

EUROPEAN COMMUNICATION MONITOR 2012

CHALLENGES AND COMPETENCIES FOR STRATEGIC COMMUNICATION
RESULTS OF AN EMPIRICAL SURVEY IN 42 COUNTRIES

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EUROPEAN COMMUNICATION MONITOR 2012

CHALLENGES AND COMPETENCIES FOR STRATEGIC COMMUNICATION
RESULTS OF AN EMPIRICAL SURVEY IN 42 COUNTRIES

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

A study conducted by the European Public Relations Education and Research Association (EUPRERA), the European Association of Communication Directors (EACD) and Communication Director magazine

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This set of charts is available as a free PDF document at www.communicationmonitor.eu

The full report (text and charts) is also available as a booklet published by Helios Media, ISBN 978-3-942263-15-3.

Contact:

Please contact any member of the research team or the advisory board in your country or region if you are interested in discussing the insights of this survey or in joint research projects. Questions regarding the overall research may be directed to the lead researcher, Prof. Dr. Ansgar Zerfass, zerfass@uni-leipzig.de

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Foreword



The past year has seen many economic and political upheavals which continue to change the work environment for the communications profession, and the 2012 European Communication Monitor examines the various challenges this volatile context poses for communicators and their daily work.

This year's survey looks for the first time at ethical challenges in communications, a topic that a majority of participants say is more important to them than five years ago. While only 29% of communicators resort to existing professional codes of ethics to address moral problems, 93% see a clear need for them, with national and international professional associations being their preferred providers: a challenge that we as an association must address.

The integration of communication into business strategies continues to be a vital concern for communication professionals, only narrowly topped by digital and social media. For efficient strategic communication, practitioners need to possess a broad set of skills; finding qualified staff constitutes an on-going concern for heads of communication. Management skills are the most sought-after; however, there exists a big gap between demand and supply. While practitioners are confident in analysis, planning and leadership, they are less so in finances, organisation and control. These are important findings that our association will take on board as we discuss qualification and education in our field.

I hope this year's ECM will provide you with valuable insights for your daily business and vocational training – it will certainly continue to inspire our work as a pan-European association.

A handwritten signature in black ink, appearing to read 'Herbert Heitmann', written in a cursive style.

Dr. Herbert Heitmann

President, European Association of Communication Directors (EACD)

Introduction



An increasing number of touchpoints with their publics is forcing many organisations to rethink the practices of strategic communication. For instance shaping the same and consistent image for all stakeholders, a core idea of integrated communications, is nowadays less popular than the concept of polyphony, meaning a simultaneous and sequential stimulation of several perceptions to address different stakeholders. Ethical issues are more prevalent than ever in the field, but current codes of ethics are seldom used and rated as outdated by many professionals. Mobile applications are seen as important tools, however there are large gaps between their perceived importance and real implementation in European organisations.

These are just a few examples of the thought-provoking findings of the European Communication Monitor 2012 presented in this publication. With almost 2,200 participants from 42 countries, the annual survey is the largest study in the practice and the future of communication management and public relations worldwide.

I would like to thank everyone who has participated in the survey. Also, on behalf of the research team and advisory board, I express my gratitude to Anne Ihle and Ronny Fechner for the ongoing support, as well as to our partners EACD and Communication Director magazine, and to our sole sponsor Ketchum Pleon.

A handwritten signature in black ink, appearing to read 'A. Zerfass'.

Prof. Dr. Ansgar Zerfass

*Professor of Communication Management, University of Leipzig, Germany &
Executive Director, European Public Relations Education and Research Association (EUPRERA)*



Research design

Key Facts

European Communication Monitor 2012

- Most comprehensive analysis of communication management and public relations worldwide with 2,185 participating professionals from 42 countries
- Annual research project conducted since 2007 by a group of professors from 11 renowned universities across Europe, led by Prof. Dr. Ansgar Zerfass, University of Leipzig (Germany)
- Organised by the European Public Relations Education and Research Association (EUPRERA), European Association of Communication Directors (EACD) and Communication Director Magazine
- Sponsor: Ketchum Pleon
- Research topics in 2012: Ethical challenges and standards; professional accreditation and certification; practice of communication in organisations; integrating and coordinating communications; strategic issues in communication management; power and influence of the communication function; importance and implementation of social media; digital technology skills; professional training and development; level and sources of management, business and communication qualifications; recruiting young professionals; salaries of communication professionals; comparative analysis (Europe vs. USA) and longitudinal analysis (annual development since 2009) of selected insights



Methodology and demographics

Methodology

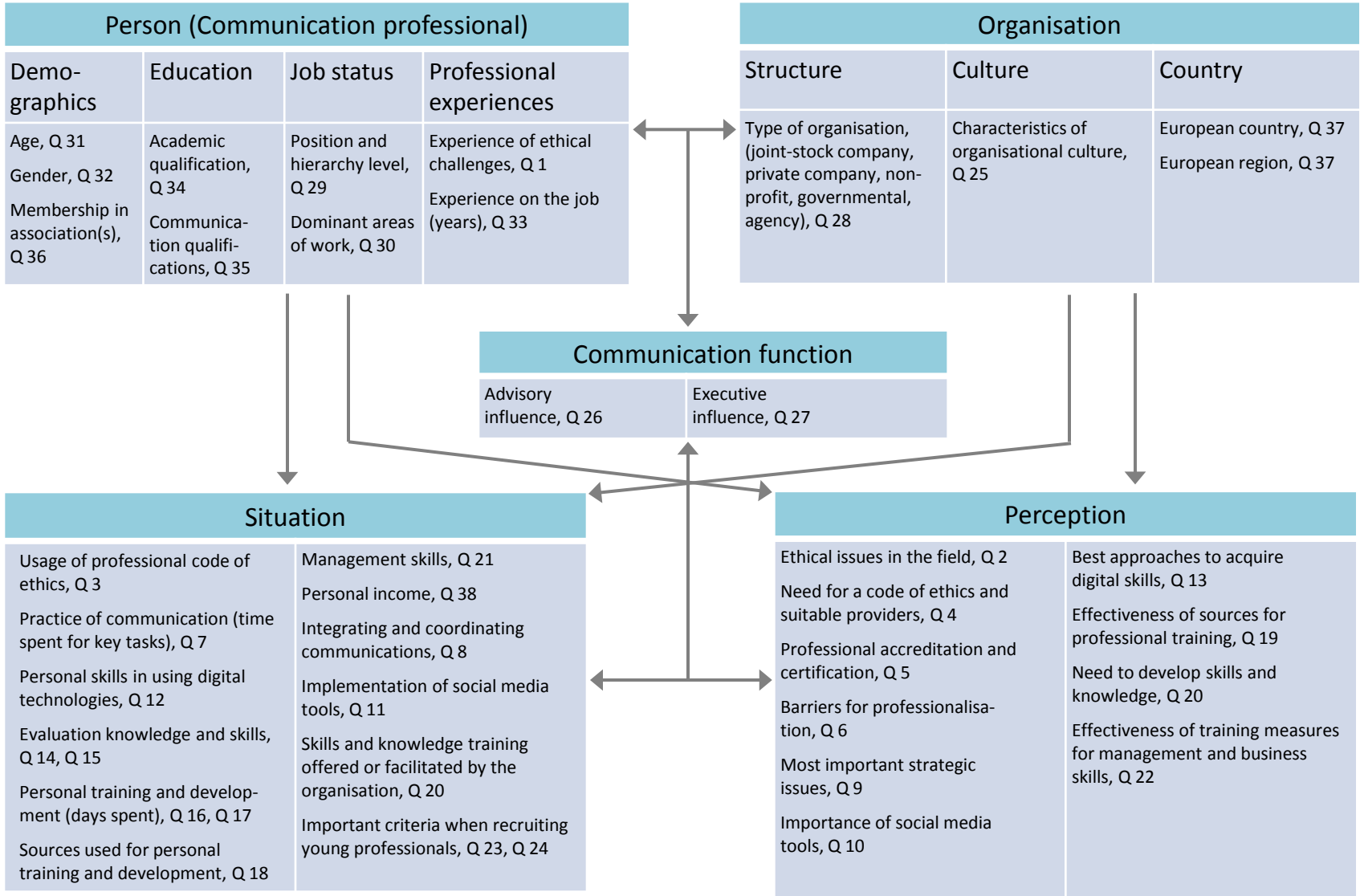
Survey method and sampling

- Online survey in March 2012 (4 weeks), English language
- Questionnaire with 19 sections and 30 questions, based on hypotheses and instruments derived from previous research and literature
- Pre-test with 33 practitioners in 13 European countries
- Personal invitation to 30,000+ professionals throughout Europe via e-mail based on a database provided by EACD; additional invitations to participate via national branch associations and networks (partly self-recruiting); 4,017 respondents and 2,295 fully completed replies
- Evaluation is based on 2,185 fully completed replies by participants clearly identified as part of the population (communication professionals in Europe)

Statistical analysis

- Methods of empirical research, descriptive and analytical analysis (using SPSS)
- Statistical evaluation of agreement has been performed by Pearson's chi-square tests (χ^2), Spearman's rank correlation tests (ρ), Kendall's rank correlation (τ_b), independent samples T-tests or one-way ANOVA/Scheffe post-hoc tests
- Results are classified as * significant ($p \leq 0.05$) or ** highly significant ($p \leq 0.01$) where appropriate; significant correlations are also marked in the footnotes

Research framework and questions



Demographic background of participants

Position

Head of communication, Agency CEO	42.7%
Responsible for single communication discipline, Unit leader	29.0%
Team member, Consultant	20.7%
Other	7.5%

Organisation

Communication department		
▪ joint stock company	29.3%	} 78.4%
▪ private company	19.9%	
▪ government-owned, public sector, political organisation	16.4%	
▪ non-profit organisation, association	12.8%	
Communication consultancy, PR agency, Freelance consultant		21.6%

Job experience

Up to 5 years	16.0%
6 to 10 years	26.3%
More than 10 years	57.7%

Gender / Age

Female	57.6%
Male	42.4%
Age (on average)	41.5 years

Countries and regions represented in the study

Respondents are based in 42 European countries and four regions

Northern Europe 29.6% (n = 646)	Western Europe 30.5% (n = 666)	Eastern Europe 10.7% (n = 234)	Southern Europe 29.2% (n = 639)
Denmark Estonia Finland Iceland Ireland Latvia Lithuania Norway Sweden United Kingdom	Austria Belgium France Germany Luxembourg Netherlands Switzerland	Armenia Bulgaria Czech Republic Hungary Moldova Poland Romania Russia Slovakia Ukraine	Albania Bosnia and Herzegovina Croatia Cyprus** Greece Italy Macedonia Malta Montenegro Portugal Serbia Slovenia Spain Turkey** Vatican City

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

Personal background of respondents

Communication qualifications

▪ Academic degree in communication (Bachelor, Master, Doctorate)	43.1%
▪ Professional certificate in public relations / communication management	25.9%
▪ Professional certificate in other communication discipline	14.8%

Highest academic educational qualification

▪ Doctorate (Ph.D., Dr.)	7.3%
▪ Master (M.A., M.Sc., Mag., M.B.A.), Diploma	57.6%
▪ Bachelor (B.A., B.Sc.)	27.6%
▪ No academic degree	7.5%

Membership in a professional organisation

▪ EACD	14.2%
▪ Other international communication association	12.1%
▪ National PR or communication association	52.5%

Male professionals are more likely to hold a Doctorate or no degree, while most female practitioners are qualified at the Master level

Academic degree \ Gender	Female	Male	Total
Doctorate (Ph.D., Dr.)	5.2%	10.0%	7.3%
Master, Diploma (M.A., M.Sc., Mag., M.B.A.)	60.4%	53.8%	57.6%
Bachelor (B.A., B.Sc.)	27.7%	27.5%	27.6%
No academic degree	6.6%	8.6%	7.5%

Organisational cultures: Different types within the sample

	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations	Agencies/ Consultancies
Integrated culture (participative – proactive)	52.7%	56.5%	44.1%	57.9%	77.8%
Interactive culture (participative – reactive)	5.9%	6.5%	6.1%	4.3%	6.8%
Entrepreneurial culture (non-participative – proactive)	21.7%	15.7%	26.8%	22.9%	7.8%
Systematised culture (non-participative – reactive)	19.7%	21.4%	22.9%	15.0%	7.6%



Ethical challenges and standards

Chapter overview

Like anyone else, communication professionals sometimes face situations where particular activities might be legally acceptable, but challenging from a moral point of view (Bowen, 2010). Six out of ten communication professionals in Europe report that they have encountered such situations in their daily work within the last twelve months. 35% of the respondents have actually experienced several ethical challenges. The survey shows that ethical issues are much more relevant than five years ago, driven by compliance and transparency rules (a statement supported by 77% of the respondents). Moreover, the increase in social media (72%) and the international character of communication today make communication more challenging from an ethical standpoint than before (57%).

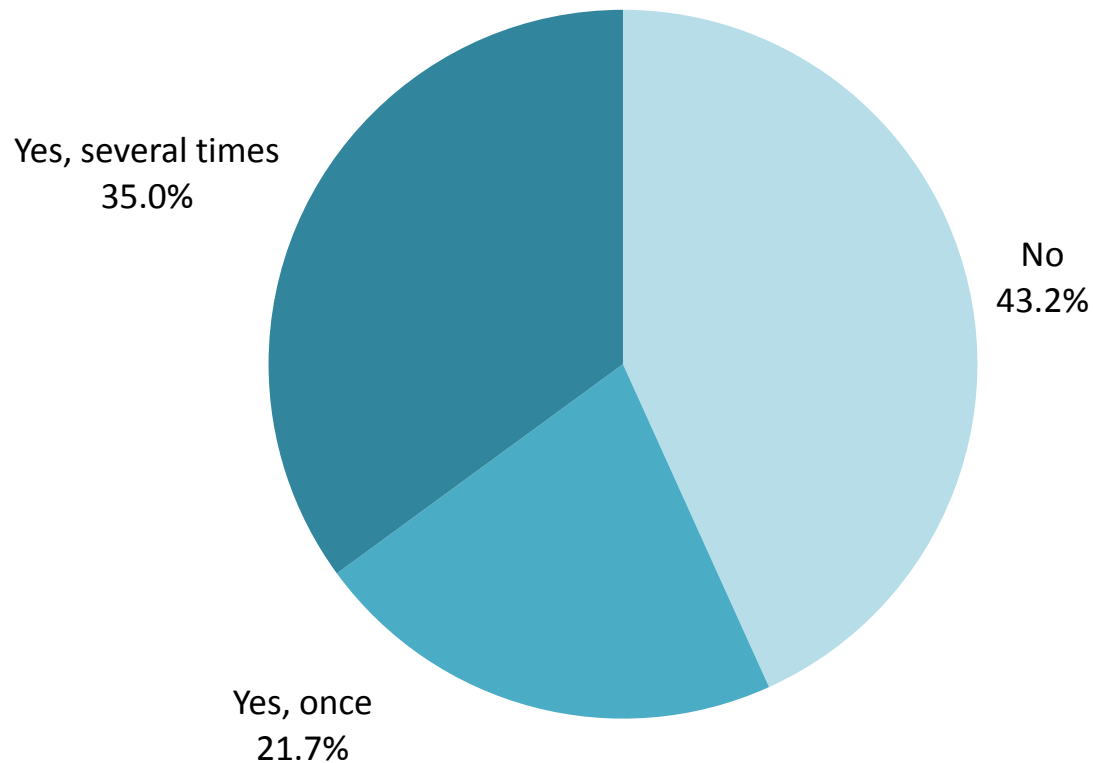
These figures show that there is a high appearance and awareness of ethical problems in the world of strategic communication. Professionals working in the areas of governmental relations, lobbying, public affairs and in the areas of online communication and social media encounter most ethical challenges. Two thirds of them faced such problems at least once last year. Less ethical questions were perceived in the fields of internal and international communication. The results show that ethical questions are more prevalent in Eastern Europe, compared to Western, Northern and Southern Europe. Also professionals working in consultancies and non-profit organisations are more confronted with the ethical side of public relations than professionals working in governmental organisations, private companies and joint stock companies.

Despite the variety of challenges and the intense debate on codes of ethics in the profession over many years, the majority of European communication practitioners has never used such a code, e. g. the code of Athens, to solve moral problems. Only a minority of 29% has ever applied a code in their daily work. Logically, professionals with more than ten years work experience have used codes of ethics significantly more often (31%) than younger colleagues with less than five years of experience (22%). Male communication professionals and members of professional communication organisations use ethical codes more often than female professionals or professionals who are not affiliated to associations. A country-by-country analysis reveals that the use of codes is surprisingly not used to a higher extent in countries with an elaborated system of regulations and institutions like Germany (Avenarius, 2007; Bentele & Avenarius, 2009).

An explanation for the poor utilisation of overarching professional norms might be found in the low acceptance of current codes. Almost 32% of the professionals think that typical ethical codes provided by the PR profession today are outdated. Nevertheless, an overwhelming majority of 93% finds that the communication profession really needs such rules. Most respondents take the view that national (30%) or international professional associations (28%) are most suited to develop modern codes of conduct. Professionals working in companies favour international associations, while all others prefer national associations as eligible providers of ethical codes. Even non members of professional associations think that such associations are the most suitable providers. This point of view is shared across the continent. It can be interpreted as a call for action to provide up-to date guidelines made to fit the digital age across Europe.

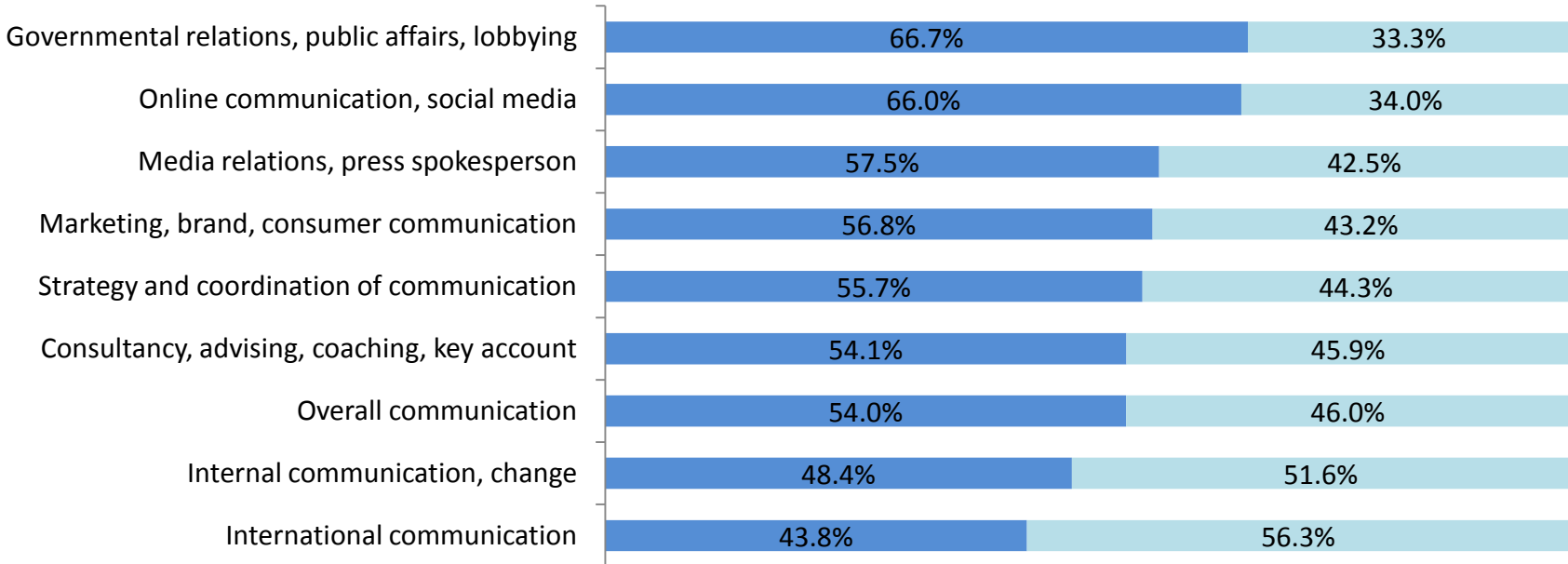
Six out of ten communication professionals in Europe report about ethical challenges in their daily work

Ethical challenges experienced within the last twelve months?



Ethical challenges in different fields of practice: Public affairs and online communication are the most contested

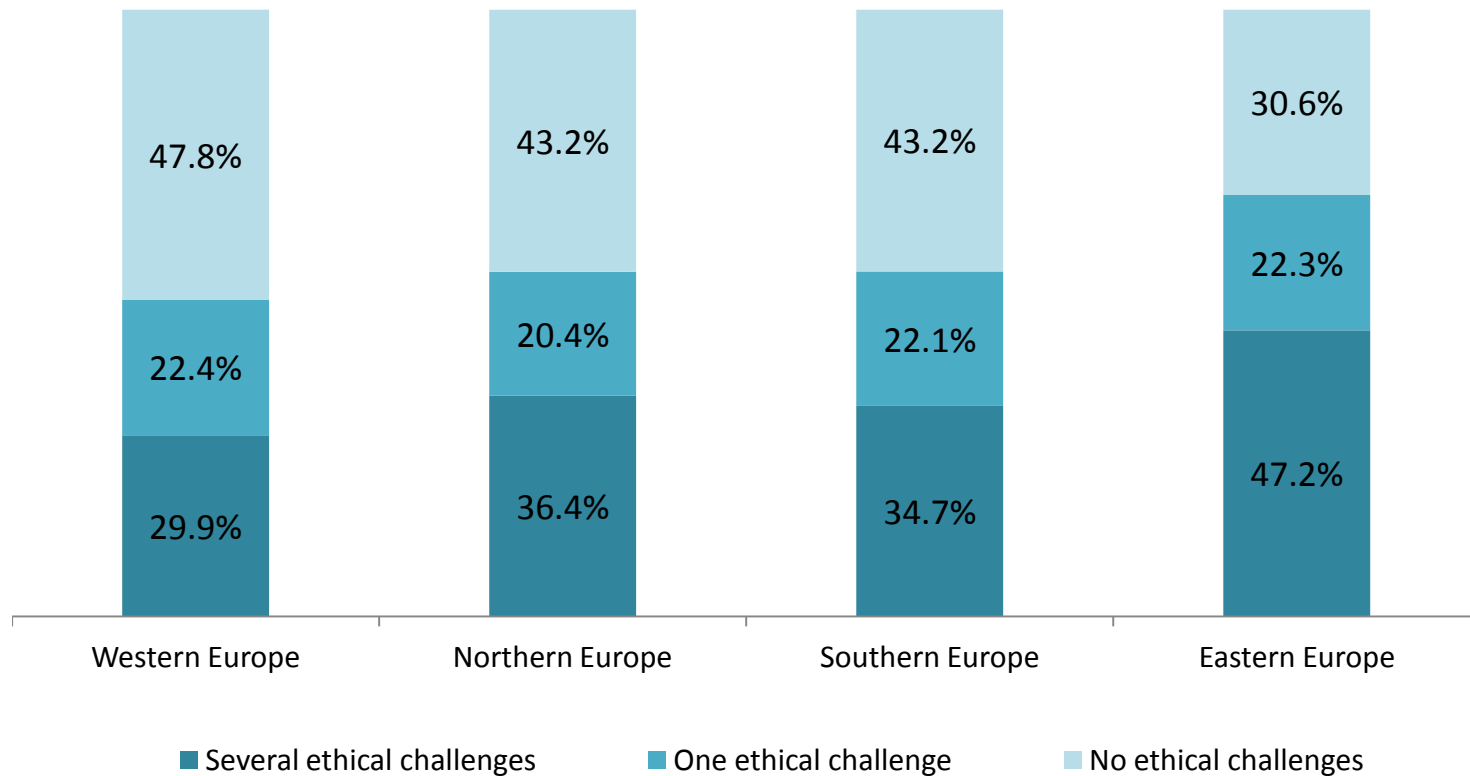
Communication professionals working in ...



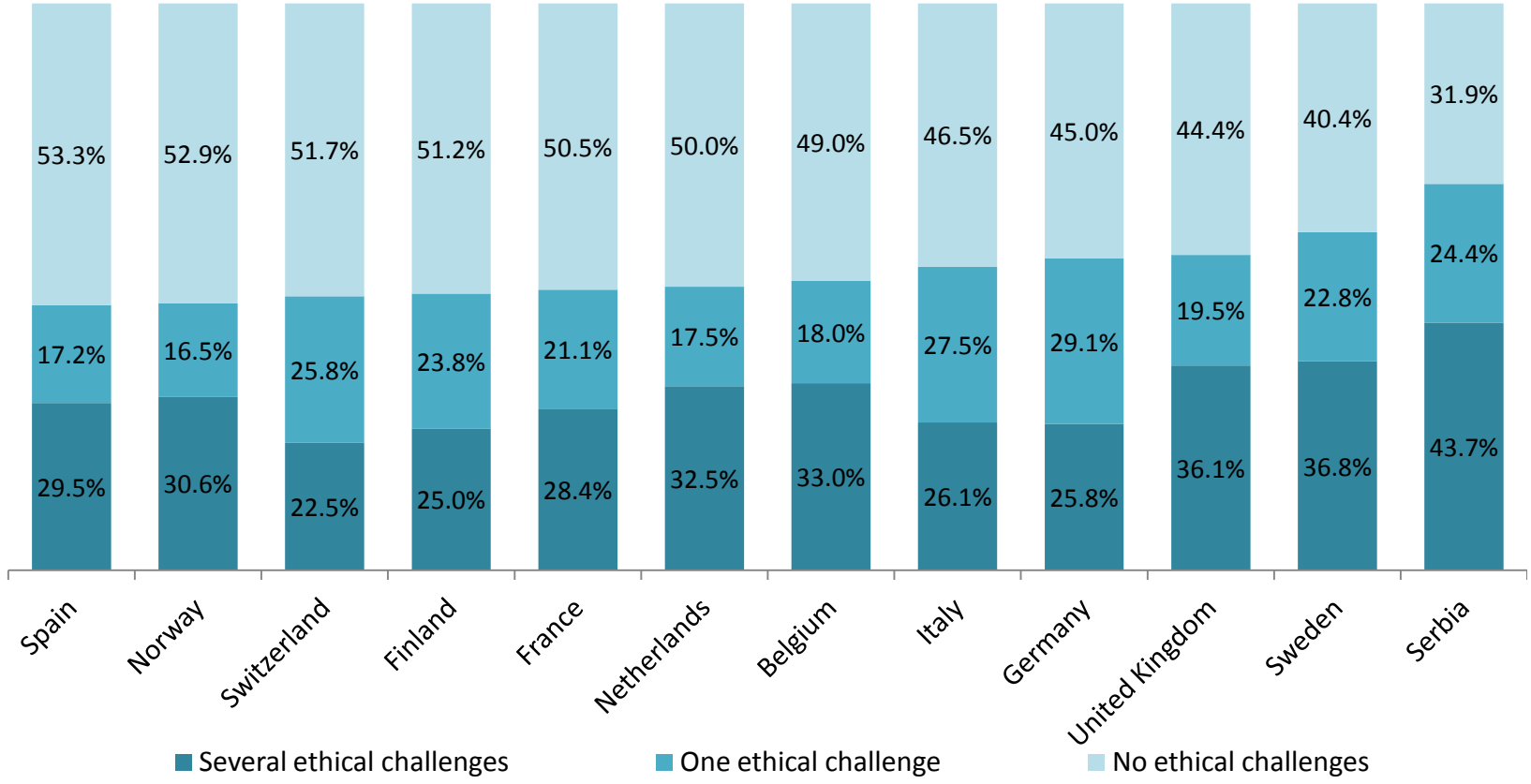
■ Ethical challenges (once or several times) ■ No ethical challenges experienced within the last 12 months

www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,137 PR professionals. Q 1: In your daily work, did you experience ethical challenges within the last twelve months? Q 39: What are the dominant areas of your work (up to two selections per respondent).

Regional differences: Ethical challenges are more prevalent in Eastern Europe

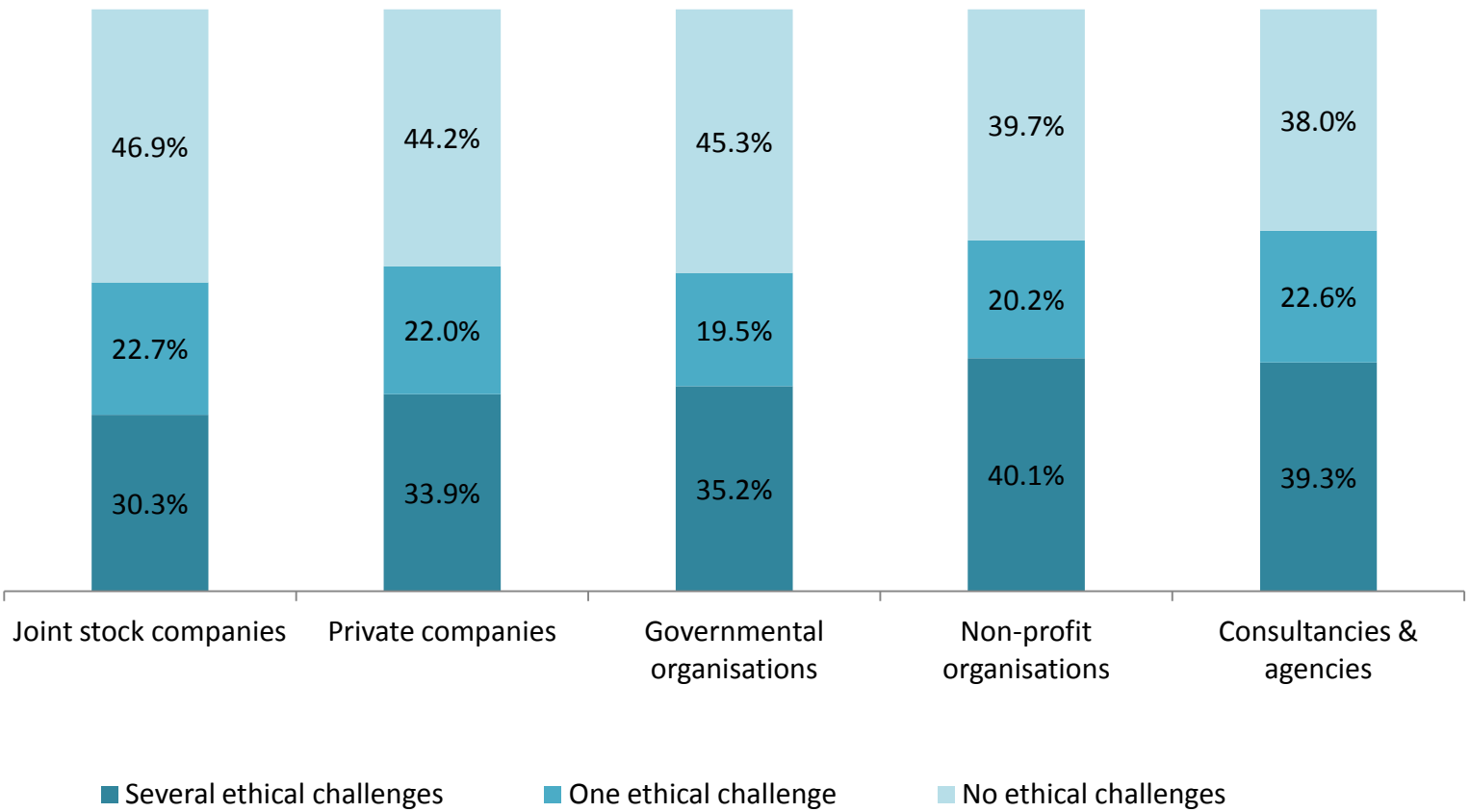


Country-by-country comparison: Spain, Norway, Switzerland, Finland and France report less ethical problems than other countries



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,137 PR professionals. Q 1: In your daily work, did you experience ethical challenges within the last twelve months?

