While ROI is clearly defined in economics as the ratio of financial profit resulting from an activity against its actual cost, most communication professionals think it can be expressed in achievement of communication objectives or be used to demonstrate the non-financial value of communication. Only 52.8 per cent agree with the standard definition, and even less know that ROI has to be defined in monetary terms.
- The research shows that basic knowledge about management theories and accounting is missing in the profession. Using the ROI concept in an improper way is pointless and may even damage the reputation of the profession.



Strategic issues and trust

# Strategic issues for communication management until 2014

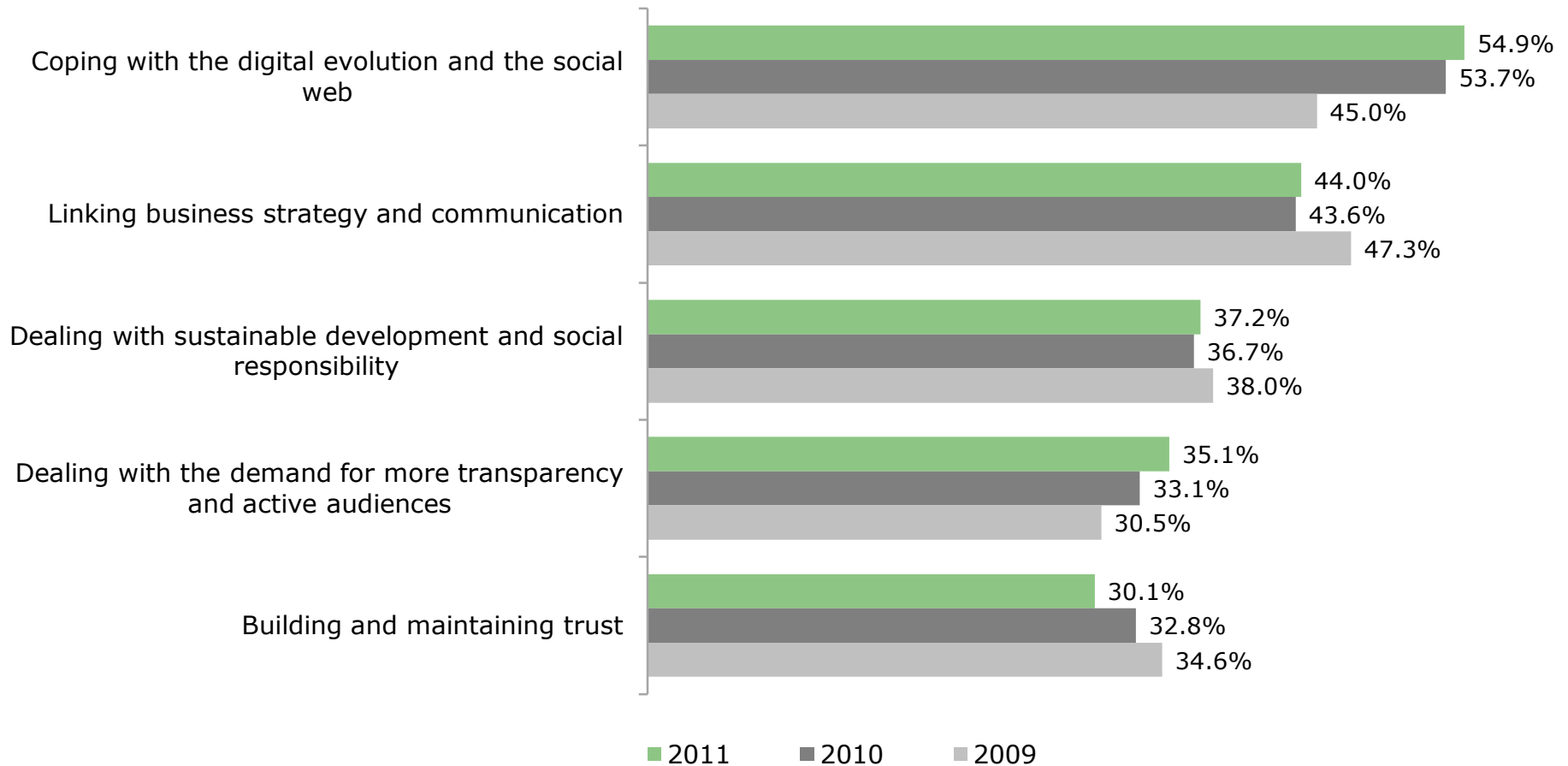


www.communicationmonitor.eu / Zerfass et al. 2011 / n = 2,209 PR professionals; Q 12: Here are some issues that might become relevant for public relations and communication management within the next three years. Please pick those three which are most important from your point of view.

## Most important issues at a glance

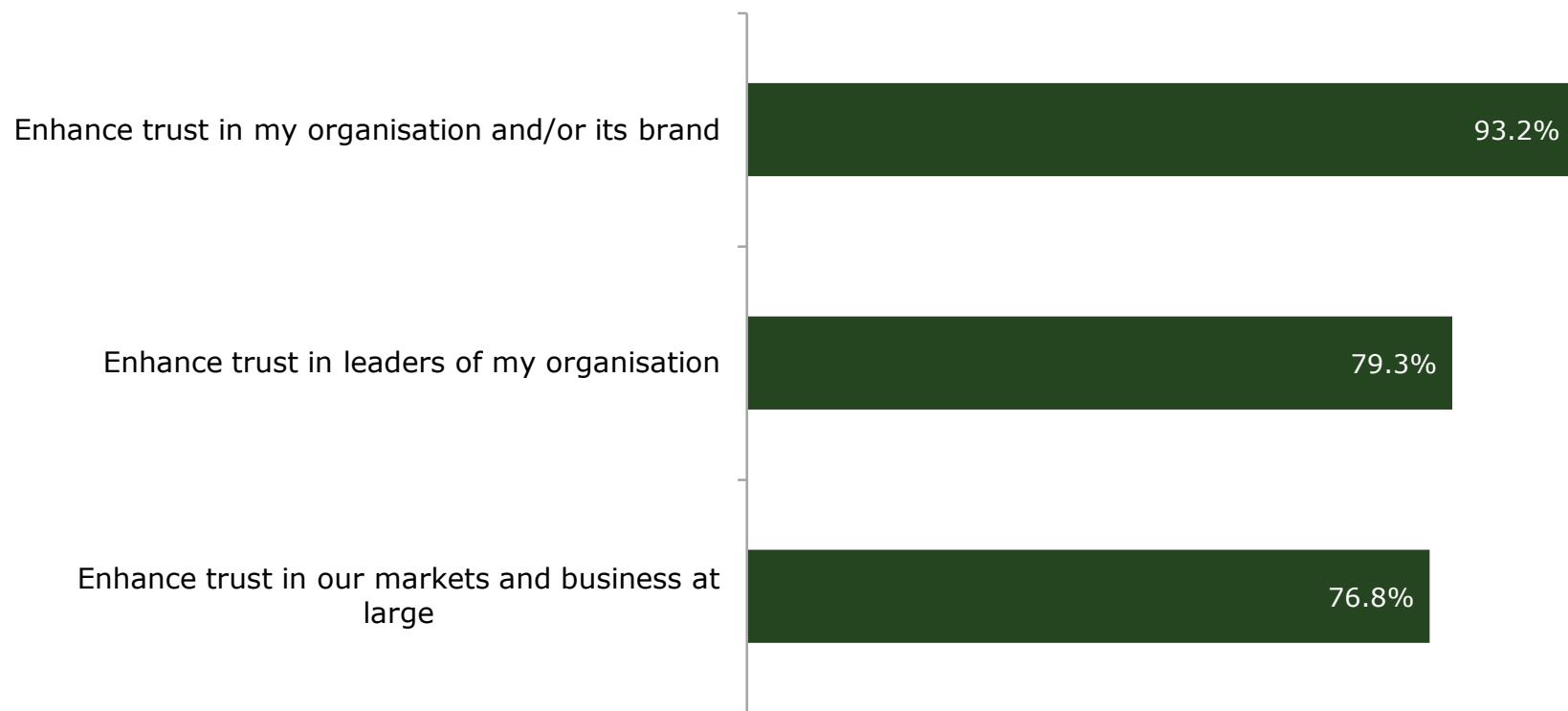
Most important issues for communication management until 2014		
1	Coping with the digital evolution and the social web	54.9%
2	Linking business strategy and communication	44.0%
3	Dealing with sustainable development and social responsibility	37.2%
4	Dealing with the demand of new transparency and active audiences	35.1%
5	Building and maintaining trust	30.1%

## Relevance of strategic issues compared to previous surveys



# Trust: Practitioners primarily strive to enhance stakeholders' trust in organisations and brands; other objectives are less relevant

Goals relevant in the daily work of communication professionals



www.communicationmonitor.eu / Zerfass et al. 2011 / n = 1,450 PR professionals in communication departments. Q 9: Communication management may strive to gain stakeholders' trust in people, organisations, and societal systems as a whole. How relevant are each of the following goals in your daily work? Scale 1 (= not relevant) – 5 (= very relevant), considered scale points: 4-5. Items derived from research on trust levels (Luhmann 1979, Giddens 1990, Nielsen 2006, Arthur W. Page Society & Business Roundtable 2009, Harris & Wicks 2010)

## Gaining stakeholders' trust as a goal of communication management in various types of organisations

	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations
Enhance trust in leaders of my organisation	84.3%	74.2%	75.8%	77.7%
Enhance trust in my organisation and/or its brand	94.9%	92.3%	88.9%	95.3%
Enhance trust in our markets or business at large	82.0%	78.8%	62.8%	78.1%

www.communicationmonitor.eu / Zerfass et al. 2011 / n = 1,450 PR professionals in communication departments; Q 9: Communication management may strive to gain stakeholders' trust in people, organisations, and societal systems as a whole. How relevant are each of the following goals in your daily work? Scale 1 (= not relevant) – 5 (= very relevant), considered scale points: 4-5 / Q 20. No significant differences between the different types of organisations (chi-square test,  $p \leq 0.05$ ).

## Gaining stakeholders' trust in different European regions

	Northern Europe	Western Europe	Southern Europe	Eastern Europe
Enhance trust in leaders of my organisation	84.2%	77.4%	74.9%	82.4%
Enhance trust in my organisation and/or its brand	97.2%	95.4%	86.3%	92.6%
Enhance trust in our markets or business at large	81.0%	77.6%	72.4%	72.8%

www.communicationmonitor.eu / Zerfass et al. 2011 / n = 1,450 PR professionals in communication departments; Q 9: Communication management may strive to gain stakeholders' trust in people, organisations, and societal systems as a whole. How relevant are each of the following goals in your daily work? Scale 1 (= not relevant) – 5 (= very relevant), considered scale points: 4-5 / Q 20. No significant differences between the four regions (chi-square test, p ≤ 0.05).

## Interpretation

### **Digital development and building trust in organisations are key challenges**

- Coping with the digital evolution and the social web continues to be the most important issue for communication management in the next few years. 54.9 per cent of the respondents identified this challenge. The issue is valued more importantly in each annual survey, as is the related demand for more transparency and dealing with active audiences. Other issues are judged in the same way as before such as the second-ranking topic 'linking business strategy and communication' while some have even lost importance, like enhancing trust.
- Three out of ten professionals state that building and maintaining trust is a major challenge for communication management within the next three years. When striving to gain stakeholders' trust, almost every respondent (93.2 per cent) claims he or she wants to enhance trust in the organisation and/or its brands.
- Alternative objects of trust like leaders of the organisation (people) and markets or businesses at large (societal systems) are less relevant; they are named by less than 80 per cent of the respondents. However, enhancing trust in named people is more relevant in joint stock companies and in Northern Europe.



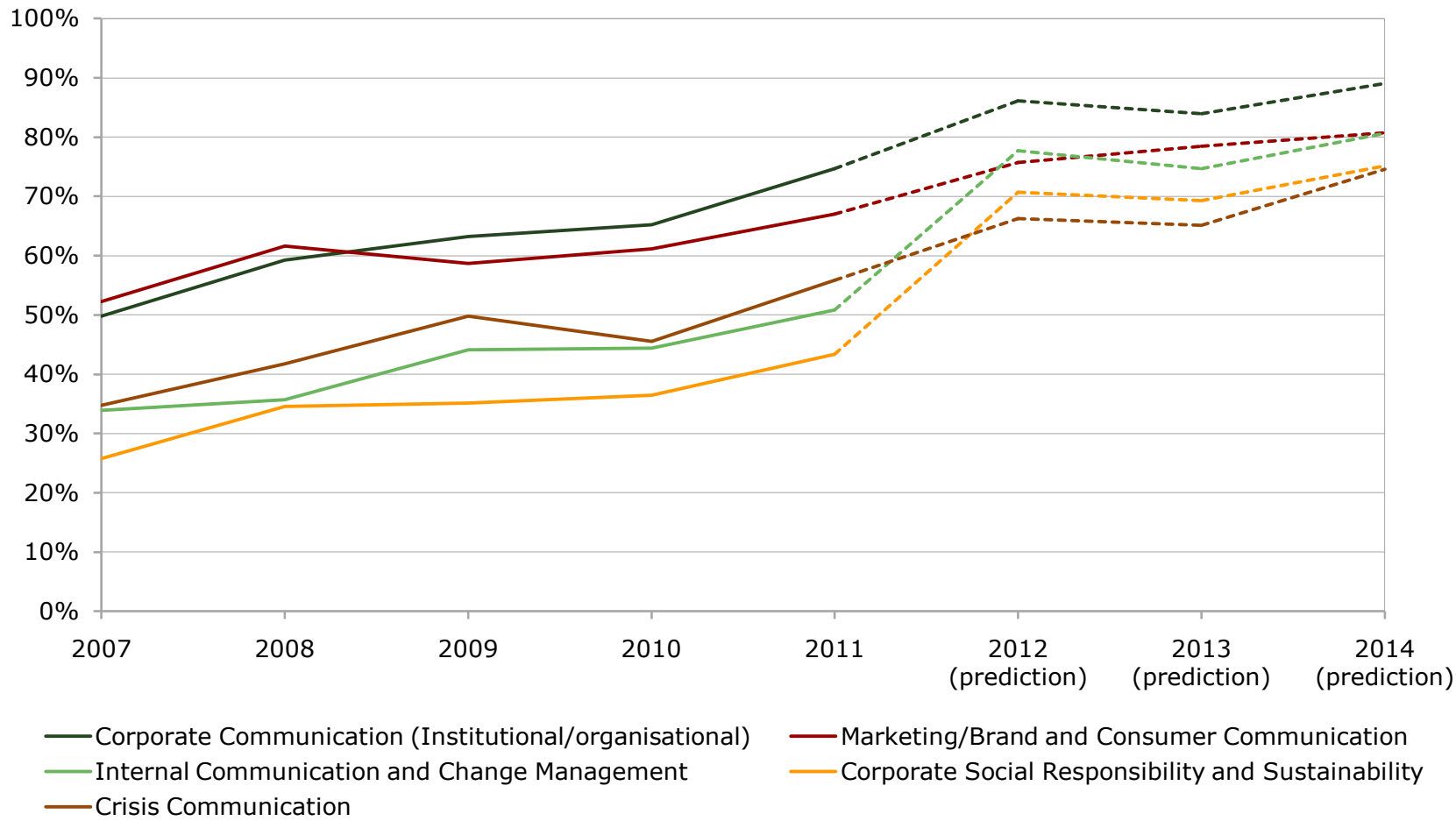
Development of disciplines and communication channels

