

European Communication Report 2007

A survey by the European Association of
Communication Directors (EACD) and
the Institute of Media and Communications
Management at the University of St. Gallen

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Foreword

What will be the major challenges for Communication professionals in the future? How influential are communicators within their organisations? How much money do they earn? How satisfied are they with their jobs?

These and other important questions are being answered by the "European Communication Report 2007". The survey among almost 1,200 communication professionals across Europe portrays the professional backgrounds, challenges and working environments of communication directors and spokespeople Europe-wide.

The online study has been conducted by the European Association of Communication Directors (EACD) and the Institute for Media and Communication Management at the University of St. Gallen.

This publication should provide deep insights into the state of our profession, illuminating trends and developments in communications from across Europe. Indeed, it is the ambitious scope of the study, covering all of Europe, which gives its results such potential pertinence. Fostering qualification within the field of communication is one of the EACD's main objectives. We believe that this first European Communication Report is a good basis for the association's work towards this goal.

Dr. Herbert Heitmann
President
European Association of Communication Directors (EACD)

Summary

Communication across national boundaries is a management task of increasing importance within a constantly developing European Union. For communicators in multinational companies, associations, institutions and politics, the European perspective is crucial in their strategic and practical work. Still, there is very little knowledge about the transnational aspect of the communication profession. As of today, no comprehensive Europe-wide study exists that explores the professional backgrounds, challenges and working environments of in-house communication experts all over Europe. Consequently, the joint survey of the EACD and the University of St. Gallen, which we present to you on the following pages, intends to take a closer look at the issues on hand, from an international perspective.

The insights are quite informative about the state and the growing importance of the profession. Altogether, 1171 communication professionals from all over Europe participated in the survey. The better part of them, 85%, worked for companies in the private sector, about 70 % of these corporations were listed. Although said companies covered a wide variety of industries, participants predominantly worked for very large organisations with more than 10.000 employees.

The overall number of participants was evenly split between male and female respondents, in the majority of cases they were aged between 30 and 50 years. As a testament to the strategic importance of communication expertise within organisations, the salary level of respondents was comparable to other management functions. Almost every third communication professional participating in the survey earned more than 100.000 EUR. With regards to remuneration policy, private companies paid on average significantly higher salaries than institutions under public law or public policy. Only about 14% of the overall salary was related in one way or another to the profitability of the organisation, although 70% of participants reported regular success measurement of their activities.

Still, despite the even distribution between male and female respondents, and no significant gender differences regarding job positions, only 30% of top earners are female.

Organisations and their communications function increasingly operate in a complex and challenging environment, necessitating a diverse set of personal and professional skills as well as organisational capabilities. Nearly 90% of respondents hold an academic degree, mainly either in the area of business and economics or in humanities and social sciences. In addition, a large proportion of participating communication professionals had significant previous work experience, if not in the field of Public Relations itself, then usually either in marketing or journalism. Work experience was with only few exceptions supplemented by some form of PR-specific training. Interestingly though, the overall educational level did not prove to have a noticeable impact on either the participants' positions or salaries.

Regarding organisational capabilities, communication departments were usually responsible for national or worldwide operations; regional responsibility was very much the exception. The budget size to fulfil the tasks at hand were on average between 250.000 and 500.000 Euro, though the private sector had significantly higher communication budgets available than had public institutions, which may also account for the differences in income between the private and the public sector. Overall, the size of communication budgets increased in the past and is expected to continue to further increase in the foreseeable future.

Besides the financial endowment of the communications function, the organisational integration is another determining factor for the strategic importance of the profession. It turned out that communication professionals hold a significant level of responsibility within their organisation, 40% of respondents were responsible for the entire organisational communication of their employer, and furthermore nearly half of the communication departments were embedded on the top-management level – a sign of the growing recognition of the importance of professional communication and the strategic imperative to foster a positive image for the organisation.

In summary, the survey provides us with first insights into what might become interesting discussion points for the European Communication Summit and beyond. With regards to the state of the profession, the good news is that the average job satisfaction was exceedingly high, providing respondents with challenges and diversity – more so than stress. This, however, is no reason for us, as professionals as well as researchers, to sit back and relax, as a genuinely European PR-Community is still in the stage of formation. It is up to us to support and advance the further strategic integration and internationalisation of the profession. For it holds true that a profession has from time to time to think and to reflect about its very foundations, so as to cope with the challenging and ever changing industry and competition environments organisations are facing nowadays. We hope that this study makes a contribution to this process, and that it serves as the basis for discussion among the members of the European Association of Communication Directors.

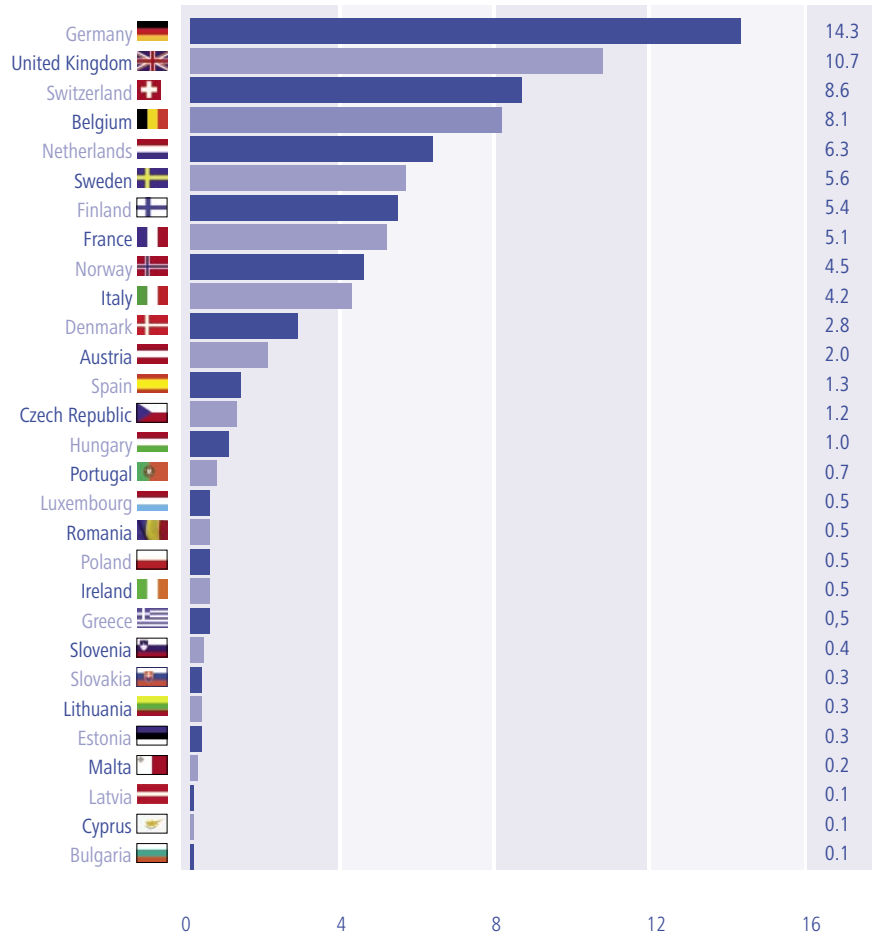
Prof. Dr. Miriam Meckel
Director
Institute for Media and Communication Management
at the University of St. Gallen

1.

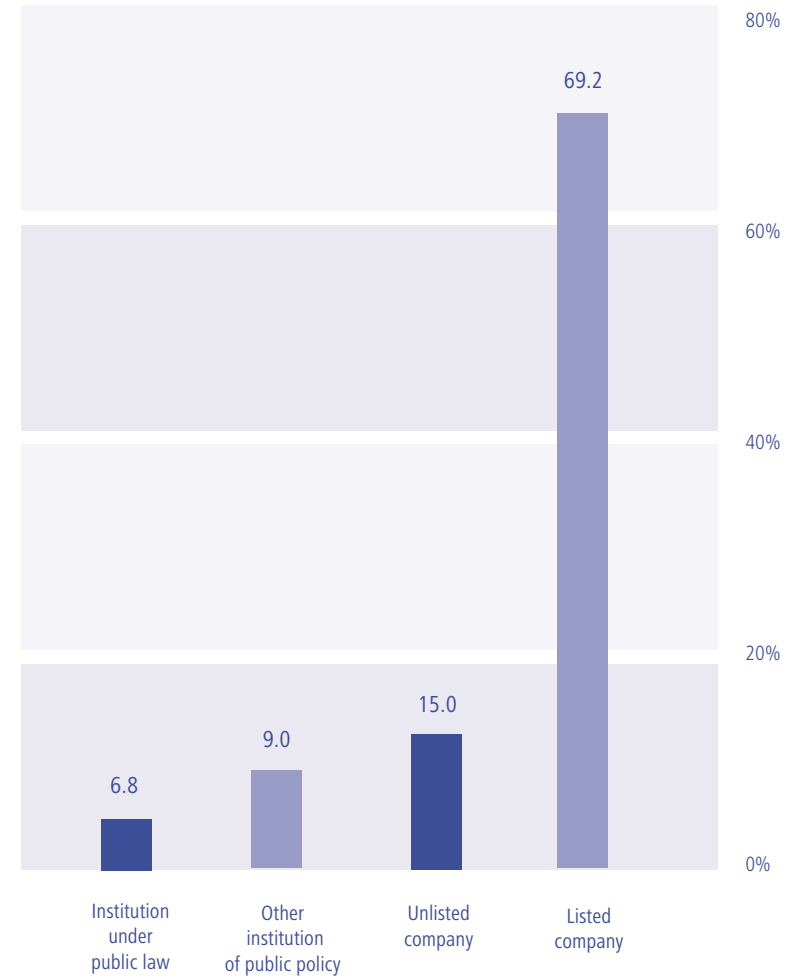
Organisational Data

Organisations are mainly from Western Europe.

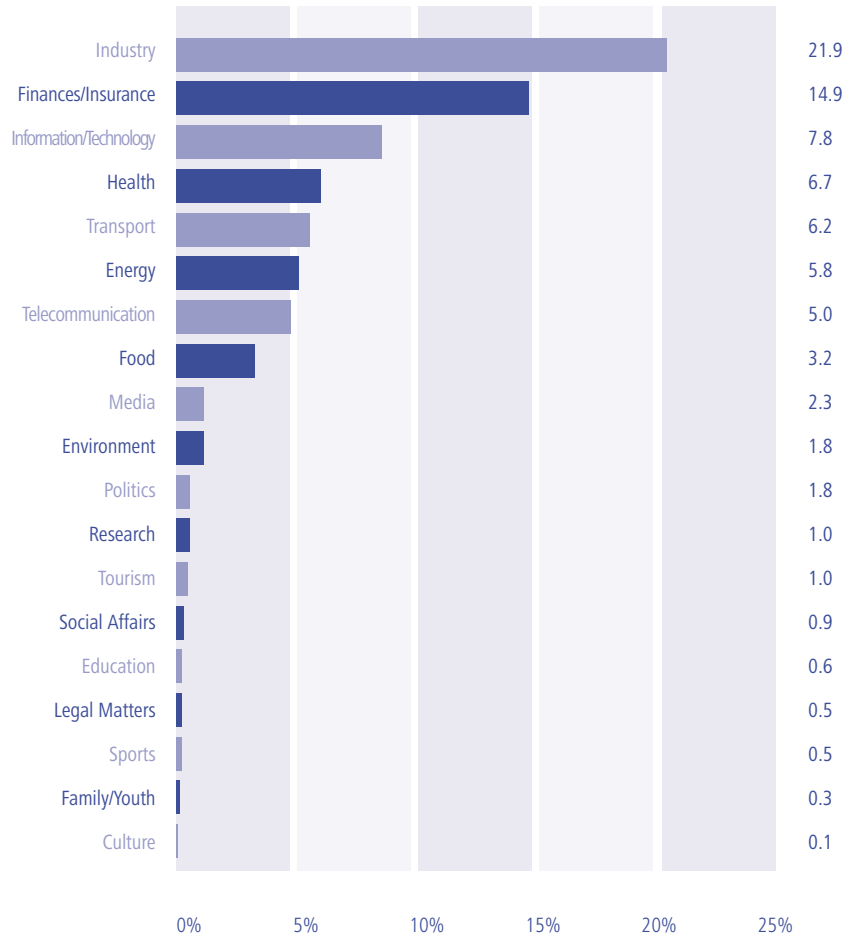
Headquarters



A majority of participants work for listed companies.

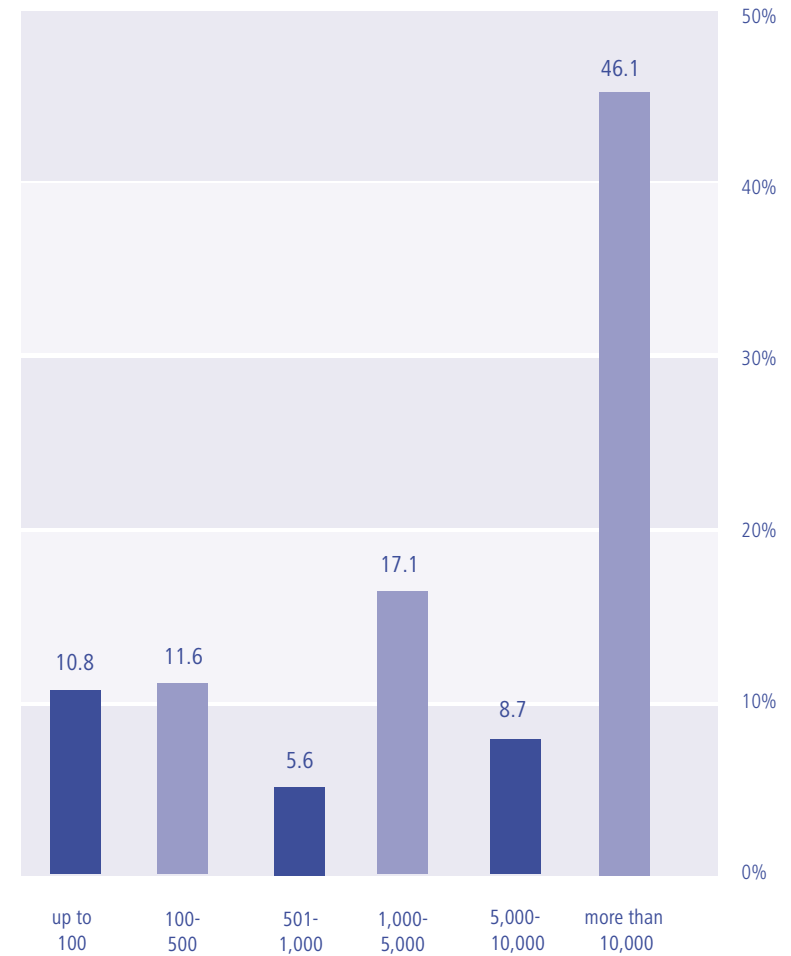


Participants are spread throughout all relevant industries.



Participants work predominantly for large organisations.

Employees

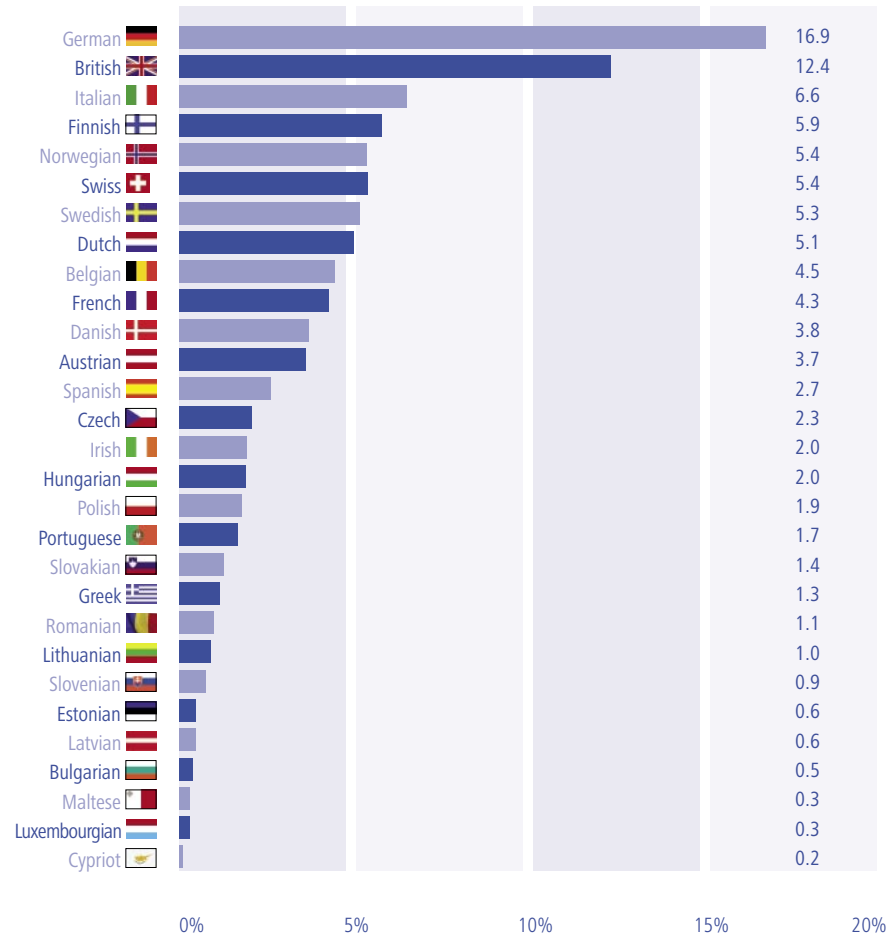


2.