Organisational breakdown: Communication professionals working in agencies and consultancies are most likely to experience ethical dilemmas



www.communicationmonitor.eu / Zeffass et al. 2012 / n = 2,137 PR professionals. Q 1: In your daily work, did you experience ethical challenges within the last twelve months? Significant differences between types of organisations (chi-square test / Cramer's V, $p \leq 0.05$, $V = 0.062$).

Ethical issues are much more relevant than in former times, driven by internationalisation strategies, compliance rules and social media practices

Communication professionals in Europe:

57.6%

state that they face more ethical challenges than five years ago

77.3%

Compliance and transparency rules force professionals to be more cautious today

72.3%

Social media communication brings about ethical challenges that differ from other channels

57.4%

Communicating internationally is more challenging from an ethical standpoint

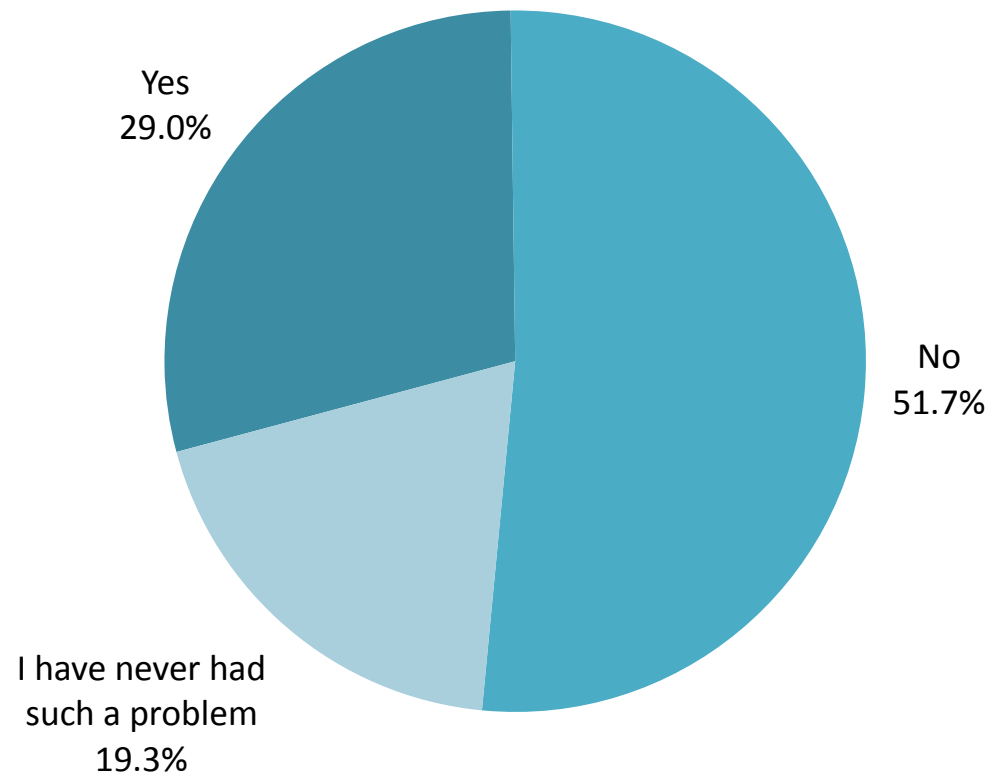
www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,185 PR professionals from 42 countries. Q 2: What do you think of these statements? Compliance and transparency rules force professionals to be more cautious today. Social media communication brings about ethical challenges that differ from other channels. Communicating internationally is less challenging from an ethical standpoint than communicating in my own country (reverse coded). Nowadays, communication professionals face less ethical challenges than five years ago (reverse coded). Scale 1 (strongly disagree) – 5 (totally agree). Considered scale points 4-5 (normal) or 1-2 (reverse).

Perception of ethical issues in different regions

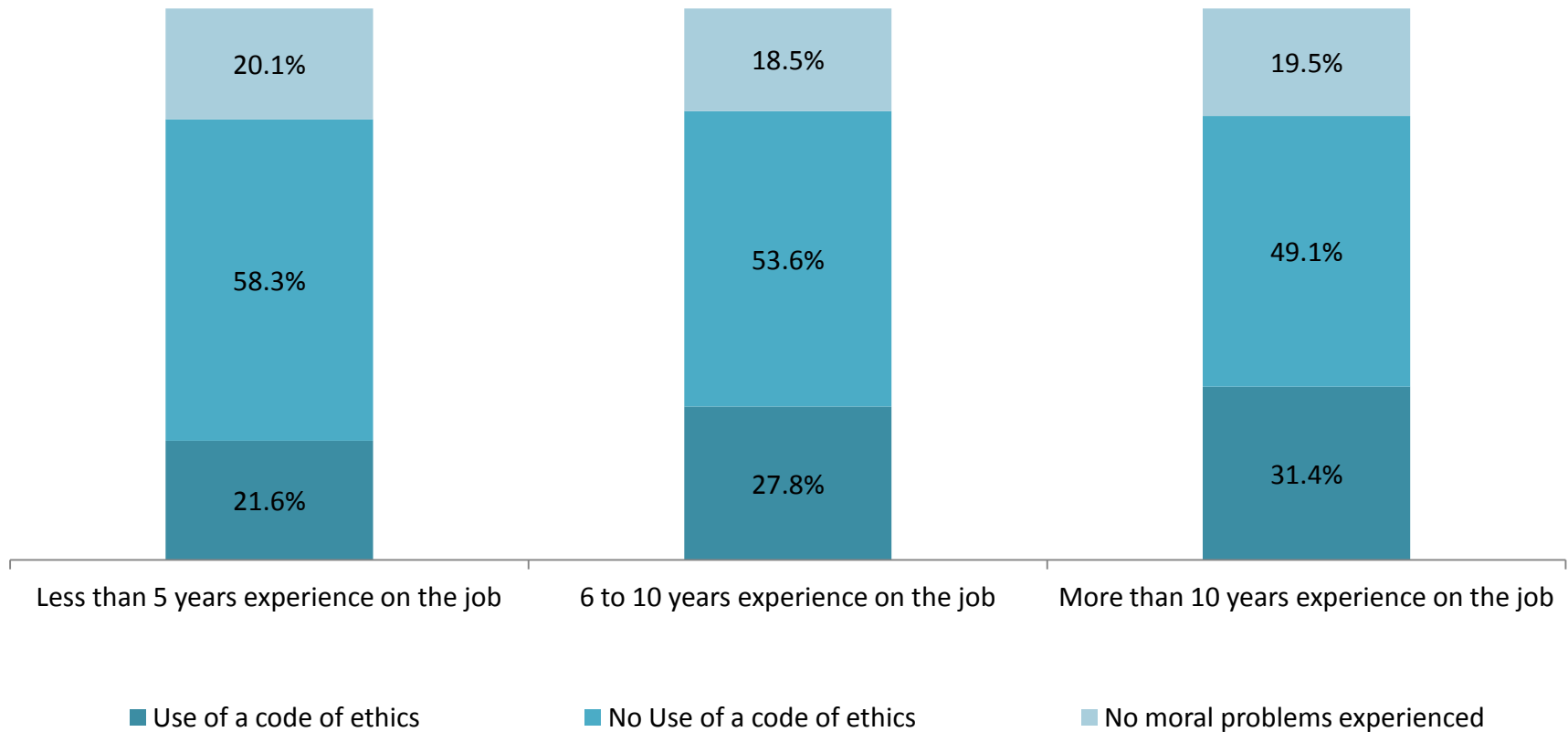
	Western Europe	Northern Europe	Southern Europe	Eastern Europe
Communication professionals face more ethical challenges than five years ago	62.3%	57.4%	52.7%	58.1%
Compliance and transparency rules force professionals to be more cautious	81.4%	75.9%	75.6%	74.8%
Social media communication brings about ethical challenges that differ from other channels **	72.5%	75.7%	69.5%	68.8%
Communicating internationally is more challenging from an ethical standpoint	65.9%	61.6%	47.7%	47.9%

Professional codes of ethics: Only a minority of European communication practitioners uses them to solve moral problems

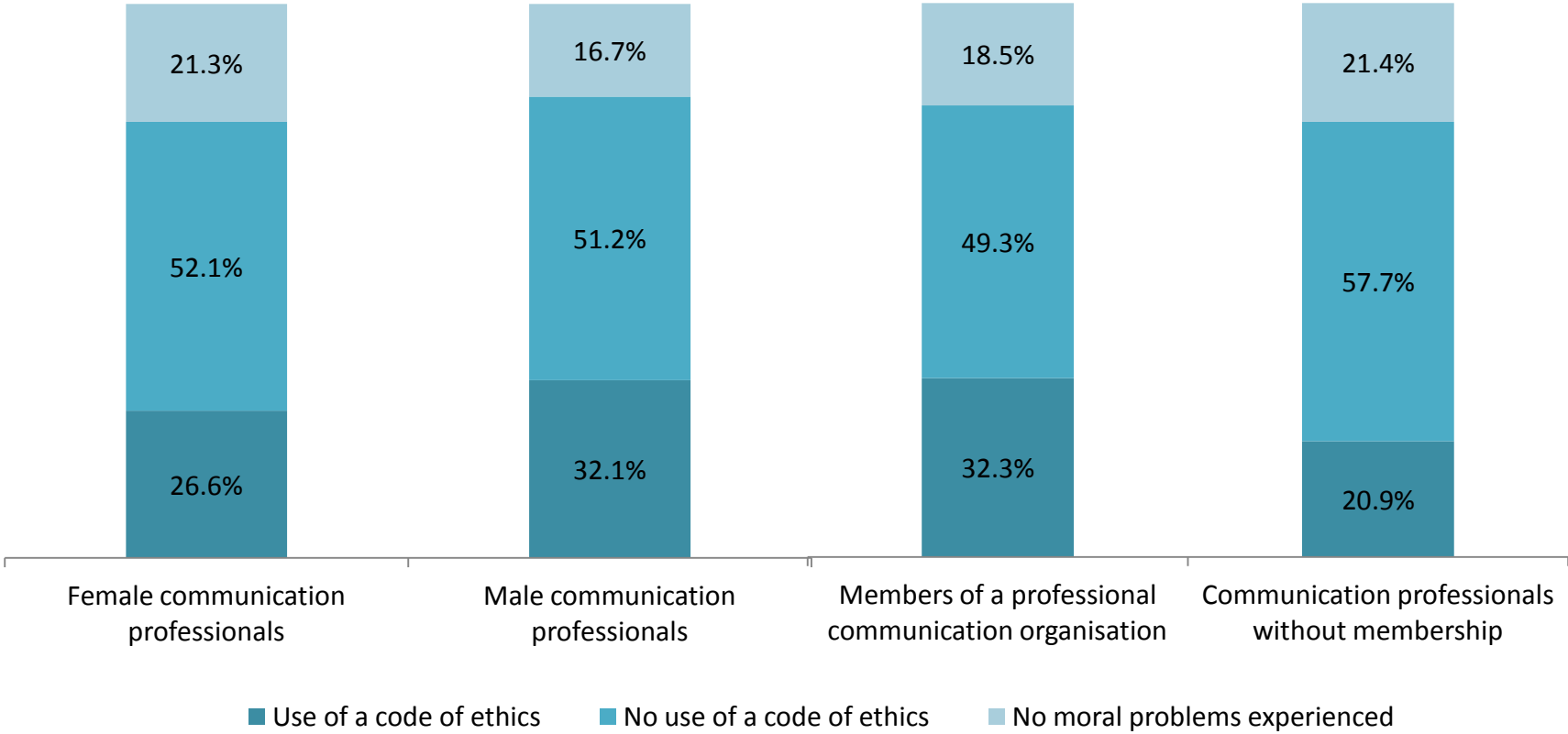
Usage of a professional code of ethics to solve moral problems



Professionals with more experience on the job are more likely to have used codes of ethics than younger colleagues

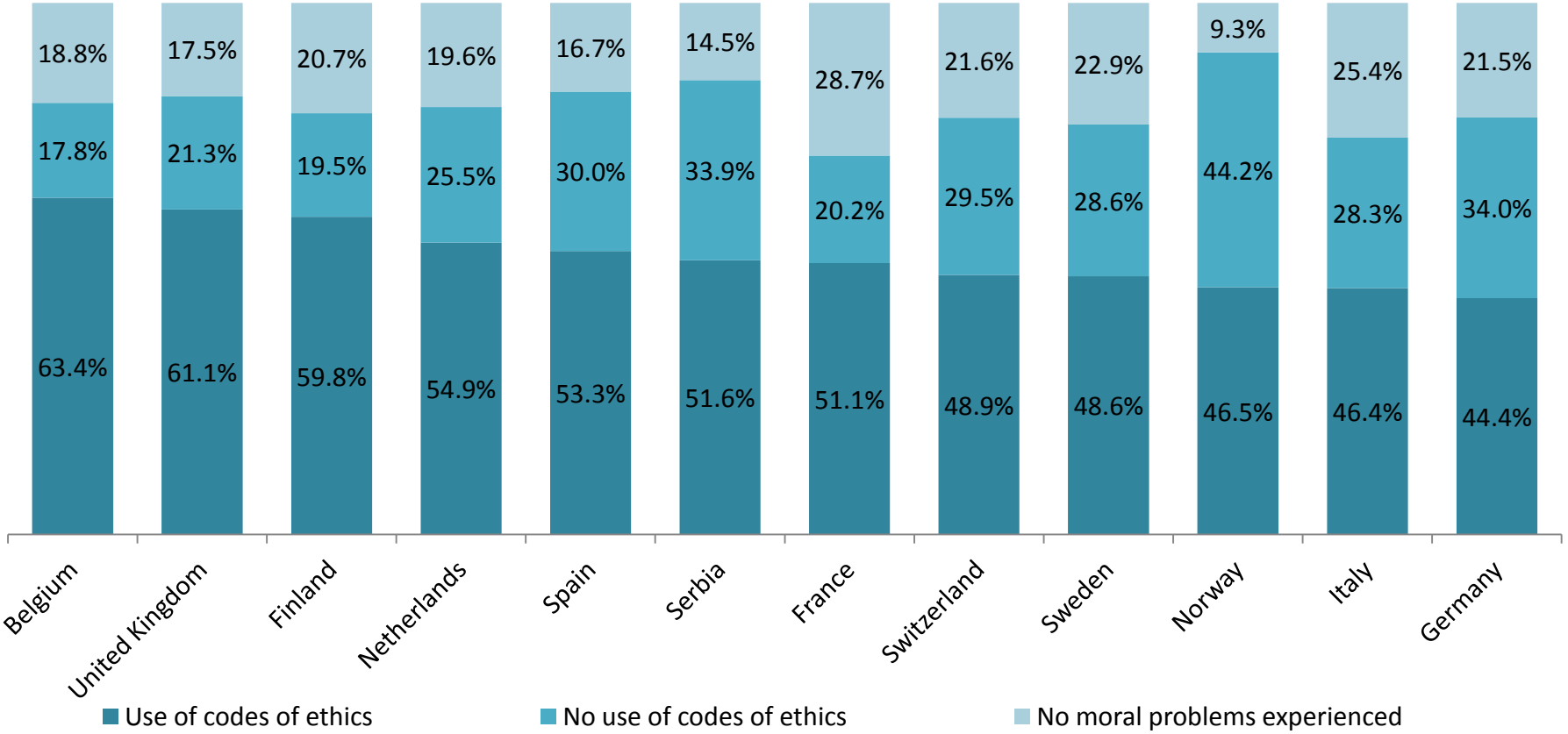


Use of ethical codes in communication management correlates with gender and membership in professional organisations



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,096 PR professionals. Q 3: Did you ever use a professional code of ethics (i.e. the Code of Athens) to solve a moral problem in your daily work? Differences are highly significant (chi-square test / Cramer's V, $p \leq 0.01$, $V = 0.072$ gender, $V = 0.114$ membership).

Country-by-country analysis: Codes of ethics are applied most often in Belgium and the UK; Germany, Italy and Norway report the lowest rate of usage



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,096 PR professionals. Q 3: Did you ever use a professional code of ethics (i.e. the Code of Athens) to solve a moral problem in your daily work? Differences are highly significant (chi-square test / Cramer's V, p ≤ 0.01, V = 0.129).

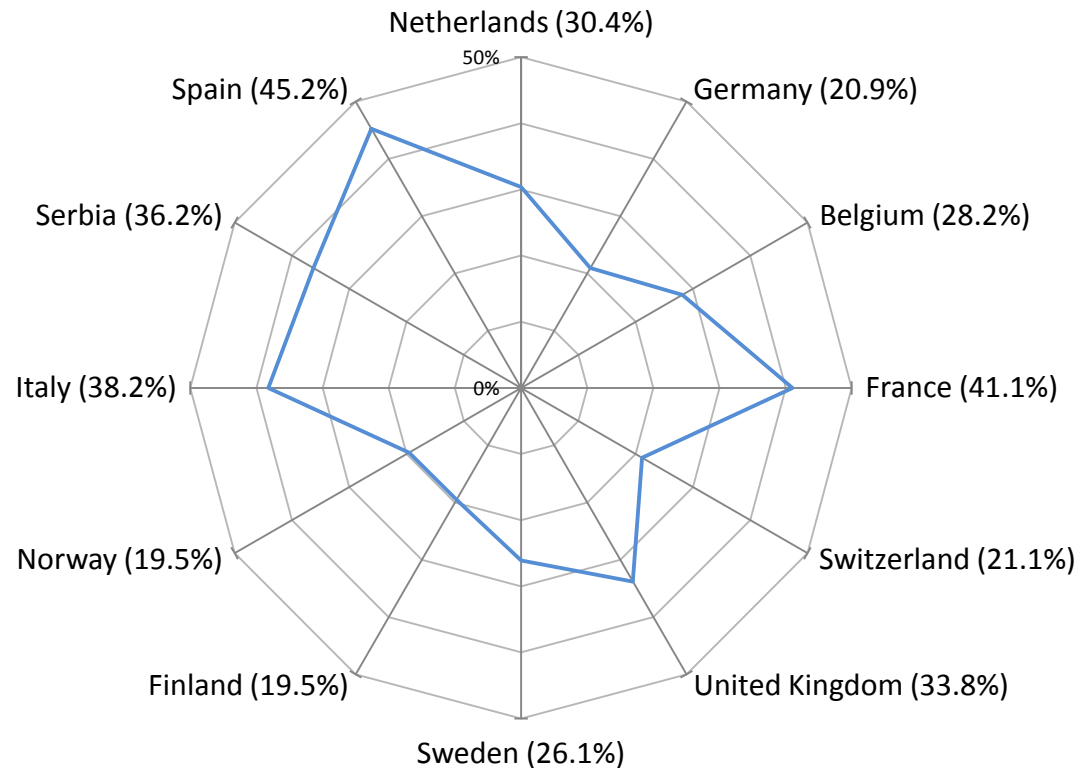
Today's codes of ethics are criticised by one third of the respondents

Communication professionals in Europe

31.7%

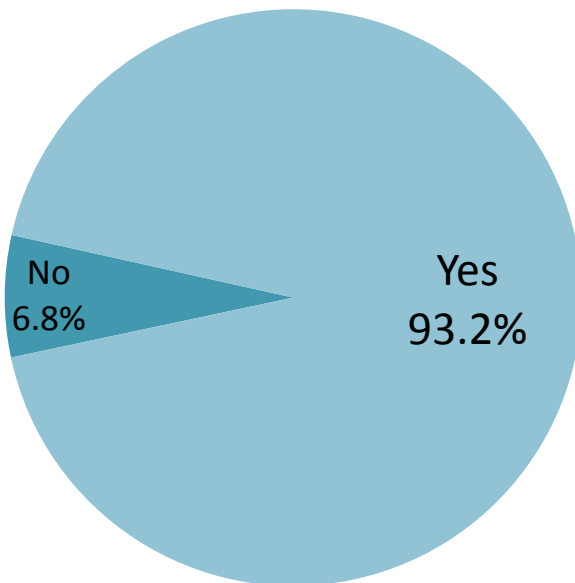
state that typical codes of ethics provided by the PR profession are outdated today

Country-by-country analysis



Despite low utilisation and critical voices, communication professionals clearly see the need for a code of ethics

Does the communication profession need a code of ethics?



Which institutions are most eligible to provide such a code?

National professional associations	29.6%
International professional associations	28.4%
Organisations individually	19.8%
Governmental institutions	10.2%
Universities and educational institutions	5.2%

Eligible providers of ethical codes: Professionals working in companies favour international associations, while all others prefer national associations

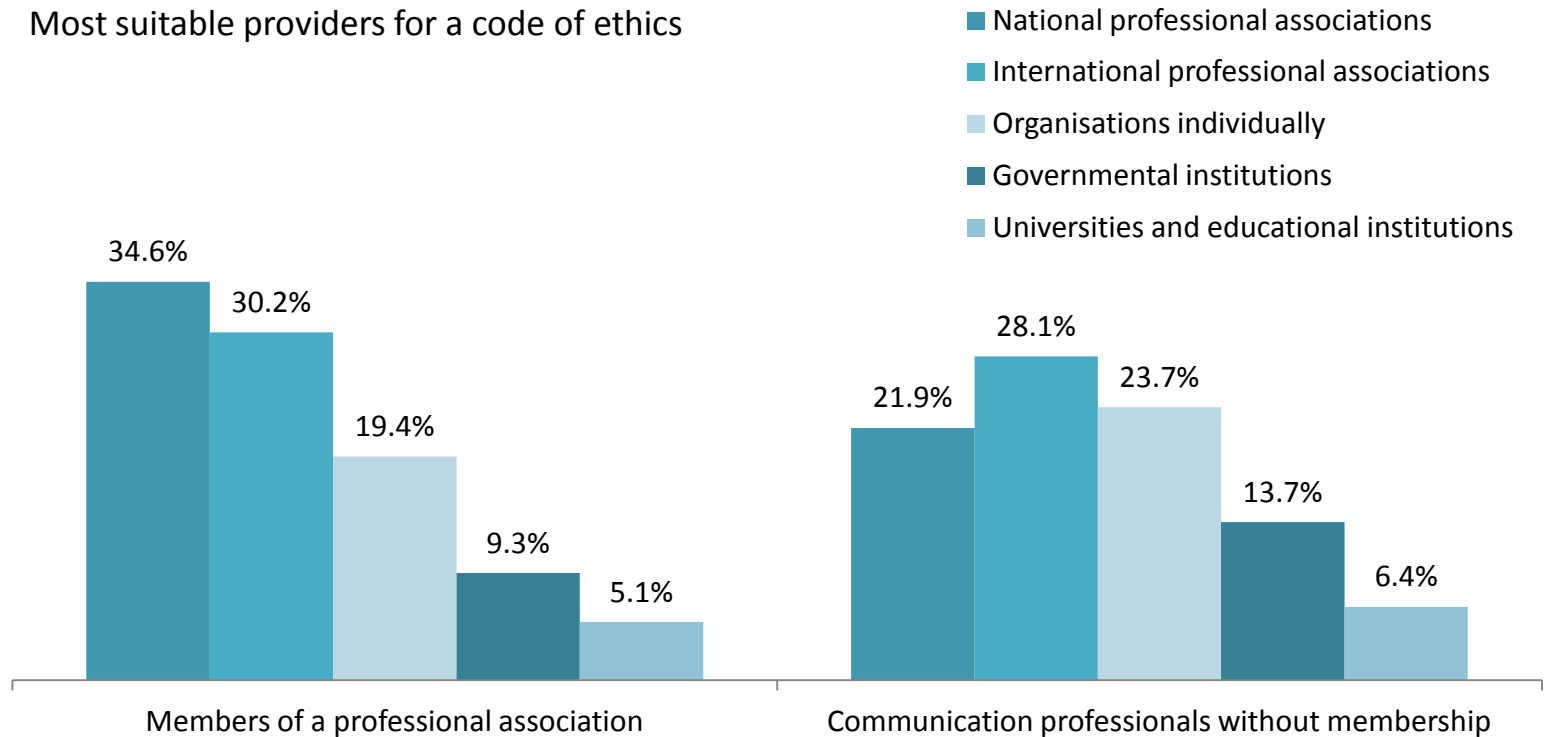
Most suitable provider for a code of ethics



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,185 PR professionals. Q 4: Do you think that the communication profession needs a code of ethics, and if needed, which institutions are most eligible to provide such a code? Differences are highly significant (chi-square test / Cramer's V, p ≤ 0.01, V = 0.113)

Professional associations are preferred providers of ethical codes, even for non-members

Most suitable providers for a code of ethics



National and international associations are valued differently in various countries

Most suitable providers for a code of ethics:	National professional organisations	International professional organisation	Organisations individually	Governmental institutions	Universities and educational institutions
Belgium	11.7%	47.6%	18.4%	11.7%	4.9%
Finland	20.7%	37.9%	23.0%	8.0%	5.9%
France	29.5%	43.2%	14.7%	8.4%	2.1%
Germany	22.9%	30.1%	24.2%	9.2%	5.9%
Italy	20.2%	36.1%	18.0%	18.8%	1.4%
Netherlands	15.8%	30.4%	27.2%	3.8%	5.7%
Norway	39.1%	16.1%	20.7%	12.6%	8.0%
Serbia	36.2%	26.1%	13.0%	16.7%	6.5%
Spain	26.2%	28.6%	17.5%	10.3%	7.9%
Sweden	37.4%	26.1%	16.5%	11.3%	1.7%
Switzerland	17.8%	33.3%	33.3%	1.1%	11.1%
United Kingdom	44.1%	16.0%	18.8%	7.5%	2.3%



Professionalisation and accreditation

Chapter overview

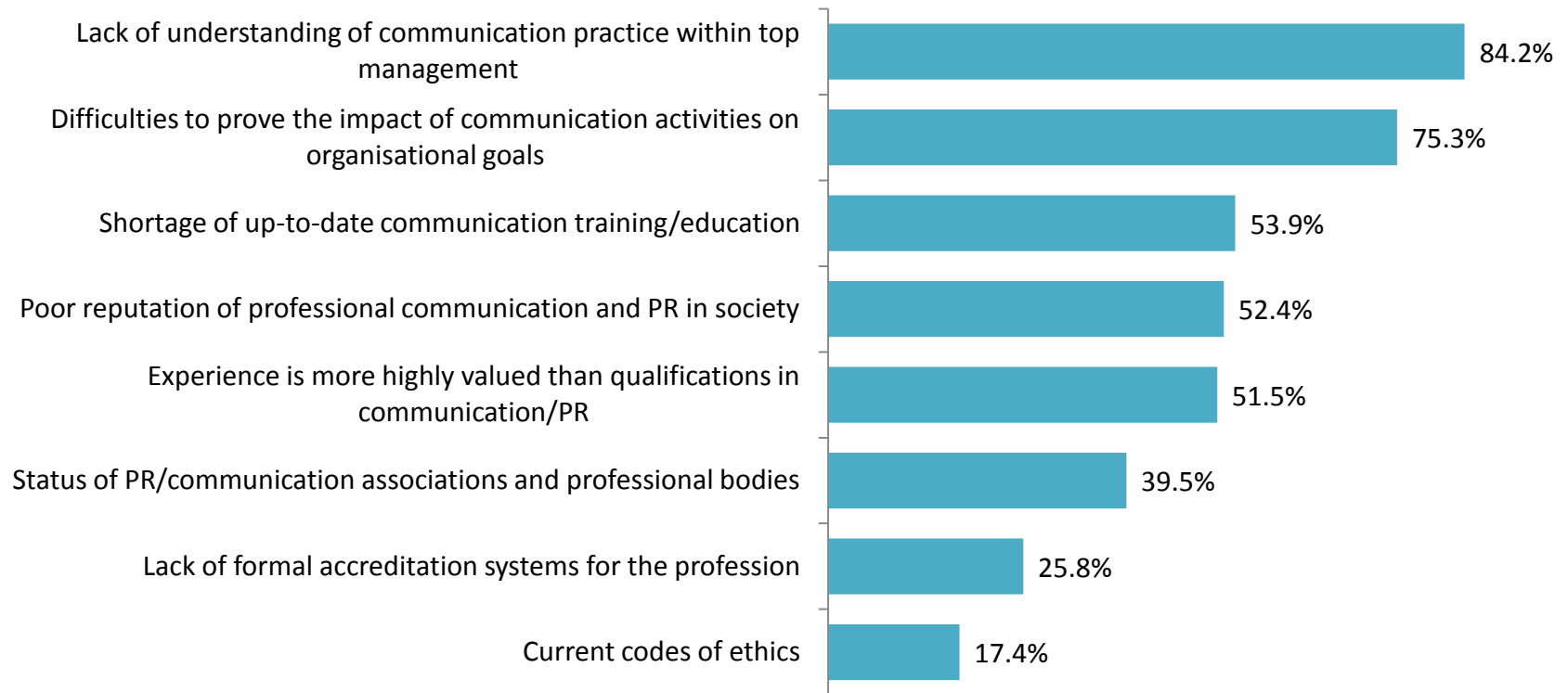
One of the ongoing issues in communication management is the further professionalisation of the practice. Research has identified manifold drivers which foster or hinder achievements in the field. The most important barriers in Europe were identified in this survey. A large majority of the respondents state that a lack of understanding of communication practice within the top management (84%) and difficulties of the profession itself to prove the impact of communication activities on organisational goals (75%) are the main barriers for further professionalisation of the practice. So the key challenges for European communication professionals are to explain the communication function to top management and to prove the value of communication for organisations. Other barriers are, in decreasing order, a shortage of up-to-date communication training (54%), a poor reputation of professional communication and public relations in society (52%), the phenomenon that experience is valued more highly than formal qualifications in communication or public relations (52%), the status of PR and communication associations and professional bodies (40%).

Although a lack of formal accreditation systems for the profession is only seen as a large barrier by every fourth respondent, most practitioners do see advantages of such systems, which are already in place in the United Kingdom, Brazil and other countries. They think however that the impact of these systems will be mainly on the reputation of the field and much less on quality. 70% of the respondents think that national or international accreditation can help to improve the recognition and the reputation of the field. But only 58% agree that a global accreditation system will help to standardise the practice of public relations and 54% believe that accreditation ensures that practitioners will have proper knowledge of recent communication tools and trends. Furthermore, more than six out of ten of respondents are convinced that, regardless of any accreditation system, organisations will always find ways to hire the best people for communication jobs. This questions the real value of such systems.