## Most important disciplines in communication management

Today		In 2014		
1	Corporate Communication (Institutional/organisational)	1	Corporate Communication (Institutional/organisational)	→
2	Marketing/Brand and Consumer Communication	2	Internal Communication and Change Management	↑
3	Crisis Communication		Marketing/Brand and Consumer Communication	↘
4	Internal Communication and Change Management	4	CSR and Sustainability	↑
5	Issues Management	5	Crisis Communication	↓

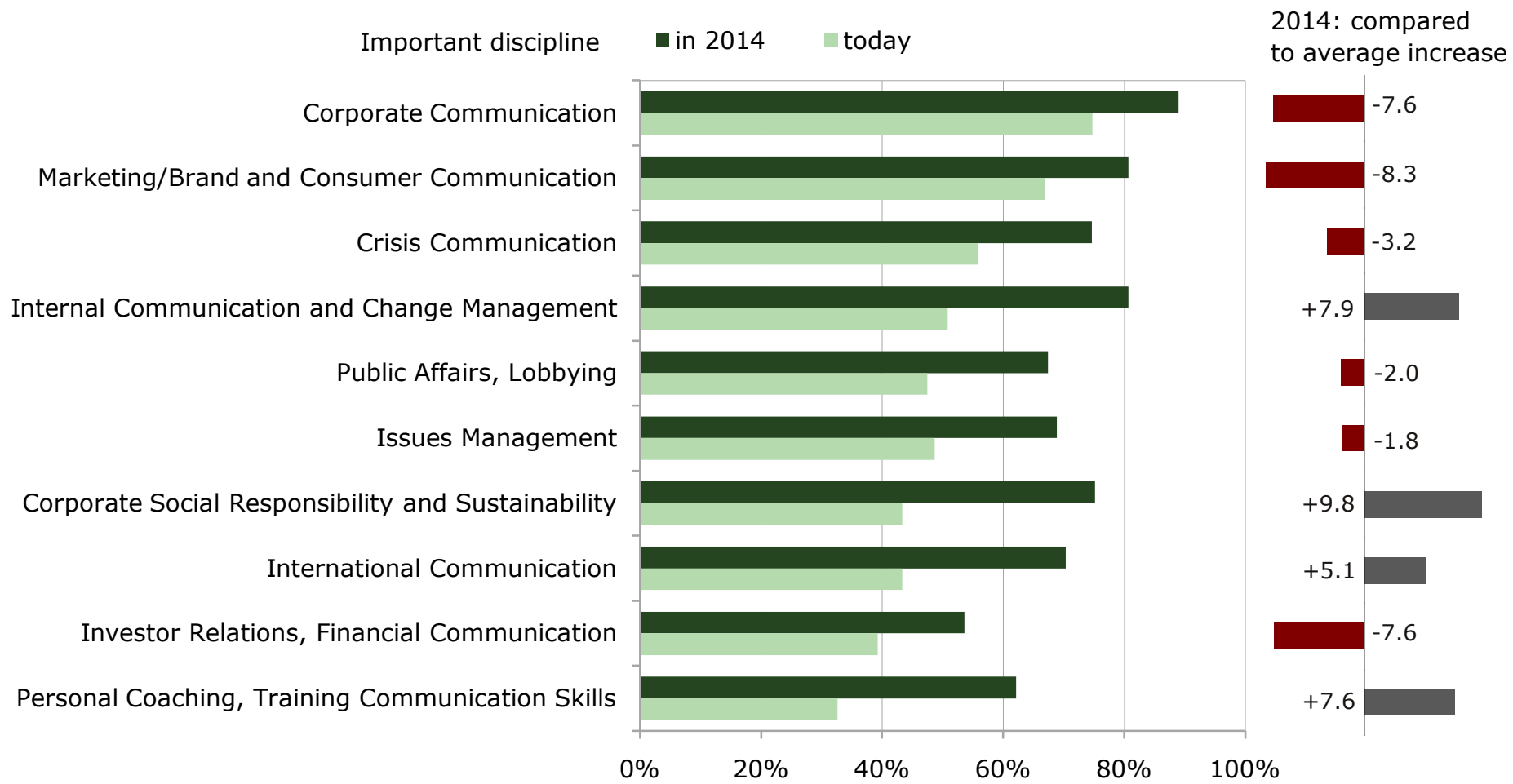
# Corporate communication and internal communication are steadily growing, while marketing has lost ground

Importance of fields of practice in communication management



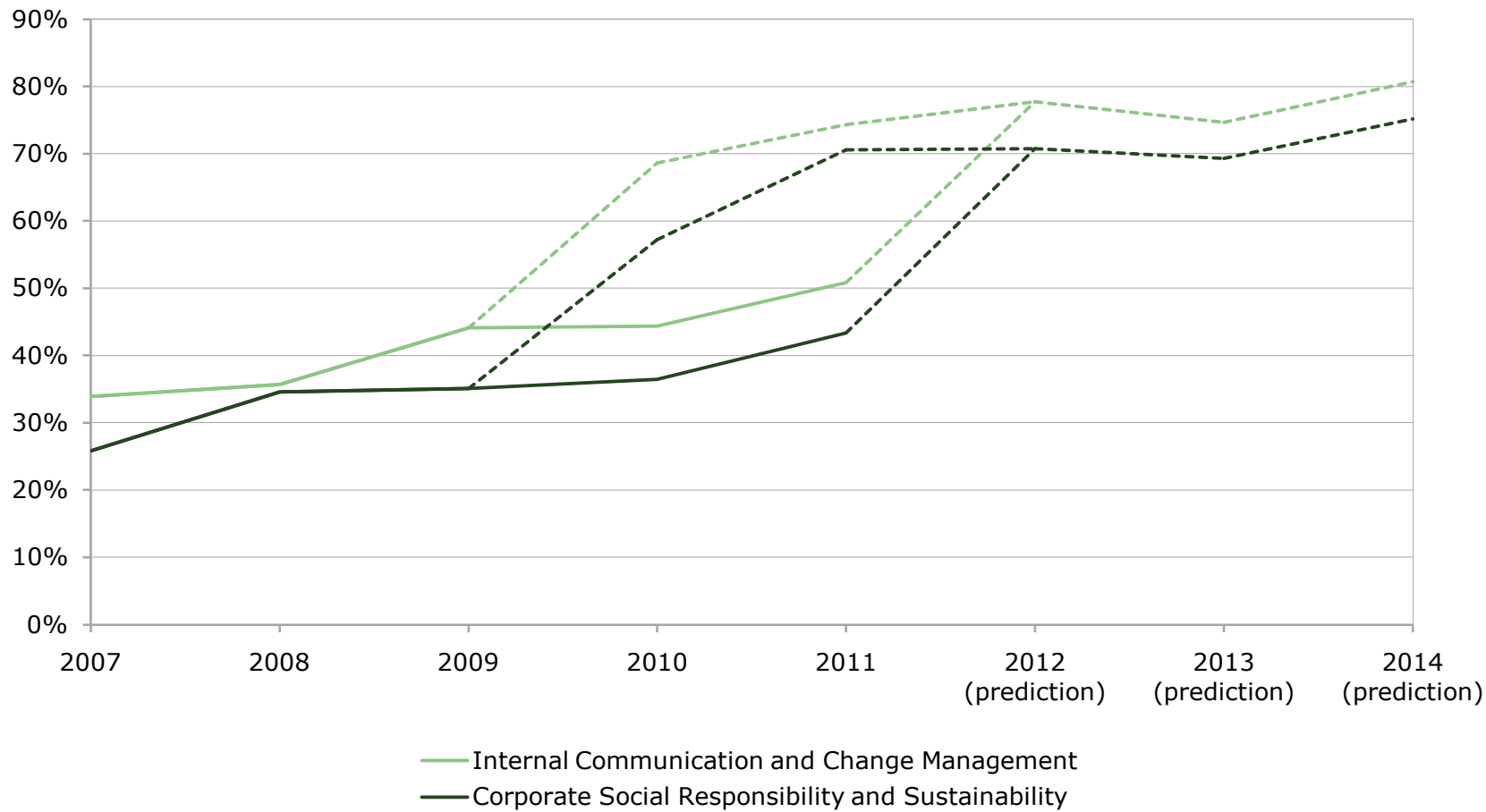
www.communicationmonitor.eu / Zerfass et al. 2011 / n<sup>max</sup> = 2,163 PR professionals; Q 10; Zerfass et al. 2010 / n<sup>max</sup> = 1,926; Q 5; Zerfass et al. 2009 / n<sup>max</sup> = 1,863; Q 4; Zerfass et al. 2008 / n = 1,524; Q 2; Zerfass et al. 2007 / n = 1,087; Q 3.

# CSR, internal communication, international communication and personal coaching are expected to gain in importance



# Comparison with previous surveys shows that professionals overestimate the growth of disciplines

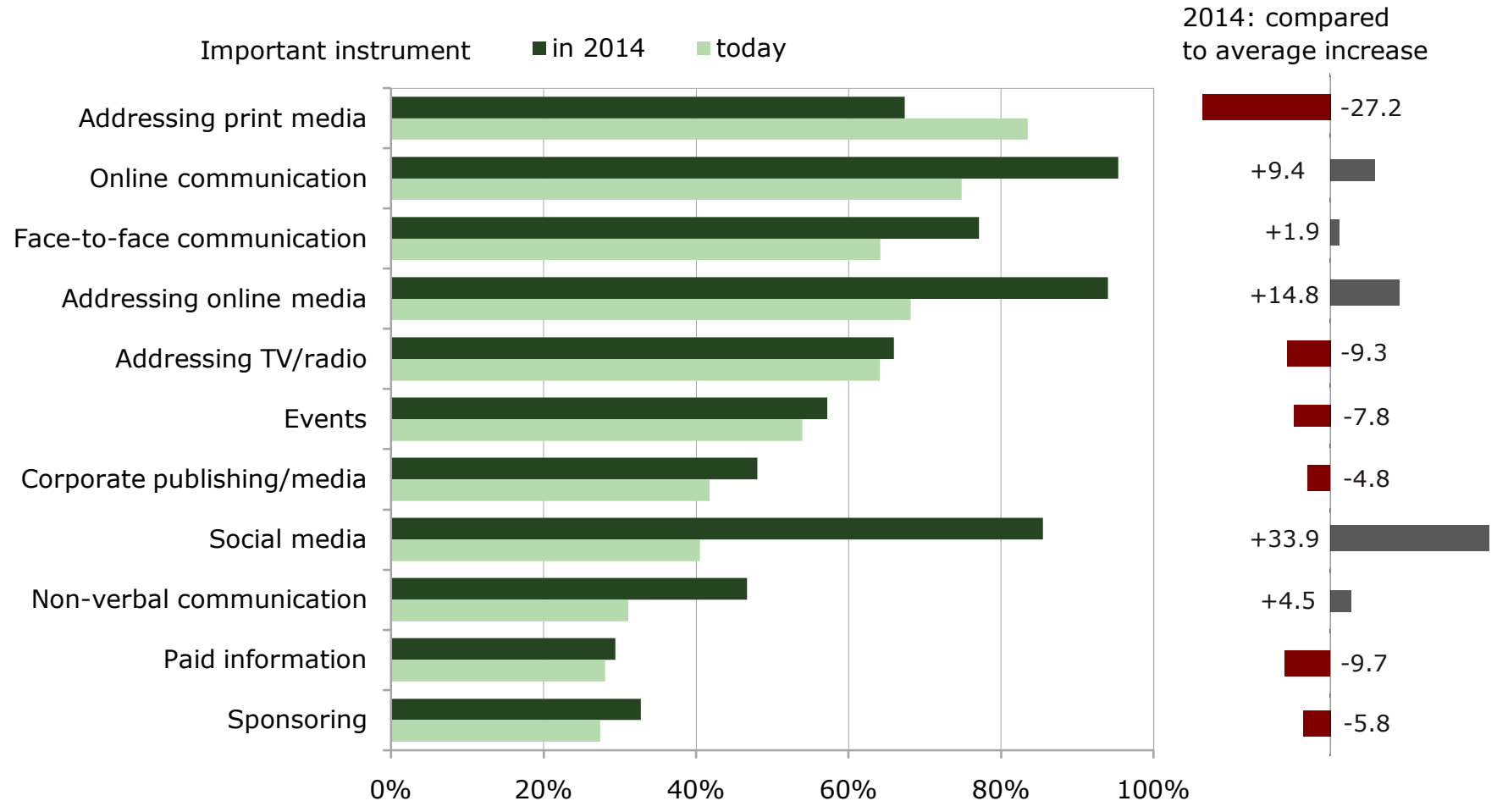
Importance of fields of practice in longitudinal analysis