Personal Data – General Information

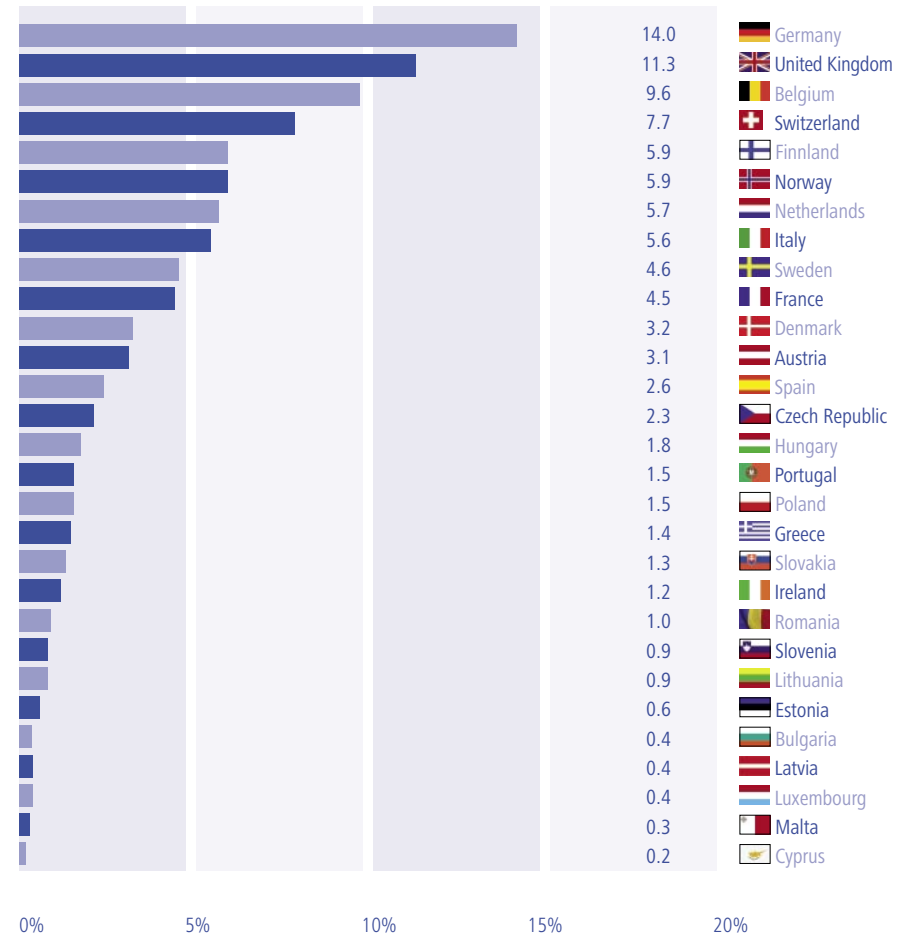
The survey managed to cover a wide variety of European countries.

Nationality

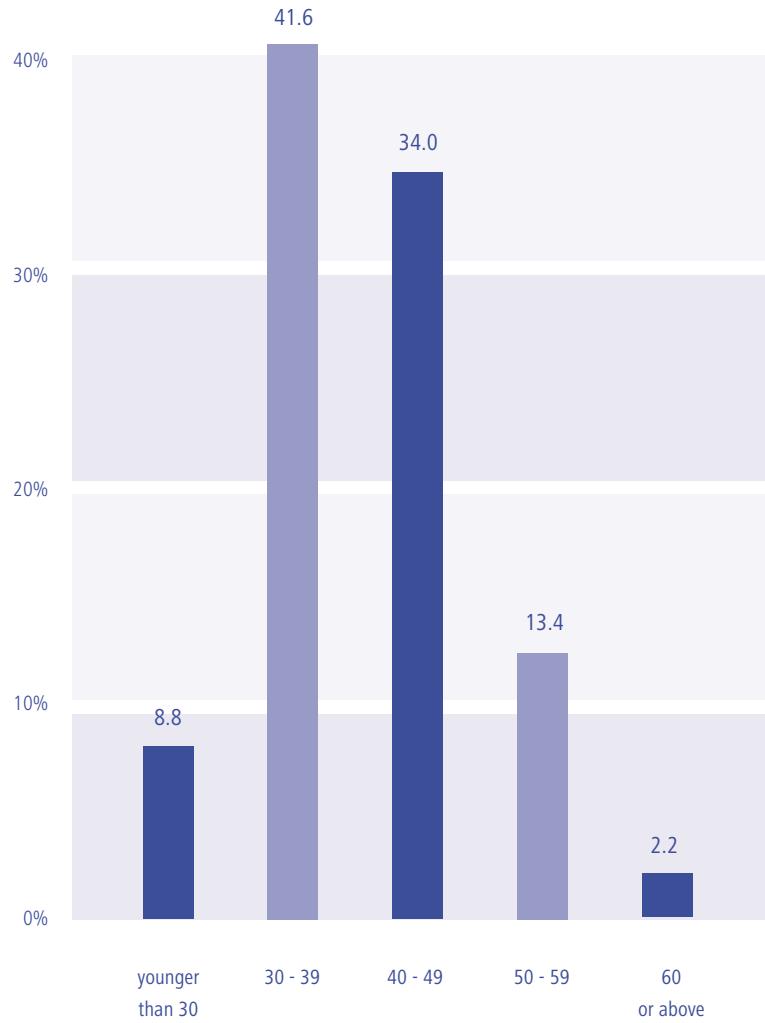


Participants live mainly in Western Europe.

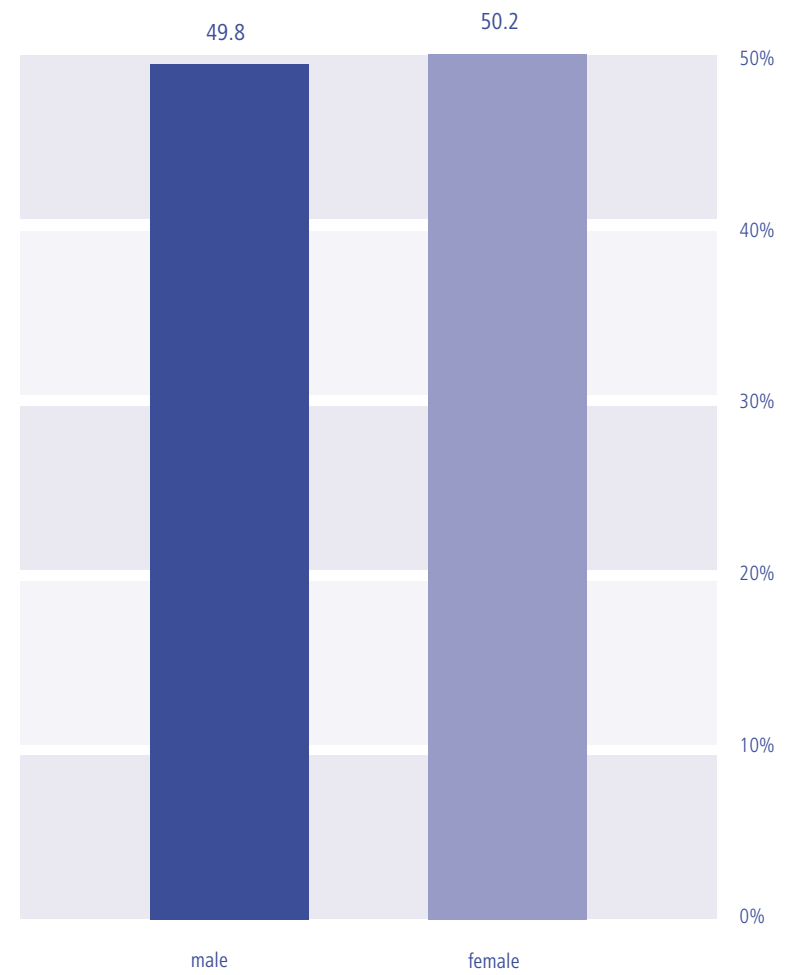
Country of Residence



Participants are mainly between 30 and 50 years old.

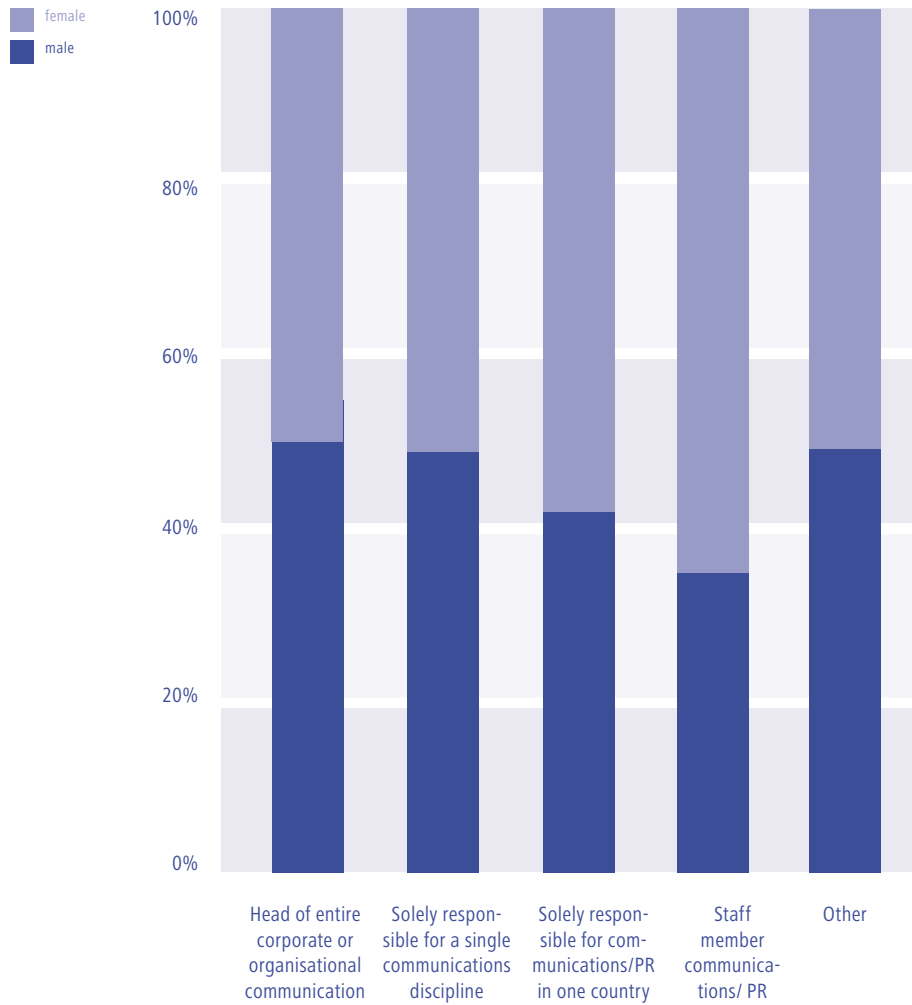


Men and women are equally represented in the field of PR/communications.

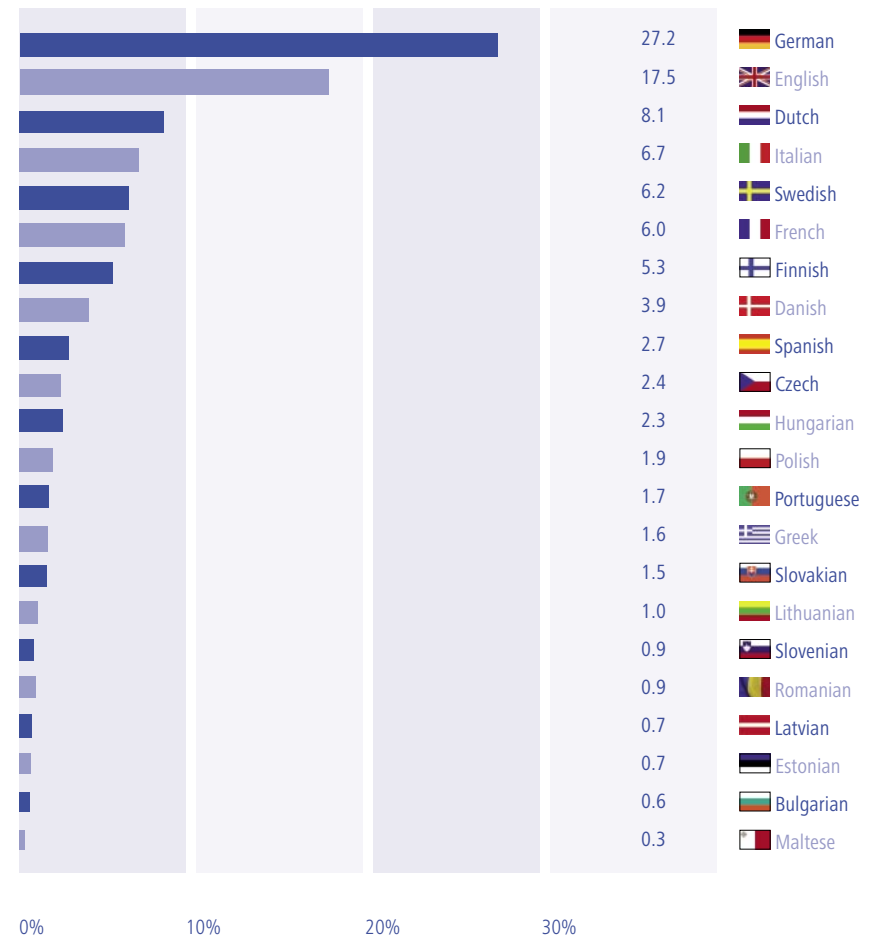


There are no significant gender differences regarding job positions.

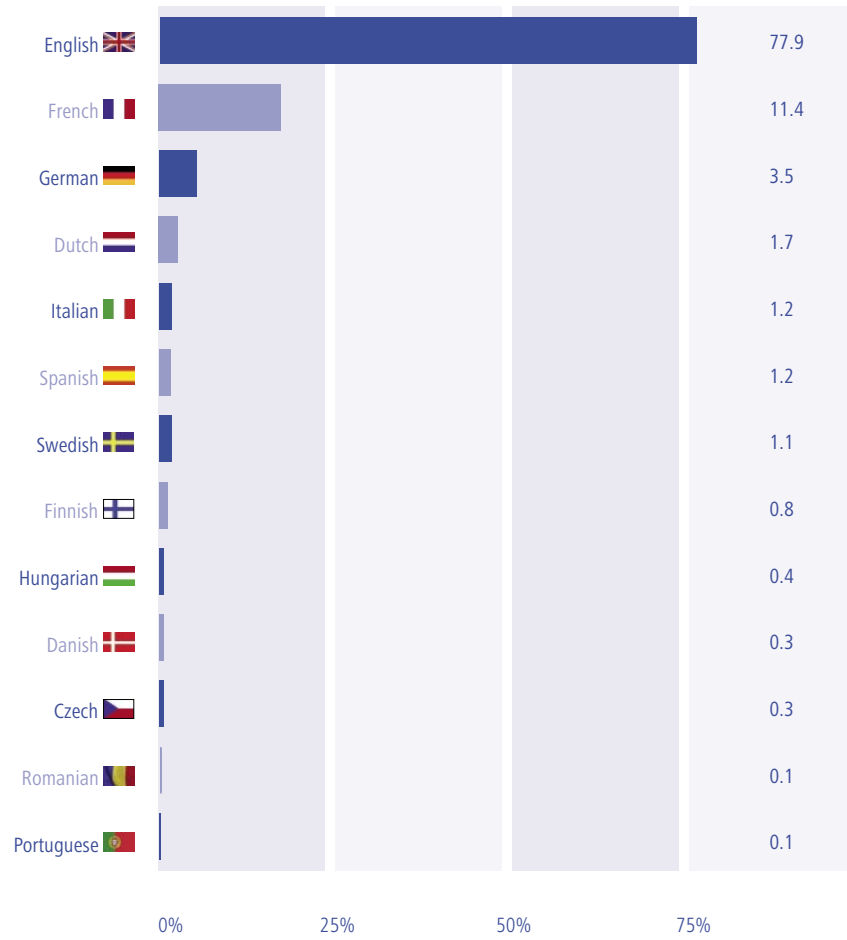
Position within PR/Communications Department



German is the most common first language,...



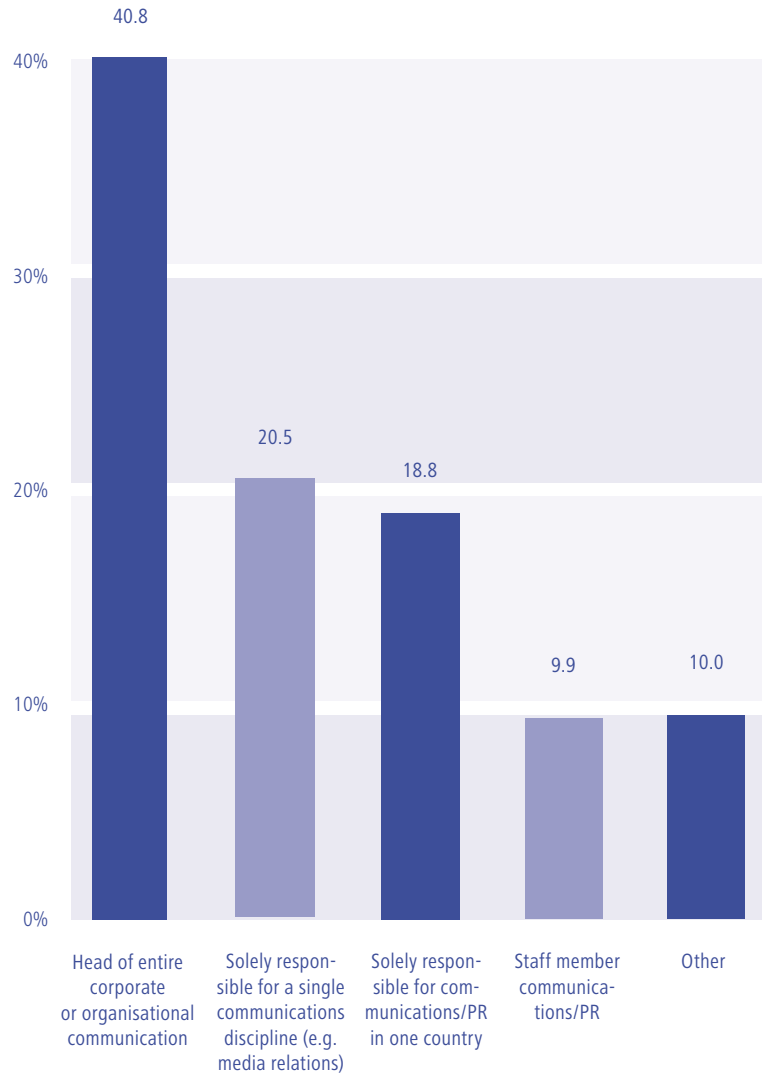
... while English is clearly the dominant second language.