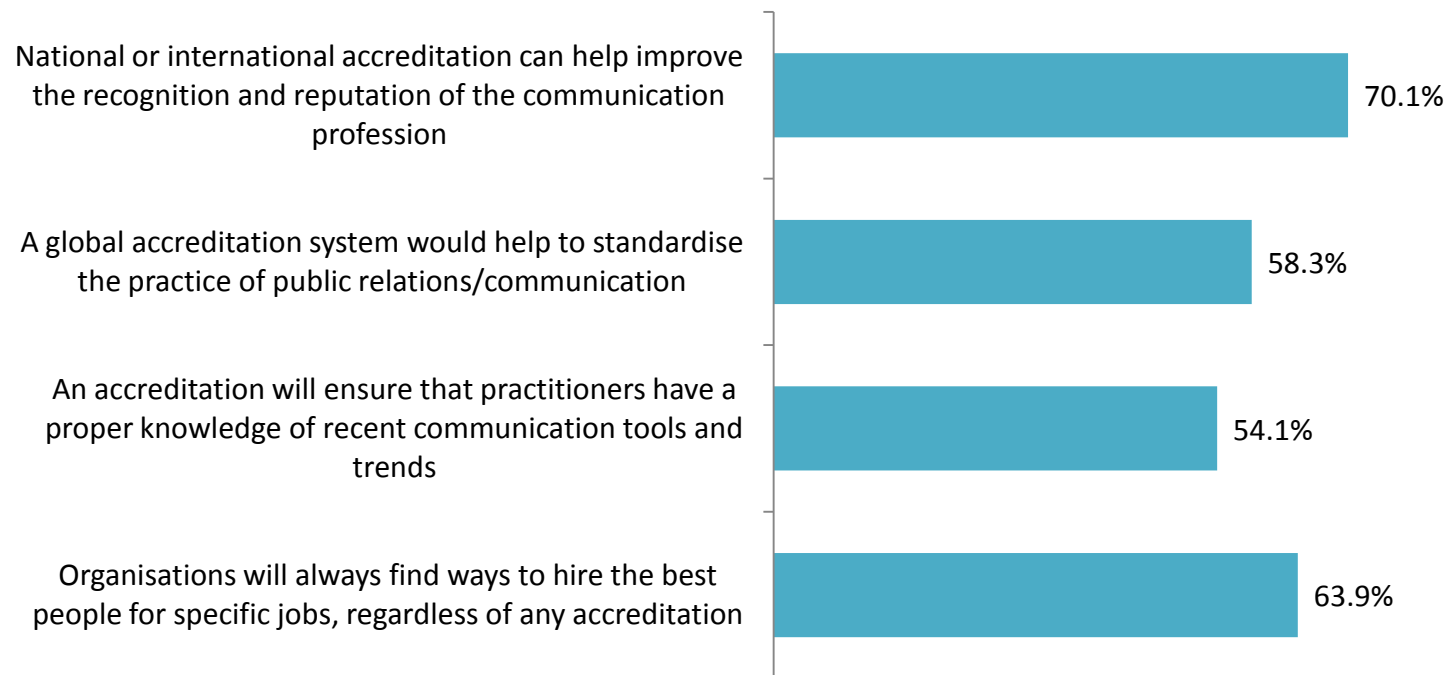
The results of the monitor also show that there are significant regional differences in the way professionals think about accreditation systems. Practitioners in Eastern and Southern Europe have a stronger belief in accreditation systems than their colleagues in Northern and Western Europe. Furthermore communication practitioners working in non-profit organisations believe to a lesser extent in the standardisation power of accreditation, compared to practitioners in private or joint stock companies. The opinions differ especially on the belief in global standardisation of the practice. Also, non-profits are more sceptical about the positive reputation and recognition gained by formal qualification systems.

Professionalisation of communication: Explaining the function to top management and proving value for organisations are key challenges

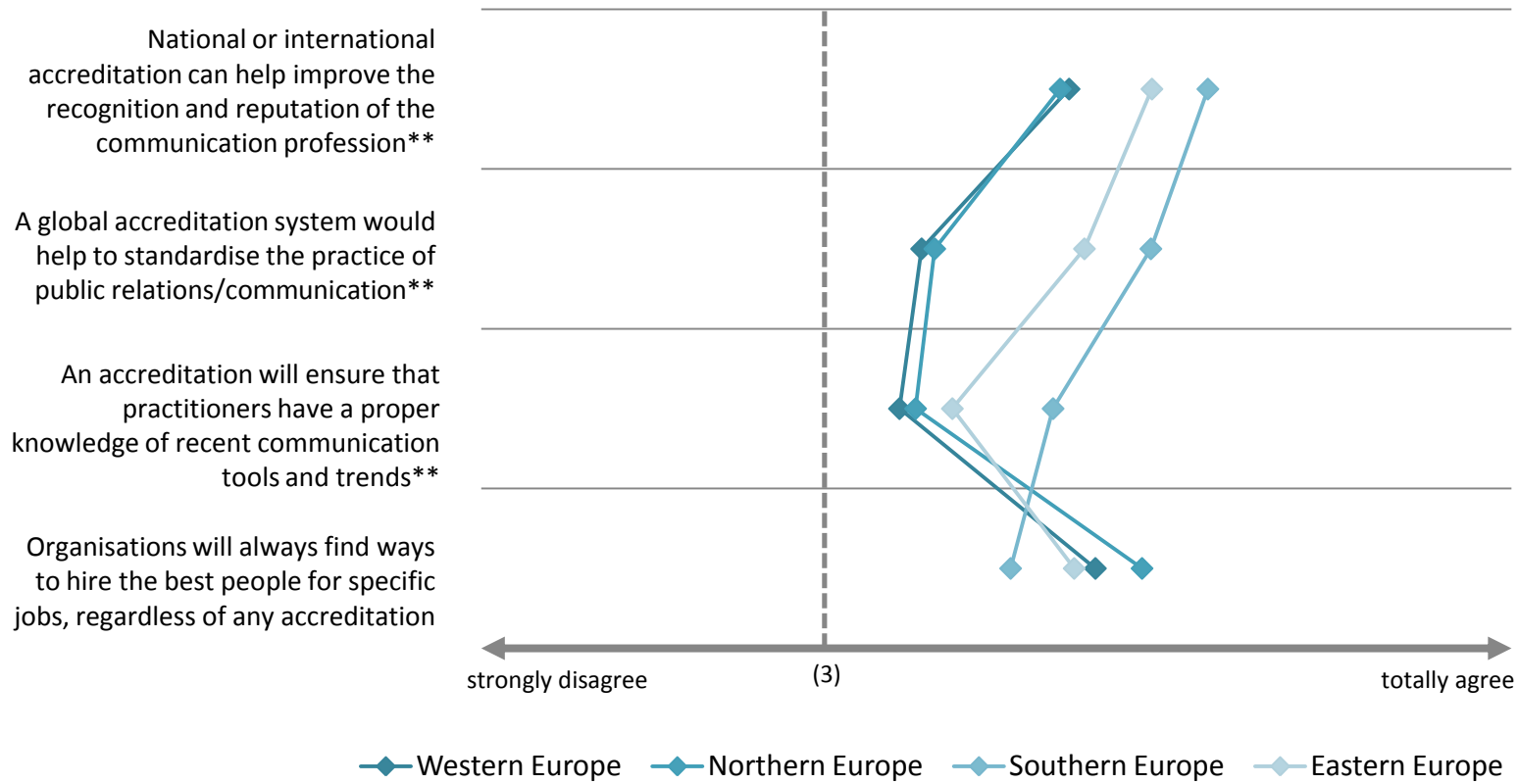
Barriers affecting professionalisation of communication management



Most practitioners see advantages of professional accreditation systems;
but the impact will be mainly reputational and less on quality

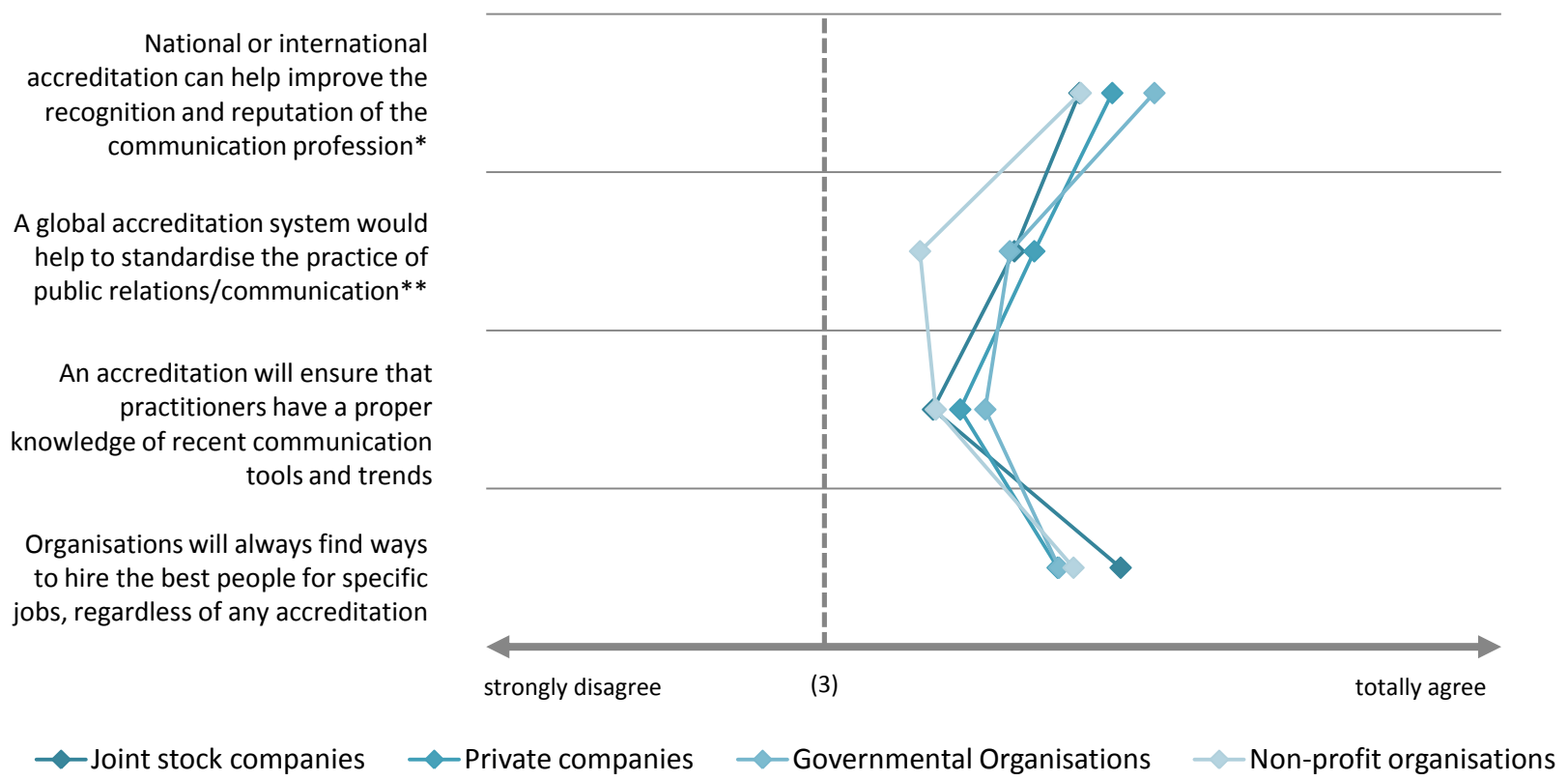


Regional differences: Practitioners in Eastern and Southern Europe have a stronger belief in accreditation systems



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,185 PR professionals. Q 5: What do you think about accreditation systems of the profession? Scale 1-5. Mean values. ** Highly significant differences (chi-square test, p ≤ 0.01).

Communication practitioners working in non-profit organisations are less confident in the standardisation power of accreditation





Practice of strategic communication

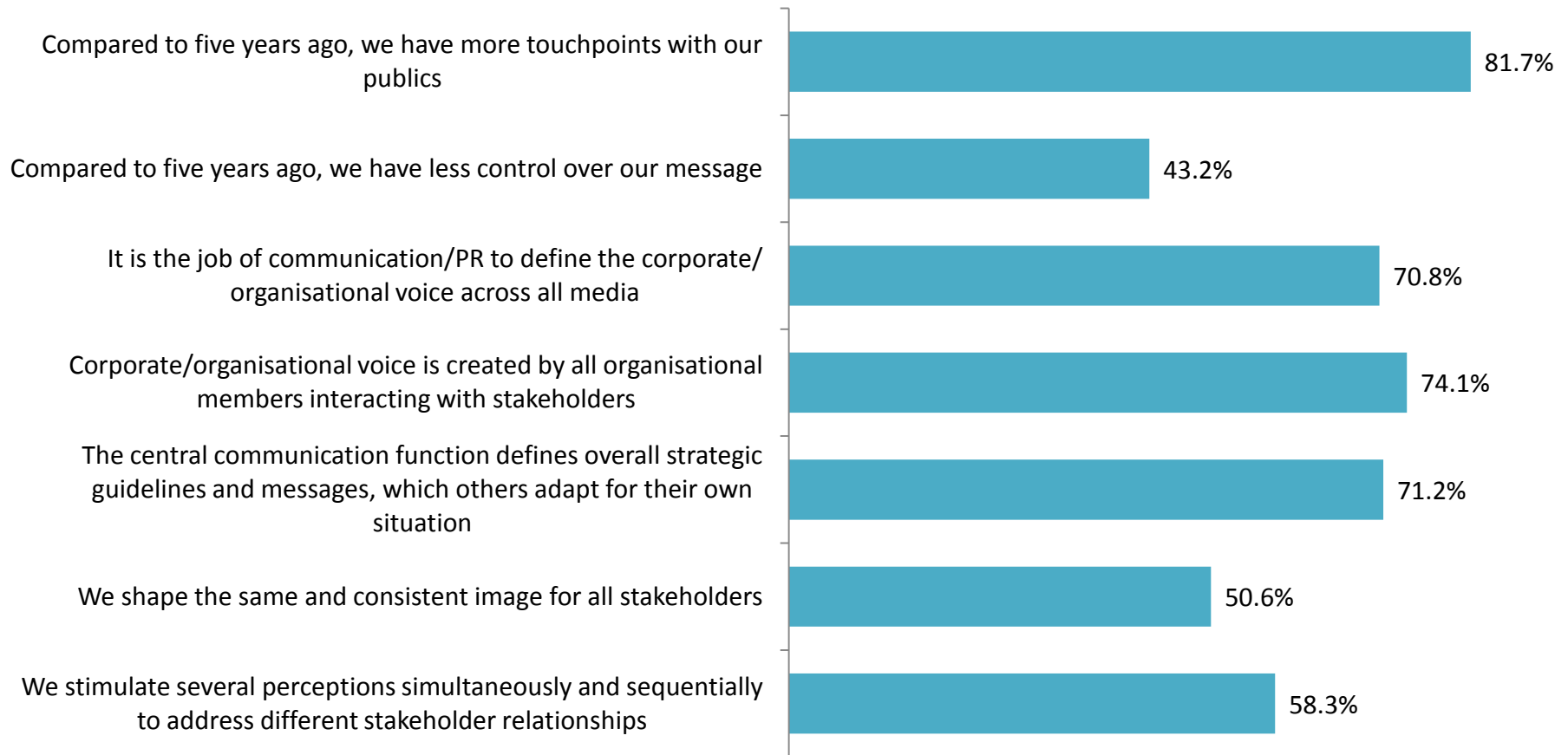
Chapter overview

For decades now, communication management and public relations is transforming itself from an operational practice of preparing, producing and disseminating communication materials into a full strategic management function, which includes speaking as well as listening, consulting as well as executing. Van Ruler and Verčič (2005) proposed that today's top communicators not only manage communication on their own, but more and more often take over responsibilities for education and training of the top management and other colleagues in communication. Moreover, they take responsibilities for the alignment of an organisation's mission and the expectations of stakeholders. This practice has been named reflective communication management.

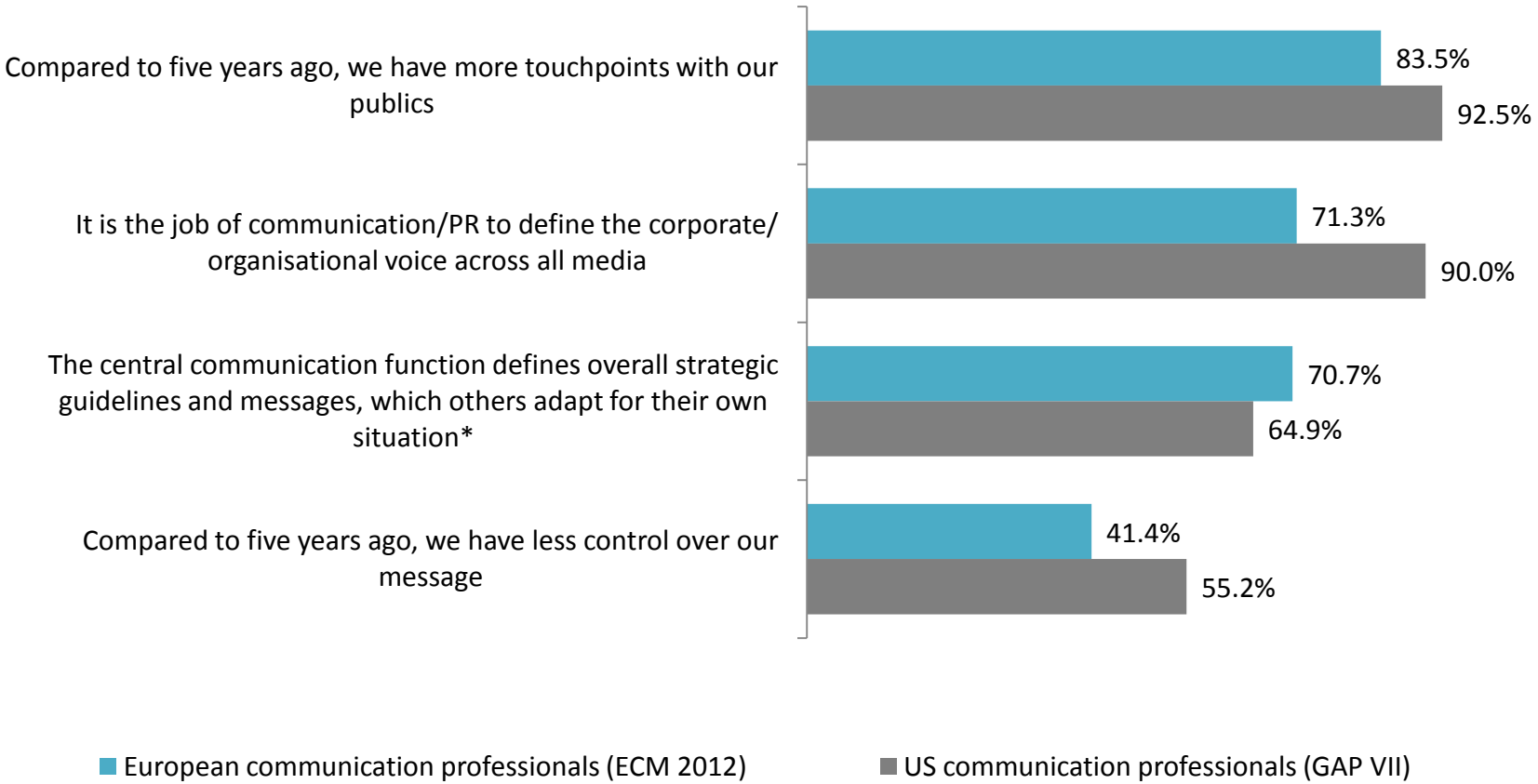
Empirical data from this survey show that this concept can be found in the real world of strategic communication, although most practitioners still stick to traditional role models. However, those are clearly reaching their limits because the complexity of communication is increasing. Organisations are interacting with more stakeholders through more media in more directions. 82% of the respondents say that their organisation, compared to five years ago, has more touchpoints with its publics. According to comparative data, the situation is even more extreme in the United States: the figure there is almost 93%. Three out of four European communication professionals agree that the corporate/organisational voice is created by all organisational members interacting with stakeholders. So it is not surprising that the idea of shaping a consistent image for all stakeholders is supported by fewer respondents than the alternative concept of polyphony (Cornelissen et al., 2008), meaning that several perceptions are stimulated simultaneously and sequentially in different stakeholder relationships.

These changes in the environment are requiring communication professionals to reconceptualise and reorganise what they do. Although the majority of productive time still goes to operational communication (talking to colleagues and media, writing texts, monitoring, organising events, etc) this does not account for more than 37% of a typical week. Managing activities related to planning, organising, leading staff, evaluating strategies, justifying spending and preparing for crises takes 29% of the time. Reflective communication management, aligning communication, the organisation/client and its stakeholders take 19% and coaching, training and educating members of the organisation or a client takes almost 15%. As expected, there are significant correlations with the position of a communicator in the organisational hierarchy, with the influence of the communication function (having more influence on top management correlates with more reflection and less operations) and with sectors – all businesses (private companies, joint stock companies and consultancies) allow for more reflexive management than non-profit and governmental organisations. Media relations professionals perform the largest portion of operational work, while practitioners engaged in governmental relations, public affairs and lobbying spend more time for reflective activities. This may also be a possible explanation for Belgium being on the top of a league of countries with the highest amount of time spent on reflection in the communication function.

Integrating communications: Organisations have more touchpoints than ever; many pursue strategic leadership while supporting multiple voices and images



Experiences and functional goals of communication professionals in Europe and the United States differ in various ways

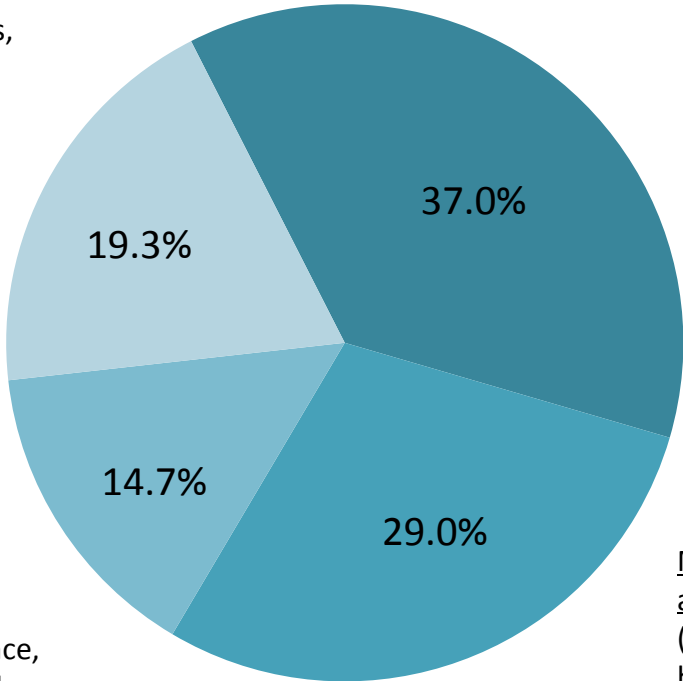


www.communicationmonitor.eu / Zerfass et al. 2012 / n = 1,712 European PR professionals working in communication departments, Q 8. Swerling et al. 2012 / n^{max} = 572 US PR professionals working in communication departments. * Slightly different wording in GAP VII: The central communication organization sets the overall strategic communications direction, which the organization/profit centers then adapt for their own situations.

How European communication professionals spend their productive time at work

Aligning communication, the organisation/client and its stakeholders

(studying business and social research reports, identifying organisational goals, monitoring public issues and stakeholder expectations, debating visions and business strategies with top management and other departments, developing scenarios, building legitimacy)



Operational communication

(talking to colleagues and journalists, writing press releases and print/online texts, producing communication media, monitoring results of our activities, organising events etc.)

Coaching, training and educating members of the organisation or clients

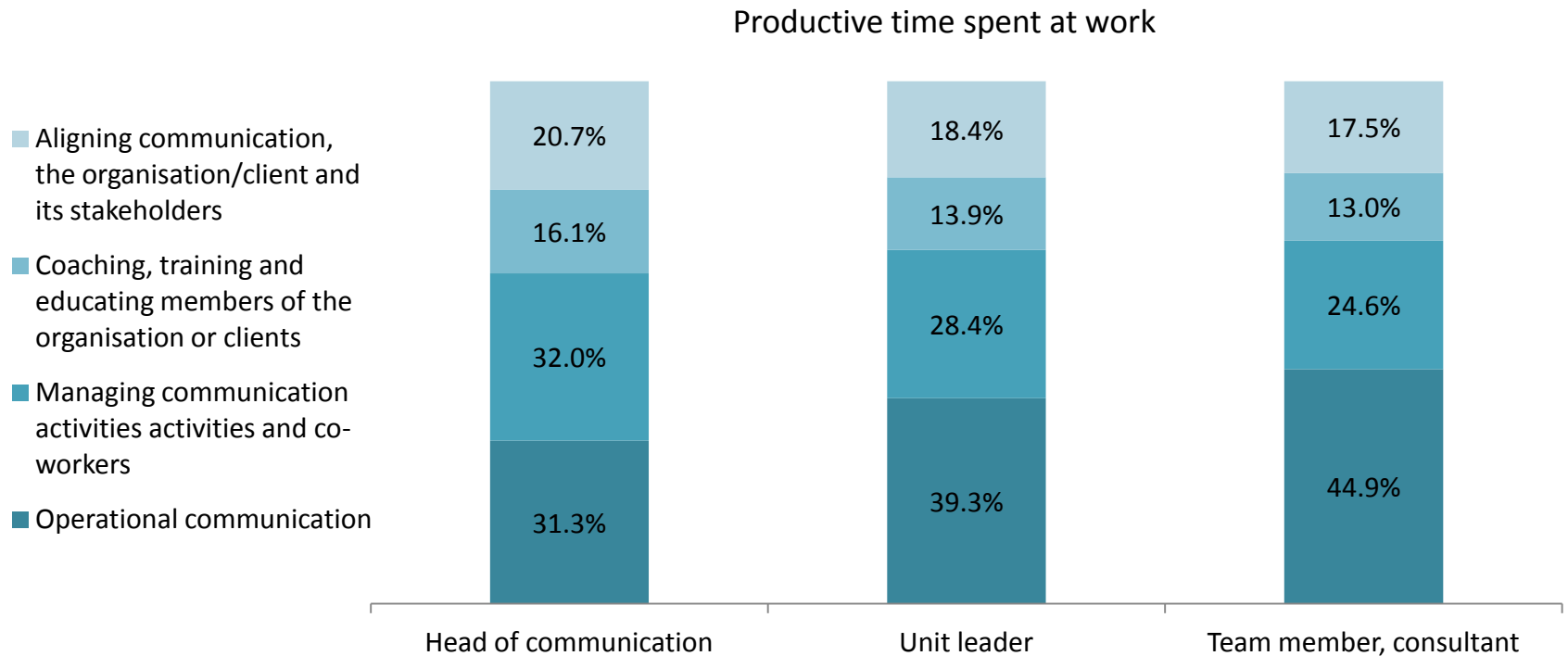
(on the vision, mission and other communication related issues as well as upgrading their communicative competence, preparing them for communicating with the media, stakeholders etc.)

Managing communication activities and co-workers

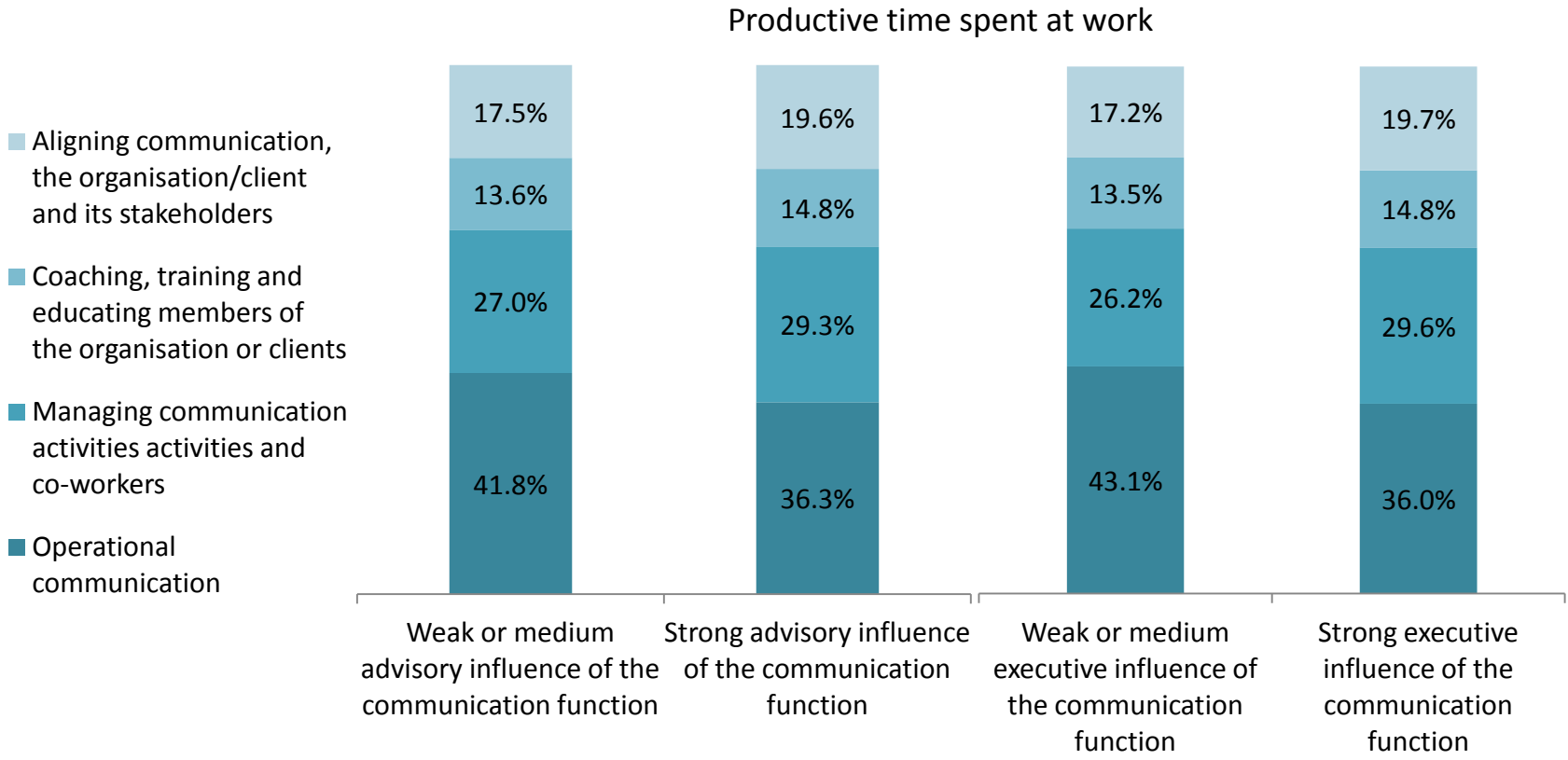
(planning, organising, leading staff, budgeting, evaluating processes and strategies, justifying communication spending, preparing for crises)

www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,185 PR professionals. Q 7: Please think about how you spend most of your time at work. Please divide your productive time spent at work (values should add up to 100%). In a typical week, I spend the following amount of time with ... Scale 0%, 10%, ..., 100%. Figure displays median for each item; values have been rounded based on mean values.

