EUROPEAN COMMUNICATION MONITOR 2015

EXCELLENCE IN STRATEGIC COMMUNICATION

CREATING COMMUNICATION VALUE THROUGH LISTENING, MESSAGING AND MEASUREMENT. RESULTS OF A SURVEY IN 41 COUNTRIES.

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CREATING COMMUNICATION VALUE THROUGH LISTENING, MESSAGING AND MEASUREMENT. RESULTS OF A SURVEY IN 41 COUNTRIES.

Ansgar Zerfass, Dejan Verčič, Piet Verhoeven, Angeles Moreno & Ralph Tench

A study conducted by the European Public Relations Education and Research Association (EUPRERA) and the European Association of Communication Directors (EACD) supported by partner PRIME Research International and media partner Communication Director magazine

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Content

Foreword

The 2015 edition of the European Communication Monitor provides a direct line into the mindset of communicators across Europe, revealing the trends, challenges and new ideas that are prevalent in European communications management today.

As with previous years, linking communications and business strategy remains the key management issue identified by communicators in Europe. For this link to occur, communicators must demonstrate the value of the function to organisational executives. The survey results suggest communicators are likely to highlight the positive effects on reputation, brand and organisational culture as evidence of this value. Citing positive impacts on economic value and tangible and intangible resources is used to a lesser extent.

The dynamic development of the communication function during the digital age has opened up many new channels for reaching stakeholders. The majority of communicators surveyed in the European Communication Monitor believe the integration of these channels with those already in existence is crucial for a successful communications strategy. Digital channels have also led to the opportunity for data analysis to be incorporated into the assessment of communications campaigns. Yet, according to this year's Monitor, more than half of all communications departments utilise traditional measurement and evaluation activities without leveraging the value of data for managing communications.

The European Association of Communication Directors (EACD) is committed to supporting communicators in their goal to execute successful communications management strategies. Through a continuous exchange with our members we hope to assist communicators in implementing innovative content strategies and data analytics. The results of the survey illustrate ambition for further progress and we at the EACD are motivated to display how the communication function contributes value to every organisation. I invite you to explore the findings of this year's European Communication Monitor in-depth on the following pages.

Dr. Herbert Heitmann

President, European Association of Communication Directors (EACD)

Introduction

Rapid changes in the communication environment challenge organisations around the globe. Many claim that mass media are losing their leading role in shaping public opinion and new approaches like content marketing are propagated. However, there is little evidence that this helps to support organisational goals. Looking further, there is no compelling answer at all to the overarching question of how communication creates value for organisations – instead, various rationales like building reputation, managing relationships, avoiding crises, securing legitimacy, identifying opportunities or supporting sales compete with each other both in theory and practice.

The European Communication Monitor 2015 explores these questions as well as a number of other important topics in the field. With 2,253 communication professionals from 41 countries participating and detailed analyses for 20 countries, it is the largest annual survey of its kind worldwide. The study reveals that there is a vast discrepancy between the ambition of communication professionals to build immaterial assets, which they also claim as being valuable to top executives, and their practices of evaluating such impacts. The study also shows that organisational listening is a premier, but often neglected, goal for strategic communication.

On behalf of the research team, I would like to thank all professionals who spent some of their valuable time to participate in the survey. Our national partners from many renowned universities, assistant researchers Markus Wiesenberg and Ronny Fechner, and Stefanie Schwerdtfeger and Grit Fiedler at the EACD did a great job. Many thanks to our partners Communication Director magazine and PRIME Research International – they enabled us to deliver this report to you.

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

Research design

Research design

The European Communication Monitor (ECM) is a unique, longitudinal transnational survey in strategic communication. It has been organised annually since 2007 and similar studies have been initiated by the research team on other continents (Latin America, since 2014, and Asia-Pacific, starting 2015). All surveys focus on current practices and future developments of communication management and public relations in corporations, non-profits, governmental organisations and communication agencies. Owing to its depth, long-term consistency of questions and structure, the ECM is known as the most comprehensive research in the field worldwide. The ninth edition presented in this report is based on responses from 2,253 communication professionals from 41 countries.

A joint study by academia and practice, the ECM is organised by the European Public Relations Education and Research Association (EUPRERA) and the European Association of Communication Directors (EACD), supported by partner PRIME Research International, a global leader in strategic communication research, and media partner Communication Director magazine. Authors of the study are five university professors representing leading academic institutions in the field, led by Professor Ansgar Zerfass from the University of Leipzig. A wider board of professors and national research collaborators ensure that the survey reflects the diversity of the field across Europe. The research framework for the survey has been modified and expanded in 2015. The survey questionnaire includes a large number of independent and dependent variables along five key factors: personal characteristics of communication professionals (demographics, education, job status, experience); features of the organisation (structure, country); attributes of the communication function; the current situation as well as perceptions on key developments relevant for the profession.

The study explores three constructs. Firstly, dynamics in the field are identified by longitudinal comparisons, i.e. on strategic issues, collaboration between communication functions, measurement, and salaries. To this end, questions from previous ECM surveys (Zerfass et al., 2014, 2011, 2010) have been repeated. Secondly, recent developments in practice and academic theories are empirically tested by using a set of questionnaire instruments derived from literature. The conceptual background of the ECM 2015 includes debates on the future role of mass media for opinion building and strategic communication (Macnamara, 2014b; Supa, 2014), new concepts like content marketing, brand journalism and native advertising (Hallahan, 2014), integration of communication activities (Smith, 2012), alternative ways to explain the value of communication (Kiesenbauer & Zerfass, 2015), organisational listening (Macnamara, 2014c), measurement and evaluation (Watson & Noble, 2014), as well as collaboration and conflict between communication departments and agencies (Eagle et al., 2015: 123-138). Last but not least, this study applies statistical methods to identify outperforming communication departments in the sample. Excellent communication functions differ from others in various aspects, and the ECM explains these differences. The multitude of insights based on research instead of aspirations and promises enables the profession to strengthen or reject concepts in the field and take informed decisions.

Methodology and demographics

Methology and demographics

The questionnaire used for the European Communication Monitor 2015 consisted of 33 questions arranged in 19 sections. Three questions were used in two different versions for respondents working in communication departments and agencies respectively. Six questions were only presented to professionals working in departments. All instruments were based on research questions and hypotheses derived from previous research and literature.

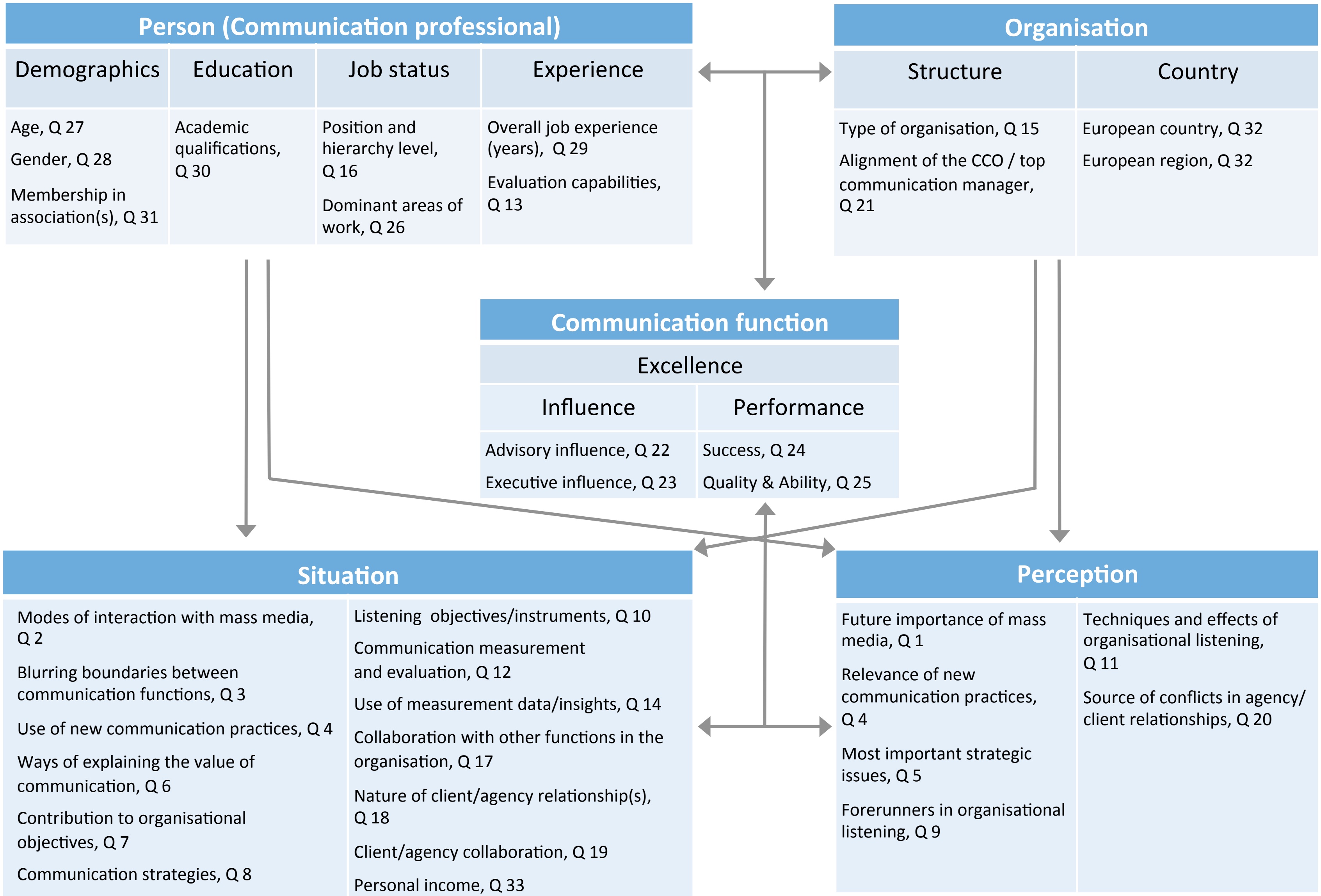
The online survey used the English language and was pre-tested with 51 communication professionals in 18 European countries. Amendments were made where appropriate and the final questionnaire was activated for four weeks in March 2015. 30,000+ professionals throughout Europe were invited with personal e-mails based on a database provided by the European Association of Communication Directors (EACD). Additional invitations were sent via national research collaborators and professional associations. 6,415 respondents started the survey and 2,391 of them completed it. Answers from participants who could not be clearly identified as part of the population were deleted from the dataset. This strict selection of respondents is a distinct feature of the ECM and sets it apart from many studies which are based on snowball sampling or which include students, academics and people outside of the focused profession or region. The evaluation is then based on 2,253 fully completed replies by communication professionals in Europe.

The Statistical Package for the Social Sciences (SPSS) was used for data analysis. Results have been tested statistically with, depending on the variable, Pearson's chi-square tests (χ^2), ANOVA/Scheffe post-hoc tests, Cramér's V, one sample T-Tests, and independent samples T-tests. In this report, results are classified as significant ($p \le 0.05$)* or highly significant ($p \le 0.01$)** in the graphics and tables or marked in the footnotes.

The demographics show that seven out of ten respondents are communication leaders: 44.0 per cent hold a top hierarchical position as head of communication or as CEO of a communication consultancy; 27.2 per cent are unit leaders or in charge of a single communication discipline in an organisation. 62.3 per cent of the professionals interviewed have more than ten years of experience in communication management, 59.0 per cent of them are female and the average age is 41.4 years. A vast majority (94.8 per cent) in the sample has an academic degree, and more than two third hold a graduate degree or even a doctorate. Almost three out of four respondents work in communication departments in organisations (joint stock companies, 25.0 per cent; private companies, 17.5 per cent; government-owned, public sector, political organisations, 17.4 per cent; non-profit organisations, associations, 11.1 per cent), while 28.9 per cent are communication consultants working freelance or for agencies. Most respondents (30.1 per cent) are based in Southern Europe (countries like Italy, Spain, Croatia), followed by Western Europe (28.6 per cent; countries like Germany, Netherlands, France), Northern Europe (24.9 per cent; countries like Norway, Sweden, United Kingdom), and Eastern Europe (16.4 per cent; countries like Poland, Romania, Ukraine). The universe of 50 European countries is based on an official list of European Countries by the European Union. Countries are assigned to regions according to the official classification of the United Nations Statistics Division (2013).

Overall, 41 countries participated in the survey. The dataset provided more detailed insights for 20 countries, including most key markets in Europe.

Research framework and questions



Demographic background of participants

Position

Head of communication, agency CEO	44.0%
Responsible for single communication discipline, unit leader	27.2%
Team member, consultant	22.7%
Other	6.1%

Organisation

Communication department		71.1%
▪ joint stock company	25.0%	
▪ private company	17.5%	
▪ government-owned, public sector, political organisation	17.4%	
▪ non-profit organisation, association	11.1%	
Communication consultancy, PR agency, freelance consultant		28.9%

Job experience

More than 10 years	62.3%
6 to 10 years	23.4%
Up to 5 years	14.3%

Alignment of the communication function

Strongly aligned communication department	26.4%
Aligned communication department	59.8%
Weakly aligned communication department	13.7%

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 2,253 PR professionals. Q 15: Where do you work? Q 16: What is your position? Q 29: How many years of experience do you have in communication management/PR? Alignment: n = 1,601 PR professionals in communication departments. Q 21: Within your organisation, the top communication manager or chief communication officer / is a member of the executive board / reports directly to the CEO or highest decision-maker on the executive board / does not report directly to the CEO or highest decision-maker.

Personal background of respondents

Gender / Age

	Overall	Head of communication, Agency CEO	Team leader, Unit leader	Team member, Consultant
Female	59.0%	54.1%	57.2%	67.9%
Male	41.0%	45.9%	42.8%	31.1%
Age (on average)	41.4 yrs	44.5 yrs	39.9 yrs	37.5 yrs

Membership in a professional association

EACD	11.9%
Other international communication association	12.3%
National PR or communication association	53.9%

*Highest academic educational qualification**

Doctorate (Ph.D., Dr.)	7.9%
Master (M.A., M.Sc., Mag., M.B.A.), Diploma	60.8%
Bachelor (B.A., B.Sc.)	26.1%

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 2,253 PR professionals. Q 27: How old are you? Q 28: What is your gender? Q 30: Please state the highest academic/educational qualifications you hold. * No academic degree = 5.2%. Q 31: Are you a member of a professional organisation?

Countries and regions represented in the study

Respondents are based in 41 European countries and four regions

Northern Europe 24.9% (n = 561)	Western Europe 28.6% (n = 645)	Eastern Europe 16.4% (n = 369)	Southern Europe 30.1% (n = 678)
Denmark	Austria	Armenia *	Bosnia and Herzegovina
Estonia	Belgium	Belarus	Croatia
Finland	France	Bulgaria	Cyprus *
Iceland	Germany	Czech Republic	Greece
Ireland	Luxembourg	Hungary	Italy
Latvia	Netherlands	Moldova	Kosovo **
Lithuania	Switzerland	Poland	Macedonia
Norway		Romania	Malta
Sweden		Russia	Portugal
United Kingdom		Slovakia	Serbia
		Ukraine	Slovenia
			Spain
			Turkey *

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 2,253 PR professionals. Q 32: In which European state are you normally based? In this survey, the universe of 50 European countries is based on the official country list by the European Union (http://europa.eu/about-eu/countries, 2014). Countries are assigned to regions according to the official classification of the United Nations Statistics Division (2013). Countries marked * are assigned to Western Asia; countries marked ** are not included in the UN classification. These countries were collated like adjacent nations. No respondents were registered for this survey from Albania, Andorra, Azerbaijan*, Georgia*, Liechtenstein, Monaco, Montenegro, San Marino, Vatican City.

Future relevance of mass media

Chapter overview

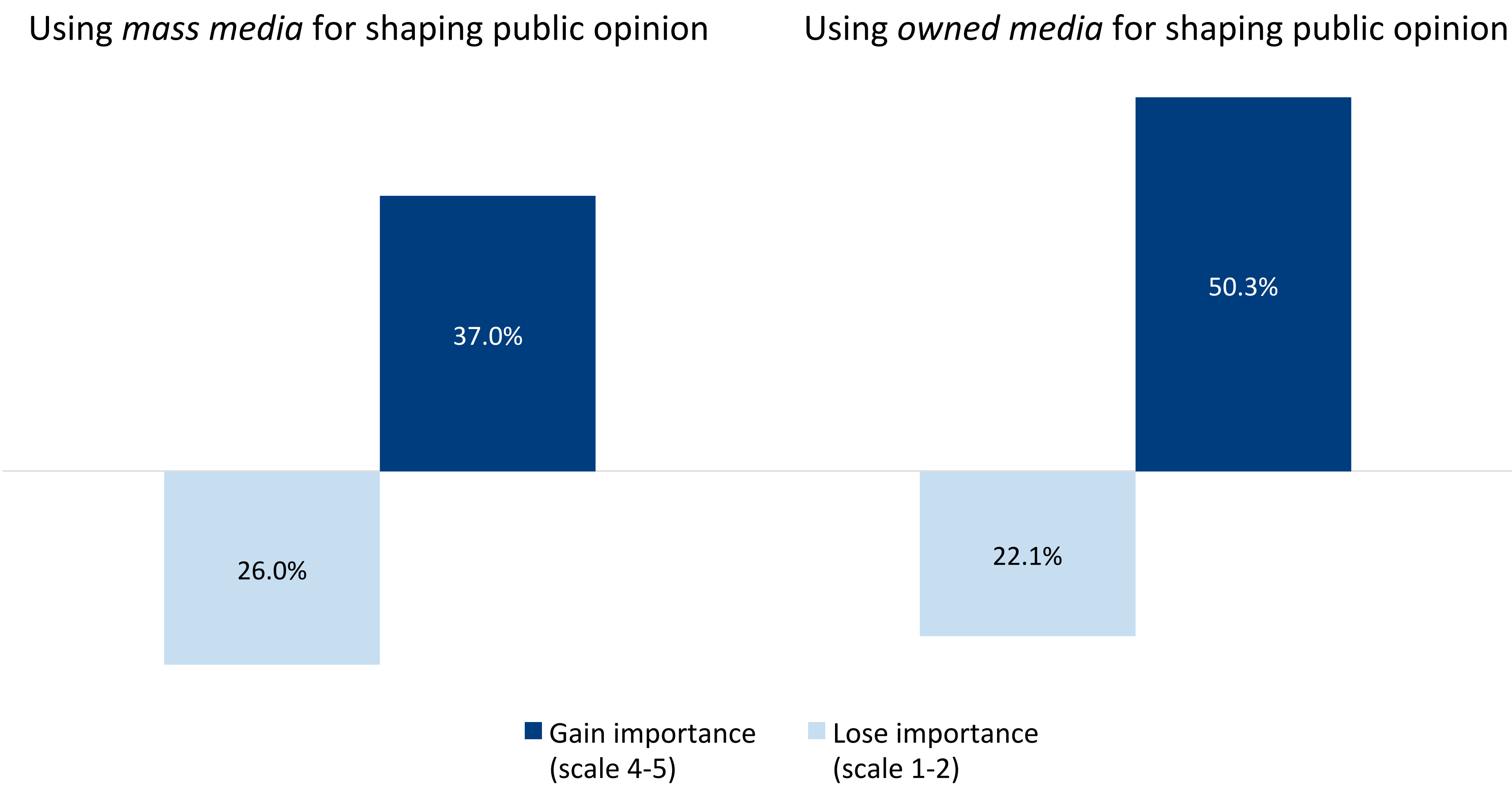
Developments and changes of mass media significantly affect strategic communication practice. Traditional media like press, radio and television were divided between editorial (news) and advertising content, while today we are witnessing the evolution into the PESO (= paid, earned, social and owned) media environment (Hallahan, 2014; Verčič & Tkalac Verčič, 2015). Communication professionals in Europe predict a tectonic shift from the predominance of mass media to owned media (which used to be called "corporate publishing") for shaping public opinion. More than half the respondents predict an increasing importance of owned media in the next three years (50.3 per cent). This might diminish the societal role of specialised media organisations and facilitate the transformation of all organisations into (also) media organisations (Ihlen & Pallas, 2014). Mass media are predicted to be more relevant in the future in Eastern and Southern Europe in comparison to Western and Northern Europe.

Strategic communicators intend to spend less on advertising (paid interactions with the mass media), while they see a strong rise in the use of unpaid interactions with the mass media (e.g. through media relations programs, 57.1 per cent believe this will gain in importance) and even more for strategic partnerships with the mass media (61.3 per cent gain in importance). Jointly produced quality content and/or creation of topical platforms will be especially relevant in Eastern and Southern Europe.

Although these trends are obvious and strong, it would be premature to predict the death of the traditional mass media: nearly three quarters of the respondents use the mass media to monitor news and public opinion (74.3 per cent), and more than two thirds of them evaluate media coverage of the organisation, its products and services. Over one third of them also use mass media content as a source for internal news services (39.3 per cent). Besides these inbound uses of the mass media, communicators still extensively use the mass media for outbound reasons: more than seven out of ten respondents spread information about the organisation, its products and services through the mass media and more than half use them to influence gatekeepers, the media agenda and stakeholders. This result is congruent with other studies on the current relationship between journalism and public relations (Macnamara, 2014b; Supa, 2014; Zoch & Molleda, 2006).

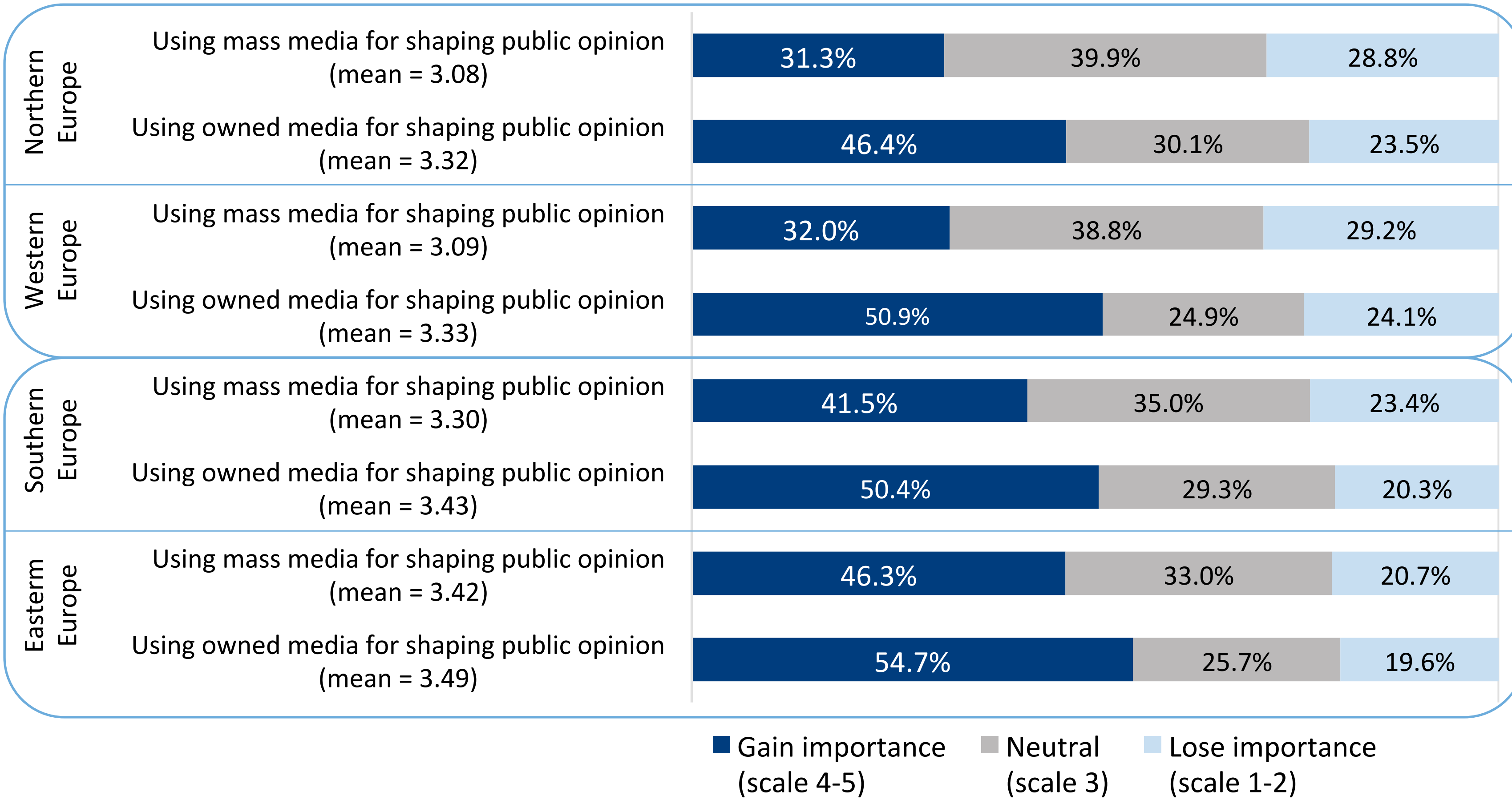
Perceptions of the future of media relations developments are largely dependent on the area of communication in which professionals are working. Strategic partnerships with the mass media are preferred by specialists in marketing, brand and consumer communication and those working in online media. Those specialists are also strongly in favour of concepts like content marketing, brand journalism and native advertising. This seems to confirm Hallahan's (2014) observation of an "encroachment on public relations by marketers" (Hallahan, 2014: 406). Lines between advertising and publicity are blurring, and new rules of behaviour will be needed for professional communicators: "The PR, advertising, marketing, and media industries need to work together to develop consistent responsible codes of practice in relation to emerging practices of 'embedded' marketing communication in its various guises, such as 'native advertising', 'integrated content', and new forms of 'advertorial' to address their potential negative effects on the public sphere through the blurring of boundaries between paid promotion and independent news, analysis, and commentary" (Macnamara, 2014a: 231).

Future of public opinion building: Divided views on the relevance of mass media for strategic communication – but a majority believes in owned media



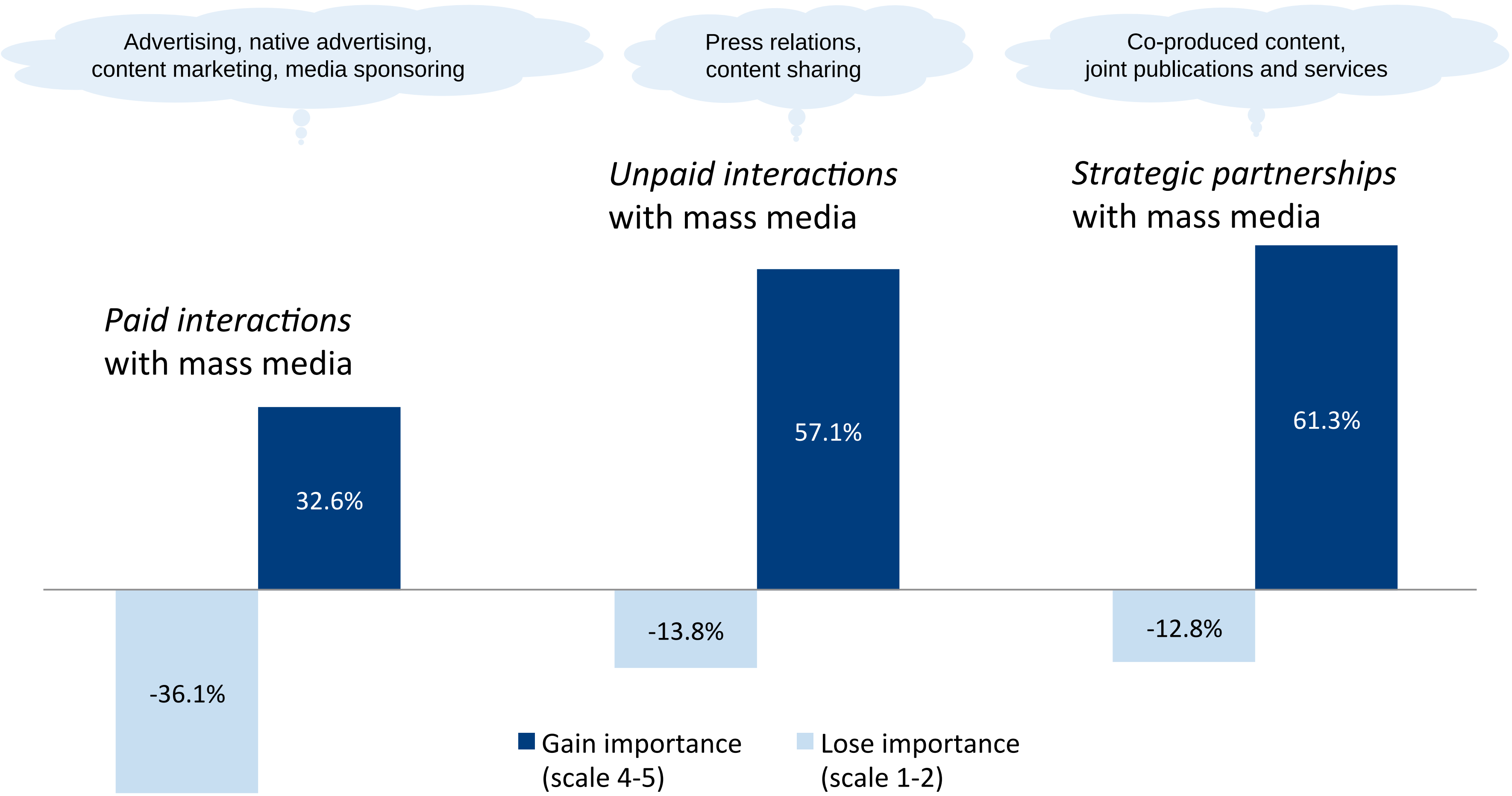
www.communicationmonitor.eu / Zerfass et al. 2015 / n ^{min} = 2,232 PR professionals. Q 1: The mass media industry and journalism face dramatic challenges, which might change the way organisations interact with them. Please rate the relative importance of those activities for strategic communication within the next three years. Scale 1 (Lose a lot of importance) – 5 (Gain a lot of importance).

Mass media is perceived more relevant for shaping public opinion in Southern and Eastern Europe, compared to Western and Northern Europe



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 2,244 PR professionals. Q 1: The mass media industry and journalism face dramatic challenges, which might change the way organisations interact with them. Please rate the relative importance of those activities for strategic communication within the next three years. Scale 1 (Lose a lot of importance) – 5 (Gain a lot of importance). Mean values. Highly significant differences (ANOVA/Scheffe post-hoc test, $p \leq 0.01$, $F = 12.535$) between Northern/Western Europe and Southern/Eastern Europe for item “Using mass media for shaping public opinion”. Highly significant differences (chi-square test, $p \leq 0.01$) between regions for all items.

Collaboration between communication professionals and mass media: Strategic partnerships and unpaid interactions will be more important



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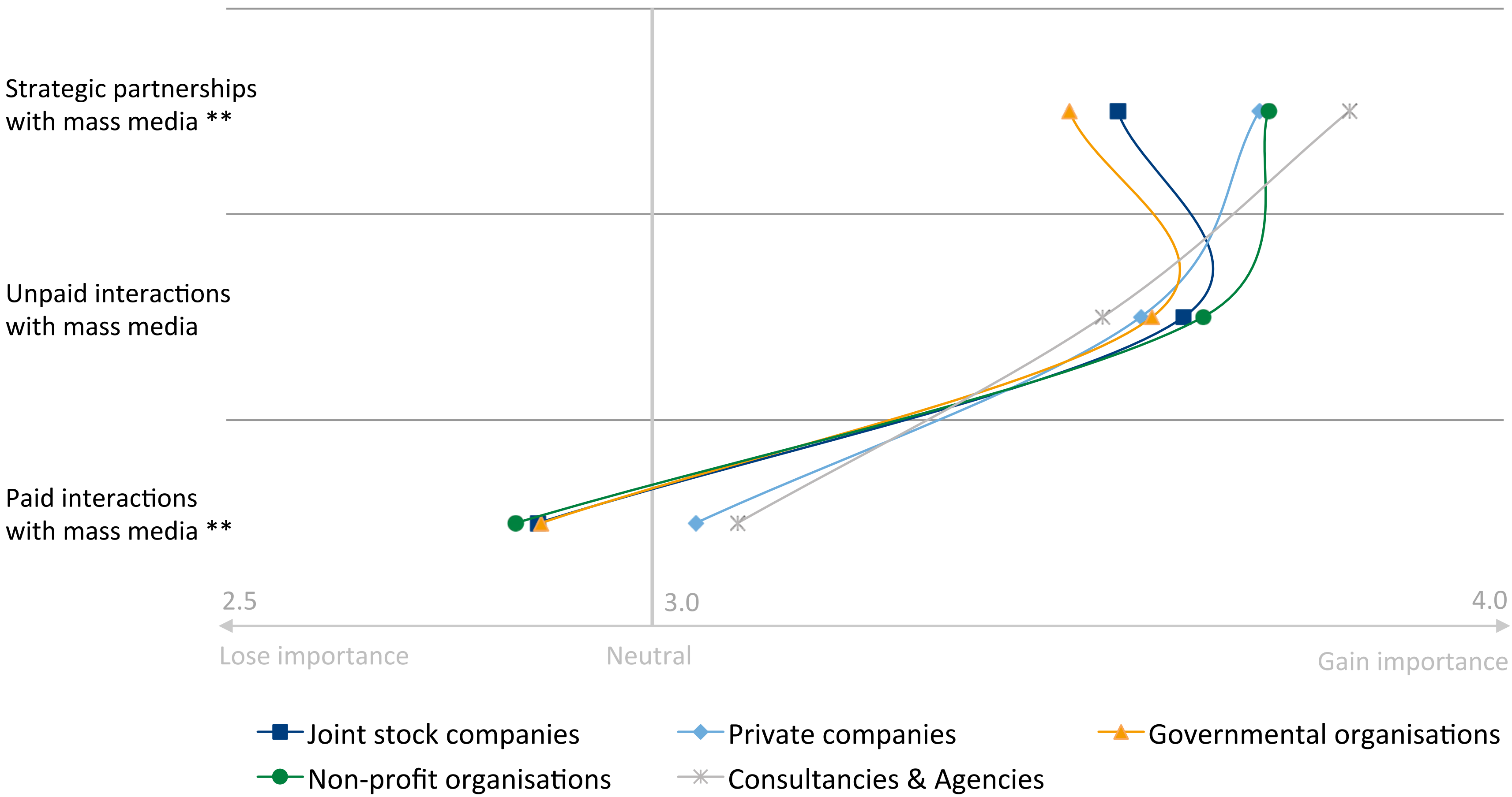
Strategic partnerships and paid collaborations are valued differently by various types of organisations



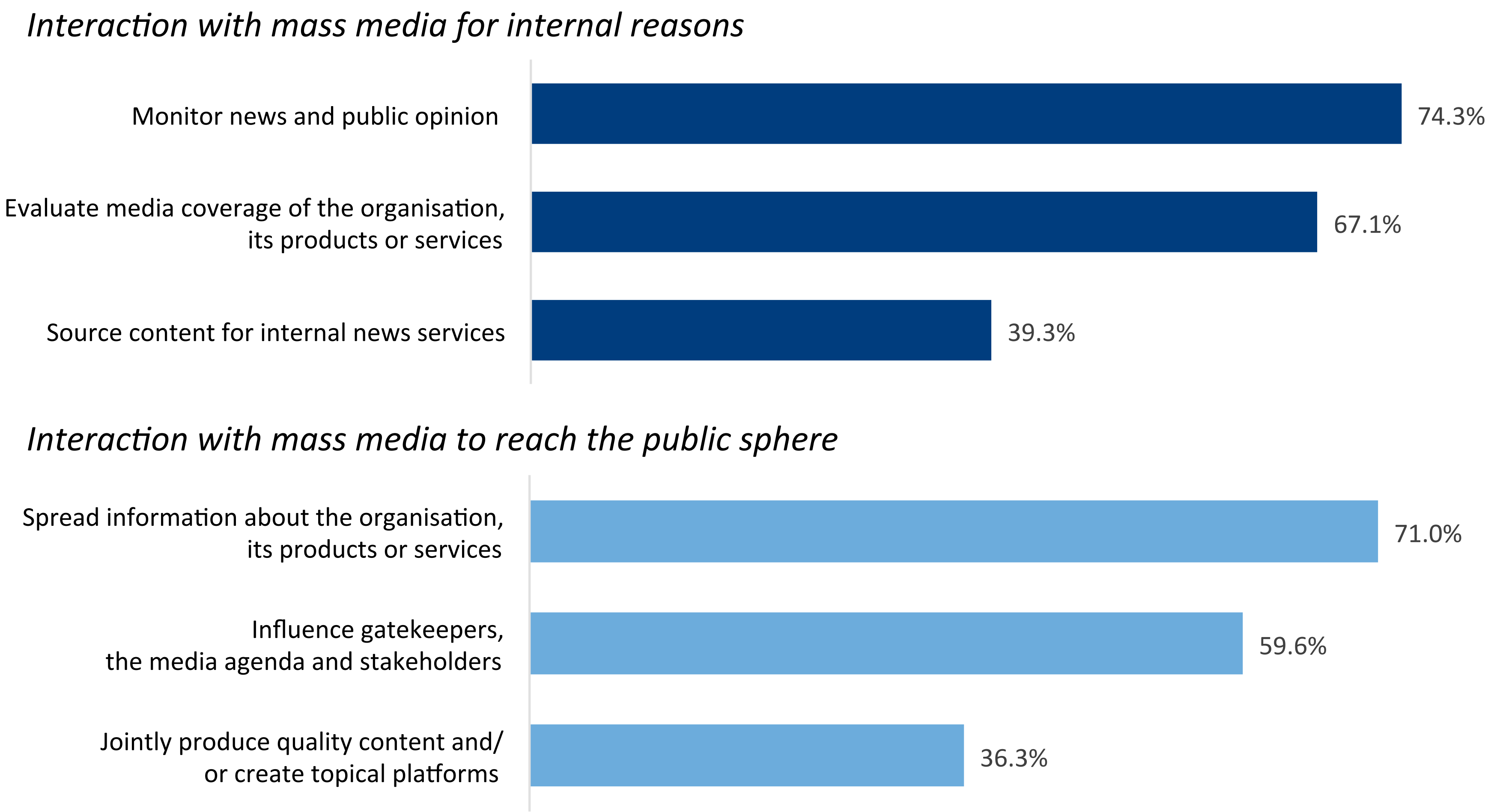
www.communicationmonitor.eu / Zerfass et al. 2015 / n ^{min} = 2,232 PR professionals. Q 1: The mass media industry and journalism face dramatic challenges …Please rate the relative importance of those activities for strategic communication within the next three years. Scale 1 (Lose a lot of importance) – 5 (Gain a lot of importance). Mean values. ** Highly significant differences (ANOVA/Scheffe post-hoc test, p ≤ 0.01).

Assessment of mass media and owned media is significantly correlated with the professional role and experience of communicators

Communication professionals working in ...	Media relations	Online communication	Strategy and coordination	Marketing, brand, consumer communication
Using owned media for shaping public opinion	3.39	3.56 **	3.38	3.45
Using mass media for shaping public opinion	3.34 **	3.16	3.11 *	3.22
Strategic partnerships with mass media	3.68	3.73	3.58 *	3.85 **
Unpaid interactions with mass media	3.69 **	3.60	3.62	3.71 **
Paid interactions with mass media	2.96	3.20 **	2.83 **	3.10 **

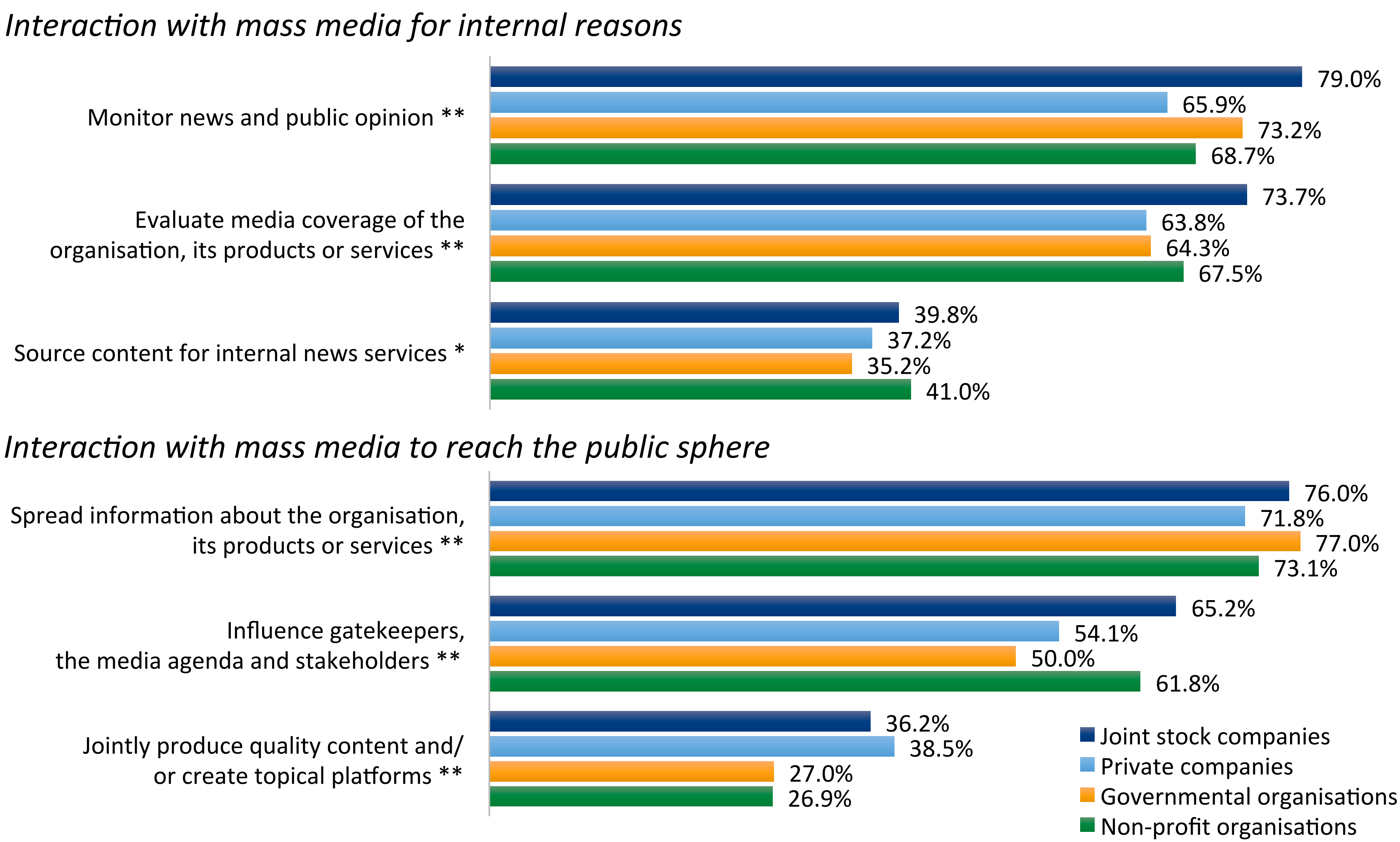
www.communicationmonitor.eu / Zerfass et al. 2015 / n_{min} = 2,232 PR professionals. Q 1: The mass media industry and journalism face dramatic challenges, which might change the way organisations interact with them. Please rate the relative importance of those activities for strategic communication within the next three years. Scale 1 (Lose a lot of importance) – 5 (Gain a lot of importance). Mean values. * Significant differences (Independent samples T-Test, $p \leq 0.05$). ** Highly significant differences (Independent samples T-Test, $p \leq 0.01$).