## Channels and instruments: Various types of online communication and face-to-face are expected to lead in three years

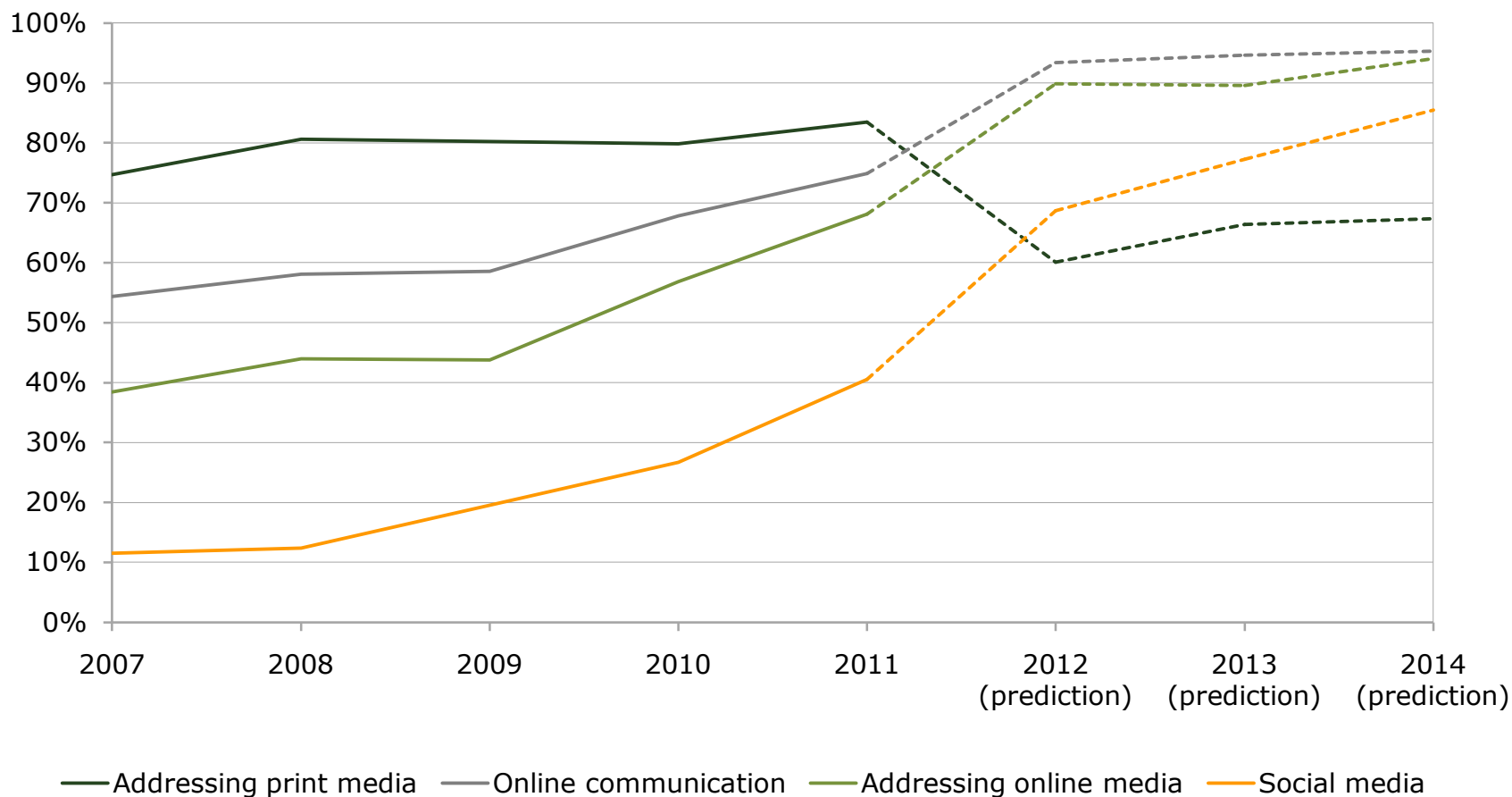
Today		In 2014		
1	Press and media relations: Print media	1	Online communication	↗
2	Online communication	2	Press and media relations: Online media	↗
3	Press and media relations: Online media	3	Social media	↑
4	Face-to-face communication	4	Face-to-face communication	→
5	Press and media relations: TV/radio	5	Press and media relations: Print media	↓

# Expected development of communication channels



www.communicationmonitor.eu / Zerfass et al. 2011 / n<sup>max</sup> = 2,146 PR professionals; Q 11: How important are the following methods in addressing stakeholders, gatekeepers and audiences? Will this change within the next three years? (1 = not important; 5 = very important; important instrument = scale points 4-5.) Comparison shows difference to the average increase (11.1%).

# Online channels and instruments are continuously growing, while the importance of print media relations is declining



## Longitudinal analysis shows that professionals tend to overestimate the changing relevance of channels

	Predicted importance 2008-2011	Real importance 2008-2011	Variation
Press and media relations: Print media	-7.7%	+2.9%	+10.6%
Online communication	+33.6%	+16.7%	-16.9%
Face-to-face communication	+18.6%	+10.2%	-8.4%
Social media	+42.8%	+24.2%	-18.6%
Press and media relations: Online media	+8.0%	+14.4%	+6.4%
Press and media relations: TV/radio	+6.8%	+6.5%	-0.3%
Events	+15.1%	+4.8%	-10.3%
Corporate publishing/media	+43.0%	+28.1%	-14.9%

## Valuation of communication instruments in different organisations

Important instruments today:	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations
Press and media relations				
- addressing print media	87.2%	78.0%	88.7%	80.6%
- addressing online media	66.1%	65.4%	68.4%	69.5%
- addressing TV/radio	60.5%	50.3%	77.7%	62.3%
Corporate publishing/media	49.9%	41.3%	46.8%	38.9%
Online communication	76.1%	73.4%	77.3%	82.5%
Social media	34.7%	34.5%	32.9%	41.1%
Events	55.7%	55.5%	48.6%	49.0%
Sponsoring	35.3%	27.0%	17.3%	20.7%
Face-to-face communication	69.3%	66.3%	56.7%	65.8%
Non-verbal communication	35.6%	35.7%	24.6%	25.0%
Paid information	31.6%	29.4%	21.5%	18.3%
n =	595	381	294	226

## Interpretation

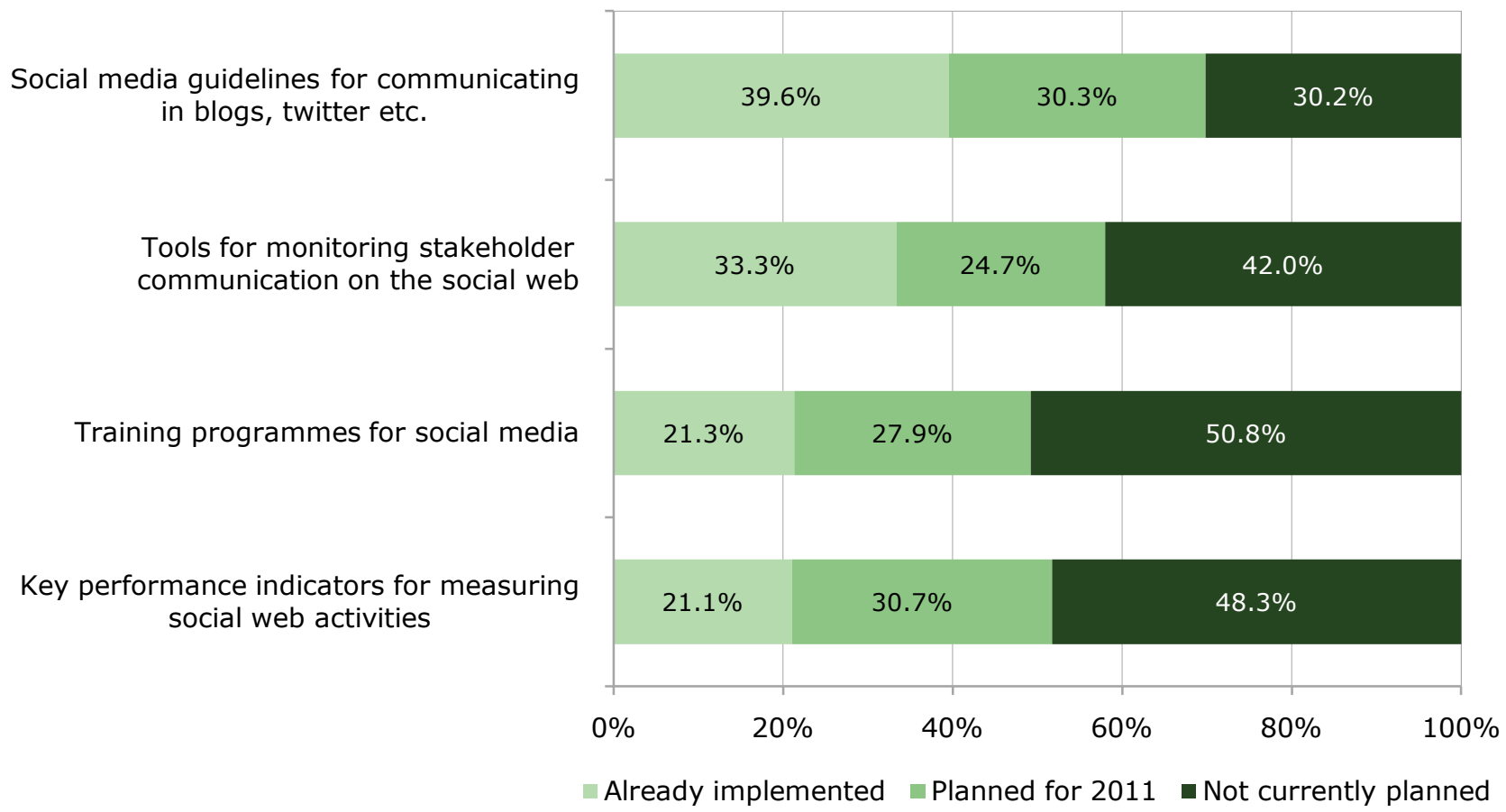
### **Internal communication and online channels keep growing**

- In accordance with previous surveys, the respondents predict a changing relevance of the various disciplines within the broad range of strategic communication. Corporate communication (communication focused on the whole institution or organisation) will keep its leading role. Next to this, marketing and consumer communications are thought to be exactly as important as internal and change communication in three years' time. Moreover, CSR and sustainability communications will continue their upswing.
- Two disciplines to watch are international communication and personal coaching. Communication professionals predict a growth in importance above average; a stable trend since the 2009 edition of this survey.
- Several types of online instruments are expected to lead the media mix utilised by communication management in the near future. Online communication (websites, e-mail, intranet) is ranked number one, followed by media relations addressing online journalists and social media channels. Face-to-face communication keeps its position, while press relations targeting print journalists is thought to be less relevant in 2014.
- However, a longitudinal analysis reveals that communication professionals tend to overestimate the growth of disciplines and communication channels. While media relations oriented towards online publications has gained stronger than expected, predictions given in 2008 for the importance of social media and online communications in 2011 (Zerfass et al. 2008) were nearly twice the numbers really identified this year.



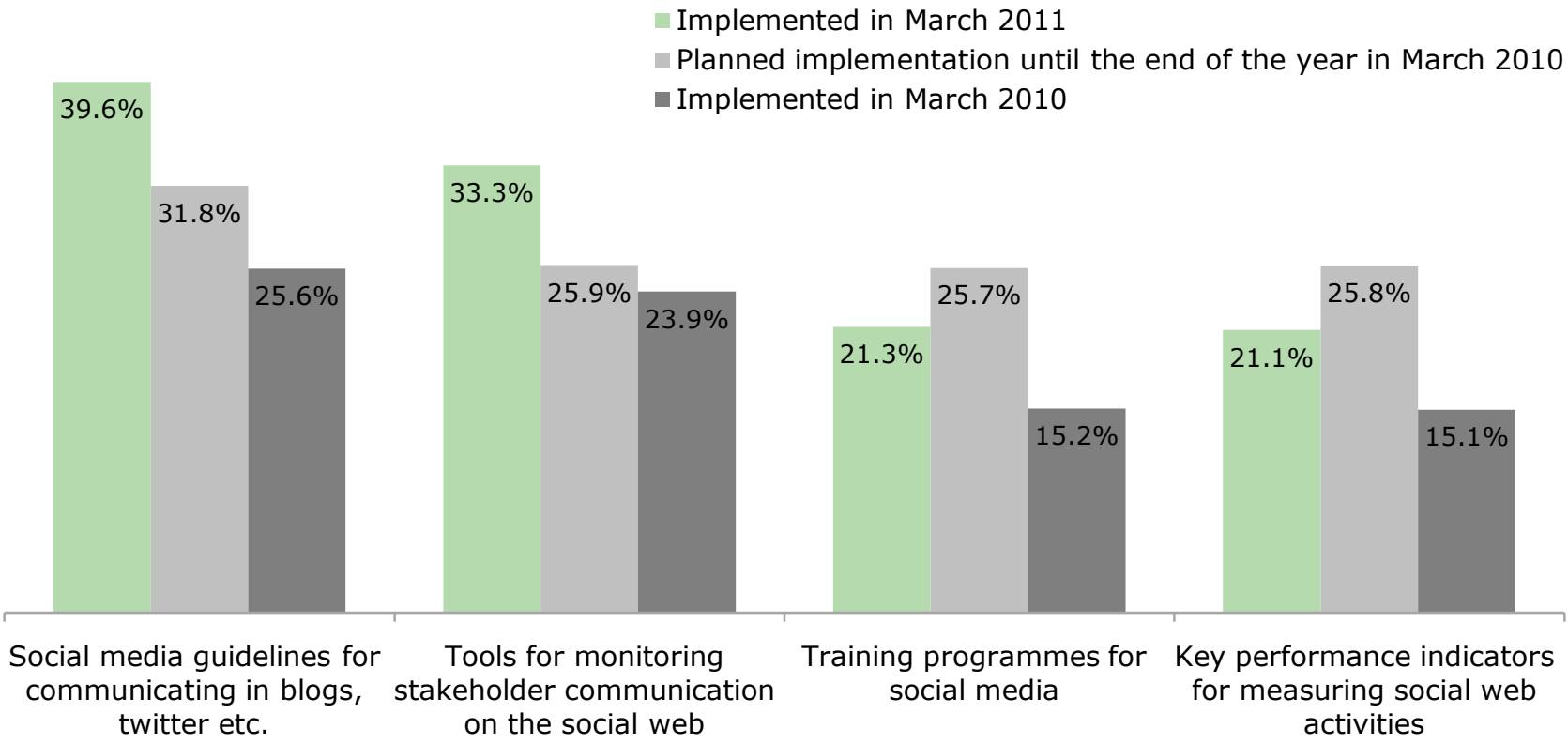
Social media: Governance, skills and activities

# Governance structures for social media are still missing in most communication departments



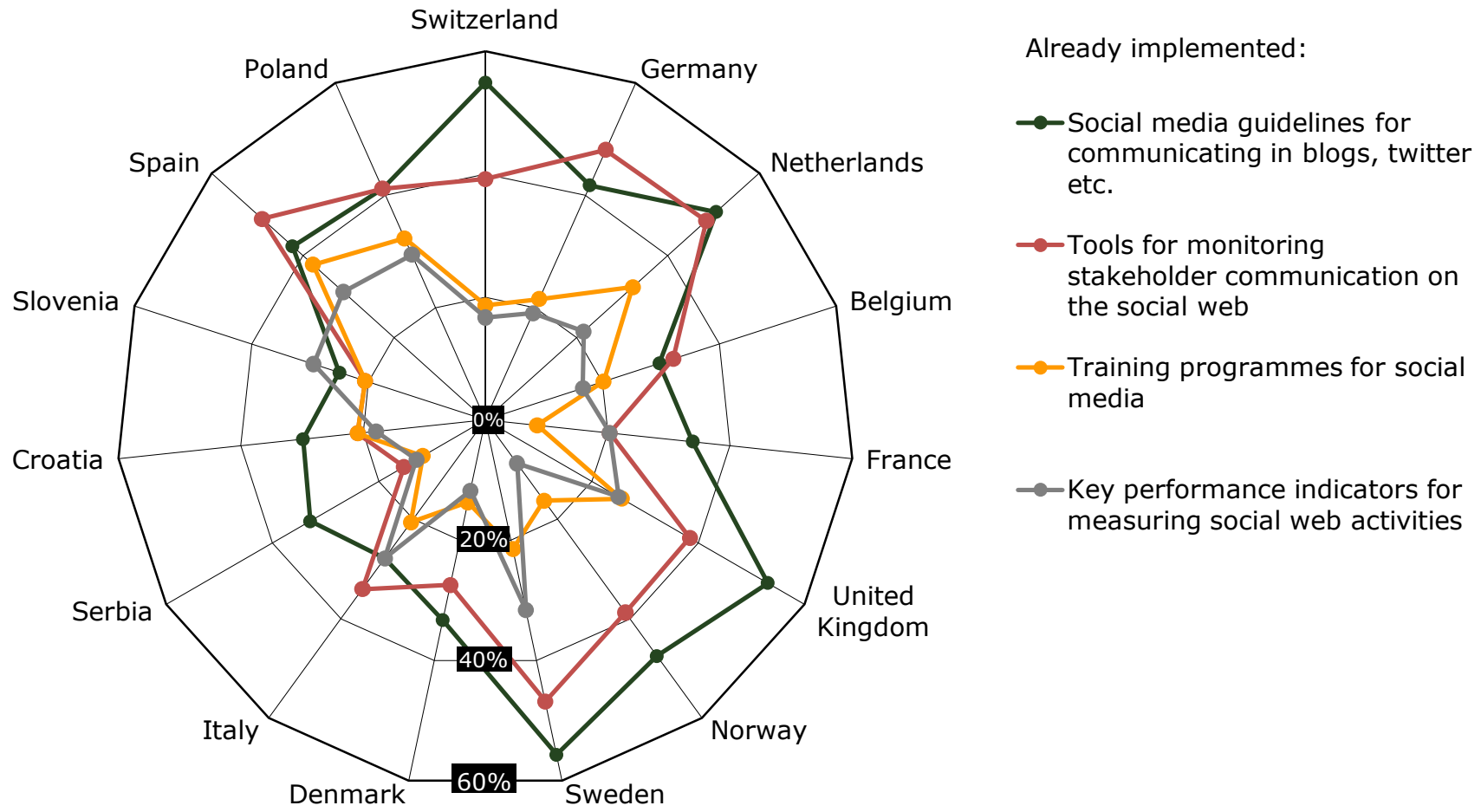
www.communicationmonitor.eu / Zerfass et al. 2011 / n = 1,572 PR professionals in communication departments; Q 15: Do any of the following measures exist in your organisation? (1 = Already implemented; 2 = Planned for 2011; 3 = Not currently planned).