Heads of communication focus to a greater extent on strategic and reflective activities, but operational communication still takes one third of their time

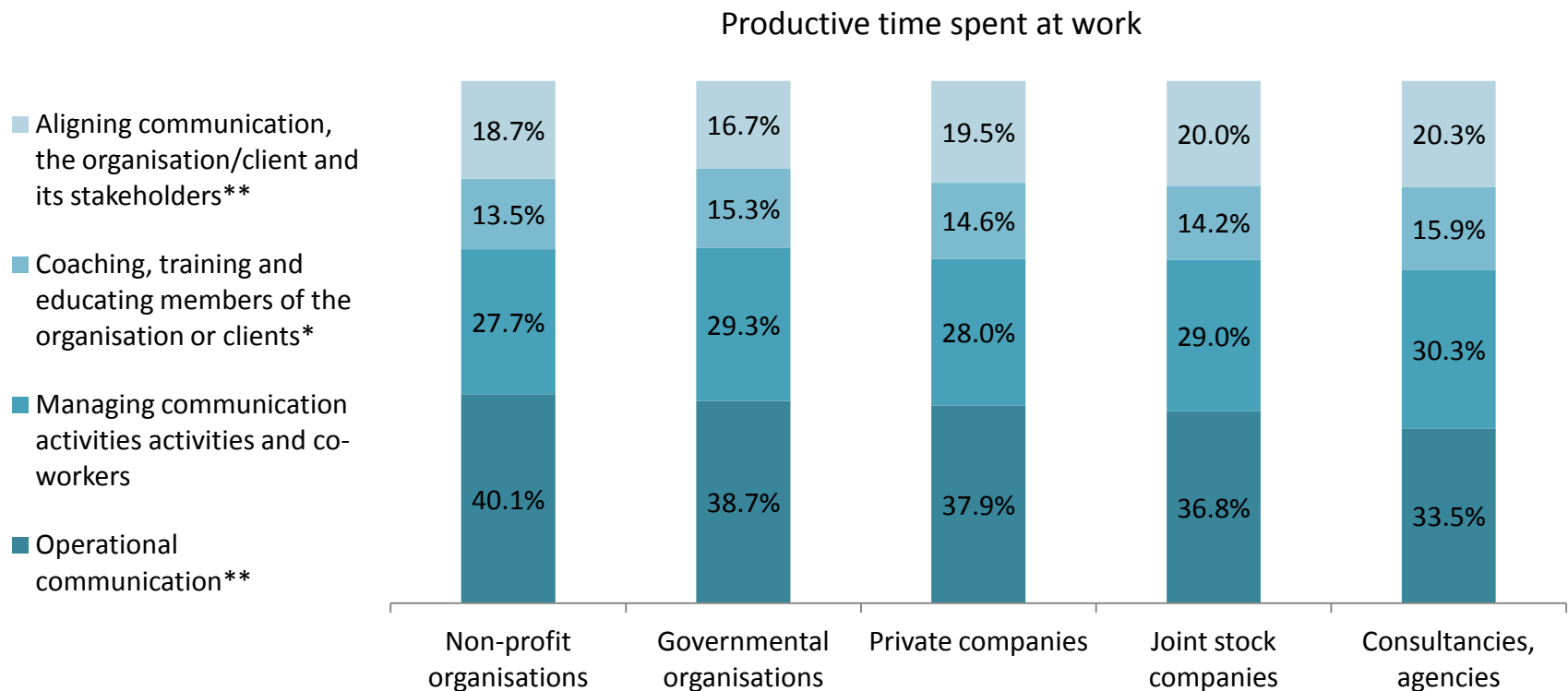


A stronger focus on management, coaching and goal orientation correlates significantly with the influence of the communication function



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

Professionals working in non-profit organisations use more time for operational communication and seldom engage in coaching colleagues



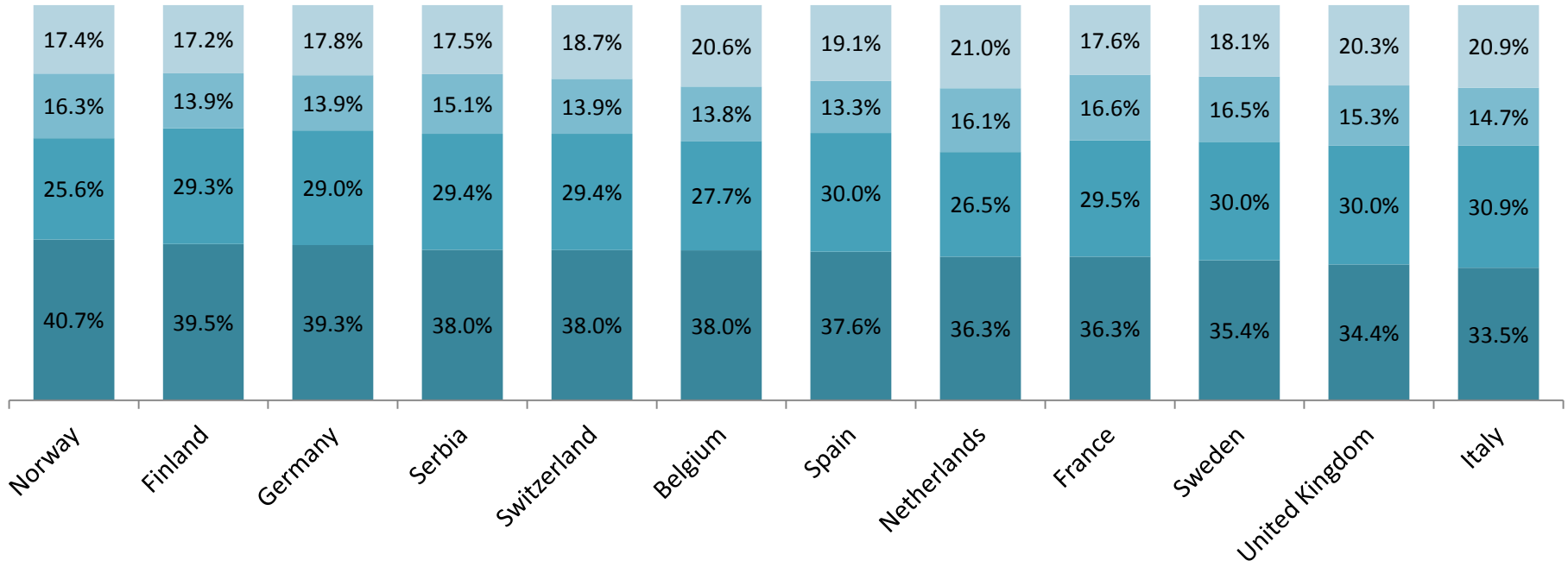
Activity profiles of communication professionals working in different functions

Professionals working in the field of ...	Operational communication	Managing communication activities and co-workers	Coaching, training and educating members of the organisation or clients	Aligning communication, the organisation/client and its stakeholders
Media relations, press spokesperson	45.1%	25.5%	12.8%	16.5%
Online communication, social media	40.8%	27.6%	14.5%	17.2%
Internal communication, change	40.1%	26.7%	14.1%	19.0%
Overall communication	39.0%	28.4%	14.3%	18.2%
International communication	38.0%	29.5%	12.5%	20.0%
Marketing, brand, consumer communication	35.4%	32.5%	13.2%	18.9%
Governmental relations, public affairs, lobbying	30.8%	28.9%	15.9%	24.4%
Consultancy, advising, coaching, key account	29.4%	29.6%	20.2%	20.9%
Strategy and coordination of the communication function	28.8%	33.5%	15.5%	22.2%

Practice of communication management in various countries

Productive time spent at work

- Aligning communication, the organisation/client and its stakeholders*
- Coaching, training and educating members of the organisation or clients
- Managing communication activities activities and co-workers
- Operational communication





Strategic issues, power and influence

Chapter overview

For European communication professionals coping with the digital evolution and the social web is still the most important strategic issue today and in the next three years. More than 46% of the respondents name this topic when asked for the three top challenges until 2015. Just like in the 2011 and 2010 surveys, the digital evolution is closely followed by the challenge of linking business strategy and communication effectively. 44% of the respondents think this an important issue. Since 2009 these two issues have been at the top of the list of strategic challenges for the profession. Coming third, and this year new on the list, is the need to address more audiences and channels with limited resources for communication (34%).

Other important issues are still the question of how to strengthen the role of the communication function in helping top management to take strategic decisions (34%) and how to build and maintain trust with the public and society (32%). Strikingly sustainability and social responsibility as well as transparency are considered much less an issue than in the previous years. In 2012, only every fifth respondent (21%) says that sustainability/responsibility is important and only 23% are challenged by transparency and active audiences. In 2011, both issues were considered much more important and mentioned by 37% and 35% respectively. This might be interpreted as a switch to routine mode: Many organisations have by now developed programs for corporate social responsibility communications and found ways to engage with critical publics, so management attention is now focusing on other challenges.

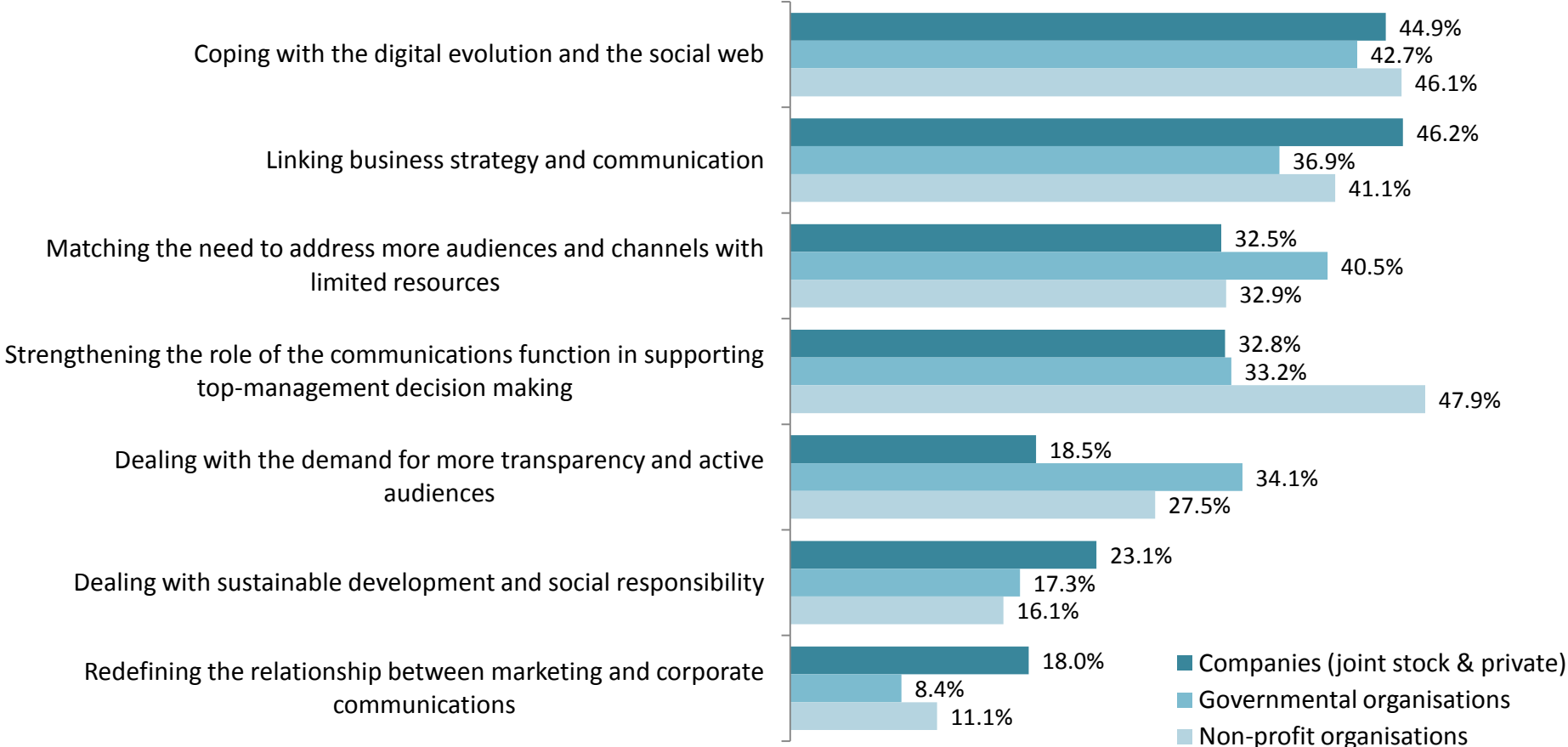
Not surprisingly the distribution of the top issues differs within the different types of organisations: in private and joint stock companies the issue of linking business and communication is considered to be the most important, in governmental organisations the need to reach all audiences with limited resources and in non-profit organisations strengthening the role of communication in strategic decision leads the priority list.

In the last year both advisory influence, that is the perception of how seriously senior managers take the recommendations of communication professionals, and executive influence, that is the perception of how likely it is that communication representatives will be invited to senior-level meetings dealing with organisational strategic planning, have decreased in Europe. The perception of advisory influence went down from nearly 78% in 2011 to less than 70% in 2012. Executive influence went down from almost 77% to 72%. This year it is the first time since the monitor started that these figures are dropping. A comparison shows that communication functions in the United States are better in these dimensions on average – however all Scandinavian states as well as Germany, the United Kingdom and the Netherlands report a stronger and partially much stronger executive influence.

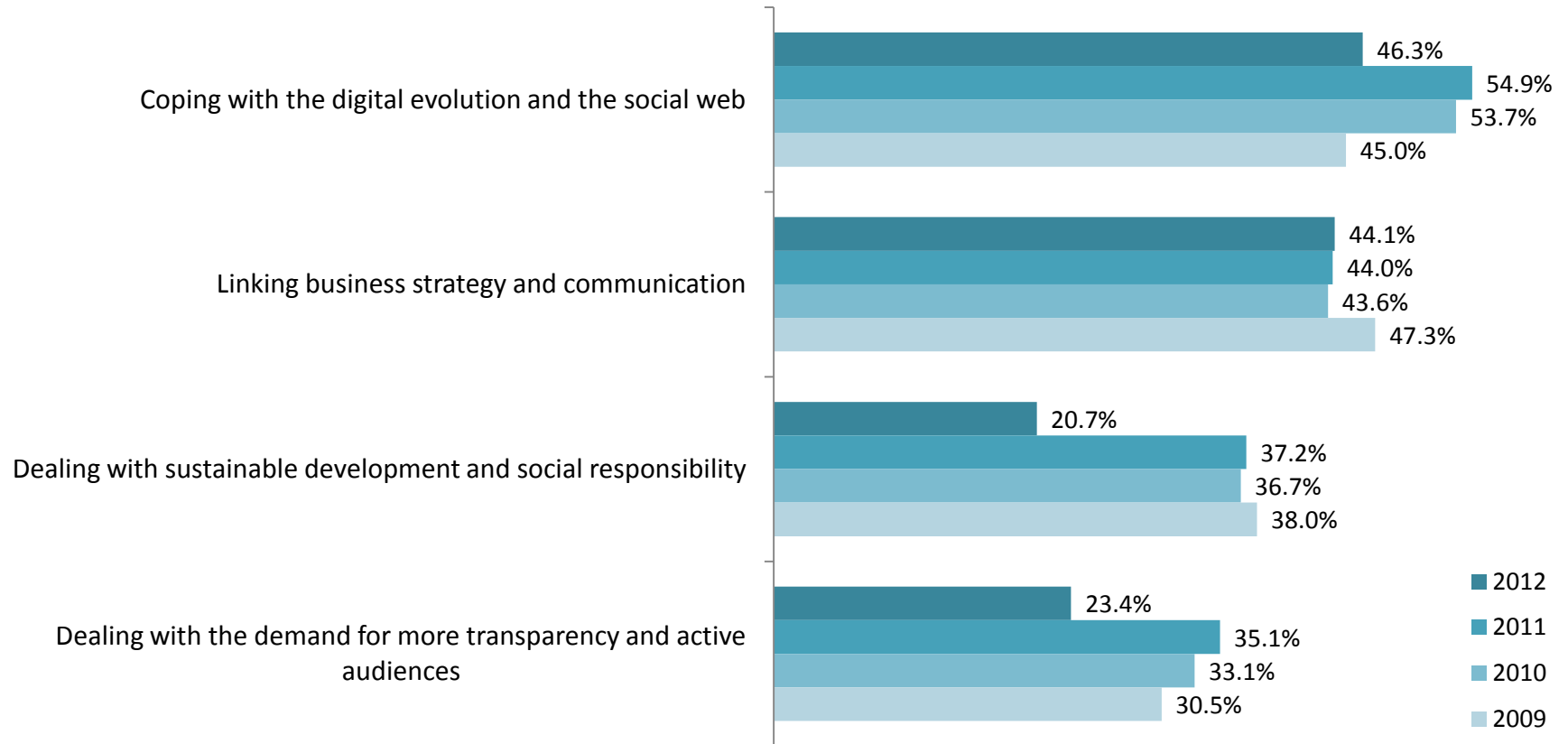
Most important strategic issues for communication management until 2015



Divergence of priorities and top issues in various types of organisations



Relevance of strategic issues compared to previous surveys



Influence of the communication function

Advisory influence



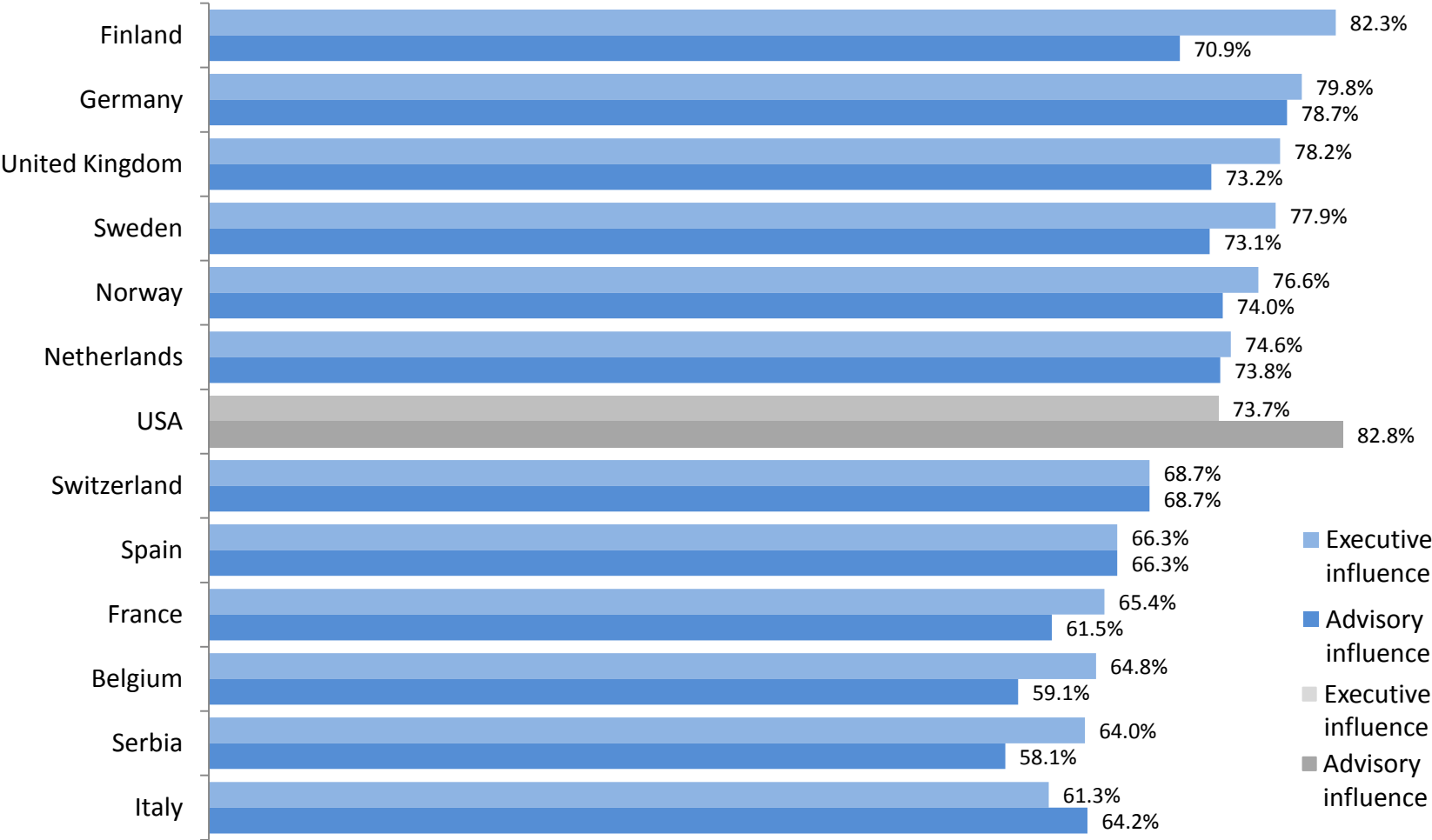
In **69.4%** of European organisations, recommendations of the communication function are taken seriously by senior management

Executive influence



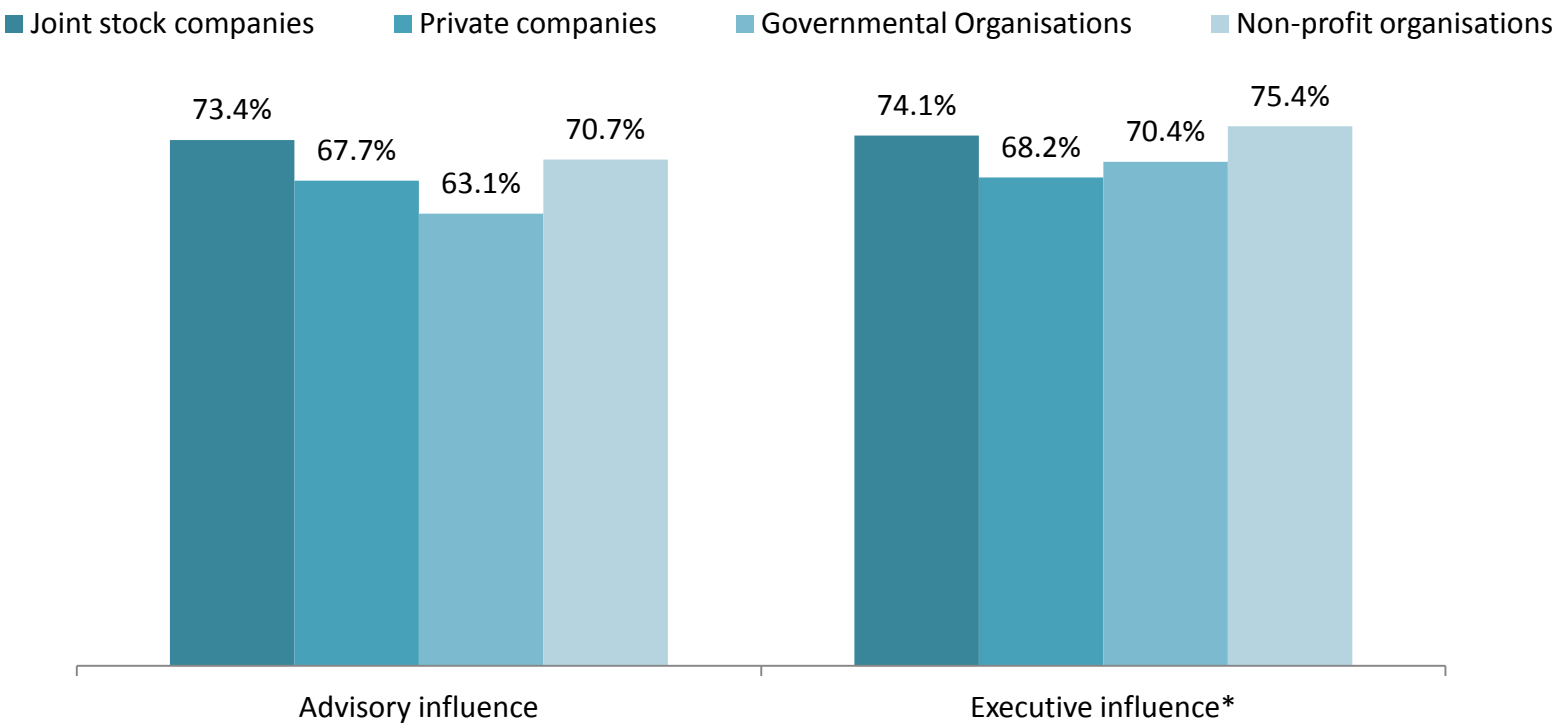
In **72.0%** of European organisations, the communication function is likely to be invited to senior-level meetings dealing with organisational strategic planning

Compared to the United States, some European countries report a stronger involvement of the communication function in organisational planning



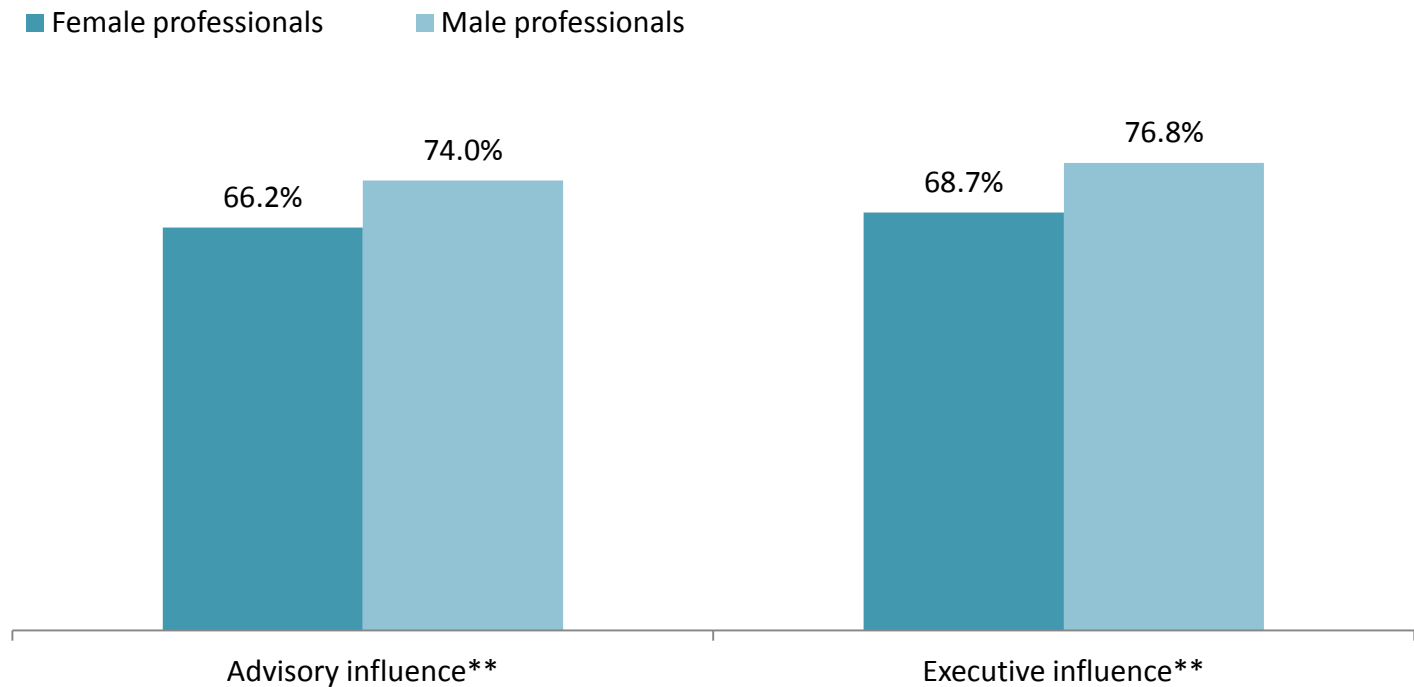
www.communicationmonitor.eu / Zerfass et al. 2012 / n = 1,712 PR professionals in communication departments. Swerling et al. 2012 / n = 616 US PR professionals working in communication departments / Advisory influence, Q 26: In your organisation, how seriously do senior managers take the recommendations of the communication function? / Executive influence, Q 27: How likely is it, within your organisation, that communication would be invited to senior-level meetings dealing with organisational strategic planning?; Scale 1 (never) – 7 (always). Considered scale points 5-7.

Influence of the communication function in European organisations: Joint-stock companies and non-profits are leading the field



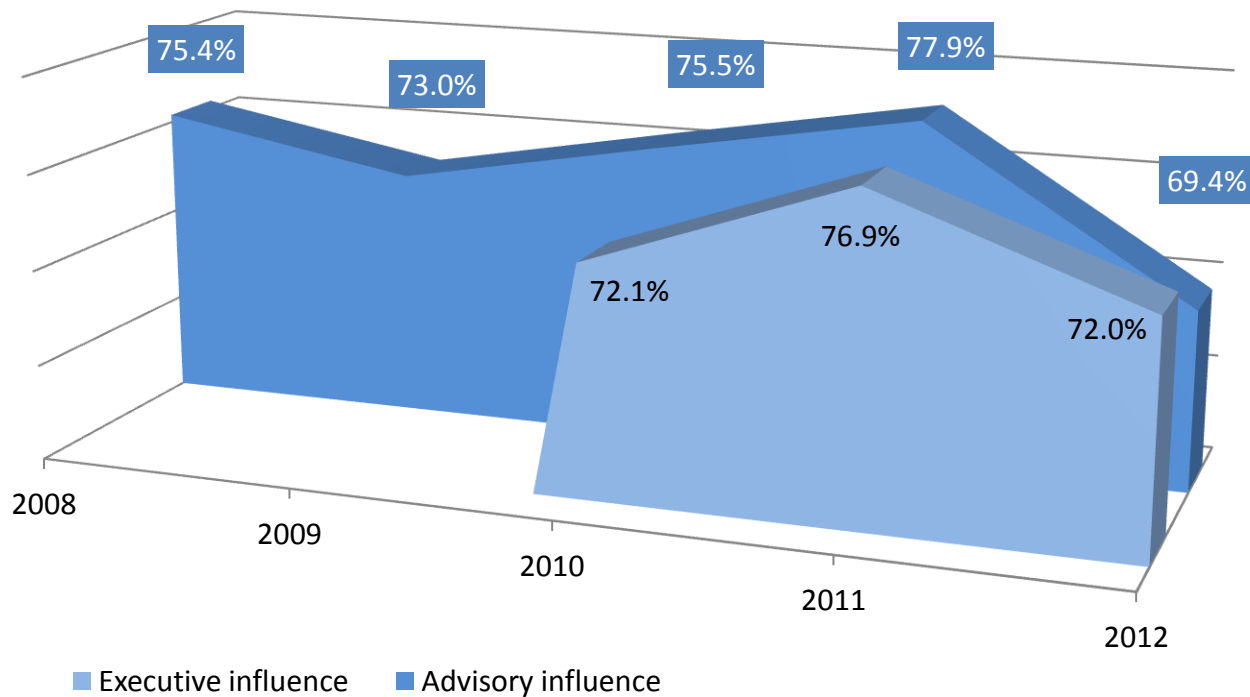
www.communicationmonitor.eu / Zerfass et al. 2012 / n = 1,712 PR professionals working in communication departments / Advisory influence, Q 26: In your organisation, how seriously do senior managers take the recommendations of the communication function? / Executive influence, Q 27: How likely is it, within your organisation, that communication would be invited to senior-level meetings dealing with organisational strategic planning? Scale 1 (never) – 7 (always). Considered scale points 5-7. * Significant differences (chi-square test, p ≤ 0.05).

Female practitioners perceive a lower influence of communication departments than their male counterparts



www.communicationmonitor.eu / Zerfass et al. 2012 // n = 1,712 PR professionals working in communication departments / Advisory influence, Q 26: In your organisation, how seriously do senior managers take the recommendations of the communication function? / Executive influence, Q 27: How likely is it, within your organisation, that communication would be invited to senior-level meetings dealing with organisational strategic planning? Scale 1 (never) – 7 (always). Considered scale points 5-7. ** Highly significant differences (chi-square test, $p \leq 0.01$).

Perception of advisory and executive influence is changing over the years



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 1,712 PR professionals working in communication departments. Advisory influence, Q 26: In your organisation, how seriously do senior managers take the recommendations of the communication function? / Executive influence, Q 27: How likely is it, within your organisation, that communication would be invited to senior-level meetings dealing with organisational strategic planning? Zerfass et al. 2011 / n = 1,449 / Q 7. Zerfass et al. 2010 / n = 1,511 / Q 4. Zerfass et al. 2009 / n = 1,267 / Q 3. Zerfass et al. 2008 / n = 1,027 / Q 1. Executive influence: wording in the questionnaire was changed 2010 in line with the US GAP surveys (Swerling et al. 2012). Scale 1 (never) – 7 (always). Considered scale points 5-7.



Social media: Importance, implementation and skills

Chapter overview

The survey reveals a large gap between the perceived importance of social media tools for communication and the actual rate of implementation in European organisations. Most obviously, mobile applications have entered the top three ranks of important social media platforms, but at the same time the backlog of implementation is higher than in any other field.

