

## European Communication Monitor 2012 : Executive Summary

### Overview

The European Public Relations Education and Research Association (EUPRERA) and the European Association of Communication Directors (EACD) have released the results of their annual study on the status quo and trends of communication management across Europe. The international survey, sponsored by Ketchum Pleon, a leading European public relations agency, is based on replies from almost 2,200 communication professionals in 42 countries. A research group of professors from 11 renowned universities, led by Professor Ansgar Zerfass, has conducted the research for the sixth time in a row. It is widely recognised as the largest study in the field of strategic communication worldwide.

The monitor shows that an increasing number of touchpoints with their publics force many organisations to rethink the practices of strategic communication. Shaping the same and consistent image for all stakeholders (a core idea of integrated communications) is nowadays less popular than the concept of polyphony, meaning a simultaneous and sequential stimulation of several perceptions to address different stakeholders. Mobile applications on the social web are seen as important tools, but there are large gaps between their perceived importance and real implementation in most European organisations. Ethical challenges are more prevalent than ever in the field, but current codes of ethics are seldom used and rated as outdated by many professionals.

While the majority of practitioners spend most of their productive time on operational communication, a stronger focus on management, coaching and aligning communication to organisational goals correlates significantly with the influence of the communication function. There is still a large gap between the skills and knowledge which need to be developed and the available training, according to those working in the field. However, employers value specialised competencies when recruiting young communication professionals: university level education in communication management or public relations has become the most important qualification when hiring across Europe, followed by English language skills and internships or on the job training.

Detailed results and sample charts from the report are included below. A free PDF report with full results as well as a YouTube video with the most important highlights is available at [www.communicationmonitor.eu](http://www.communicationmonitor.eu).

## Some of the key findings are:

- Strategic issues: Coping with the digital evolution and linking communication to business strategies are the most important topics to deal with for European communication professionals, today and in the next three years. 46% and 44% of the respondents name these topics when asked for the three top challenges until 2015. Coming third (and new on the list this year) is the need to address more audiences and channels with limited resources for communication (34%). Other important issues are the question of how to strengthen the role of the communication function in helping top management to take strategic decisions (34%) and how to build and maintain trust with the public and society (32%). Strikingly sustainability and social responsibility as well as transparency are considered much less an issue than in the previous years. In 2012, only every fifth respondent (21%) says that sustainability/responsibility is important and only 23% are challenged by transparency and active audiences. In 2011, both issues were considered much more important and mentioned by 37% and 35% respectively. This might be interpreted as a switch to routine mode: many organisations have by now developed programmes for corporate social responsibility communications and found ways to engage with critical publics, so management attention is now focusing on other challenges.
- Ethical challenges and standards: Six out of ten communication professionals in Europe report that they have encountered ethical challenges within the last twelve months, i. e. situations in which activities might be legally acceptable, but problematic from a moral point of view. One third of the respondents have actually experienced several of those challenges. Professionals working in governmental relations, lobbying, public affairs and in online communication and social media are more exposed than colleagues working in other areas. The survey shows that ethical issues are much more relevant than five years ago, driven by compliance and transparency rules, the increase in social media and – to a lesser extent – by the international character of communication today. Despite these challenges, the majority of European communication practitioners has never used a professional code of ethics to solve moral problems. Only a minority of 29% has ever applied such a code. While 32% of the respondents think that current codes of ethics are outdated, an overwhelming majority (93%) find that the communication profession needs such rules. This can be interpreted as a call for action to provide up-to-date guidelines made to fit the digital age in Europe.
- Barriers to professionalisation: One of the ongoing issues in communication management is the further professionalisation of the practice. Identifying the drivers which foster or hinder achievements in the field helps to focus activities on those issues that need special attention. The monitor shows that a lack of understanding of communication practice within the top management (84%) and difficulties of the profession itself to prove the impact of communication activities on organisational goals (75%) are the main barriers for further professionalisation in Europe. So the key challenges for European communication professionals are to explain the communication function to top management and to prove the value of communication for organisations. Other barriers are a shortage of up-to-date communication training (54%) and the poor reputation of professional communication and public relations in society (52%).
- Integrating and coordinating communications: The complexity of communication is increasing. Organisations are interacting with more stakeholders through more media in more directions. 82% of the respondents say that their organisation, compared to five years ago, has more touchpoints with its