Rationales for working with the media today in organisational communication



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 2,237 PR professionals. Q 2: Why does your organisation interact with the mass media? (Agencies/consultants: Think of your own organisation, not of your clients). My organisation (or our service providers) use mass media and their products to … Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5.

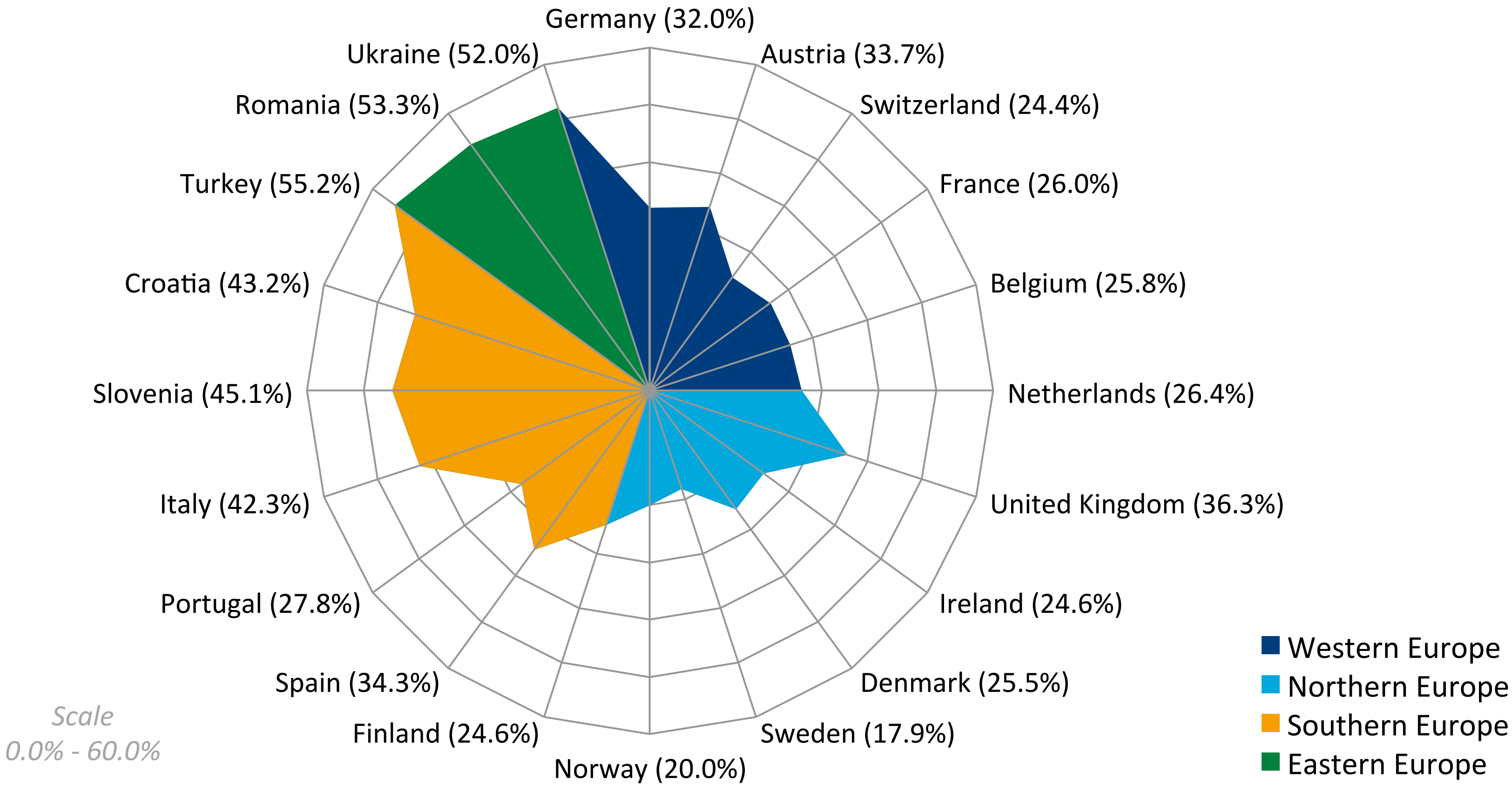
Use of mass media in different types of organisations



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,589 PR professionals in communication departments. Q 2: Why does your organisation interact with the mass media? My organisation use mass media and their products to … Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5. * Significant differences (chi-square test, $p \leq 0.05$). ** Highly significant differences (chi-square test, $p \leq 0.01$).

Co-producing content and platforms with mass media is more prevalent in Eastern and Southern Europe

Frequent jointly produce quality content and/or create topical platforms



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,880 PR professionals from 20 countries. Q 2: Why does your organisation interact with the mass media (Agencies/consultants: Think of your own organisation, not of your clients)? My organisation (or our service providers) use mass media and their products to … Item: Jointly produce quality content and/or create topical platforms. Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5. Highly significant differences (chi-square test, p ≤ 0.01).

Integrating communication and content strategies

Chapter overview

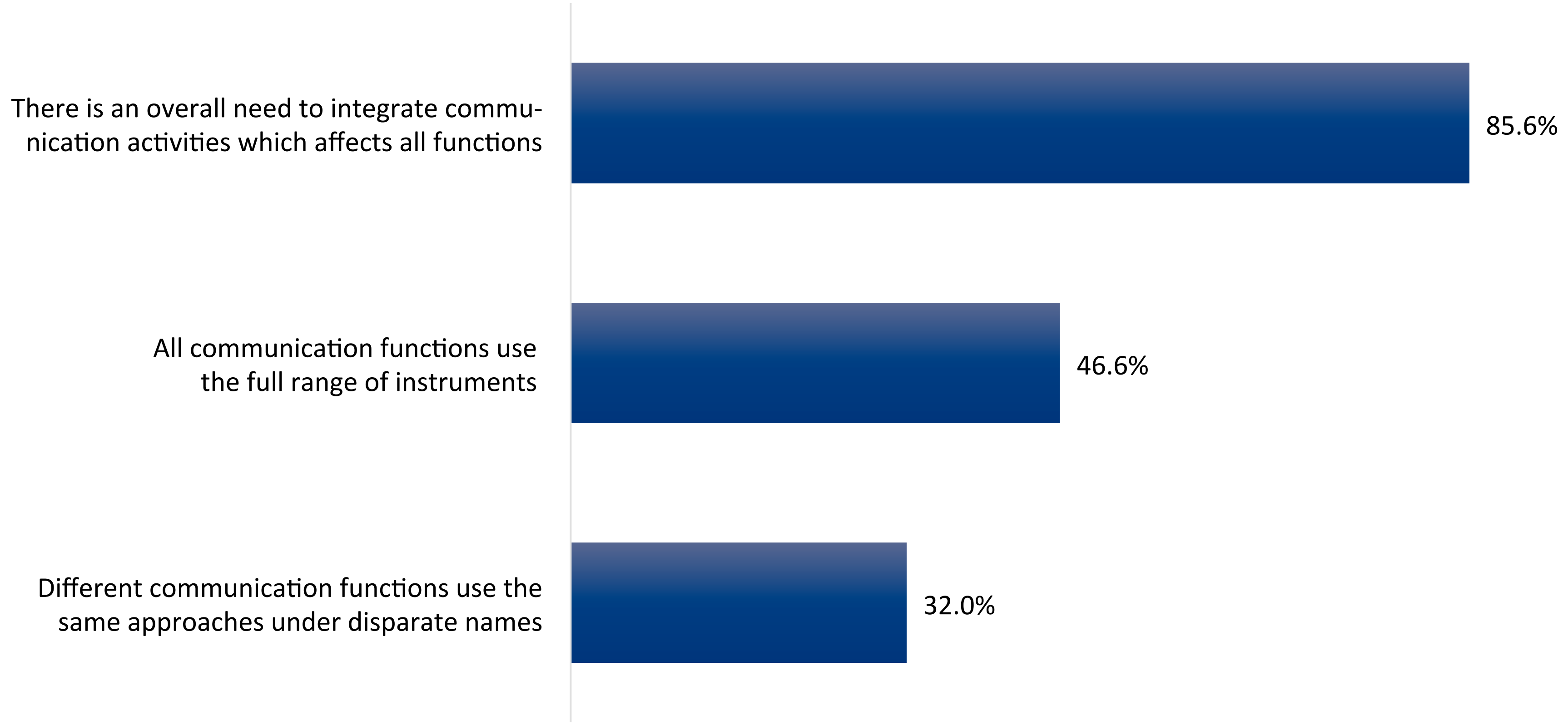
In public relations literature, there is an axiom of the necessity to differentiate public relations and marketing, and keep them separated. On the other hand, there is a growing body of academic literature advocating the need to integrate all communication functions, marketing and public relations included. Grunig et al. (2002) identified the separation of public relations and marketing as one of the characteristics of excellent communication. Hallahan et. al. (2007) proposed to conceptualise all organisational communication activities as strategic communication. Smith (2012) noted that emerging digital communication technology challenges the functional boundaries between public relations and marketing. Zerfass and Dühring (2012) identified a strong convergence of stakeholder priorities, goals and instruments when interviewing PR and marketing professionals about their branding activities, as well as a high level of structural integration and collaboration, although there are also underlying conflicts, discrepancies and contradictory perceptions.

85.6 per cent of respondents in this study believe that there is an overall need to integrate communication activities which affect all functions. But comparison to the monitor research from 2011 shows that there is hardly any progress in integrating communication by intra-organisational collaboration: ties between functions have not been strengthened during the last five years. Collaboration is stronger in publicly traded (joint stock) and private companies, and weaker in non-profit and governmental organisations. Nearly two thirds of respondents report that corporate communication is gaining in importance as it has a long tradition of handling content, while nearly half of respondents (64.0 per cent) also see marketing gaining in importance (45.2 per cent) as a consequence of the same processes.

Researchers are sometimes slow in addressing newly popular concepts of content strategy, brand journalism, content marketing and native advertising (Bull, 2013; Hallahan, 2014; Halvorson & Rach, 2012; Light, 2014; Pulizzi, 2014, Rockley & Cooper, 2012) as if they are only passing hypes. Communication professionals in Europe, however, perceive these concepts as very important: content strategy 93.0 per cent, content marketing 87.8 per cent, brand journalism 75.0 per cent, and native advertising 55.0 per cent, with strong gaps from 20.8 to 34.7 per cent when compared to their actual usage. There are significant differences between countries. For example, content marketing has high usage in the United Kingdom (72.6 per cent) as well as Finland (76.1 per cent), compared to Slovenia (47.1 per cent) and Croatia (46.4 per cent) who are slow movers in this respect. Major differences were also found for the usage of content strategy as well as brand journalism – the latter practice being very popular in Danish (57.1 per cent), Dutch (47.9 per cent), and British (45.9 per cent) organisations.

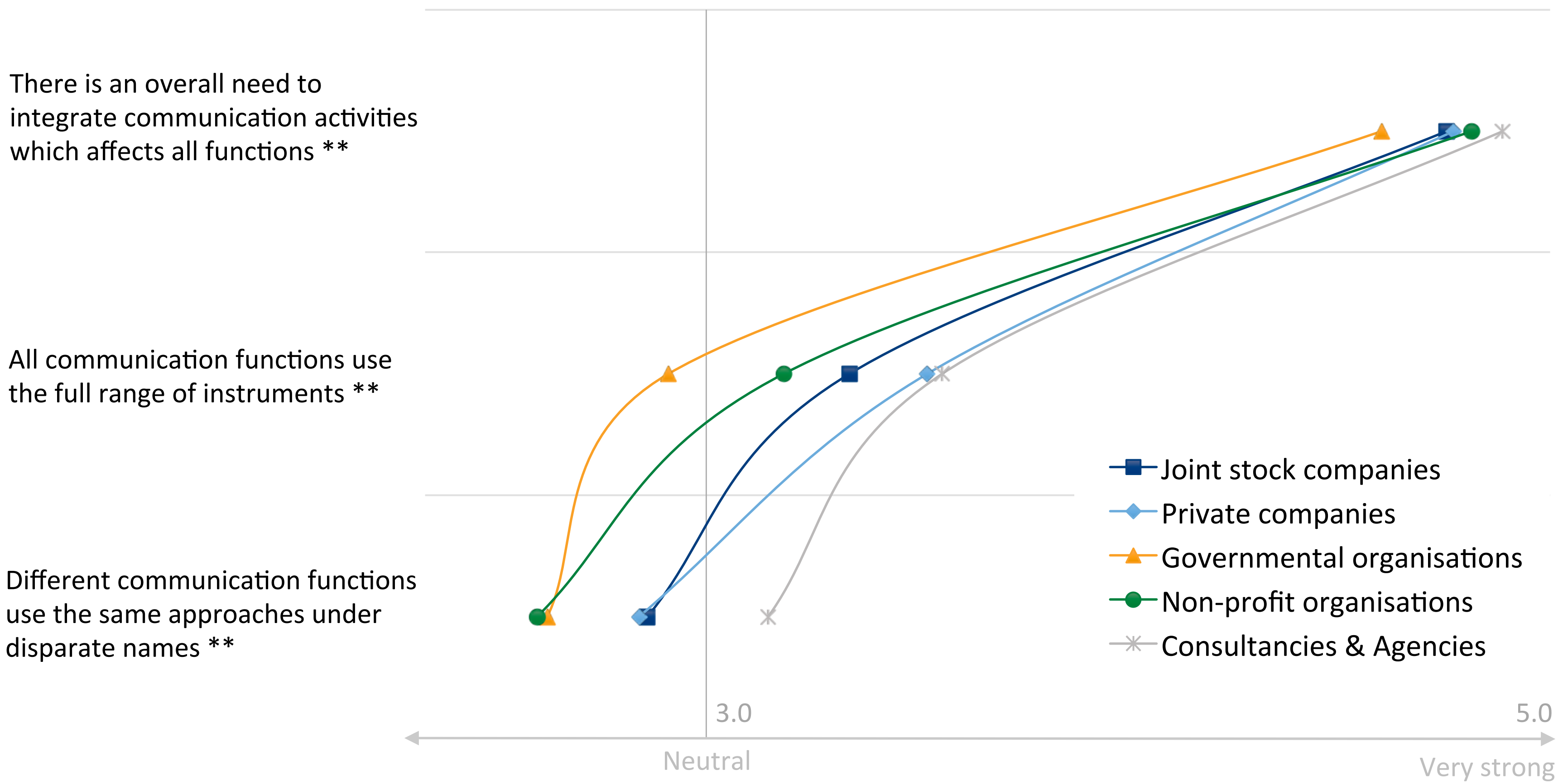
Marketing, brand, consumer and online communicators are more in favour of these concepts than media relations or strategy and coordination people. There seems to be a defensive and conservative tendency at work here involving “traditional” public relations functions (e.g. media relations). Instead of using the integration of communication functions as an opportunity, also to organise an umbrella under which communications from marketing departments could migrate and feel welcome, many seem try to preserve their turf in what is a diminishing territory. Media are not what they used to be and the demarcation line between news and advertising is becoming fuzzy. There is no way that the lines between advertising/marketing and publicity/public relations could stay untouched. The question is not if different communications functions will integrate; the question is how and with what effect they will.

Strong need to integrate communication activities as many instruments are used by different functions



www.communicationmonitor.eu / Zerfass et al. 2015 / n_{min} = 2,212 PR professionals. Q 3: New communication practices might affect the division of work and importance of different communication functions like corporate communications / public relations and marketing. Please state whether you see these trends happening in your organisation or at your clients: Scale 1 (Not at all) – 5 (Very strong). Percentages: Relevance based on scale points 4-5.

Integrated approaches are supported by all kinds or organisations, while the use of instruments differs significantly among them



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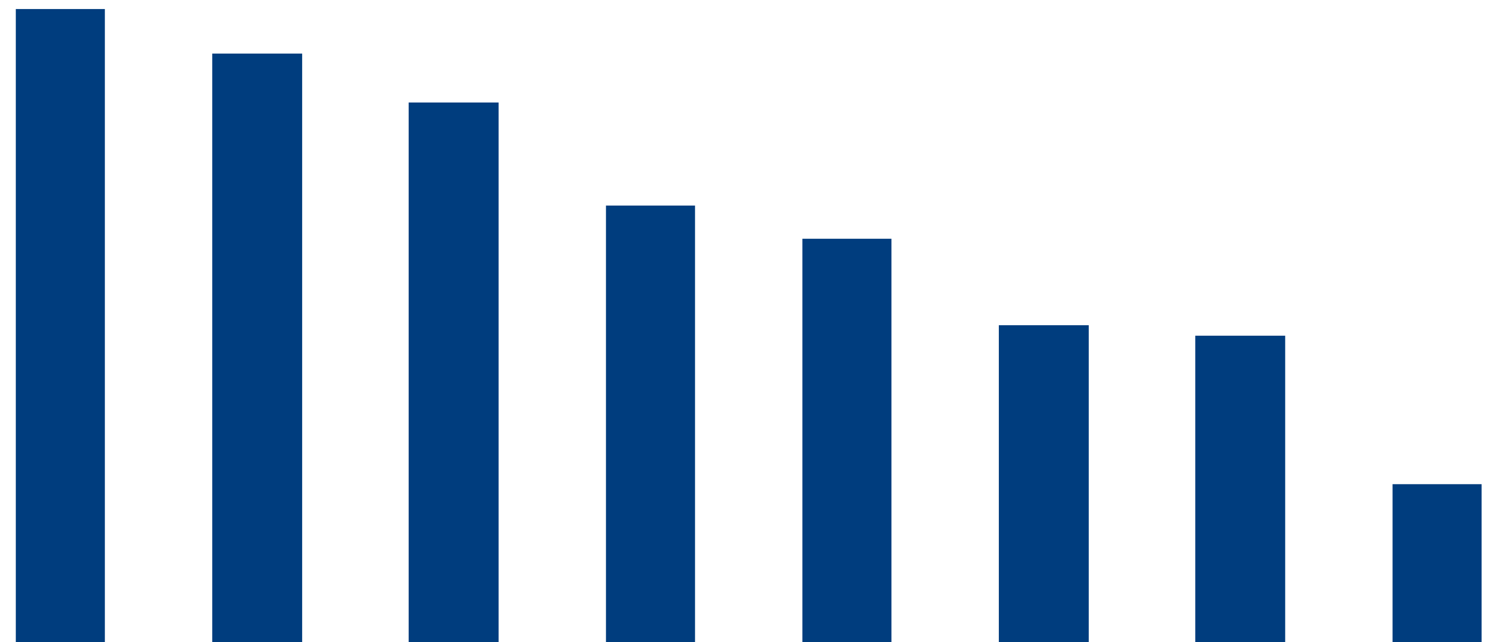
Integrating communication by intra-organisational collaboration: ties between functions have not been strengthened during the last years

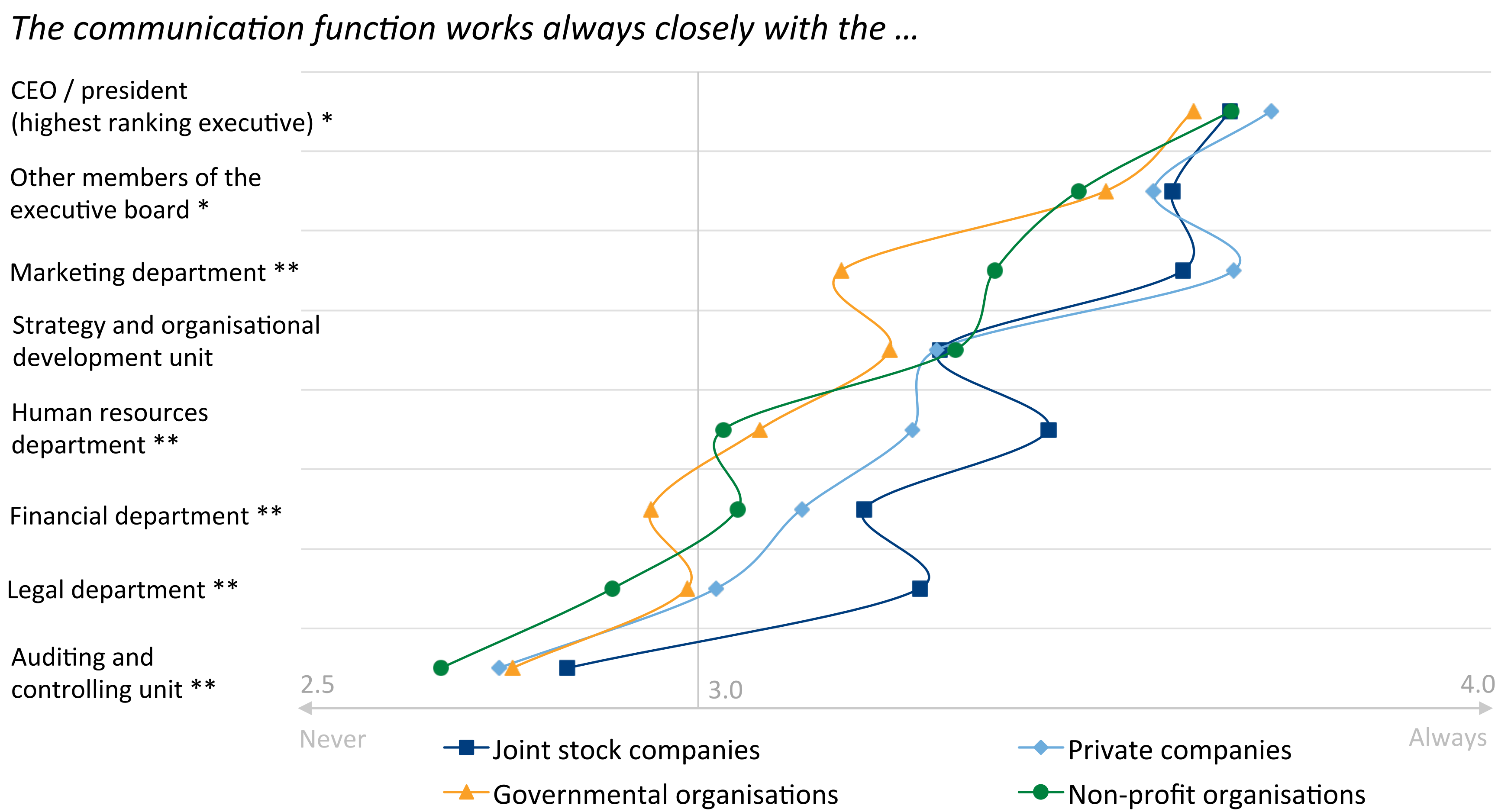
The communication function works always closely with the …



	CEO / president (highest ranking executive)	Other members of the executive board	Marketing department	Strategy and organisational development unit	Human resources department	Legal department	Financial department	Auditing and controlling unit
■ 2015	84.8%	78.9%	72.4%	58.8%	54.3%	42.8%	41.5%	21.8%
2011	86.6%	78.0%	77.1%	61.7%	54.1%	44.4%	39.1%	19.3%

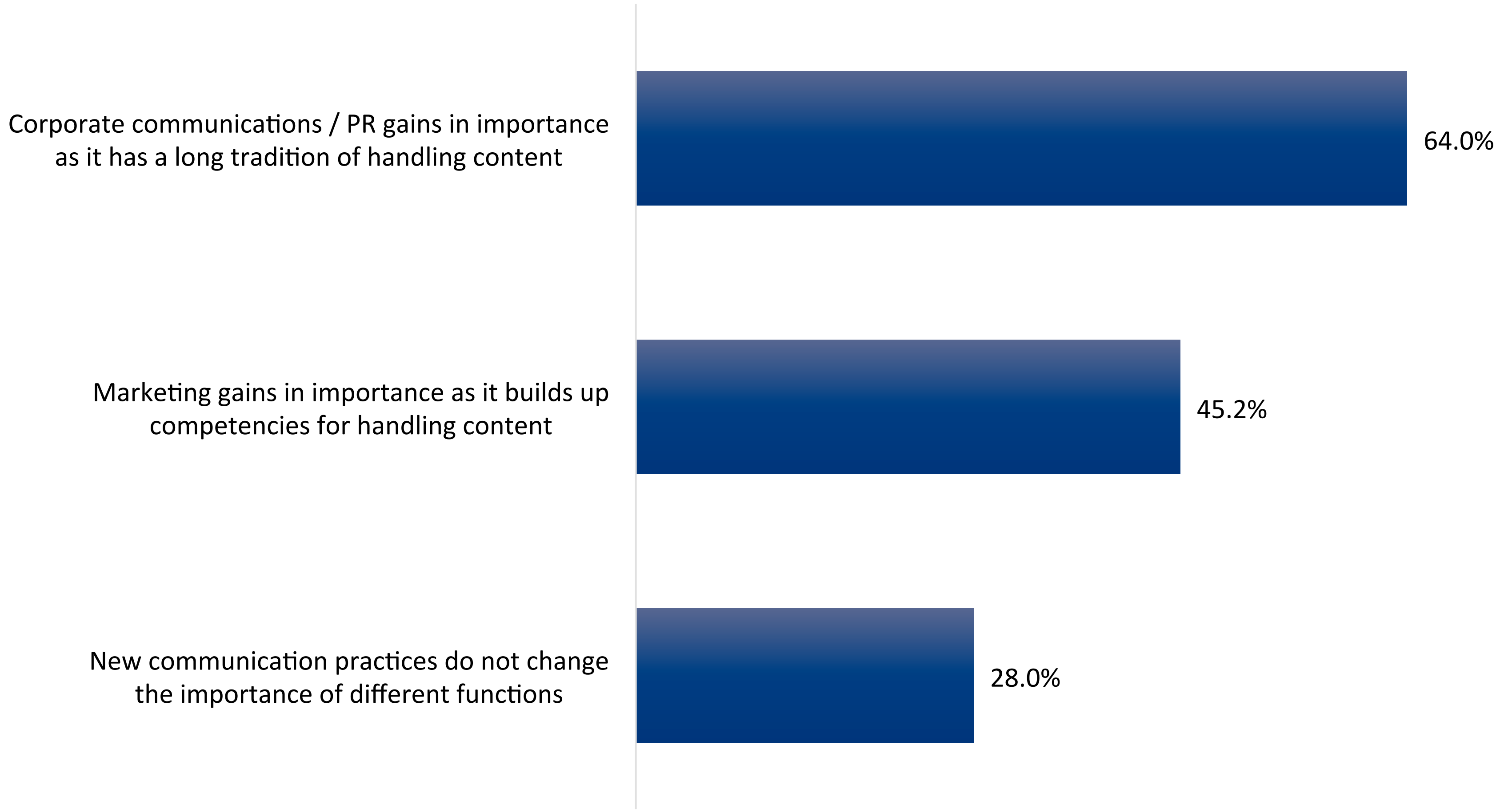
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professionals in communication departments; Q 8. Zerfass et al. 2011 / n = 1,450. Q 17: How closely does the communication function in your organisation work with the … Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5.

Collaboration with marketing, human resources, legal, and other functions differs significantly in various types of organisations



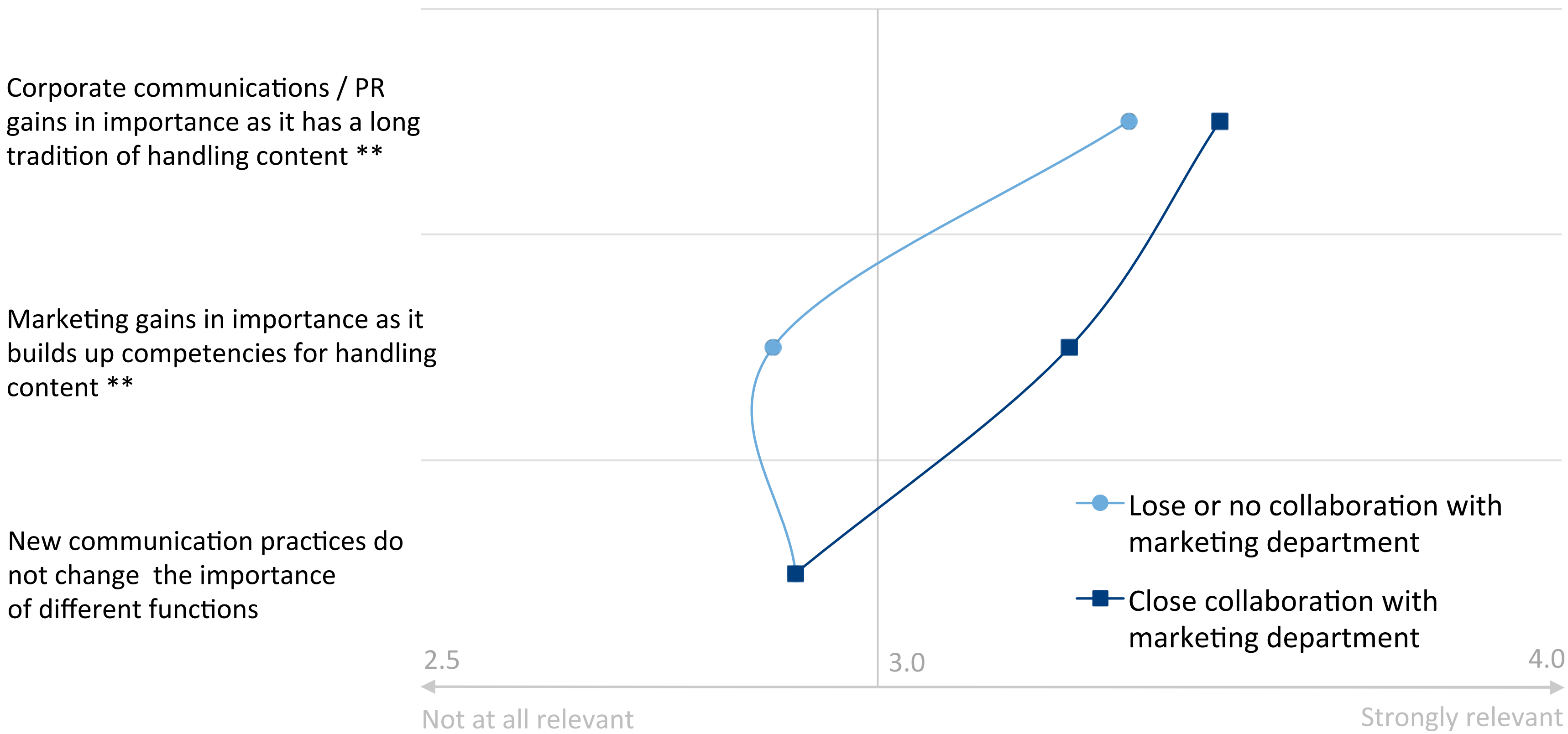
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professionals in communication departments. Q 17: How closely does the communication function in your organisation work with the ... Scale 1 (Never) – 5 (Always). Mean values. ** Highly significant differences (ANOVA/Scheffe post-hoc test, $p \leq 0.01$). * Significant differences (ANOVA/Scheffe post-hoc test, $p \leq 0.05$).

Importance of organisational functions: Most communication professionals believe in their own discipline, and many report a rise of marketing



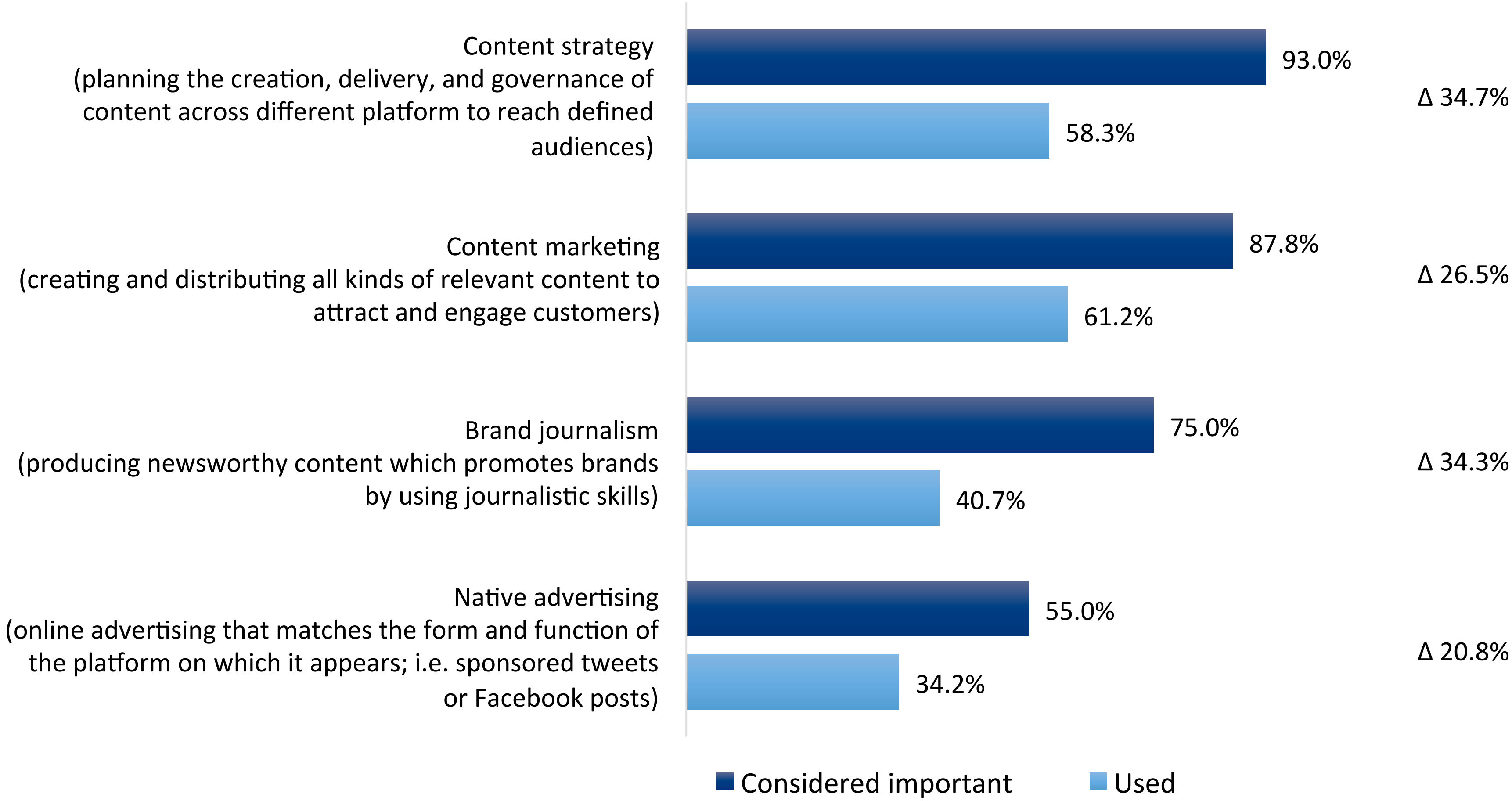
www.communicationmonitor.eu / Zerfass et al. 2015 / n min = 2,212 PR professionals. Q 3: New communication practices might affect the division of work and importance of different communication functions like corporate communications / public relations and marketing. Please state whether you see these trends happening in your organisation or at your clients: Scale 1 (Not at all) – 5 (Very strong). Percentages: Relevance based on scale points 4-5.

Future relevance of marketing functions is rated significantly higher by communication professionals who interact closely with them



www.communicationmonitor.eu / Zerfass et al. 2015 / n min = 1,566 PR professionals working in communication departments. Q 3: New communication practices might affect the division of work and importance of different communication functions like corporate communications / public relations and marketing. Please state whether you see these trends happening in your organisation. Scale 1 (Not at all) – 5 (Very strongly). Q17: How closely does the communication function in your organisation work with the marketing department? Close collaboration based on scale points 4 – 5 on a 5 point scale. Mean values. ** Highly significant differences (Independent sample T-Test, p ≤ 0.01). * Significant differences (Independent sample T-Test, p ≤ 0.05).

Practices of content management and delivery: large gaps between perceived importance and actual use



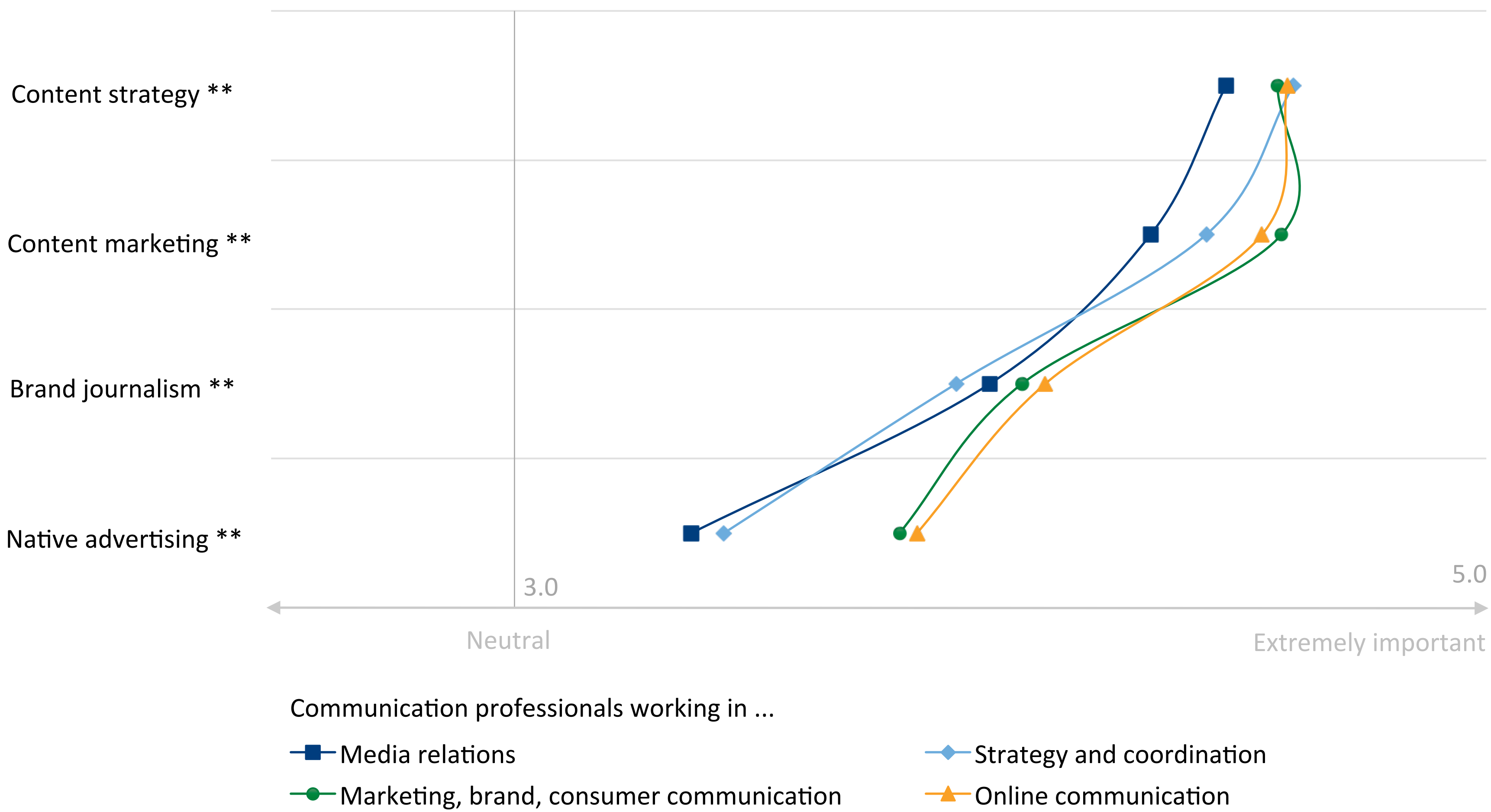
www.communicationmonitor.eu / Zerfass et al. 2015 / n min = 2,210 PR professionals. Q 4: To what extent are the following concepts and practices important or the future of strategic communication in general? Scale 1 (Not at all important) – 5 (Extremely important). Percentages: Important based on scale points 4-5. And what is used or offered by your organisation? (Tick "Used by my organisation")

Assessment of content practices depends heavily on the type of organisation

	Content strategy **			Content marketing **			Brand journalism **			Native advertising **		
	Important	Mean	Used	Important	Mean	Used	Important	Mean	Used	Important	Mean	Used
Joint stock companies	89.7%	4.48	55.1%	87.6%	4.36	59.8%	69.1%	**3.89**	36.9%	57.4%	**3.60**	37.6%
Private companies	90.2%	4.46	52.0%	88.9%	**4.46**	63.2%	66.7%	3.87	40.4%	53.0%	3.53	38.1%
Governmental organisations	81.2%	4.25	51.9%	73.0%	4.00	51.7%	60.7%	3.69	38.4%	46.4%	3.21	28.5%
Non-profit organisations	91.5%	**4.56**	66.8%	86.6%	4.37	65.6%	64.2%	3.78	38.0%	52.3%	3.47	31.2%
Consultancies & Agencies	93.0%	4.62	65.3%	87.8%	4.44	65.3%	75.0%	4.04	46.5%	55.0%	3.59	33.4%

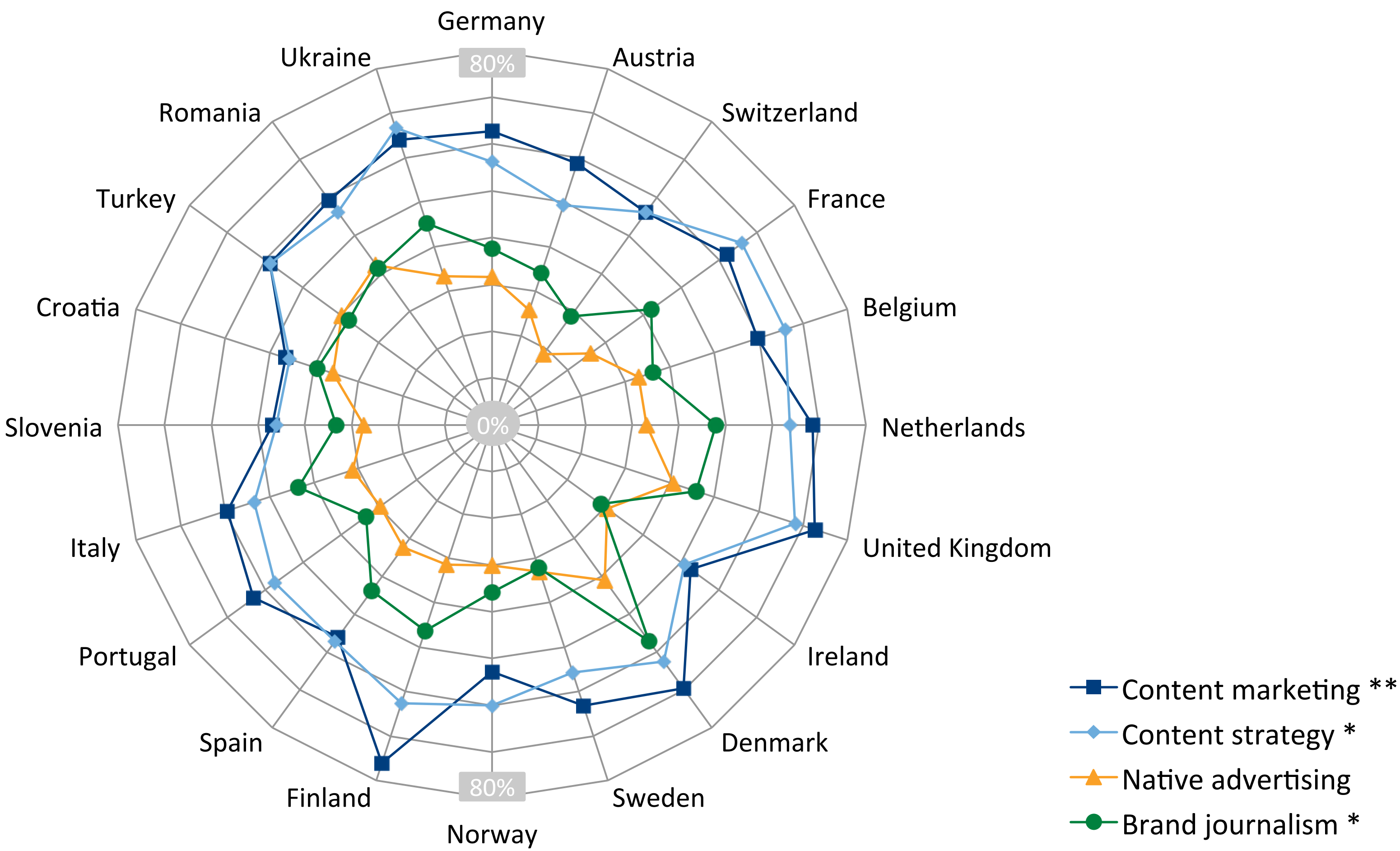
www.communicationmonitor.eu / Zerfass et al. 2015 / n^{min} = 2,210 PR professionals. Q 4: To what extent are the following concepts and practices important for the future of strategic communication in general? Scale 1 (Not at all important) – 5 (Extremely important). Percentages: Important based on scale points 4-5. And what is used or offered by your organisation? ** Highly significant differences (ANOVA/Scheffe post-hoc test, p ≤ 0.01).