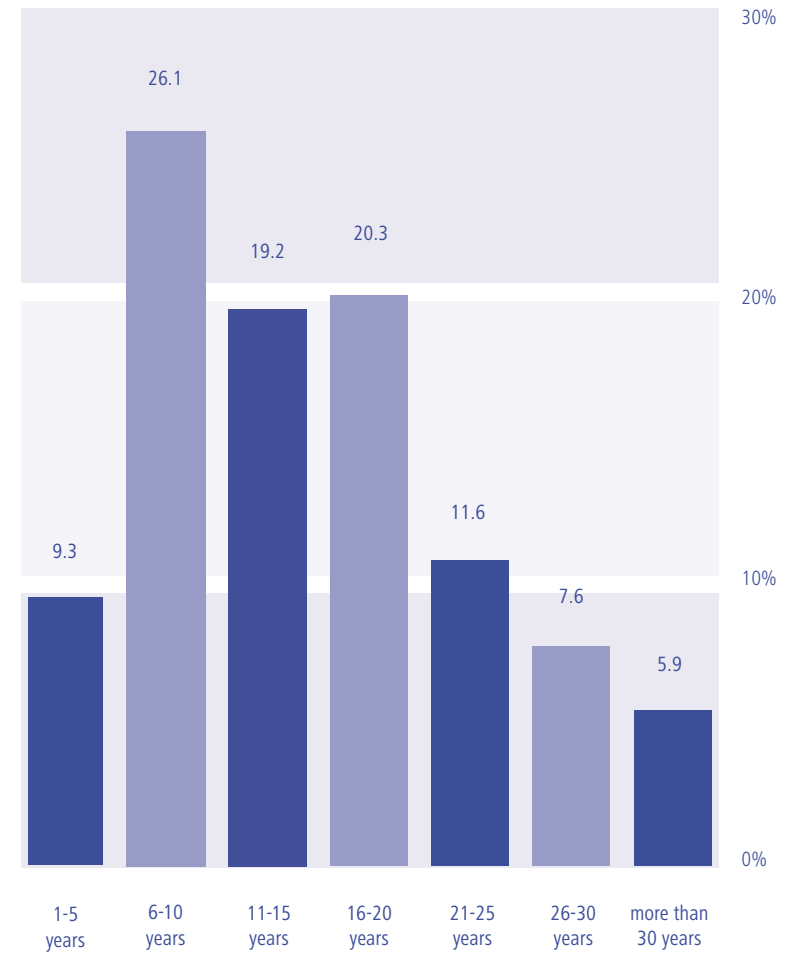
3.

Personal Data – Education and Career

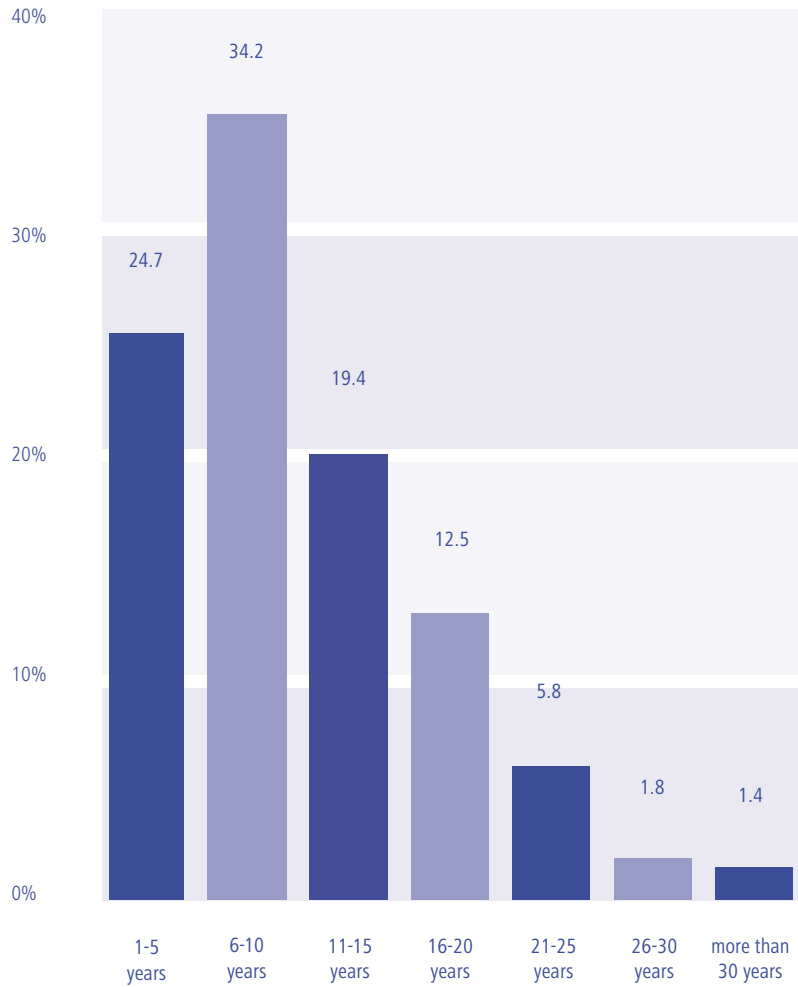
Participants are predominantly responsible for entire organisational communication.



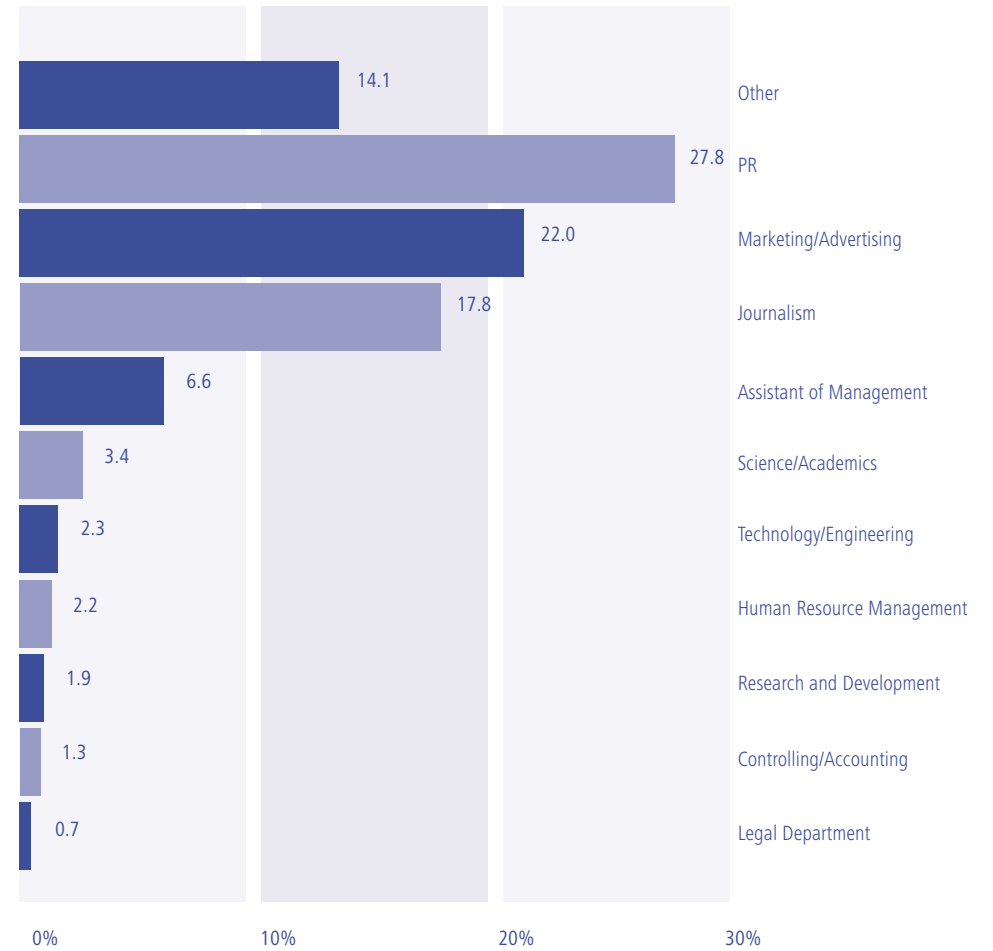
Participants have on average been professionally active for 15 years...



...ten thereof in the field of communications.

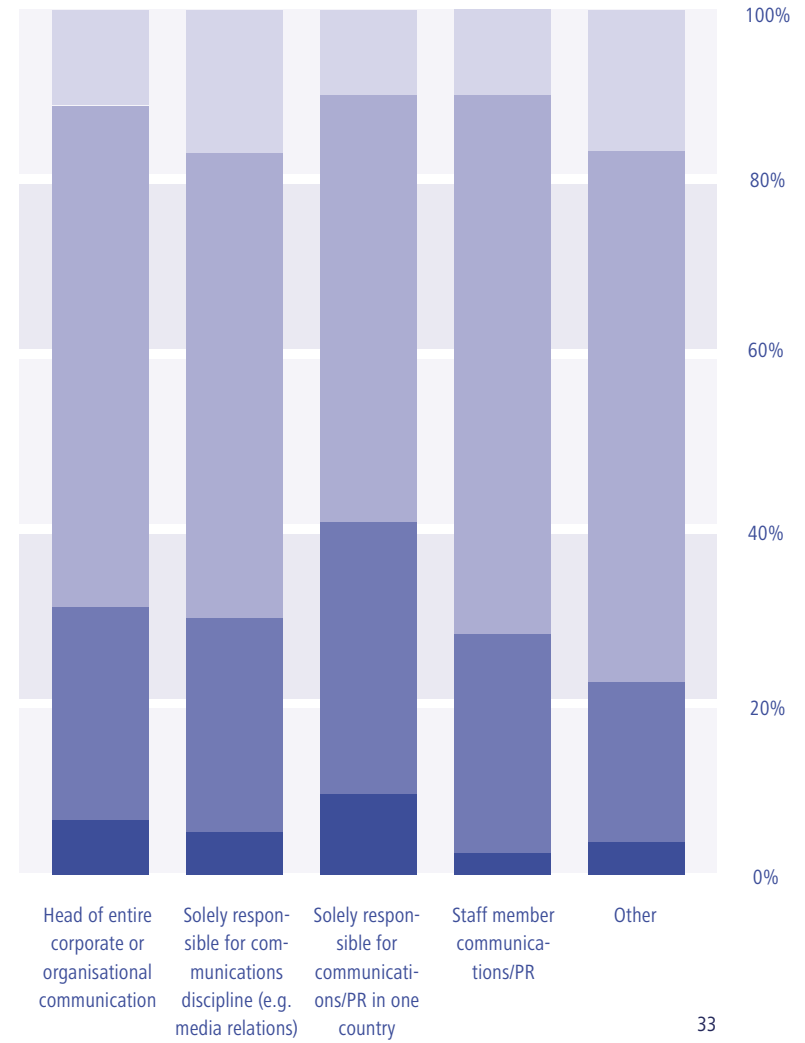
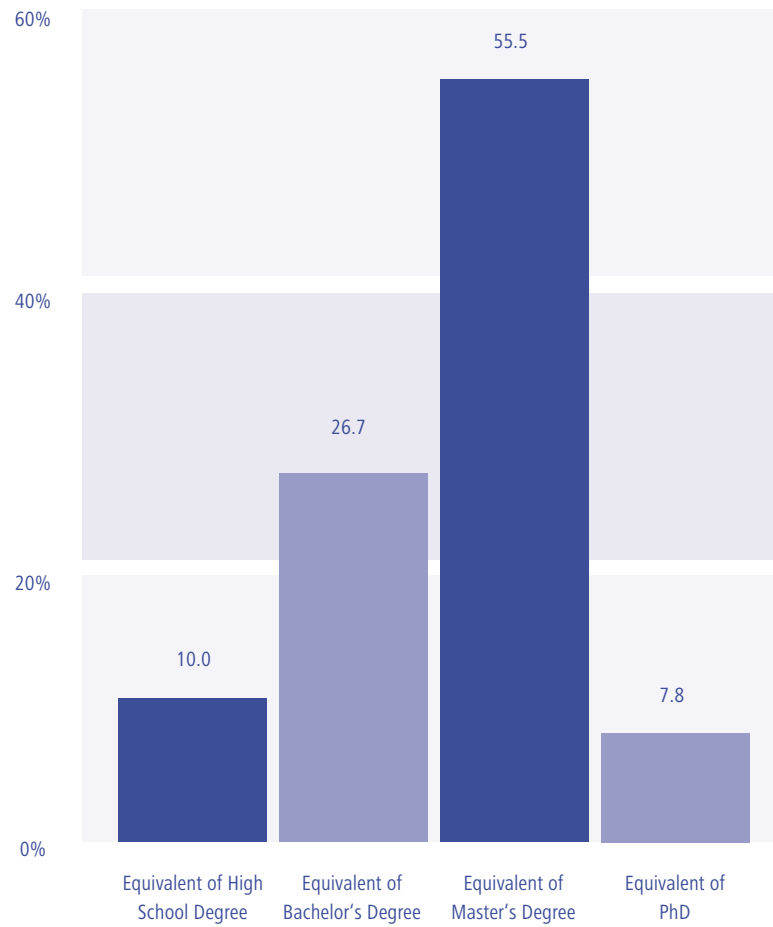


Previous work experiences are predominantly in communication-related fields.

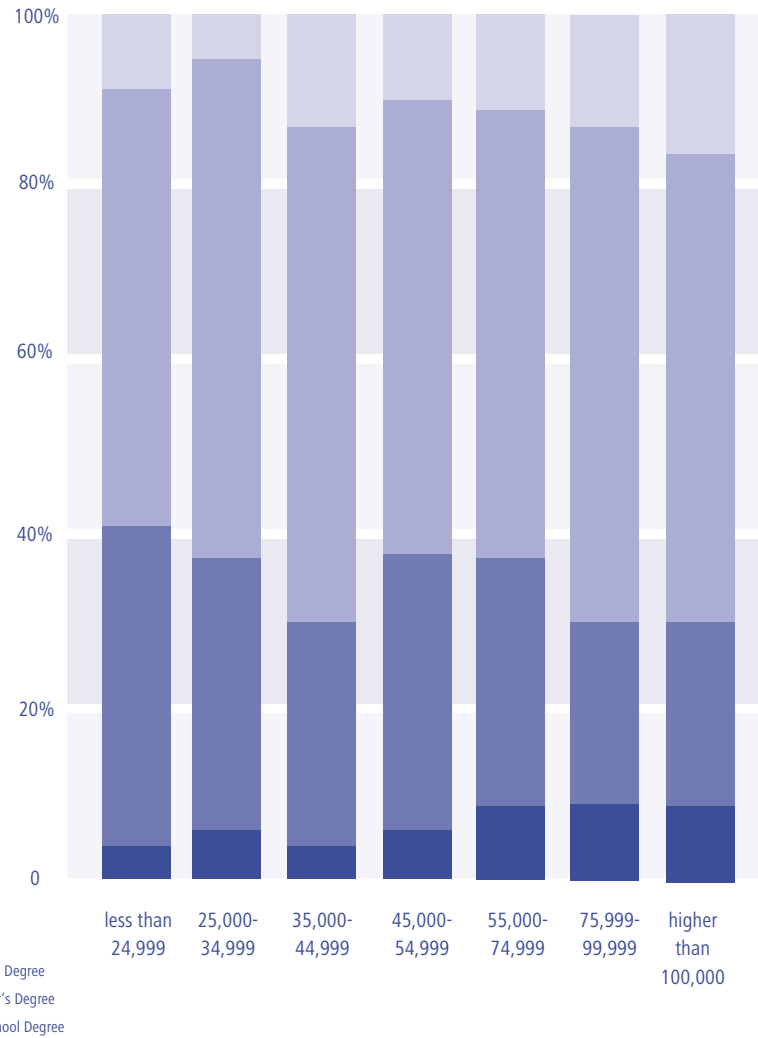


A large majority of participants hold an academic degree.