# Social media guidelines and monitoring tools have evolved more strongly than expected



www.communicationmonitor.eu / Zerfass et al. 2011 / n = 1,572 PR professionals in communication departments; Q 15: Do any of the following measures exist in your organisation? (Already implemented; Planned for 2011; Not currently planned); Zerfass et al. 2010 / n = 1,531; Q 14: Has your organisation already implemented one of the following? (Already implemented; Planned for 2010; Not planned yet).

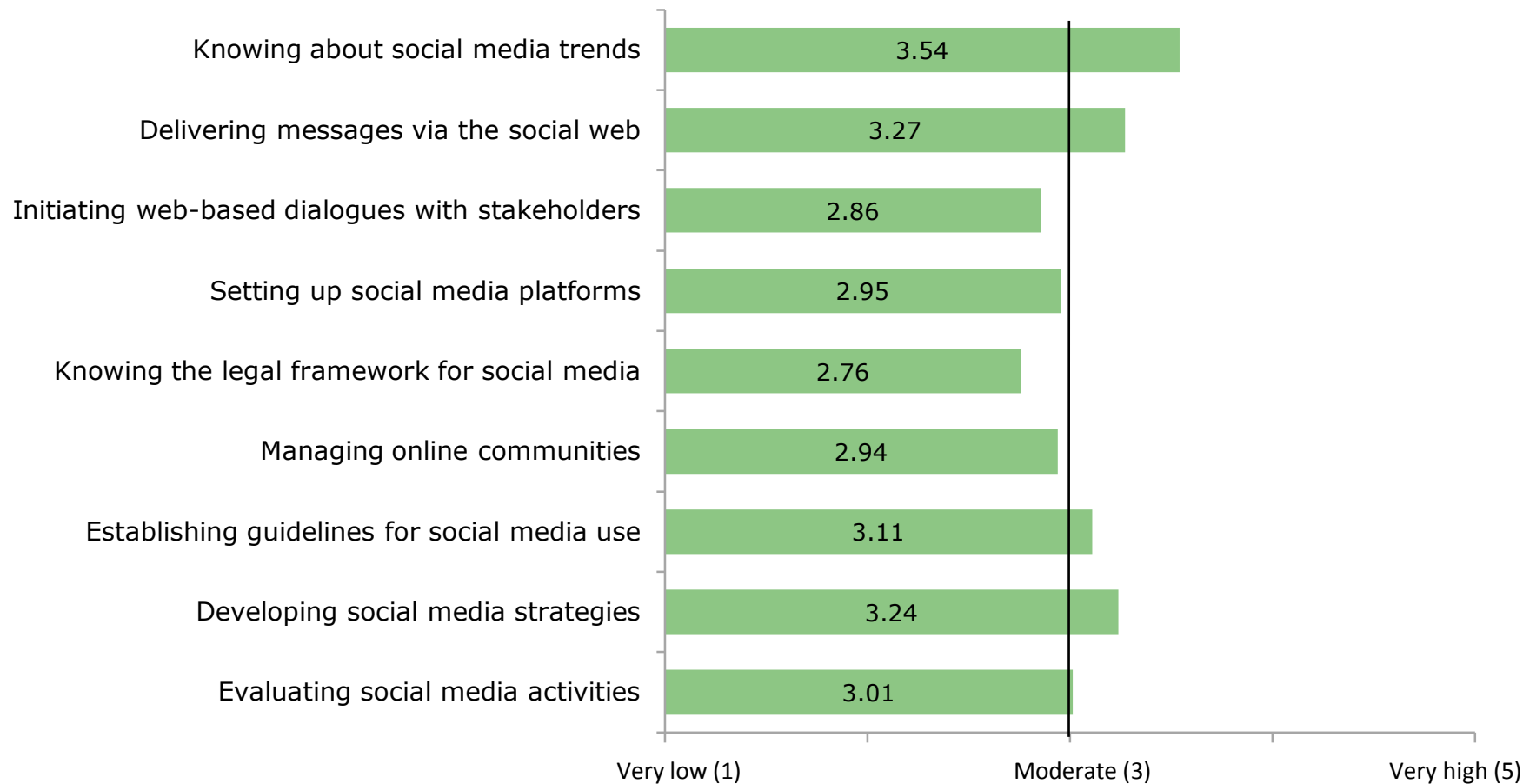
# Sweden and the UK are at the cutting edge when it comes to implementing social media guidelines



## Governmental organisations are lagging behind in terms of social media governance

Already implemented:	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations
Social media guidelines for communicating in blogs, twitter etc.	50.5%	36.8%	28.8%	30.0%
Tools for monitoring stakeholder communication on the social web	42.7%	30.8%	23.7%	25.8%
Training programmes for social media	23.3%	20.9%	18.3%	20.8%
Key performance indicators for measuring social web activities	25.1%	20.4%	13.1%	22.1%

# Social media skills and knowledge: Communication managers report rather moderate capabilities

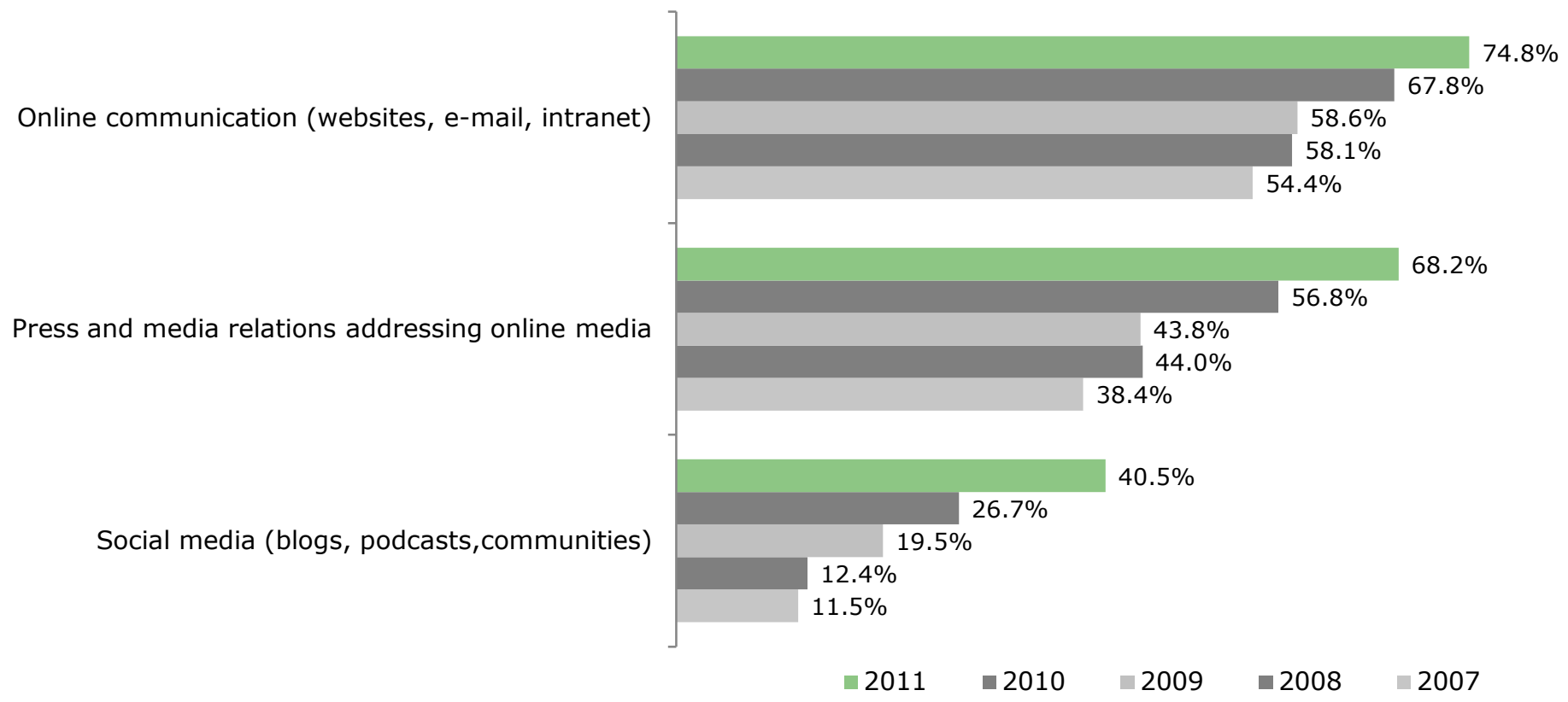


## Private use of social media increases capabilities; but correlations with business-specific skills are weak

	Private use of social media platforms
Delivering messages via the social web	-.408
Knowing about social media trends	-.347
Setting up social media platforms	-.322
Managing online communities	-.300
Developing social media strategies	-.275
Initiating web-based dialogues with stakeholders	-.272
Establishing guidelines for social media use	-.245
Evaluating social media activities	-.223
Knowing the legal framework for social media	-.209

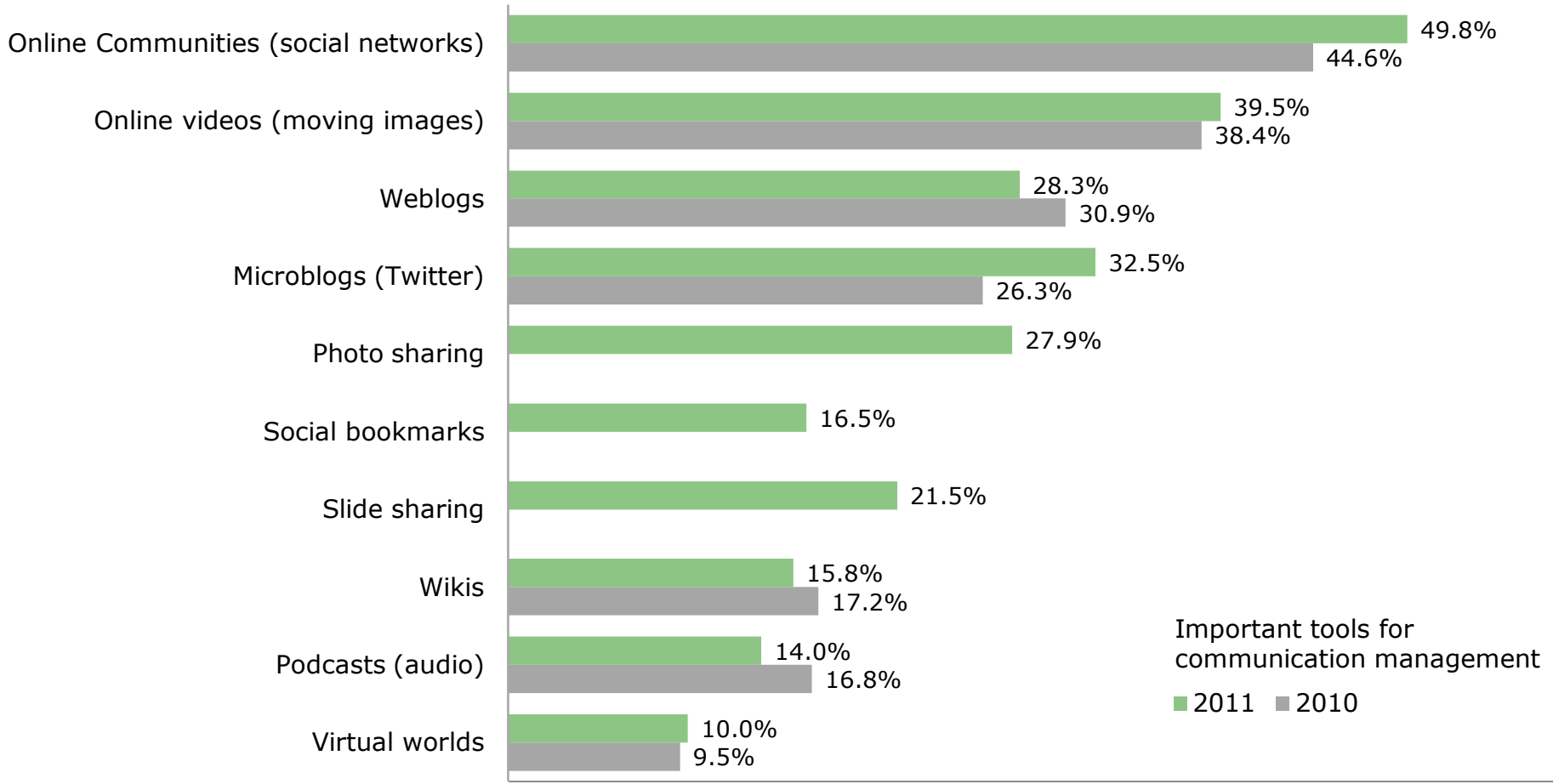
# Online communication and social media activities: Importance has grown steadily during the last five years