Professionals working in marketing or online communication are stronger supporters of modern content practices



www.communicationmonitor.eu / Zerfass et al. 2015 / n min = 2,210 PR professionals. Q 4: To what extent are the following concepts and practices important for the future of strategic communication in general? Scale 1 (Not at all important) – 5 (Extremely important). Mean values. ** Highly significant differences (Independent samples T-Test, p ≤ 0.01).

Use of content practices in different European countries: strong variations in the field of content marketing



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,869 PR professionals from 20 countries. Q 4: To what extent are the following concepts and practices important for the future of strategic communication in general? And what is used or offered by your organisation? (Tick "Used by my organisation")
** Highly significant differences (chi-square test, p ≤ 0.01). * Significant differences (chi-square test, p ≤ 0.05).

Strategic issues and value contribution

Chapter overview

"Linking communication and business strategy" has been identified as the most enduring challenge for communication professionals in previous ECM surveys (Verčič et al., 2014) and academic literature (Steyn, 2007). Each year the European Communication Monitor asks for the most important challenges for communication management in the next three years. Once again, 42.9 per cent of the 2,253 respondents in this year's survey stated that the profession has to tackle the ongoing challenge of linking communication and business strategies. This finding reiterates that the profession is continuing to strive for a strategic position at the decision-making table in order to become a part of the strategic management of an organisation (Cornelissen et al., 2013; Verčič & Grunig 2002).

Looking forward for the next three years to 2018, European communicators regard "Coping with the digital evolution and the social web" as the second most important challenge as it has returned to second place (37.2 per cent) in the list, after dipping to third last year. Meanwhile "Building and maintaining trust" is in the close third position (36.6 per cent). There are, however, very interesting differences between countries: "Linking business strategy and communication" is the hottest issue in Spain, Finland and Ukraine. "Coping with the digital evolution and the social web" is the top issue in Ireland, Belgium, Romania, Turkey and Croatia; "Building and maintaining trust" is the top issue in Slovenia and Sweden; while in France the top issue is "Matching the needs to address more audiences and channels with limited resources".

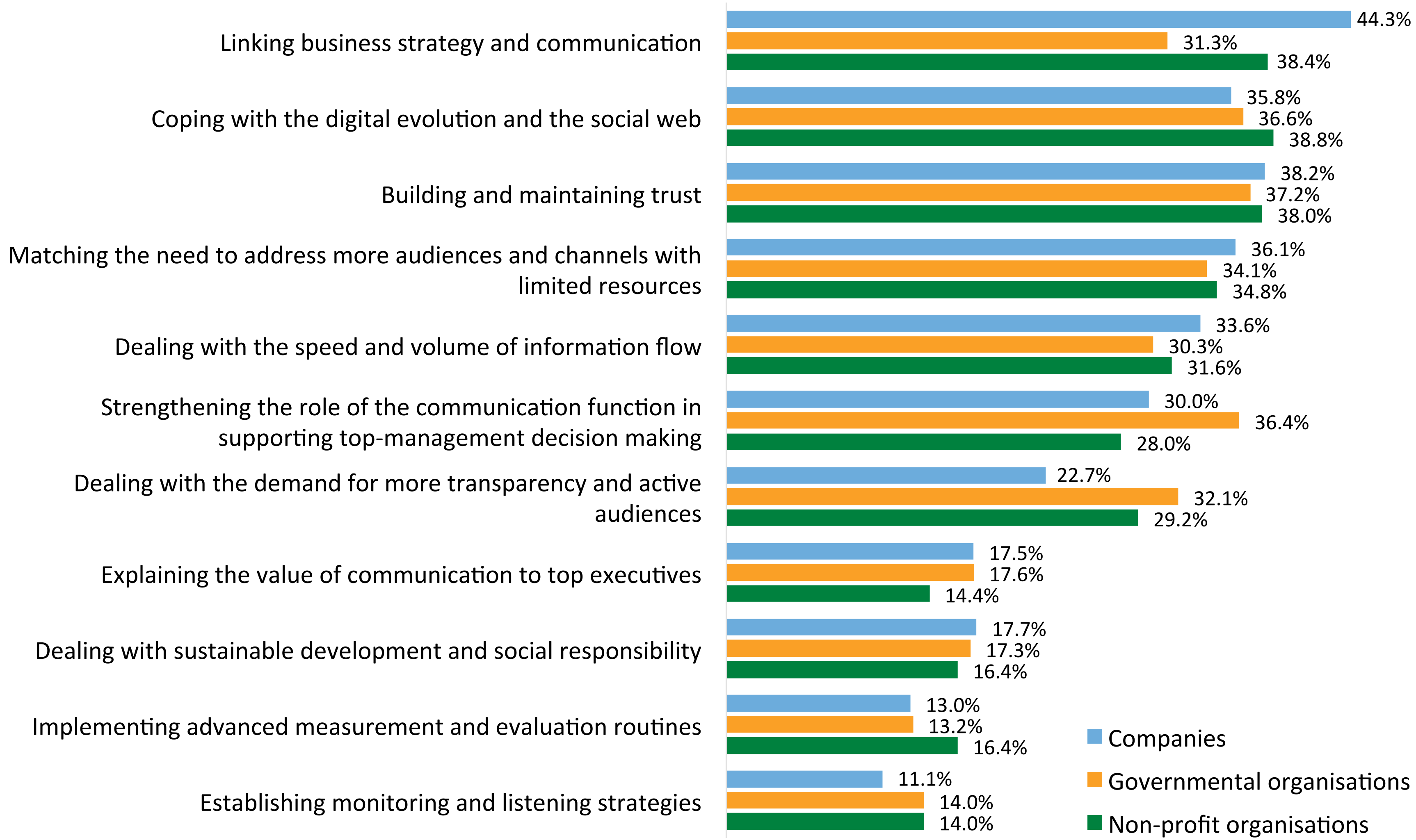
Looking at how communicators and their departments help to reach the overall organisational goals of their organisation or client it is interesting to see how the responses breakdown into inbound and outbound activities. Within these divides communicators see their major role at the outbound in contributing to organisational objectives by building immaterial assets (brands, reputation, culture) and facilitating business processes (influencing customer preferences, motivating employees, generating public attention) and in the inbound by helping to adjust organisational strategies (identifying opportunities, integrating public concerns and collecting customer feedback) and securing room for manoeuvre (by managing relationships and crises, building and securing legitimacy).

Qualitative research among chief communication officers in Germany (Kiesenbauer & Zerfass, 2015) showed that communicators use various strategies to explain what they do and why. When considering how communicators argue for the justification and legitimation of communication to top executives and internal clients there are some interesting results from this survey. The major way the respondents state they argue for the relevance of communication is by explaining the positive effects of good reputation, organisational culture and brands (79.8 per cent). This is followed by illustrating the benefits of listening to stakeholders and identifying opportunities (63.6 per cent); explaining the role of content and "thought leadership" for organisational goals at 56.5 per cent. Only 55.4 per cent claim to demonstrate positive economic consequences of communication activities. However, the measurement and evaluation chapter of this report emphasises the contradiction that what respondents claim to do and what they monitor and measure do not match. The majority of activities reported as contributing to organisational goals are not monitored and measured, and for that reason it may be hard to defend, explain and legitimise them to top decision-makers.

Most important issues for communication management in Europe until 2018

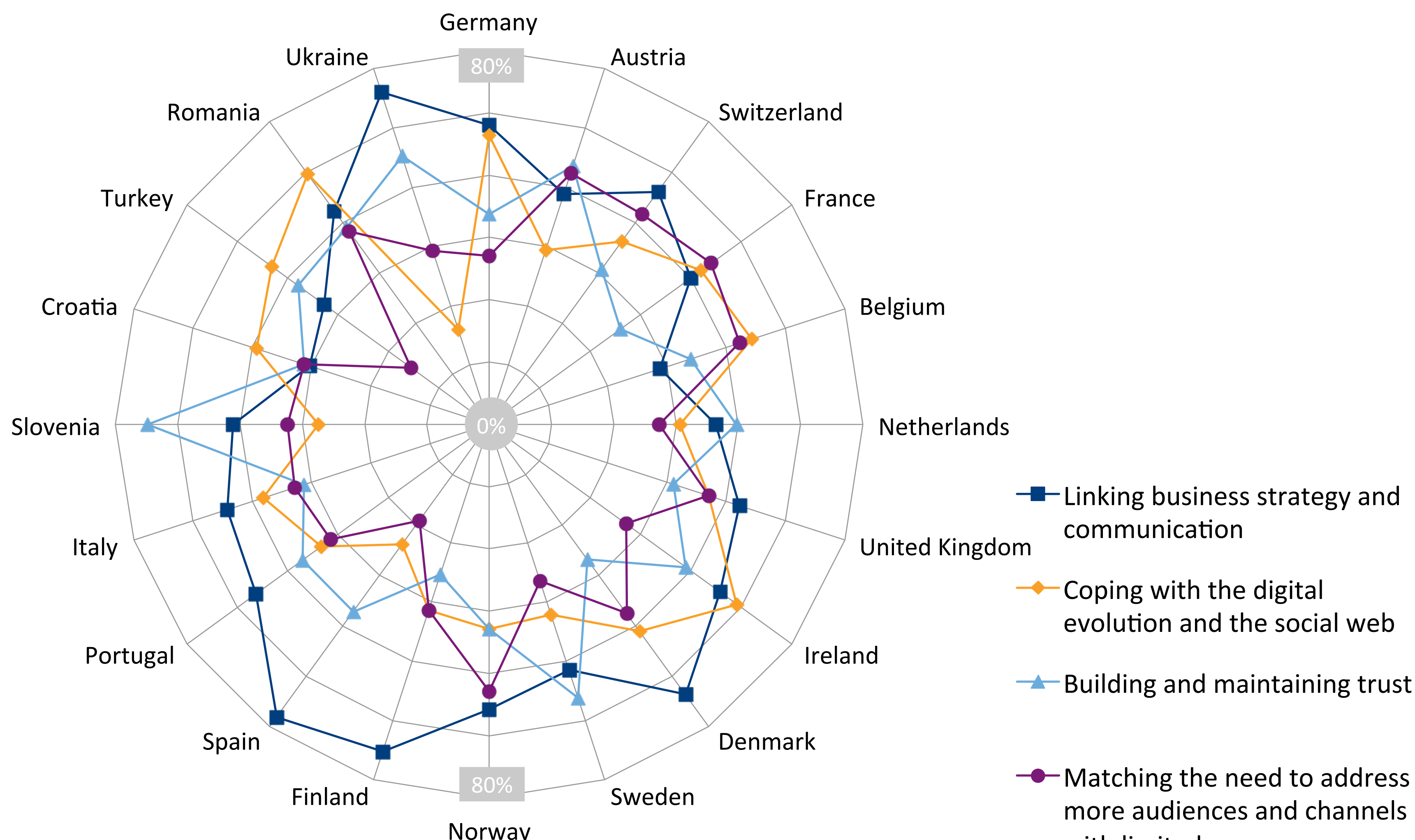
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 2,253 PR professionals. Q 5: Please pick those three (3) issues which you believe will be most important for public relations / communication management within the next three years!

Importance of strategic issues in different types of organisations until 2018



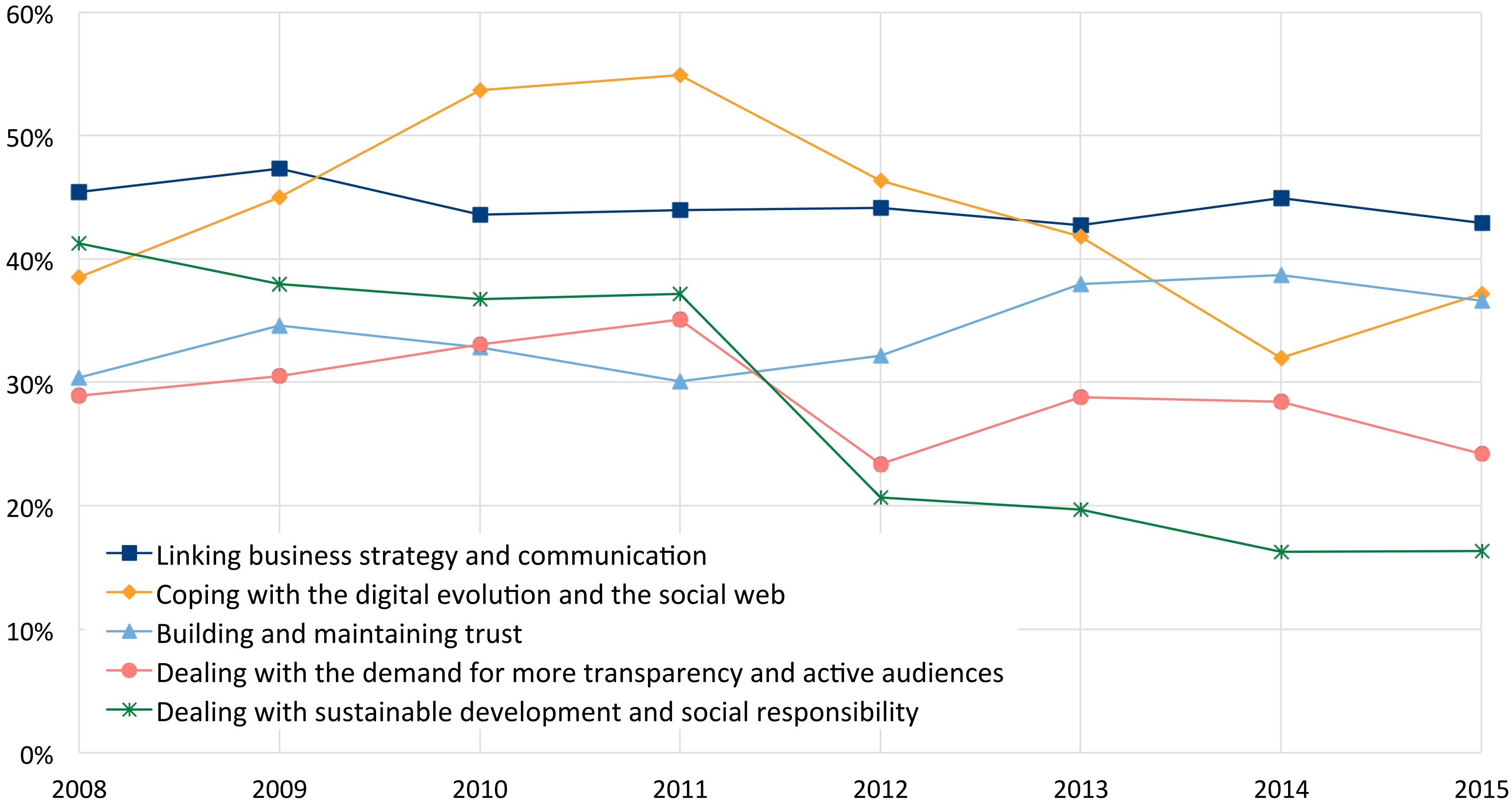
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 2,253 PR professionals. Q 5: Please pick those three (3) issues which you believe will be most important for public relations / communication management within the next three years!

Country-to-country relevance of key issues



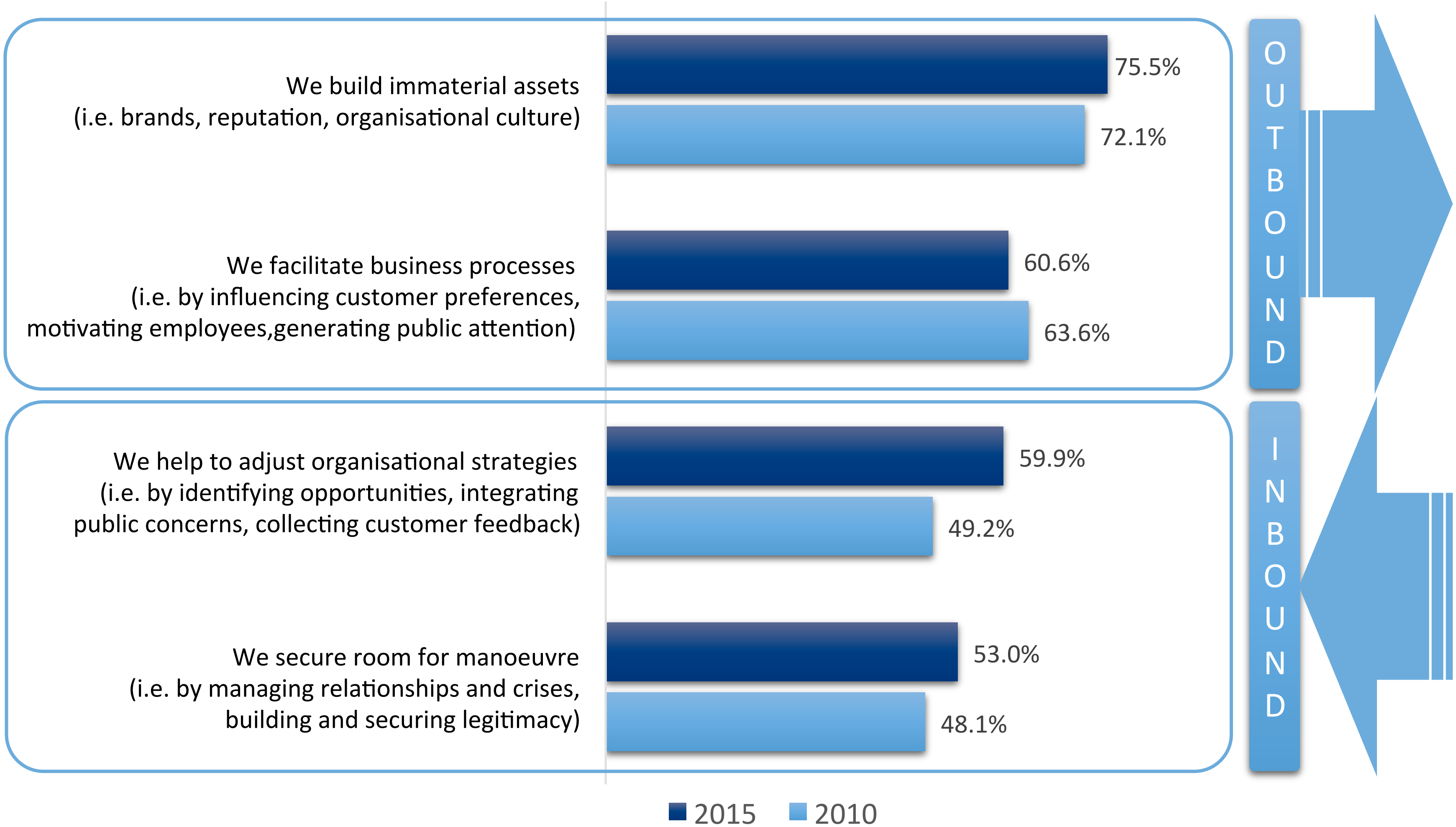
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,893 PR professionals from 20 countries. Q 5: Please pick those three (3) issues which you believe will be most important for public relations / communication management within the next three years!

Top five issues for communication management in Europe since 2008



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 2,253 PR professionals; Q16. Zerfass et al. 2014 / n = 2,777; Q6. Zerfass et al. 2013 / n = 2,710; Q9. Zerfass et al. 2012 / n = 2,185; Q6. Zerfass et al. 2011 / n = 2,209; Q7. Zerfass et al. 2010 / n= 1,955; Q 12. Zerfass et al. 2009 / n = 1,863; Q6. Zerfass et al. 2008 / n = 1,524. Q 5: Please pick those three (3) issues which you believe will be most important for public relations / communication management within the next three years!

Contribution to overall objectives: How communication professionals comprehend their share in reaching organisational goals



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 2,252 PR professionals. Q 7: How do you and your department help to reach the overall goals of your organisation or your client? Scale 1 (Rarely) – 5 (Very often). Percentages: Frequency based on scale points 4-5. Zerfass et al. 2010 / n = 1,955 (Q 9).

Perceived contribution to organisational objectives in different types of organisations – comparative and longitudinal data

	OUTBOUND				INBOUND			
	Building immaterial assets ** (Cramér's V = 0.081)		Facilitating business processes ** (Cramér's V = 0.089)		Helping to adjust organisational strategies ** (Cramér's V = 0.071)		Securing room for manoeuvre ** (Cramér's V = 0.083)	
	2015	2010	2015	2010	2015	2010	2015	2010
Joint stock companies	81.9%	74.3%	66.1%	64.8%	54.9%	45.8%	59.3%	53.0%
Private companies	76.4%	76.0%	63.7%	63.8%	57.1%	42.4%	48.5%	45.0%
Governmental organisations	65.6%	65.2%	46.1%	62.1%	54.7%	50.9%	45.0%	47.6%
Non-profit organisations	72.0%	69.9%	54.4%	61.1%	61.6%	54.4%	44.8%	39.8%
Consultancies & Agencies	76.7%	71.8%	65.0%	64.2%	68.3%	56.4%	58.1%	49.5%

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 2,252 PR professionals. Q 7. Zerfass et al. 2010 / n = 1,955. Q 9: How do you and your department help to reach the overall goals of your organisation or your client? Scale 1 (Rarely) – 5 (Very often). Percentages: Frequency based on scale points 4-5.
** Highly significant differences between types of organisations 2015 (chi-square test, p ≤ 0.01).

Perceived contribution to organisational goals in different European countries

	Building immaterial assets	Facilitating business processes	Helping to adjust organisational strategies	Securing room for manoeuvre
Germany	77.6%	60.7%	54.6%	52.0%
Austria	74.1%	56.5%	47.1%	45.9%
Switzerland	84.6%	45.1%	51.6%	48.4%
France	74.0%	54.0%	46.0%	38.0%
Belgium	70.1%	44.3%	53.6%	48.5%
Netherlands	81.0%	61.2%	62.0%	64.5%
United Kingdom	83.0%	68.1%	56.3%	56.3%
Ireland	66.1%	66.1%	49.2%	67.8%
Denmark	76.8%	64.3%	57.1%	44.6%
Sweden	69.8%	53.8%	58.5%	53.8%

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,892 PR professionals from 20 countries. Q 7: How do you and your department help to reach the overall goals of your organisation or your client? Scale 1 (Rarely) – 5 (Very often). Percentages: Frequency based on scale points 4-5.

Perceived contribution to organisational goals in different European countries

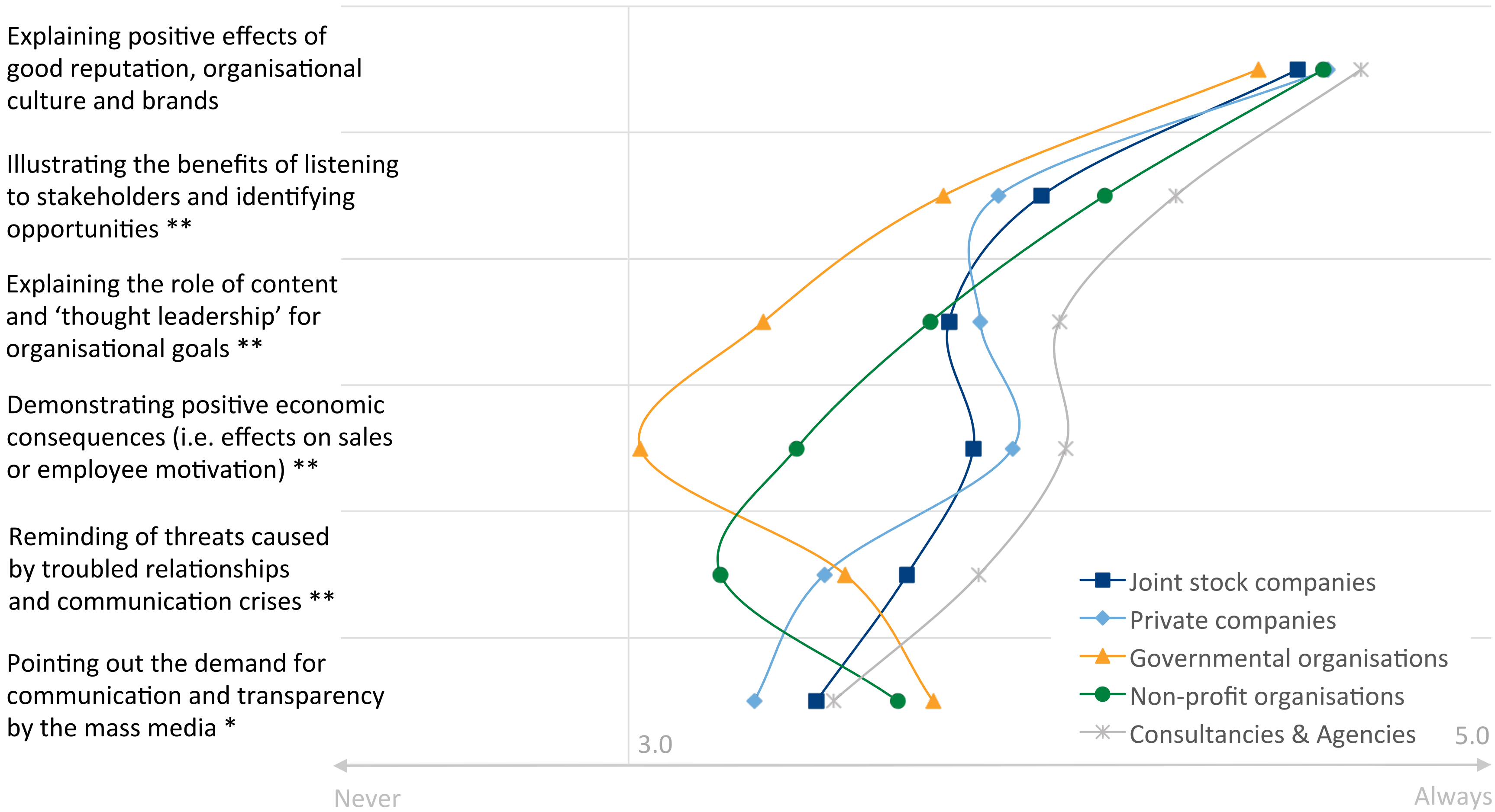
	Building immaterial assets	Facilitating business processes	Helping to adjust organisational strategies	Securing room for manoeuvre
Norway	61.4%	50.0%	51.4%	45.7%
Finland	78.8%	69.7%	66.7%	62.1%
Spain	76.2%	65.7%	64.8%	57.1%
Portugal	75.9%	64.8%	66.7%	63.0%
Italy	80.2%	62.6%	59.5%	42.7%
Slovenia	68.6%	64.7%	59.8%	40.2%
Croatia	67.0%	60.7%	58.0%	51.8%
Turkey	77.6%	74.1%	70.7%	67.2%
Romania	79.7%	59.3%	66.7%	52.0%
Ukraine	76.0%	70.7%	65.3%	64.0%

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,892 PR professionals from 20 countries. Q 7: How do you and your department help to reach the overall goals of your organisation or your client? Scale 1 (Rarely) – 5 (Very often). Percentages: Frequency based on scale points 4-5.

Explaining communication value: How professionals argue for the relevance of communication to top executives or (internal) clients

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 2,253 PR professionals. Q 6: How do you usually argue for the relevance of strategic communication when addressing top executives and (internal) clients? Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5.

Explaining the value of communication: clear differences between various types of organisations



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 2,253 PR professionals. Q 6: How do you usually argue for the relevance of strategic communication when addressing top executives and (internal) clients? Scale 1 (Never) – 5 (Always). Mean values. ** Highly significant differences (ANOVA/Scheffe post-hoc test, p ≤ 0.01). * Significant differences (ANOVA/Scheffe post-hoc test, p ≤ 0.05).

Communication value explained by professionals working in companies

	Explaining positive effects of good reputation, organisational culture and brands	Illustrating the benefits of listening to stakeholders and identifying opportunities	Explaining the role of content and 'thought leadership' for organisational goals	Demonstrating positive economic consequences	Reminding of threats caused by troubled relation-ships and commu-nication crises	Pointing out the demand for communication and transparency by the mass media
Germany	77.1%	57.8%	64.2%	55.0%	54.1%	31.2%
Austria	82.1%	64.3%	50.0%	53.6%	39.3%	39.3%
Switzerland	86.5%	61.5%	57.7%	48.1%	46.2%	42.3%
France	76.9%	57.7%	61.5%	53.8%	57.7%	46.2%
Belgium	76.9%	73.1%	80.8%	57.7%	50.0%	57.7%
Netherlands	82.2%	57.8%	57.8%	42.2%	37.8%	26.7%
United Kingdom	90.6%	60.4%	54.7%	66.0%	62.3%	35.8%
Ireland	68.8%	62.5%	43.8%	56.3%	37.5%	50.0%
Denmark	83.3%	62.5%	37.5%	66.7%	25.0%	41.7%
Sweden	66.7%	48.5%	57.6%	45.5%	39.4%	54.5%

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 809 PR professionals from 20 countries working in companies. Q 6: How do you usually argue for the relevance of strategic communication when addressing top executives and (internal) clients? Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5.

Communication value explained by professionals working in companies

	Explaining positive effects of good reputation, organisational culture and brands	Illustrating the benefits of listening to stakeholders and identifying opportunities	Explaining the role of content and 'thought leadership' for organisational goals	Demonstrating positive economic consequences	Reminding of threats caused by troubled relation-ships and commu-nication crises	Pointing out the demand for communication and transparency by the mass media
Norway	73.7%	57.9%	31.6%	57.9%	42.1%	42.1%
Finland	86.2%	62.1%	62.1%	69.0%	55.2%	44.8%
Spain	75.5%	53.1%	51.0%	73.5%	46.9%	53.1%
Portugal	77.8%	77.8%	55.6%	48.1%	66.7%	66.7%
Italy	83.1%	69.2%	50.8%	58.5%	50.8%	41.5%
Slovenia	73.3%	53.3%	64.4%	66.7%	44.4%	51.1%
Croatia	71.7%	58.7%	50.0%	52.2%	47.8%	54.3%
Turkey	91.3%	65.2%	69.6%	60.9%	69.6%	56.5%
Romania	81.0%	65.5%	62.1%	77.6%	51.7%	56.9%
Ukraine	80.6%	55.6%	61.1%	50.0%	69.4%	66.7%

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 809 PR professionals from 20 countries working in companies. Q 6: How do you usually argue for the relevance of strategic communication when addressing top executives and (internal) clients? Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5.

Communication strategies and organisational listening

Chapter overview

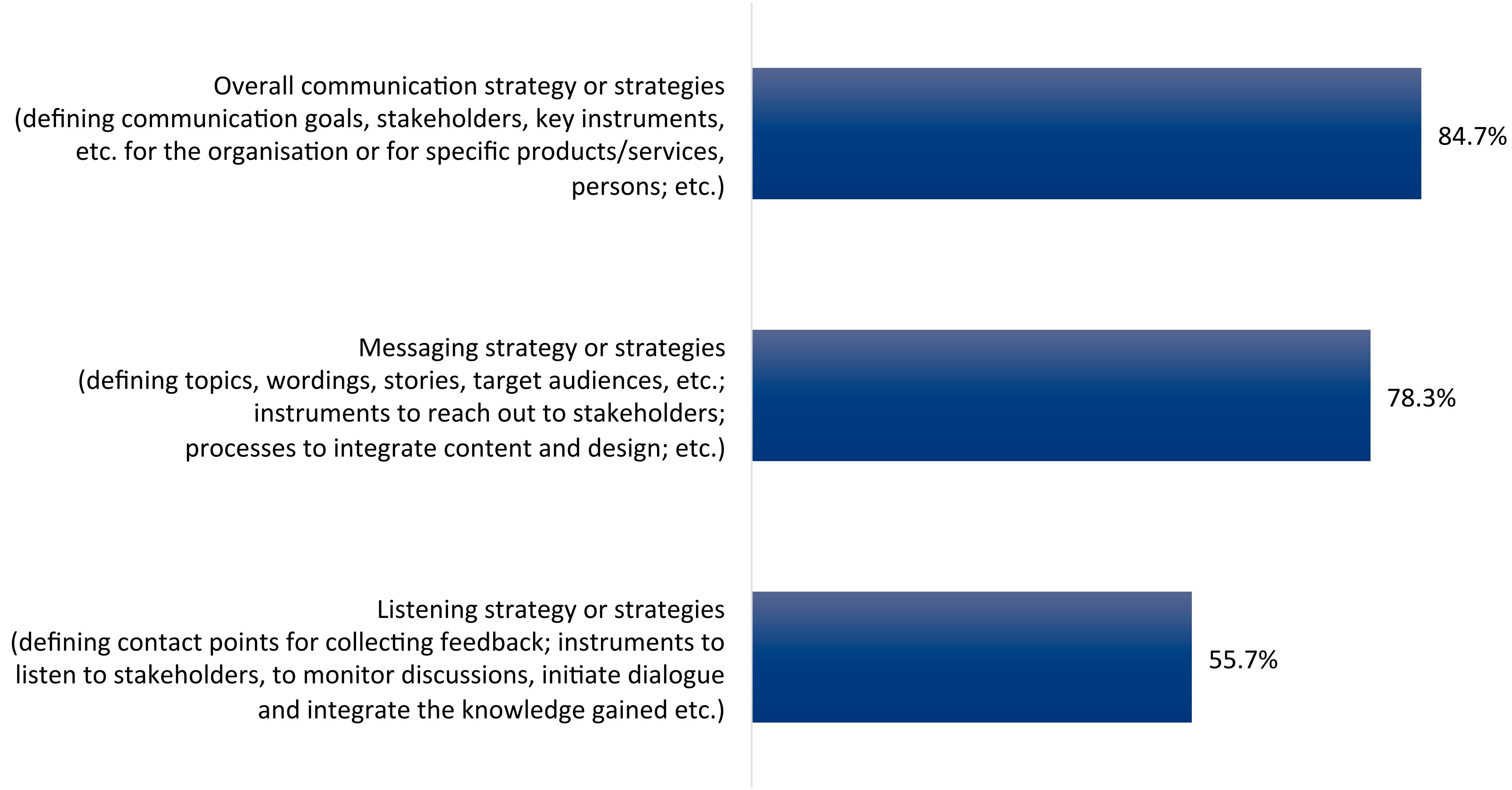
While listening to stakeholders and identifying opportunities is the second most important way in which communicators argue for their relevance towards their superiors, in many organisations listening strategies are often neglected. Macnamara (2013, 2014c) has identified the need to create and maintain audiences and the “work of listening”, which become all the more challenging in an environment of simultaneous audience fragmentation and proliferating media channels and speakers. Pestana and Daniels (2011) highlighted the importance of research, measurement and listening for dialogue and stakeholder engagement, and Willis (2012) underlined the relevance of face-to-face communication for community engagement. While 84.7 per cent of organisations in this study have an overall communication strategy and nearly 78.3 per cent a messaging strategy or strategies, only 55.6 per cent have also developed an organisational listening strategy or strategies. The most active listeners are joint stock (62.9 per cent) and private (56.8 per cent) companies and the least are governmental organisations (47.9 per cent). There are also significant differences between countries.

The most important structures and techniques for organisational listening are media monitoring on a regular basis (in 84.1 per cent), social media monitoring (68.3 per cent), ad hoc listening activities (58.2 per cent), issues monitoring and management (58.0 per cent) and regular dialogues with stakeholders (53.3 per cent). It is clear from the findings that joint stock companies lead the way in the practice of organisational listening.

The respondents of the ECM 2015, who are mainly coming from the corporate communications and public relations field, see themselves in the dominant role in organisational listening. When asked to rate the forerunners in organisational listening they posted firstly the corporate communications/ public relations department (76.4 per cent), second the marketing / sales functions (49.7%) and thirdly customer relations (45.4 per cent). There were some regional differences with marketing and sales reporting higher importance in France, Finland and Turkey.

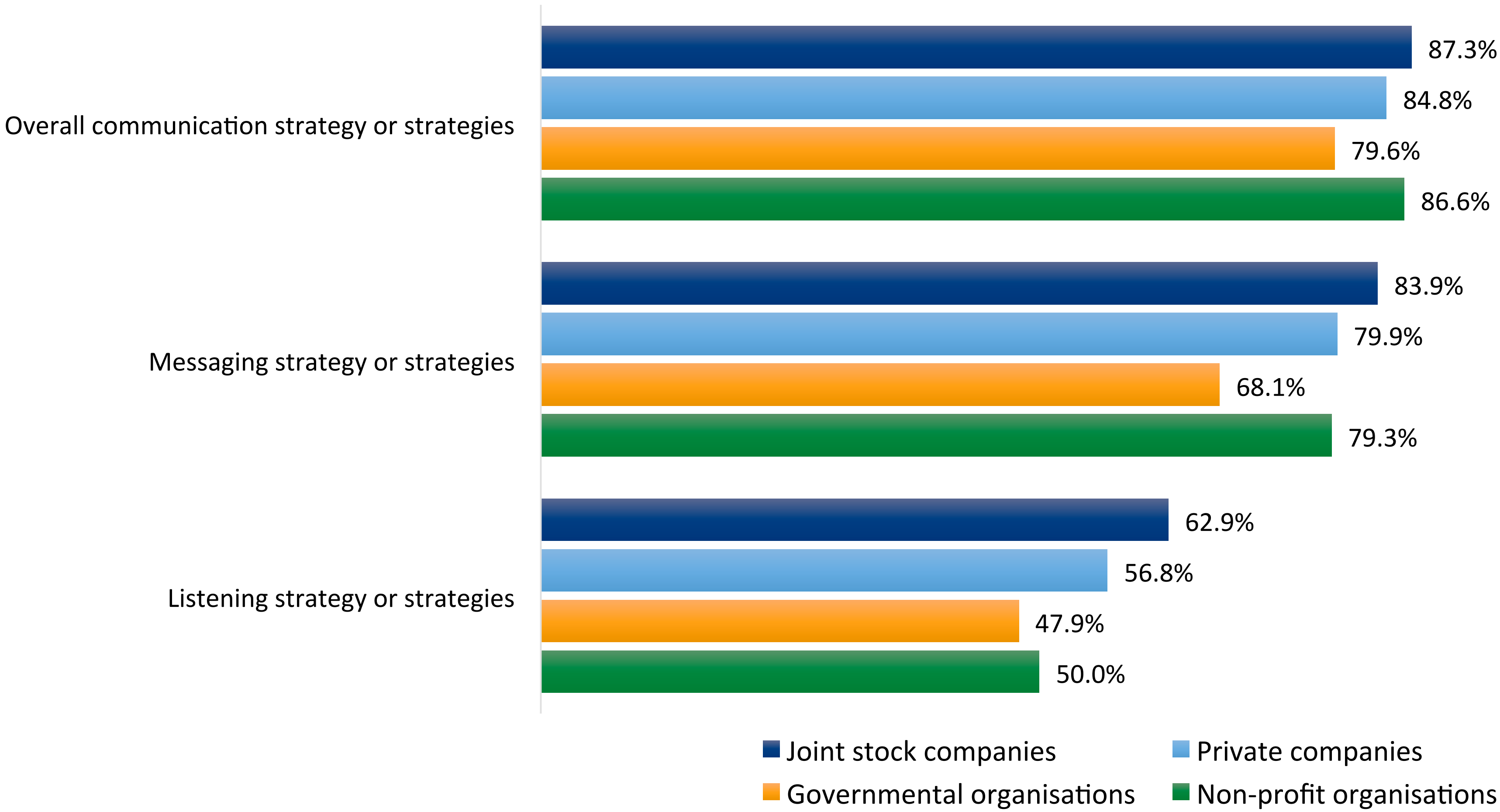
An in-depth analysis into the identification of listening-minded communication departments (based on their mindsets and structures) shows that 18.9 per cent of departments can be labelled as being ahead of the rest: they are better in contributing to overall objectives by identifying opportunities, in explaining communication value though the benefits of listening, in implementing listening strategies and in spearheading listening within the organisation. The main differentiating aspect is that they are making listening tasks an explicit objective for the communication function (62.0 per cent of listening-minded communication departments versus 31.5 per cent of other departments). Listening tasks are also more often a part of the communicators’ job description (in 64.5 per cent of listening-minded against 33.4 per cent in other communication functions). Other major differences are in conducting stakeholder research on a regular basis (63.1 per cent against 37.8 per cent), issues monitoring and management (77.8 per cent against 52.8 per cent), and leading stakeholder dialogue on a regular basis (69.9 per cent against 48.9 per cent). The difference between listening-minded and other communication functions is the smallest in social media monitoring on a regular basis (77.4 per cent against 66.2 per cent).