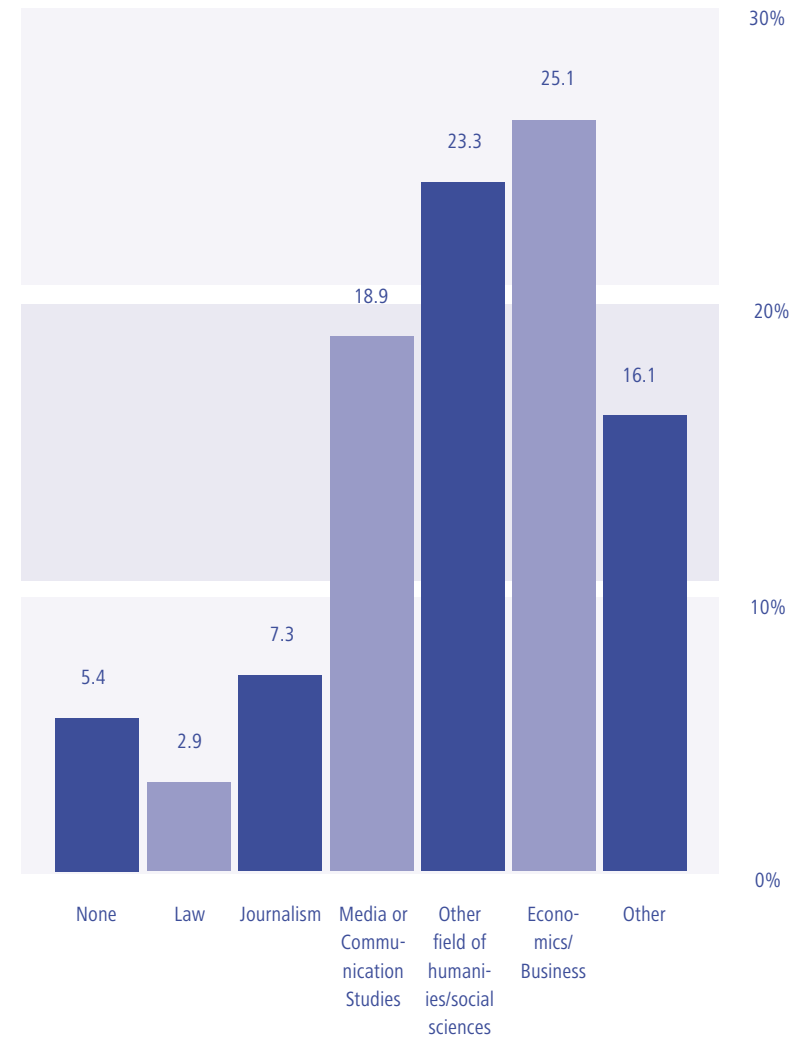
The educational level has no significant impact on job position.



The educational level does only have marginal influence on income level (highest PhD rate within 100,000 plus category).

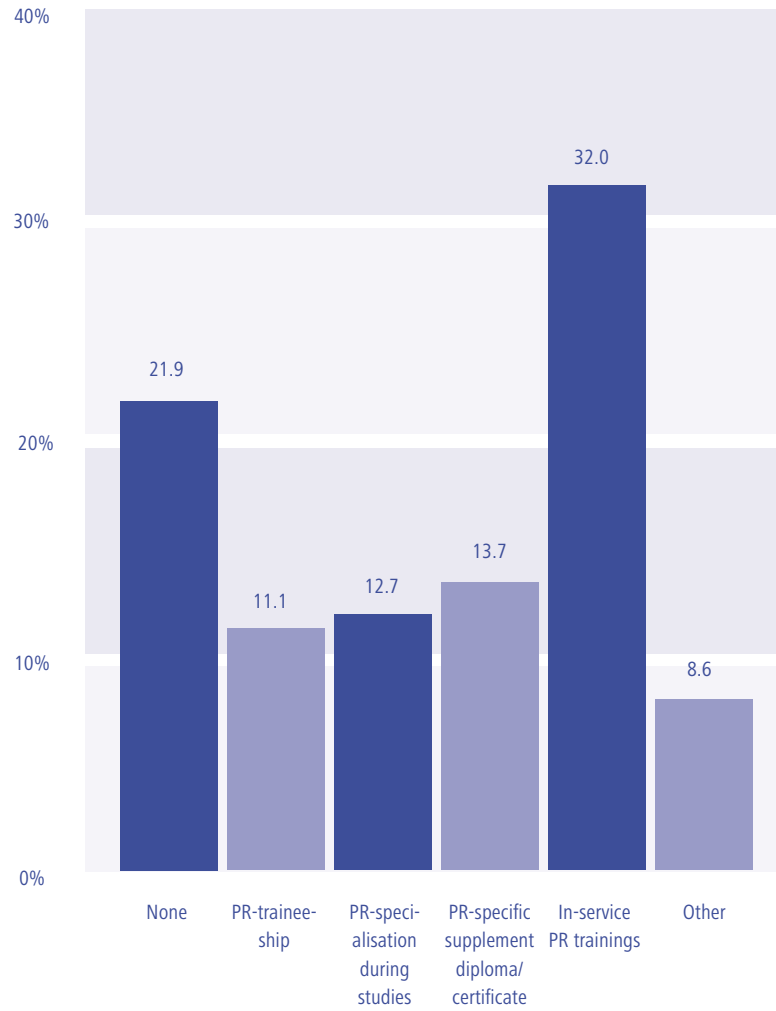


Economics/Business is the most common subject studied by the participants.

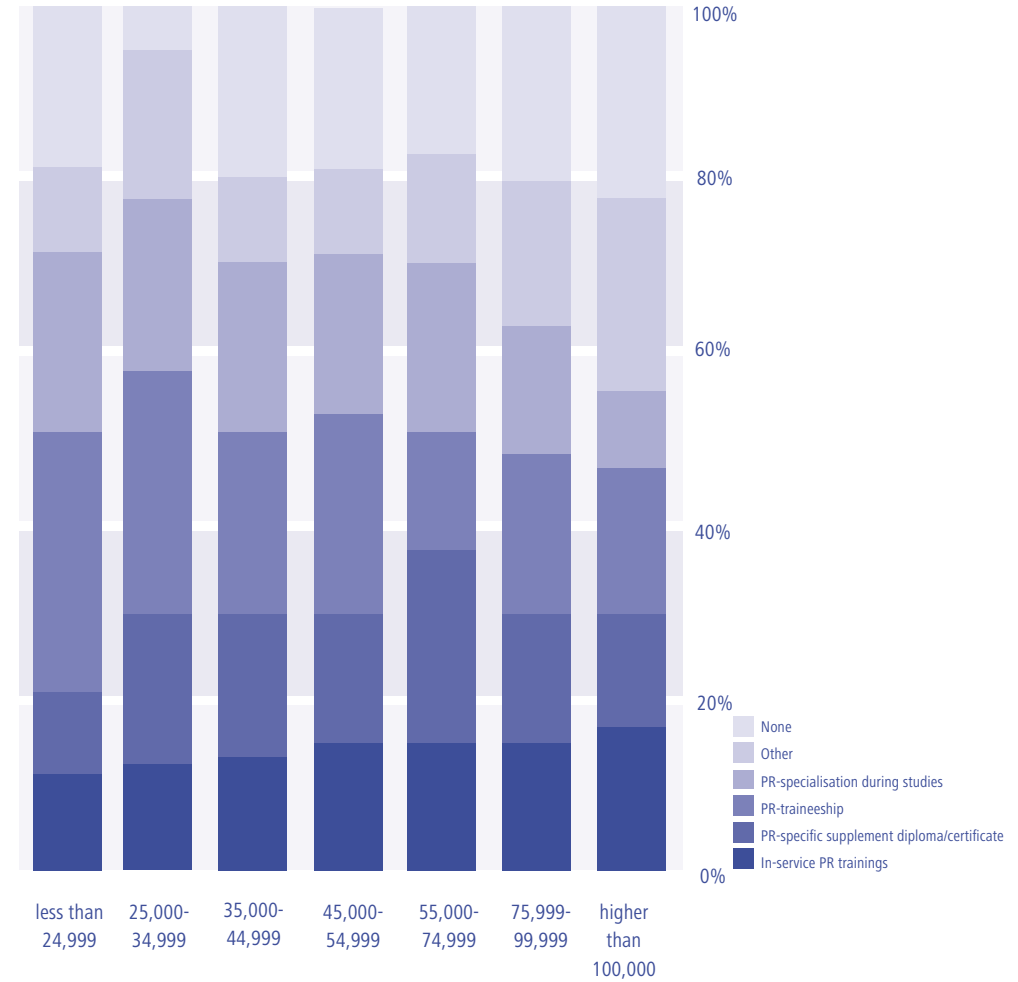


PR-specific trainings are widely accepted by PR-professionals.

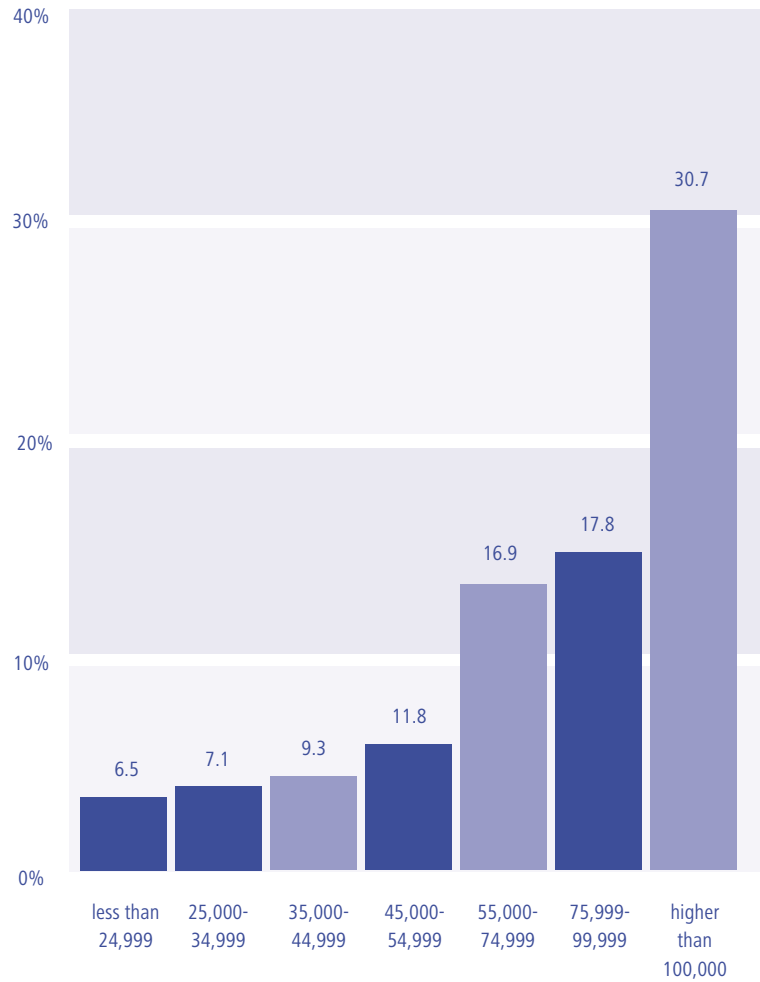
PR-specific training has no clear influence on salary.



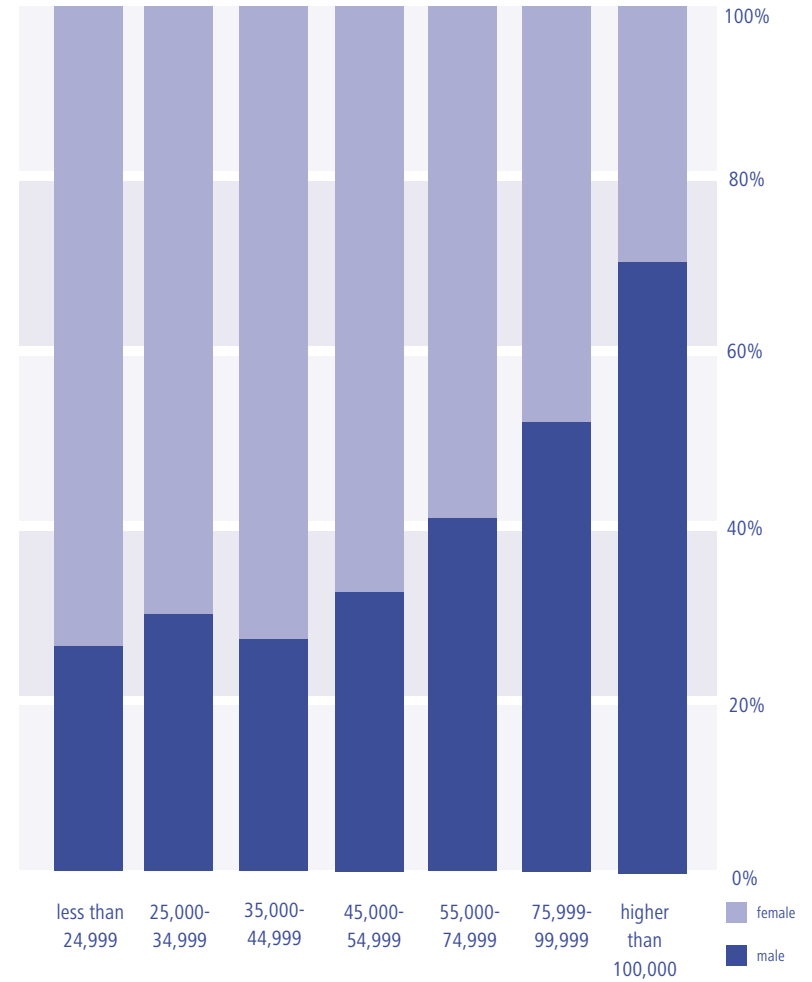
Average yearly income



Income levels prove to be quite differentiated.



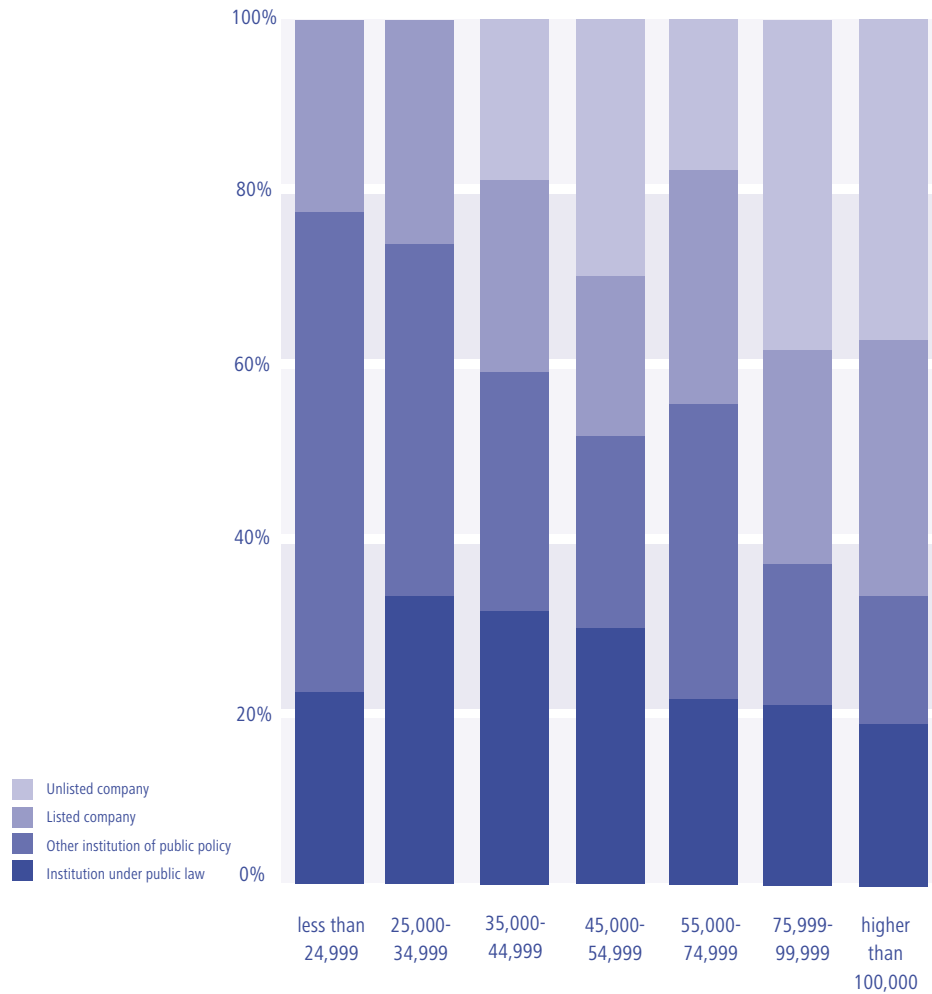
70% of top-earners are men – women tend to gain lower salaries.



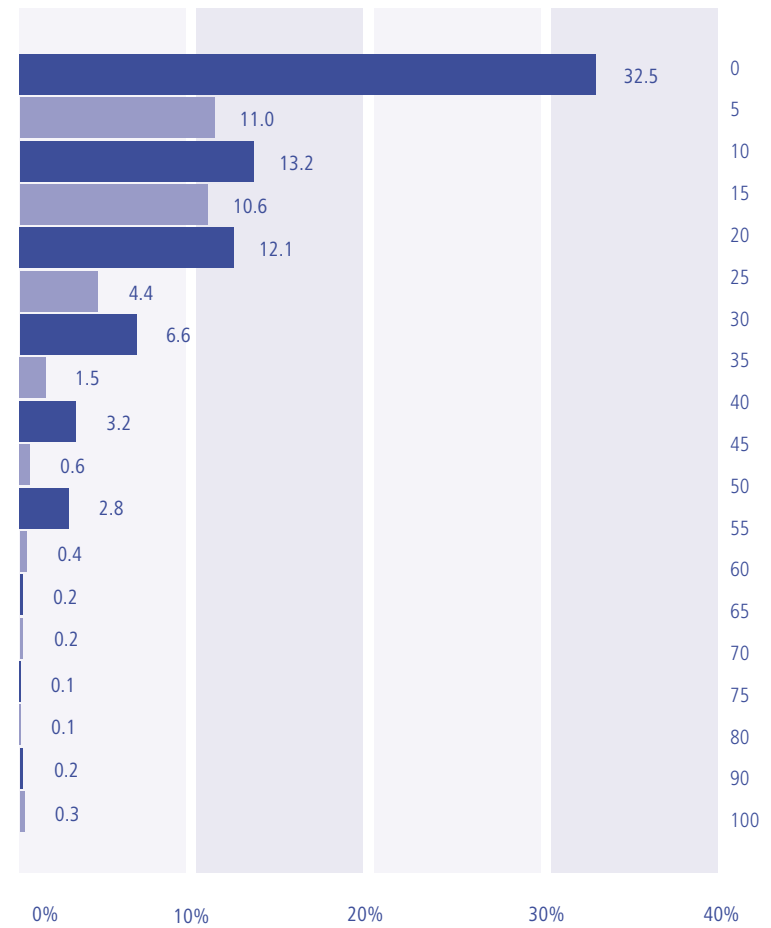
Institutions of public policies tend to pay lower salaries, whereas unlisted companies are in the upper levels.