Important instruments for addressing stakeholders



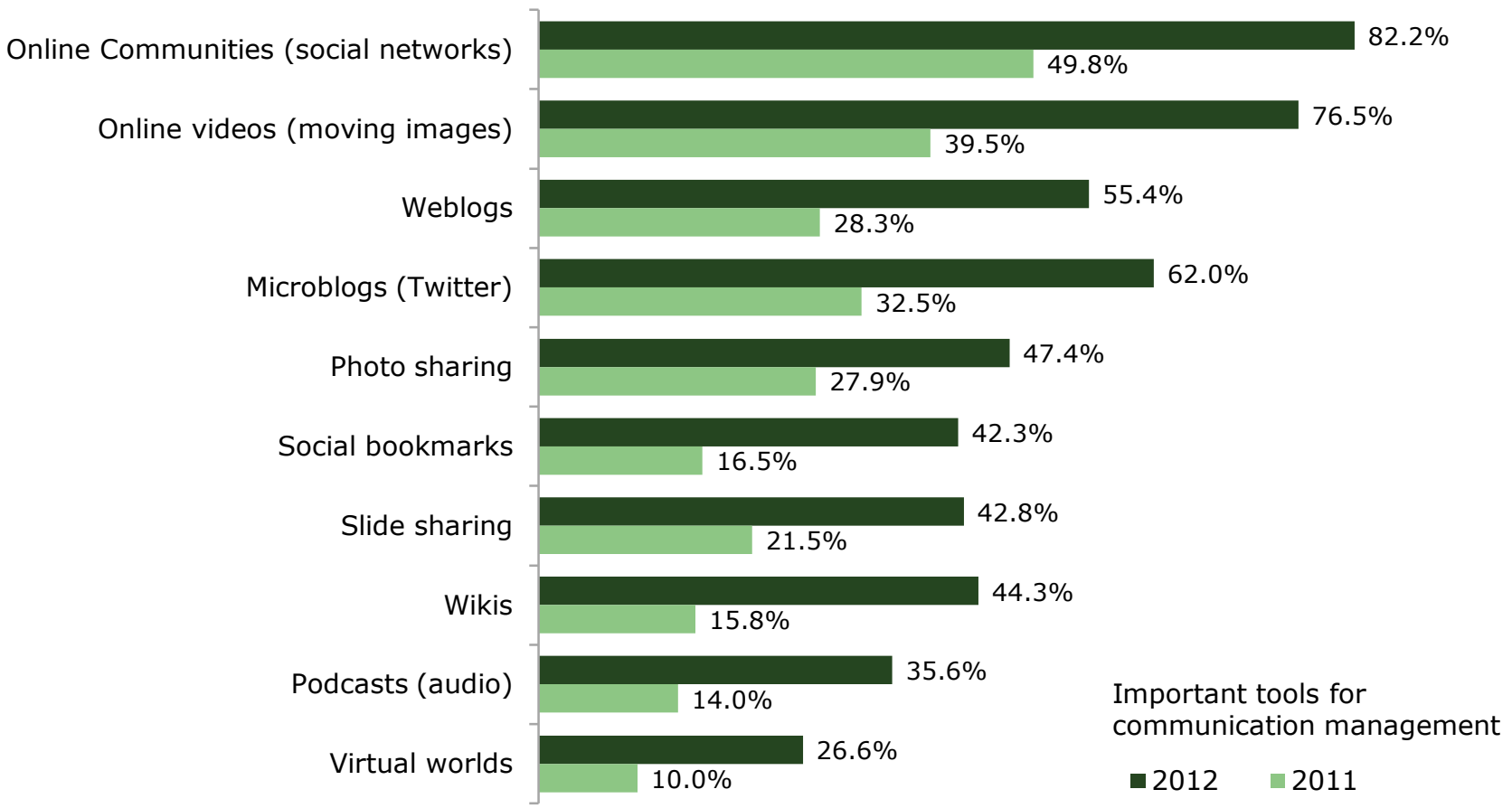
www.communicationmonitor.eu / Zerfass et al. 2011 / n<sup>max</sup> = 2,146 PR professionals; Q 11; Zerfass et al. 2010 / n<sup>max</sup> = 1,914; Q 6; Zerfass et al. 2009 / n<sup>max</sup> = 1,863; Q 5; Zerfass et al. 2008 / n = 1,524; Q 3; Zerfass et al. 2007/n = 1,087; Q 4: How important are the following methods in addressing stakeholders, gatekeepers and audiences? (1 = Not important; 5 = Very important; important = scale points 4-5).

# Social media channels: Online communities are leading the field; podcasts, wikis and weblogs have lost relevance



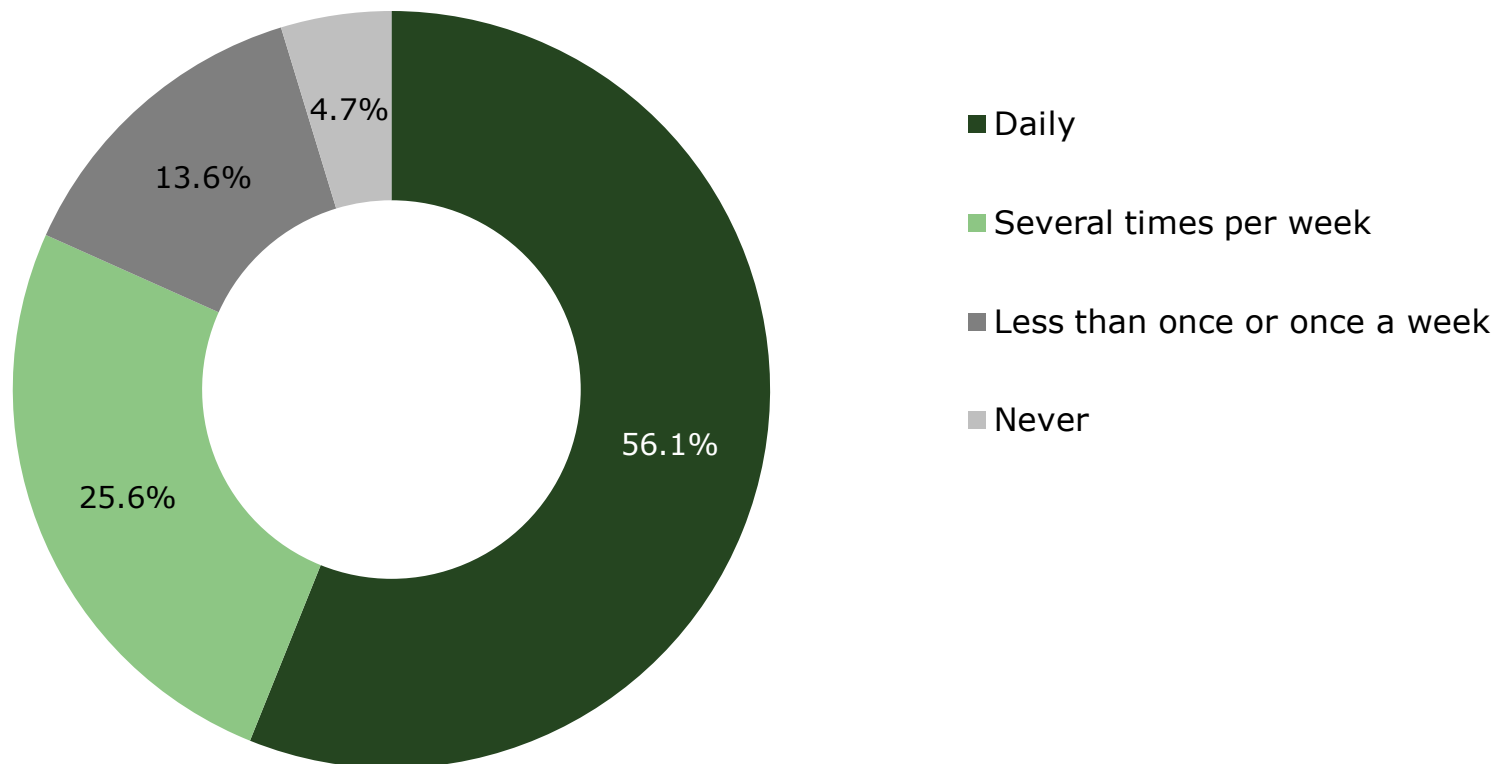
www.communicationmonitor.eu / Zerfass et al. 2011 / n = 2,209 PR professionals; Q 13; Zerfass et al. 2010 / n = 1,955, Q 13: Can you indicate the level of importance for communication management today and in the next year of the following communication tools? Scale 1 (= Not important) - 5 (= Very important); considered scale points 4-5. 2010 data not available for newly added items. Significant differences between assessments of channels in the 2010 and 2011 survey with the exception of items 'Podcasts' and 'Weblogs' (T-test, p ≤ 0.01).

# Communication professionals expect a strong growth in importance for all kind of social media tools

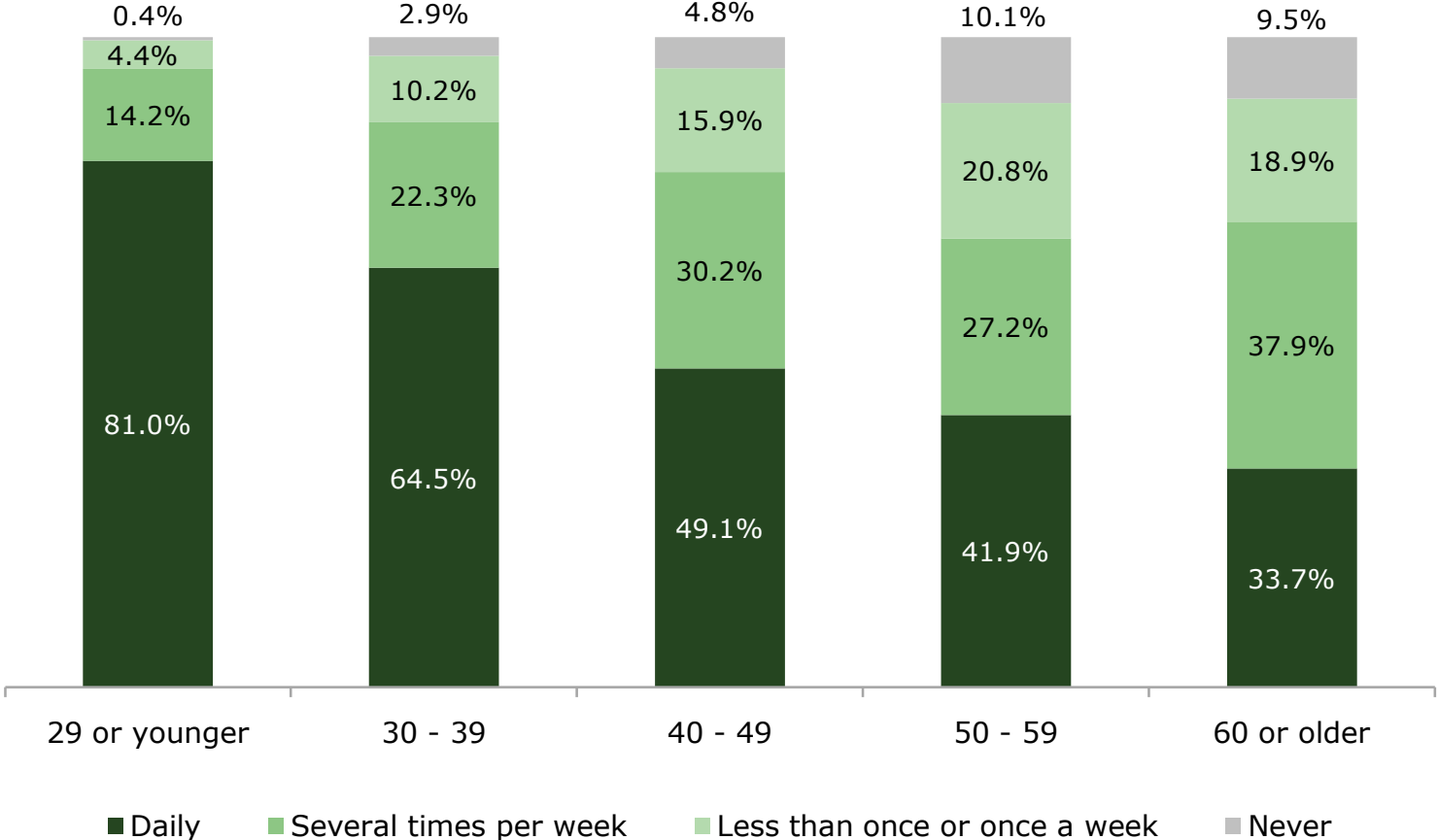


www.communicationmonitor.eu / Zerfass et al. 2011 / n = 2,209 PR professionals; Q 13: Can you indicate the level of importance for communication management today and in the next year of the following communication tools? Scale 1 (= Not important) - 5 (= Very important); considered scale points 4-5. Assessments for 2011 and 2012 correlate strongly ( $r > 0.600$ ) and significantly (T-test,  $p \leq 0.01$ ).

## Private use of social media: 18 per cent of communication professionals are not very active

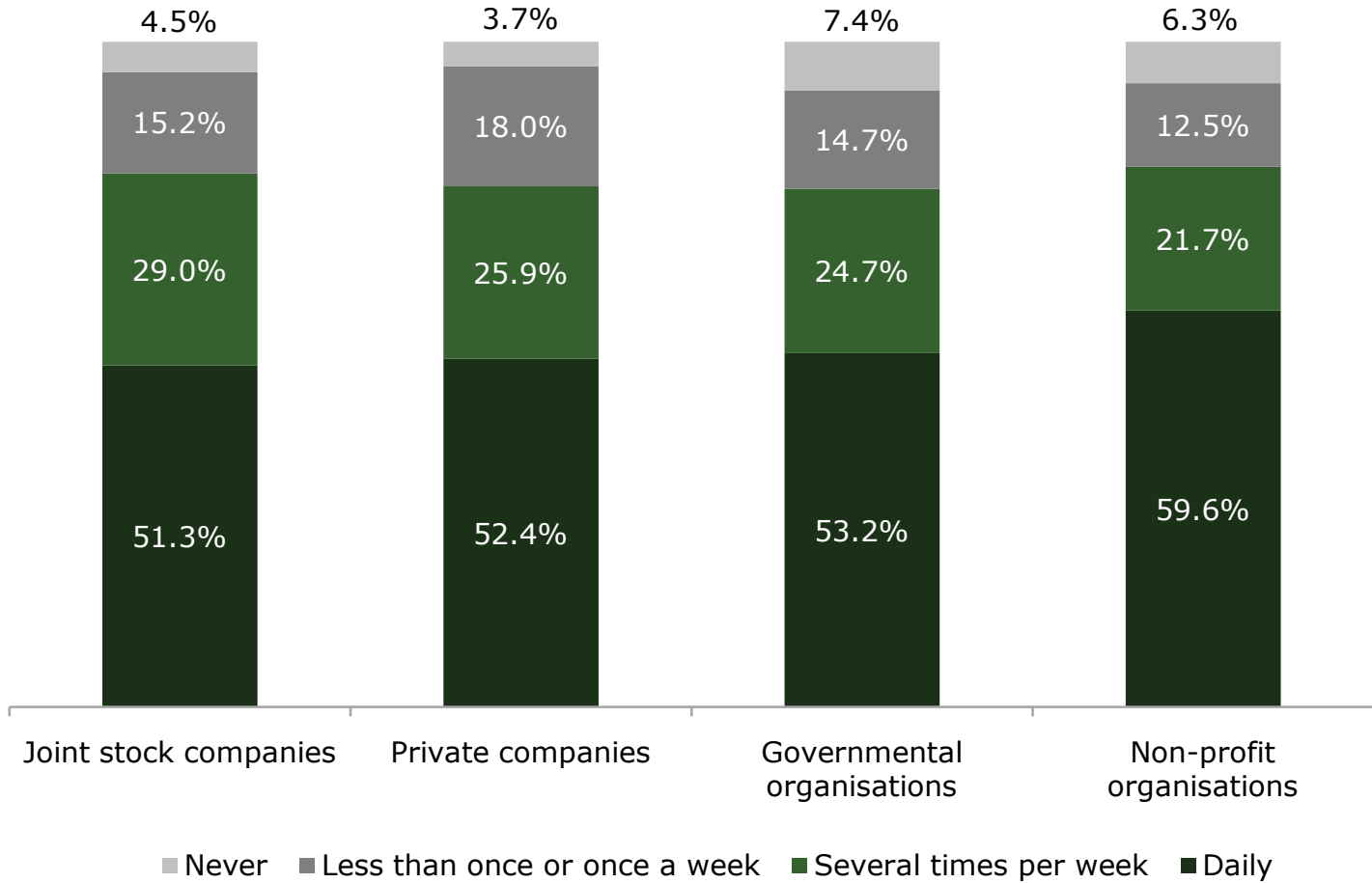


# Private use of social media decreases with the increasing age of practitioners



www.communicationmonitor.eu / Zerfass et al. 2011 / n = 2,209 PR professionals; Q 20: How often do you use social media platforms (Facebook, Linked-In, Twitter, etc.) for private reasons in your leisure time? / How old are you? Significant correlation between the private use of social media platforms and the age of the respondents (Spearman's rho, p<0.01).