Communication strategies implemented by communication departments: overall plans and messaging are prevalent, listening is often neglected



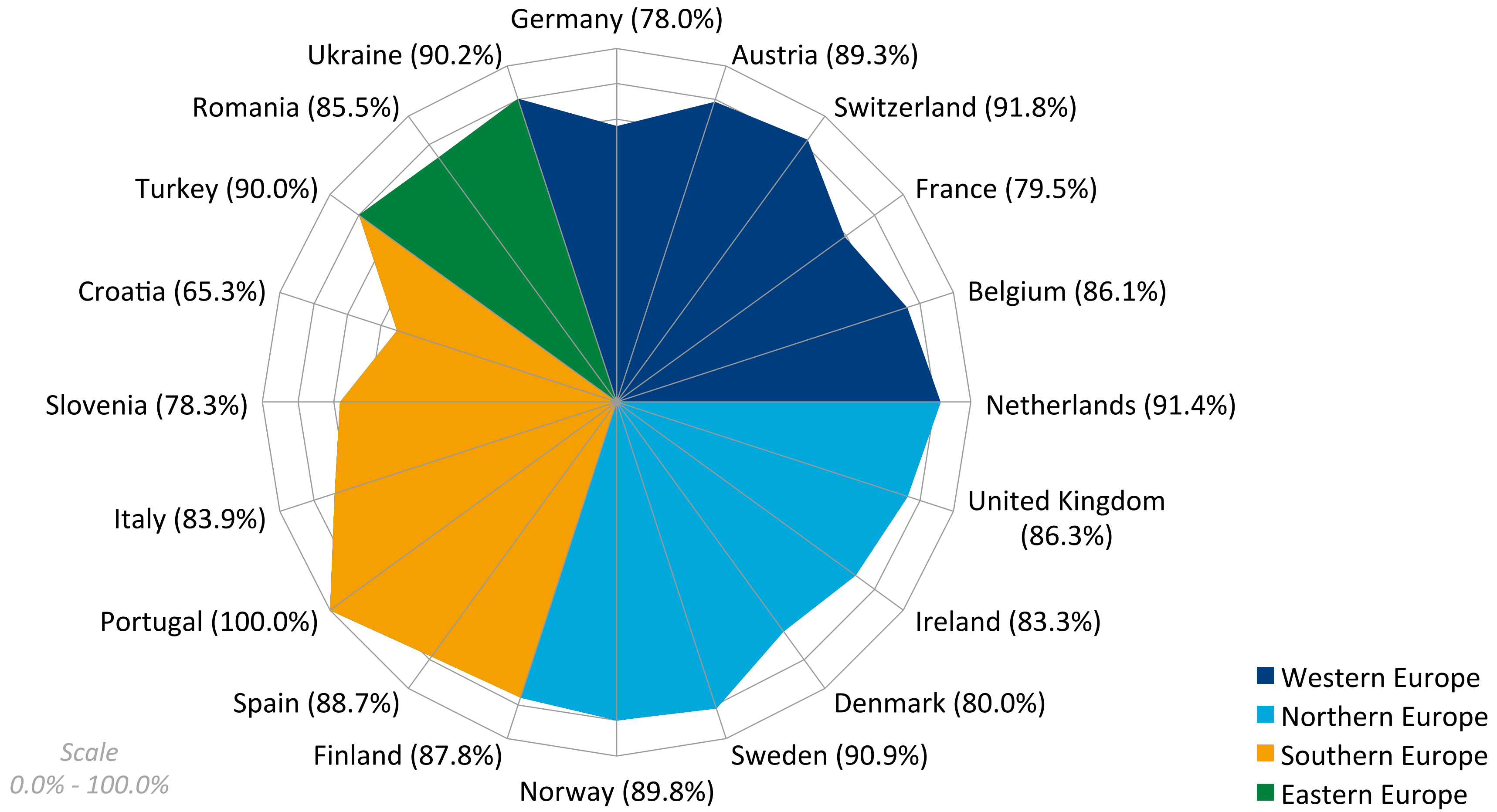
www.communicationmonitor.eu / Zerfass et al. 2015 / n^{min} = 1,487 PR professionals in communication departments. Q 8: Does your organisation have one or more of the following strategies? Scale 1 (Yes) – 2 (No) – 3 (Don't know). Percentages: Based on agreement to each item.

Communication strategies used by different types of organisations



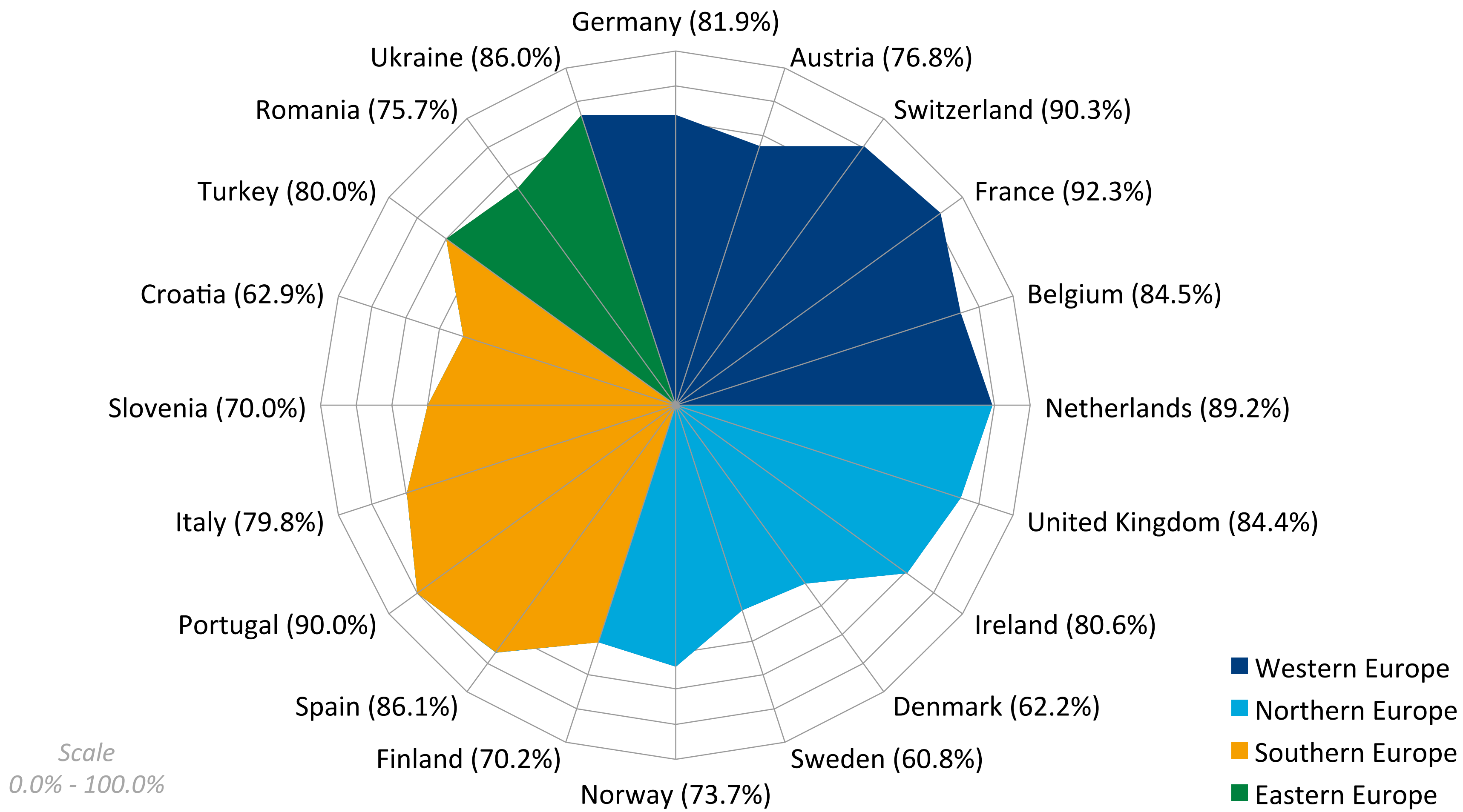
www.communicationmonitor.eu / Zerfass et al. 2015 / n ^{min} = 1,487 PR professionals in communication departments. Q 8: Does your organisation have one or more of the following strategies? Scale 1 (Yes) – 2 (No) – 3 (Don't know). Percentages: Based on agreement to each item. Highly significant differences for all items (chi-square test, p ≤ 0.01).

Country-to-country analysis: implementation of overall communication strategies



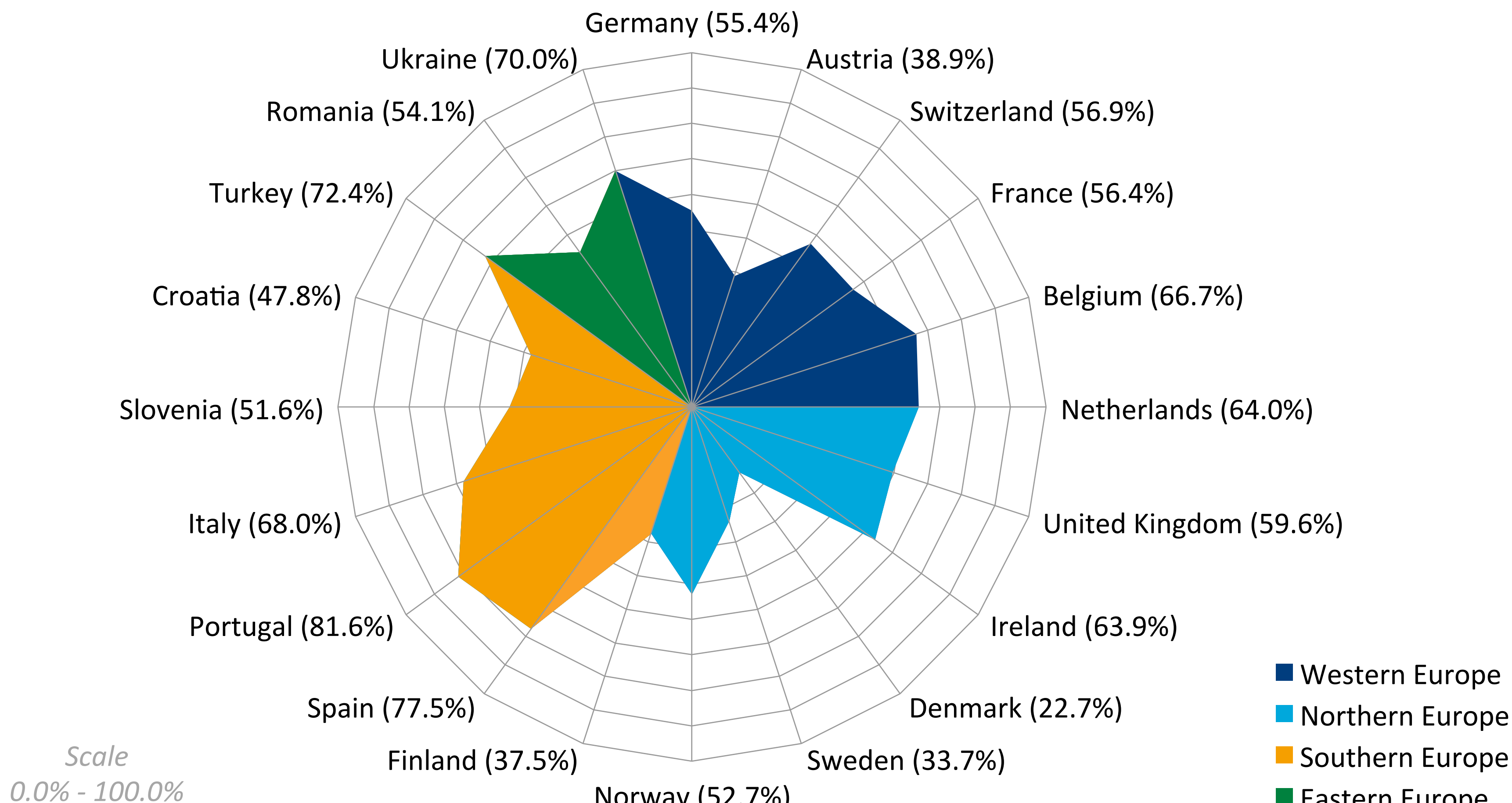
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,330 PR professionals from 20 countries in communication departments. Q 8: Does your organisation have one or more of the following strategies? Item: Overall communication strategy or strategies (defining communication goals, stakeholders, key instruments, etc. for the organisation or for specific products/services, persons; etc.). Percentages: Based on agreement.

Country-to-country analysis: implementation of messaging strategies



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,319 PR professionals from 20 countries in communication departments. Q 8: Does your organisation have one or more of the following strategies? Item: Messaging strategy or strategies (defining topics, wordings, stories, target audiences, etc.; instruments to reach out to stakeholders; processes to integrate content and design; etc.). Percentages: Based on agreement. Highly significant differences (chi-square test, $p \leq 0.01$).

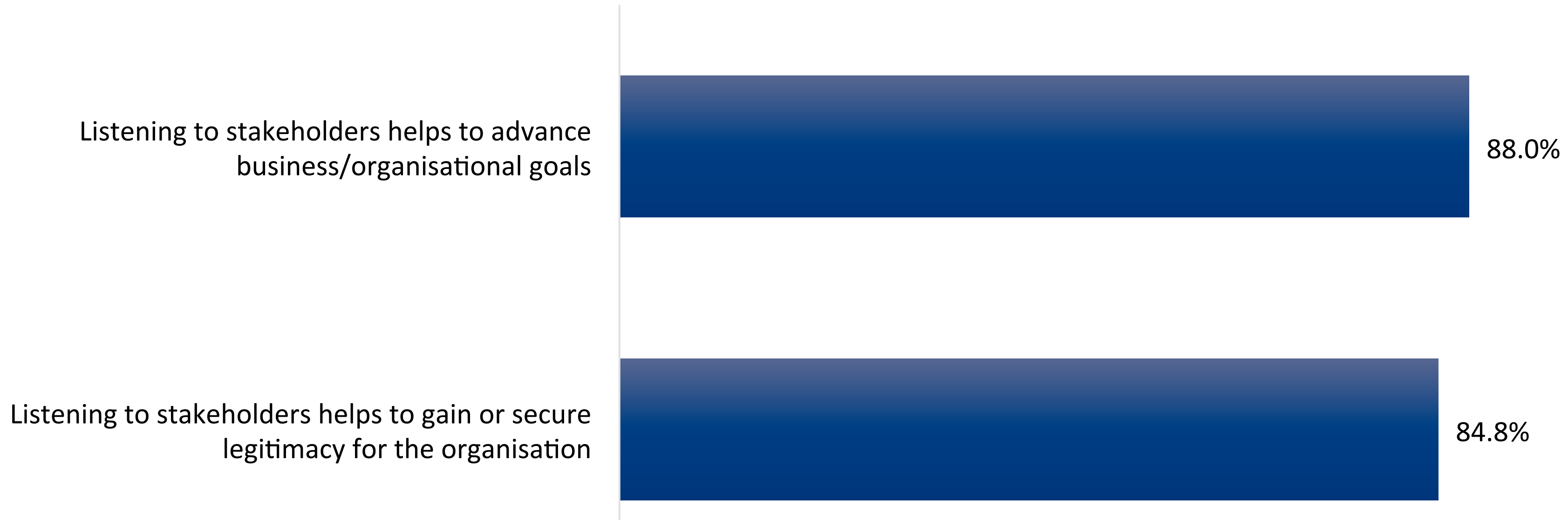
Country-to-country analysis: implementation of listening strategies



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,276 PR professionals from 20 countries working communication departments. Q 8: Does your organisation have one or more of the following strategies? Item: Listening strategy or strategies (defining contact points for collecting feedback; instruments to listen to stakeholders, to monitor discussions, initiate dialogue and integrate the knowledge gained; etc.). Percentages: Based on agreement to each item. Highly significant differences (chi-square test, p ≤ 0.01).

Organisational listening: communication professionals see major benefits both for advancing business goals and securing legitimacy

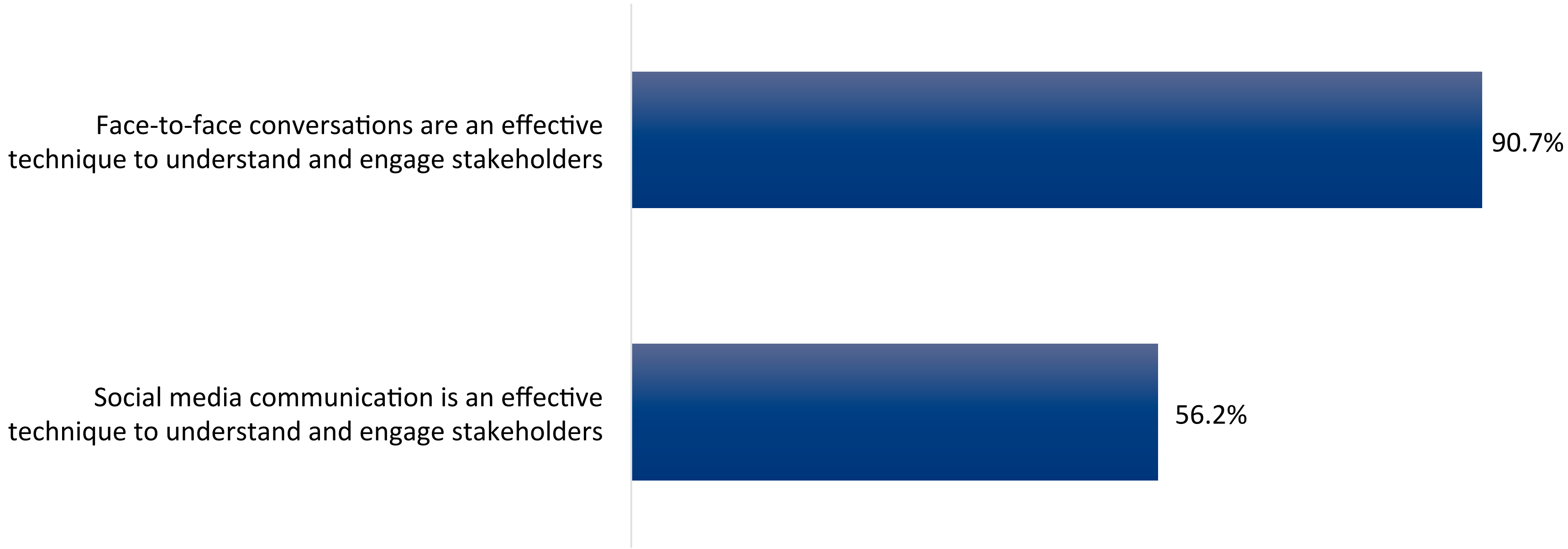
Objectives of organisational listening



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professionals in communication departments. Q 11: Please state whether you agree or disagree with these statements. Scale 1 (Strongly disagree) – 5 (Strongly agree). Percentages: Agreement based on scale points 4-5.

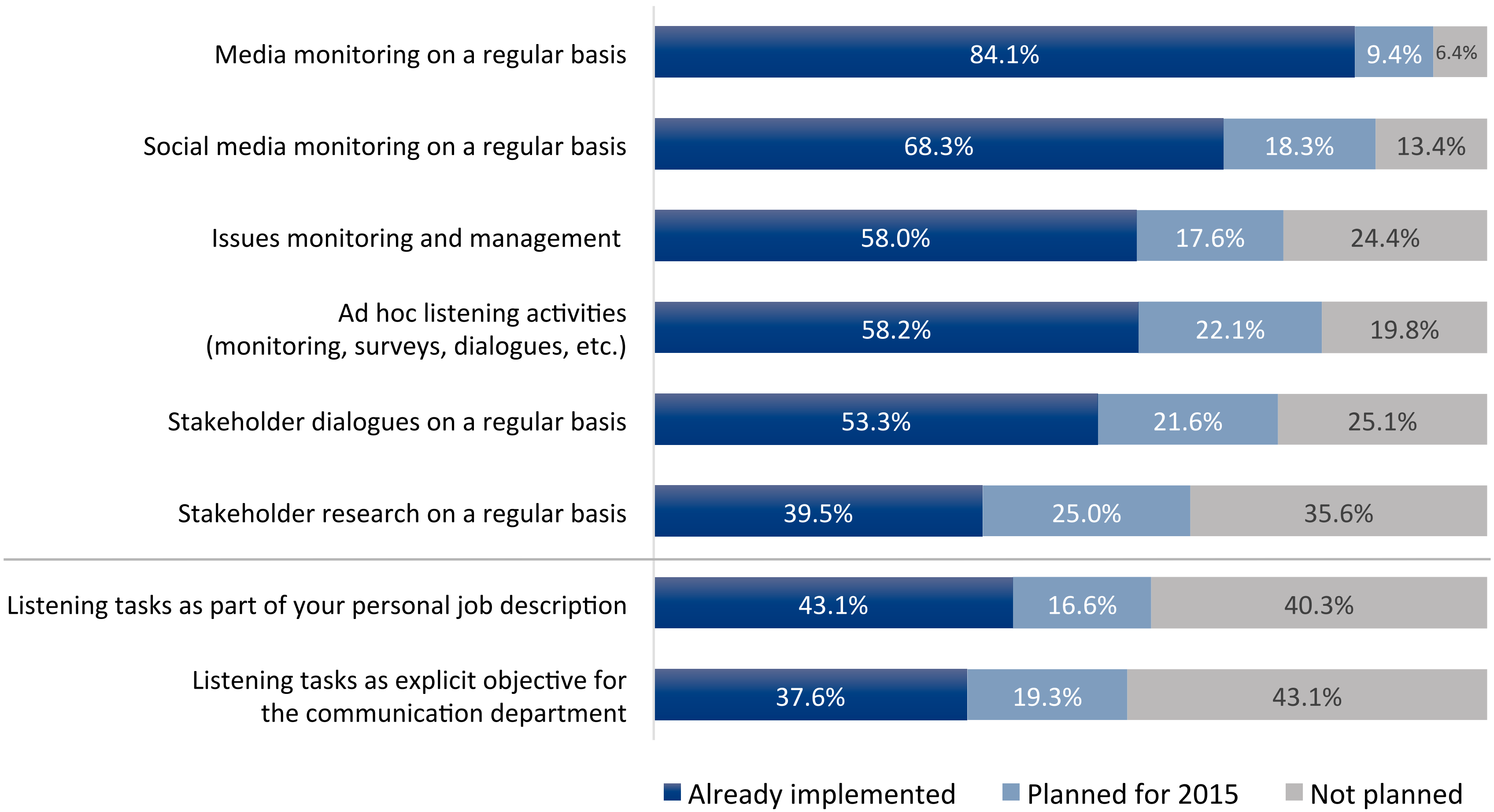
Engaging stakeholders through organisational listening: face-to-face communication is favoured; social media is rated less effective

Means of organisational listening



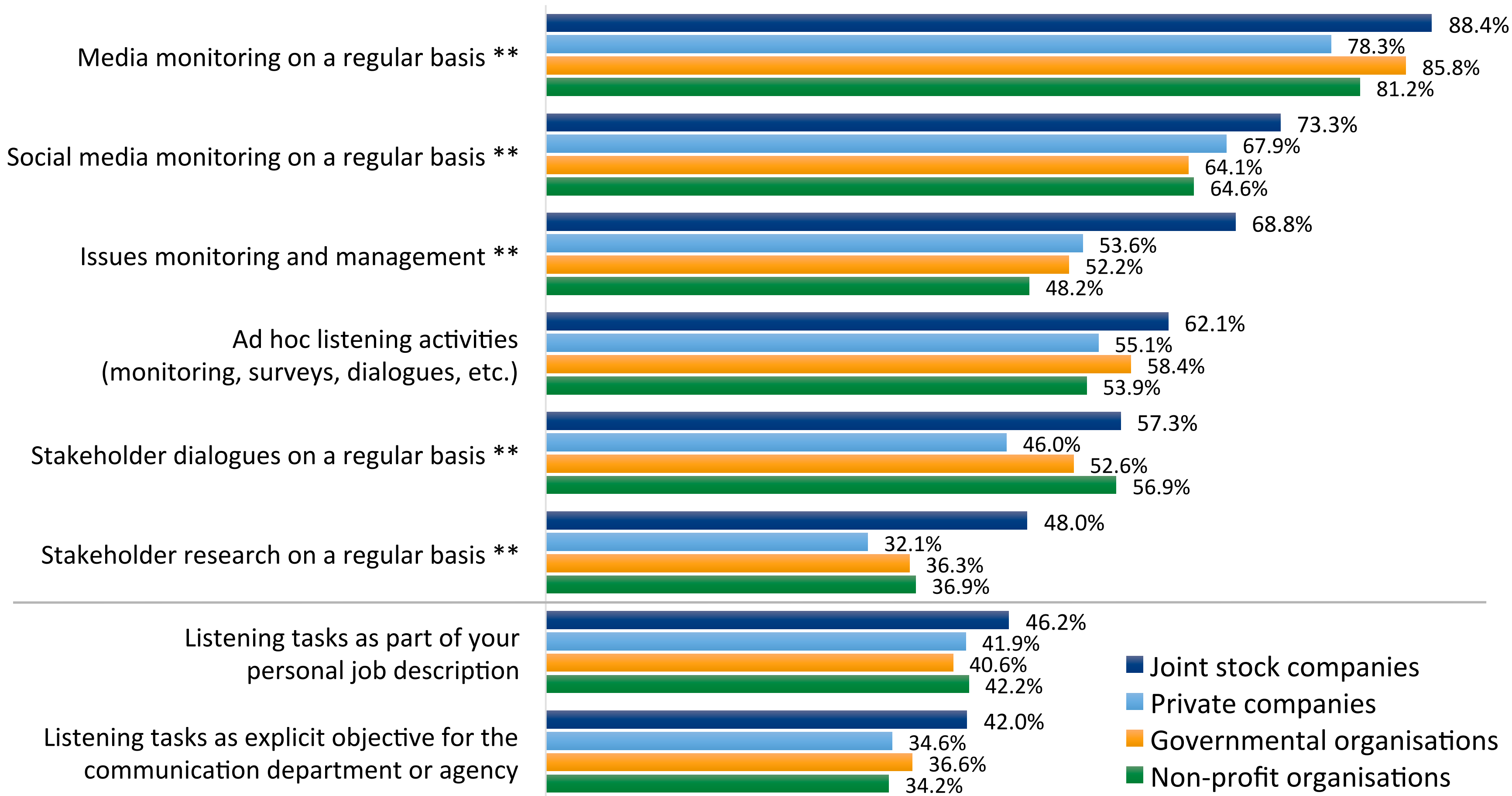
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professionals in communication departments. Q 11: Please state whether you agree or disagree with these statements. Scale 1 (Strongly disagree) – 5 (Strongly agree). Percentages: Agreement based on scale points 4-5.

Structures and techniques for organisational listening: Traditional instruments are prevailing, responsibilities are not always assigned



Organisational listening in different types of organisations: joint stock companies are clearly ahead

Structures and techniques implemented



www.communicationmonitor.eu / Zerfass et al. 2015 / n min = 1,406 PR professionals in communication departments. Q 10: Which of the following have been implemented in your organisation or are planned for 2015? Percentages: agreement to implementation of each item. ** Highly significant differences (chi-square test, p ≤ 0.01).

Country-to-country analysis: structures and techniques for organisational listening implemented in communication departments

	Listening tasks as part of your personal job description	Listening tasks as explicit objective for the communication department **	Media monitoring on a regular basis	Social media monitoring on a regular basis	Stakeholder research on a regular basis **	Stakeholder dialogues on a regular basis **	Issues monitoring and management	Ad hoc listening activities *
Germany	32.5%	39.2%	90.6%	72.2%	37.5%	49.1%	64.1%	62.2%
Austria	39.2%	36.0%	96.4%	53.7%	31.9%	43.1%	49.0%	56.9%
Switzerland	38.8%	46.3%	89.3%	56.9%	31.9%	58.0%	66.2%	68.7%
France	38.2%	30.3%	80.6%	61.5%	28.1%	44.1%	61.8%	55.6%
Belgium	53.4%	44.1%	80.6%	76.7%	38.8%	59.7%	53.7%	57.1%
Netherlands	45.9%	34.8%	88.0%	80.4%	54.0%	55.1%	65.2%	72.2%
United Kingdom	47.2%	40.2%	90.7%	82.5%	48.9%	62.6%	64.8%	60.2%
Ireland	34.3%	26.5%	77.8%	66.7%	33.3%	62.9%	71.4%	41.7%
Denmark	15.9%	14.6%	80.0%	57.8%	22.0%	56.1%	43.9%	56.8%
Sweden	33.0%	23.0%	85.0%	71.1%	42.9%	58.1%	50.0%	57.4%

www.communicationmonitor.eu / Zerfass et al. 2015 / n^{min} = 1,203 PR professionals from 20 countries working in communication departments. Q 10: Which of the following have been implemented in your organisation or are planned for 2015? Percentages: agreement to implementation of each item. ** Highly significant differences (chi-square test, p ≤ 0.01). * Significant differences (chi-square test, p ≤ 0.05).

Country-to-country analysis: structures and techniques for organisational listening implemented in communication departments

	Listening tasks as part of your personal job description	Listening tasks as explicit objective for the communication department **	Media monitoring on a regular basis	Social media monitoring on a regular basis	Stakeholder research on a regular basis **	Stakeholder dialogues on a regular basis **	Issues monitoring and management	Ad hoc listening activities *
Norway	39.6%	51.0%	94.8%	73.7%	36.0%	58.3%	43.8%	64.3%
Finland	31.1%	37.2%	79.6%	75.5%	39.1%	44.7%	45.5%	59.6%
Spain	54.9%	50.7%	76.7%	63.0%	35.9%	47.8%	52.9%	50.0%
Portugal	61.1%	50.0%	85.0%	55.3%	54.1%	51.4%	69.4%	59.5%
Italy	39.8%	40.7%	79.8%	70.6%	42.9%	50.6%	48.1%	42.5%
Slovenia	47.7%	42.1%	77.1%	60.9%	45.5%	61.1%	57.6%	67.7%
Croatia	38.6%	29.9%	73.0%	53.4%	32.8%	54.9%	43.9%	50.7%
Turkey	63.3%	46.4%	86.7%	63.3%	44.8%	33.3%	55.6%	44.4%
Romania	50.7%	39.4%	72.4%	68.0%	39.7%	57.6%	58.9%	52.0%
Ukraine	52.4%	33.3%	81.0%	69.0%	40.0%	51.2%	65.0%	53.7%

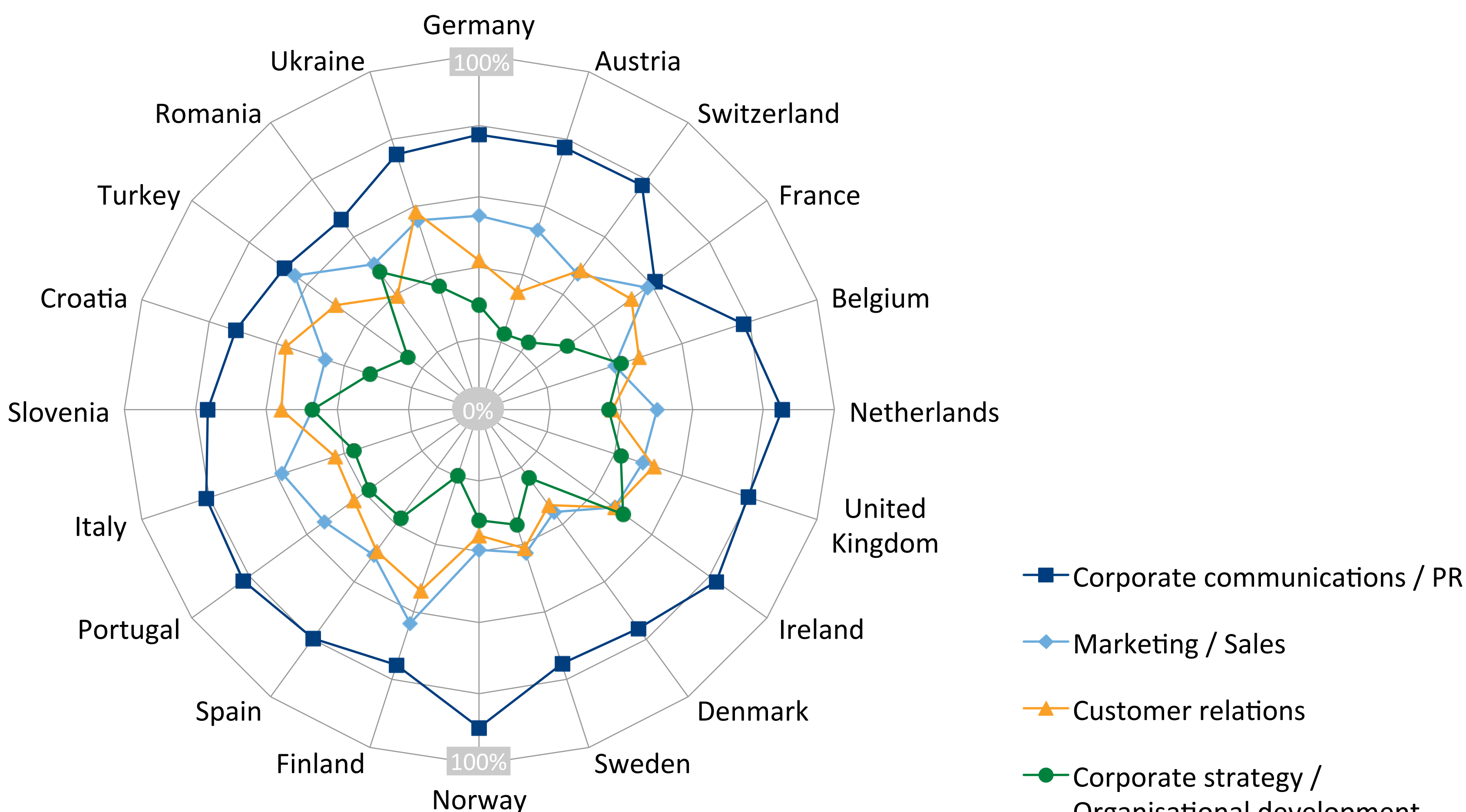
www.communicationmonitor.eu / Zerfass et al. 2015 / n^{min} = 1,203 PR professionals from 20 countries working in communication departments. Q 10: Which of the following have been implemented in your organisation or are planned for 2015? Percentages: agreement to implementation of each item.
** Highly significant differences (chi-square test, p ≤ 0.01). * Significant differences (chi-square test, p ≤ 0.05).

Organisational listening: respondents claim that corporate communications functions are forerunners in the field, followed by marketing and CRM

Organisational functions who are forerunners in listening to stakeholders

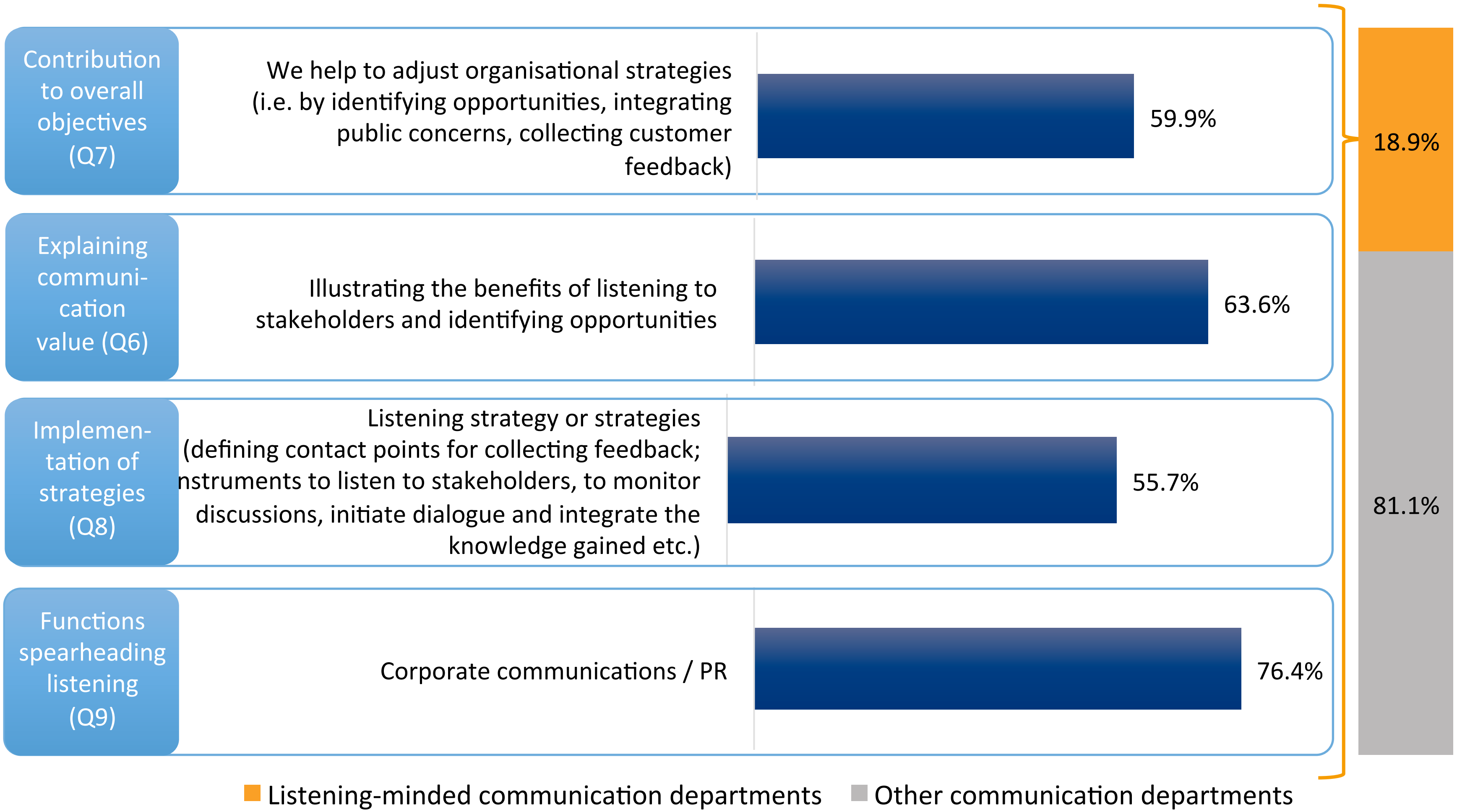
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,442 PR professionals in communication departments. Q 9: Which three (3) functions in your organisation are forerunners in systematically listening to their respective stakeholders (based on competencies, experiences, strategies, and instruments implemented)? Max. 3 selections per respondent.

Country-to-country analysis: marketing functions believed to play a major role in organisational listening in France, Finland and Turkey



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,231 PR professionals from 20 countries working in communication departments. Q 9: Which three (3) functions in your organisation are forerunners in systematically listening to their respective stakeholders (based on competencies, experiences, strategies, and instruments implemented)? Max. 3 selections per respondent.

Identifying listening-minded communication departments based on mindsets and structures: 18.9 per cent are ahead of the rest



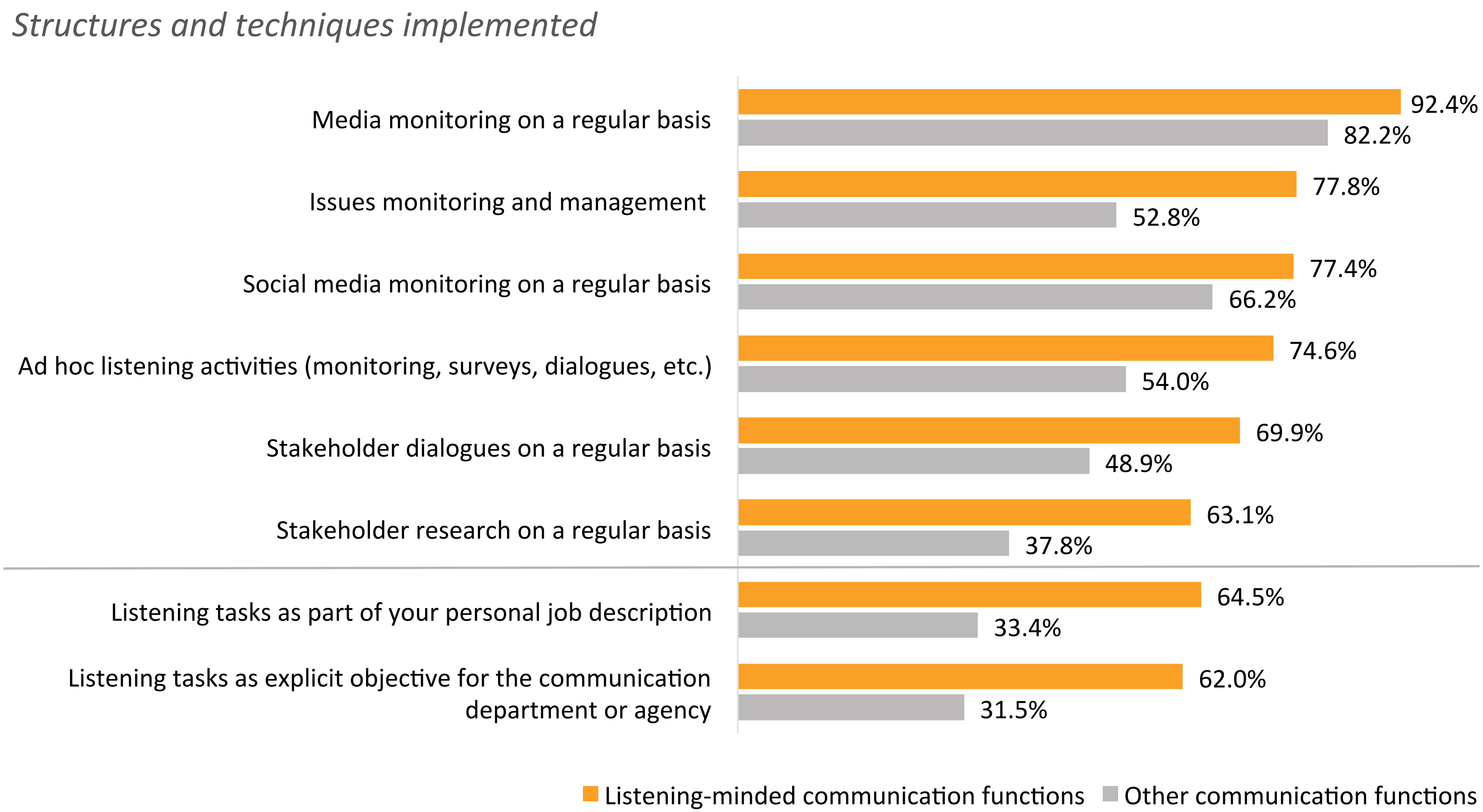
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professionals in communication departments. Organisations outperforming in all four dimensions (scale points 4-5 on a 5-point-scale or item selection) are considered as listening-minded communication departments

Listening-minded communication departments are strongly convinced of benefits for the organisations and social media

	Objectives of organisational listening		Means of organisational listening	
	Listening to stakeholders helps to advance business/organisational goals **	Listening to stakeholders helps to gain or secure legitimacy for the organisation **	Face-to-face conversations are an effective technique to understand and engage stakeholders **	Social media communication is an effective technique to understand and engage stakeholders **
Listening-minded communication departments	**94.7%** (4.51)	**92.7%** (4.48)	**93.4%** (4.65)	**65.0%** (3.84)
Other communication departments	86.4% (4.35)	83.0% (4.27)	90.1% (4.53)	54.1% (3.61)

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professionals. Q 11: Please state whether you agree or disagree with these statements. Scale 1 (Strongly disagree) – 5 (Strongly agree). Percentages: Based on agreement to each item. Mean values. ** Highly significant differences (Pearson correlation, p ≤ 0.01).

Listening-minded communication departments are more advanced in implementing appropriate structures and techniques



www.communicationmonitor.eu / Zerfass et al. 2015 / n_{min} = 1,406 PR professionals in communication departments. Q 10: Which of the following have been implemented in your organisation or are planned for 2015? Percentages: agreement to implementation of each item. Highly significant differences for all items (chi-square test, $p \leq 0.01$).