publics. According to comparative data, the situation is even more extreme in the United States: the figure there is almost 93%. Three out of four European communication professionals agree that the corporate or organisational voice is created by all organisational members interacting with stakeholders. So it is not surprising that the idea of shaping a consistent image for all stakeholders is supported by fewer respondents than the alternative concept of polyphony, meaning that several perceptions are stimulated simultaneously and sequentially in different stakeholder relationships.

- Practice of strategic communication: Changes in the environment are requiring communication professionals in Europe to reconceptualise and reorganise what they do. Although the majority of productive time still goes to operational communication (talking to colleagues and media, writing texts, monitoring, organising events, etc.) this does not account for more than 37% of a typical week. Managing activities related to planning, organising, leading staff, evaluating strategies, justifying spending and preparing for crises takes 29% of the time. Reflective communication management, aligning communication, the organisation/client and its stakeholders, takes 19% and coaching, training and educating members of the organisation or a client takes almost 15%. As expected, there are significant correlations with the position of a communicator in the organisational hierarchy, with the influence of the communication function (having more influence on top management correlates with more reflection and less operations) and with sectors – all businesses (private companies, joint stock companies and consultancies) allow for more reflexive management than non-profit and governmental organisations. Media relations professionals perform the largest portion of operational work, while practitioners engaged in governmental relations, public affairs and lobbying spend more time on reflective activities.
- Social media: The survey reveals a large gap between the perceived importance of social media tools for communication and the actual rate of implementation in European organisations. Most obviously, mobile applications have entered the top three ranks of important social media platforms, but at the same time the backlog of implementation is higher than in any other field. Online communities or social networks are considered by far the most important social media tool available. With more than 75% support by respondents, they are leading the list of important social media tools, followed by online videos (67%), mobile applications like apps and mobile webs (65%), micro blogs like Twitter (56%) and weblogs (45%). However, less than 56% of the communication departments actually use online communities in their communication, a gap of more than 20% compared to the importance this tool is given by practitioners. The biggest difference between importance (65%) and implementation (31%) is found for mobile applications, a gap of almost 35%. A cross-matrix analysis shows that mobile applications, weblogs and photo sharing are considered the most important opportunities in social media communication. All communication managers report rather moderate skills for using digital technologies for internal and external communication, regardless of their gender. Despite this, only every second respondent thinks that training is useful. Informal approaches to enhance those skills are clearly favoured. Eight out of ten European professionals think that the best way to learn about online tools is to use them as part of the regular work as well as privately.
- Professional training and development: As communicators are moving from mostly operational to more managerial, educational and reflective levels, building competencies and skills is the next big challenge both for individuals and organisations. However, current levels of knowledge and needs for further development are mostly evaluated through informal self-assessments: comparing oneself with

colleagues and peers in other organisations is the most important method across all sectors (65%). Breaking out of this fallacious circle by consulting academic knowledge or using formal self-evaluation systems by organisations is only valued by 27% and 17% of respondents, respectively.