# Private use of social media is most common for practitioners working in non-profit organisations



www.communicationmonitor.eu / Zerfass et al. 2011 / n = 2,209 PR professionals; Q 20: How often do you use social media platforms (Facebook, Linked-In, Twitter, etc.) for private reasons in your leisure time? / Where do you work? Significant differences between all types of organisations (chi-square test, p≤0.05).

## Private use of social media differs significantly between European regions

	Northern Europe	Western Europe	Southern Europe	Eastern Europe
Daily	59.1%	49.9%	57.9%	58.8%
Several times per week	24.1%	27.6%	25.2%	25.1%
Less than once or once a week	13.5%	17.1%	11.2%	12.1%
Never	2.8%	5.4%	5.7%	4.8%

## Social media use for private reasons in European countries

Private use of social media	Daily	Several times per week	Less than once/ once a week	Never
Serbia (n = 123)	77.2%	15.4%	6.5%	0.8%
Norway (n = 93)	73.1%	17.2%	9.7%	0.0%
Sweden (n = 88)	68.2%	25.0%	6.8%	0.0%
Croatia (n = 111)	61.3%	24.3%	8.1%	6.3%
Poland (n = 66)	60.6%	18.2%	13.6%	7.6%
Netherlands (n = 120)	56.7%	29.2%	11.7%	2.5%
United Kingdom (n = 237)	56.1%	23.2%	16.5%	4.2%
France (n = 75)	56.0%	24.0%	17.3%	2.7%
Italy (n = 171)	53.2%	28.7%	12.3%	5.8%
Spain (n = 69)	50.7%	29.0%	14.5%	5.8%
Germany (n = 129)	48.1%	27.1%	20.2%	4.7%
Belgium (n = 111)	47.7%	31.5%	15.3%	5.4%
Switzerland (n = 134)	47.4%	26.1%	18.7%	7.5%
Denmark (n = 62)	45.2%	38.7%	14.5%	1.6%
Slovenia (n = 93)	45.2%	28.0%	12.9%	14.0%

## Interpretation

### **Skills and governance structures for social media are lagging behind its importance**

- The survey proves the tremendous growth in perceived importance of online channels in communication management. The number of professionals judging social media as an important instrument for addressing stakeholders has risen from 11.5 per cent in 2007 and 19.5 per cent in 2009 to 40.5 per cent in 2011. However, this is still a minority. Six out of ten practitioners in Europe do not believe in social media, whereas controlled online activities (websites, e-mail) and online media relations are relevant for a clear majority.
- Online communities (social networks) continue to be the most important social media platform. Twitter is still growing. Podcasts, wikis and weblogs have lost relevance during the last twelve months.
- Four out of ten communication departments report about the existence of social media guidelines. Every third organisation has established tools for monitoring the social web. This is a clear advancement since last year. However, key performance indicators to define and evaluate measures of success and training programmes are less prevalent. Governance structures for social media are still underdeveloped.
- European communication professionals have only moderate social media skills. One reason to consider is the private use of social media. Almost every fifth practitioner uses participative platforms only once a week or not at all. The survey reveals that a stronger private use leads to an increase of social media capabilities. As correlations are weaker with business-specific skills, specialised training in those areas is indispensable.

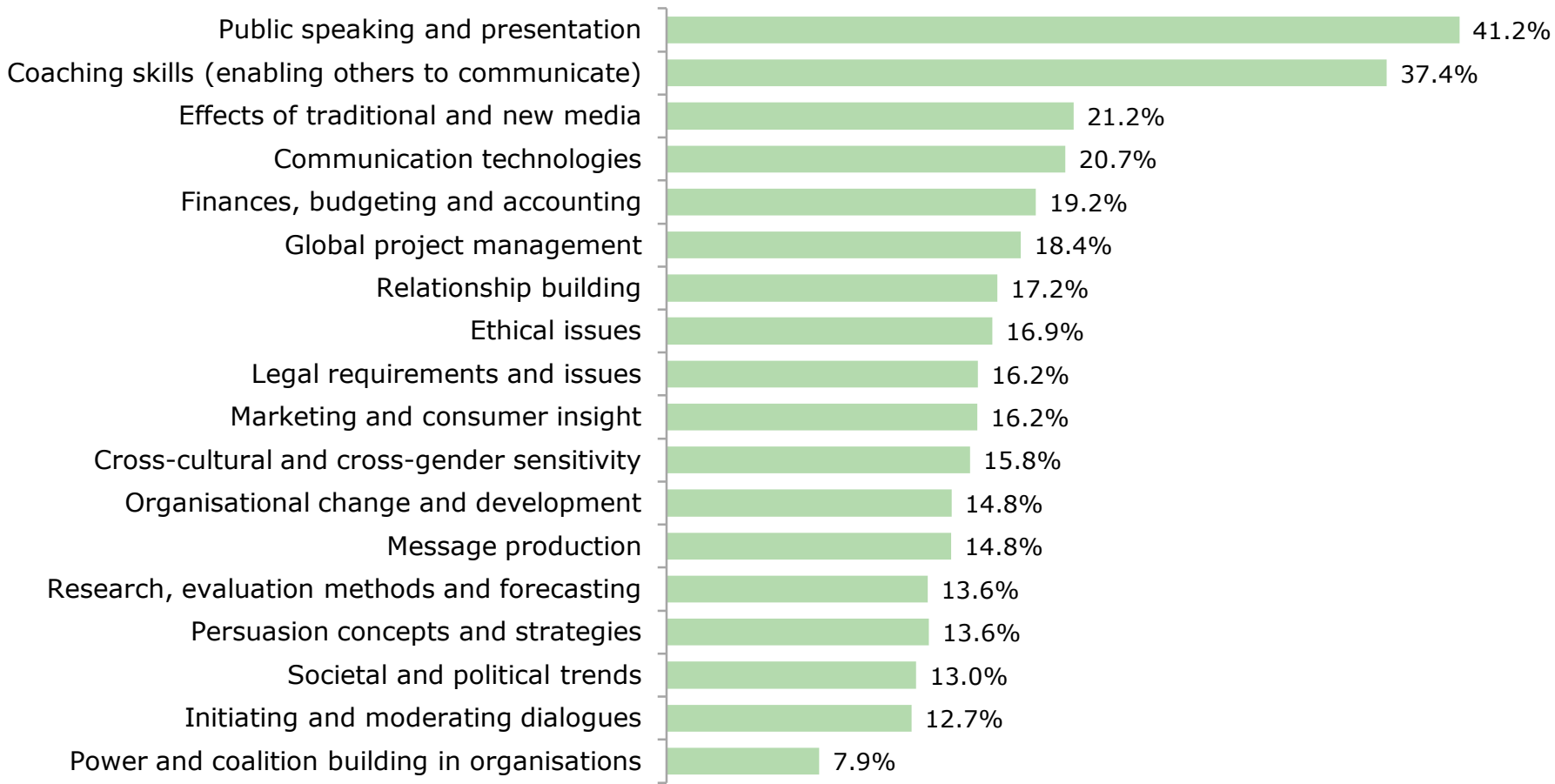


Future qualification needs and training

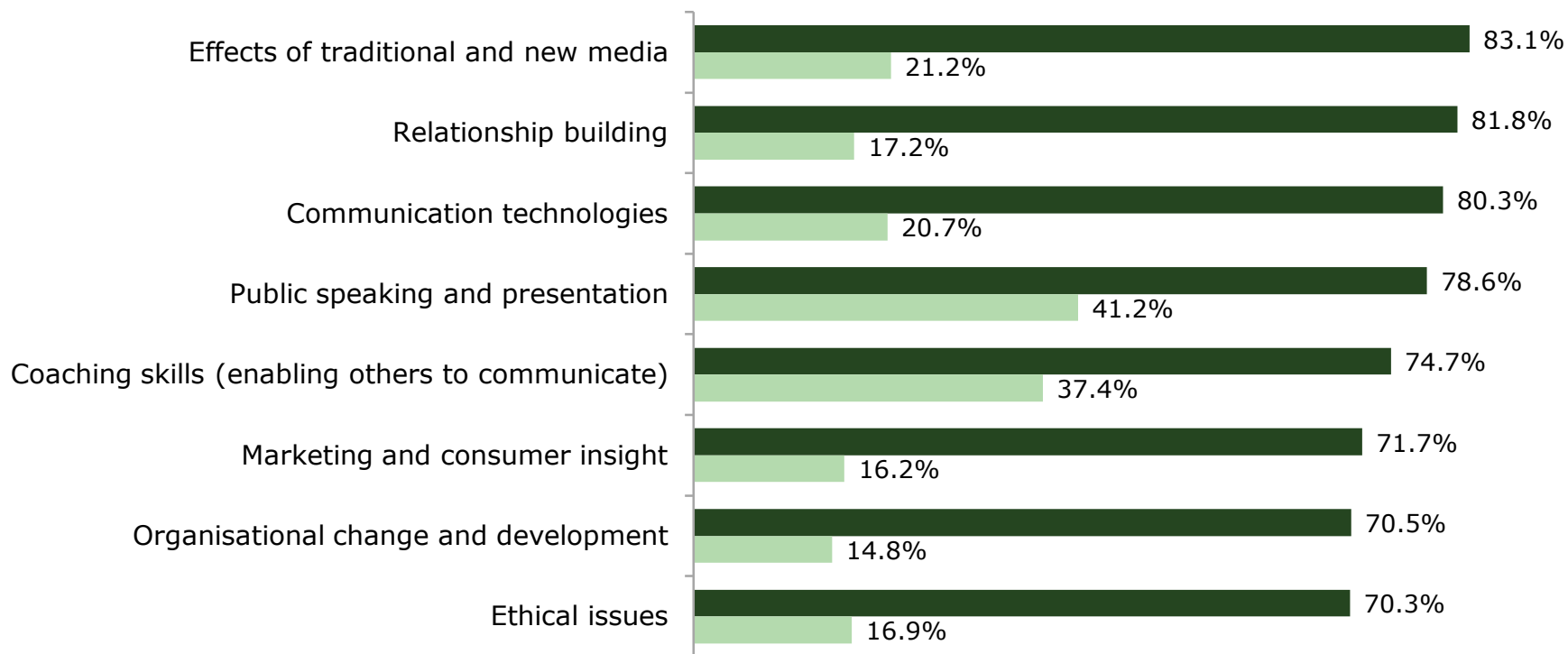
# Perceived importance of knowledge areas and skills for communication managers in five years time



# Training programmes offered by organisations today



## Large gap between qualification needs and training offered today



- Percentage of respondents thinking that a certain knowledge area will be important in five years time
- Percentage of respondents whose organisation already offers training in a certain knowledge area

## Qualification needs perceived in different types of organisations (1)

Knowledge areas important in five years:	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations
Societal and political trends	69.2%	60.7%	73.6%	75.2%
Legal requirements and issues	62.9%	54.7%	55.5%	46.6%
Coaching skills (enabling others to communicate)	78.9%	73.2%	76.0%	70.9%
Global project management	64.4%	65.3%	46.8%	56.1%
Power and coalition building	56.0%	50.8%	47.5%	60.9%
Cross-cultural/cross-gender sensitivity	64.8%	62.4%	55.2%	58.5%
Effects of traditional and new media	78.8%	80.4%	84.7%	87.8%
Persuasion concepts and strategies	65.9%	64.9%	64.7%	59.2%
Relationship building	80.1%	78.1%	79.4%	84.4%
n =	576	365	290	220

## Qualification needs perceived in different types of organisations (2)

Knowledge areas important in five years:	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations
Ethical issues	75.9%	66.8%	68.8%	68.4%
Communication technologies	81.0%	79.6%	82.9%	81.3%
Finances, budgeting and accounting	55.9%	55.4%	47.3%	48.2%
Marketing and consumer insight	78.0%	78.0%	58.7%	65.8%
Initiating and moderating dialogues	70.1%	63.7%	62.4%	62.6%
Research, evaluation methods, forecasting	70.2%	66.8%	70.7%	61.8%
Organisational change and development	75.7%	69.8%	69.9%	63.3%
Message production	74.1%	66.8%	66.3%	70.8%
Public speaking and presentation	81.1%	75.6%	80.1%	79.7%
n =	576	365	290	220

## Training programmes offered in different types of organisations (1)

Training offered:	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations
Societal and political trends	10.6%	9.2%	11.0%	8.7%
Legal requirements and issues	23.4%	14.3%	17.6%	9.4%
Coaching skills (enabling others to communicate)	37.0%	31.8%	36.0%	28.3%
Global project management	28.6%	14.2%	15.1%	11.4%
Power and coalition building	8.4%	6.3%	6.6%	6.7%
Cross-cultural/cross-gender sensitivity	21.5%	13.3%	16.7%	14.7%
Effects of traditional and new media	12.2%	12.7%	16.0%	15.4%
Persuasion concepts and strategies	13.3%	9.7%	8.8%	7.2%
Relationship building	13.7%	16.3%	12.2%	11.2%
n =	576	365	290	220