Measurement and evaluation

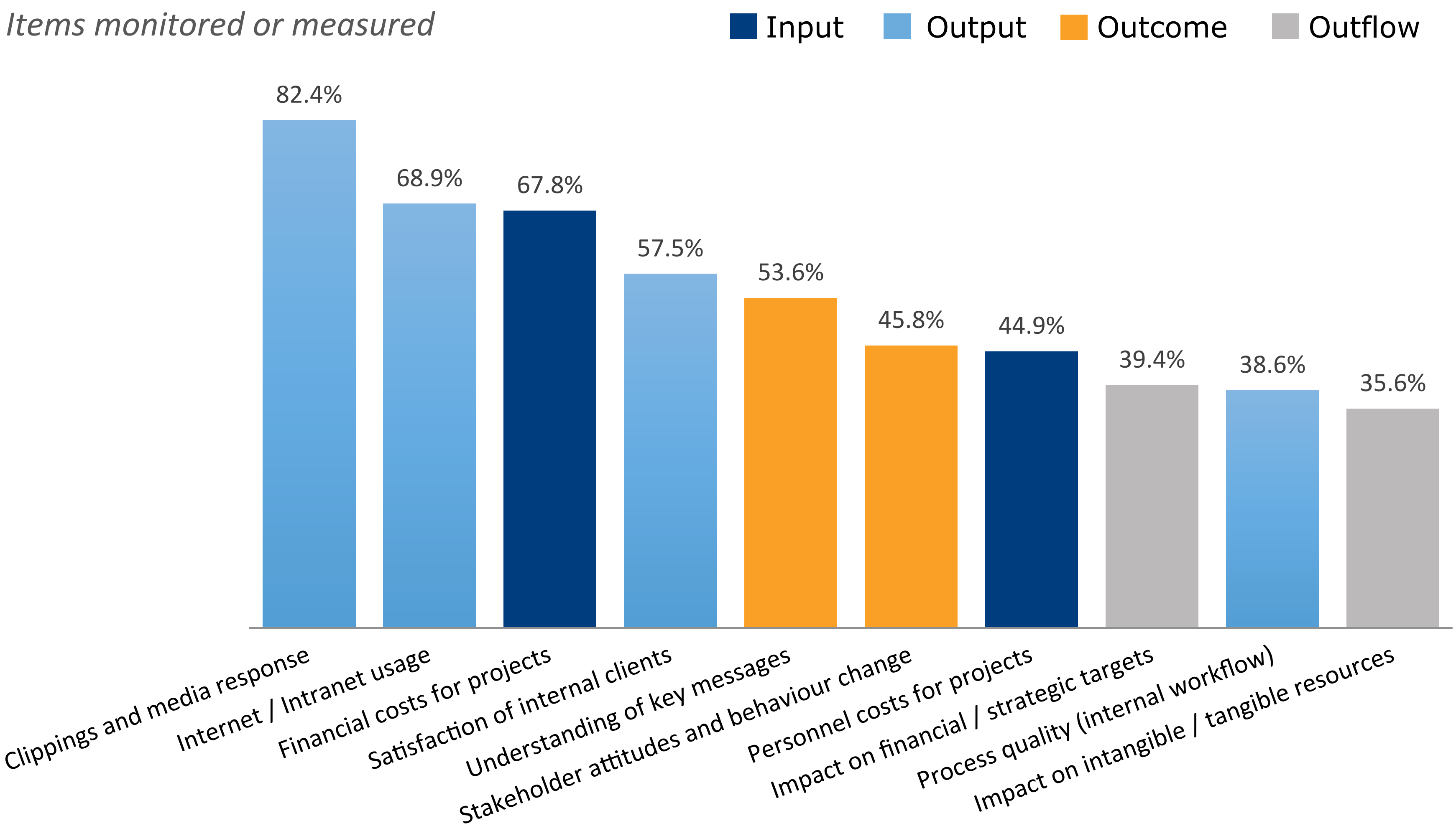
Chapter overview

Measurement and evaluation enables communication practitioners to demonstrate the value of their activities (Watson & Noble, 2014; Zerfass, 2010). To research how professionals are doing today we selected a standard framework developed by academics, management accountants and communication associations in Germany (DPRG/ICV 2011; Watson & Noble, 2014: 170-181). It conceptualises evaluation and measurement activities in four clusters: inputs, outputs, outcomes and outflows. While all are important, demonstrating business value of communication activities is more transparent if done at the outcome and outflow levels. The European Communication Monitor introduced and used this model for the first time five years ago (Zerfass et al., 2010: 96-103). Five years later in the 2015 survey the results are nearly the same: output measures like clippings and media responses (82.4 per cent), internet/intranet usage (68.9 per cent) and the satisfaction of (internal) clients (57.5 per cent) lead the way before outcome and input measures, with outflow measures at the bottom (impact on financial and strategic targets, 39.4 per cent; impact on intangible/tangible resources, 35.6 per cent). This shows that communicators are still focussed on media and channels, while they care less about the resources used to initiate communication processes, on the stakeholders addressed by communication activities, and most importantly on any results this has for the achievement of organisational goals. While these numbers might look depressing, comparing the 2015 data to those from 2010 reveal improvements. The biggest increases are indeed in inflow measurements (evaluating financial and personnel costs for projects) and outflow measurements (impact on financial/strategic assets and impact on intangible/tangible resources).

This finding that 35.6 per cent evaluate the impact of communication on intangible or tangible resources is extremely interesting and contradictory, considering that the same respondents see their major role in contributing to organisational objectives by building immaterial assets like brands, reputation, and organisational culture. 75.5 per cent of the respondents supported this claim (see chapter on strategic issues and value contribution above). It is hard to comprehend how communicators do so if only a fraction monitors or measures the impact. The inconsistency between what communicators are pretending to do and how they explain their tasks to top management on the one hand, and the levels of monitoring and measurement of the same activities on the other, may be a major part of an explanation on why “Linking business strategy and communication” remains consistently the most important issue for communication management over many years. One of solutions to this problem is a simple one: to be able to demonstrate business value, you have to also measure what you do (Watson, 2012).

Another result worth reflecting is the low percentage of communication departments using measuring data for leading communication teams or steering agencies and service providers (43.3 per cent). Slightly more are using these insights into processes to reflect goals and direction of communication strategies (58.0 per cent) or planning new activities (62.9 per cent). Nevertheless, the value of data for managing strategic communication seems to be overseen by many professionals today. Moreover, the need to explain actions through figures in large organisations is being neglected if only 59.5 per cent of the communication departments in the sample use measurement insights to explain the value of communication to top executive. The need to advance business competencies among communicators identified in previous editions of this research (Zerfass et al., 2012: 86-95) is a continuing challenge for the profession.

Measurement and evaluation: How communication departments assess the effectiveness of their activities



www.communicationmonitor.eu / Zerfass et al. 2015 / n min = 1,496 PR professionals in communication departments. Q 12: Which items are monitored or measured by your organisation to assess the effectiveness of communication management / public relations? Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5.

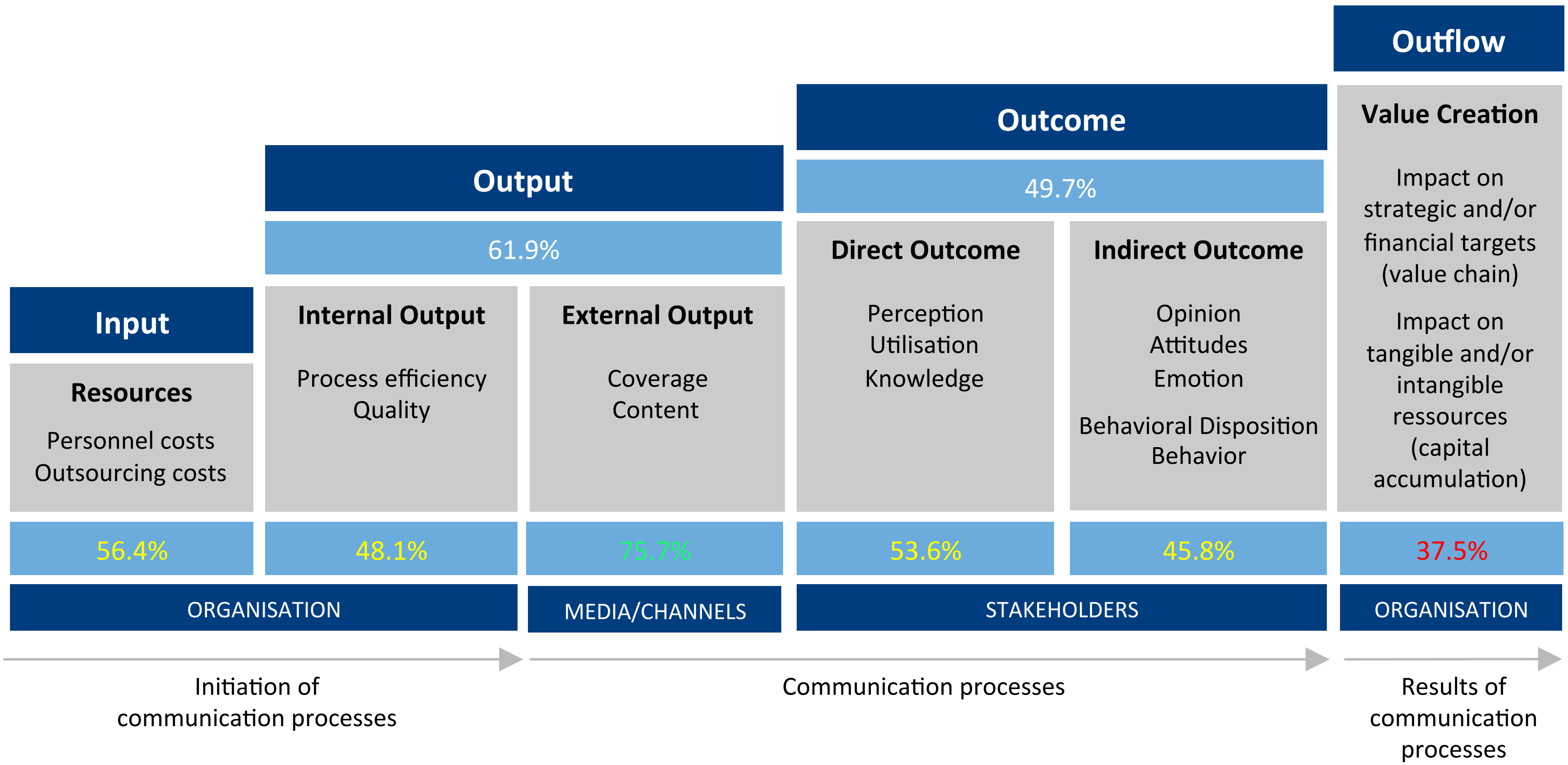
Longitudinal analysis: measurement methods used in 2010 and 2015

Items monitored or measured	2010	2015	Δ
Impact on intangible/tangible resources (i.e. economic brand value)	24.9%	35.6%	10.7%
Impact on financial/strategic targets (i.e. with scorecards, strategy maps)	26.2%	39.4%	13.2%
Stakeholder attitudes and behaviour change	40.9%	45.8%	4.9%
Understanding of key messages	52.4%	53.6%	1.2%
Clippings and media response	82.0%	82.4%	0.4%
Internet / Intranet usage	72.2%	68.9%	- 3.3%
Satisfaction of internal clients	55.5%	57.5%	2.0%
Process quality (internal workflow)	26.0%	38.6%	12.6%
Financial costs for projects	46.7%	67.8%	21.1%
Personnel costs for projects	25.7%	44.9%	19.2%

Input Output Outcome Outflow

www.communicationmonitor.eu / Zerfass et al. 2015 / n^{min} = 1,496 professionals in communication departments. Q 12: Which items are monitored or measured by your organisation to assess the effectiveness of communication management / public relations? Scale 1 (Do not use at all) – 5 (Use continuously). Zerfass et al. 2010 / n = 1,533. Q 9: Which items do you monitor or measure to assess the effectiveness of public relations / communication management?) Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5. Gaps might partly be attributed to variations in the questionnaire instrument.

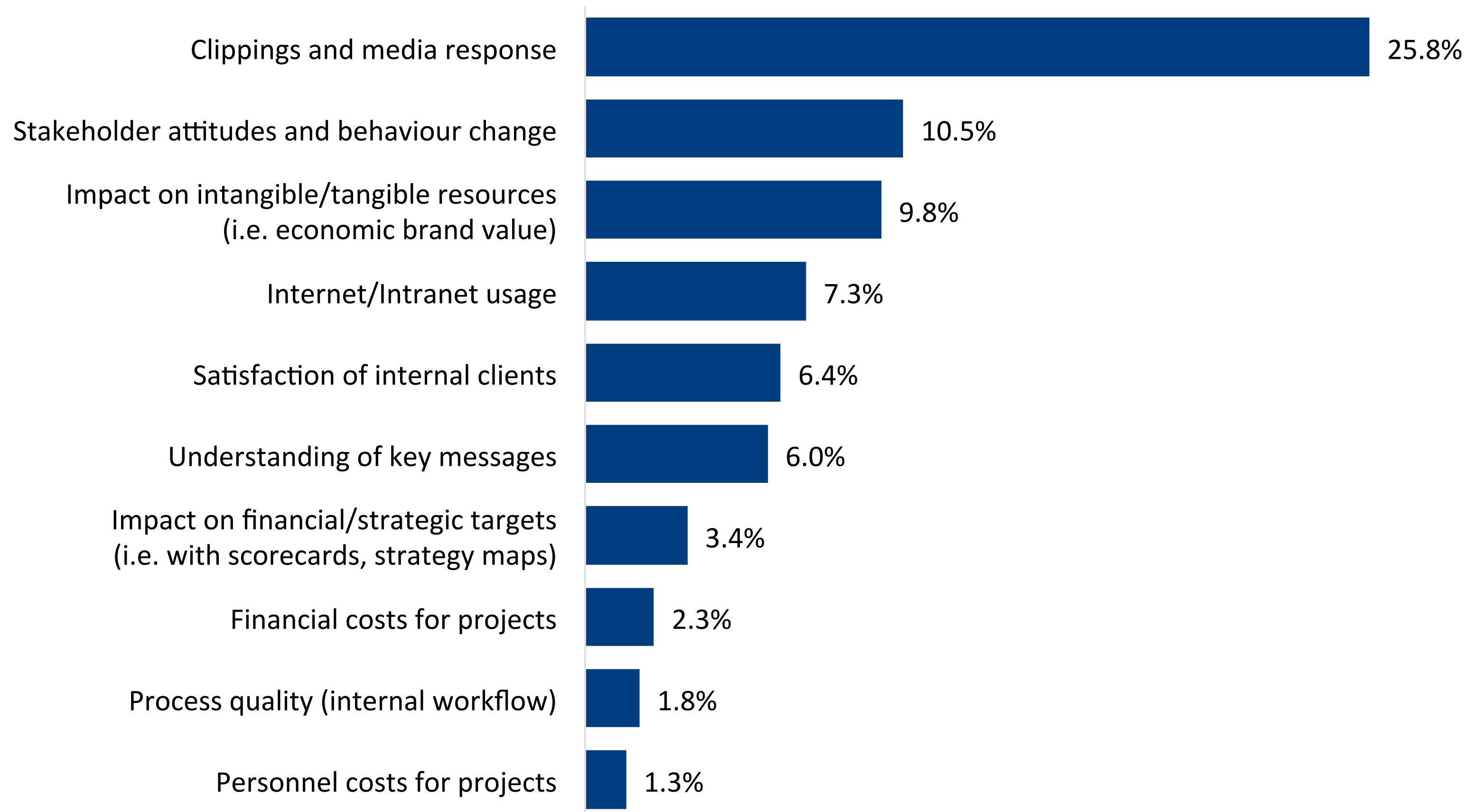
Many organisations focus only on a small part of the overall process when measuring communication activities



www.communicationmonitor.eu / Zerfass et al. 2015 / n^{min} = 1,496 PR professionals in communication departments. Q 12: Which items are monitored or measured by your organisation to assess the effectiveness of communication management / public relations? Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5. Figures depicted within the DPRG/ICV framework for communication measurement (Zerfass 2010).

External service providers are mostly used to support media monitoring

Measurement methods used and supported by external service providers



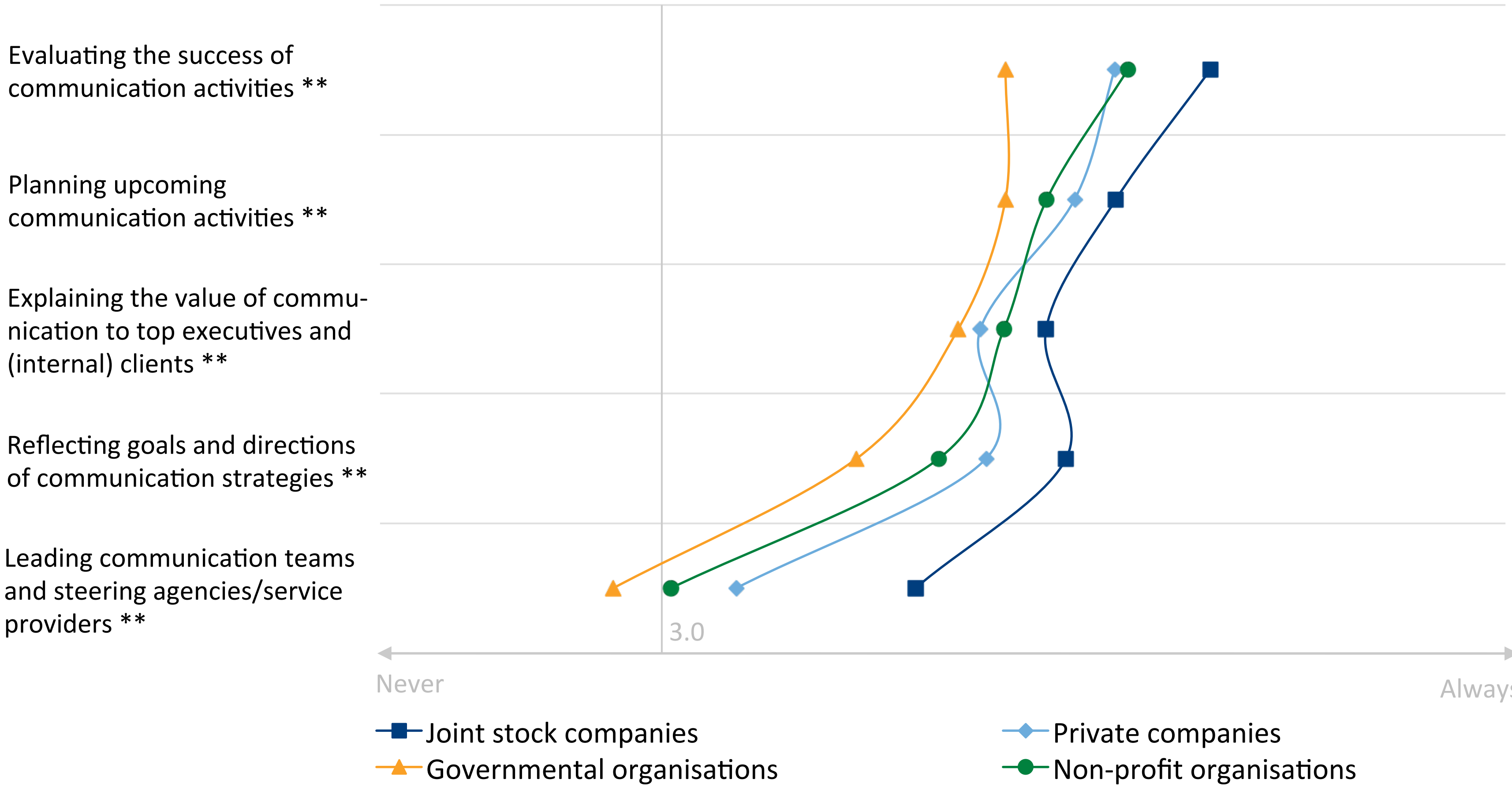
www.communicationmonitor.eu / Zerfass et al. 2015 / n ^{min} = 1,188 PR professionals in communication departments. Q 12: Which items are monitored or measured by your organisation to assess the effectiveness of communication management / public relations? Please tick the box if data collection and/or interpretation are supported by external service providers. Percentages: Based on agreement to external support.

Measurement insights: less than two third of the communication departments use evaluation data for planning purposes and only 43 per cent for leadership

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professionals in communication departments. Q 14: How are insights from communication measurement used in your organisation? Scale 1 (Never) – 5 (Always). Percentages: Frequency based on scale points 4-5.

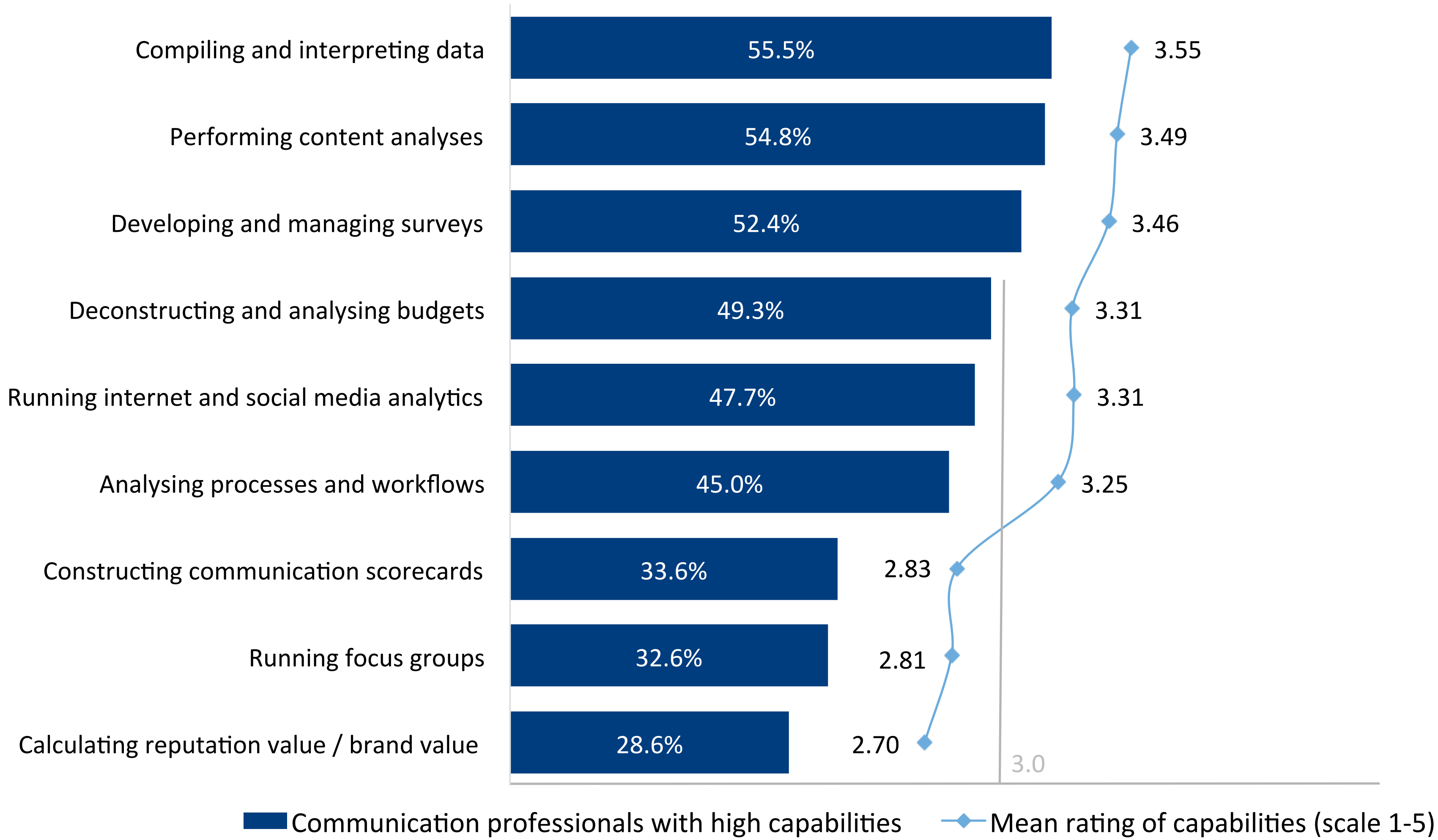
Use of measurement insights in different types of organisations

Measurement data and reports are used for …



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professionals working in communication departments. Q 14: How are insights from communication measurement used in your organisation? Scale 1 (Never) – 5 (Always). Mean values. ** Highly significant differences (ANOVA/Scheffe post-hoc test, p ≤ 0.01). * Significant differences (ANOVA/Scheffe post-hoc test, p ≤ 0.05).

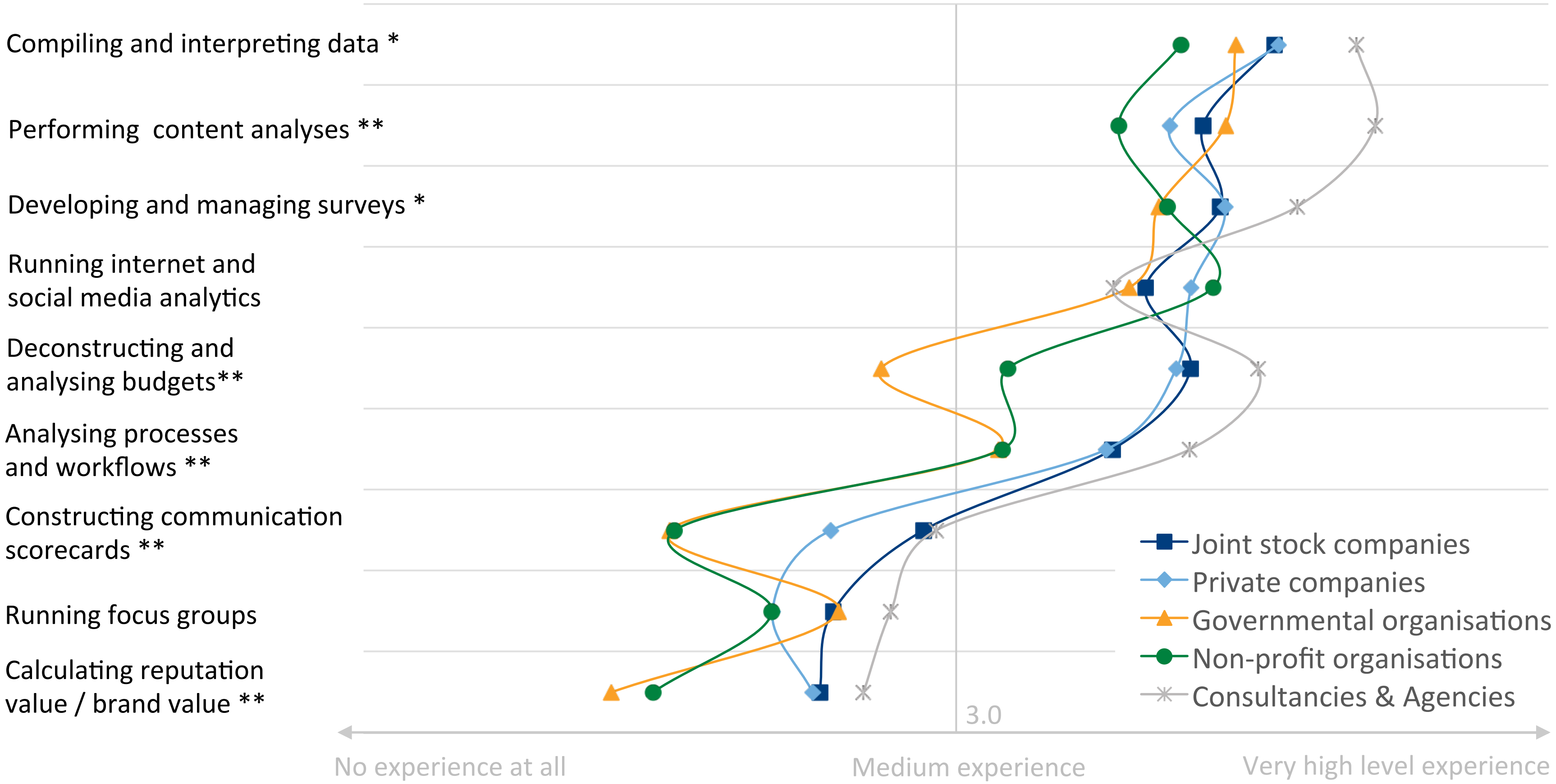
Measurement and evaluation skills: communication professionals in Europe report moderate capabilities



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,993 PR professionals. Q 13: How would you rate your personal capabilities in the following areas? Scale 1 (No experience at all) – 5 (Very high level experience). Percentages: Frequency based on scale points 4-5. Mean values.

Measurement and evaluation skills of professionals working in different types of organisations

Personal capabilities in communication measurement



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Communication professionals at higher hierarchy are better qualified to use data for managing budgets, processes and communication value

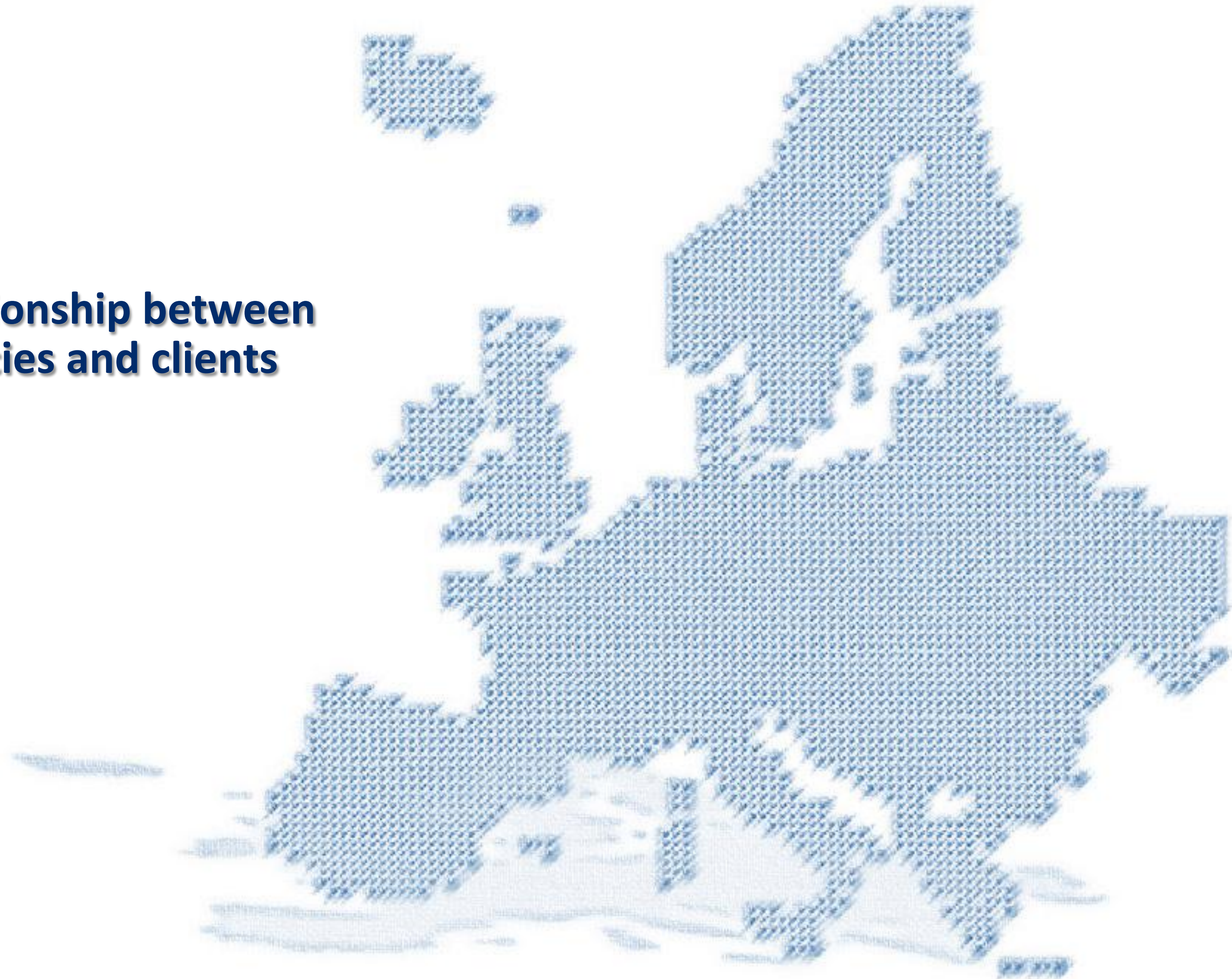
	Head of communication / Agency CEO			Unit leader			Team member / consultant		
Level of experience	High	Medium	Low	High	Medium	Low	High	Medium	Low
Compiling and interpreting data *	58.8%	26.0%	15.1%	56.0%	29.5%	14.6%	49.8%	31.0%	19.3%
Deconstructing and analysing budgets **	59.1%	24.3%	16.7%	49.4%	22.4%	28.2%	30.2%	22.6%	47.1%
Analysing processes and workflows **	52.0%	25.8%	22.2%	44.4%	30.7%	24.9%	33.1%	28.6%	38.3%
Calculating reputation value / brand value **	33.4%	28.9%	37.6%	27.4%	27.7%	44.9%	20.7%	23.3%	56.0%

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,889 PR professionals. Q 13: How would you rate your personal capabilities in the following areas? Scale 1 (No experience at all) – 5 (Very high level experience). Percentages: High experience – scale points 4-5; Medium experience – scale point 3; Low experience – scale points 1-2. ** Highly significant differences (chi-square test, $p \leq 0.01$). * Significant differences (chi-square test, $p \leq 0.05$).

Measurement capabilities are correlated with the professional role and experience of communicators

	Media relations	Strategy and coordination	Consultancy, advising, coaching, key account	Online communication	Internal communication
Compiling and interpreting data	3.39 **	3.67 **	3.73 **	3.42 *	3.44
Developing and managing surveys	3.31 **	3.67 **	3.63 **	3.29 **	3.56
Performing content analyses	3.42	3.60 **	3.60 *	3.54	3.30 **
Deconstructing and analysing budgets	3.18 *	3.57 **	3.48 **	3.00 **	3.03 **
Running internet and social media analytics	3.20 *	3.32	3.19 *	3.95 **	3.07 **
Analysing processes and workflows	3.16 *	3.45 **	3.43 **	3.07 **	3.13
Running focus groups	2.56 **	2.99 **	3.09 **	2.38 **	3.05 **
Constructing communication scorecards	2.83	3.02 **	2.98 *	2.67 *	2.71
Calculating reputation value / brand value	2.69	2.84 **	2.83 *	2.54 *	2.38 **

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,889 PR professionals. Q 13: How would you rate your personal capabilities in the following areas? Scale 1 (No experience at all) – 5 (Very high level experience). Mean values. ** Highly significant differences (Independent samples T-Test, p ≤ 0.01). * Significant differences (Independent samples T-Test, p ≤ 0.05).



Relationship between agencies and clients

Chapter overview

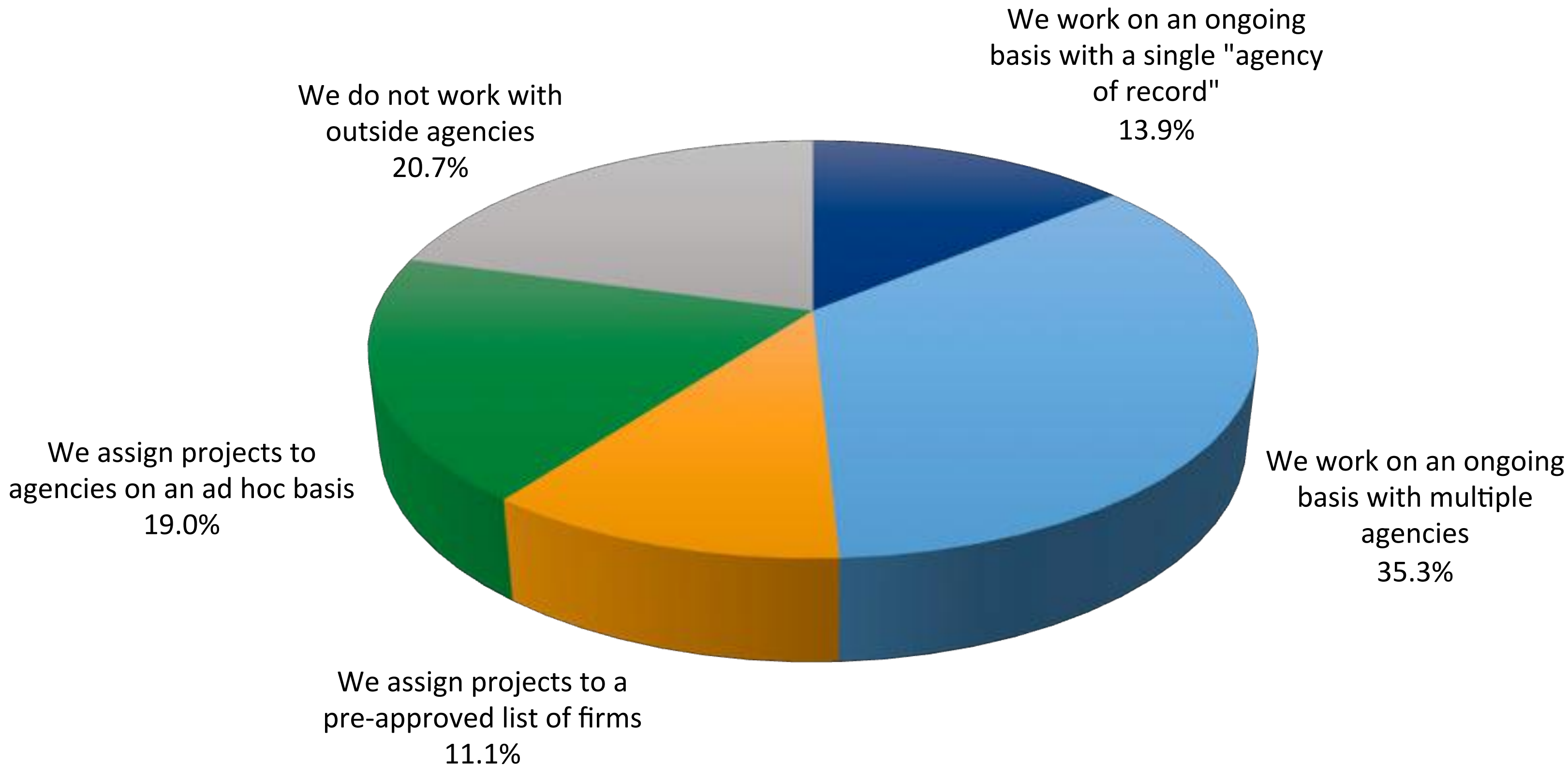
The use of agencies, consultancies and freelance practitioners is a common practice in communication management (Eagle et al., 2015: 123-238). The findings from this survey verify this practice across all types of organisations. They also demonstrate some interesting diversification in reasons for using this additional resource as well as interpretations on what independent counsel brings to the organisation as well as who or what is to blame when the relationship breaks down or goes wrong (Bourland, 1993; Murphy & Maynard, 1997). Most of all the communication departments work on an ongoing basis with multiple agencies. In fact only one in five organisations (20.7 per cent) do not work with outside agencies at all, and 13.8 per cent of organisations work on an ongoing basis with a single "agency of record". There are fundamental differences between the four sectors reported in the ECM 2015 survey. Nearly 20 (19.5) per cent of joint stock companies work with a single "agency of record", compared to 17.3 per cent of private companies. These figures are even lower for governmental organisations (7.9 per cent) and non-profit organisations (5.6 per cent). Only 10.6 per cent of joint stock companies do not work with agencies at all, with this figure rising to 21.8 per cent of private companies, 28.0 per cent of non-profit organisations and 29.5 per cent of governmental organisations.

It is interesting to note differences in how clients and agencies see the reasons and explanations for why organisations employ agencies (Tench et al., 2002; Fielden et al., 2003). While both sides are close on the need to integrate creativity and use additional "arms and legs", there are wide misperceptions on the side of agencies that they are more often employed for expertise; strategic insight; objective, independent counsel; their ability to understand and explain communication trends and new instruments; and being able to support in explaining communication strategies to top executives. In summary the agencies are more optimistic about their overall value and contribution to the client organisations when compared with the clients' own responses.

There are also wide differences in assessing reasons for agency-client conflicts (Bourland, 1993; Murphy & Maynard, 1997). While clients see the main reason for conflicts originating in the lack of knowledge of the client's business and processes (62.3 per cent), only one in five respondents on the agency side see this as a problem (21.0 per cent). On the other hand, nearly three quarters of agency respondents named unclear objectives and expectations as the main reason for conflicts (73.0 per cent), while only a third of respondents from the client side see this as a major reason (33.3 per cent). Obviously each side blames the other one for conflicts.

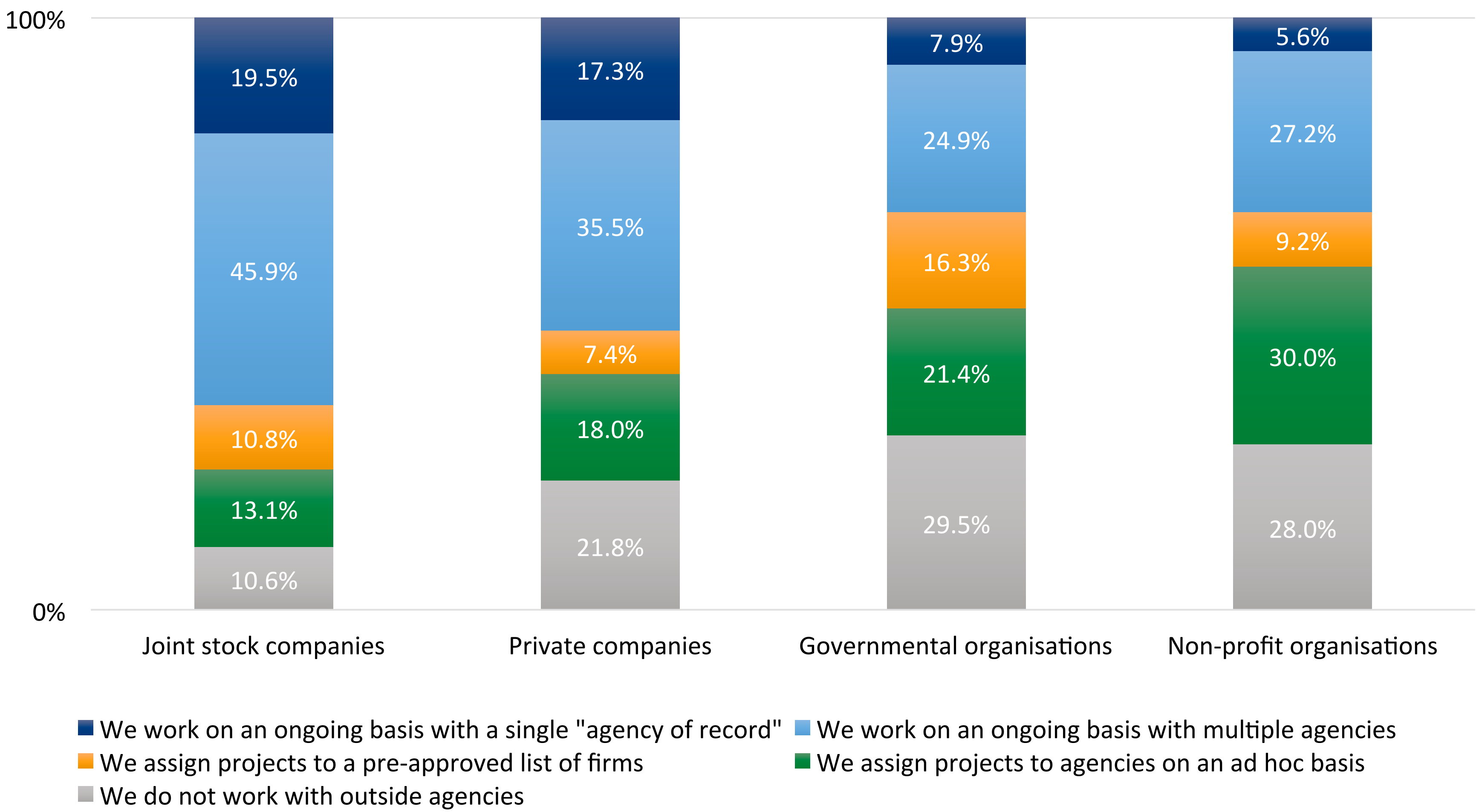
Results clearly demonstrate that hiring agencies demands competencies on the side of communication departments as well as a realistic understanding of communication in organisational settings by consultancies. To make good use of the money spent organisations have to educate and train in-house practitioners to understand what they can get from agencies and how to put that to proper use to add value. Agencies, on the other hand, have to align their business models to the outsourcing needs of clients in a changing business environment.

Four out of five communication departments in Europe work with agencies; every third uses multiple consultants all the time



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professionals in communication departments. Q 18-C: Which of the following best describes the nature of your agency relationship(s)?

