European Communication Monitor 2013: Executive Summary

June 27, 2013

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 state-of-the-art of communication management and the changing framework of the profession across Europe. The survey, sponsored by Ketchum, a leading global communication firm, is based on replies from more than 2,700 communication professionals in 43 European countries. A research group of professors from 11 renowned universities, led by Professor Ansgar Zerfass, has conducted the research for the seventh time in a row. With country-specific analyses for 20 national markets, the monitor is the largest annual empirical survey in the field worldwide.

This year’s findings reveal that communication professionals across Europe are faced with several challenges, ranging from communicating to a regionally diverse audience and coping with crisis situations, to addressing different generations and new digital gatekeepers. While communication has become more important for European organisations in the long run, the influence and status of practitioners has not risen, and communication budgets and resources are going down. Aligning communication strategies to overall business strategies is considered the most challenging strategic issue until 2016.

Communicating internationally is important and will even grow in the future, but solid organizational structures are still missing. The majority of professionals have dealt with a crisis situation in the previous 12 months and used a range of situational strategies and instruments depending on the specific type of crisis. Social media are merging in the media mix of organisations, yet practitioners report moderate capabilities. Many organisations use specific communication strategies and media to approach different age groups, even though the majority of professionals observe the same media preferences across generations. Few professionals believe that their organisation has adequate strategies to deal with new digital gatekeepers such as employees, consumers, or bloggers. Communicative assets of the CEO are widely considered to have a major impact on organisational success and professionals report mixed approaches to CEO positioning. Overall, European professionals are optimistic about their future career.

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.
Some of the key findings are:

- **CEO communication and reputation:** The monitor clearly identifies the importance of communicative assets of top executives, such as the CEO’s communicative capabilities to deliver key messages on behalf of the organisation. The two most recognised were the CEO’s communication skills facing the media and large audiences (92%) and within small group settings (93%). Despite the relevance of the CEO, every second organisation in Europe has not established any monitoring routines to evaluate the reputation of its highest representative. This lack of analysis might explain why only 77% try to position their CEO within the public sphere, i.e. by defining an image profile and key topics. There is a remarkable difference among the practice of CEO communication in various European countries. CEO positioning is most commonly found in the United Kingdom, Austria, Germany, the Czech Republic and Denmark, whereas it is less relevant in Belgium, Portugal, Italy, Serbia and Croatia. The awareness or appraisal of leadership and leaders in different cultures has to be taken into account.

- **Digital gatekeepers and importance of social media:** The majority of communication professionals think of employees, consumers, bloggers and online community managers as relevant digital gatekeepers. Yet, only 38% state that their organisation has developed adequate communication policies to deal with these new gatekeepers on the social web. The five most important social media communication tools are social networks or online communities, online videos, mobile applications, micro blogs (i.e. Twitter), and photo sharing. However, there are significant differences in importance for some channels across Europe. For example, photo sharing plays a major role in Eastern and South Eastern Europe, compared to many Northern and Western European countries. The perceived importance of social media is for the first time not growing anymore if compared to previous ECM surveys. The results show that social media indeed are merging in the media mix of organisations and have to be discussed as an integral part of communication management.

- **Social media skills and usage patterns:** Practitioners display rather moderate capabilities when it comes to their skills and knowledge of social media in a professional context. The highest responses are for delivering messages via the social web and for knowing about social media trends. On the flip side the weaker areas of the respondents’ competencies are knowledge about the legal framework for social media and starting web-based dialogues with stakeholders. When comparing the data with results from the ECM 2011, strategic skills, i.e. strategy development and trend analysis, have grown to a lesser extent than operational skills or are even diminishing. Additionally, the ECM survey demonstrates inevitable differences between practitioners from different age groups and also a correlation between private use and professional use of social media. For example, twice as many practitioners under the age of 30 use social media privately on a daily basis (85%) compared with the over 60s age group (43%). However, there are surprisingly small differences for the professional usage.