## Training programmes offered in different types of organisations (2)

Training offered:	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations
Ethical issues	25.6%	11.3%	14.4%	7.6%
Communication technologies	16.2%	17.7%	17.8%	16.5%
Finances, budgeting and accounting	28.0%	14.5%	16.7%	13.6%
Marketing and consumer insight	20.8%	15.1%	8.7%	8.3%
Initiating and moderating dialogues	11.6%	10.7%	9.2%	9.5%
Research, evaluation methods, forecasting	13.3%	8.1%	11.3%	7.0%
Organisational change and development	18.8%	10.8%	11.7%	7.9%
Message production	10.8%	10.2%	7.9%	8.8%
Public speaking and presentation	40.3%	33.8%	37.1%	32.4%
n =	576	365	290	220

## Qualification needs perceived in various European regions (1)

	Northern Europe	Western Europe	Southern Europe	Eastern Europe
Important knowledge fields in five years:				
Societal and political trends	71.7%	64.4%	69.8%	59.6%
Legal requirements and issues	55.5%	53.1%	56.5%	56.7%
Coaching skills (enabling others to communicate)	76.0%	74.0%	74.8%	72.9%
Global project management	49.1%	65.9%	64.5%	56.8%
Power and coalition building	47.7%	55.0%	56.4%	54.1%
Cross-cultural/cross-gender sensitivity	59.0%	61.0%	60.4%	54.1%
Effects of traditional and new media	84.9%	81.6%	81.8%	68.1%
Persuasion concepts and strategies	63.0%	62.6%	71.3%	63.8%
Relationship building	84.7%	78.6%	82.7%	80.9%
n =	571	610	648	216

## Qualification needs perceived in various European regions (2)

	Northern Europe	Western Europe	Southern Europe	Eastern Europe
Importance in five years:				
Ethical issues	63.5%	18.4%	75.4%	73.5%
Communication technologies	75.0%	19.6%	85.6%	82.5%
Finances, budgeting and accounting	51.3%	22.0%	58.2%	54.4%
Marketing and consumer insight	66.9%	14.1%	73.6%	75.0%
Initiating and moderating dialogues	68.2%	16.7%	68.0%	69.6%
Research, evaluation methods, forecasting	59.6%	13.3%	75.3%	74.7%
Organisational change and development	69.3%	18.4%	72.9%	66.2%
Message production	65.1%	14.0%	72.2%	64.4%
Public speaking and presentation	74.7%	41.2%	81.8%	78.1%
n =	571	610	648	216

## Training programmes offered in European regions (1)

Training offered:	Northern Europe	Western Europe	Southern Europe	Eastern Europe
Societal and political trends	13.8%	11.0%	15.2%	9.6%
Legal requirements and issues	19.1%	18.1%	12.5%	14.7%
Coaching skills (enabling others to communicate)	39.6%	35.5%	38.4%	34.4%
Global project management	16.5%	27.8%	14.4%	9.5%
Power and coalition building	5.6%	9.1%	9.4%	6.4%
Cross-cultural/cross-gender sensitivity	17.5%	19.8%	12.1%	11.0%
Effects of traditional and new media	20.3%	19.3%	22.2%	25.6%
Persuasion concepts and strategies	13.8%	14.3%	12.9%	13.8%
Relationship building	15.8%	15.3%	19.7%	18.6%
n =	571	610	648	216

## Training programmes offered in European regions (2)

Training offered:	Northern Europe	Western Europe	Southern Europe	Eastern Europe
Ethical issues	16.5%	18.4%	16.9%	14.2%
Communication technologies	17.2%	19.6%	24.7%	21.7%
Finances, budgeting and accounting	18.7%	22.0%	18.0%	16.6%
Marketing and consumer insight	13.2%	14.1%	19.9%	18.5%
Initiating and moderating dialogues	10.3%	16.7%	11.9%	10.6%
Research, evaluation methods and forecasting	13.3%	13.3%	13.9%	14.7%
Organisational change and development	12.5%	18.4%	15.1%	9.6%
Message production	15.9%	14.0%	15.0%	13.7%
Public speaking and presentation	39.2%	41.2%	43.2%	40.5%
n =	571	610	648	216

## Interpretation

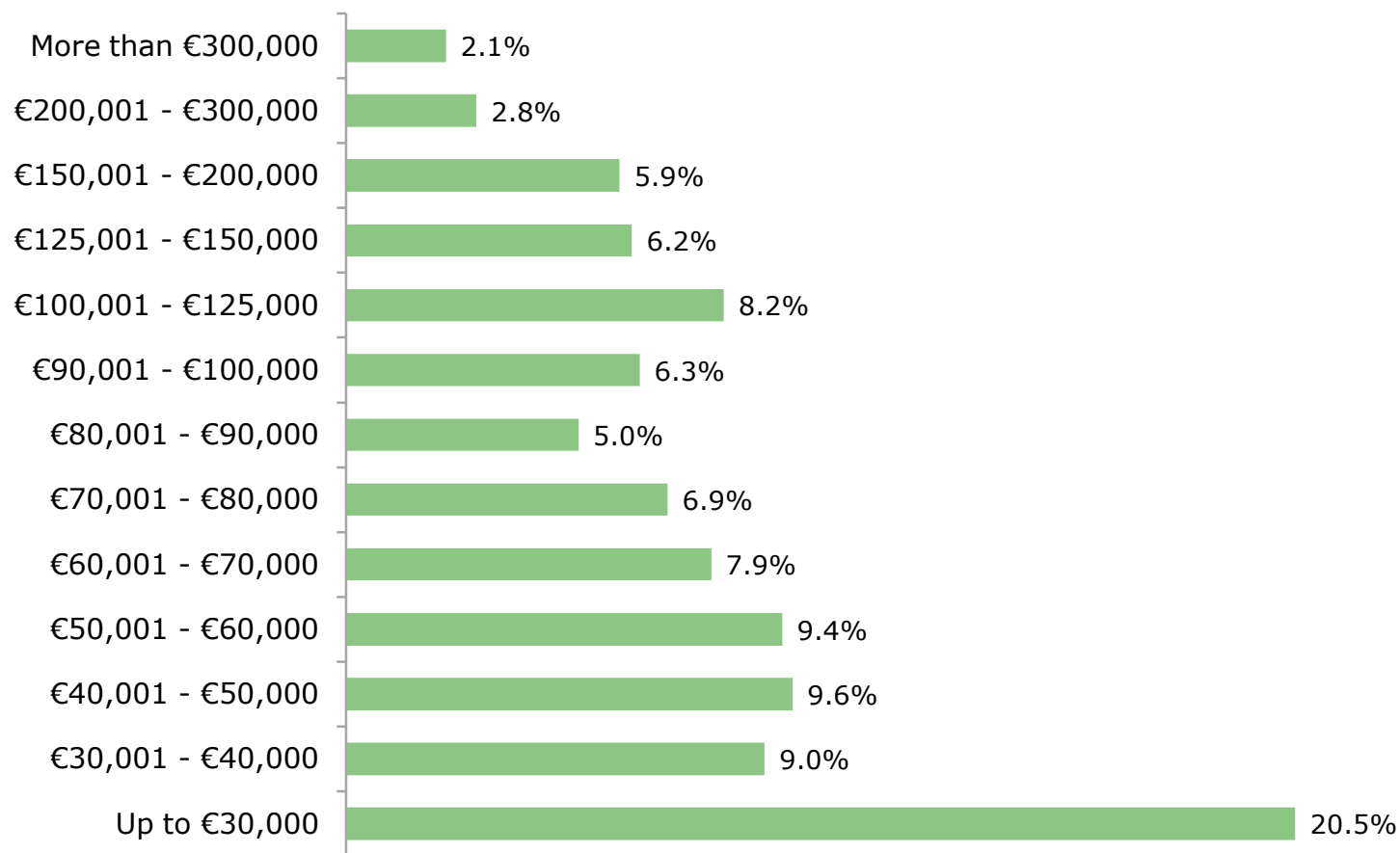
### **Need for a variety of new qualifications needed and focused training programmes**

- In five years time, the most relevant knowledge areas for communication managers will be the effects of traditional and new media, relationship building and communication technologies, followed by hands-on skills like public speaking/presenting and coaching. More than three out of four respondents value these fields as important or very important.
- Qualification needs differ significantly between various types of organisations and regions. For example, cross-cultural and gender sensitivity is especially important in joint-stock companies, while global project management is notably relevant in Western and Southern Europe.
- Quite surprisingly, competencies relevant in organisational settings like power and coalition building, finances, budgeting and accounting as well as legal requirements are only mentioned by every second practitioner.
- A comparison between the qualification needs identified and the training programmes offered by organisations today reveals large gaps in every field. Approximately 40 per cent of all organisations run public speaking, presentation and coaching programmes, but no other issue is dealt with by more than one out of five organisations. This leaves a broad range of possibilities for improvement.

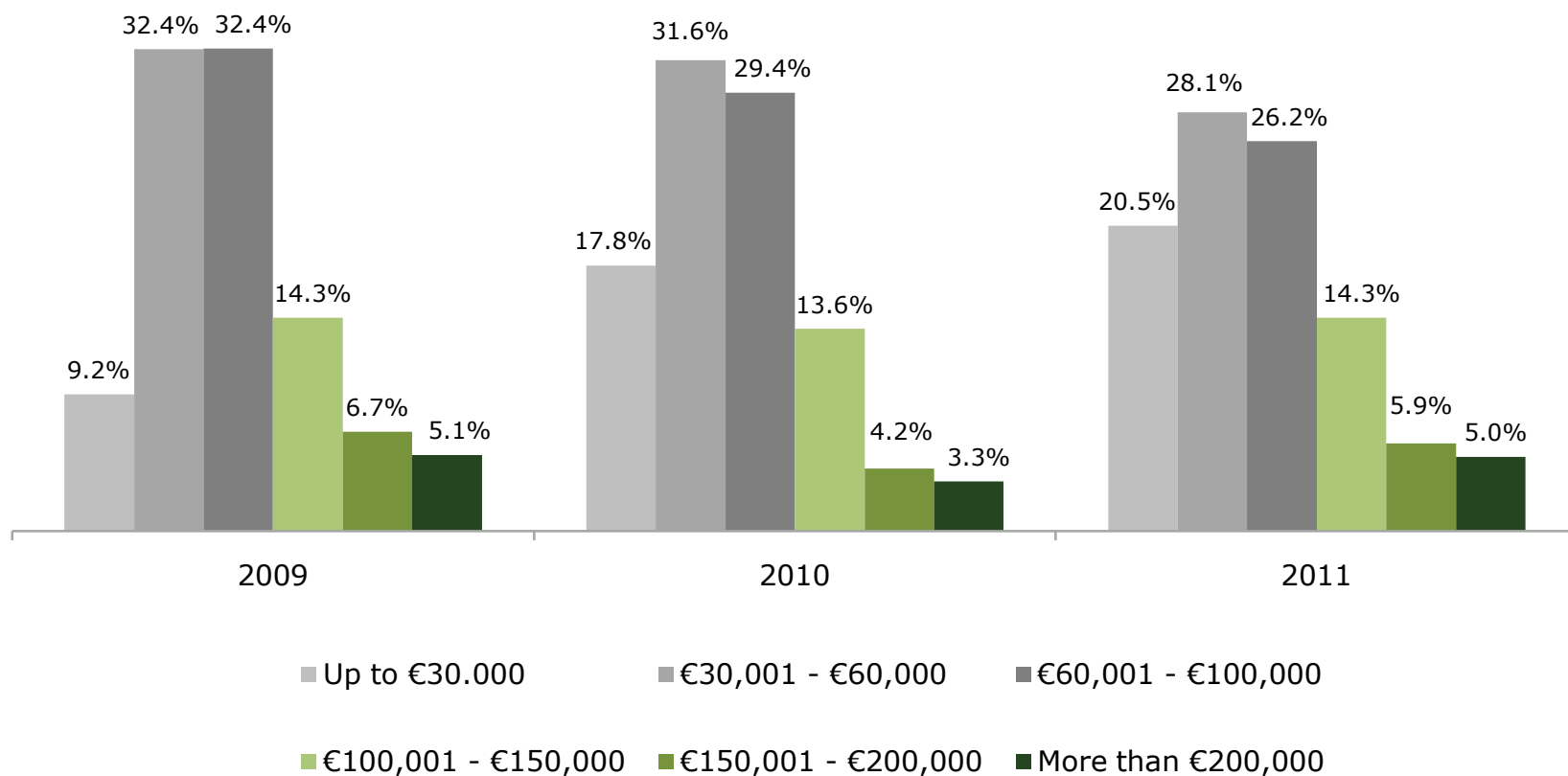


Salaries

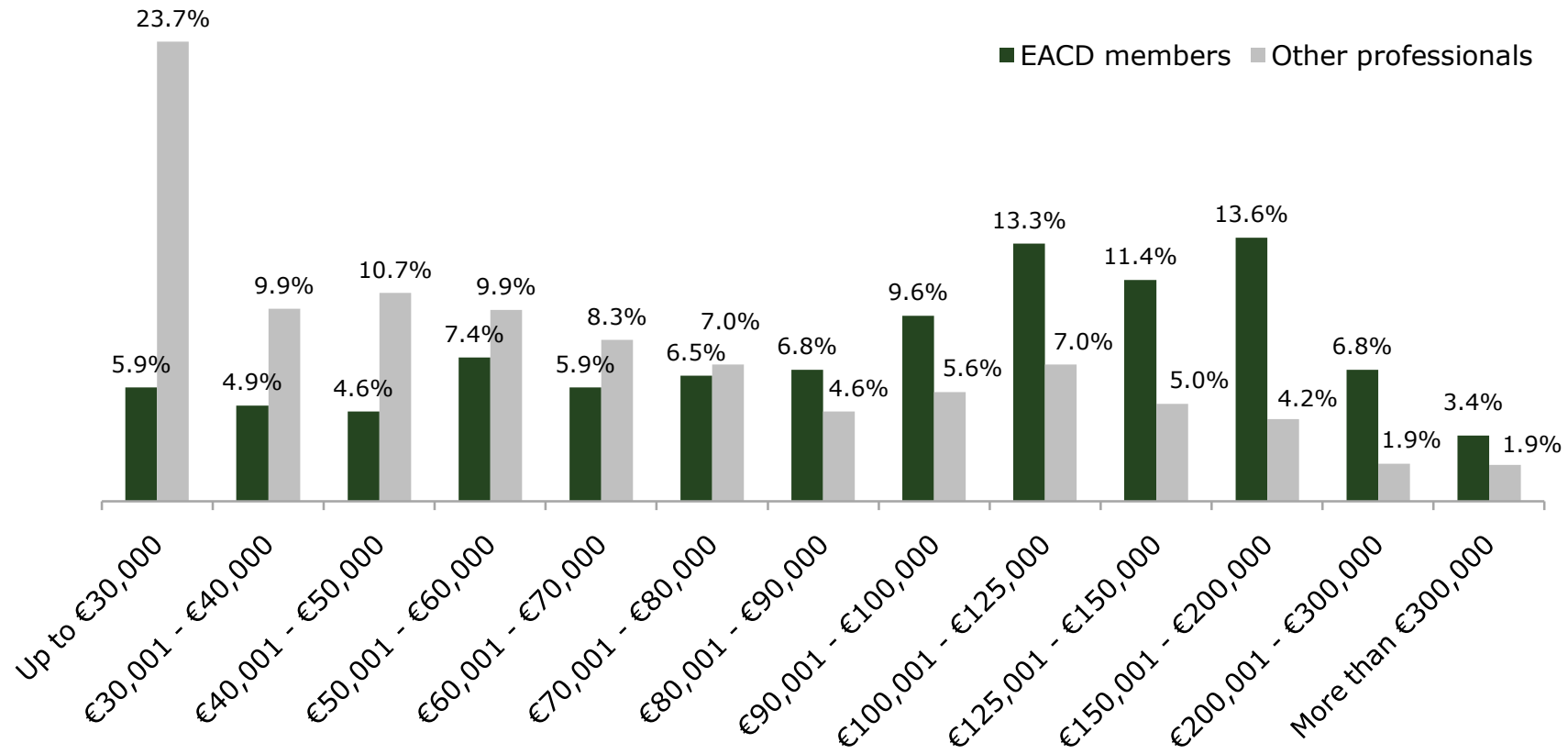
## Basic annual salary of communication practitioners in Europe