Companies employ agencies more often, compared to governmental and non-profit organisations



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professionals in communication departments. Q 18-C: Which of the following best describes the nature of your agency relationship(s)? Highly significant differences between the types of organisations (Pearson correlation, $p \leq 0.01$, Cramer's V = 0.185).

Nature of agency relationships in different European countries

	We work on an ongoing basis with a single "agency of record"	We work on an ongoing basis with multiple agencies	We assign projects to a pre-approved list of firms	We assign projects to agencies on an ad hoc basis	We do not work with outside agencies
Germany	8.5%	57.4%	12.4%	13.2%	8.5%
Austria	23.2%	33.9%	14.3%	14.3%	14.3%
Switzerland	9.3%	53.3%	6.7%	25.3%	5.3%
France	7.5%	45.0%	7.5%	20.0%	20.0%
Belgium	9.6%	26.0%	12.3%	24.7%	27.4%
Netherlands	9.6%	40.4%	18.1%	24.5%	7.4%
United Kingdom	5.1%	30.3%	16.2%	29.3%	19.2%
Ireland	13.5%	40.5%	13.5%	16.2%	16.2%
Denmark	8.7%	34.8%	2.2%	39.1%	15.2%
Sweden	10.9%	38.6%	26.7%	8.9%	14.9%

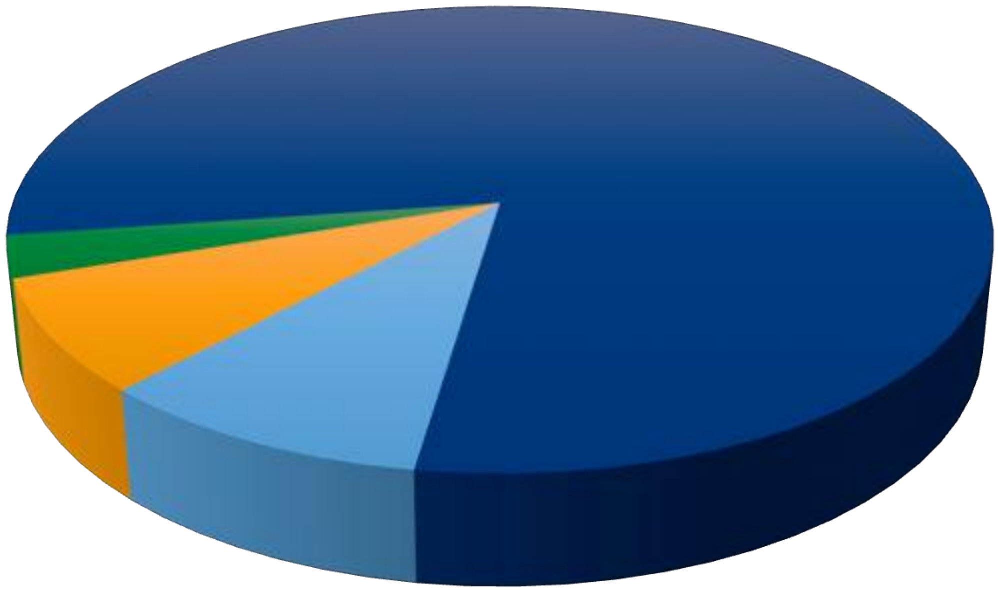
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,366 PR professionals from 20 countries working in communication departments.
Q 18-C: Which of the following best describes the nature of your agency relationship(s)?

Nature of agency relationships in different European countries

	We work on an ongoing basis with a single "agency of record"	We work on an ongoing basis with multiple agencies	We assign projects to a pre-approved list of firms	We assign projects to agencies on an ad hoc basis	We do not work with outside agencies
Norway	13.6%	20.3%	13.6%	37.3%	15.3%
Finland	22.0%	44.0%	8.0%	14.0%	12.0%
Spain	20.5%	34.2%	2.7%	17.8%	24.7%
Portugal	30.0%	25.0%	10.0%	12.5%	22.5%
Italy	15.7%	33.7%	7.9%	28.1%	14.6%
Slovenia	10.7%	28.0%	6.7%	12.0%	42.7%
Croatia	14.3%	18.2%	7.8%	16.9%	42.9%
Turkey	25.8%	45.2%	6.5%	3.2%	19.4%
Romania	13.9%	31.6%	11.4%	7.6%	35.4%
Ukraine	20.9%	25.6%	11.6%	18.6%	23.3%

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,366 PR professionals from 20 countries working in communication departments.
Q 18-C: Which of the following best describes the nature of your agency relationship(s)?

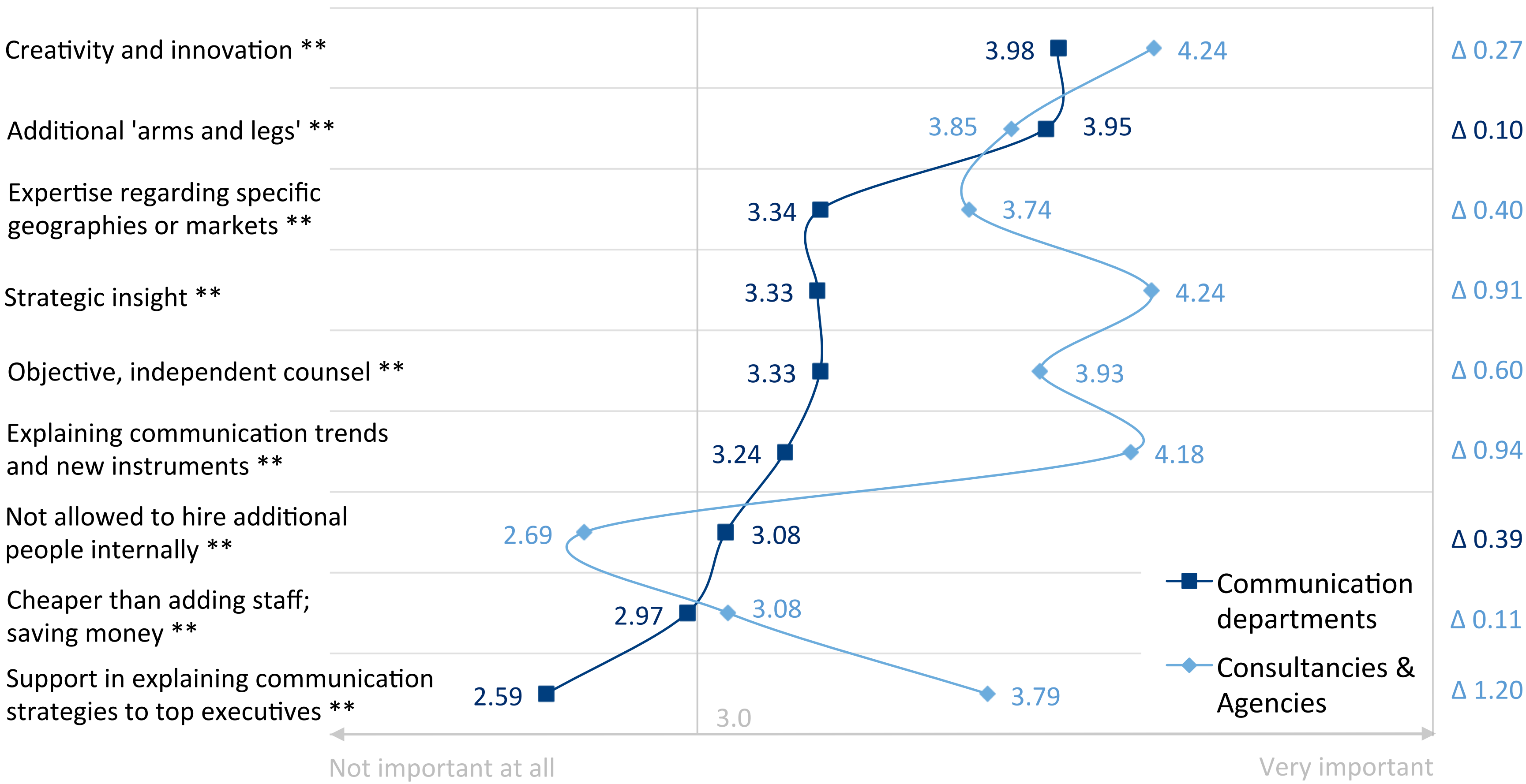
Client relationships from the perspective of communication agencies: a clear majority works continuously for several organisations



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 652 PR professionals in agencies and consultancies. Q 18-A: Which of the following best describes the nature of your client relationship(s)?

Clients and agencies have different perceptions of why they work together

Relative importance why organisations work with agencies, freelancers and consultants



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,277 PR professionals in communication departments; n = 652 PR professionals in agencies and consultancies. Q 19-C: Why does your organisation work with agencies, freelancers and communication consultants? Q 19-A: Why does your average client work with agencies, freelancers and communication consultants? Scale 1 (Not important at all) – 5 (Very important). Mean values. ** Highly significant differences (One Sample t-test, $p \leq 0.01$). * Significant differences (One Sample t-test, $p \leq 0.05$).

Country-to-country analysis: Why communication departments work with agencies

	Strategic insight	Creativity and inno-vation	Objective. indepen-dent counsel	Cheaper than adding staff; saving money	Not allowed to hire additional people internally	Additional 'arms and legs'	Expertise regarding specific geographies or markets	Support in explaining communication strategies to top executives	Explaining / understanding communication trends and new instruments
Germany	39.5%	78.2%	46.2%	38.7%	39.5%	79.8%	44.5%	18.5%	42.0%
Austria	29.2%	77.1%	41.7%	29.2%	37.5%	79.2%	47.9%	35.4%	50.0%
Switzerland	46.5%	67.6%	53.5%	42.3%	39.4%	71.8%	64.8%	25.4%	38.0%
France	46.9%	46.9%	40.6%	37.5%	50.0%	78.1%	46.9%	18.8%	43.8%
Belgium	38.9%	74.1%	33.3%	31.5%	59.3%	77.8%	33.3%	13.0%	35.2%
Netherlands	41.4%	81.6%	49.4%	32.2%	39.1%	81.6%	47.1%	19.5%	42.5%
United Kingdom	52.5%	71.3%	53.8%	26.3%	28.8%	76.3%	67.5%	17.5%	35.0%
Ireland	59.4%	40.6%	53.1%	18.8%	34.4%	53.1%	56.3%	31.3%	43.8%
Denmark	46.2%	76.9%	25.6%	38.5%	25.6%	59.0%	38.5%	28.2%	25.6%
Sweden	41.9%	73.3%	38.4%	33.7%	46.5%	74.4%	31.4%	22.1%	39.5%

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,104 PR professionals from 20 countries working in communication departments. Q 19-C: Why does your organisation work with agencies, freelancers and communication consultants? Scale 1 (Not important at all) – 5 (Very important). Percentages: Importance based on scale points 4-5.

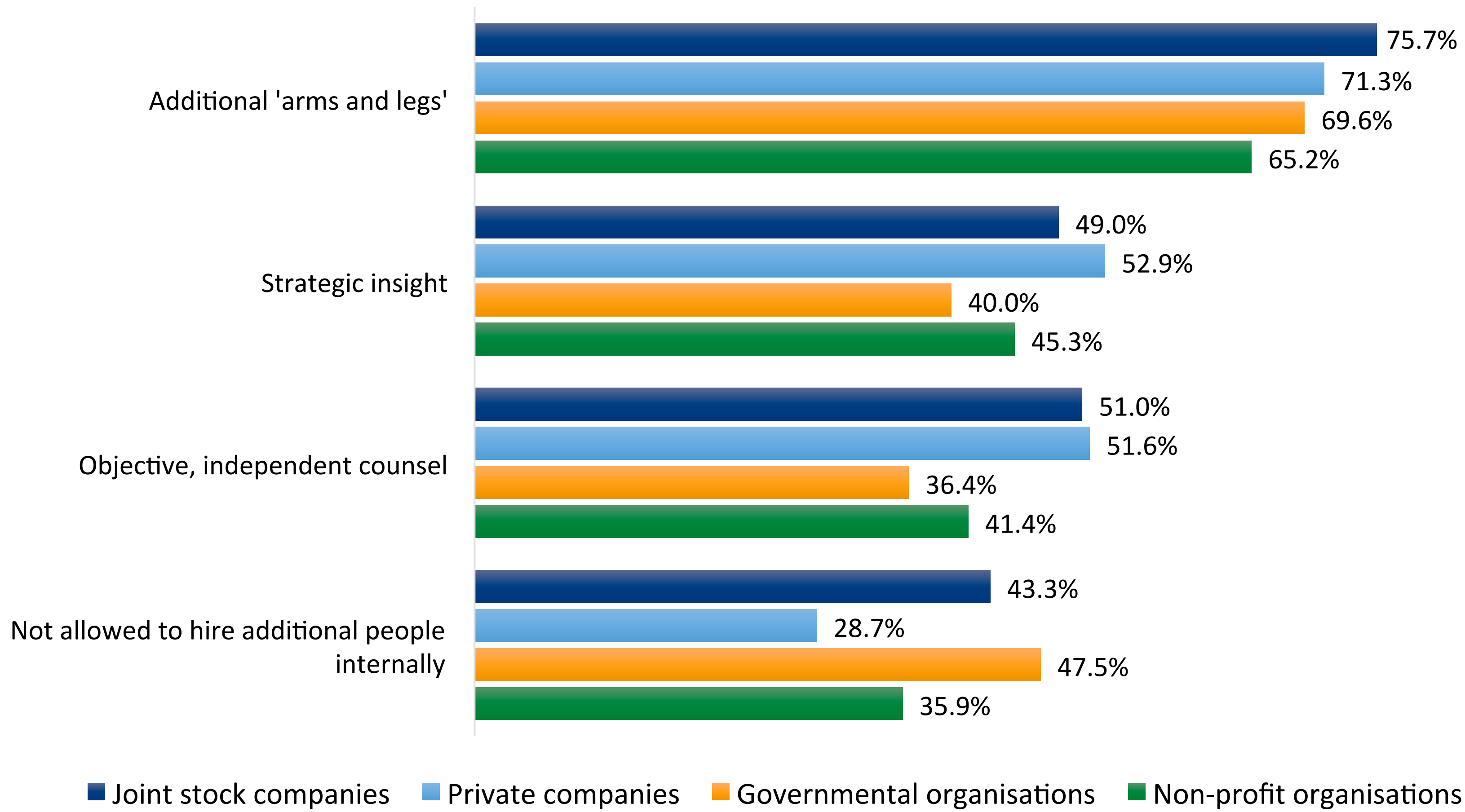
Country-to-country analysis: Why communication departments work with agencies

	Strategic insight	Creativity and inno-vation	Objective, indepen-dent counsel	Cheaper than adding staff; saving money	Not allowed to hire additional people internally	Additional 'arms and legs'	Expertise regarding specific geographies or markets	Support in explaining communication strategies to top executives	Explaining / understanding communication trends and new instruments
Norway	36.0%	76.0%	36.0%	38.0%	38.0%	72.0%	30.0%	18.0%	40.0%
Finland	48.9%	80.0%	44.4%	37.8%	44.4%	77.8%	42.2%	6.7%	46.7%
Spain	47.3%	61.8%	41.8%	30.9%	38.2%	70.9%	56.4%	20.0%	45.5%
Portugal	65.6%	71.9%	59.4%	40.6%	43.8%	78.1%	68.8%	40.6%	65.6%
Italy	61.0%	75.3%	40.3%	32.5%	35.1%	51.9%	58.4%	28.6%	58.4%
Slovenia	51.2%	67.4%	55.8%	37.2%	37.2%	51.2%	58.1%	37.2%	67.4%
Croatia	48.9%	71.1%	44.4%	40.0%	33.3%	66.7%	48.9%	33.3%	44.4%
Turkey	60.0%	72.0%	56.0%	32.0%	36.0%	64.0%	68.0%	44.0%	60.0%
Romania	60.8%	72.5%	54.9%	43.1%	31.4%	70.6%	56.9%	43.1%	58.8%
Ukraine	48.5%	69.7%	39.4%	33.3%	39.4%	72.7%	51.5%	27.3%	39.4%

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,104 PR professionals from 20 countries working in communication departments. Q 19-C: Why does your organisation work with agencies, freelancers and communication consultants? Scale 1 (Not important at all) – 5 (Very important). Percentages: Importance based on scale points 4-5.

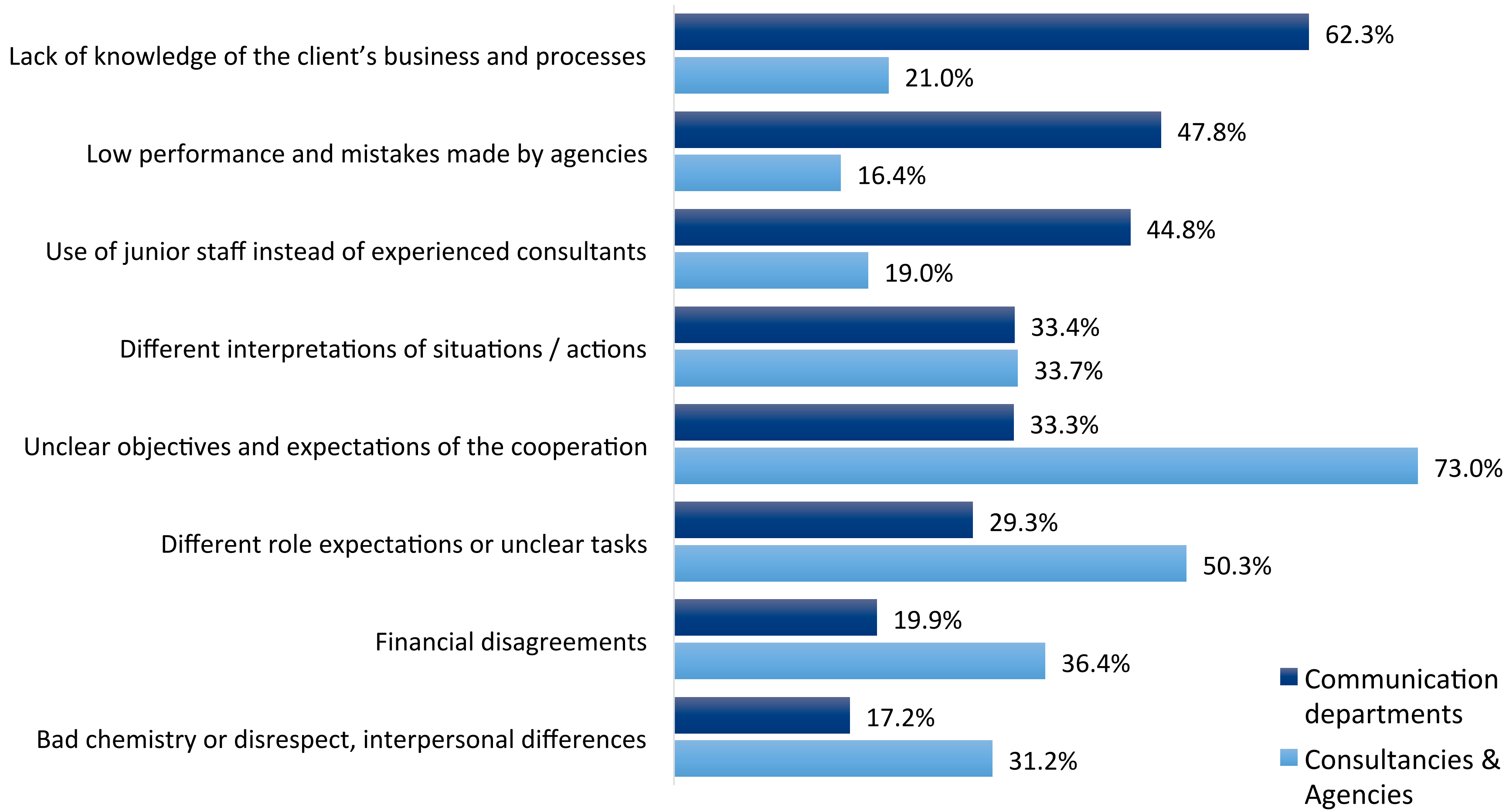
Reasons to work with agencies are correlated with the type of organisation

Relative importance why organisations work with agencies, freelancers and consultants



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,277 PR professionals in communication departments. Q 19-C: Why does your organisation work with agencies, freelancers and communication consultants? Scale 1 (Not important at all) – 5 (Very important). Percentages: Importance based on scale points 4-5. Highly significant differences for all items between types of organisations (chi-square test, p ≤ 0.01).

Source of conflict in client-agency relationships: communication departments complain mainly about knowledge gaps, agencies refer to unclear expectations



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,126 PR professionals in communication departments; n = 599 PR professionals in agencies and consultancies. Q 20-C: Based on your professional experience, what are the three (3) most important reasons for conflict with communication agencies, freelancers or consultants? Q 20-A: Based on your professional experience, what are the three (3) most important reasons for conflict with clients?

Country-to-country analysis: Main reasons for conflict in client-agency relationships from the perspective of communication departments

	Unclear objectives and expectations of the cooperation	Different role expectations or unclear tasks	Financial disagree-ments	Different interpretations of situations / actions	Bad chemistry or disrespect, interpersonal differences	Lack of knowledge of the client's business and processes	Incompatible values, norms or habits	Use of junior staff instead of experienced consultants	Low performance and mistakes made by agencies
Germany	37.1%	30.5%	19.0%	38.1%	13.3%	61.9%	14.3%	39.0%	46.7%
Austria	32.6%	25.6%	25.6%	25.6%	23.3%	69.8%	9.3%	34.9%	53.5%
Switzerland	26.2%	36.1%	14.8%	34.4%	14.8%	63.9%	6.6%	42.6%	60.7%
France	28.6%	21.4%	25.0%	25.0%	7.1%	60.7%	17.9%	60.7%	53.6%
Belgium	38.8%	18.4%	22.4%	38.8%	6.1%	65.3%	14.3%	44.9%	51.0%
Netherlands	27.0%	43.2%	21.6%	31.1%	27.0%	48.6%	9.5%	37.8%	54.1%
United Kingdom	47.1%	17.1%	8.6%	26.3%	24.3%	61.4%	7.1%	61.4%	45.7%
Ireland	25.0%	21.4%	25.0%	35.7%	14.3%	53.6%	10.7%	60.7%	53.6%
Denmark	47.1%	41.2%	11.8%	44.1%	14.7%	67.6%	11.8%	23.5%	38.2%
Sweden	44.4%	35.8%	21.0%	29.6%	16.0%	65.4%	14.8%	34.6%	38.3%

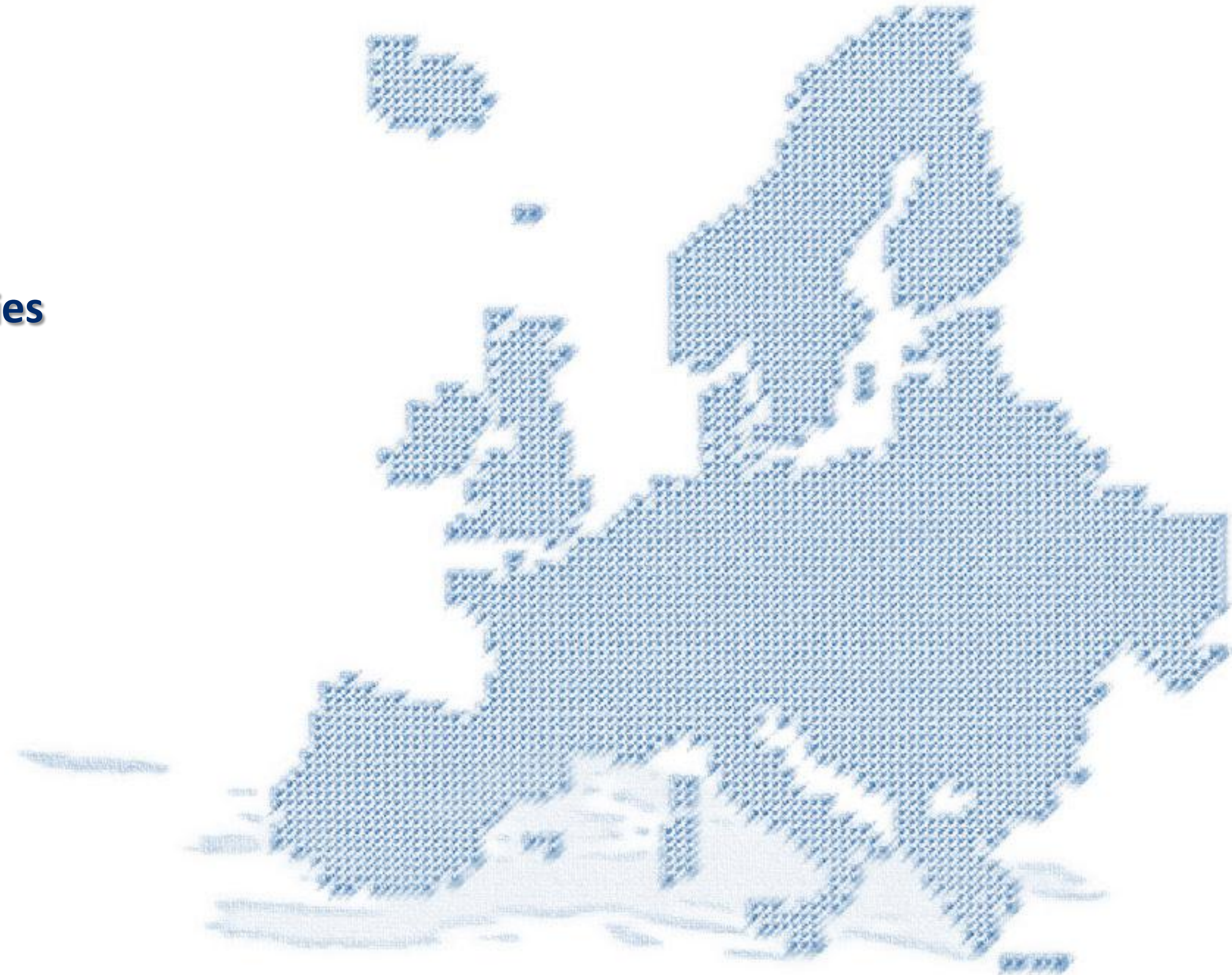
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,126 PR professionals from 20 countries working in communication departments. Q 20-C: Based on your professional experience, what are the three (3) most important reasons for conflict with communication agencies, freelancers or consultants? Percentages: Importance based on scale points 4-5.

Country-to-country analysis: Main reasons for conflict in client-agency relationships from the perspective of communication departments

	Unclear objectives and expectations of the cooperation	Different role expectations or unclear tasks	Financial disagree-ments	Different interpretations of situations / actions	Bad chemistry or disrespect, interpersonal differences	Lack of knowledge of the client's business and processes	Incompatible values, norms or habits	Use of junior staff instead of experienced consultants	Low performance and mistakes made by agencies
Norway	34.1%	36.6%	12.2%	36.6%	26.8%	78.0%	2.4%	29.3%	43.9%
Finland	50.0%	23.7%	15.8%	26.3%	7.9%	73.7%	2.6%	42.1%	57.9%
Spain	23.1%	17.3%	19.2%	26.9%	25.0%	67.3%	15.4%	50.0%	55.8%
Portugal	29.0%	45.2%	22.6%	45.2%	9.7%	48.4%	12.9%	45.2%	41.9%
Italy	33.9%	26.8%	12.5%	33.9%	10.7%	66.1%	10.7%	53.6%	51.8%
Slovenia	15.0%	17.5%	30.0%	32.5%	30.0%	47.5%	17.5%	45.0%	65.0%
Croatia	40.0%	27.5%	32.5%	27.5%	20.0%	60.0%	7.5%	55.0%	30.0%
Turkey	30.0%	20.0%	5.0%	45.0%	20.0%	65.0%	10.0%	50.0%	55.0%
Romania	44.0%	30.0%	22.0%	26.0%	26.0%	60.0%	26.0%	38.0%	28.0%
Ukraine	16.1%	19.4%	25.8%	29.0%	9.7%	58.1%	19.4%	64.5%	58.1%

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,126 PR professionals from 20 countries working in communication departments. Q 20-C: Based on your professional experience, what are the three (3) most important reasons for conflict with communication agencies, freelancers or consultants? Percentages: Importance based on scale points 4-5.

Salaries



Chapter overview

Each year the European Communication Monitor data report on the important demographic variables of age, gender, organisational position and type of organisation as well as the most easily compared figures on salary or rates of pay across the sample which, for this year, was 41 countries across Europe. However it has to be noted that variations in this section will be influenced by different compositions of the sample in each edition of the survey.

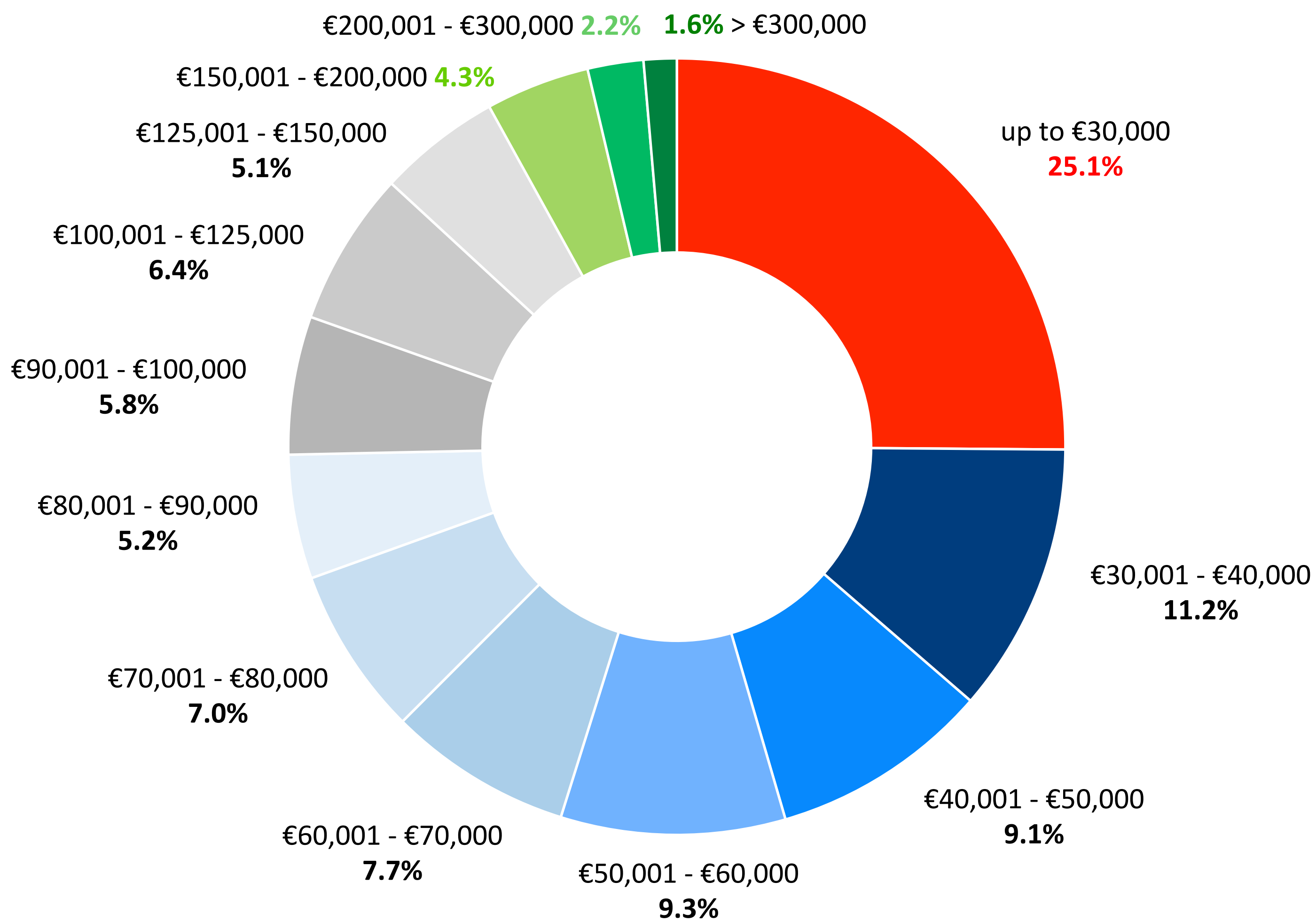
In 2015 the majority of practitioners in Europe earn less than €60,000 per year (54.7 per cent) and a quarter (25.1 per cent) earn even less than €30,000 per year. In this last category are the majority of respondents from Romania, Ukraine, Croatia and Slovenia. At the top end of the pay scales across the 41 countries the numbers are small and with sharp regional differences. For example only a fraction of the top earning practitioners are making over €300,000 (1.6 per cent), followed by another small fraction of practitioners whose pay is between €200,001 and €300,000 (2.2 per cent), and 4.3 per cent of practitioners are making between €150,001 and €200,000 per year.

Generally, joint stock companies pay better than agencies, private companies, non-profit and governmental organisations. There are, however, big differences between countries. While there are only 1.3 per cent of respondents from Switzerland that make less than €30,000, there are 40.0 per cent of respondents from that country with a salary of over €150,000 per year. At the top end of the salary scales and bandings, Switzerland is a clear outlier, with the next country showing nearly a fifth of their respondents at the top end being Germany with 18.0 per cent making over €150,00, followed by Norway with 17.2 per cent and the United Kingdom with 15.1 per cent of respondents.

As with previous years in the ECM survey there is a gender divide and the results demonstrate significant differences in the salaries recorded for male and female practitioners. Put simply and repeating past editions of this survey (Zerfass et al., 2010, 2011, 2014) men earn more than women. At the top side, there are nearly three times more male heads of communication who make more than €150,000 than female practitioners, 20.6 per cent of men against 7.1 per cent of women in these top roles. On the other hand there are nearly twice as many female heads of communication who make less than €30,000 (20.7 per cent) when compared with their male counterparts as heads of communication earning the lower level (10.5 per cent). When reviewing the other positions outside the top practitioner positions then the gender differences are smaller, but still significant. For example at all levels it is clear that male practitioners earn more than female practitioners. A trend that has consistently been recorded and reported in the ECM over past years and discussed in wider literature for the industry (Fielden et al., 2003; Grunig et al., 2001; Tench & Laville; 2014).

On the salary debate there is once again good news from this survey about membership of the European Association of Communication Directors (EACD) and its correlation with levels of pay. There are significantly more EACD members in the ranks of the better paid practitioners and more non-members among the least paid practitioners.

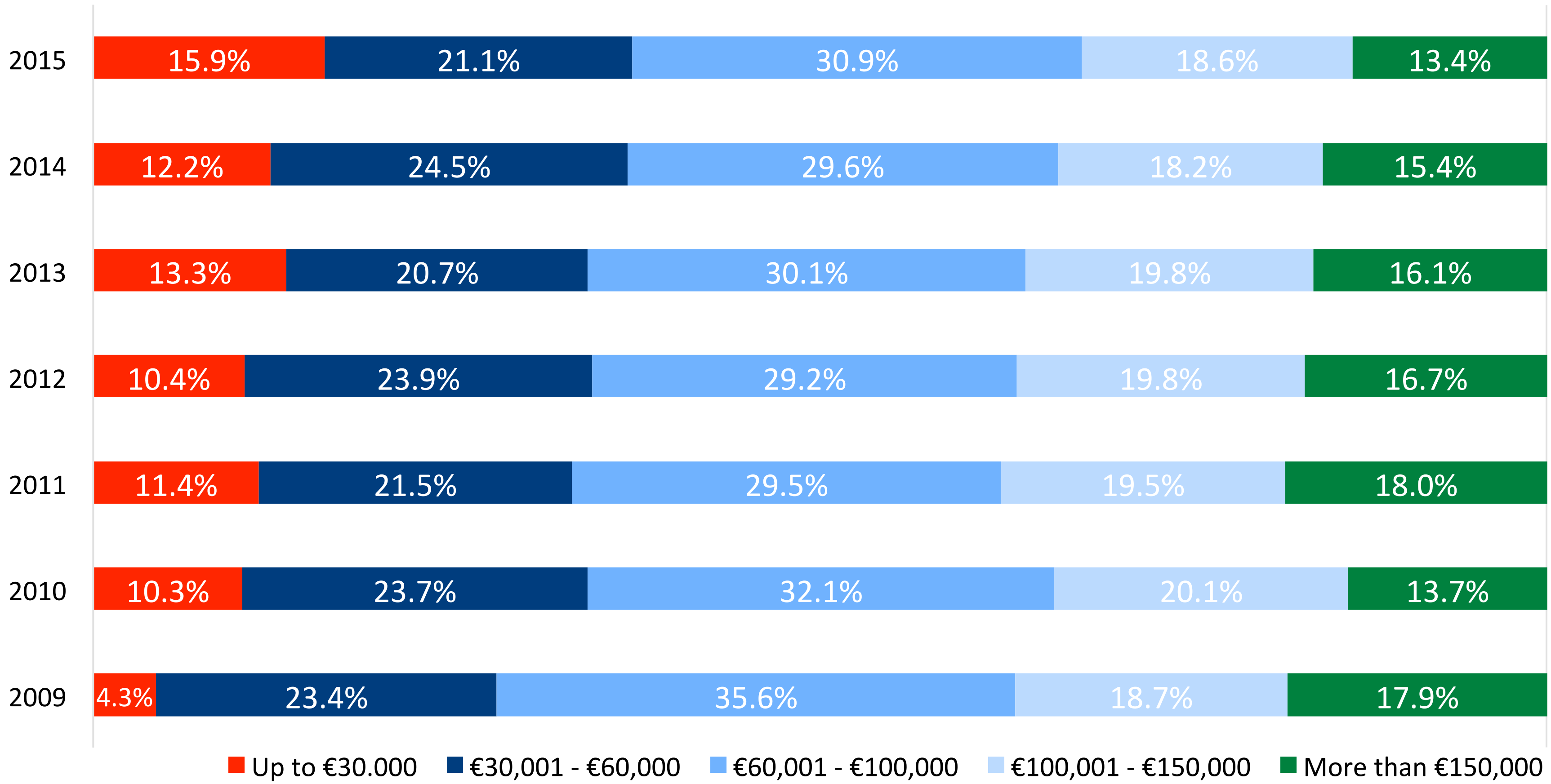
Basic annual salary of communication practitioners in Europe 2015



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 2,394 PR professionals. Q 33: In which of the following bands does your basic annual salary fall?

Development of salaries of top-level communicators

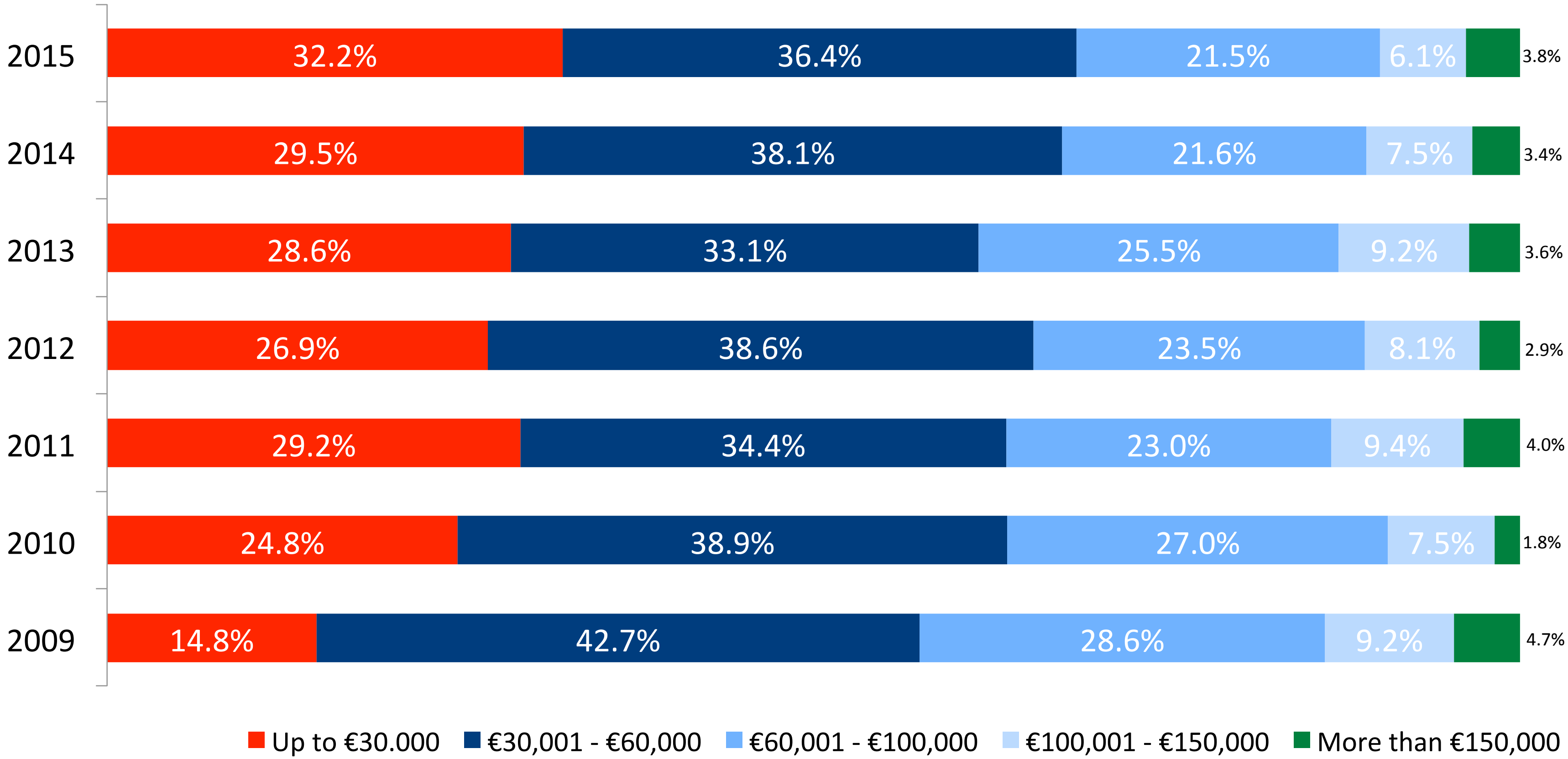
Basic annual salaries (heads of communication / agency CEOs)



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 828 heads of communication / agency CEOs. Q 41. Zerfass et al. 2014 / n = 966. Q17. Zerfass et al. 2013 / n = 970. Q 39. Zerfass et al. 2012 / n = 798. Zerfass et al. 2011 / n = 887. Q 20. Zerfass et al. 2010 / n = 809. Q 19. Zerfass et al. 2009 / n = 951.
Q 33: In which of the following bands does your basic annual salary fall? Results might be influenced by varying numbers and regional/hierarchical background of respondents in annual surveys.