- **Communication strategies for different generations:** The vast majority of European communication professionals do not observe a difference in communication behaviour between the different generations, sometimes labelled as the digital natives (people under the age of 30) and the older generations (people over the age of 30). It seems that the digital gap between the generations is closing, at least in the experience of communication professionals. The digital natives do have some specific characteristics though: They are perceived to be more interactive, as reported by 89% of the professionals, more involved in communication (76%), and they are demanding more feedback (75%).
Despite the coherent communication behaviour, many organisations use specific communication strategies and media to approach different age groups. 20% do this often, 40% sometimes and 21% not yet, but have planned such diversified communication. Only 19% are not doing this and are also not planning to do so in the near future.

**International communication:** For eight out of ten professionals surveyed communicating internationally is considered a part of daily business. 68% of the respondents agreed that international communication was important for their organisation and 73% acknowledged that it will become even more important until 2016. In contrast to this, only a minority of organisations has already developed solid structures and strategies for international communication. The majority of respondents do interact with more than five countries and nearly a quarter with more than 20 countries. 99% the of targeted international communication activities takes place within Europe, followed by North America (42%), and East Asia (28%). The three most challenging issues when communicating outside Europe are developing communication strategies with social, cultural and political sensitivity, monitoring public opinion, and understanding structures of media systems and public spheres. These are pragmatic and analytical topics, underlining the early status of institutionalisation in this field.

**Crisis communication:** With European economies continuing to face challenging economic times, seven out of ten communication professionals reported that they had dealt with a crisis situation in their organisation in the previous 12 months. The top three most reported types of crisis were institutional crises, performance crises, and management or leadership crises. According to the data, the most used crisis communication strategy is the information strategy (83%) whereby practitioners use their role to provide relevant stakeholders with information, facts and figures. When asked about the tools used in crisis communication the respondents clearly highlighted media relations (76%) and personal communication (73%). Stunningly, only four out of ten respondents mention social media channels – although many crises are nowadays enforced by news and rumours spreading on the web. The type of crisis does have a bearing on the strategy and communication instruments employed to deal with it. For example, media relations is used most often in defence activities, while personal communication is the preferred choice when trying to raise sympathy. The empirical results prove that effective crisis communication involves a range of situational strategies and instruments.

**Strategic issues:** The most important strategic issue for European practitioners until 2016 is aligning communication strategies to overall business strategies (43%). Last year’s top priority, coping with the digital evolution and the social web, comes second this year. Coming third is the necessity to build and maintain trust with the public and society, followed by matching the need to address more audiences and channels with limited resources, and strengthening the role of the communication function in supporting top-management decision making. Despite the continuing debate on CSR communication, dealing with social responsibility keeps falling in importance. It can be interpreted in two ways: Professionals might have found proper strategies how to communicate in this field, so it is less challenging now, or CSR has been overvalued in the past and a more realistic view is prevailing now.

**Status, budgets, and perspectives:** 87% of the communication professionals working in communication departments state that communication has become more important for the overall success of their organisation within the last year. Despite the rising importance, only 62% say that the influence and status of their current role as a communication professional has increased. And only a small minority of
15% report that their budgets have been increased above average compared to other functions in the organisation, as opposed to 41% who state that their budgets have been reduced. Yet, the majority (59%) is optimistic when thinking of their career. Worries are mostly reported by people working in agencies, governmental organisations and private companies. Confidence is higher in some Western and Northern European countries, especially in Norway, Sweden, and Switzerland.

- **Impact of professional associations**: The perceived impact of professional associations for advancing strategic communication is relatively modest. Nearly every third respondent reported that the European Association of Communication Directors (EACD) has a high impact on the development of the profession in Europe. Yet another third thinks that the national professional organisation in the respective country is relevant. Respondents were asked to state their opinion about the most important services of European associations like the EACD for members and the profession at large. Coming first is identifying trends in the field, followed by enhancing the reputation of the practical field. Other important goals are knowledge transfer via magazines and websites for example, and information sharing at events and conferences. Supporting academic research is rated quite important, while promoting and honouring best practices with awards is judged the least relevant topic.