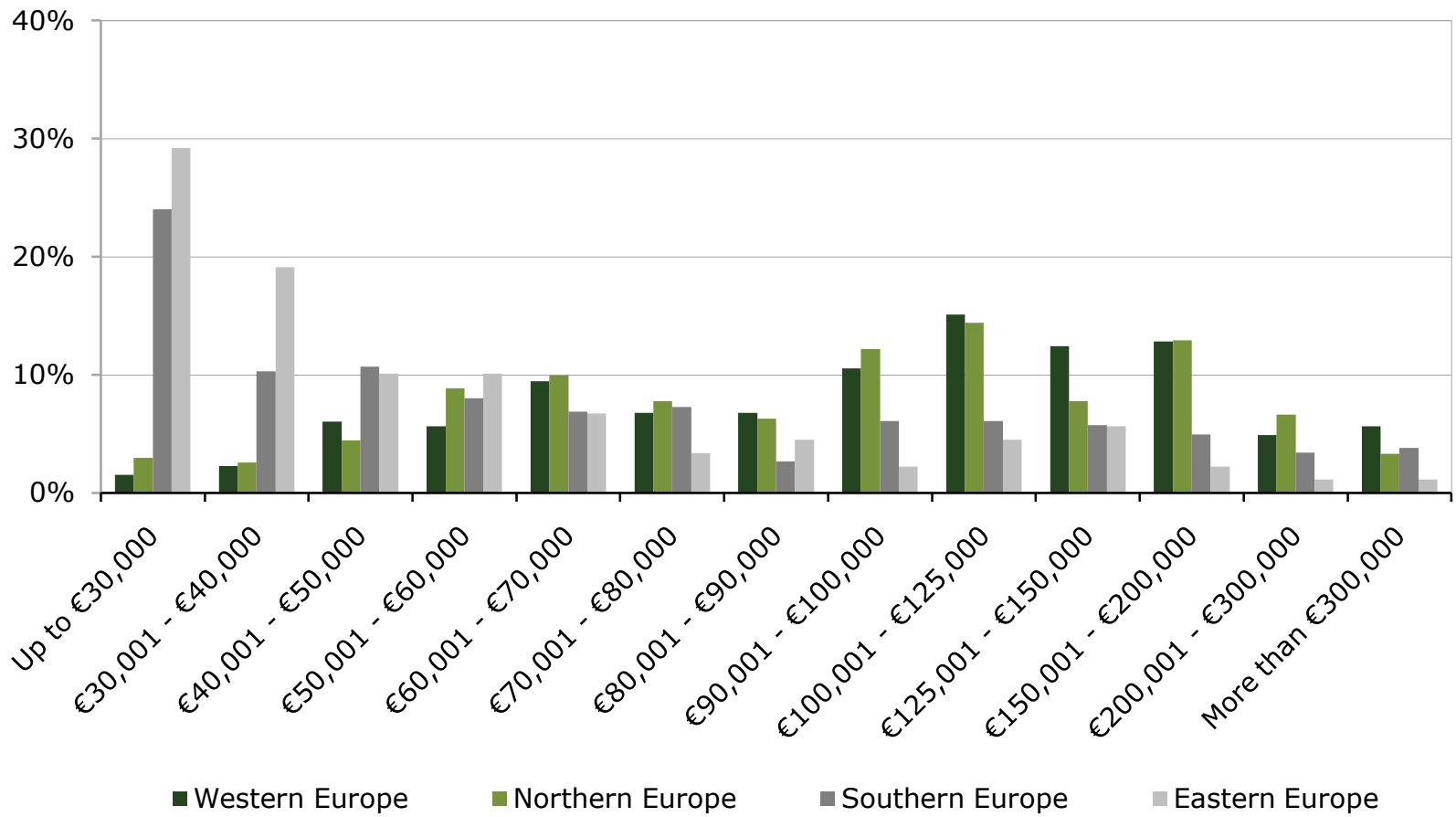
# Development of salaries: More professionals have entered the top ranks, but the low-paid cluster is also growing



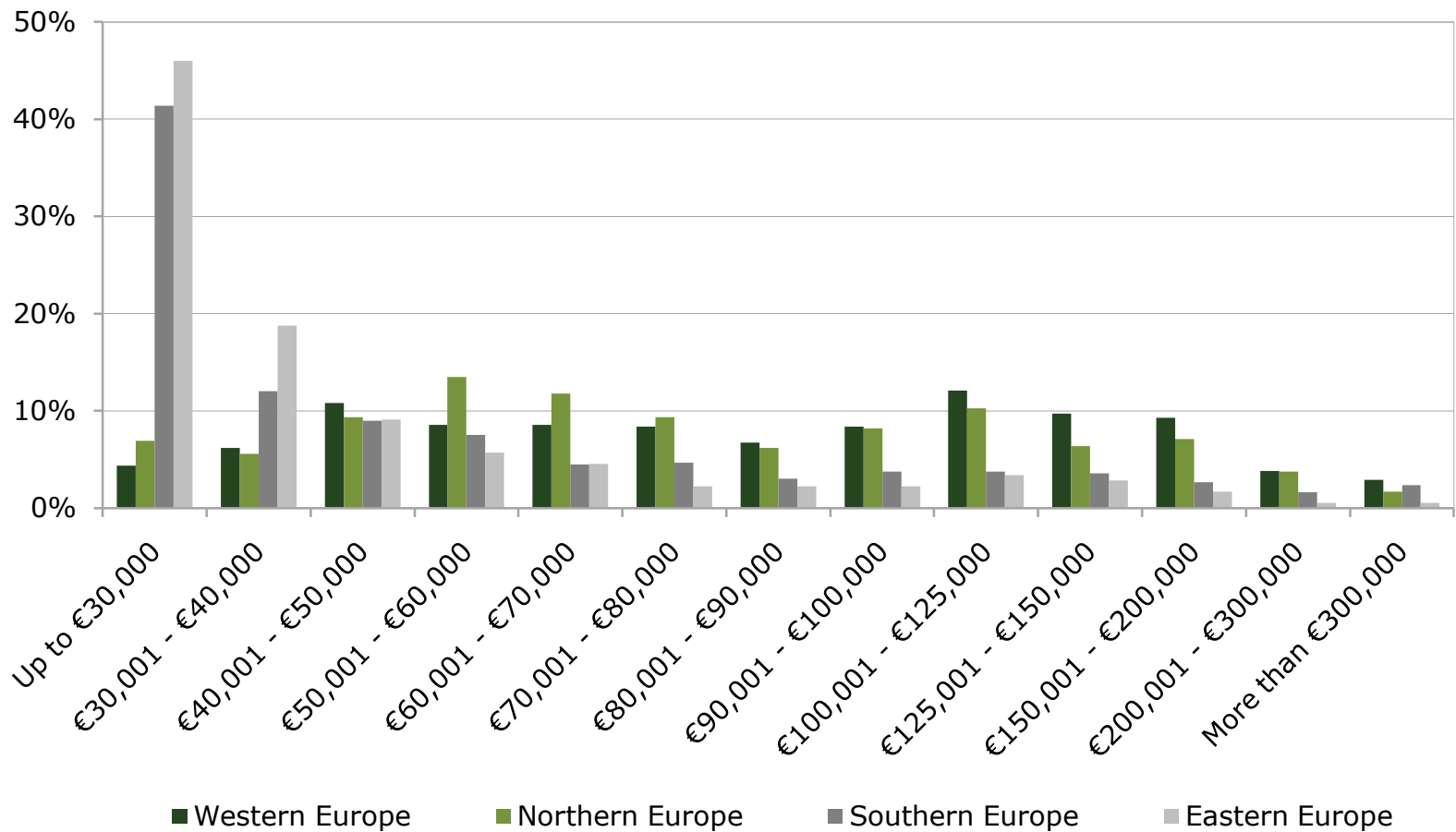
# Every second EACD member will earn more than 100,000 Euros in 2011



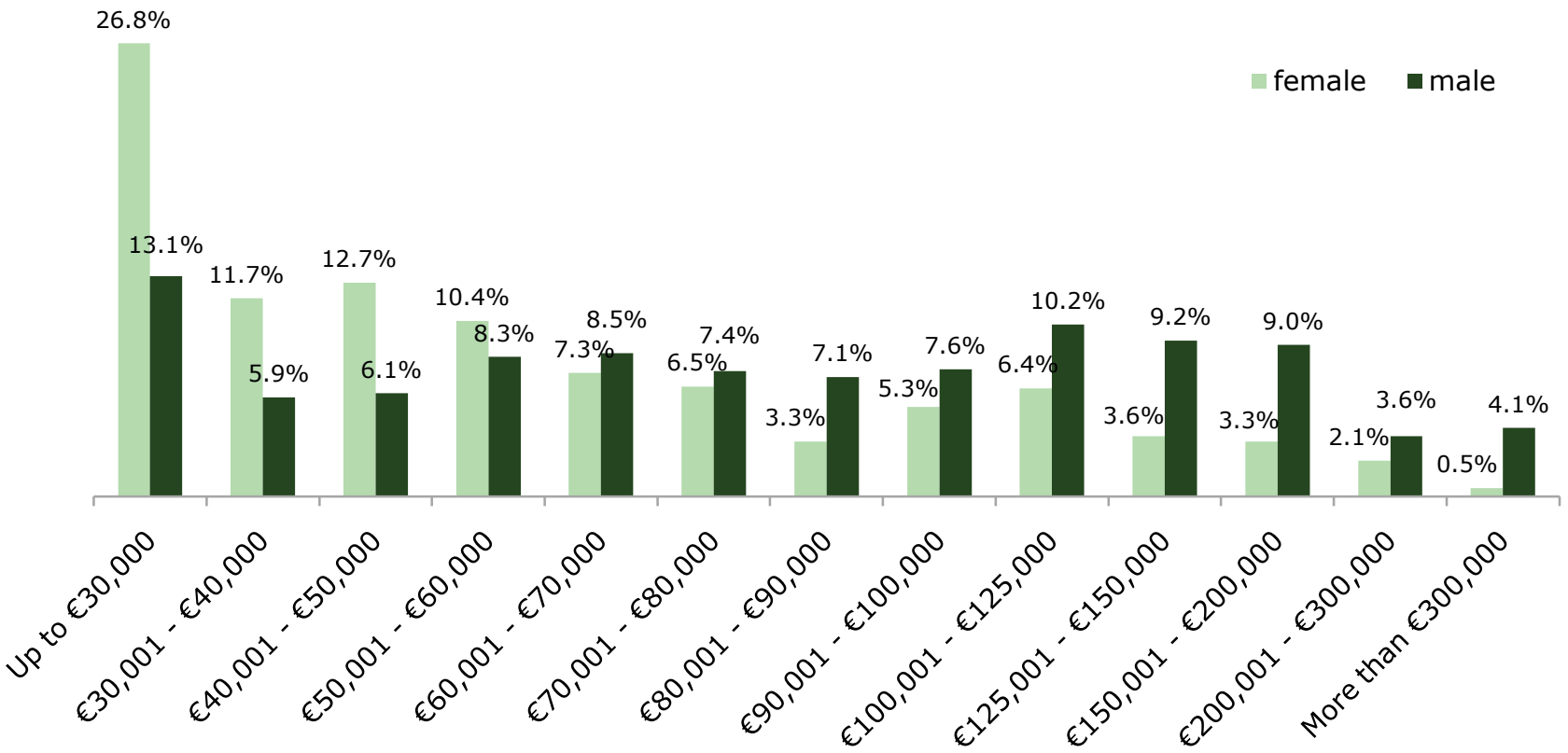
# Annual salary of top-level communicators in different regions (Head of Communication, Agency CEO)



# Most professionals in Eastern and Southern Europe earn less than 40,000 Euros annually



# Annual salaries of female and male practitioners



## Interpretation

### **The number of high-earning communication managers has grown in Europe**

- The survey shows that the decline in salaries identified in 2010 has been stopped. A quarter of the professionals (25.2 per cent) has entered the top bands of 100.000 Euros or more basic income per year. Figures are almost the same as before the crisis in 2009.
- While 5.0 per cent of the respondents will earn more than 200,000 Euros in 2011, a rather large group of 20.5 per cent reports a low annual income of up to 30.000 Euro.
- The growth of the low-paid cluster may be explained by the fact that the regional background of participants is better balanced than in previous surveys. Compared to the 2010 study, this report is based on a higher number of questionnaires from Southern European countries and a lower number from Western Europe. Statistical analyses show that practitioners in Eastern and Southern Europe tend to earn less.
- Salaries of communication professionals differ widely throughout Europe. Also, the average salary (median) of women is lower than the income of their male counterparts on every hierarchical level. Members of the EACD (European Association of Communication Directors) are better paid – 10.2 per cent earn more than 150,000 Euro annually.



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# Imprint

## Publication

Zerfass, A., Verhoeven, P., Tench, R., Moreno, A., & Verčič, D. (2011): *European Communication Monitor 2011. Empirical Insights into Strategic Communication in Europe. Results of an Empirical Survey in 43 Countries (Chart Version)*. Brussels: EACD, EUPRERA (available at: [www.communicationmonitor.eu](http://www.communicationmonitor.eu))

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## Publisher

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## Acknowledgements

Special thanks to Ronny Fechner M.A. and Katharina Simon B.Sc. (University of Leipzig) for their most valuable statistical and organisational assistance and to Grit Fiedler and Neil Cranswick (EACD, Brussels) for helpful suggestions and administrative support.

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Please contact any member of the research team or the advisory board in your country/region if you are interested in discussing the insights of this survey or in joint research projects. Questions regarding the overall research, including sponsorship opportunities for future surveys, may be directed to the lead researcher, Prof. Dr. Ansgar Zerfass, [zerfass@uni-leipzig.de](mailto:zerfass@uni-leipzig.de)

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