- Management, business and communication qualifications: The monitor reveals significant gaps between the development needs of communication professionals in Europe and the training opportunities currently offered by their organisations. The only field in which supply meets demand are traditional communication skills, i.e. written, oral and message production. The largest gap, almost 31%, is in management knowledge (current affairs, social and political trends, legal, ethical). This is particularly important as this is exactly the type of knowledge delivered at universities which communicators and their employers use the least for their development. Major gaps also exist in business knowledge (markets, products, competitors) and management skills (decision making, planning, organising, leading) with 22% each. Interestingly, these are also the three areas where most professionals report a need for personal development. These areas are consistently rated at the top even among practitioners with more than ten years of experience on the job – which indicates that on-the-job training is simply not enough, although for the majority of management capabilities mileage counts.
- Recruiting young professionals: University level education in communication management or public relations has become the most important qualification when organisations recruit early career professionals. This criterion was named by 59% of the professionals surveyed as one of the top three attributes to consider. The next important qualifications in descending order are: knowledge of the English language (52%); internships or on the job training (45%); professional qualification in public relations or communication as trained by associations and training institutes (43%); university education in any or another subject (29%); and international experience (28%). Less sought after are business and management qualifications, extra languages and a university education in business administration. However, the monitor also reveals regional differences which require further investigation: university education is most valued in Southern Europe (62%), followed by Northern Europe (59%), Western Europe (56%) and Eastern Europe (56%). In the United Kingdom, university education in public relations is rated only half as important as the European average (30% versus 59%). On the contrary, university level education in the field is highly valued in Norway (79%), Spain (77%), Sweden (74%) and the Netherlands (73%).

### **About the organisers**

With members from more than 30 countries, the European Public Relations Education and Research Association (EUPRERA) is an autonomous organisation 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. More information is available at [www.euprera.org](http://www.euprera.org).

The European Association of Communication Directors (EACD) is the leading network for communication professionals across Europe with more than 2,000 members. It brings in-house communication experts together to exchange ideas and discuss the latest trends in international public relations. Through Working Groups on specific communications topics and diverse publications, the EACD fosters ongoing professional

qualification and promotes the reputation of the profession. More information is available at [www.eacd-online.eu](http://www.eacd-online.eu).

**Contact**

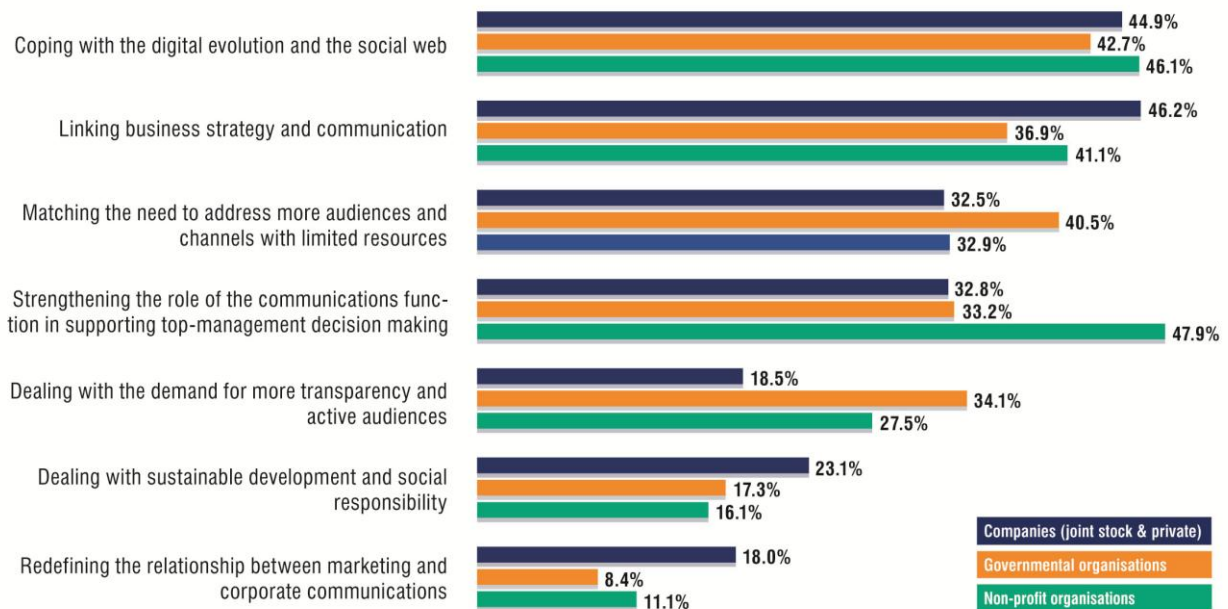
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**Sample charts from the European Communication Monitor 2012 survey**

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High-res versions of the figures are available for download at [www.eacd-online.eu](http://www.eacd-online.eu) in the Press Room section.