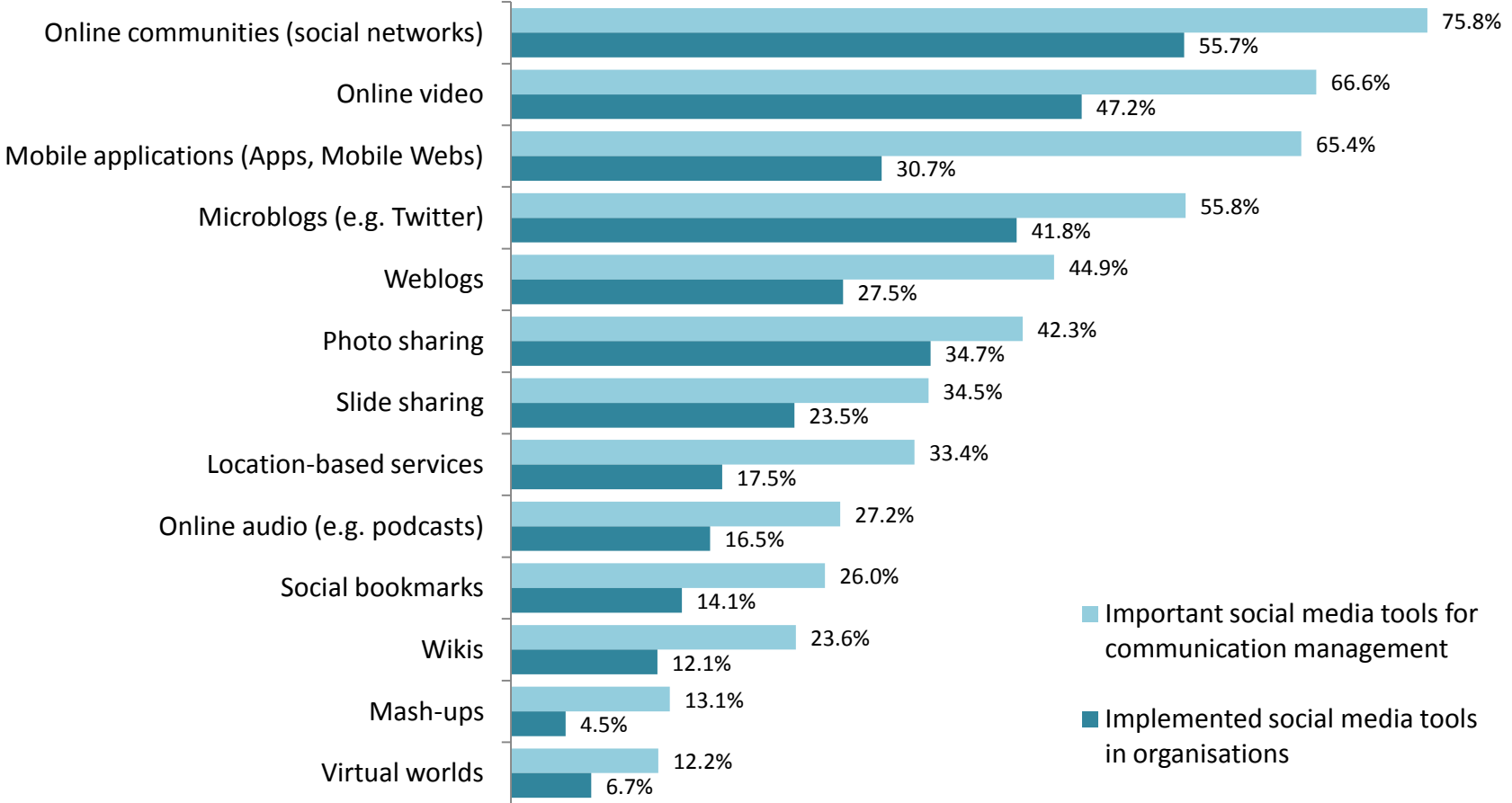
European communication professionals consider online communities or social networks as by far the most important social media tool available. With more than 75% support by respondents, it is leading the list of important social media tools. Online communities are followed by online videos ranking second in importance (67%), mobile applications like apps and mobile webs ranking third (65%), micro blogs (e.g. Twitter) ranking fourth (56%) and weblogs ranking fifth (45%). However, less than 56% of the communication departments actually use online communities in their communication, a gap of more than 20% compared to the importance this tool is given by the practitioners. The biggest difference between importance (65%) and implementation (31%) is found for mobile applications, a gap of almost 35%. A cross-matrix analysis shows that mobile applications, weblogs and photo sharing are considered the most important opportunities in social media communication.

The results show differences in social media use by communication professionals in Europe and in the United States as well as differences in support for the use of certain tools between European regions. Surprisingly communication practitioners have overestimated the growth of social media use by their organisations. In 2011 they predicted a bigger increase in importance than was actually recorded this year.

All communication managers report rather moderate skills for using digital technologies for internal and external communication, regardless of their gender. Quite logically, digital skills increase when the age of the professionals questioned decreases. Younger professionals report higher personal skills in using online and similar technology than their older colleagues. Reported digital skills also differ according to the area professionals are working in. Professionals working in overall communication, international and public affairs, media relations and marketing communications score lower than professionals working in strategy, internal communication and of course online communication.

Despite the unsatisfactory level of digital skills, only every second respondent thinks that training is useful. Informal approaches to enhance those skills are clearly favoured. Eight out of ten European professionals think that the best way to learn about online tools is to use them as part of the regular work as well as privately. These two ways of learning are by far the most popular among communication practitioners.

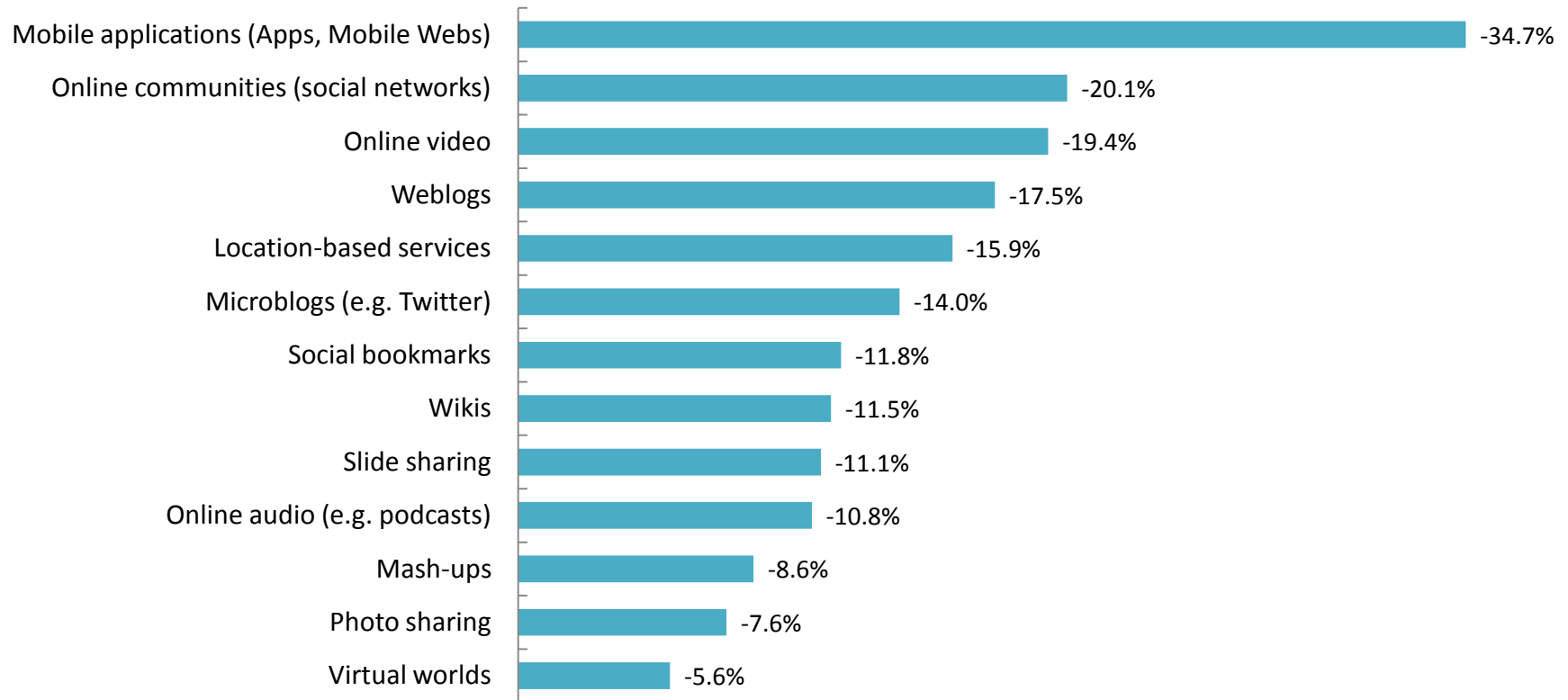
Social media tools in communication management: Importance and implementation in European organisations



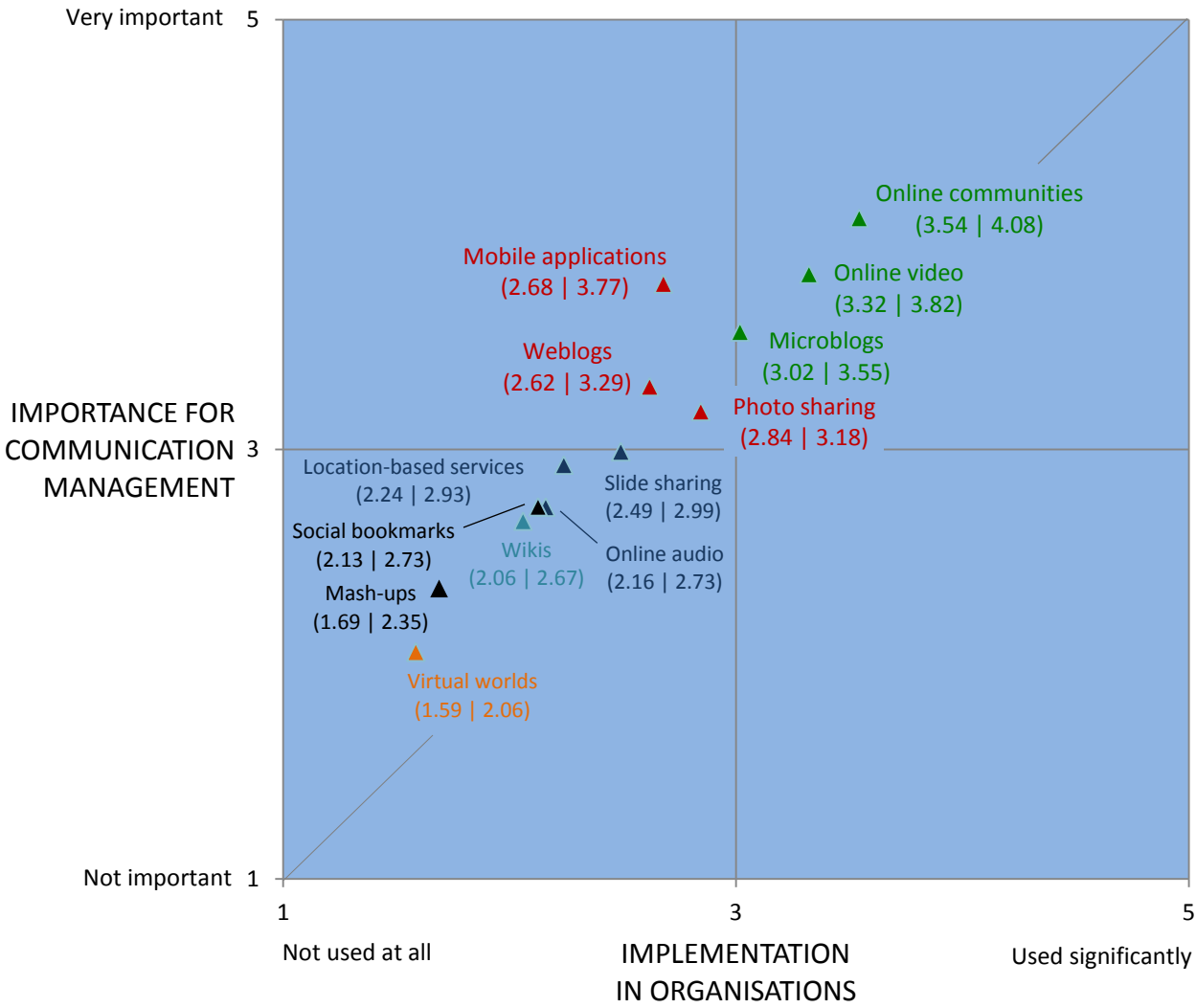
www.communicationmonitor.eu / Zerfass et al. 2012 / n^{min} = 1,900 PR professionals. Q 10: Can you indicate the level of importance today for communication management (in general) of the following tools? / Q 11: To what extent has your organisation implemented these instruments in its daily communication activities? Scale 1 (not important / not used at all) – 5 (very important / used significantly). Considered scale points 4-5.

Communication management has to catch up in the field of mobile applications

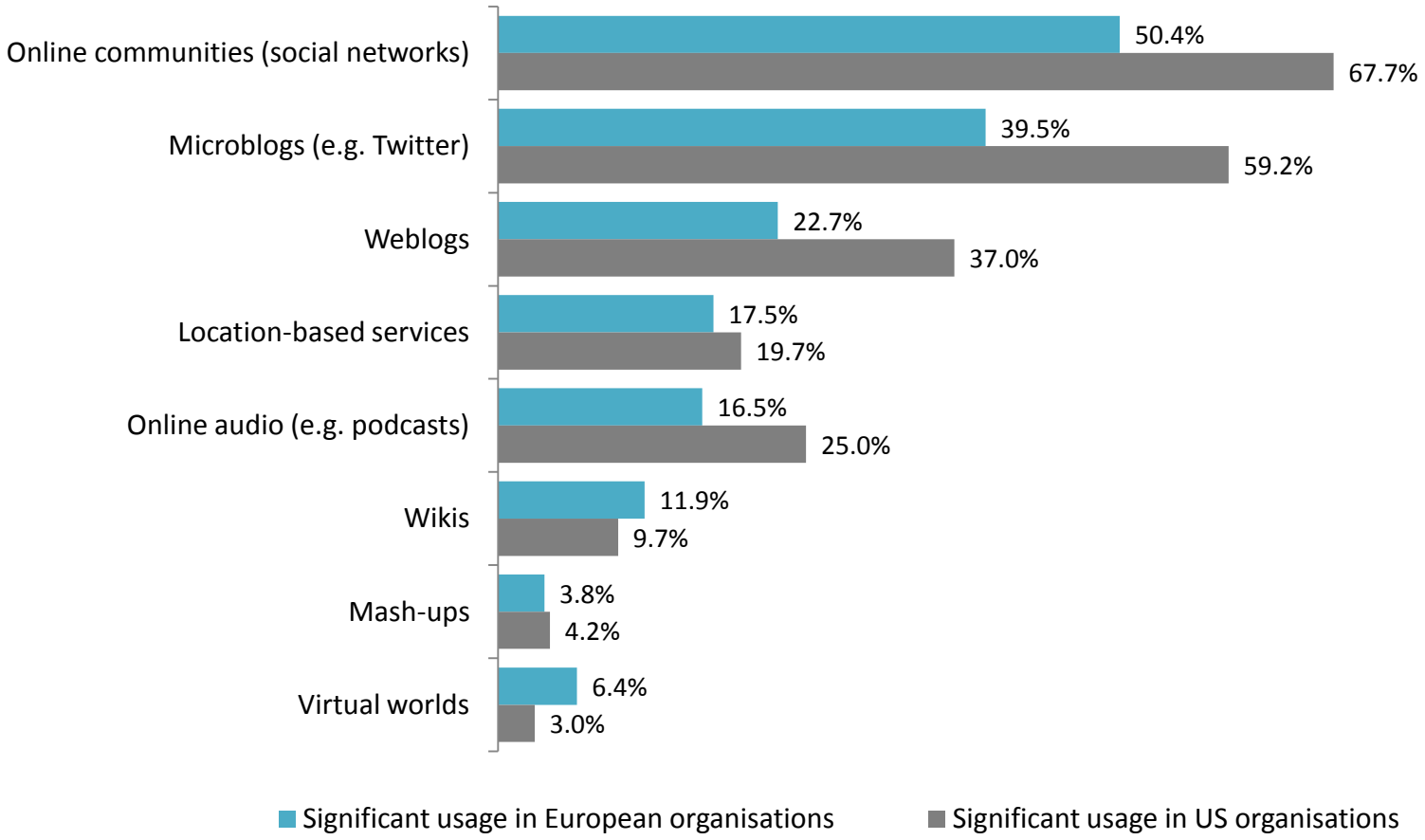
Gap between importance and current implementation of social media tools in communications



Opportunities and needs for enhancing social media communication

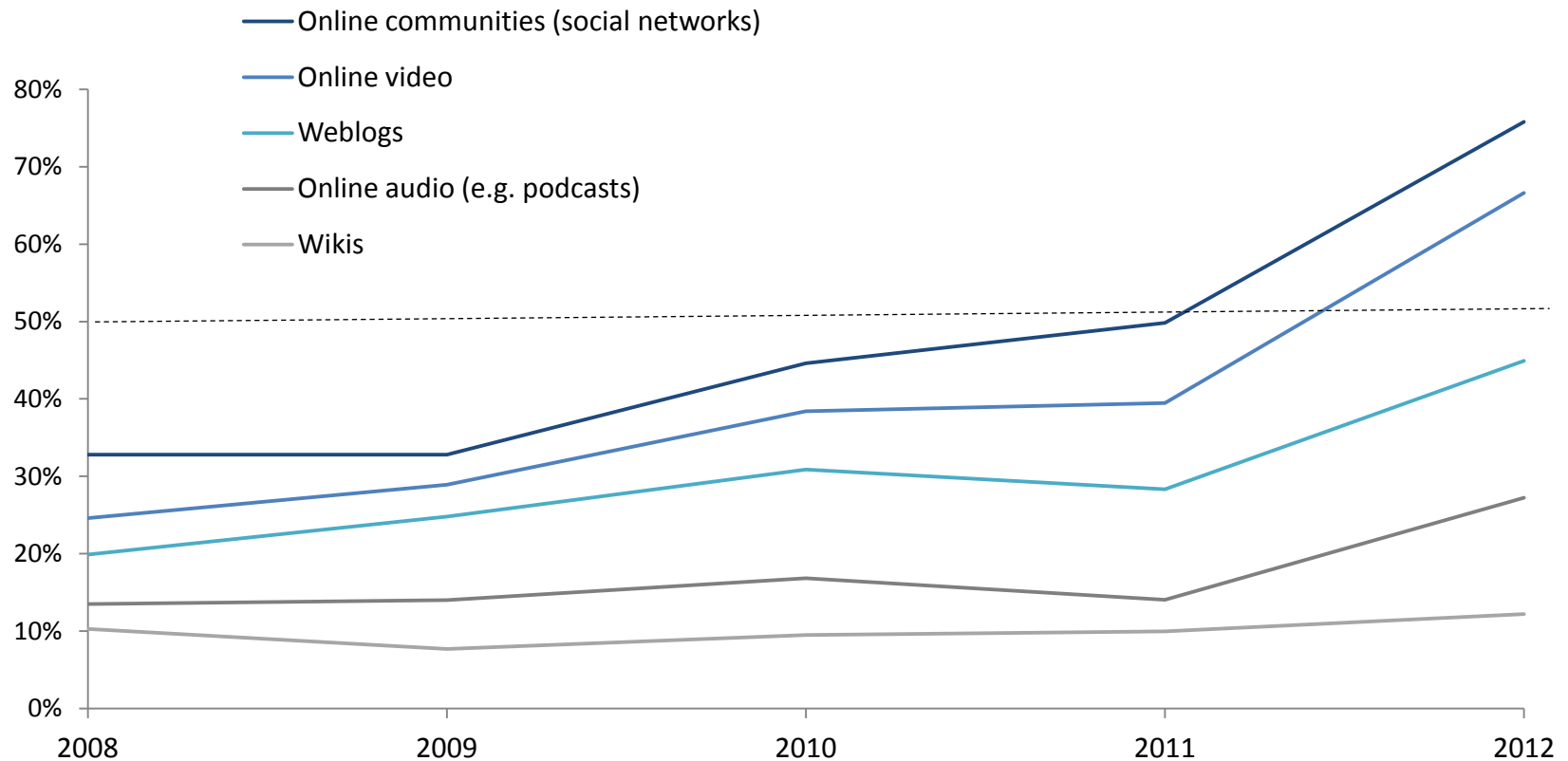


Usage of social media communication tools in European and US organisations



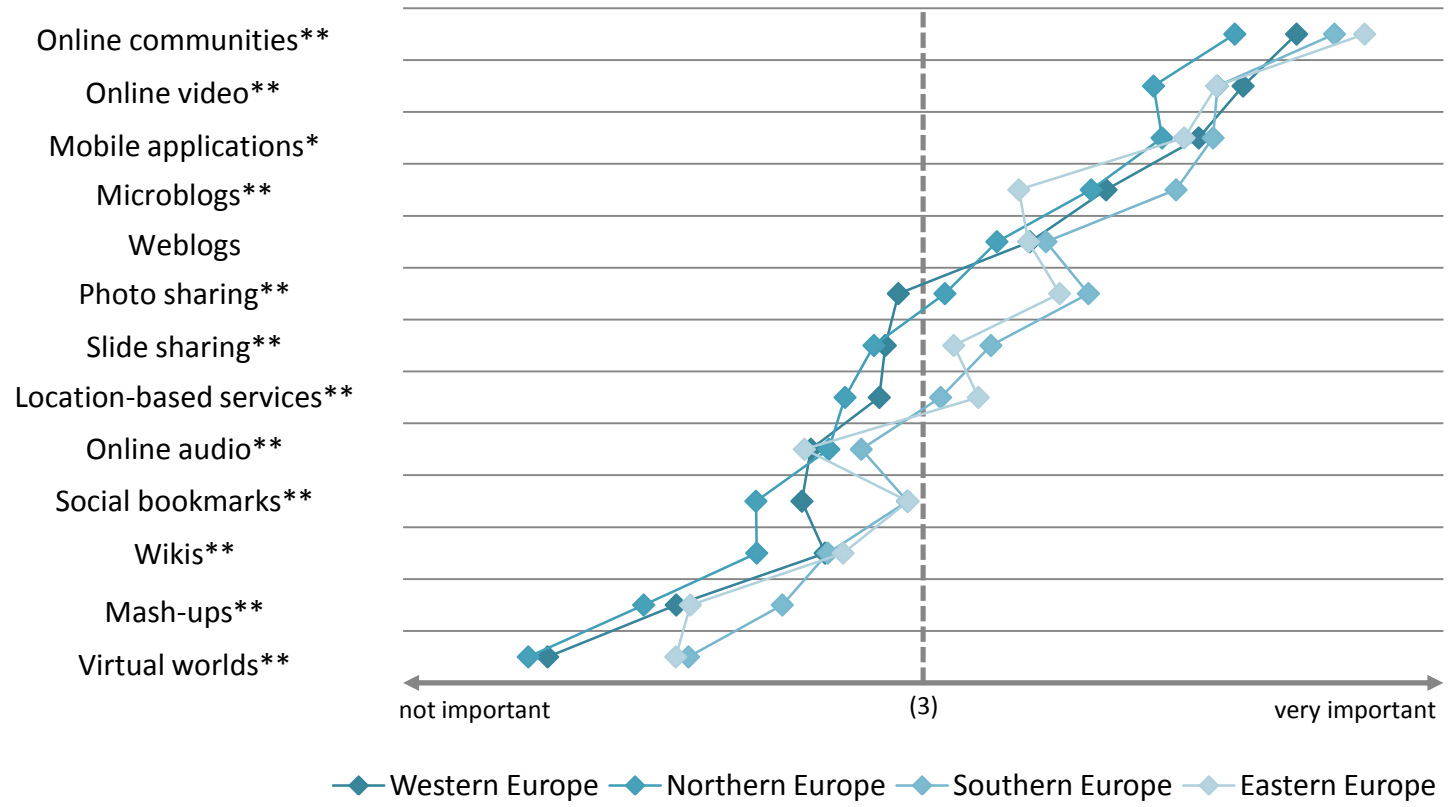
www.communicationmonitor.eu / Zerfass et al. 2012 / n^{min} = 1.485 European PR professionals working in communication departments / Swerling et al. 2012 / n = 569 US PR professionals working in communication departments / Q 11: To what extent has your organisation implemented these instruments in its daily communication activities? Scale 1 (not used at all) – 5 (used significantly). Considered scale points 4-5. US study: Scale 1-7. Considered scale points 5-7.

Importance of social media tools is steadily growing; but only online communities and videos are supported by a majority of communication professionals



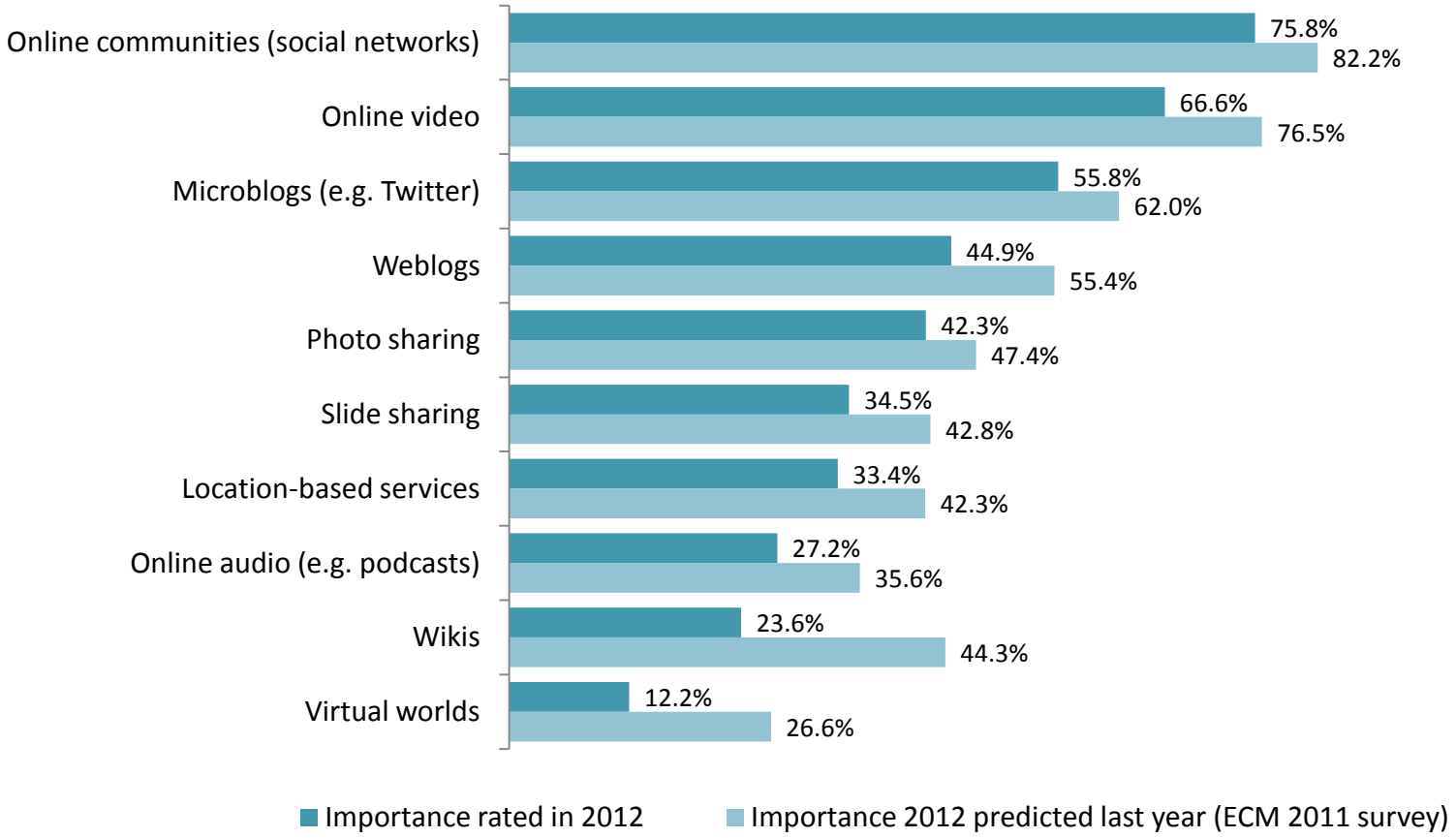
Perception of importance differs significantly in various European regions

Importance of social media tools (mean values)



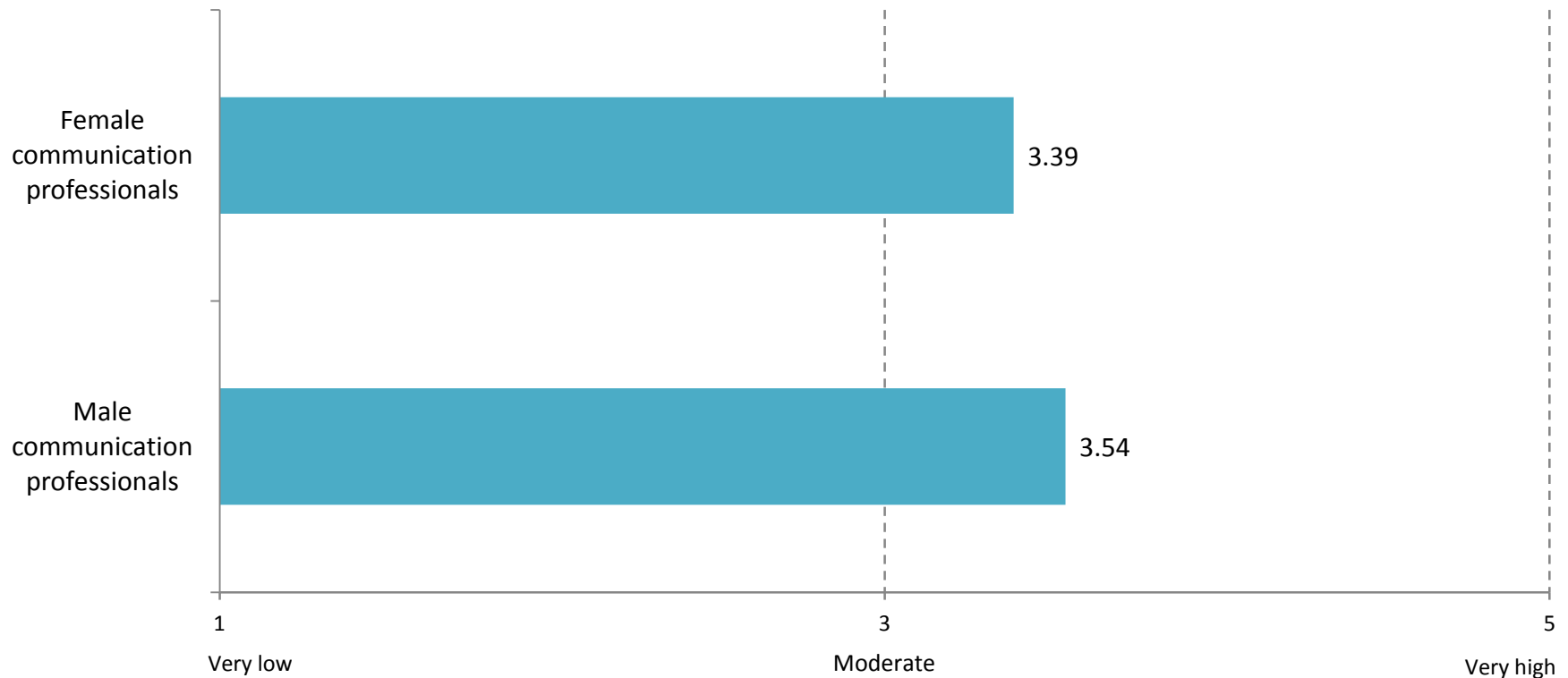
www.communicationmonitor.eu / Zerfass et al. 2012 / n = 1,925 PR professionals. Q 10. * Significant differences (chi-square test, p ≤ 0.05). ** Highly significant differences (chi-square test, p ≤ 0.01).