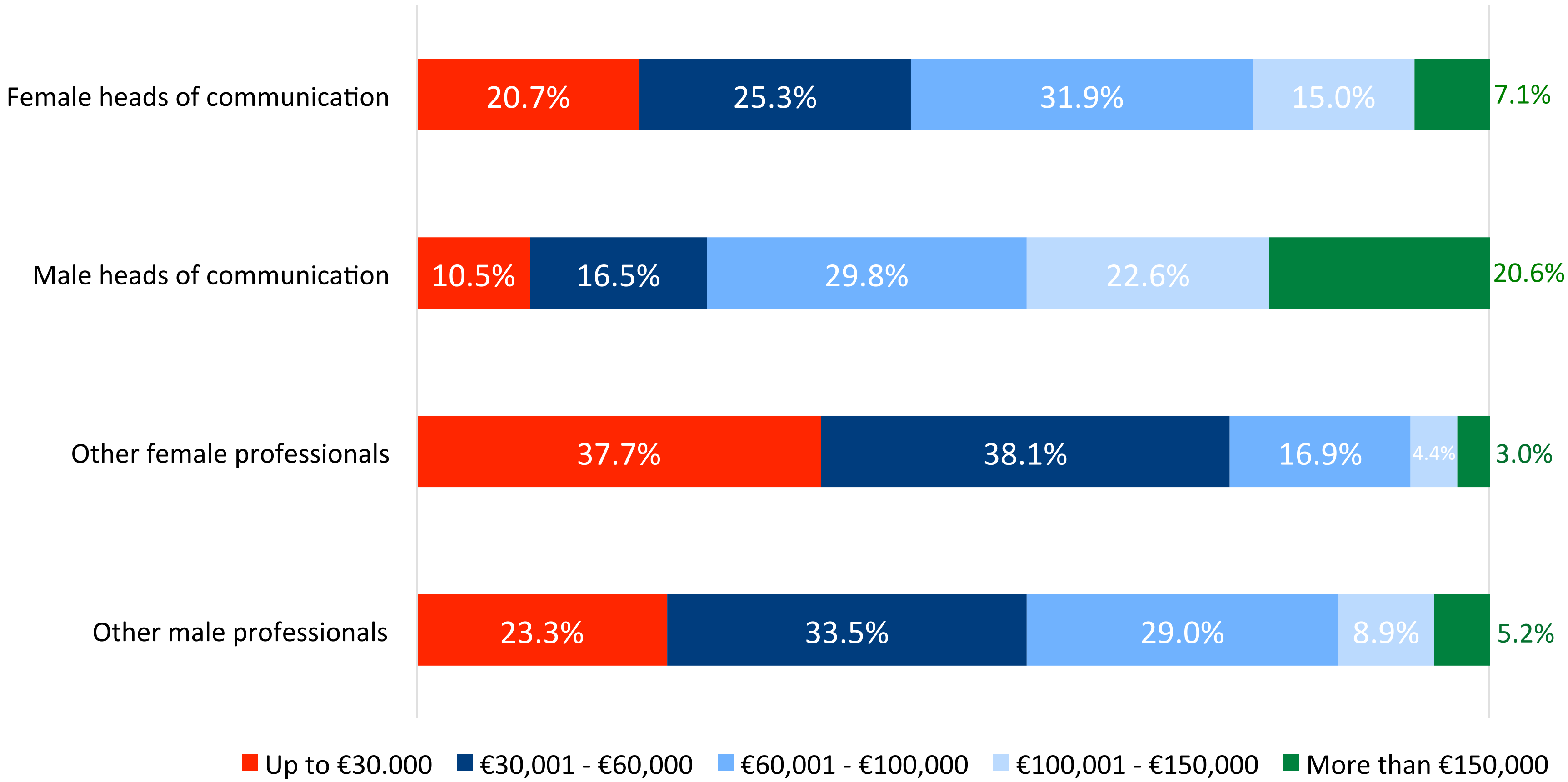
Salary development on other hierarchical levels

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



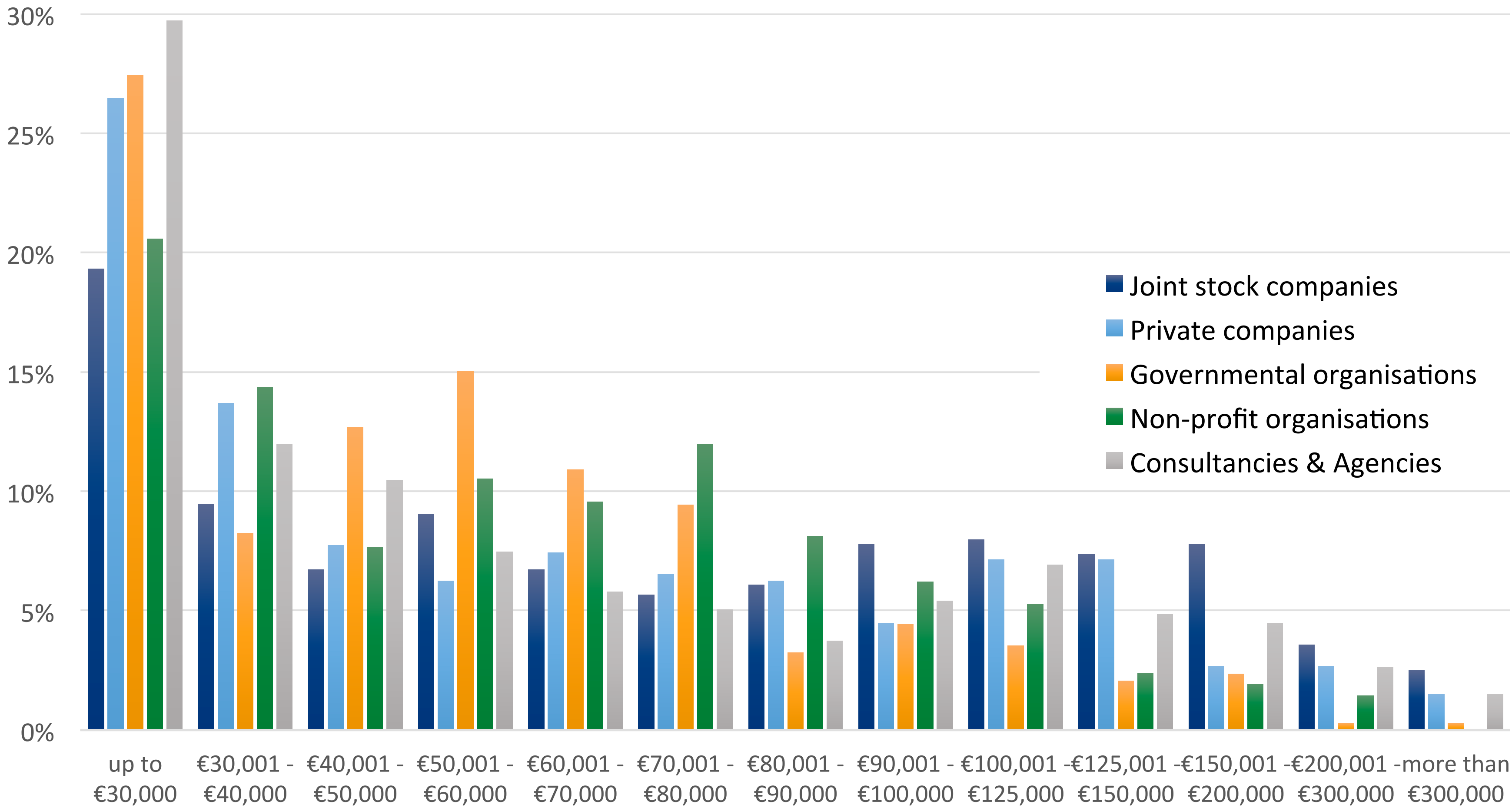
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,067 PR professionals below the top level of the hierarchy. Q 41. Zerfass et al. 2014 / n = 1,428. Q17. Zerfass et al. 2013 / n = 1,287. Q 39. Zerfass et al. 2012 / n = 1,013. Q 38. Zerfass et al. 2011 / n = 927. Q 20. Zerfass et al. 2010 / n = 879. Q 19. Zerfass et al. 2009 / n = 817. Q 33: In which of the following bands does your basic annual salary fall? Results might be influenced by varying numbers and regional/hierarchical background of respondents.

Men earn more than female professionals on the same hierarchical level



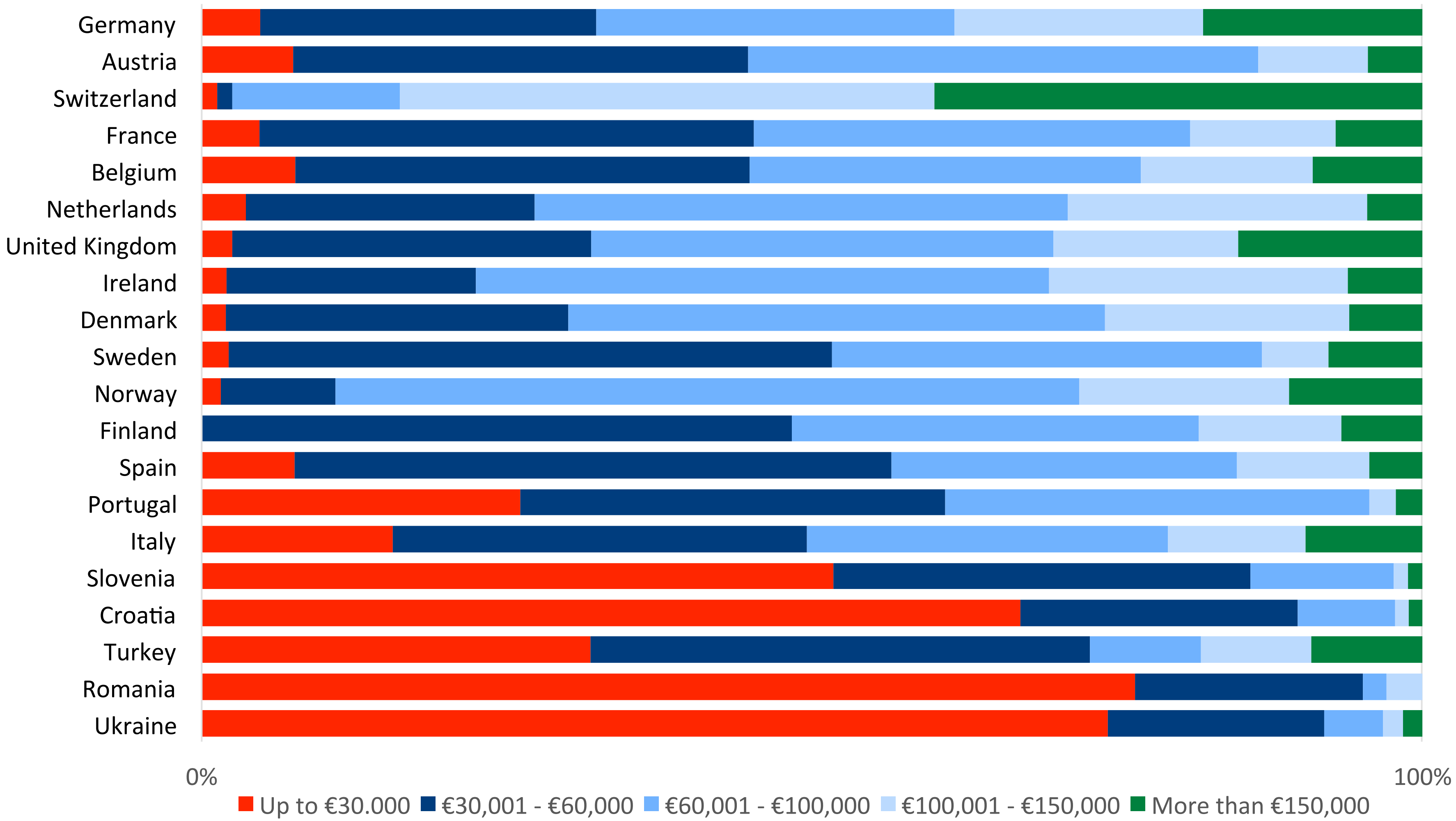
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,895 PR professionals. Q 33: In which of the following bands does your basic annual salary fall? Highly significant differences for heads of communication (chi-square test, p ≤ 0.01, Cramers V = 0.192). Highly significant differences for other professionals (chi-square test, p ≤ 0.01, Cramérs V = 0.242). Results may be influenced by the distribution of types of organisations and countries among both genders.

Annual salaries in different types of organisation



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,895 PR professionals. Q 33: In which of the following bands does your basic annual salary fall? Highly significant differences (chi-square test, $p \leq 0.01$, Cramér's V = 0.115).

Annual salaries in different European countries



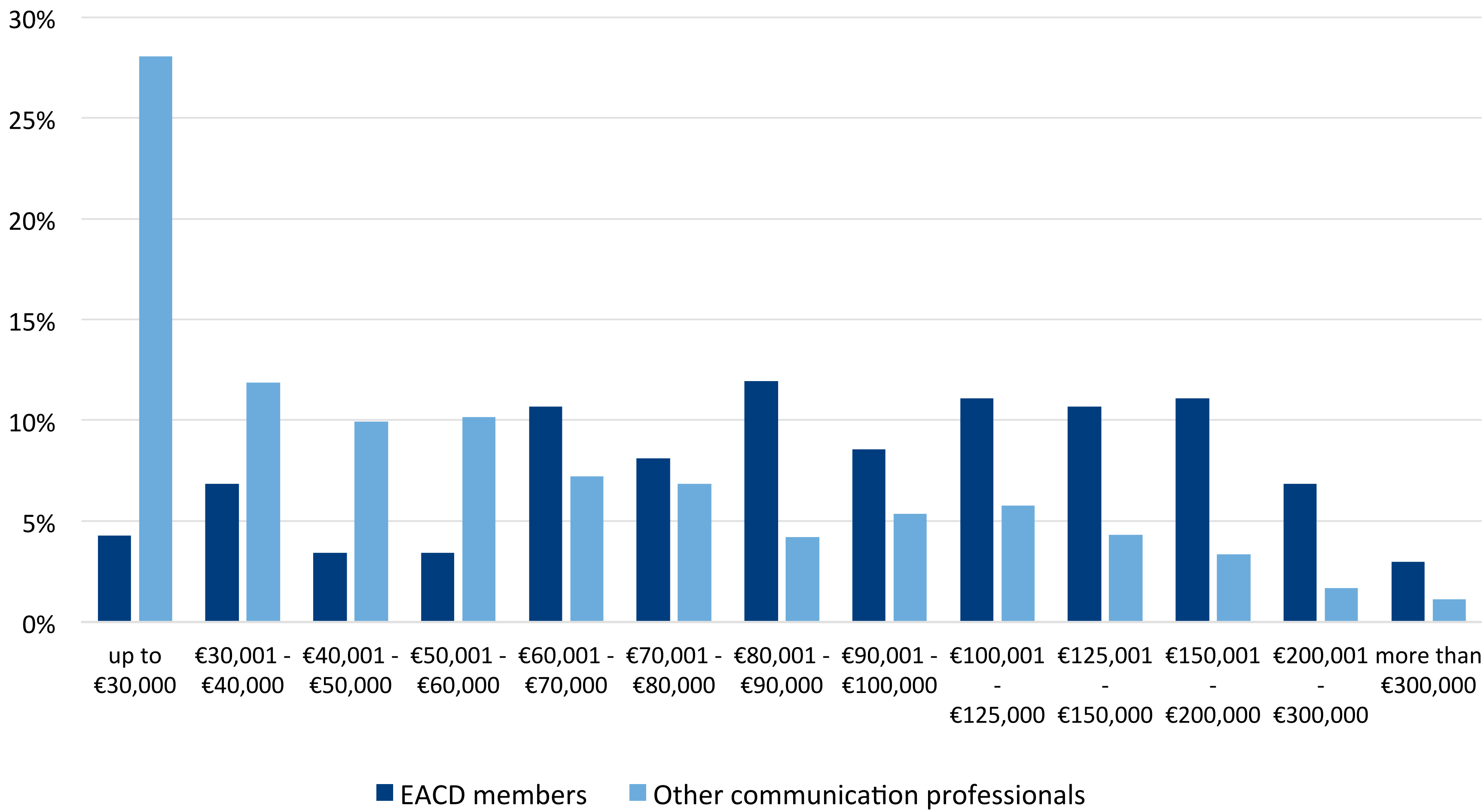
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,611 PR professionals from 20 countries. Q 33: In which of the following bands does your basic annual salary fall?

Annual salaries in different European countries in detail

	Up to €30.000	€30,001 - €60,000	€60,001 - €100,000	€100,001 - €150,000	More than €150,000		Up to €30.000	€30,001 - €60,000	€60,001 - €100,000	€100,001 - €150,000	More than €150,000
Germany	4.8%	27.5%	29.3%	20.4%	18.0%	Norway	1.6%	9.4%	60.9%	17.2%	10.9%
Austria	7.5%	37.3%	41.8%	9.0%	4.5%	Finland	–	48.3%	33.3%	11.7%	6.7%
Switzerland	1.3%	1.3%	13.8%	43.8%	40.0%	Spain	7.6%	48.9%	28.3%	10.9%	4.3%
France	4.8%	40.5%	35.7%	11.9%	7.1%	Portugal	26.1%	34.8%	34.8%	2.2%	2.2%
Belgium	7.7%	37.2%	32.1%	14.1%	9.0%	Italy	15.7%	33.9%	29.6%	11.3%	9.6%
Netherlands	3.6%	23.6%	43.6%	24.5%	4.5%	Slovenia	51.8%	34.1%	11.8%	1.2%	1.2%
United Kingdom	2.5%	29.4%	37.8%	15.1%	15.1%	Croatia	67.0%	22.7%	8.0%	1.1%	1.1%
Ireland	2.0%	20.4%	46.9%	24.5%	6.1%	Turkey	31.8%	40.9%	9.1%	9.1%	9.1%
Denmark	2.0%	28.0%	44.0%	20.0%	6.0%	Romania	76.5%	18.6%	2.0%	2.9%	–
Sweden	2.2%	49.5%	35.2%	5.5%	7.7%	Ukraine	74.2%	17.7%	4.8%	1.6%	1.6%

www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,611 PR professionals from 20 countries. Q 33: In which of the following bands does your basic annual salary fall?

EACD members enjoy a comparatively high annual salary



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,895 PR professionals. Q 33: In which of the following bands does your basic annual salary fall? Q 31: Are you a member of a professional organisation? Highly significant differences (chi-square test, p ≤ 0.01, Cramér's V = 0.298).

Characteristics of excellent communication functions

Chapter overview

The ECM 2014 introduced a new method to identify excellent communication functions (Zerfass et al., 2014: 132-149; Verčič & Zerfass, 2015), combining conceptual considerations with self-assessments of communication professionals and statistical analyses to identify the characteristics which make a difference. The method was applied again this year to divide between organisations with excellent communication functions (Grunig, 1992; Grunig et al., 2002) and all other organisations. Excellence is based on the internal standing of the communication function within the organisation (influence) and external results of the communication function's activities as well as the function's basic qualifications (performance). Each of these two components were calculated on the basis of four dimensions, the first on advisory influence (where senior managers take the recommendations of the communication function seriously) and executive influence (where communication will likely be invited to senior-level meetings dealing with organisational strategic planning), and the second on overall communication success (where the communication of the organisation is successful) and department competence (where the quality of the communication function is better compared to those of competing organisations). Only organisations clearly outperforming in all four dimensions are considered as excellent in the benchmark exercise. This year we identified nearly the same percentage of excellent communications functions (23.0 per cent 2015) like in the 2014 monitor survey (21.2 per cent) (Zerfass et al., 2014: 135).

Excellent communication departments use mass media and their products more frequently, they help to reach overall goals more often than other communication functions/departments, they have professionals with higher levels of experience in evaluation practices, and they are more active in using insights from communication measurement in their organisations. They are also more likely to, and will with increased frequency, collaborate with other functions and departments within the organisation.

Interestingly, excellent communication departments also hire agencies and consultancies for different reasons than other communication functions. They hire support more often for creativity and innovation, expertise regarding specific geographies or markets, strategic insight, objective counsel and for explaining / understanding communication trends and new instruments. Other, non-excellent departments more often hire agencies because they are not allowed to hire additional staff internally, because agencies are cheaper than adding staff, so they are saving money. Excellent departments take the lead in organisational listening within their organisations and they also engage with more techniques for listening. Excellent departments are more likely to have listening strategies (73.3 per cent) when compared with other communication functions (50.1 per cent), and they use more advanced methods of listening and define listening objectives.

Last but not least, an important attribute of excellence as identified by this study is the ability to explain the value of communication to top executives by using arguments related to economic success and the benefit of listening to stakeholders. While excellent departments use all modes of explanation more intensively, they differentiate most in those two dimensions and in the recollection of threats caused by troubled relationships and crises. This indicates that communication management has to be conceptualised as a strategic discipline, incorporating both messaging and listening, with a clear commitment to demonstrate and evaluate the contribution to overall organisational goals.

Identifying excellent communication functions

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

EXCELLENCE

Communication functions in organisations which outperform others in the field

INFLUENCE

Internal standing of the communication function within the organisation

PERFORMANCE

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

ADVISORY INFLUENCE

(Q22)

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

EXECUTIVE INFLUENCE

(Q23)

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

SUCCESS

(Q24)

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

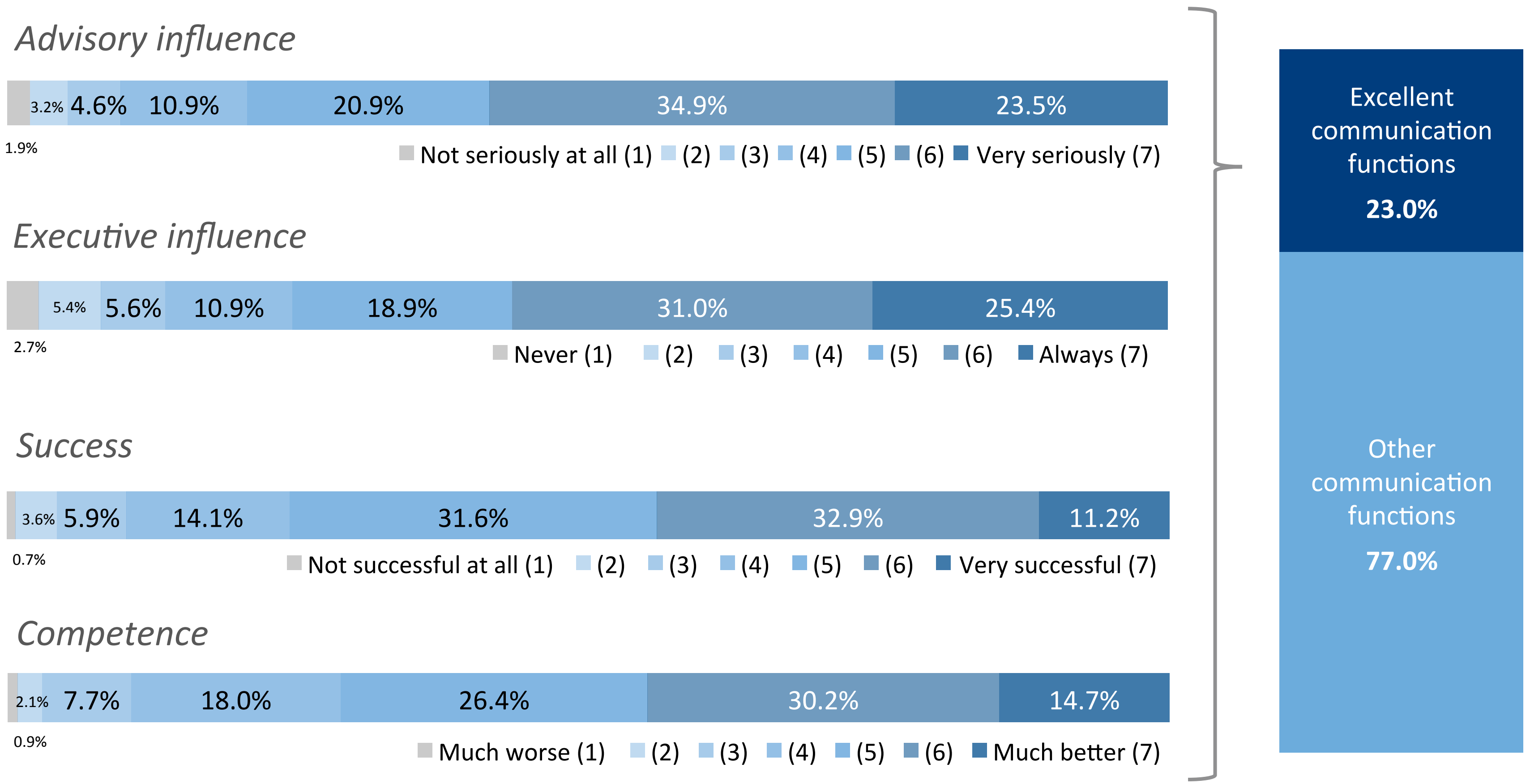
COMPETENCE

(Q25)

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

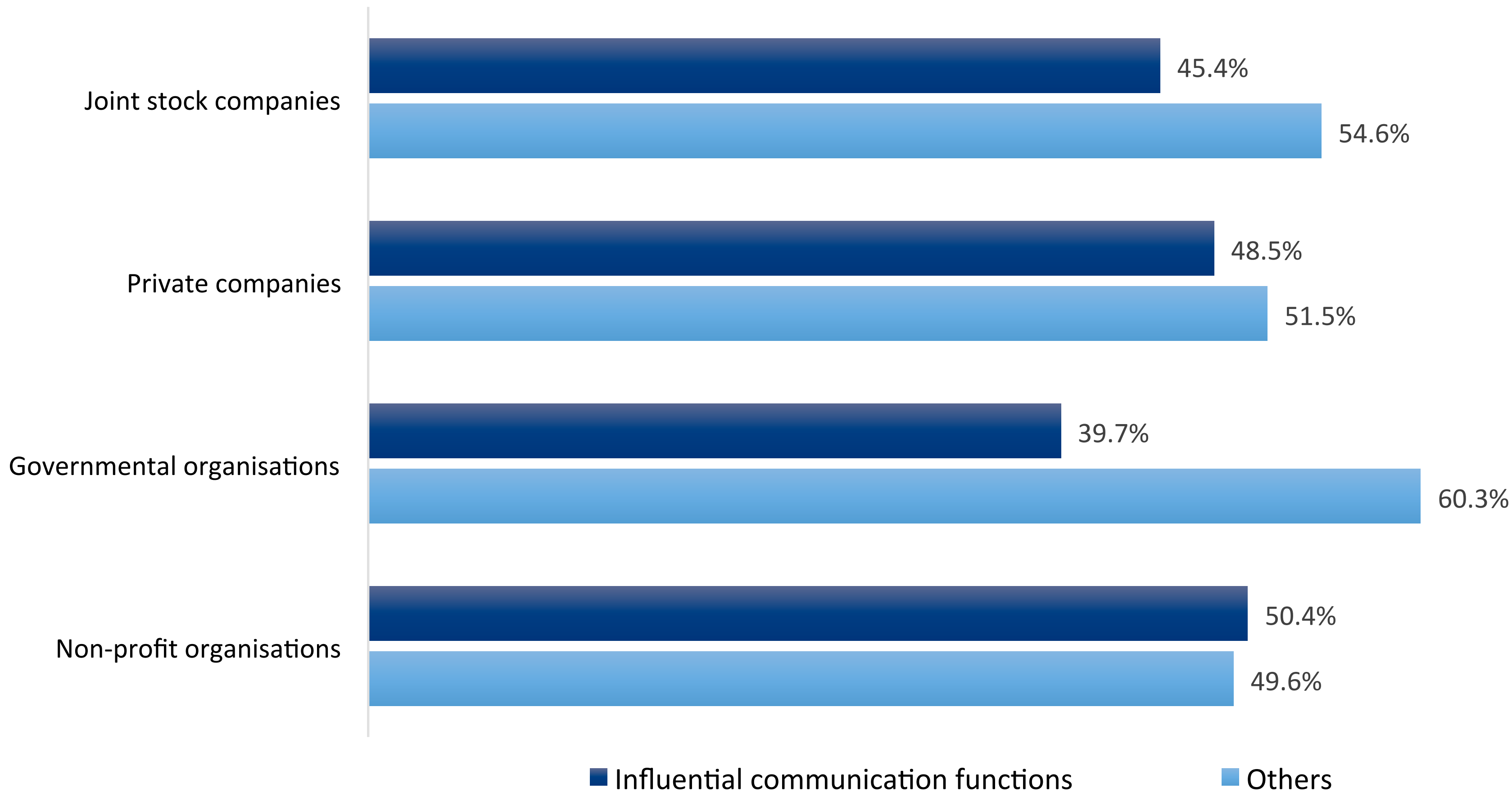
www.communicationmonitor.eu / Zerfass et al. 2015 / Only organisations outperforming in all four dimensions (scale points 6-7 on a 7-point-scale) will be considered as "excellent" in the benchmark exercise comparing distribution and characteristics of organisations, functions and communication professionals.

Excellent communication functions



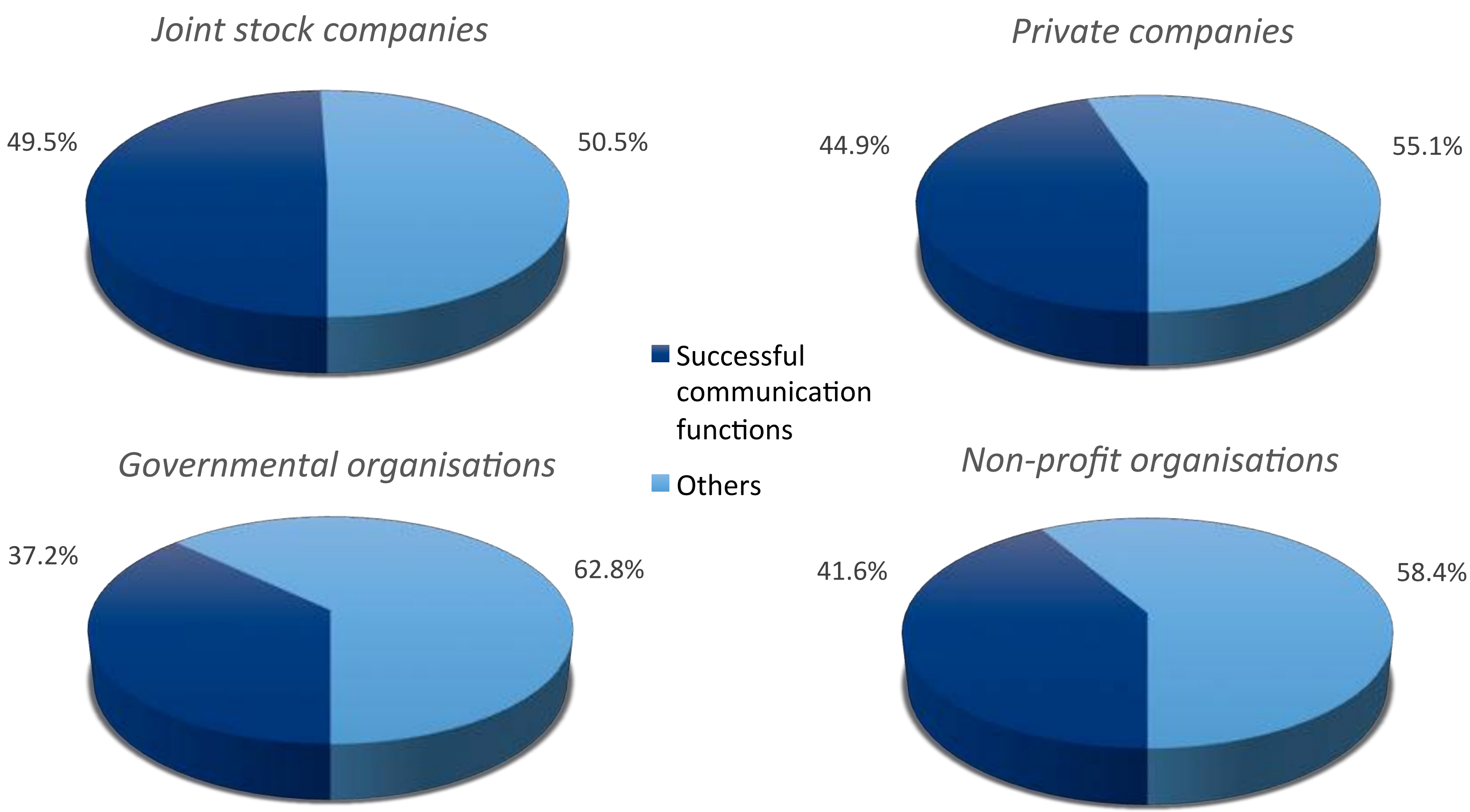
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professionals in communication departments. Advisory influence, Q 22: In your organisation, how seriously do senior managers take the recommendations of the communication function? Executive influence, Q 23: How likely is it that communication would be invited to senior-level meetings dealing with organisational strategic planning? Success, Q 24: In your opinion, how successful is the communication of your organisation in general? Competence, Q 25: How would you estimate the quality and ability of the communication function in your organisation compared to those of competitors? Scale 1 – 7 (wording see above). Percentages: Excellent communication functions based on scale points 6-7 for each question.

Influential communication functions: Non-profit organisations are leading the field



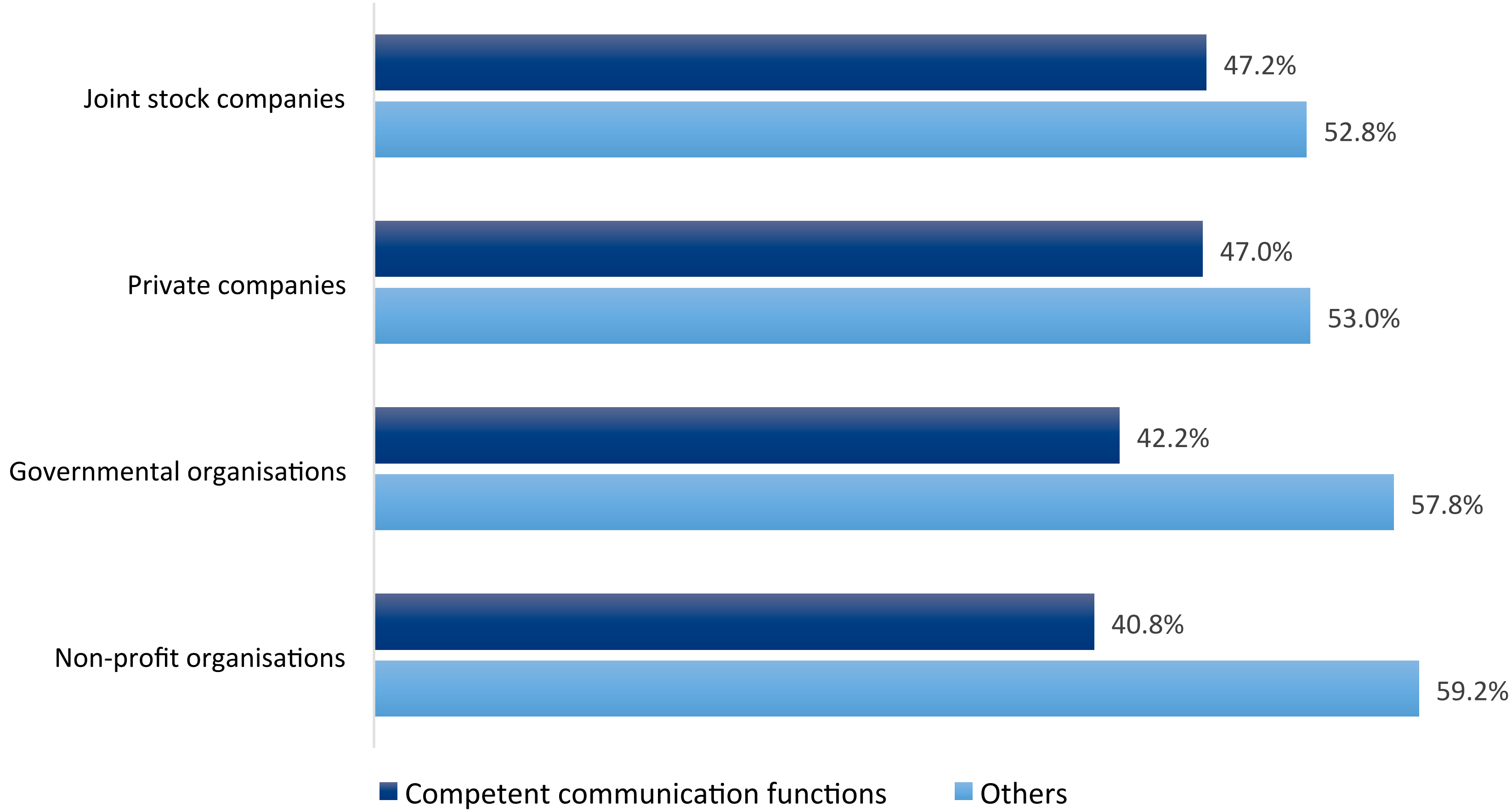
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professionals in communication departments. Advisory influence, Q 22: In your organisation, how seriously do senior managers take the recommendations of the communication function? Scale 1 (not seriously) – 7 (very seriously). Executive influence, Q 23: How likely is it that communication would be invited to senior-level meetings dealing with organisational strategic planning? Scale 1 (never) – 7 (always). Percentages: Influential communication functions, based on scale points 6-7.

Successful communication functions: companies are clearly ahead of other types of organisation



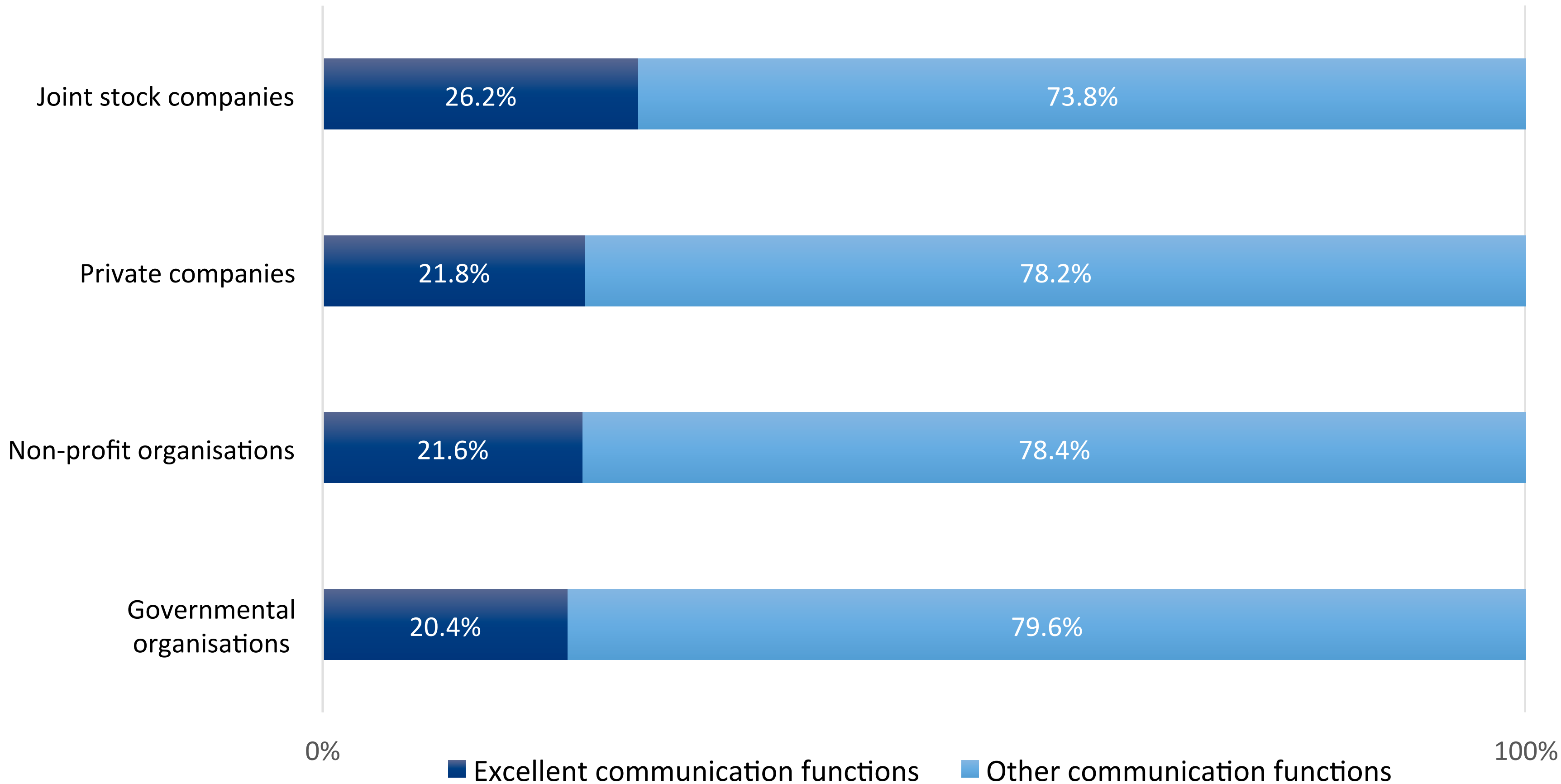
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professionals in communication departments. Q 24: In your opinion, how successful is the communication of your organisation in general? Percentages: Successful organisational communication based on scale points 6-7. Highly significant differences (chi-square test, p ≤ 0.01, Cramér's V = 0.097).

Competent communication functions: better quality and ability is most prevalent in corporations



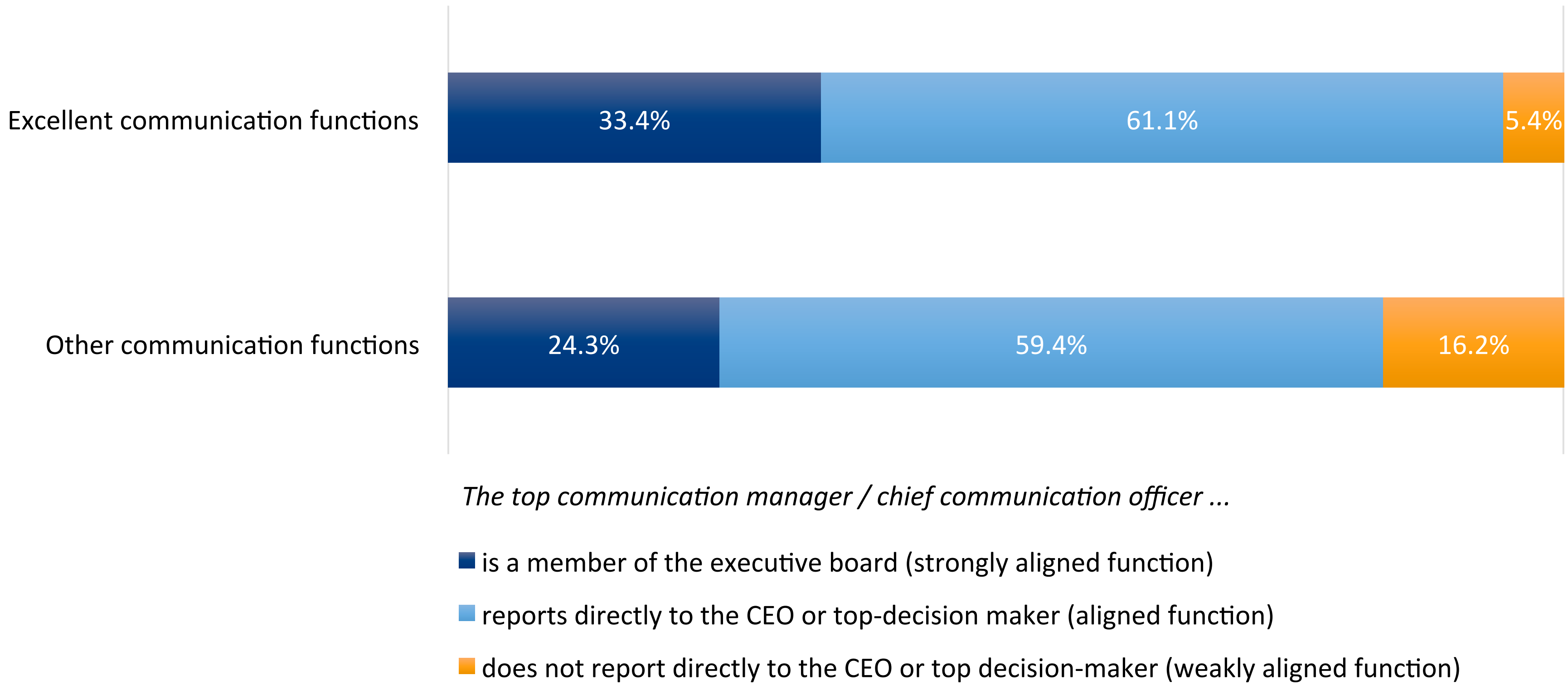
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professionals in communication departments. Q 25: How would you estimate the quality and ability of the communication function in your organisation compared to those of competitors? Percentages: Competent communication functions based on scale points 6-7.