**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.

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.

**Contact**

Prof. Dr. Ansgar Zerfass, Lead Researcher, EUPRERA, zerfass@uni-leipzig.de, Phone +49 341 97 35040
Herbert Heitmann, President, EACD, herbert.heitmann@eacd-online.eu, Phone +32 2 219 22 90

**Sample charts from the European Communication Monitor 2013 survey**

Reproduction permitted if copyright notice and source (including URL) are clearly depicted:


High-res versions of the figures are available for download at www.eacd-online.eu in the Press Room section (300 dpi, TIF format).
Practice of CEO positioning varies among European countries

Approaches to CEO positioning are mixed

Dominant approaches in CEO positioning and communication
New gatekeepers are relevant, but strategies are still missing

Digital gatekeepers on the social web: Perceived relevance and communication strategies

- Employees who are very active on the social web are relevant gatekeepers for my organisation: 58.1% (Mean: 3.51)
- Consumers who raise their voice on the social web are relevant gatekeepers for my organisation: 53.2% (Mean: 3.40)
- Bloggers and online community managers are relevant gatekeepers for my organisation: 51.4% (Mean: 3.35)
- My organisation has developed adequate strategies and instruments to communicate with new gatekeepers on the social web: 37.7% (Mean: 3.01)

Large gap between importance and implementation of social media

Social media communications in Europe: Importance and implementation of alternative tools and channels

- Online communities (social networks): 73.1% Implemented, 51.8% Important
- Online video: 66.9% Implemented, 46.1% Important
- Mobile applications (Apps, Mobile Webs): 59.1% Implemented, 28.9% Important
- Microblogs (e.g. Twitter): 54.5% Implemented, 41.5% Important
- Photo sharing: 47.6% Implemented, 36.9% Important
- Weblogs: 38.5% Implemented, 24.7% Important
- Location-based services: 32.3% Implemented, 19.9% Important
- Slide sharing: 30.5% Implemented, 20.9% Important
- Wikis: 25.5% Implemented, 12.3% Important
- Online audio (e.g. podcasts): 22.6% Implemented, 12.1% Important
- Social bookmarks: 20.4% Implemented, 11.4% Important
- Mash-ups: 10.3% Implemented, 4.6% Important

www.communicationmonitor.eu / Zerfass et al. 2013 / n = 2,358 PR professionals. Q 8: Can you indicate the general level of importance for communication management of the following tools? Scale 1 (not important) – 5 (very important). Q 9: To what extent has your organisation implemented these instruments in its daily communication activities? Scale 1 (not used) – 5 (used significantly). Percentages: Agreement based on scale points 4-5.
Major challenges of international communication in non-European countries

- Developing communication strategies with social, cultural and political sensitivity: 73.7%
- Monitoring public opinion and understanding stakeholders: 72.2%
- Understanding structures of media systems and public spheres: 67.5%
- Communicating in multiple languages: 52.4%
- Implementing management structures (planning, organisation, evaluation): 51.2%
- Hiring and leading local communication experts for the own organisation: 51.1%
- Selecting and working with communication agencies in those countries: 42.9%
- Enforcing corporate design rules: 42.4%

Despite manifold types of crises, the information strategy is very dominant

Crisis communication strategies used by European organisations: Providing facts and figures clearly dominates

- Information strategy (providing stakeholders with facts and figures about the situation, explaining next steps, ...): 82.7%
- Sympathy strategy (expressing sympathy with those who were harmed by the situation, underlining own competences and seriousness, ...): 26.8%
- Defence strategy (pointing out that the situation is different, giving alternative interpretations, blaming others, ...): 18.4%
- Apology strategy (apologising to stakeholders about the situation, taking responsibility, promising to do better next time, ...): 17.0%
- Sit-out strategy (not communicating at all): 9.4%
Communication instruments seem to be of different value for various crisis communication strategies.

Communication professionals are optimistic about their career, but perceptions differ among countries.

Positive self-perceptions about the future of communication careers in different countries.