Communication professionals overestimate the growth of importance in social media



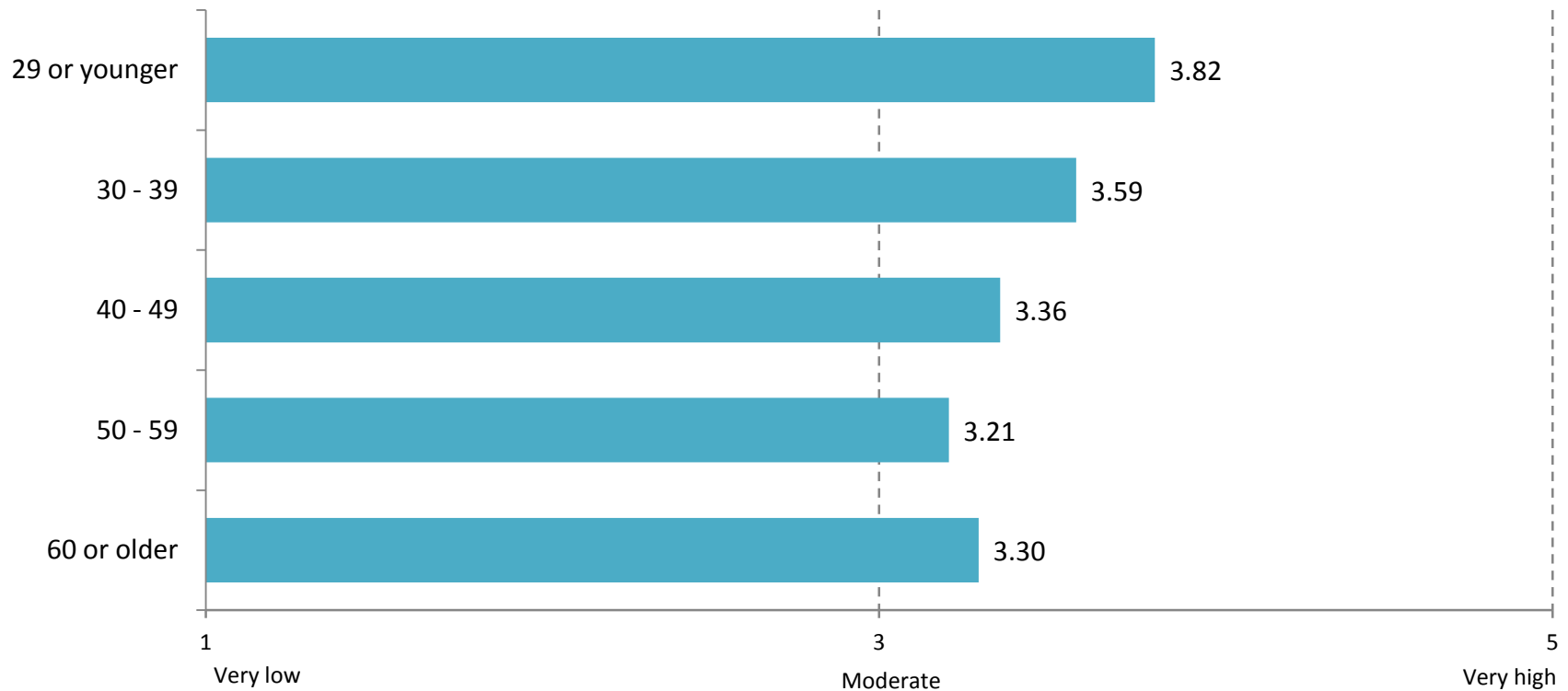
Skills for using digital technologies are rather moderate

Personal skills in using digital technologies for internal and external communications



Younger professionals are more competent in the digital world

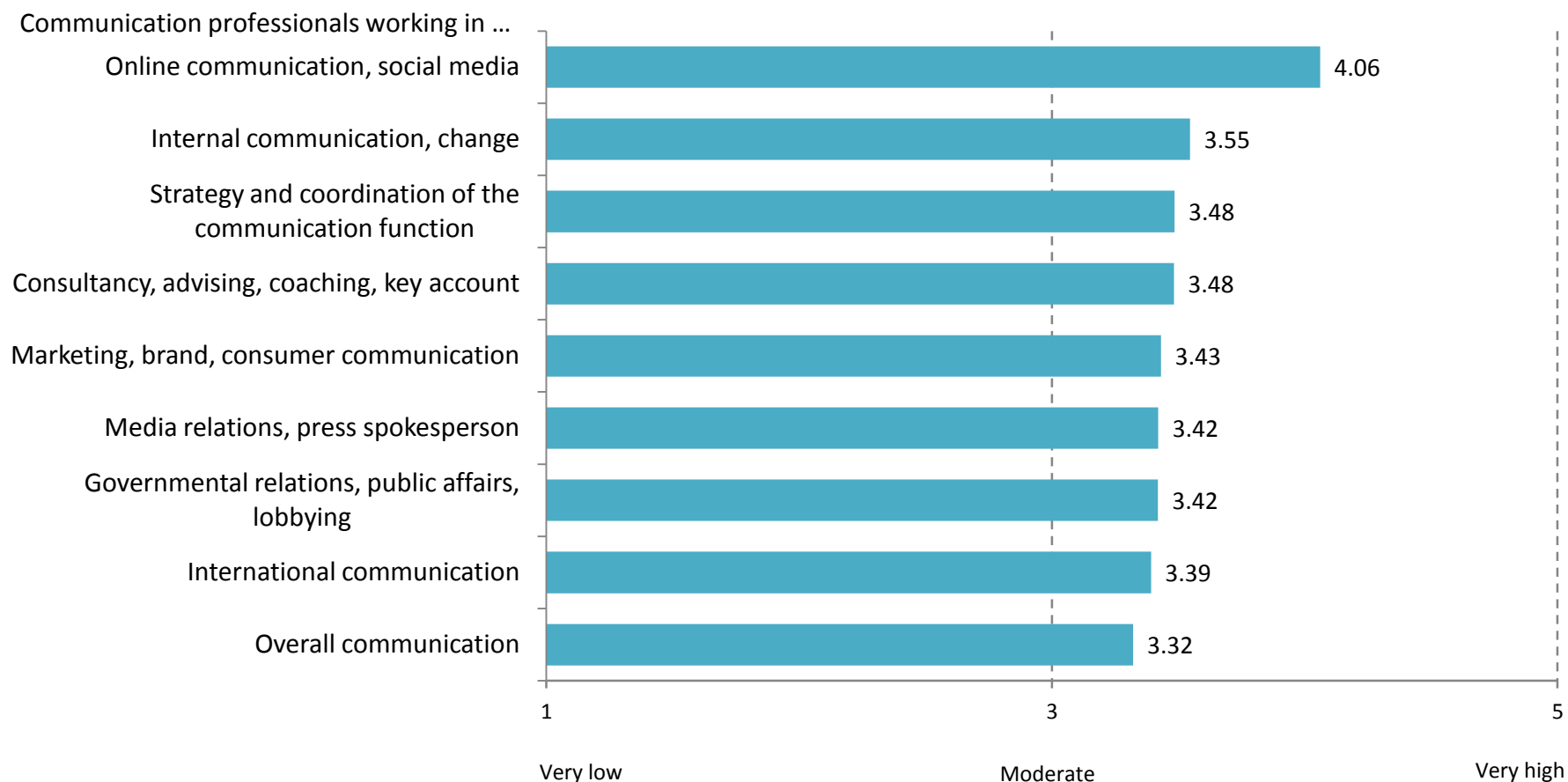
Personal skills in using digital technologies for internal and external communications



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,185 PR professionals. Q 12: How do you rate your personal skills in using digital technologies for internal and external communications? Scale 1 (very low) – 5 (very high). Mean values. highly significant differences (Kendall’s rank correlation, $p \leq 0.01$; $\tau = -0.164$).

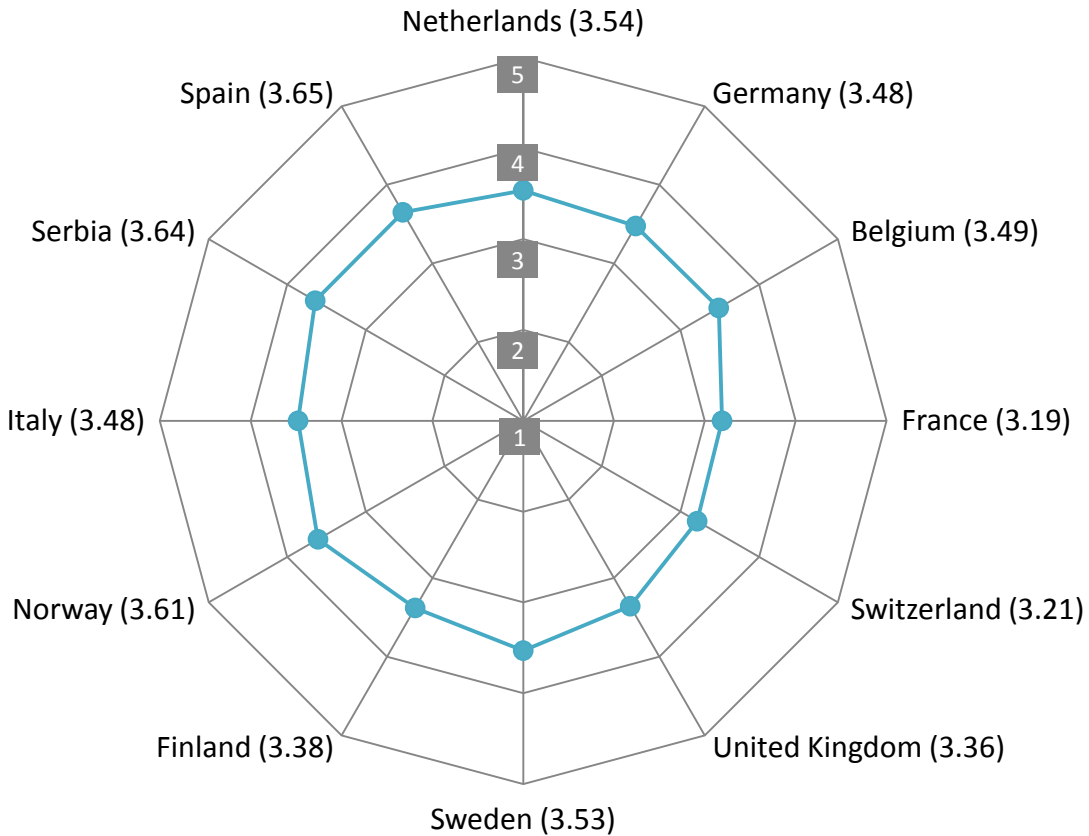
Minor differences between digital skill levels in various fields of practice; even online experts are cautious about their abilities

Personal skills in using digital technologies for internal and external communications



Digital skills are on different levels throughout Europe

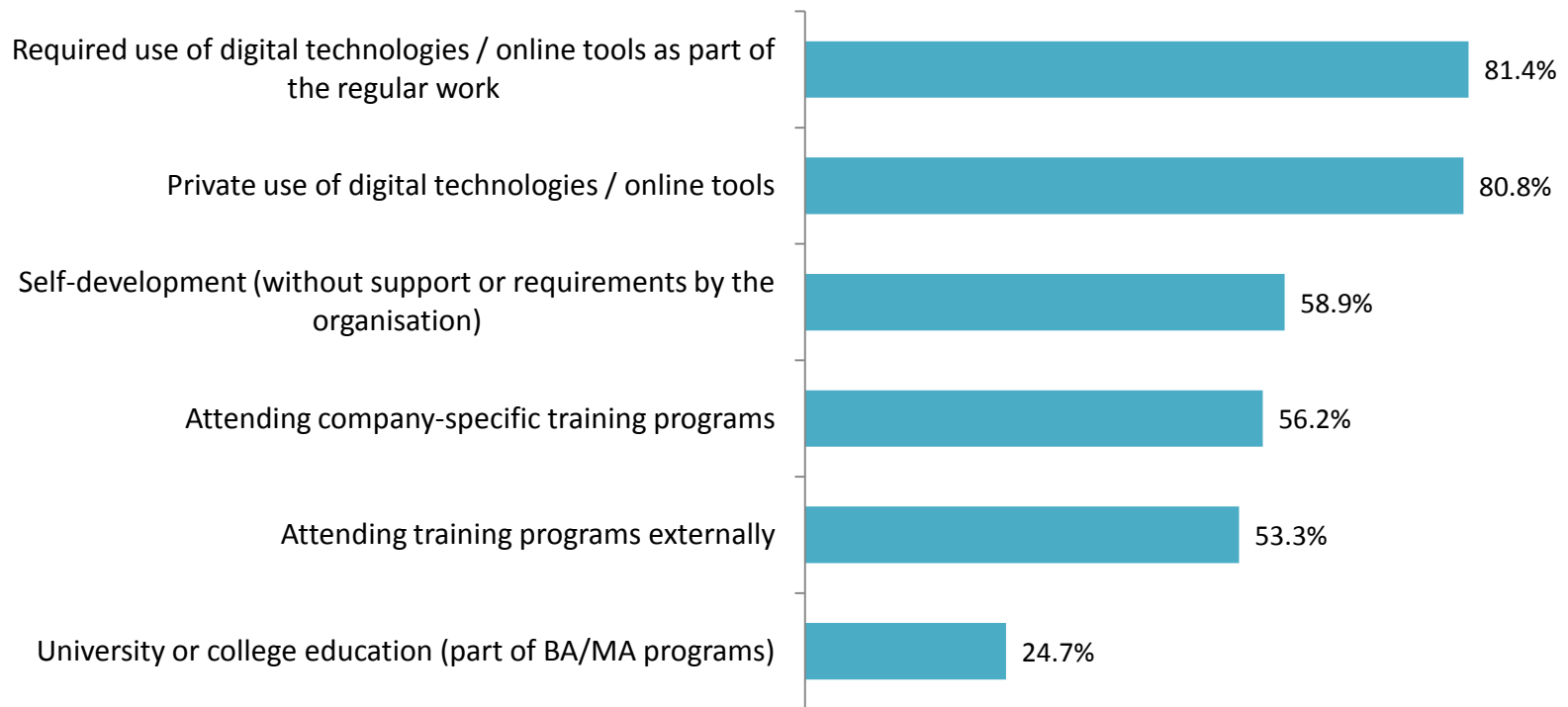
Personal skills in using digital technologies for internal and external communications



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,185 PR professionals. Q 12: How do you rate your personal skills in using digital technologies for internal and external communications? Scale 1 (very low) – 5 (very high). Mean values. Significant differences (ANOVA, p ≤ 0.01; F = 2.910).

Informal approaches to enhance digital skills are clearly favoured by professionals; only every second respondent thinks that training is useful

Suitable ways to learn digital skills for communication practitioners





Professional training and development

Chapter overview

As professional communicators are moving from mostly operational to more managerial, educational and reflective levels, building competencies and skills is the next big challenge both for individuals and organisations (Tench, 2012; Sha, 2011; Jeffrey & Brunton, 2011). In a complex world, one would assume that communication professionals align their development with academic learning. But besides initial university education, communicators in Europe rely on professional associations and commercial training providers for further professional development. Moreover, current levels of knowledge and needs for further development are mostly evaluated through informal self-assessments: comparing oneself with colleagues and peers in other organisations is the most important method across all sectors (65%). Breaking out of this fallacious circle by consulting academic knowledge or using formal self-evaluation systems by organisations is only valued by 27% and 17%, respectively.

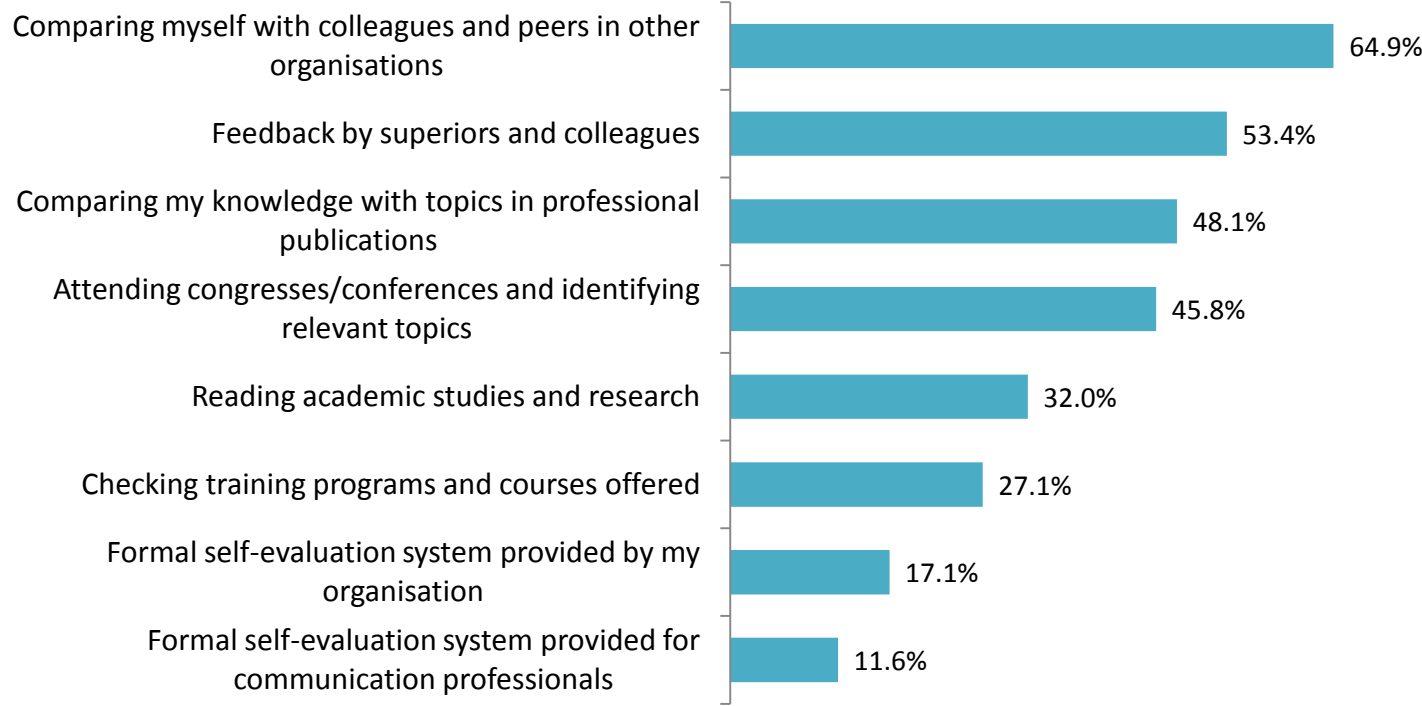
An ambiguous picture evolves when measuring the days spent by European communication professionals on personal training in 2011 and comparing this to the plans for 2012. The percentage of people who will not train at all is increasing to 14% in 2012 from 9% in 2011. Continuing this theme, the percentage of those who will train one to three days or 4 to 5 days is going down. But at the same time, percentages for longer training periods are mostly rising: for six to ten days from 16% to 19% and for those lasting more than 15 days from 16% to almost 18%. What is interesting to see is that days spent on education and training are significantly longer in Southern and Eastern Europe than Western or Northern Europe: personal training lasting more than 15 days is planned by roughly 10% of Western and Northern Europeans with a median of 4 to 5 days, but by 22% of Eastern Europeans and 27% of Southern Europeans (median: 6-10 days). Among the countries, Spain and Serbia use to spend the highest amounts of time on development activities, while France and the United Kingdom the least.

Numbers, however, do not speak for themselves and there are several possible alternative explanations: the East and South have professionally much to catch-up and are therefore investing in education and training to do so; intensity of work in the East and South is lower than in the North and West, so it is easier to leave one's organisation for several days spent on development; payment packages are different and Westerners and Northerners get more in cash while Easterners and Southerners are compensated also through provisions for training; inadequate basic academic education in the East and South demands more investment in staff training by employers; and governments sometimes use education and training policies as a labour market tool. In order to prove or sort out some of these explanations, further research is needed.

The most important training providers in Europe are national professional associations and training organisations run by them, followed by further education institutions specialised in public relation and communication. Companies use universities and colleges significantly more often (42%) than governmental (32%) and non-governmental organisations (31%).

How communication professionals evaluate their knowledge and development needs

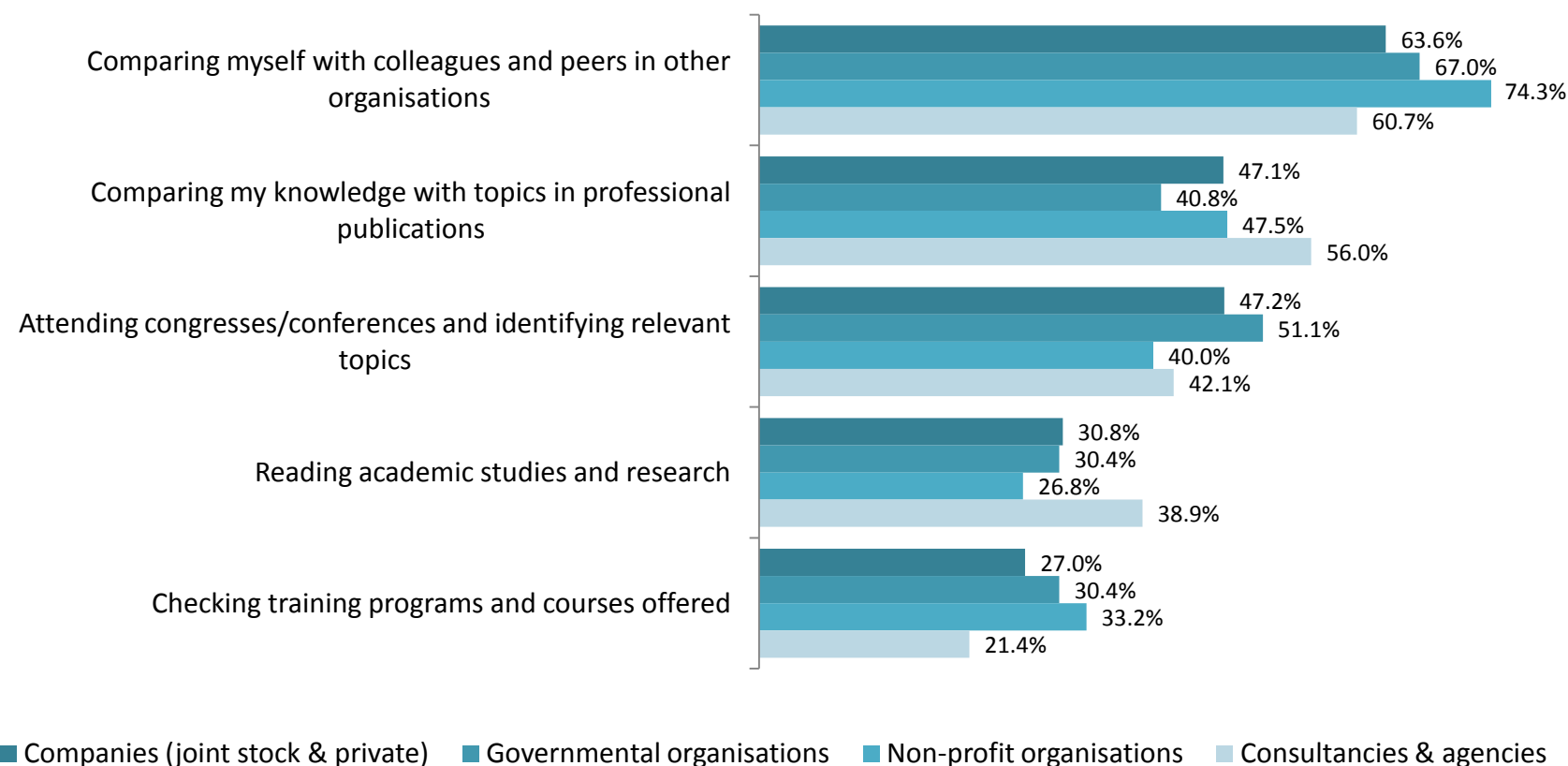
Most important means for self-assessment



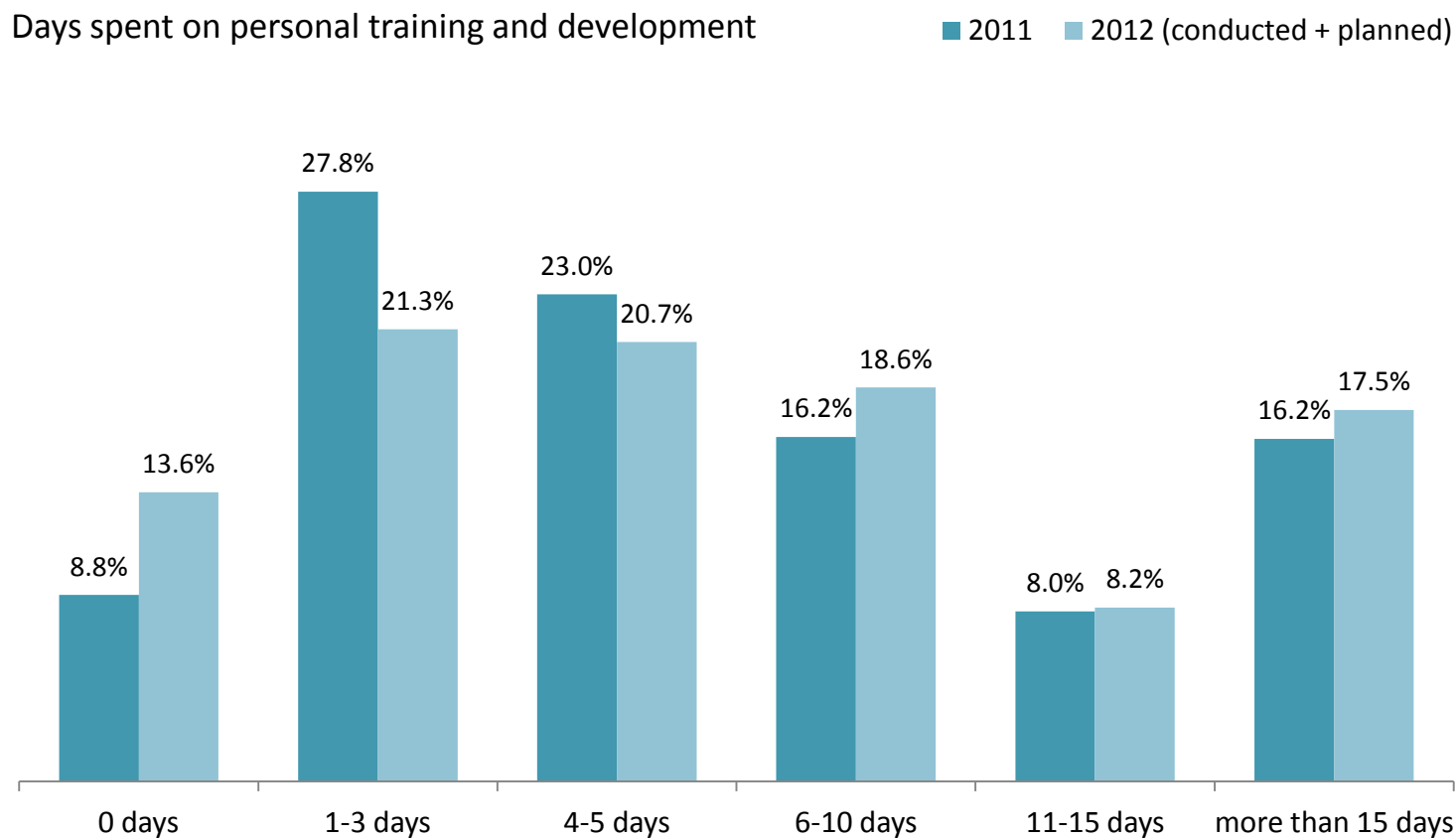
www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,185 PR professionals. Q 14: Which of the following means do you use to identify the level of your professional knowledge and potential development needs? Please pick the three most important! Figure displays percentage of respondents who chose items as Top-3 issue.