Income is still largely not profit-related (on average about 14%).

Average yearly income



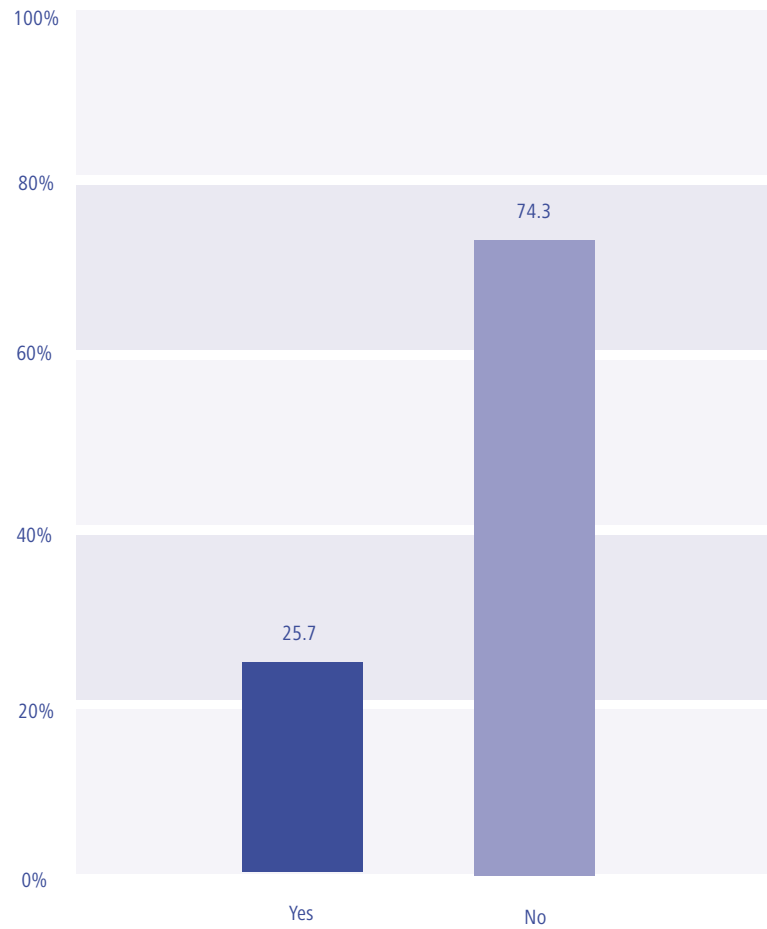
% Profit-related income



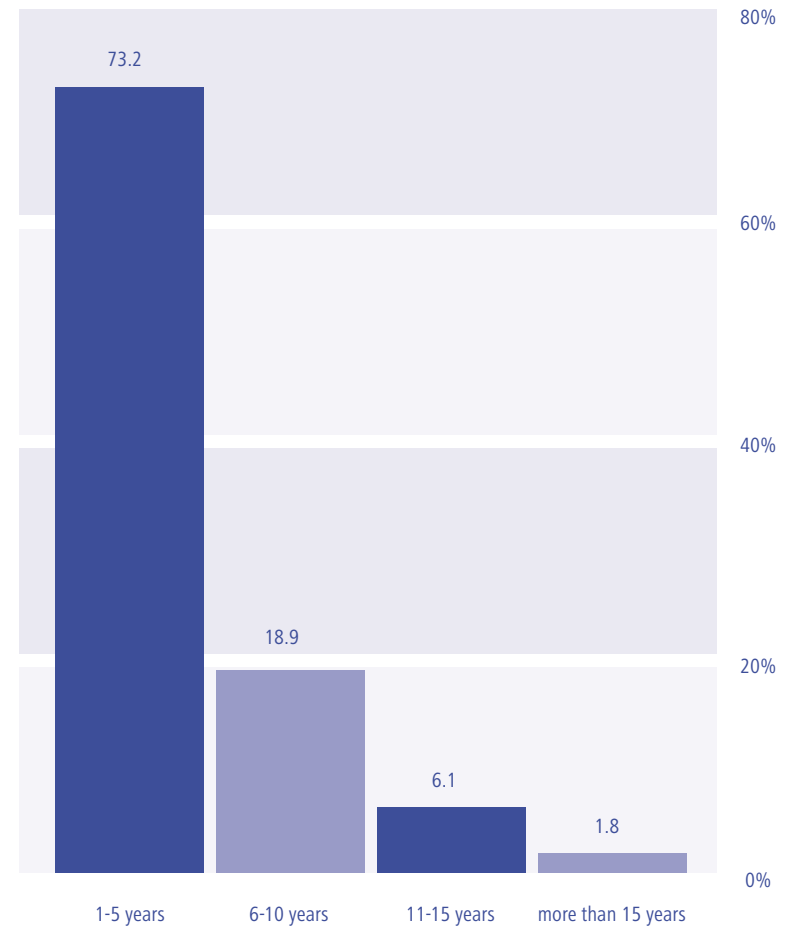
Foreign work experience is still an exception.

If participants have work experience abroad, it is on average limited to 4.5 years.

Work experience abroad



Years of work experience abroad

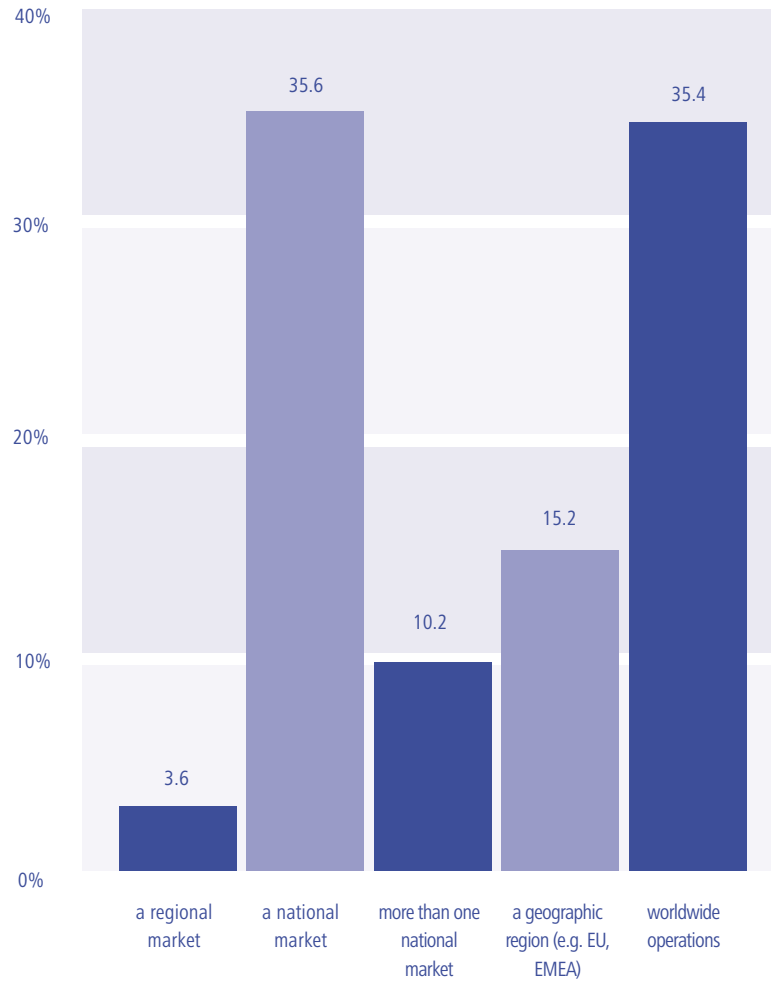


4.

Organisational Communication –
Structures and Organisational
Integration

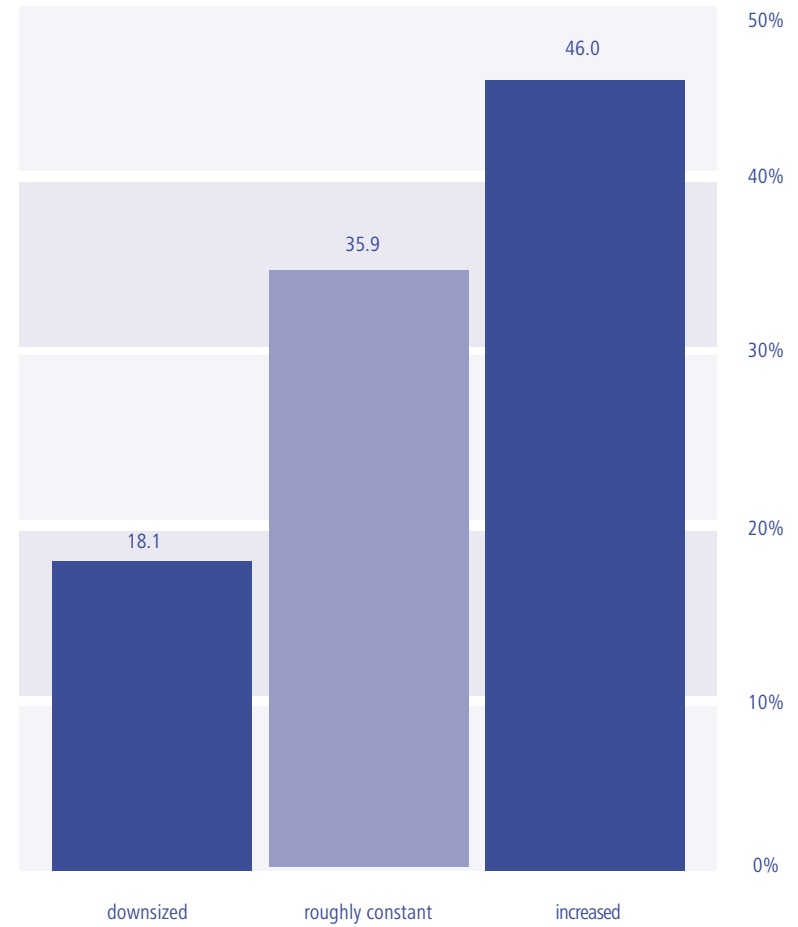
Communications departments with regional responsibilities are still an exception.

Department responsible for the communication efforts of



PR/communications departments have grown in the past.

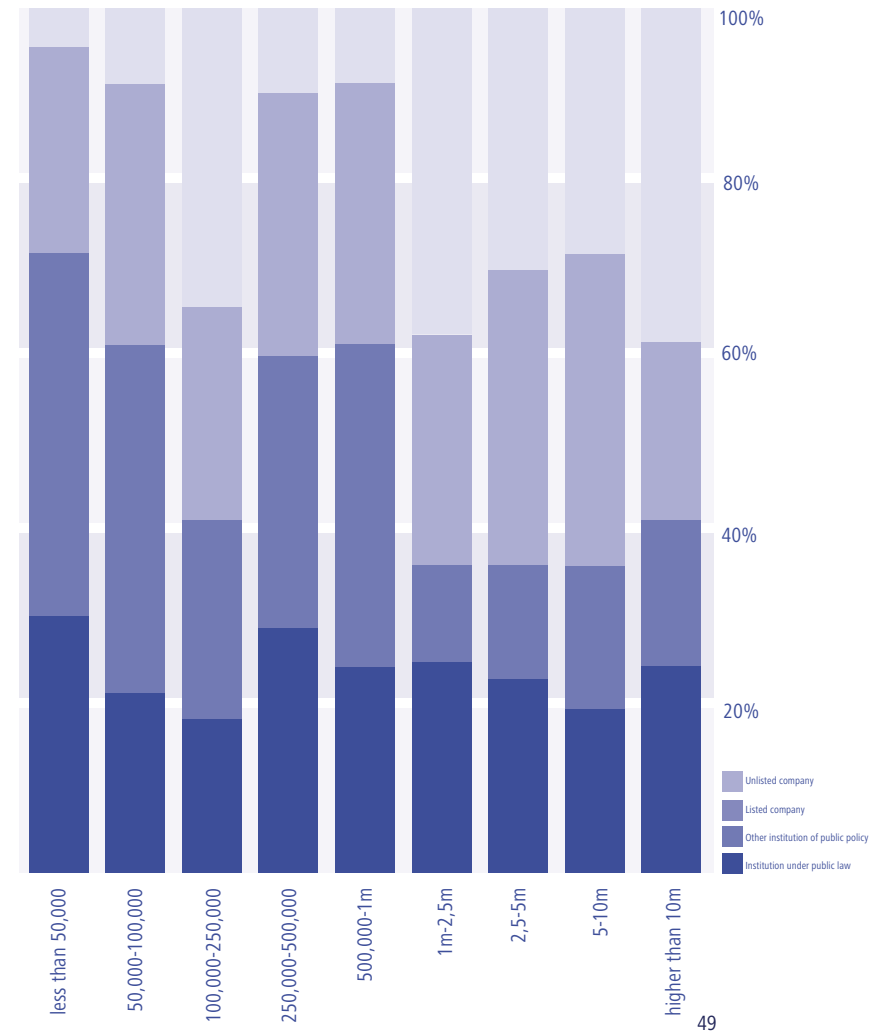
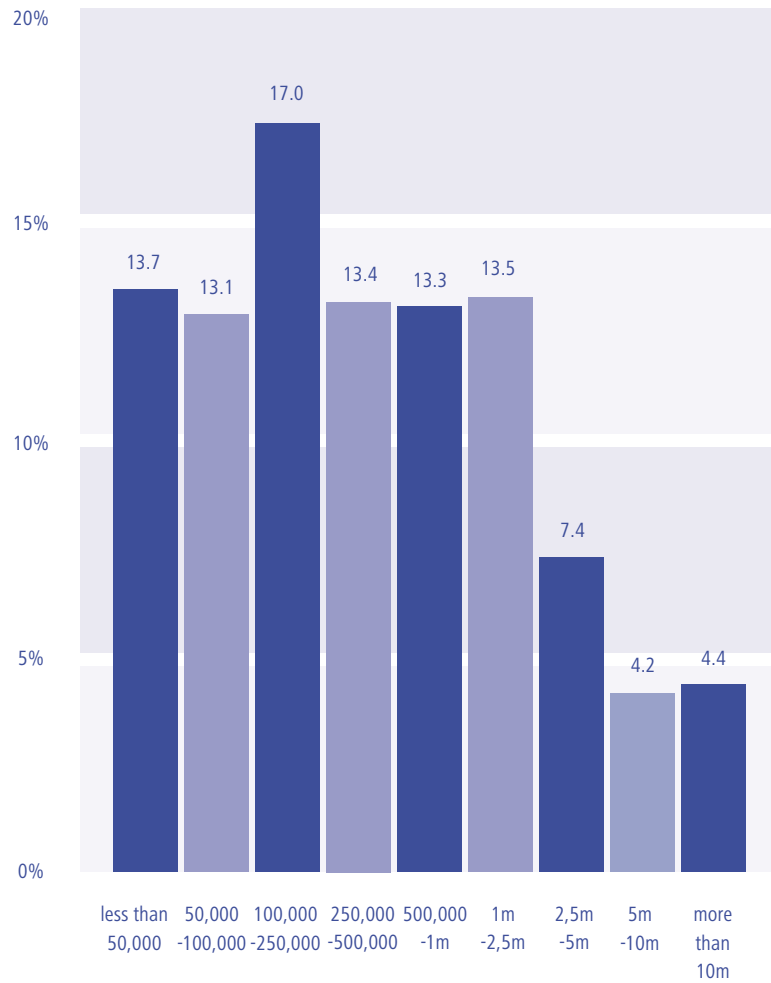
Development of department size



The average size of PR/communications budget is approximately 250,000 to 500,000 Euro.