Excellent communication functions in different types of organisations



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professionals in communication departments across Europe. Excellence based on advisory and executive influence of the communication function within the organisation and its performance (success and competence); see page 108.

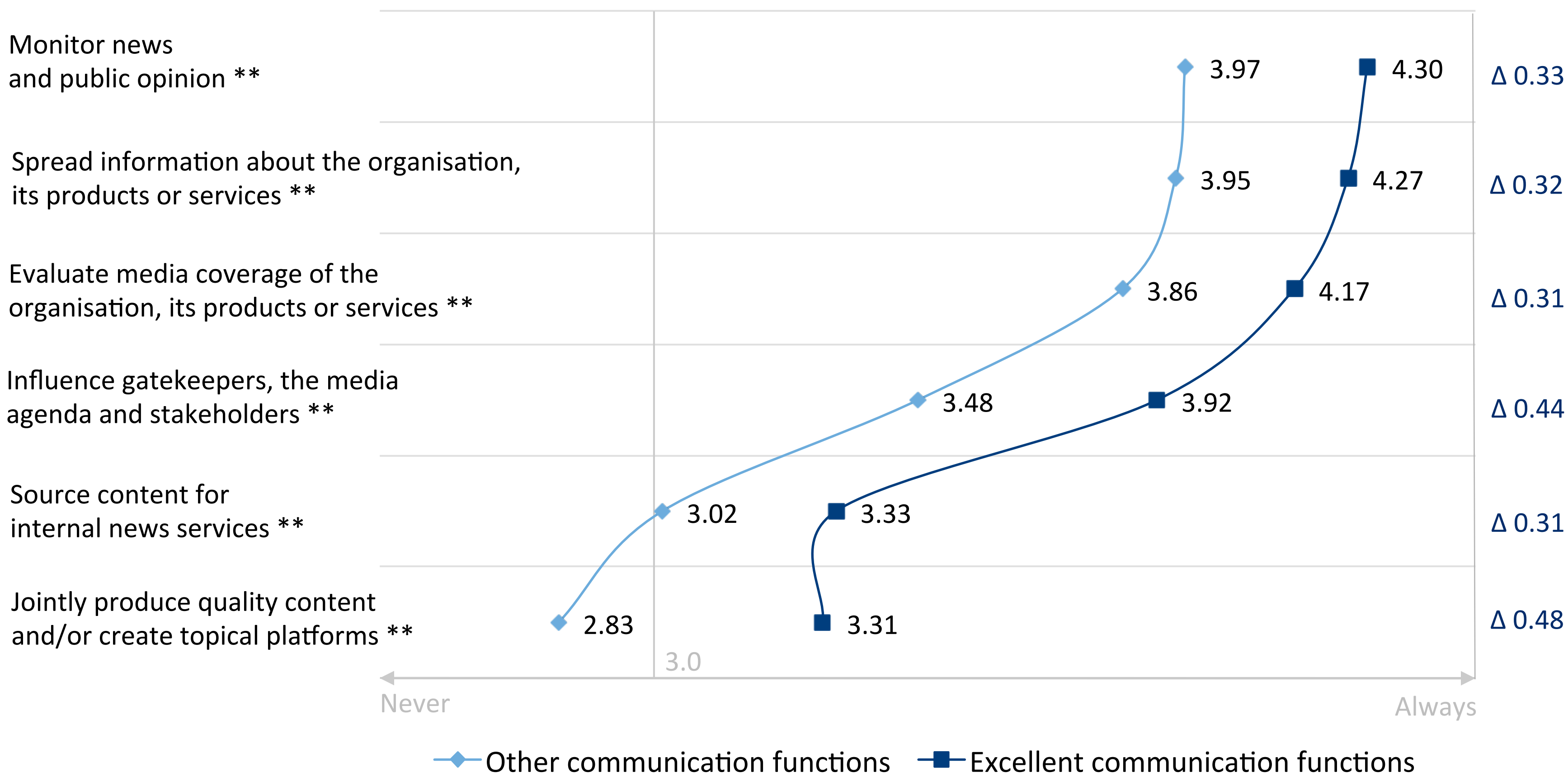
Alignment of the communication function: Significant differences between excellent departments and others



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professionals in communication departments across Europe. Q 21: Within your organisation, the top communication manager or chief communication officer … is a member of the executive board (strongly aligned)/ reports directly to the CEO or highest decision-maker on the executive board (aligned) / does not report directly to the CEO or highest decision-maker (weakly aligned). Highly significant differences (Kendall rank correlation, $p \leq 0.01$, $\tau = 0.126$).

Excellent communication departments collaborate more intensively with the mass media, especially in producing joint content

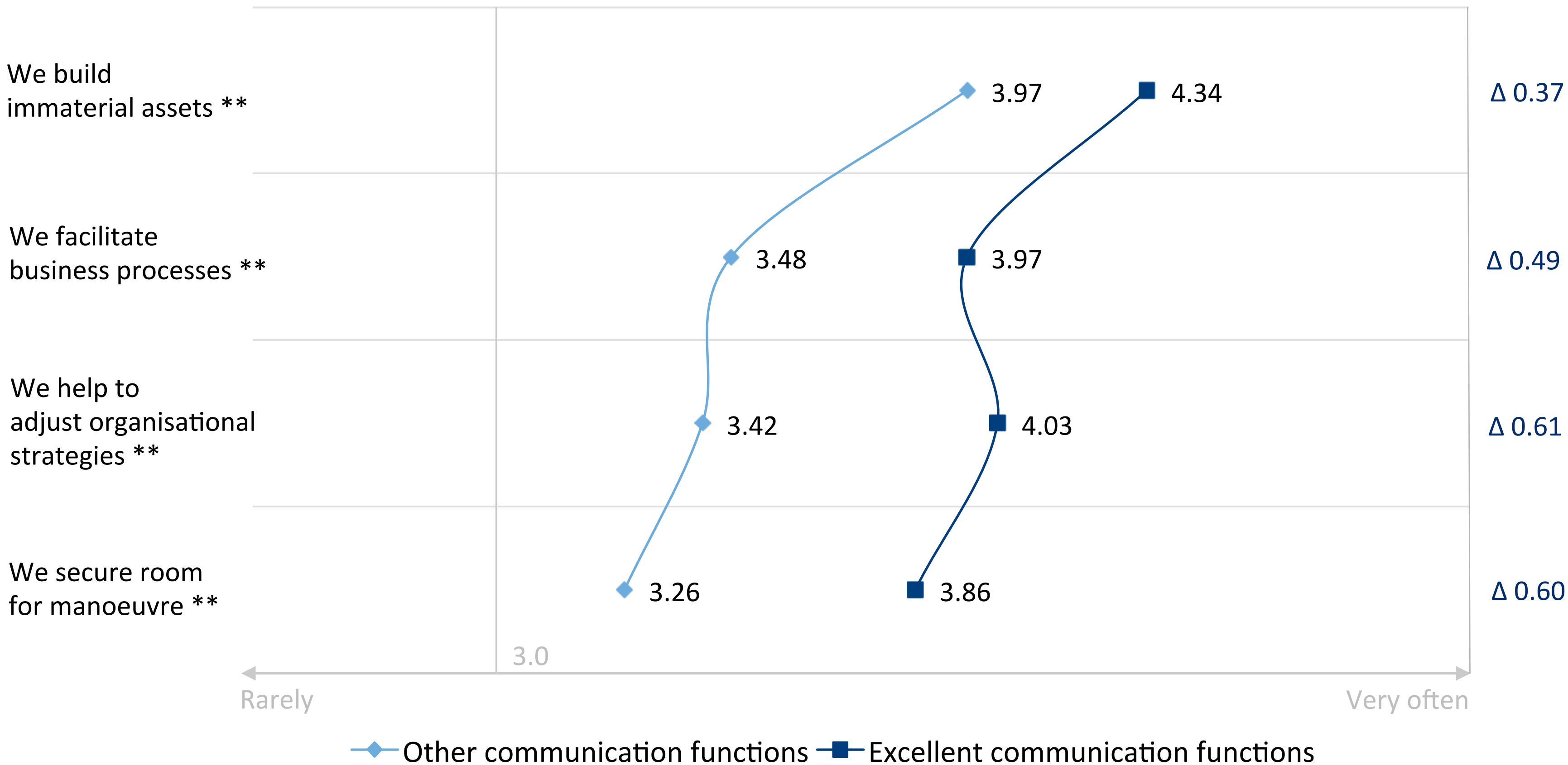
Rationales for working with the mass media



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,589 PR professionals in communication departments. Q 2: Why does your organisation interact with the mass media? My organisation use mass media and their products to … Scale 1 (Never) – 5 (Always). Mean values. ** Highly significant differences (Pearson correlation, p ≤ 0.01). * Significant differences (Pearson correlation, p ≤ 0.05).

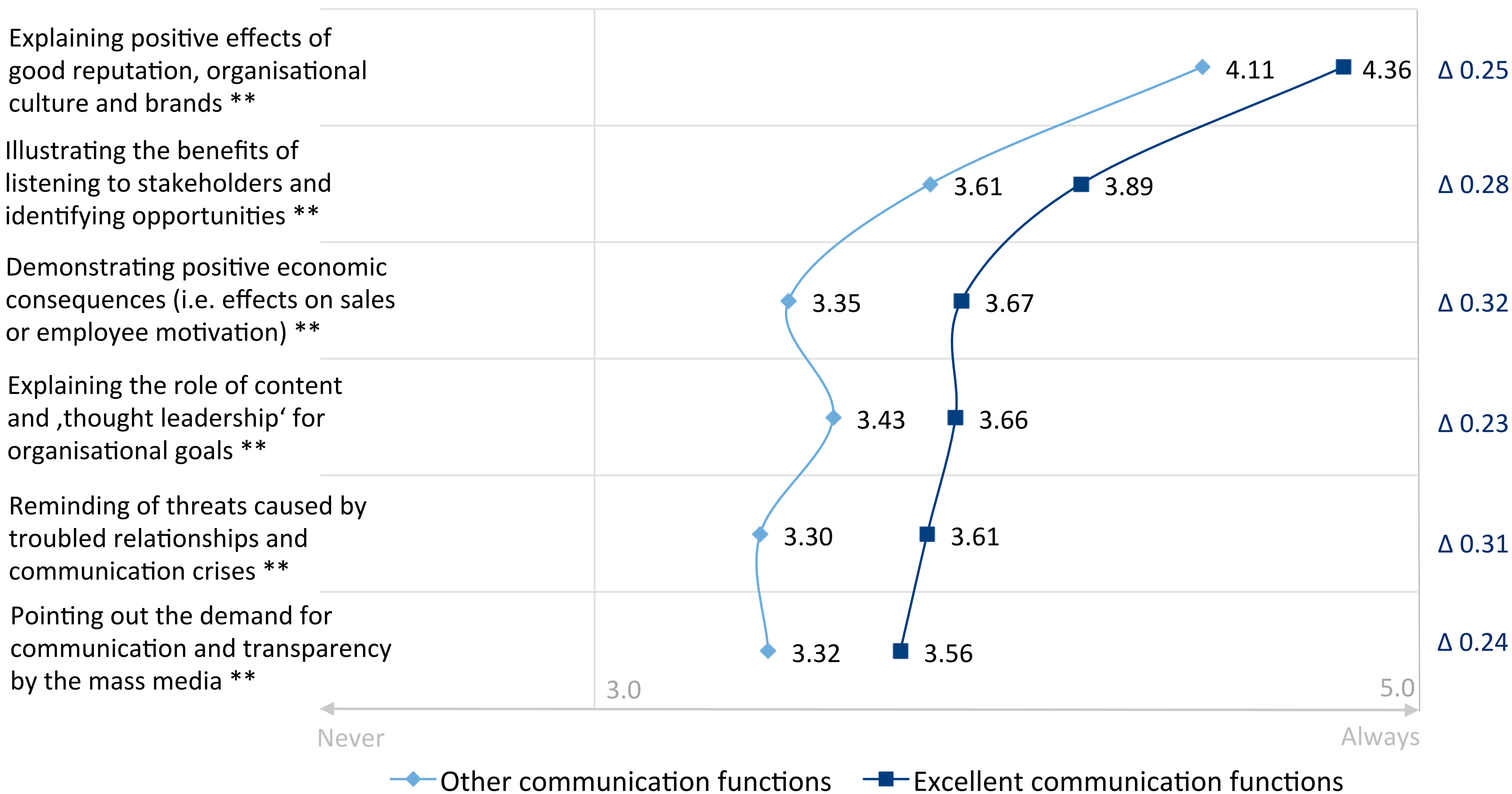
Excellent communication departments are strongly convinced that they contribute to overall organisational goals

How communication helps to reach overall objectives



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,600 PR professionals in communication departments. Q 7: How do you and your department help to reach the overall goals of your organisation? Scale 1 (Rarely) – 5 (Very often). Mean values. ** Highly significant differences (Pearson correlation, p ≤ 0.01). * Significant differences (Pearson correlation, p ≤ 0.05).

Explaining the value of communication: excellent departments use arguments related to economic success, threats and benefits of listening more often



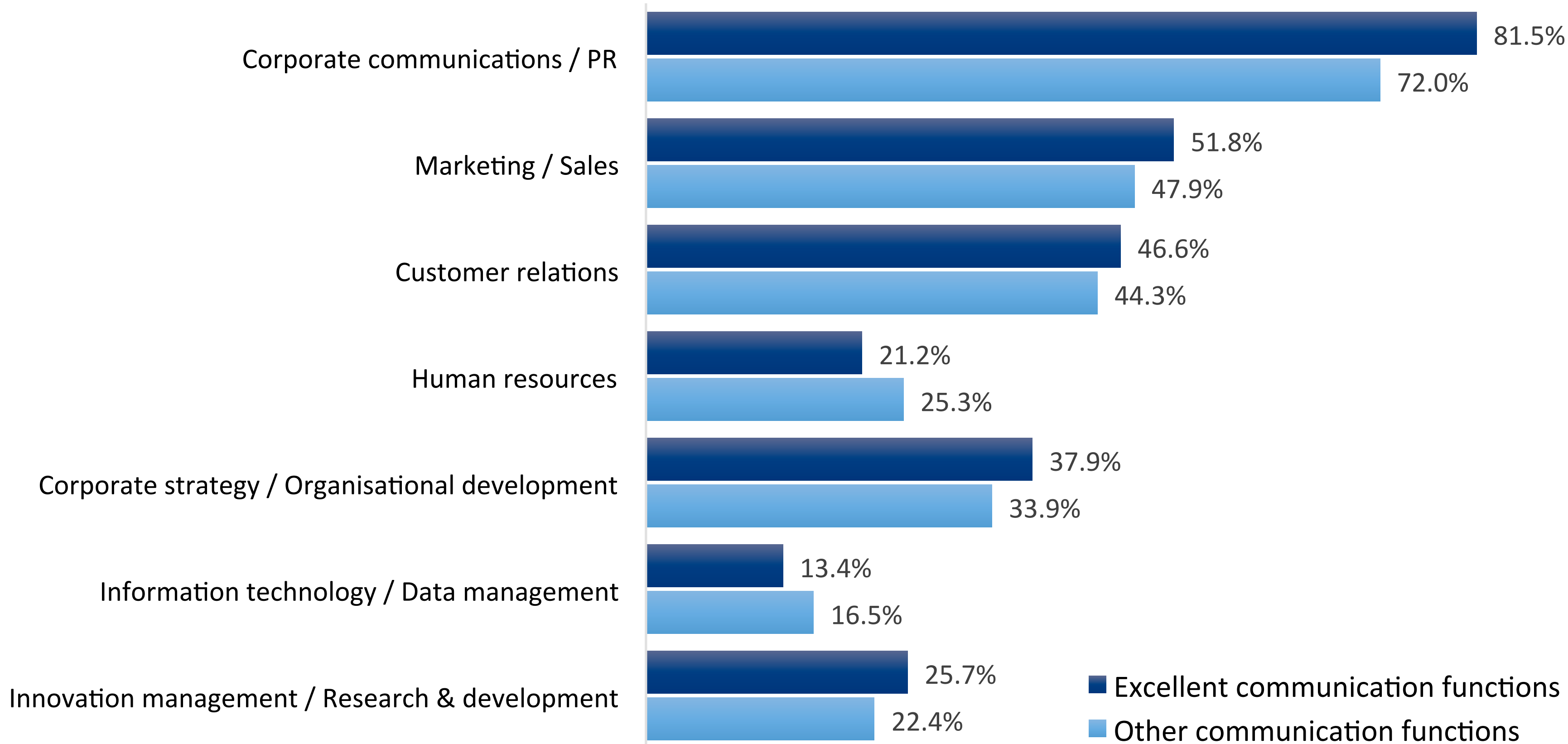
www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professionals in communication departments. Q 6: How do you usually argue for the relevance of strategic communication when addressing top executives and (internal) clients? Scale 1 (Never) – 5 (Always). Mean values.
** Highly significant differences for all items (Pearson correlation, p ≤ 0.01).

Formal strategies are more prevalent in excellent communication departments; listening strategies are implemented more often

www.communicationmonitor.eu / Zerfass et al. 2015 / n ^{min} = 1,487 PR professionals in communication departments. Q 8: Does your organisation have one or more of the following strategies? Scale 1 (Yes) – 2 (No) – 3 (Don't know). Percentages: Based on agreement to each item. Highly significant differences for all items (chi-square test, $p \leq 0.01$).

Excellent departments claim to take the lead in organisational listening

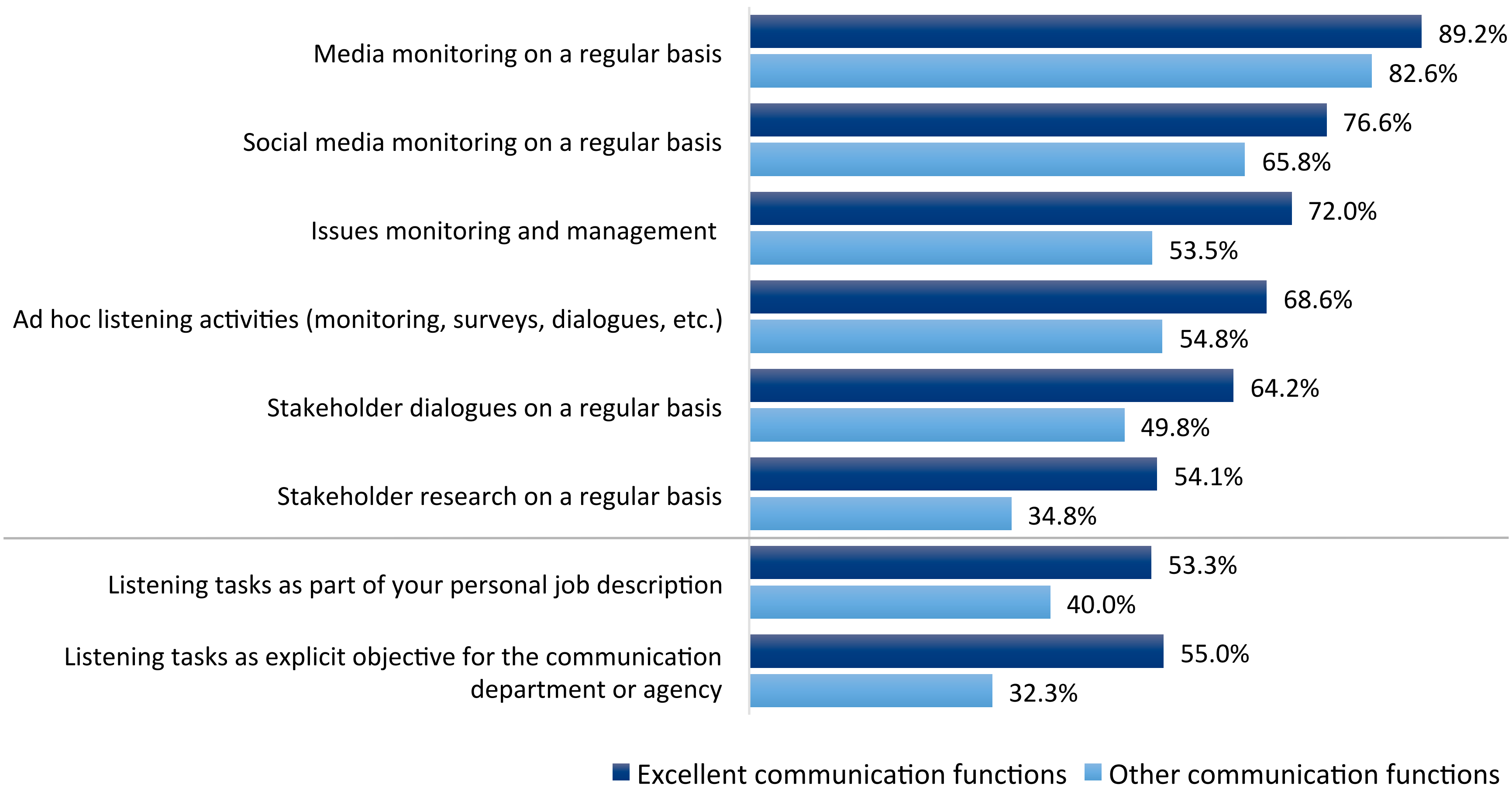
Organisational functions who are forerunners in listening to stakeholders



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,442 PR professionals in communication departments. Q 9: Which three (3) functions in your organisation are forerunners in systematically listening to their respective stakeholders (based on competencies, experiences, strategies, and instruments implemented)? Max. 3 selections per respondent.

Organisational listening: excellent departments use a greater number of techniques as well as applying more advanced modes of listening

Structures and techniques implemented



www.communicationmonitor.eu / Zerfass et al. 2015 / n min = 1,406 PR professional in communication departments. Q 10: Which of the following [listening objectives and instruments] have been implemented in your organisation? Percentages: Based on agreement to each item. Highly significant differences for all items (Kendall rank correlation, p ≤ 0.01).

Communication measurement: excellent departments monitor and evaluate more intensively; they are much better in assessing business impact

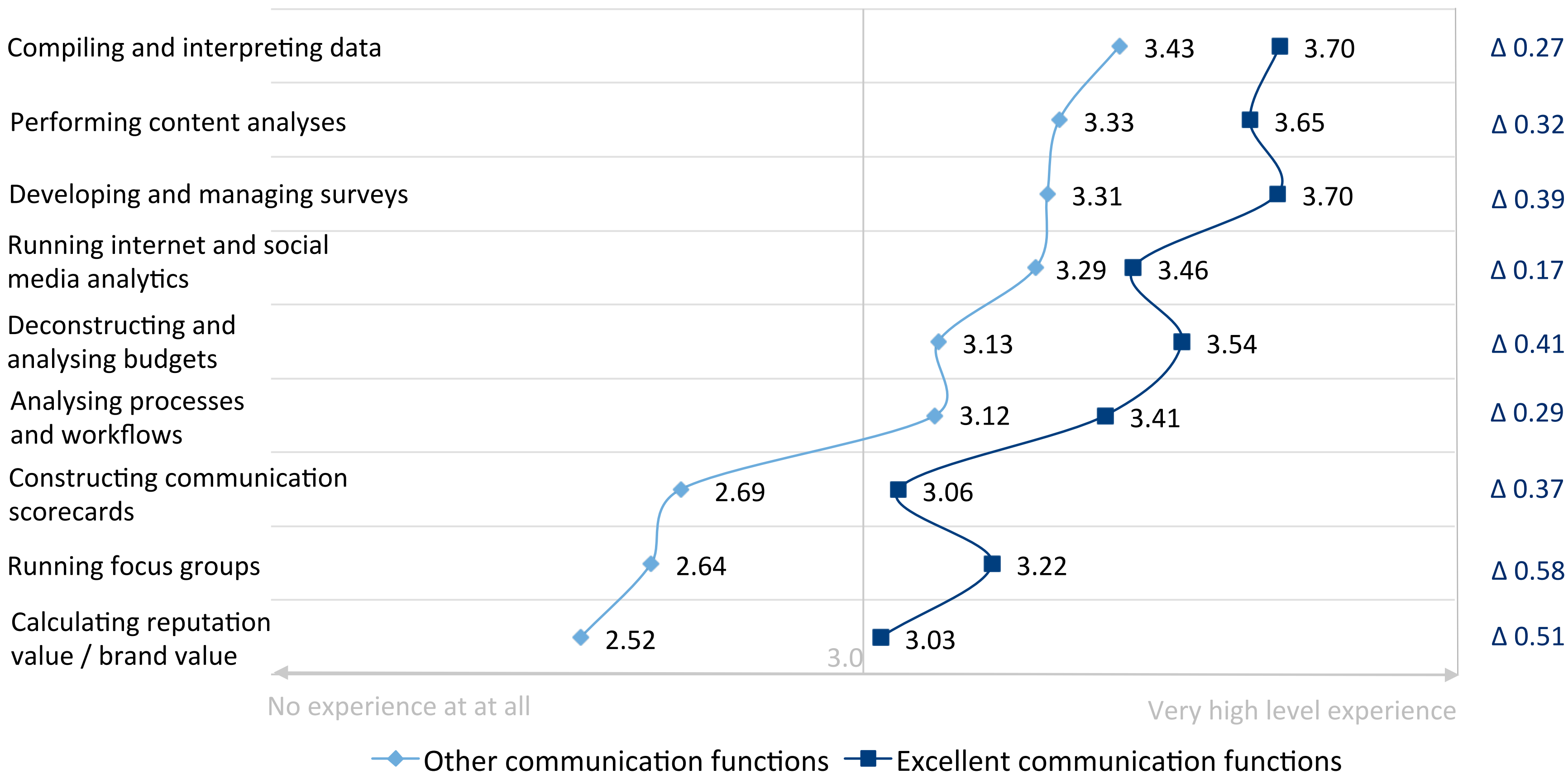
Items monitored or measured	Excellent communication functions	Other communication functions	Δ
Impact on intangible/tangible resources (i.e. economic brand value)	3.30	2.79	0.51
Impact on financial/strategic targets (i.e. with scorecards, strategy maps)	3.44	2.85	0.59
Stakeholder attitudes and behaviour change	3.73	3.15	0.58
Understanding of key messages	3.94	3.27	0.67
Clippings and media response	4.61	4.25	0.36
Internet / Intranet usage	4.21	3.84	0.37
Satisfaction of internal clients	3.99	3.48	0.51
Process quality (internal workflow)	3.40	2.94	0.46
Financial costs for projects	4.07	3.85	0.22
Personnel costs for projects	3.41	3.12	0.29

Input Output Outcome Outflow

www.communicationmonitor.eu / Zerfass et al. 2015 / n^{min} = 1,496 professionals in communication departments. Q 12: Which items are monitored or measured by your organisation to assess the effectiveness of communication management / public relations? Scale 1 (Do not use at all) – 5 (Use continuously). Mean values. Highly significant differences for all items (Pearson correlation, p ≤ 0.01).

Measurement and evaluation skills: professionals working in excellent departments are more experienced

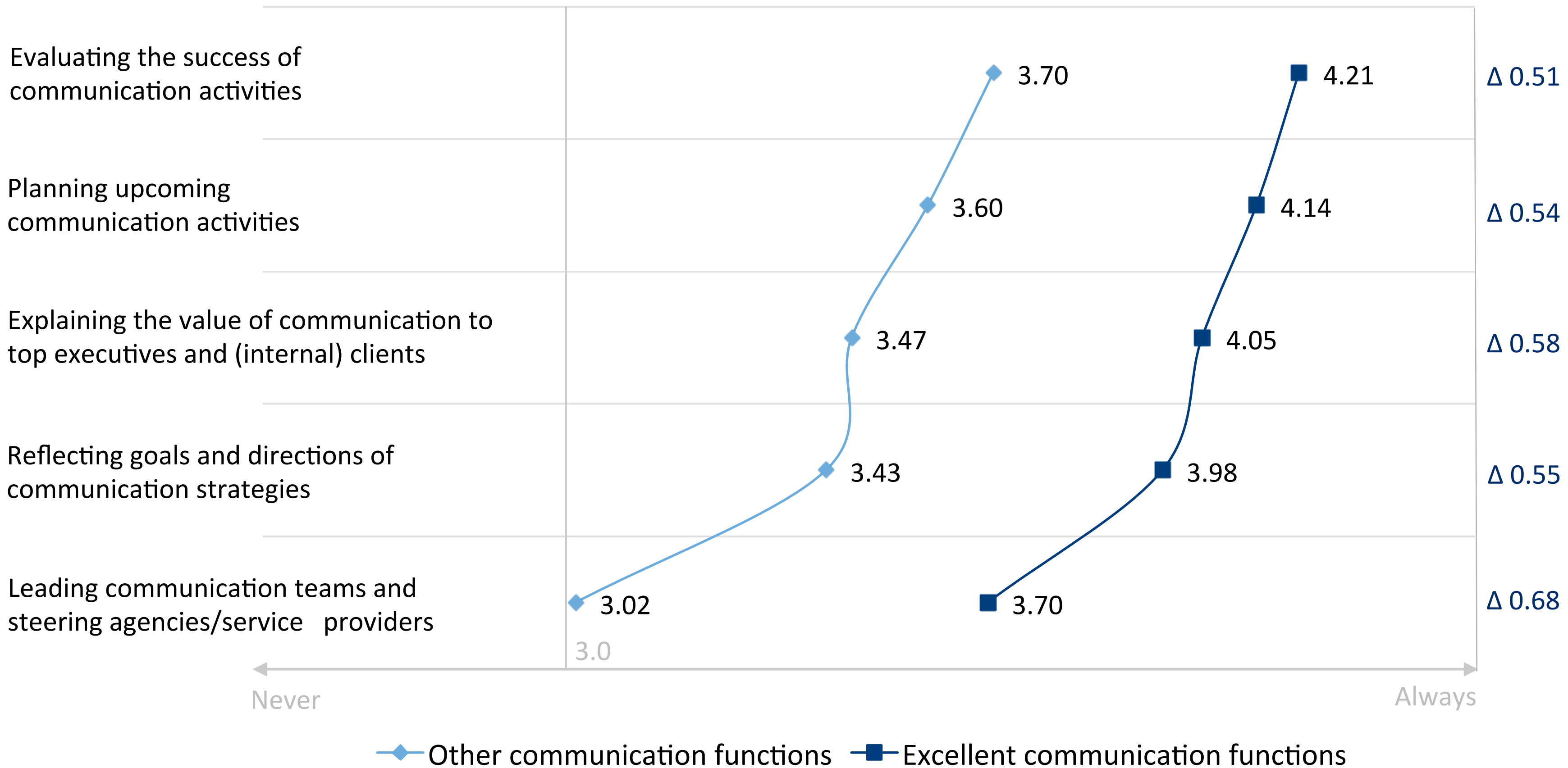
Personal capabilities in communication measurement



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,430 PR professional in communication departments. Q 13: How would you rate your personal capabilities in the following areas? Scale 1 (No experience at all) – 5 (Very high level experience). Mean values. Highly significant differences for all items (Pearson correlation, p ≤ 0.01).

Excellent communication departments use measurement insights more frequently for managing their activities

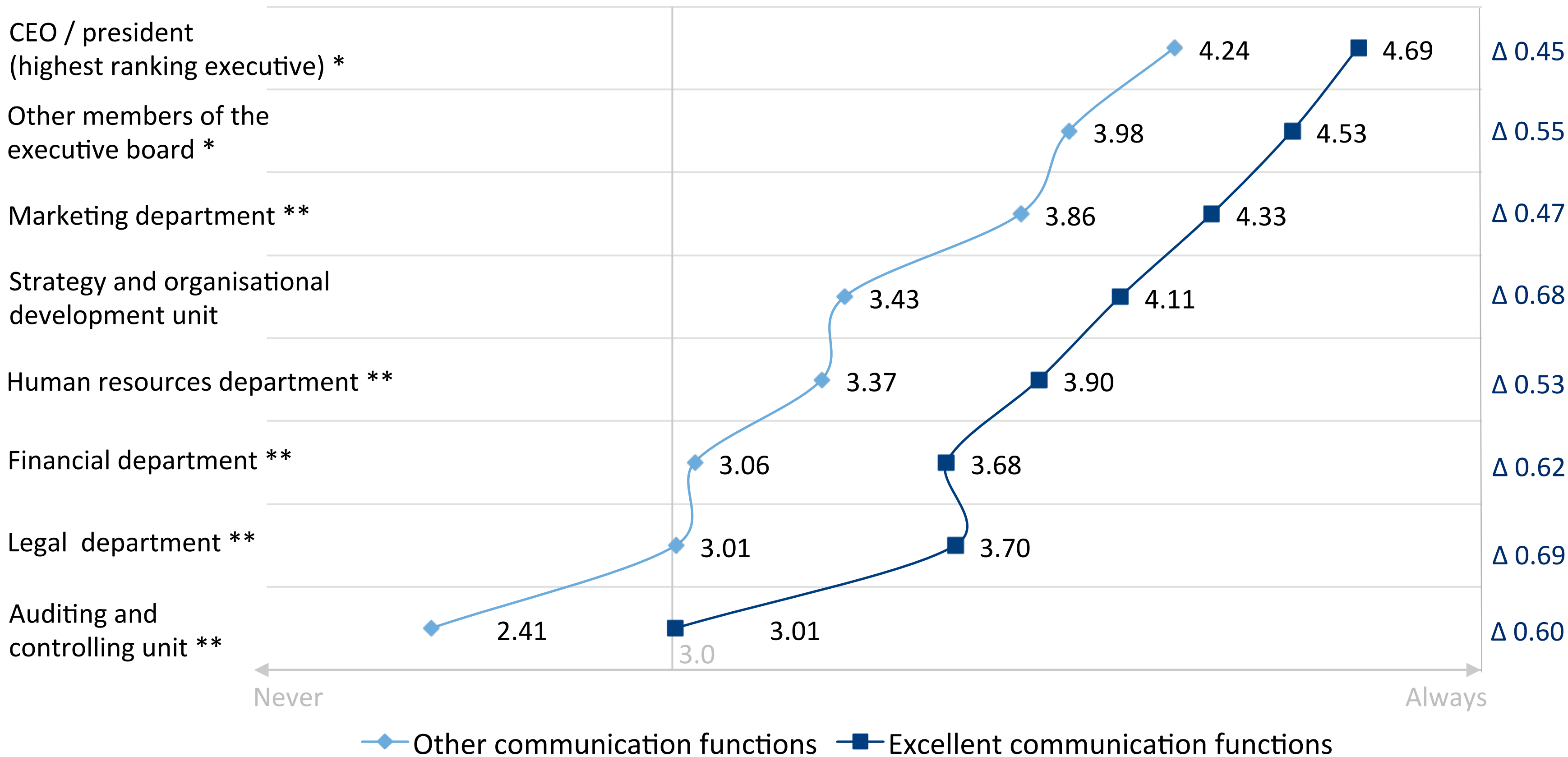
Measurement data and reports are used for ...



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professional in communication departments. Q 14: How are insights from communication measurement used in your organisation? Scale 1 (Never) – 5 (Always). Mean values. ** Highly significant differences for all items (Pearson correlation, p ≤ 0.01).

Excellent departments collaborate more intensively with the board and other organisational functions

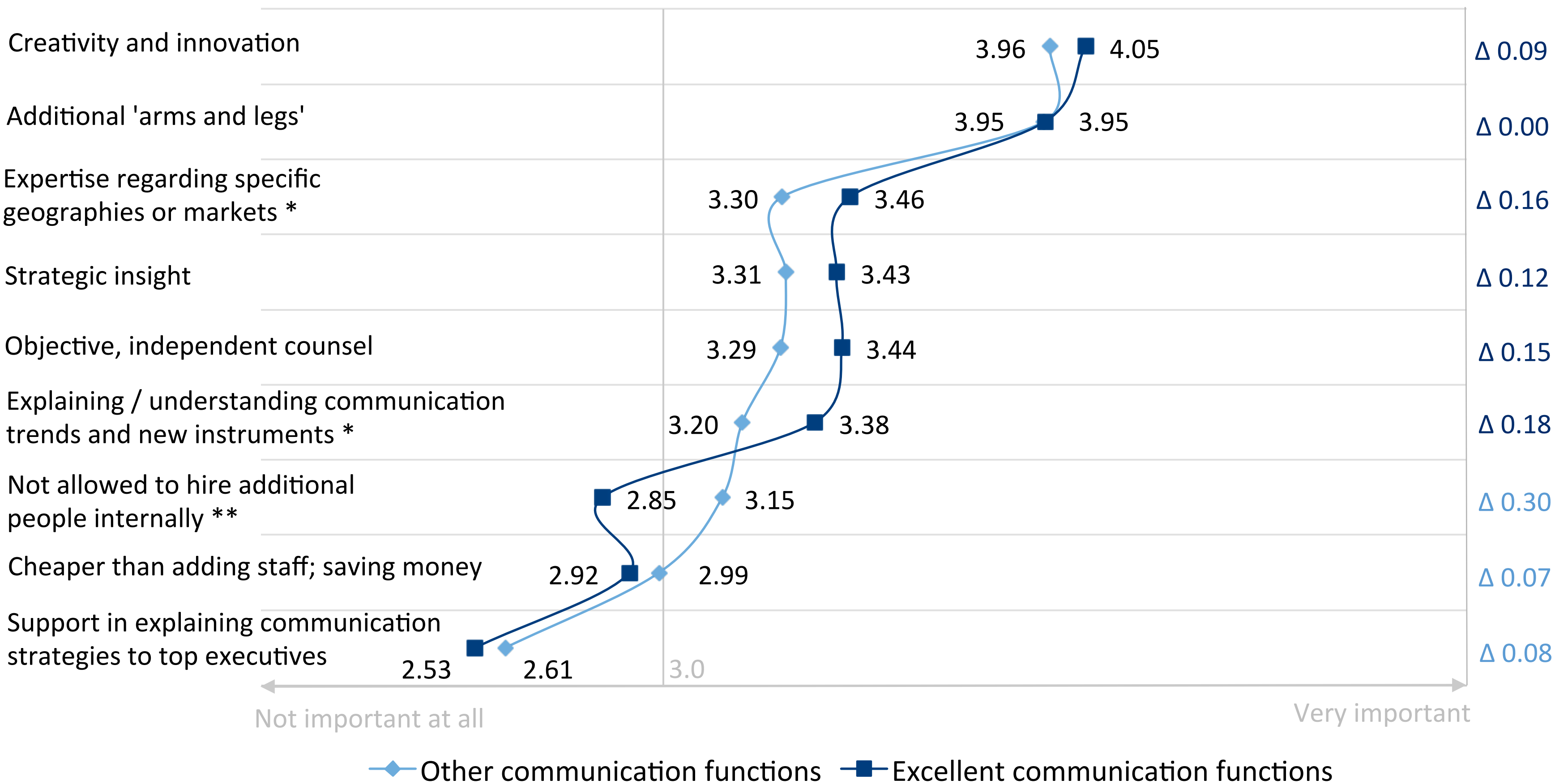
The communication function works always closely with the ...



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,601 PR professional in communication departments. Q 17: How closely does the communication function in your organisation work with the ... Scale 1 (Never) – 5 (Always). Mean values. ** Highly significant differences (Pearson correlation, p ≤ 0.01). * Significant differences (Pearson correlation, p ≤ 0.05).

Departments with excellent communication functions hire agencies for different reasons

Why organisations work with agencies and communication consultants



www.communicationmonitor.eu / Zerfass et al. 2015 / n = 1,277 PR professional in communication departments. Q 19-C: Why does your organisation work with agencies, freelancers and communication consultants? Scale 1 (Not important at all) – 5 (Very important). Mean values. ** Highly significant differences (Pearson correlation, p ≤ 0.01).* Significant differences (Pearson correlation, p ≤ 0.05).

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Survey organisers

European Public Relations Education and Research Association (EUPRERA)

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

www.euprera.org

European Association of Communication Directors (EACD)

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

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Communication Director

Communication Director is a quarterly international magazine for Corporate Communications and Public Relations. It documents opinions on strategic questions in communication, highlights transnational developments and discusses them from an international perspective. The magazine is published by Helios Media, a specialist publishing house based in Berlin and Brussels.

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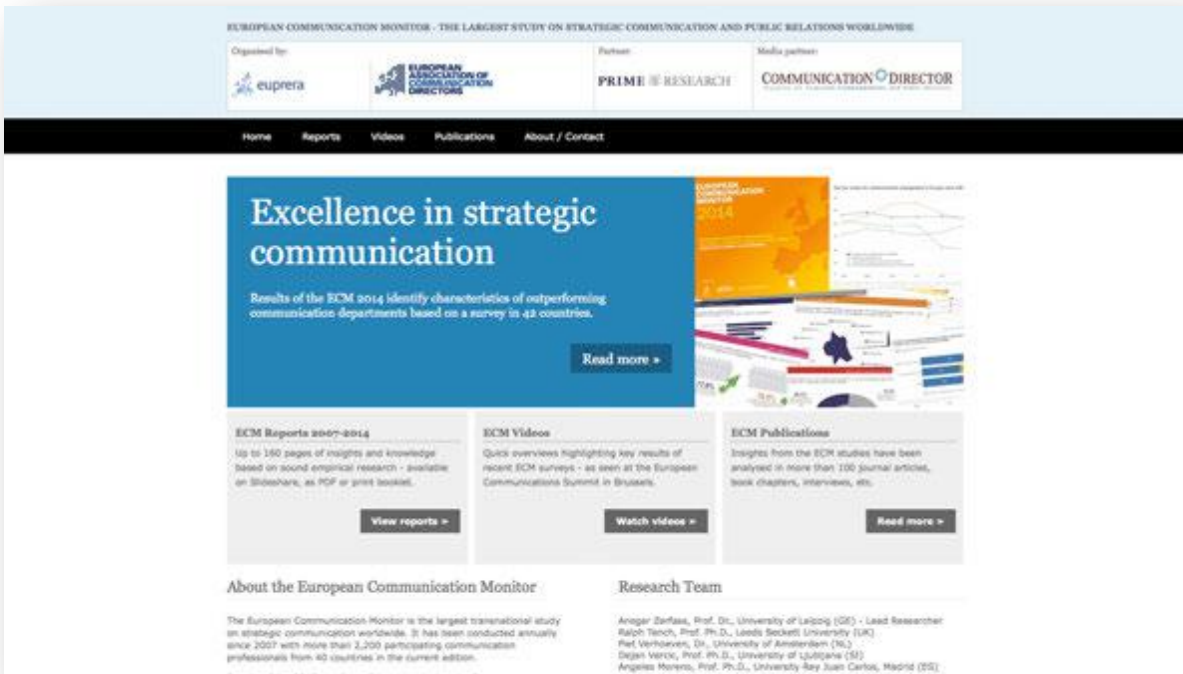
A large selection of reports, videos and publications based on the European Communication Monitor (ECM) surveys from 2007 onwards are available on the internet. Similar surveys are conducted in other regions of the world – the Latin American Communication Monitor and the Asia-Pacific Communication Monitor.



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The annual study is conducted since 2007 with the aim to stimulate and promote the knowledge and practice of communication management across Europe.
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