Different approaches to personal development in various types of organisations

Most important means for self-assessment

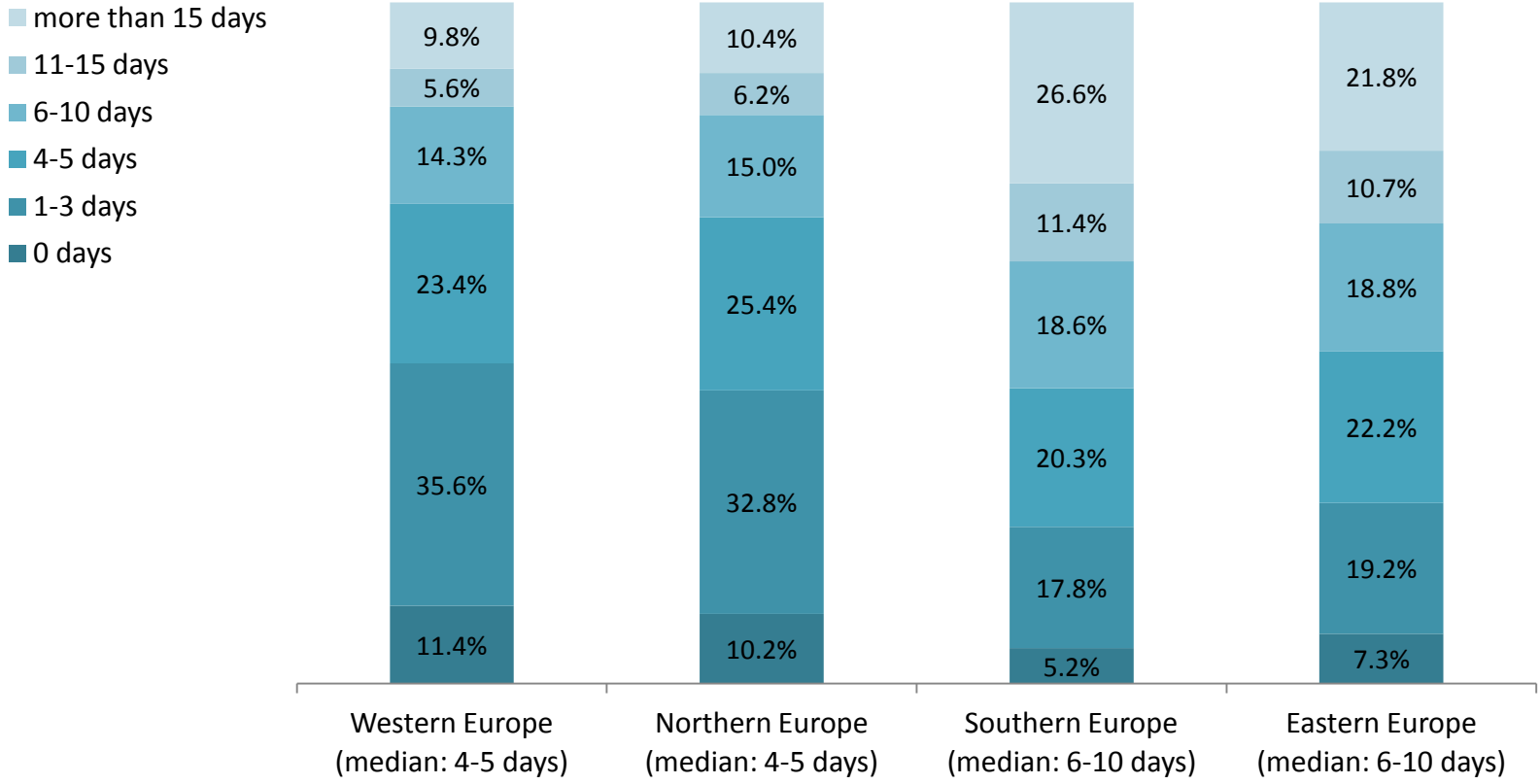


Professional education: Days spent on personal training last year and this year



Communication practitioners in Southern and Eastern Europe spent more time on personal training in 2011

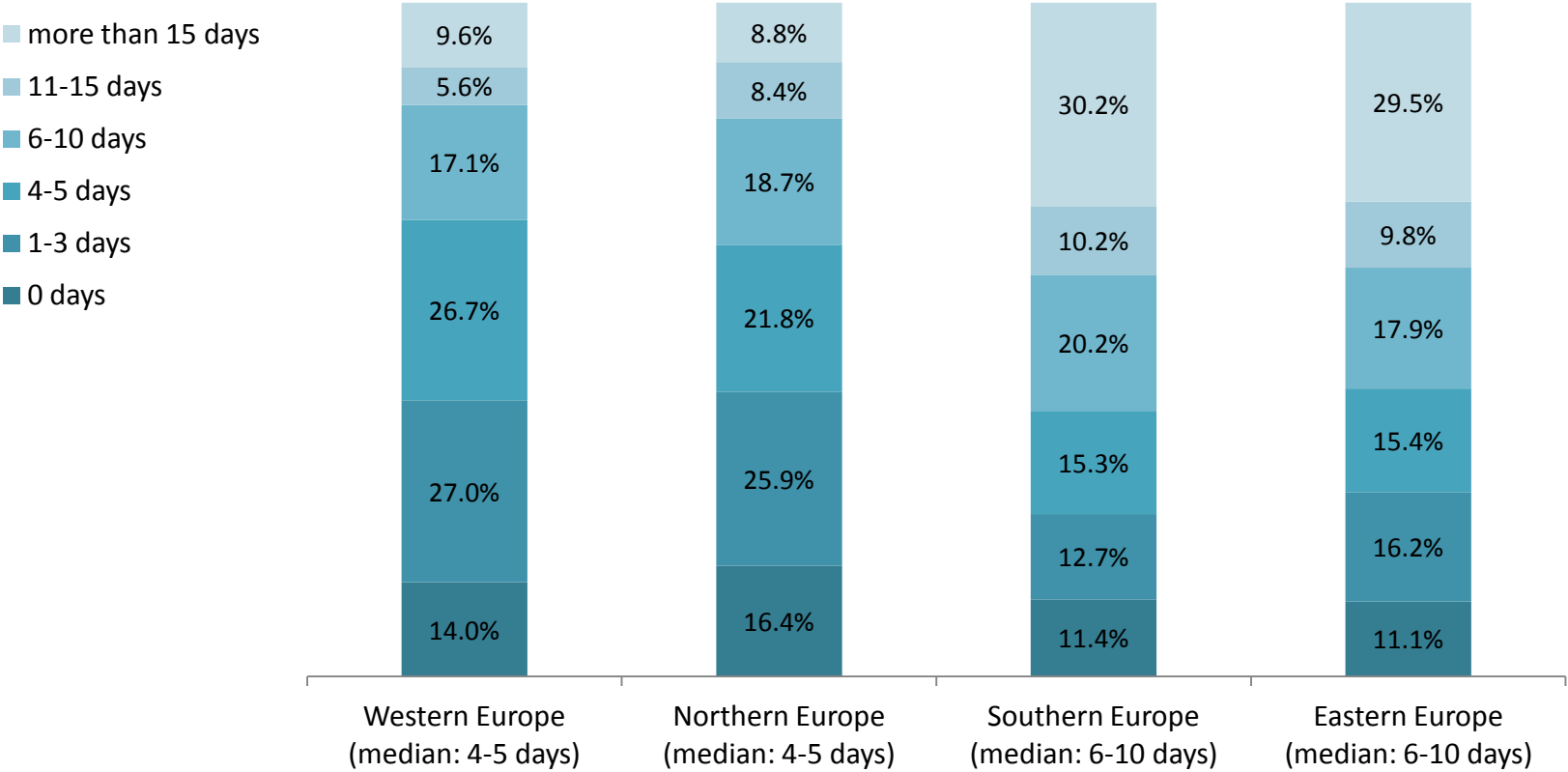
Days spent on personal training in 2011



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,185 PR professionals. Q 16: In the last year, how many days have you spent on personal training and development in any fields? Q 17: And how many days of training have you planned for this year?

In 2012, professional training will grow further in Eastern Europe

Days planned for personal training and development in 2012



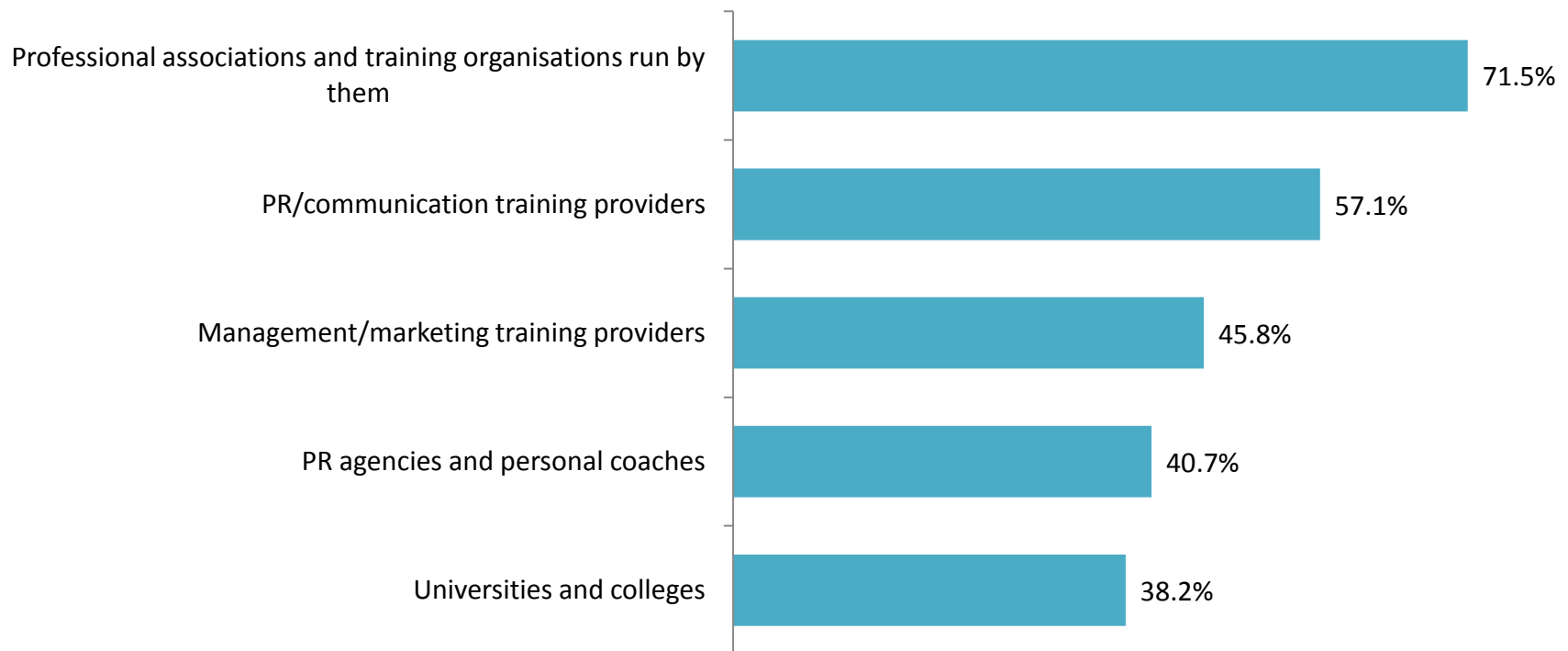
www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,185 PR professionals. Q 16: In the last year, how many days have you spent on personal training and development in any fields? Q 17: And how many days of training have you planned for this year?

Country-by-country analysis of development activity

	Training in 2011	Training in 2012
Belgium	4-5 days	4-5 days
Finland	4-5 days	4-5 days
France	1-3 days	1-3 days
Germany	4-5 days	4-5 days
Italy	4-5 days	6-10 days
Netherlands	4-5 days	4-5 days
Norway	4-5 days	4-5 days
Serbia	6-10 days	6-10 days
Spain	6-10 days	6-10 days
Sweden	4-5 days	4-5 days
Switzerland	4-5 days	4-5 days
United Kingdom	4-5 days	1-3 days

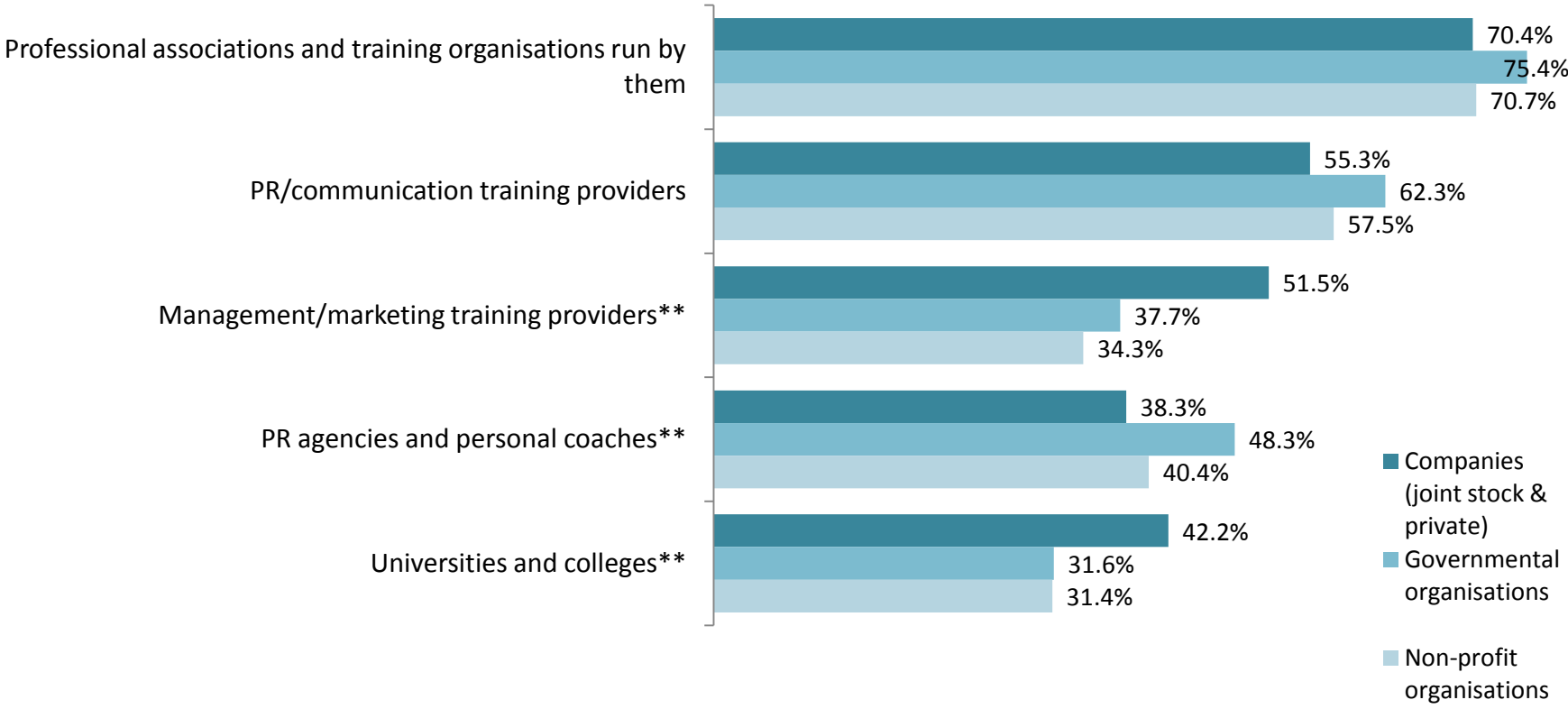
Sources of professional development used by communication professionals

Training providers that have been used within the last five years



Professionals working in companies are more interested in management courses and personnel development backed by academic standards

Training providers that have been used within the last five years



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 1,712 PR professionals working in communication departments. Q 18: Which of the following sources of personal professional training and development (seminars, workshops, online-courses, study programs etc.) have you used in the past five years while working? ** Highly significant differences (chi-square test, p ≤ 0.01).



Management, business and communication qualifications

Chapter overview

The survey reveals significant gaps between the development needs of communication professionals in Europe and the training opportunities currently offered by their organisations. The only field in which supply meets demand are traditional communication skills, i.e. written, oral and message production. The largest gap (almost 31%) is in management knowledge (current affairs, social and political trends, legal, ethical). This is particularly important as this is exactly the type of knowledge delivered at universities which communicators and their employers use the least for their development, as shown in the last chapter. Major gaps also exist in business knowledge (markets, products, competitors) and management skills (decision making, planning, organising, leading) with 22% each. Interestingly, these are also the three areas where most participants report a need for personal development. The areas are consistently top rated even among practitioners with more than ten years of experience on the job – which indicates that on-the-job training is simply not enough, although for the majority of management capabilities mileage counts.

As expected, needs for development are the strongest in Eastern and Southern Europe, in particularly for management skills, management and business knowledge. Perceived need for education and training is consistently the strongest in joint stock companies, except for communication skills where government communicators take the lead.

When reporting about their management skills in detail, communication professionals across Europe feel relatively competent in planning activities, managing relationships and information, as well as strategic positioning and leadership (values 3.89 to 3.81 on a scale ranging from 1 – very low to 5 – very high). From such a self-perception it is understandable that they rate learning on the job as being the most effective way for gaining management capabilities relevant for communication professionals (86%), followed by attending in-house or external business/management courses while in employment (67%). However, less prevalent capabilities like establishing structures and processes, managing financial resources and controlling are usually not part of these approaches to further development. Those aspects might be trained when taking an MBA after some years of work experience or completing a university education in communication management before starting the first job, two options which are favoured by 59% and 44% of the respondents. Studying business administration before starting the job is an option recommended by only one third of the professionals.

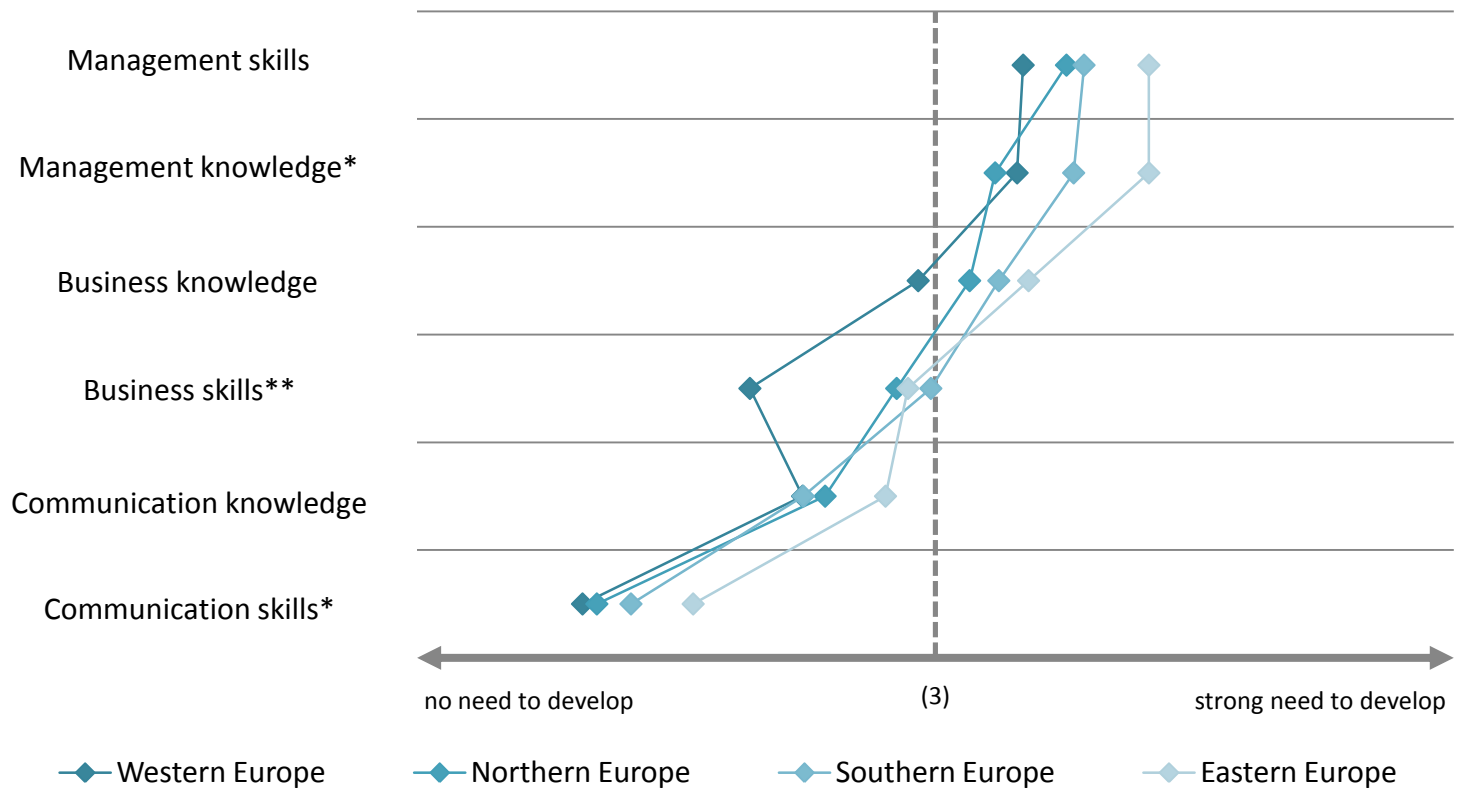
However, there are significant differences between countries regarding the support for different education measure. The United Kingdom values any kind of academic education in communication or management the least. Spain rates an academic education in communication and Serbia an academic education in management higher than any other countries. In general, it can be concluded that academic education and expectations of communication professionals regarding management, business and communication qualifications are not matched and that this is a serious problem for both sides to address: i.e. for academia to (re)claim relevance and professionals to get access to the type of knowledge they need.

Relevance of competency fields for communication professionals

Skills and knowledge	... need to be developed	...training offered / facilitated in own organisation	Gap between need and offering
Management skills (decision making, planning, organising, leading, human resources, self management)	45.8%	23.7%	-22.1%
Management knowledge (current affairs, social and political trends, legal, ethical)	42.2%	11.7%	-30.6%
Business knowledge (markets, products, competitors)	38.5%	16.2%	-22.3%
Business skills (dealing with budgets, invoices, contracts, taxation)	32.8%	17.0%	-15.8%
Communication knowledge (theory and principles, e. g. audiences, program development, campaigning, evaluation etc.)	27.4%	10.6%	-16.7%
Communication skills (written, oral, message production)	18.6%	19.4%	+1.4%

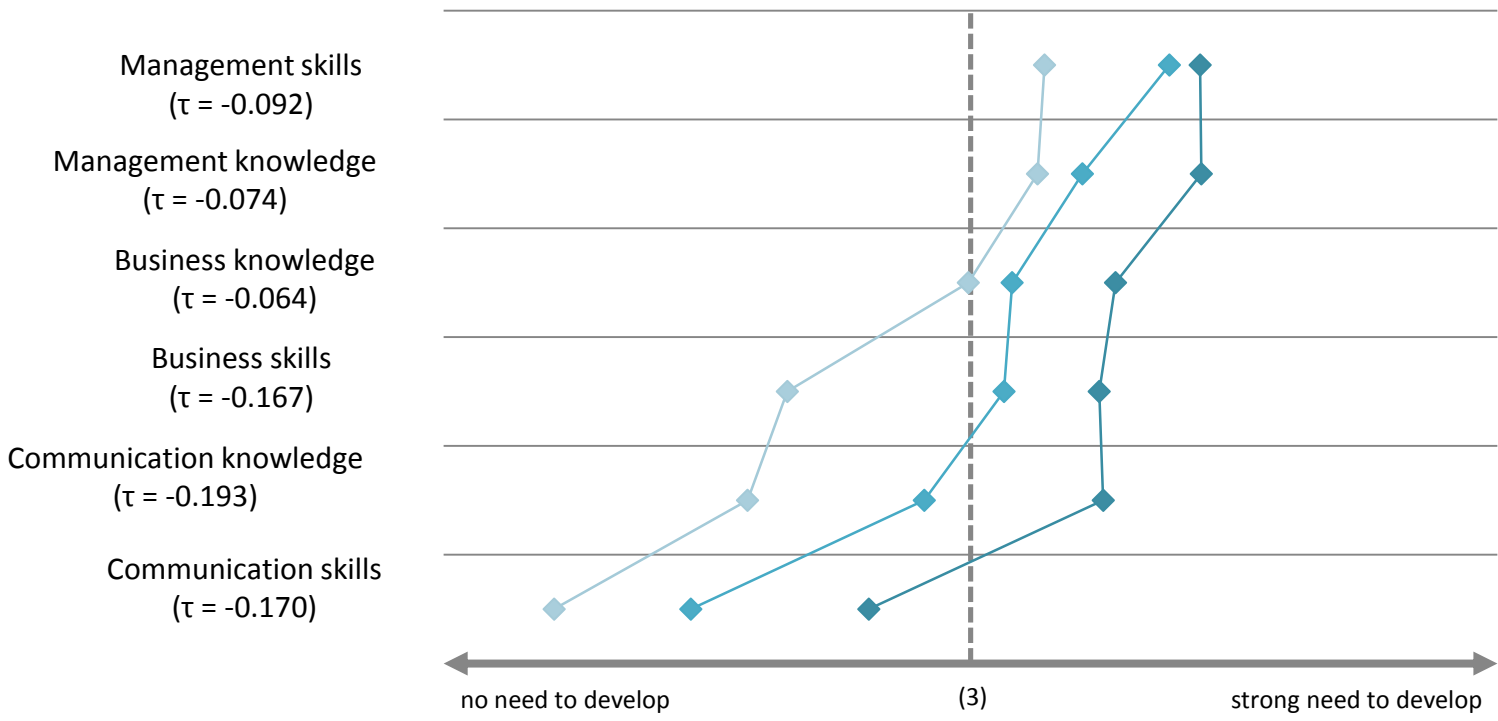
www.communicationmonitor.eu / Zerfass et al. 2012 / n^{min} = 1,673 PR professionals working in communication departments. Q 20: Thinking of yourself, your current capabilities and your future development, which of the following skills and knowledge areas do you believe are in need of developing? Does your organisation already offer training programmes in these fields? Scale 1 (no need to develop) – 5 (strong need to develop). Considered scale points 4-5.

Development needs in different European regions



www.communicationmonitor.eu / Zeffass et al. 2012 / n^{min} = 1,673 PR professionals working in communication departments. Q 20. Scale 1 (no need to develop) – 5 (strong need to develop). Mean values. * Significant differences (chi-square test, p ≤ 0.05). ** Highly significant differences (chi-square test, p ≤ 0.01)

Management skills are consistently the top priority for practitioners – even if they have been working on the job for more than ten years

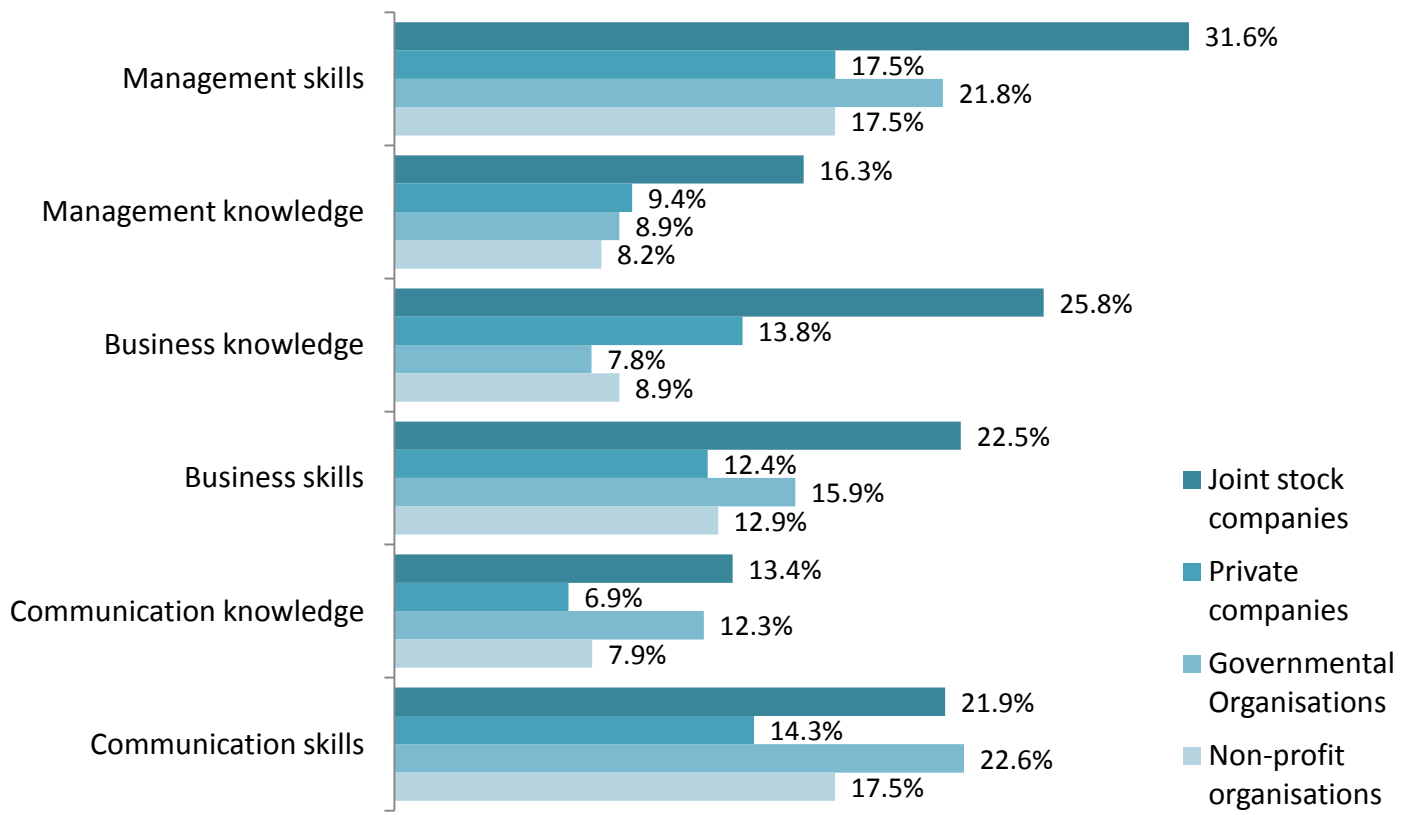


◆ Less than 5 years experience on the job ◆ 6 to 10 years experience on the job ◆ More than 10 years experience on the job

www.communicationmonitor.eu / Zerfass et al. 2012 / n min = 1,673 PR professionals working in communication departments. Q 20. Scale 1 (no need to develop) – 5 (strong need to develop). Considered scale points 4-5. Highly significant differences for all items (Kendall tau rank correlations, $p \leq 0.01$).

Skills development: Private companies and non-profit organisations seldom offer training for communication professionals

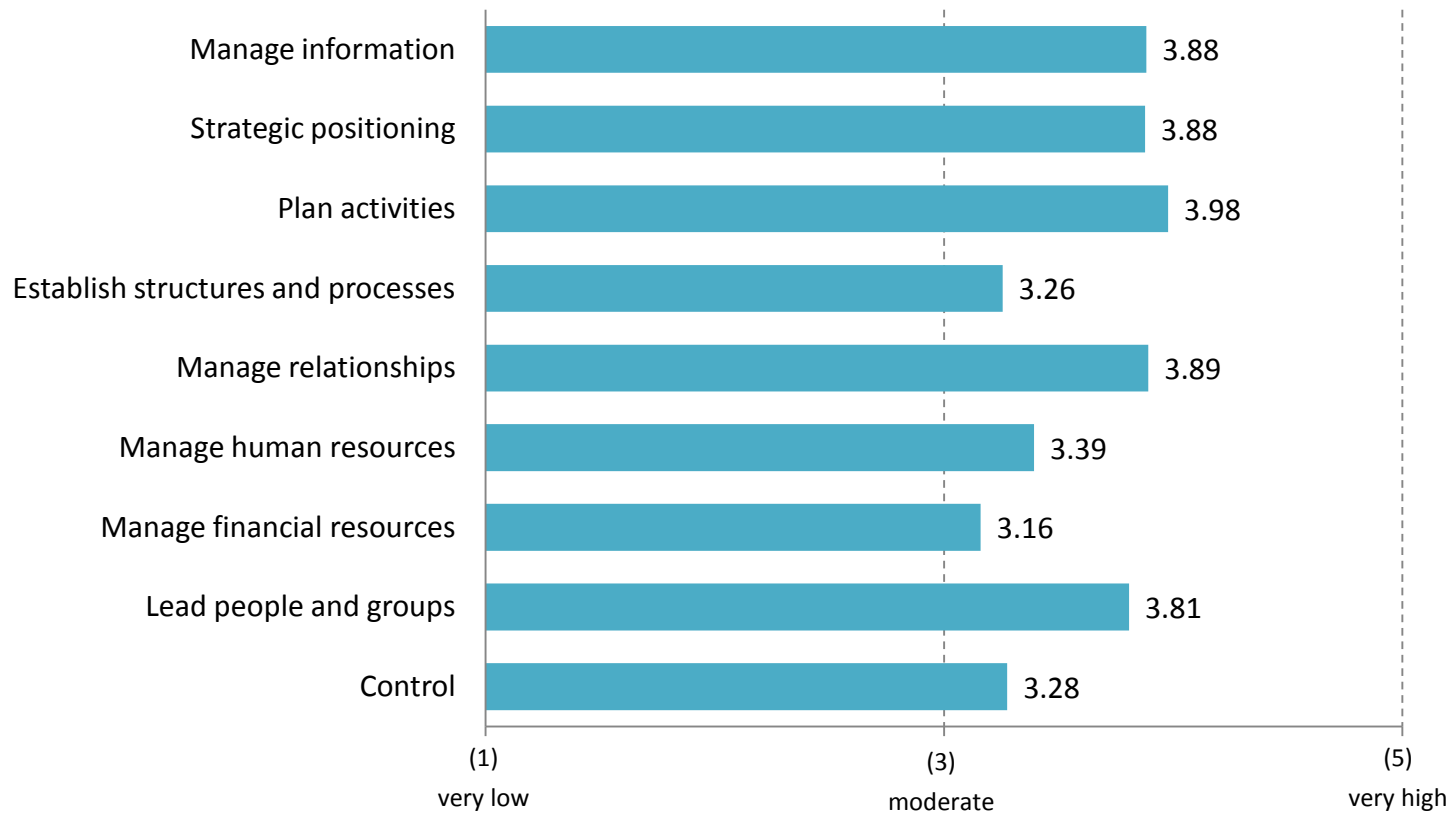
Training offered / facilitated by organisations for



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,140 PR professionals. Q 20: Thinking of yourself, your current capabilities and your future development, which of the following skills and knowledge areas do you believe are in need of developing? Does your organisation already offer training programmes in these fields? Highly significant differences for all items (chi-square test, p ≤ 0.01).