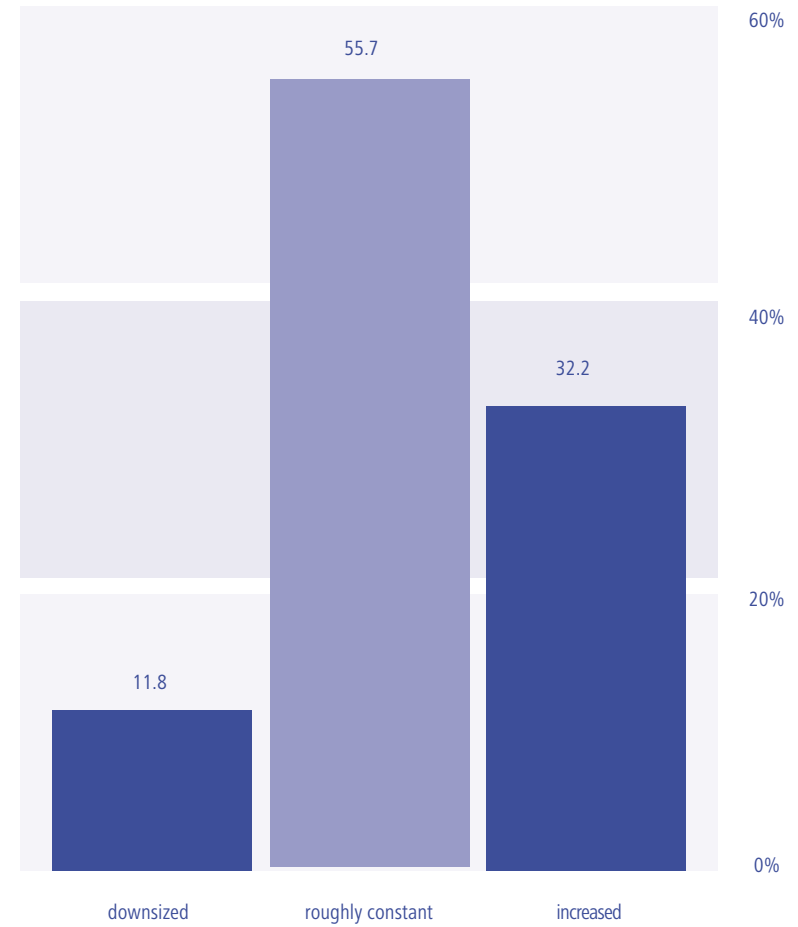
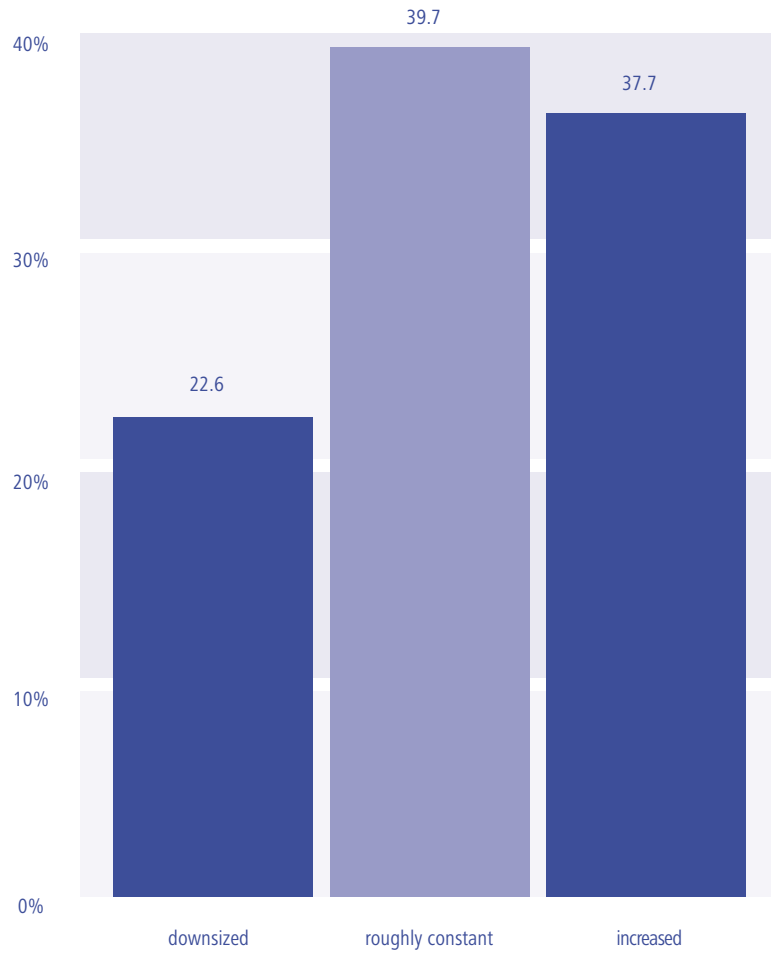
Institutions of public policy tend to have smaller PR budgets in contrast to unlisted companies

What is the approximate size of your PR/communications departments' budget



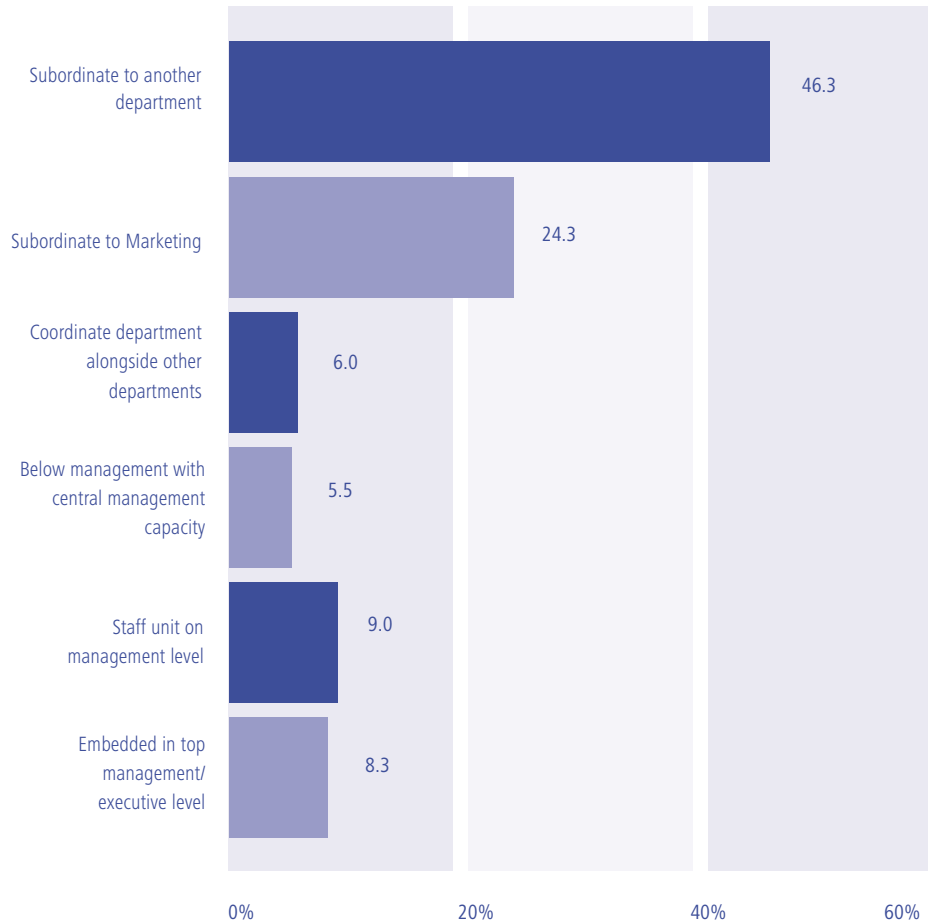
In the past 5 years, budget increases outweighed decreases.

Further moderate increases are expected for the future.



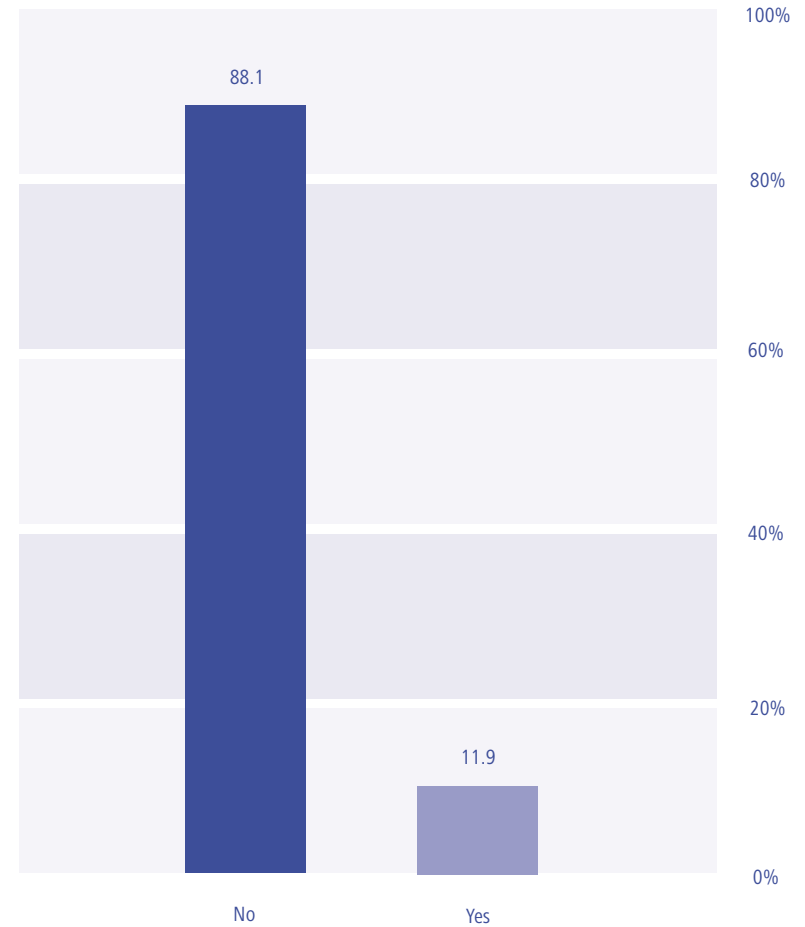
Communication has been established as a critical element of organisational leadership/management.

Hierarchical level of the PR/communications department



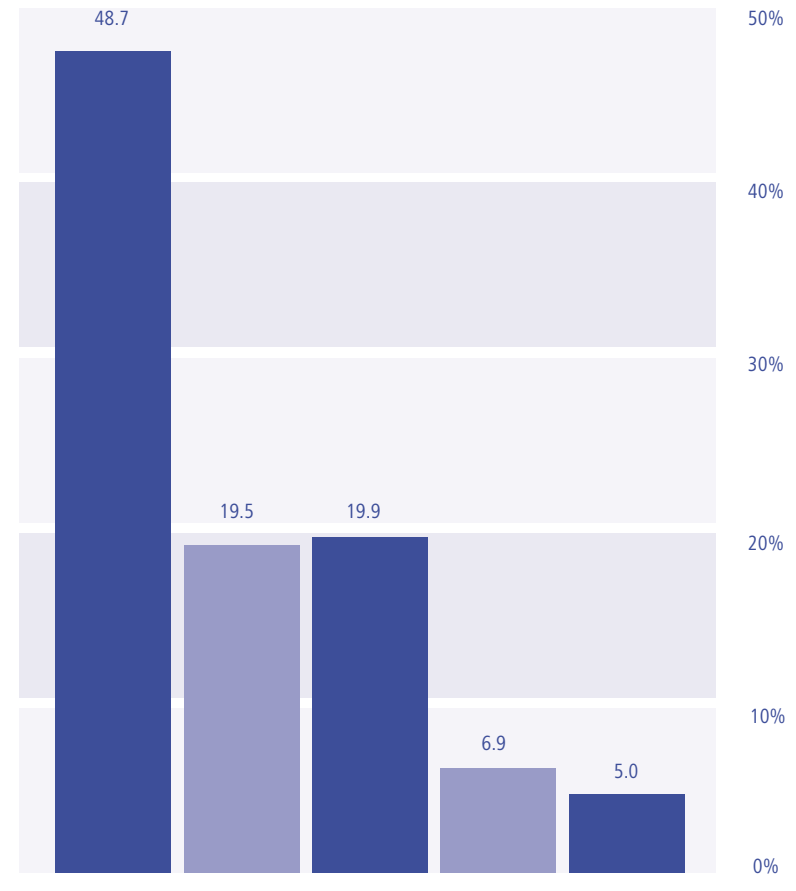
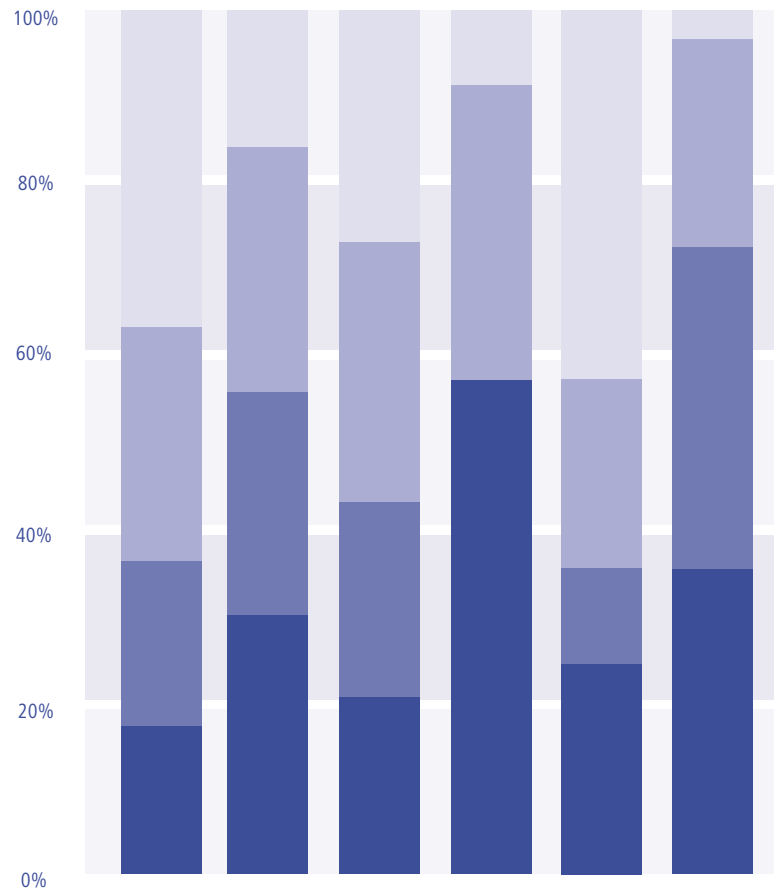
Integrated Communication still proves to be fashionable.

Integrated Communication strategic element of organisation



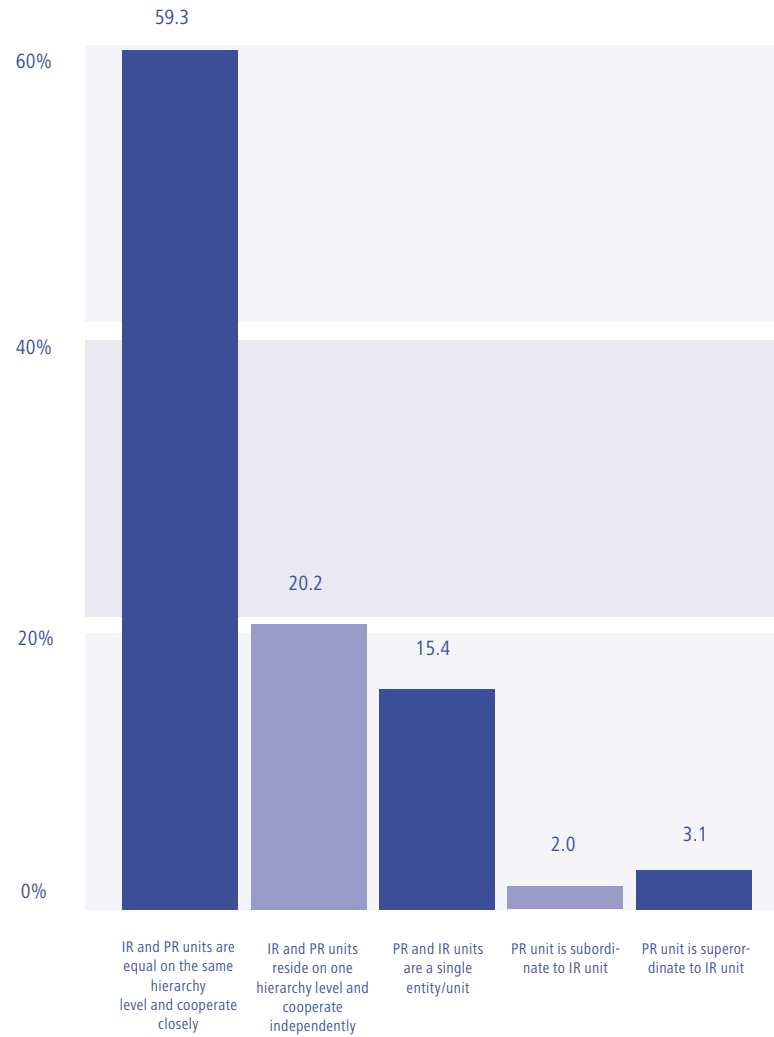
Within institutions under public law approximately 60% of the PR units are subordinate to internal communication unit.

PR and Marketing cooperate closely.