Most important strategic issues for communication management in various types of organisations



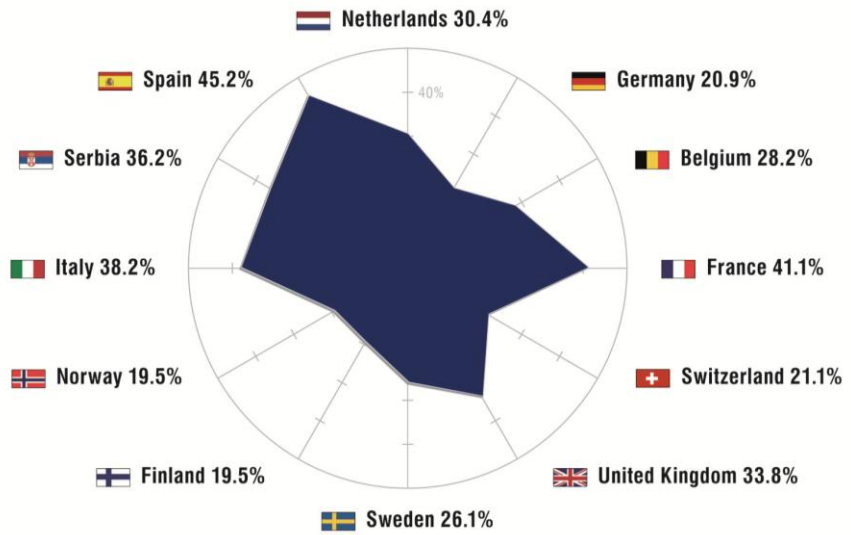
[www.communicationmonitor.eu](http://www.communicationmonitor.eu) / Zerfass et al. 2012 / n = 1,712 PR professionals working in communication departments; Q 9: Please pick those three issues which you believe will be most important for public relations / communication management within the next three years!

Today's codes of ethics are criticised by communication professionals across Europe