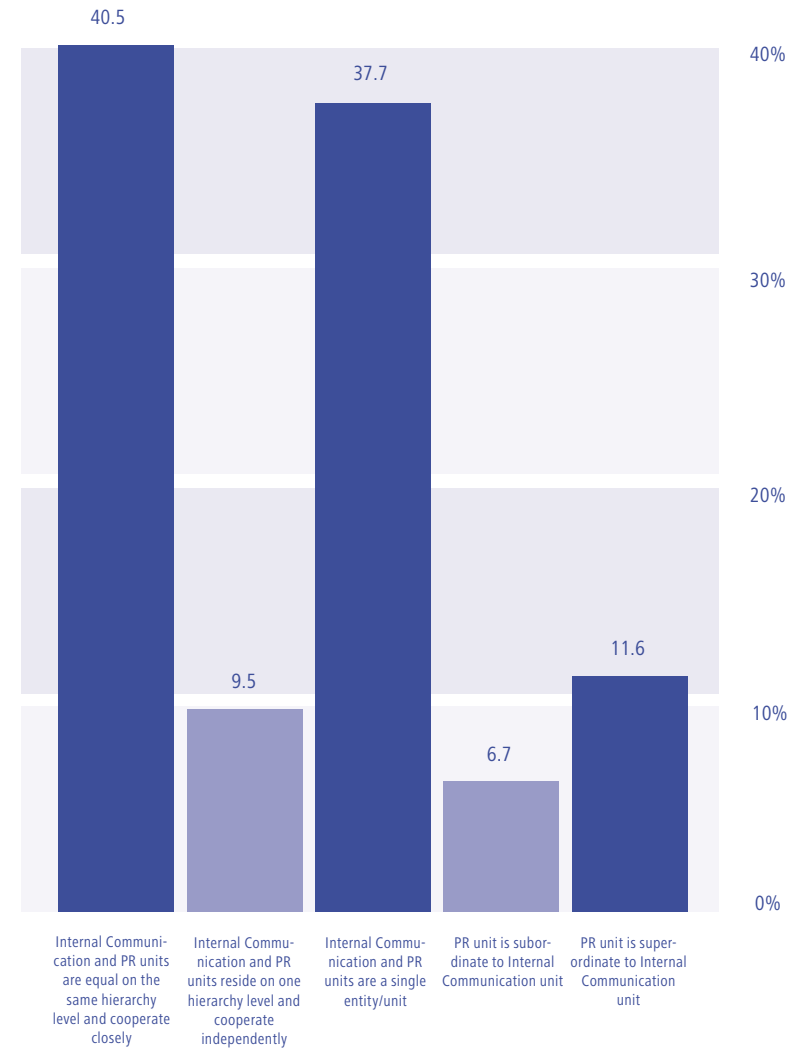


Unlisted company
Listed company
Other institution of public policy
Institution under public law

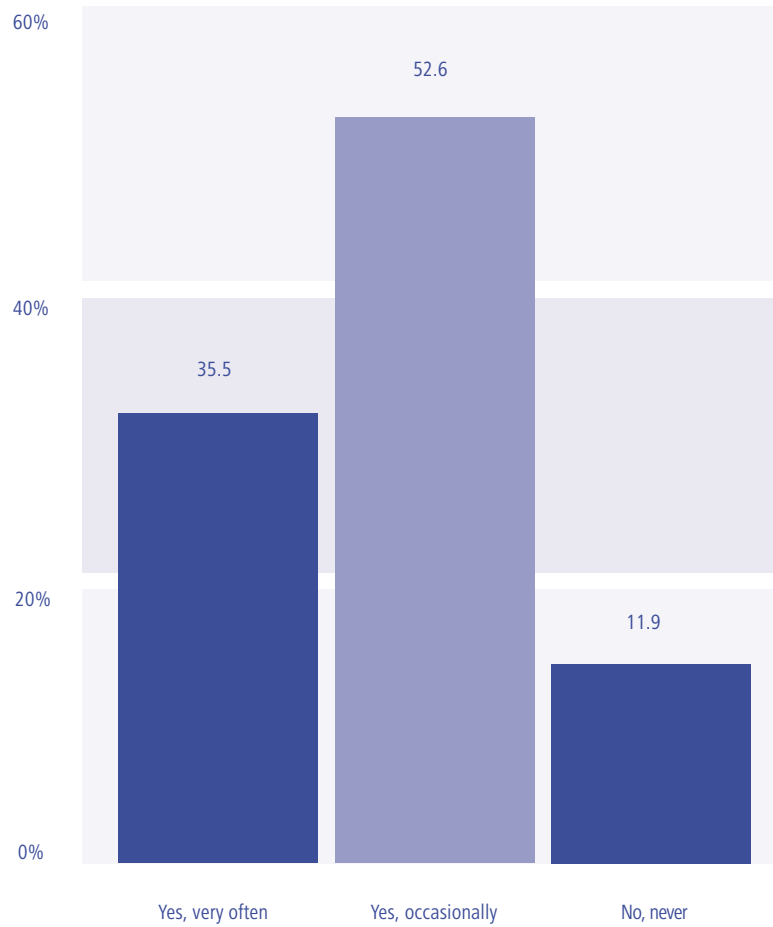
PR and IR are usually separate units.



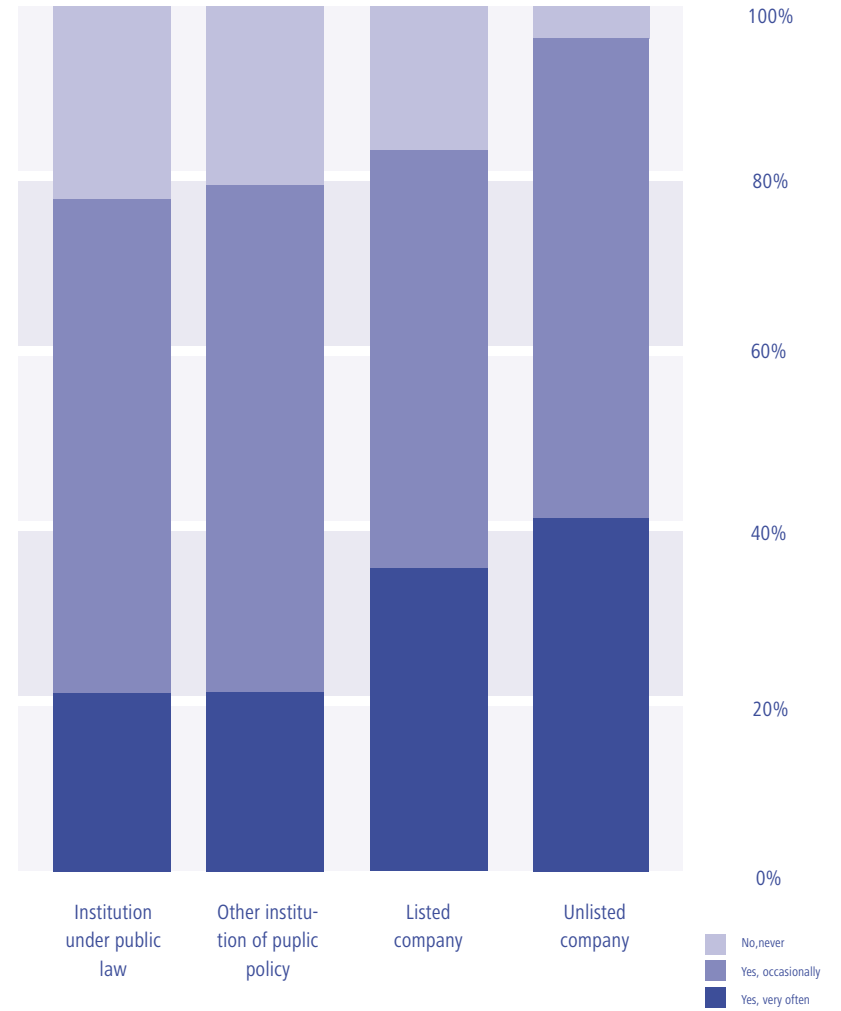
PR and Internal Communication show the highest level of integration.



Cooperation with external consultants is part of daily operations.



While cooperation with external consultants is overall high, unlisted companies work more often with consultants.

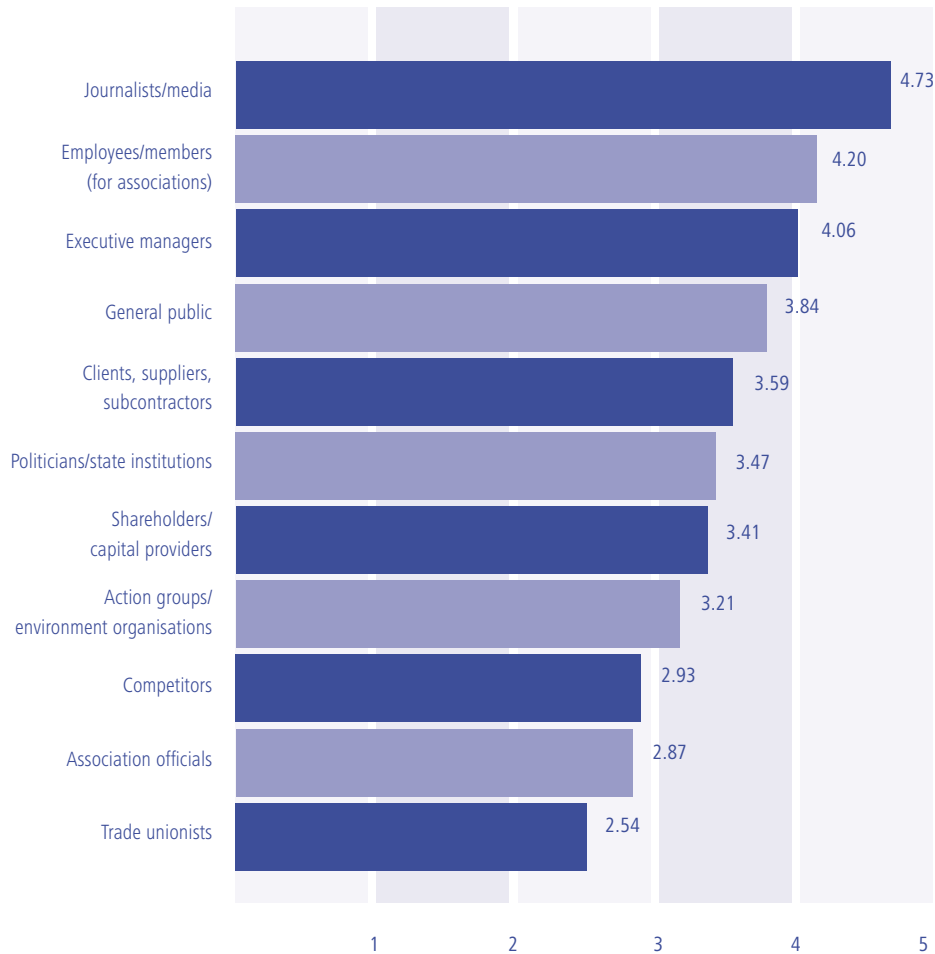


5.

Tasks and Routines, Basics

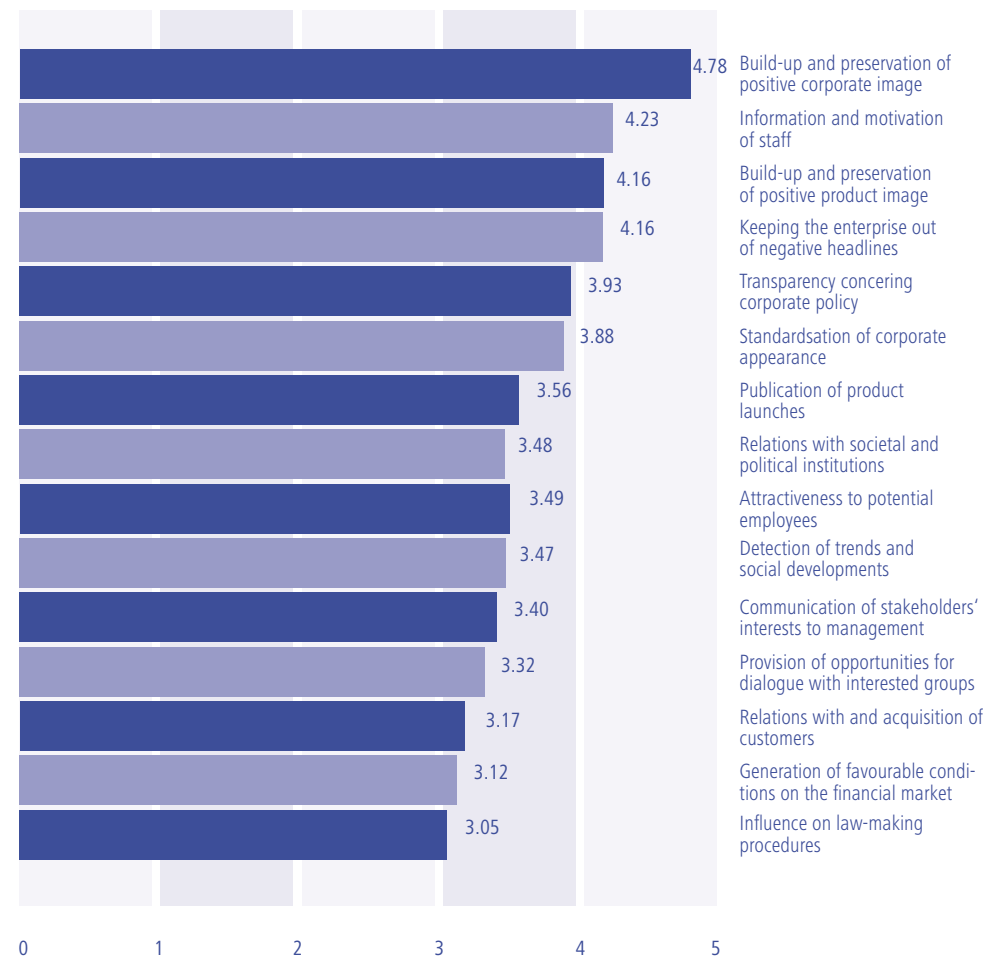
Journalists/media are the most important stakeholder group of communication professionals.

Relevance of stakeholder groups



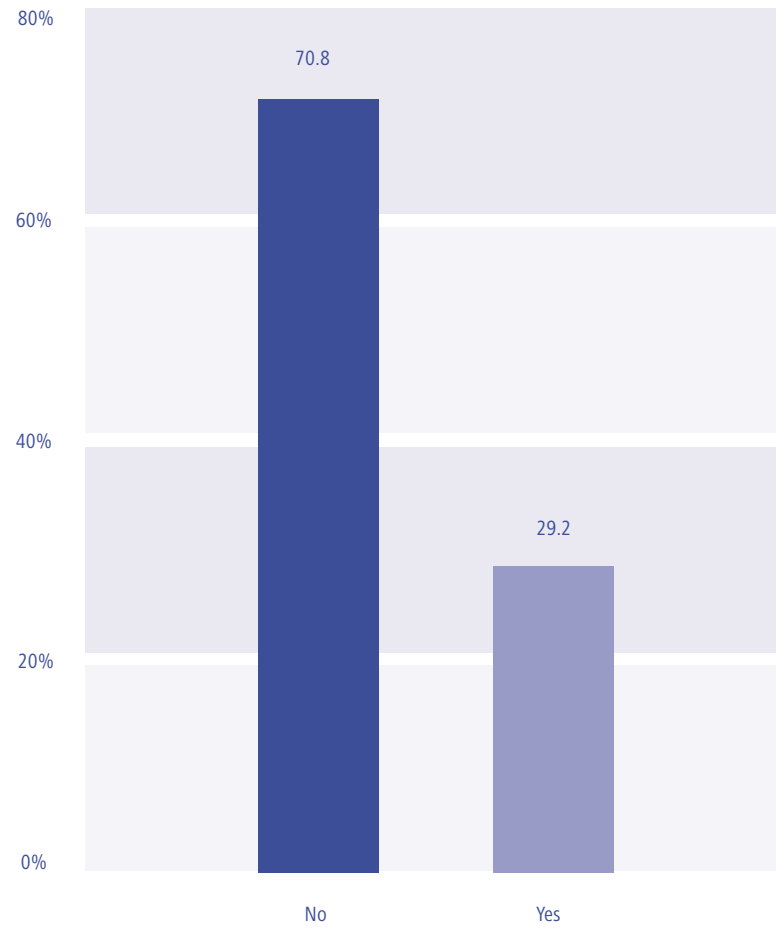
Communication professionals strive to cultivate their organisation's image.

Most relevant objectives



The definition of relevant stakeholders and strategic objectives should influence success measurement.