COMMUNICATION PROFESSIONALS IN EUROPE

**31.7%**  
state that typical codes of ethics provided by the PR profession are outdated today

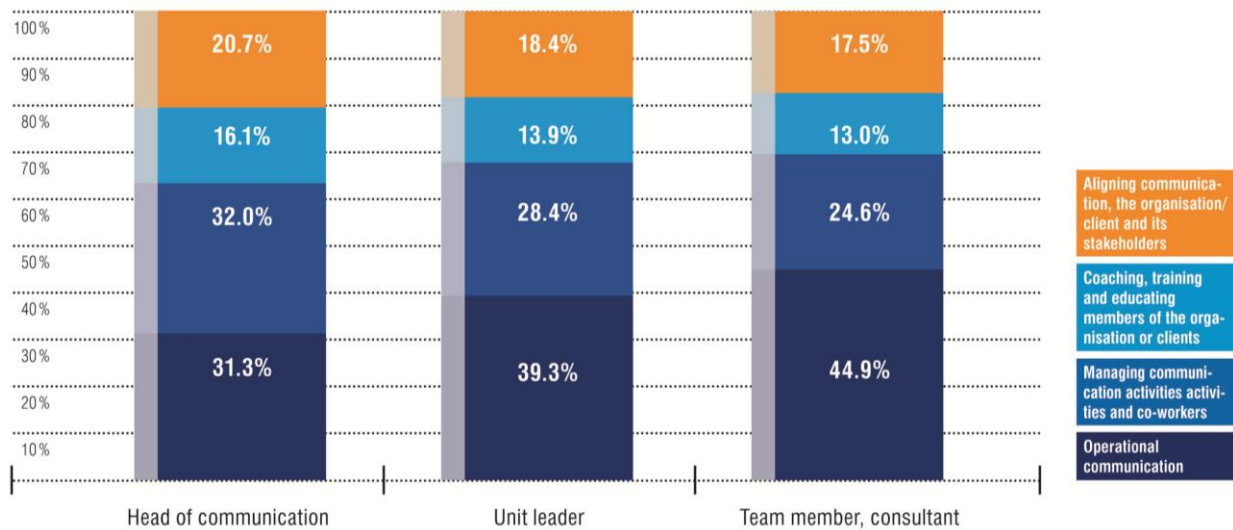
COUNTRY-TO-COUNTRY ANALYSIS



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,185 PR professionals. Q 2: What do you think of these statements? Typical codes of ethics provided by the PR profession are outdated today. Scale 1 (strongly disagree) – 5 (totally agree). Considered scale points 4-5.

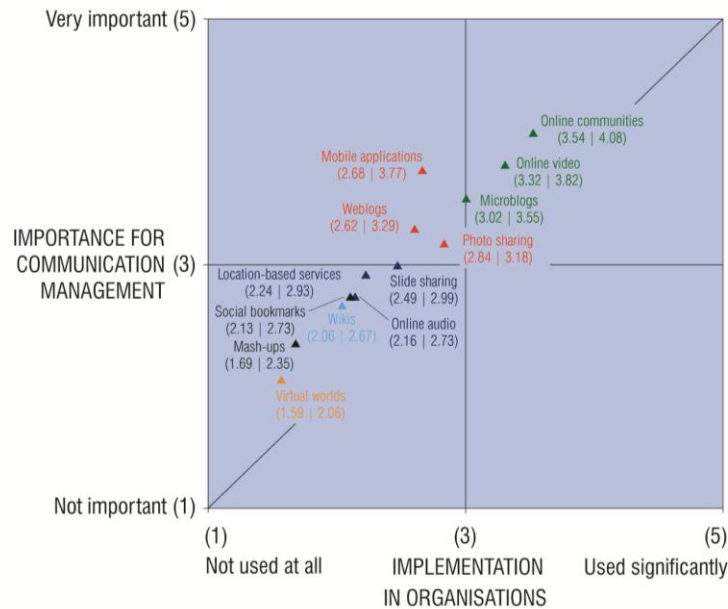
How communication professionals spend their productive time at work

Productive time spent at work...



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,185 PR professionals. Q 7. Medians. Scale 0%-100%. Highly significant differences for all items (Kendalls rank correlation, p ≤ 0.01).

## Importance and implementation of social media tools in communication management in Europe



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 1,925 PR professionals. Q 10 / Q 11.

## Professional development needs and trainings offered in communication management

SKILLS AND KNOWLEDGE	... NEED TO BE DEVELOPED	... TRAINING OFFERED/ FACILITATED IN OWN ORGANISATION	GAP BETWEEN NEED AND OFFERING
Management skills (decision making, planning, organising, leading, human resources, self management)	45.8%	23.7%	-22.1%
Management knowledge (current affairs, social and political trends, legal, ethical)	42.2%	11.7%	-30.6%
Business knowledge (markets, products, competitors)	38.5%	16.2%	-22.3%
Business skills (dealing with budgets, invoices, contracts, taxation)	32.8%	17.0%	-15.8%
Communication knowledge (theory and principles, e. g. audiences, program development, campaigning, evaluation etc.)	27.4%	10.6%	-16.7%
Communication skills (written, oral, message production)	18.6%	19.4%	+1.4%

www.communicationmonitor.eu / Zerfass et al. 2012 / n<sup>min</sup> = 1,673 PR professionals working in communication departments. Q 20: 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? Scale 1 (no need to develop) – 5 (strong need to develop). Considered scale points 4-5.