Systematic success measurement

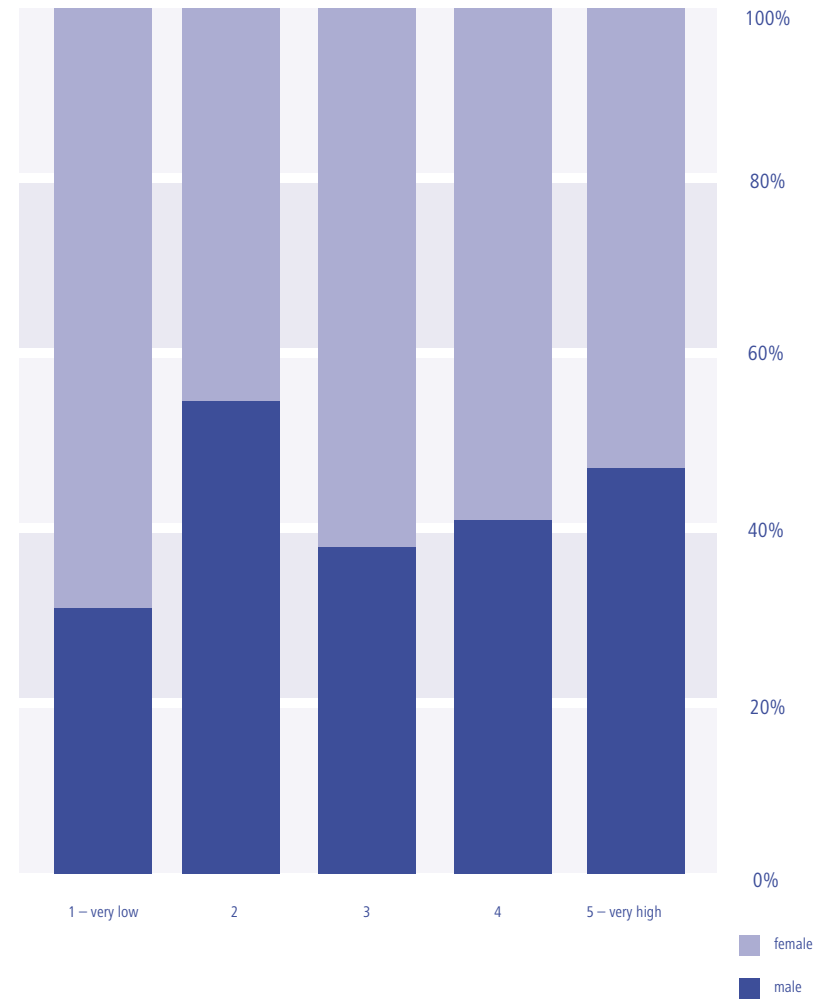
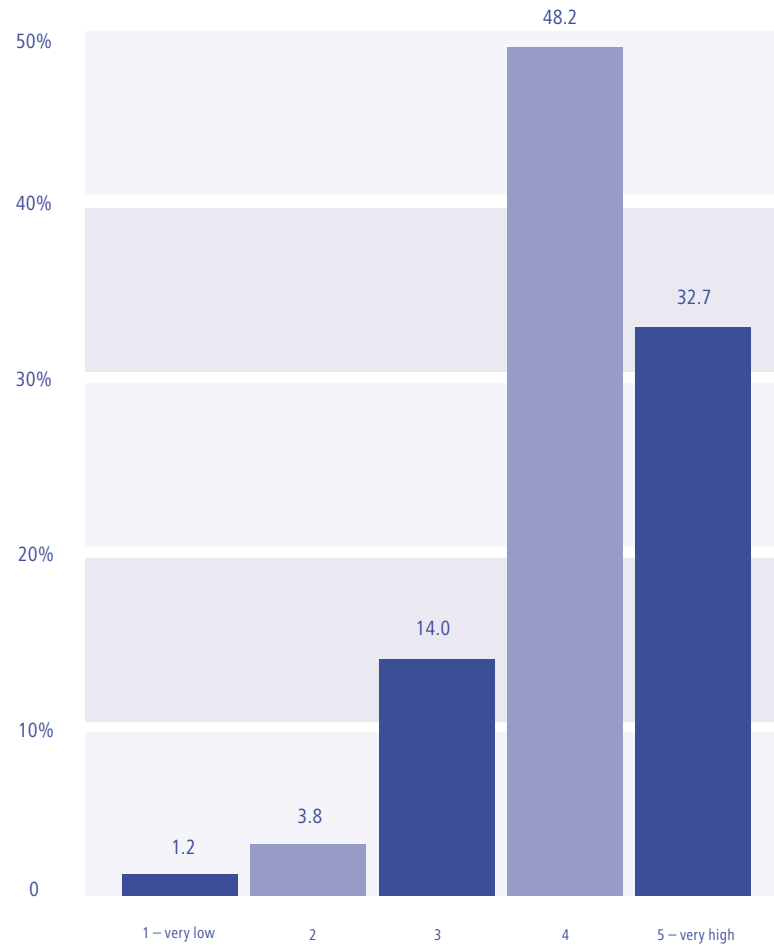


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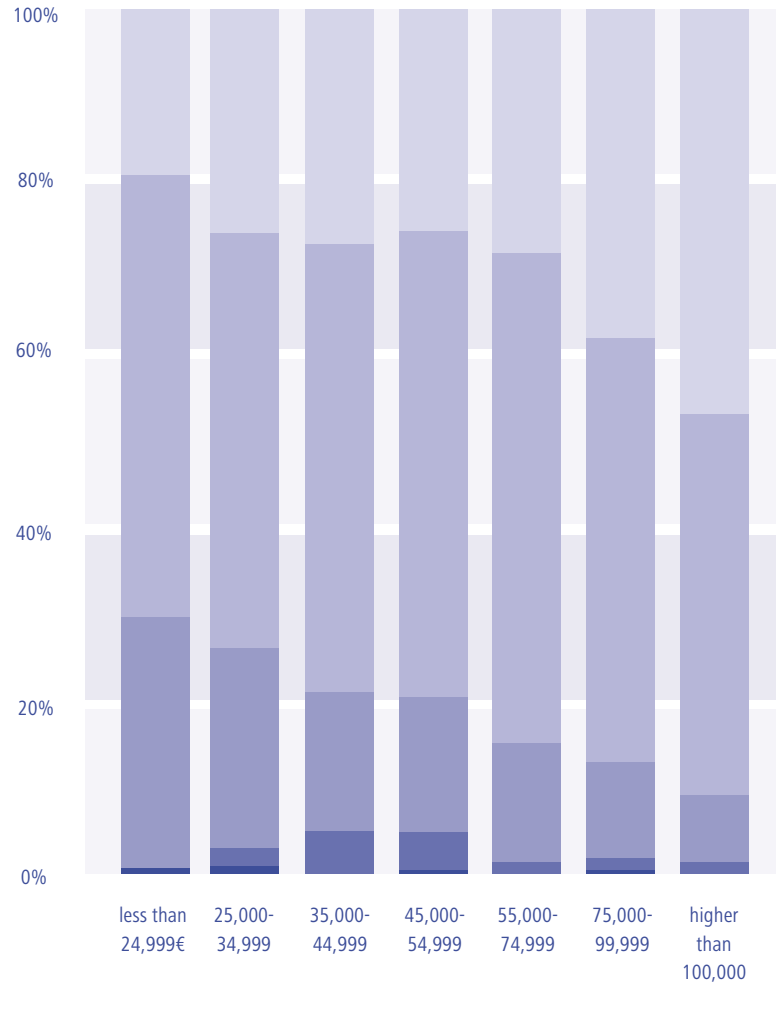
Job Satisfaction

Overall job satisfaction is very high among communication professionals.

No major gender differences regarding job satisfaction

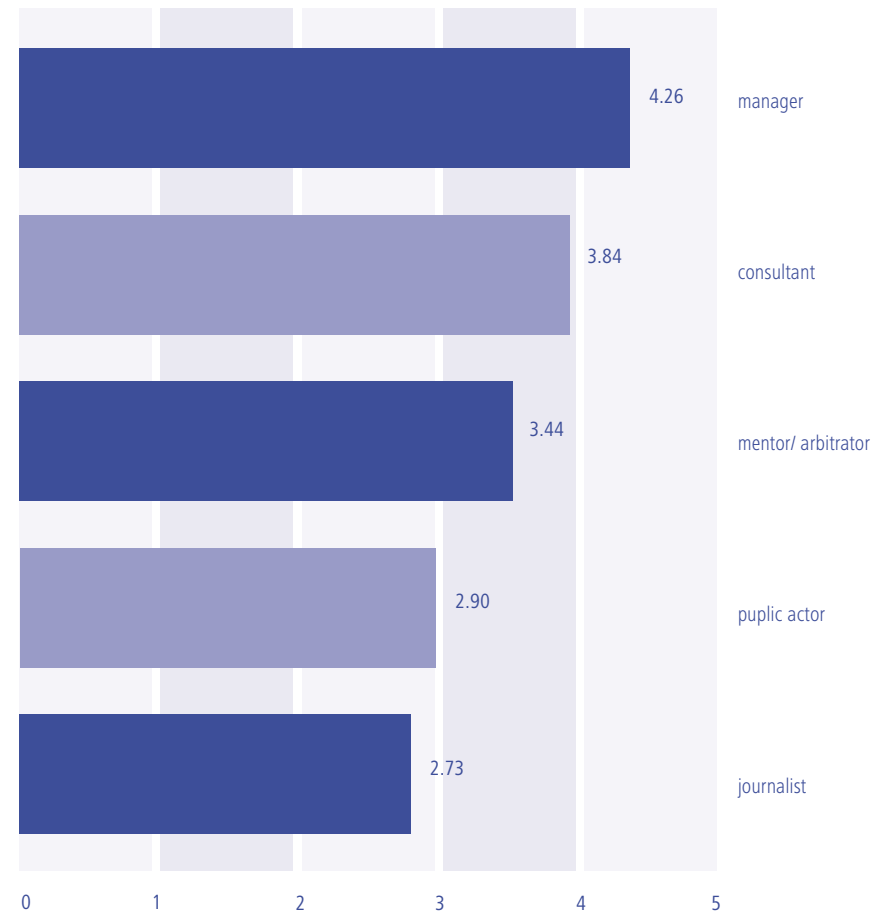


Whereas job satisfaction is overall high, employees with higher salaries rate their job satisfaction higher.

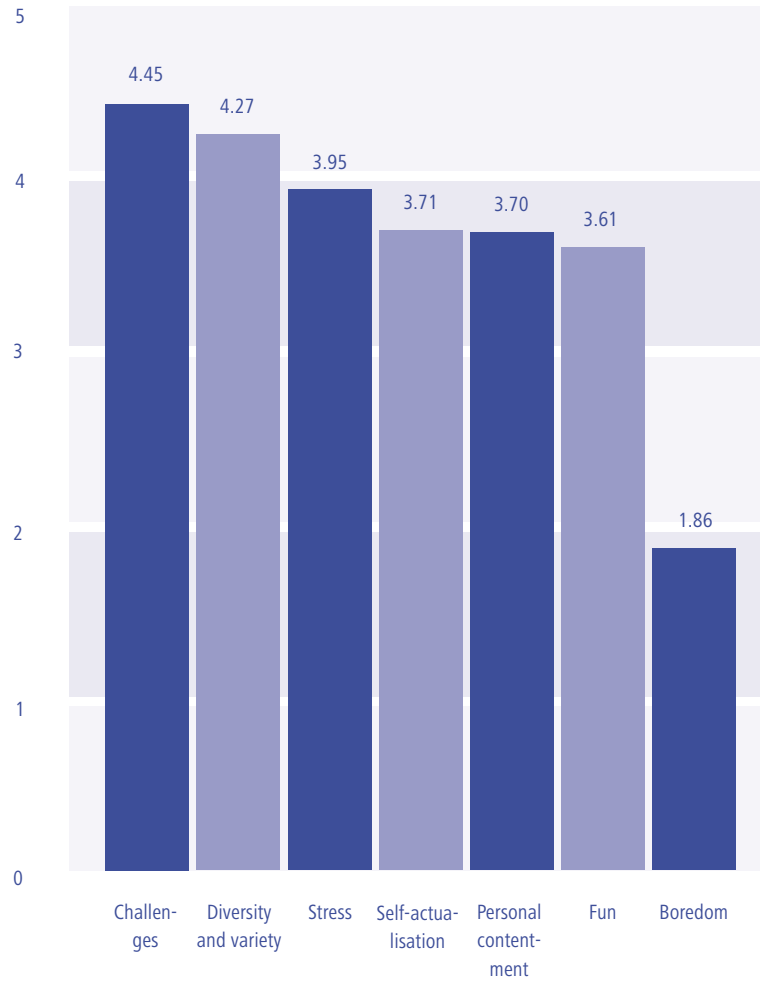


Communication professionals perceive themselves mainly as managers.

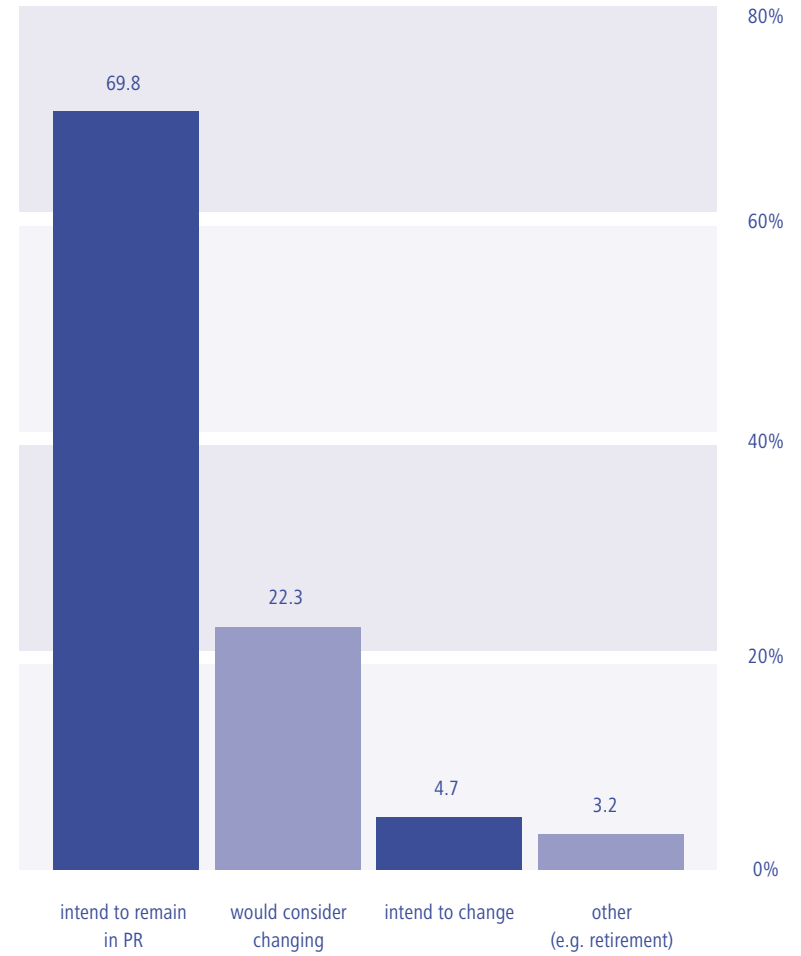
Self-perceived role



Communication professionals perceive their jobs as challenging and varied.



Participants expect to remain active in the field of communications.

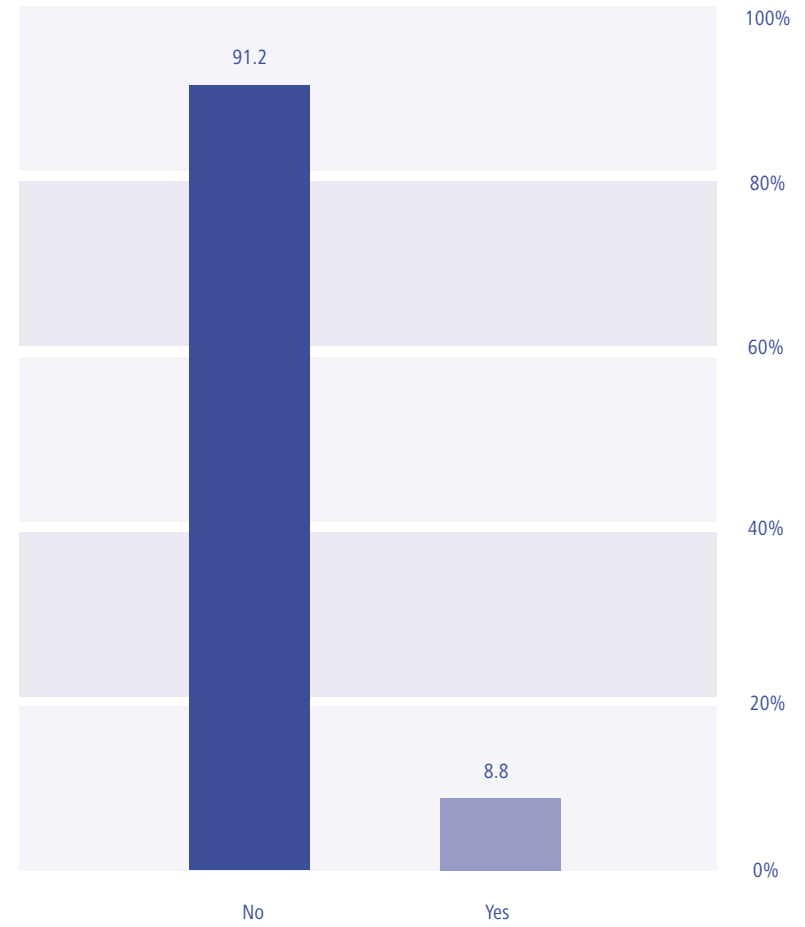
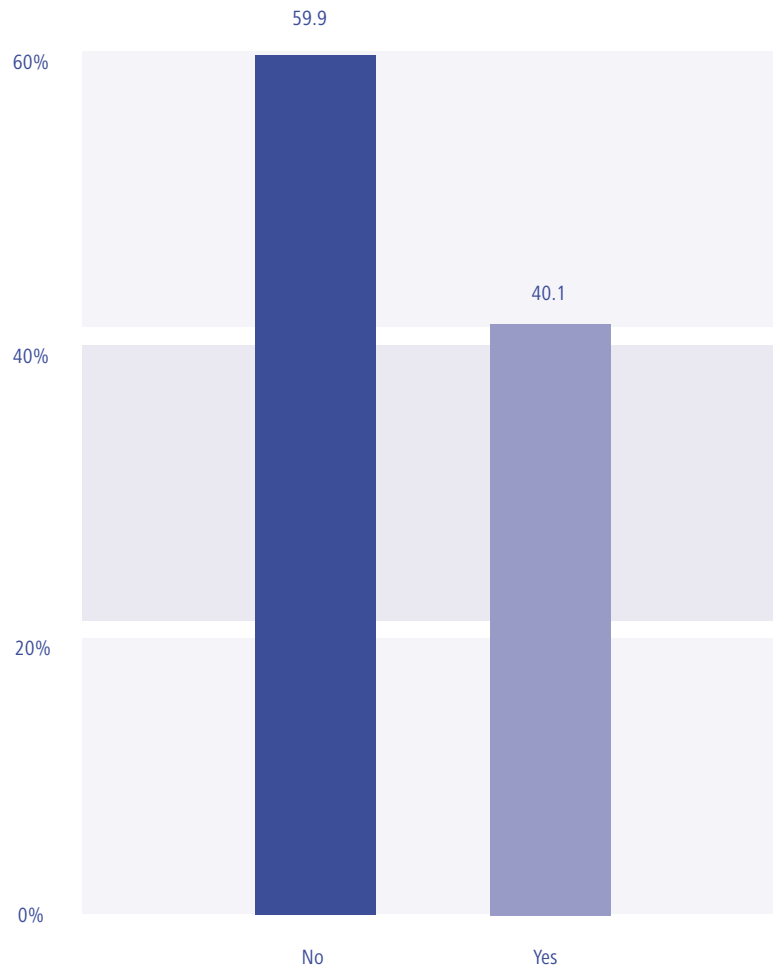


7.

PR Associations

Membership in a national professional association is much more common...

...than membership in an international association



A large majority of participants are not a member of the EACD.

EACD membership