Management skills: Practitioners are self-confident in the fields of analysing, planning and leadership; but less in terms of finances, organisation and control

Self-assessment of management capabilities

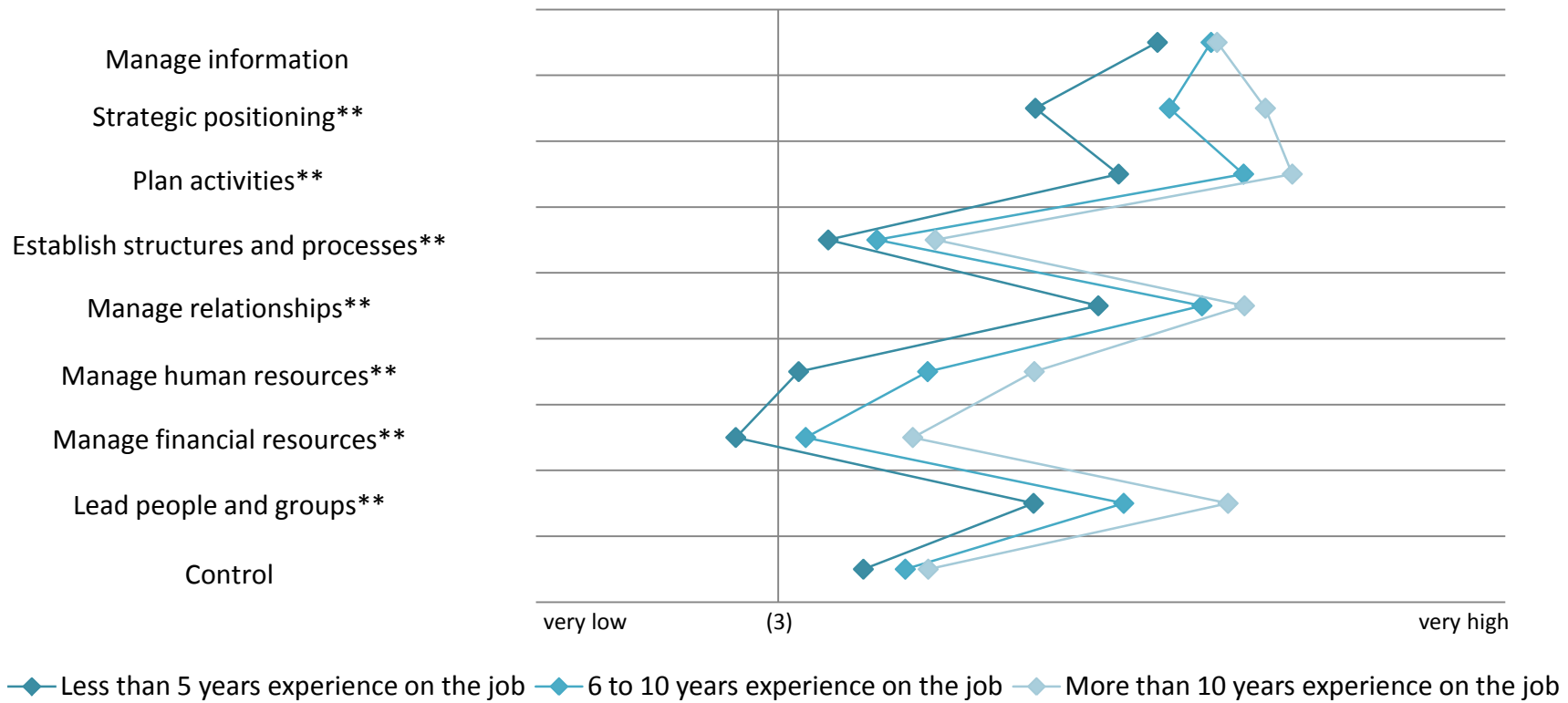


Percentage of professionals in various fields of practice reporting high capabilities

Professionals working in the field of ...	Manage Information	Strategic positioning	Plan activities	Establish structures and processes	Manage relationships	Manage human resources	Manage financial resources	Lead people and groups	Control
Media relations, press spokesperson	73.9%	67.9%	68.8%	31.8%	67.7%	43.2%	33.5%	61.1%	40.0%
Online communication, social media	69.6%	66.2%	74.3%	41.2%	69.6%	41.2%	25.7%	61.5%	43.9%
Internal communication, change	76.2%	74.6%	73.8%	39.2%	65.4%	50.0%	37.7%	67.7%	36.9%
Overall communication	72.9%	71.0%	76.8%	40.5%	72.7%	47.2%	35.8%	68.0%	38.5%
International communication	65.8%	65.8%	73.8%	43.1%	67.1%	42.7%	29.3%	60.0%	35.6%
Marketing, brand, consumer communication	67.9%	70.1%	77.1%	38.4%	67.5%	45.4%	48.0%	66.8%	42.8%
Governmental relations, public affairs, lobbying	74.8%	74.8%	69.2%	42.7%	72.0%	53.8%	38.5%	67.8%	42.0%
Consultancy, advising, coaching, key account	78.1%	80.7%	81.6%	47.4%	70.2%	51.8%	36.8%	71.1%	40.4%
Strategy and coordination of the communication function	75.6%	84.6%	81.5%	48.5%	76.8%	54.1%	42.9%	79.8%	44.8%

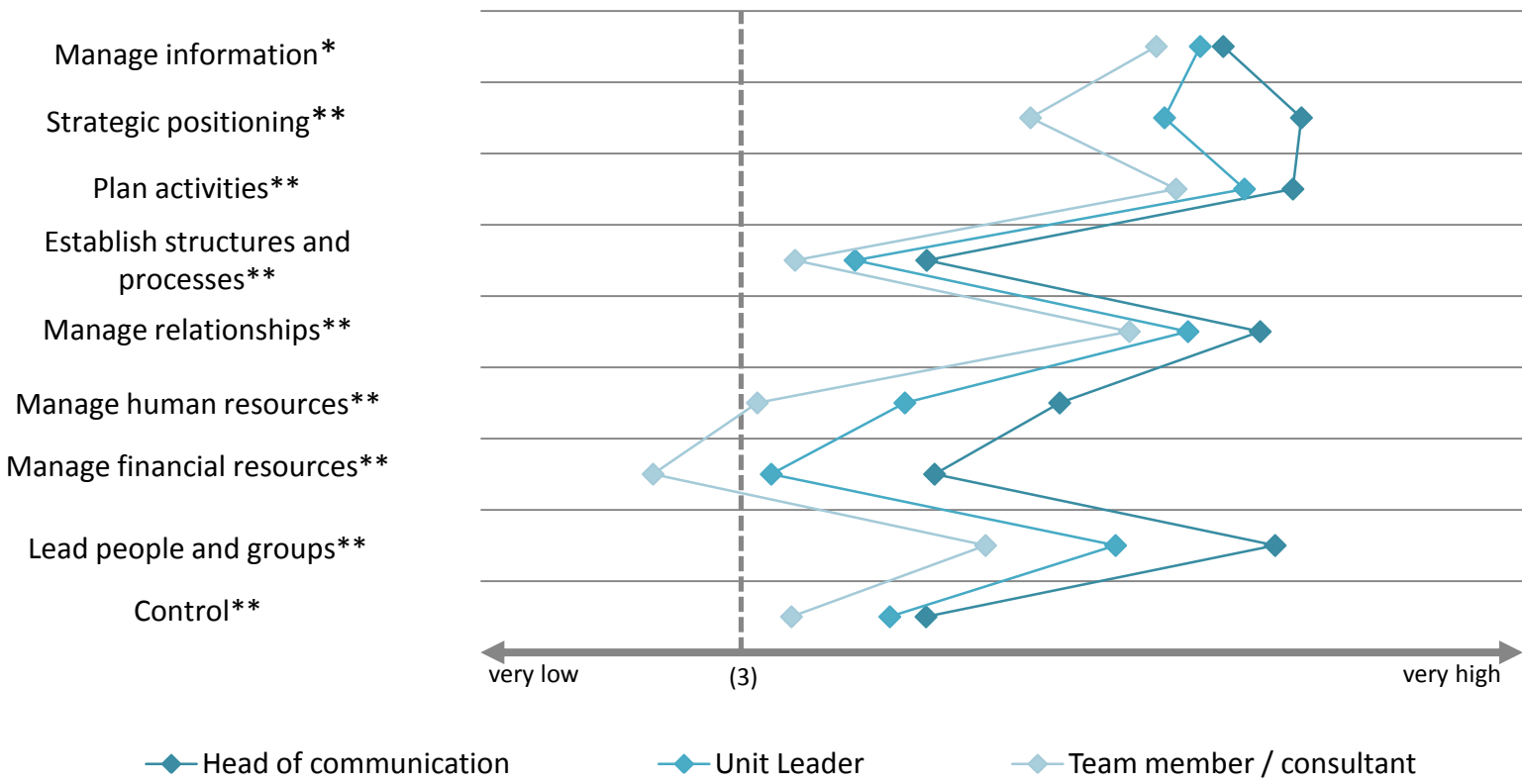
Professionals with longer job experience report significantly better management skills, but not for information management and control

Self-assessment of management capabilities, depending on job experience



Heads of communication feel more competent in strategic positioning, leadership, managing human and financial resources

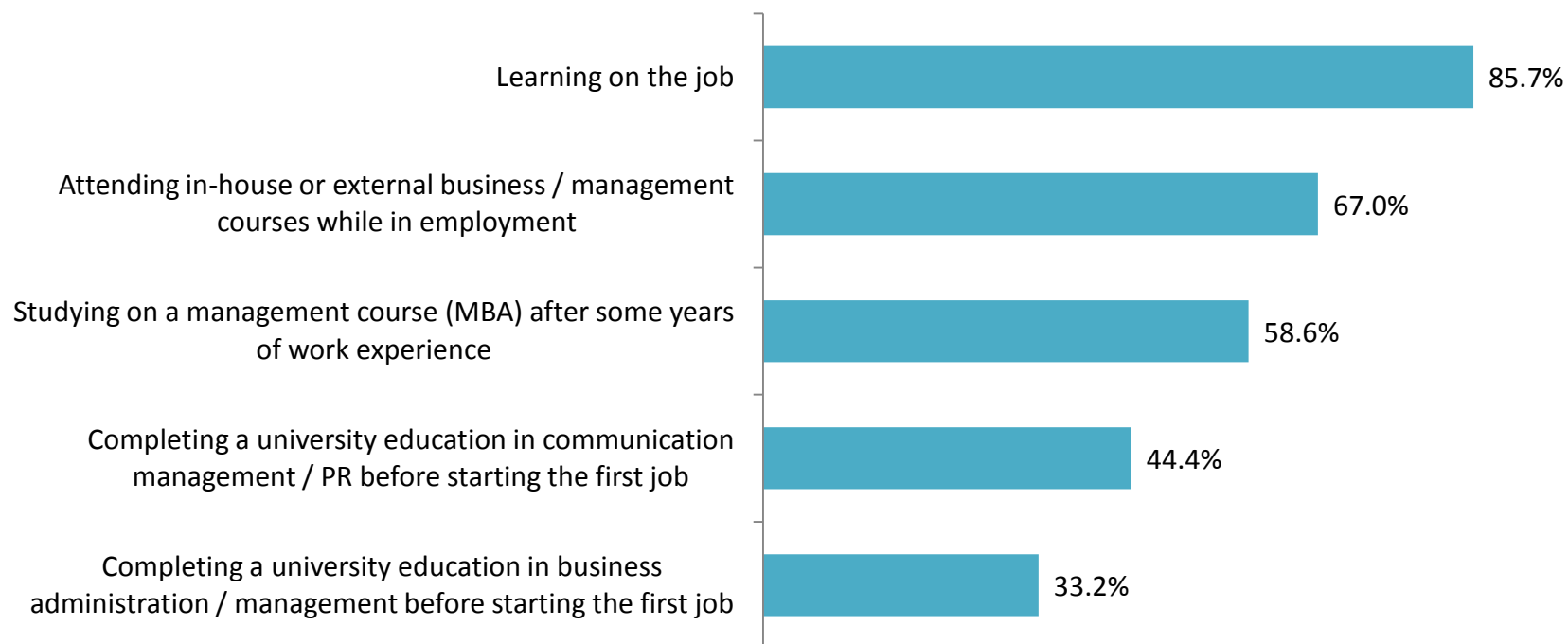
Self-assessment of management capabilities at different levels of hierarchy



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,185 PR professionals; Q 21: How would you rate your capabilities in the following areas? Scale 1-5. * Significant differences (Kendall tau rank correlations, p ≤ 0.05). **Highly significant differences (Kendall tau rank correlations, p ≤ 0.01).

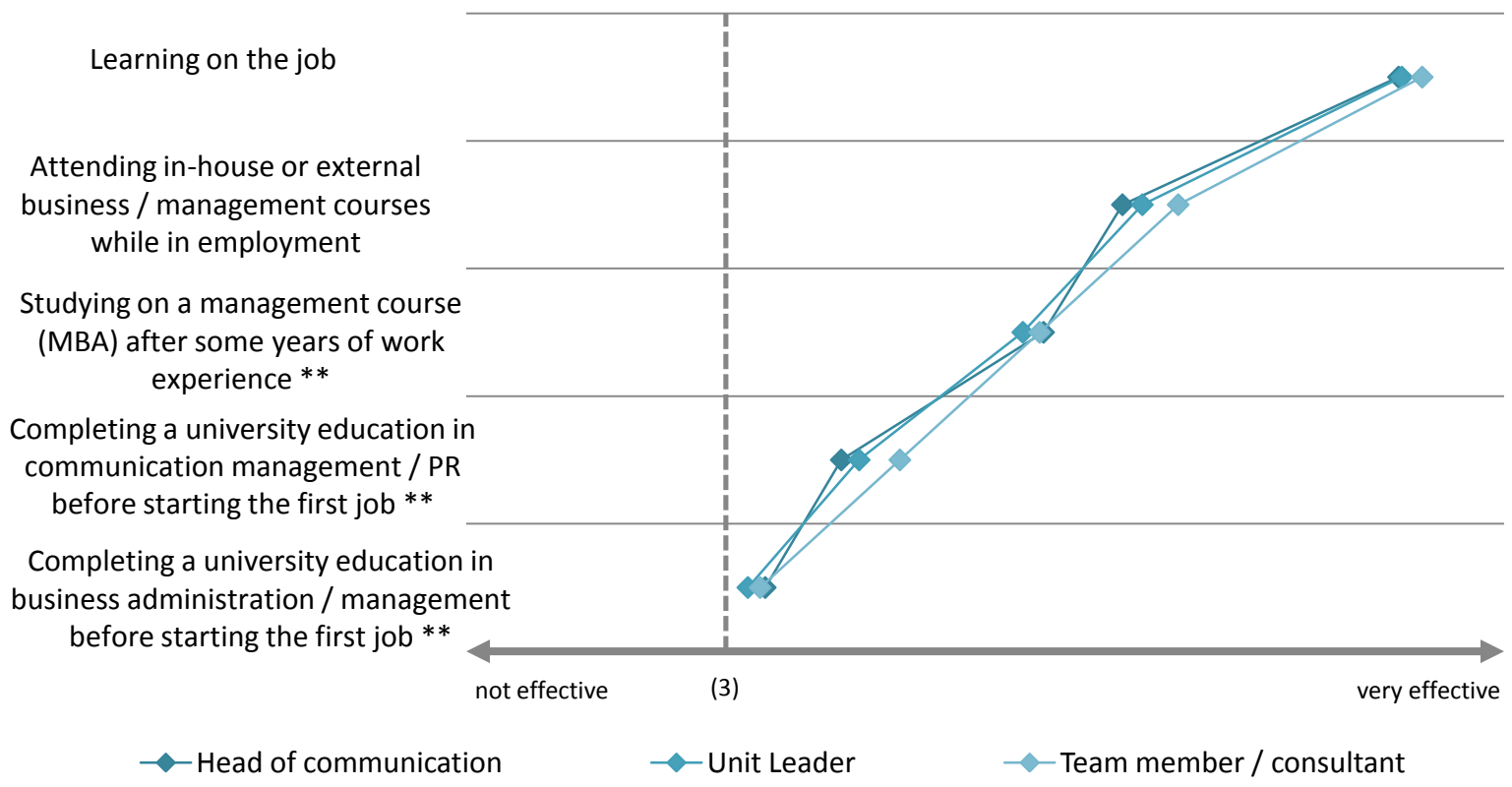
Training and development measures for enhancing management capabilities

Effectiveness of measures to acquire business and management capabilities



Learning on the job is preferred by professionals on all hierachical levels

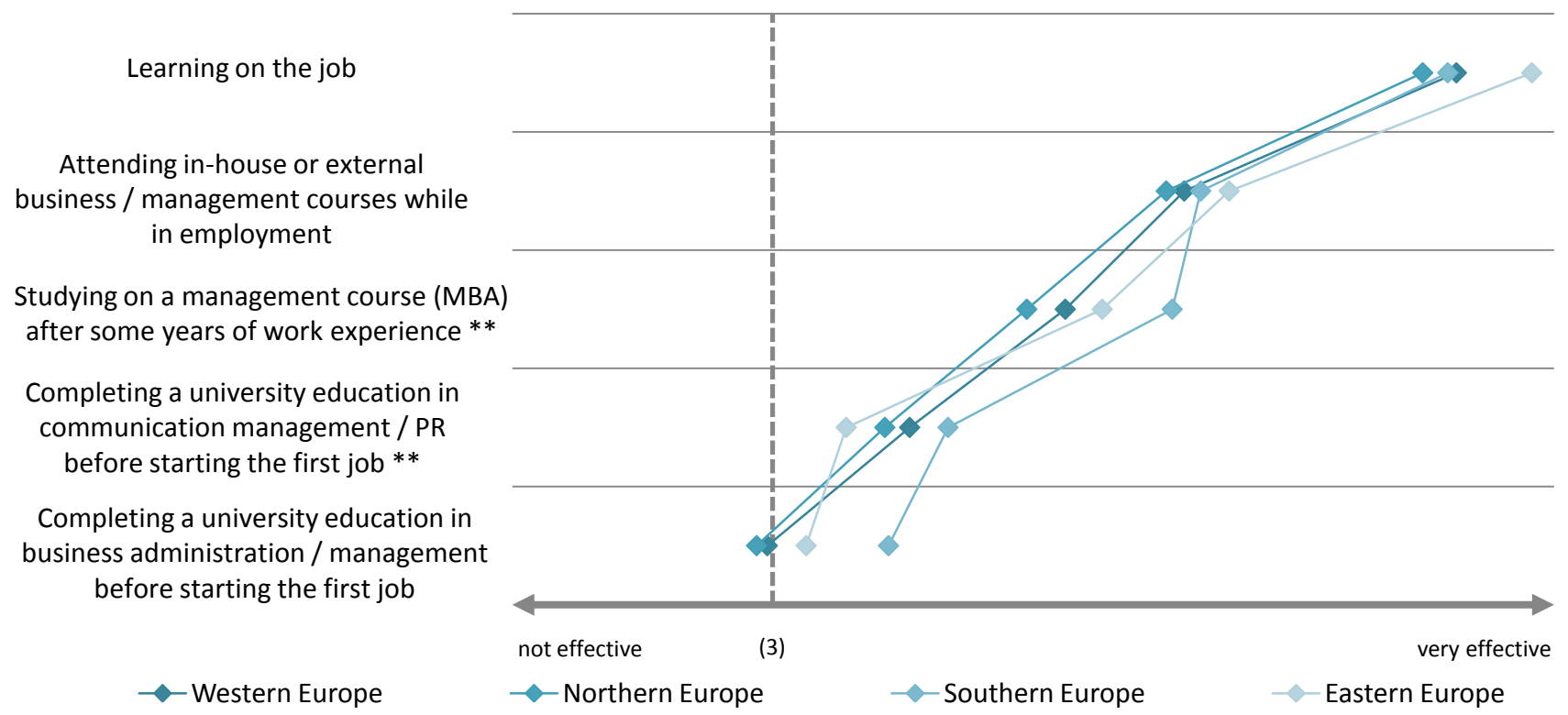
Effectiveness of measures to acquire business and management capabilities



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,185 PR professionals. Q 21: How effective do you rate the following education and training measures to acquire business and management capabilities relevant for communication professionals? ** Highly significant differences (Kendall tau rank correlations, p ≤ 0.01).

Regional breakdown: Academic education is more highly valued in Southern Europe

Effectiveness of measures to acquire business and management capabilities



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,185 PR professionals. Q 21: How effective do you rate the following education and training measures to acquire business and management capabilities relevant for communication professionals? ** Highly significant differences (chi-square test, p ≤ 0.01).

Country-by-country analysis of preferred training and education measures

	Learning on the job	Attending in-house or external business / management courses while in employment	Studying on a management course (MBA) after some years of work experience *	Completing a university education in communication management/ PR before starting the first job *	Completing a university education in business administration / management before starting the first job *
Belgium	4.46	3.96	3.40	3.11	2.87
Finland	4.39	3.92	3.67	3.39	3.16
France	4.29	3.75	3.77	3.14	2.81
Germany	4.28	3.78	3.41	3.34	3.16
Italy	4.20	3.64	3.57	3.17	3.03
Netherlands	4.33	1.80	3.61	3.31	2.91
Norway	4.02	3.59	3.82	3.71	3.20
Serbia	4.48	3.85	3.74	3.29	3.37
Spain	4.25	3.85	3.85	4.45	3.21
Sweden	4.10	4.38	2.56	3.42	2.95
Switzerland	4.33	3.73	3.52	3.19	2.87
United Kingdom	4.38	3.79	3.13	2.65	2.64

www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,185 PR professionals. Q 22: How effective do you rate the following education and training measures to acquire business and management capabilities relevant for communication professionals? Scale 1 (not effective) – 5 (very effective). Median values. * Significant differences between countries (ANOVA test, $p \leq 0.01$).



Recruiting young professionals

Chapter overview

Strategic communication is clearly a professionalising occupation: university level education in communication management or public relations has become the most important qualification when organisations recruit early career professionals. This criterion was named by 59% of the professionals surveyed as one of the top three attributes to consider. The next important qualifications in descending order are knowledge of the English language (52%), internships or on the job training (45%), professional qualification in public relations or communication as trained by associations and training institutes (43%), university education in any or another subject (29%) and international experience (28%). Less sought for are business and management qualifications, extra languages and a university education in business administration. University education in communication management is the most important in governmental organisations and non-profit organisations, while consultancies rate internships a bit more highly and companies consider fluent English as important as studying communication management.

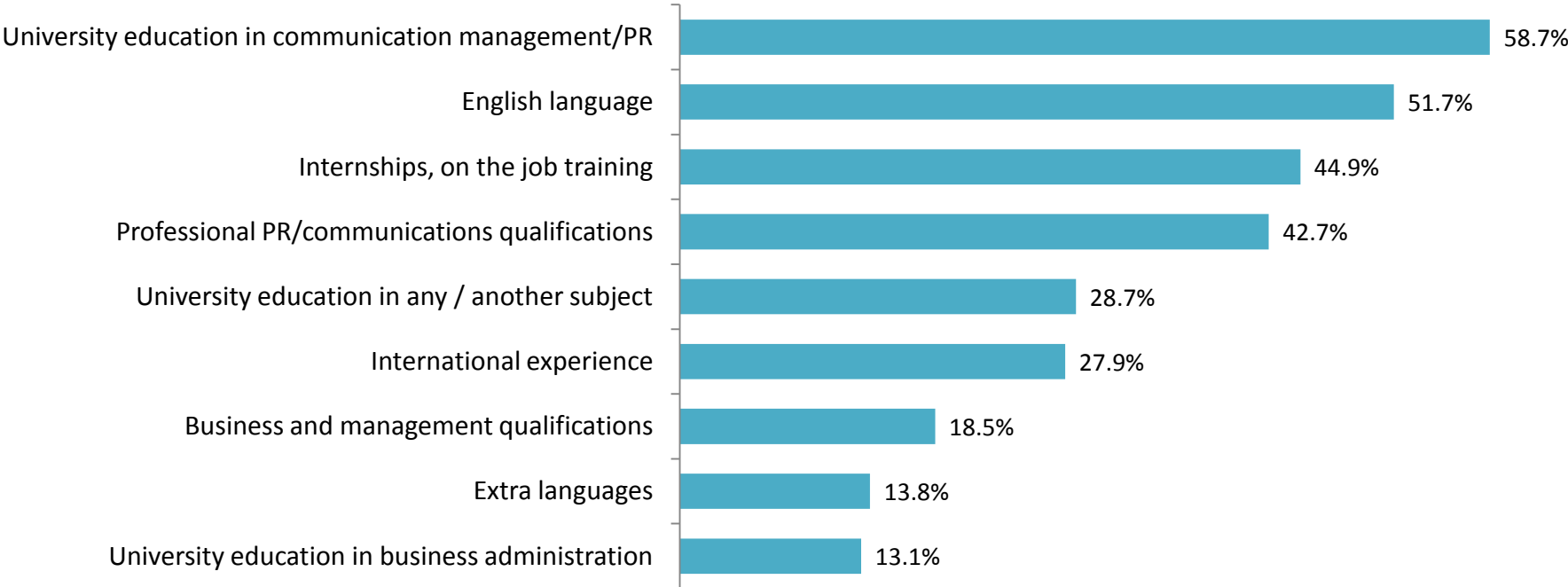
University education is most valued in Southern Europe (62%), followed by Northern Europe (59%), Western Europe (56%) and Eastern Europe (56%). There are interesting differences in selection processes for young professionals between different countries. In the United Kingdom, university education in public relations is rated only half as important as the European average (30% versus 59%). On the contrary, university level education in the field is highly valued in Norway (79%), Spain (77%), Sweden (74%) and the Netherlands (73%).

English language proficiency in the UK is more than twice as important than a university education in public relations. Indeed, in the UK university education in any subject is much more important than in public relations. Even internships and on the job training are rated more important by British respondents. These results contradict national UK employment statistics for public relations graduates and their demand in the workplace. Therefore there are several possible explanations for such a situation: public relations may be perceived in the UK as not having any disciplinary foundation and studying it at the university level is a waste of time. Another possibility is that practitioners in the UK continue to prefer generic graduates open to on the job training, or they are not satisfied with ways and places in which public relations is taught on the island.

Practitioners in Germany and Switzerland are also below the average in valuing university education in communication management and place the highest importance on internships and on the job training, probably reflecting a deep respect towards vocational education in these countries. Professional communication qualifications in PR are most valued in the Netherlands (57%) and international experience in Italy (44%). These differences in preferences reveal differences in educational and occupational traditions and present a great challenge to attempts for a greater mobility in occupations across Europe – here in the case of strategic communication.

Employers prefer young professionals with a dedicated academic education in communication management

Most important qualifications when recruiting early career professionals

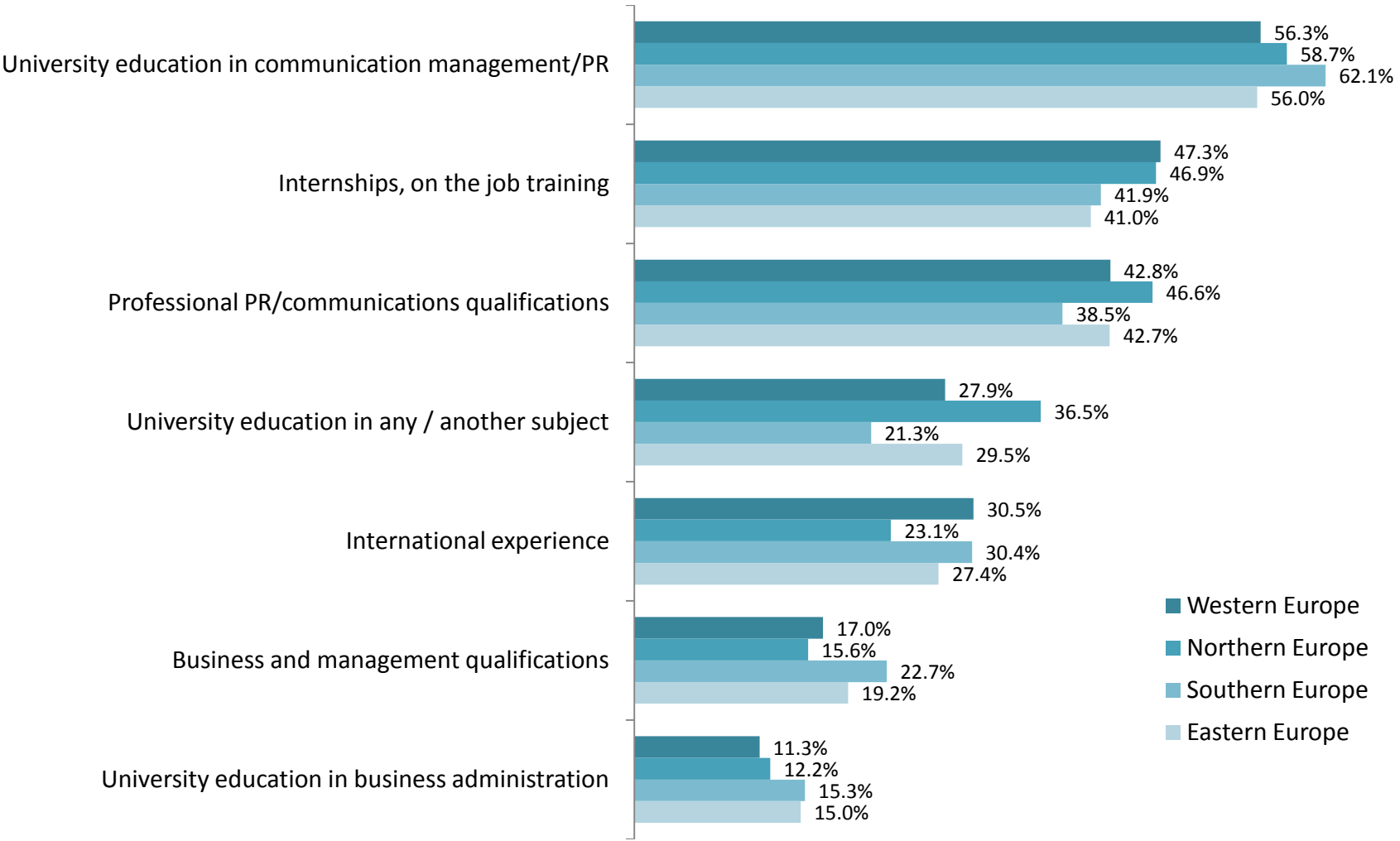


www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,185 PR professionals. Q 23: Which of the following education and training qualifications are most important for your organisation when recruiting early career PR / communication professionals? Please select the three most important items.

Companies focus on international aspects, while internships are quite important when agencies hire young practitioners

Important qualifications:	Companies (joint stock & private)	Governmental organisations	Non-profit organisations	Consultancies and agencies
University education in communication management / PR	57.8%	68.2%	58.2%	53.5%
English language	58.0%	34.0%	55.0%	48.8%
Internships on the job training	40.4%	44.4%	46.1%	55.0%
Professional PR / communication qualifications	40.3%	54.2%	48.2%	35.9%
University education in any / another subject	24.0%	33.0%	34.6%	32.6%
International experience	30.5%	25.4%	22.5%	26.8%
Extra languages	15.0%	12.6%	14.6%	12.5%
University education in business administration	15.1%	11.5%	6.8%	13.7%

Qualifications are valued differently in European regions



www.communicationmonitor.eu / Zerfass et al. 2012 / n = 2,185 PR professionals. Q 23: Which of the following education and training qualifications are most important for your organisation when recruiting early career PR / communication professionals? Please select the three most important items.

Country-by-country analysis of selection processes for young professionals

Important qualifications:	University education (Comm./PR)	English language	Internships, on the job training	Professional PR / comm. qualification	University education in any subject	International experience	Business/ Management qualifications	Extra languages	University education (Business)
Belgium	45.6%	52.4%	47.6%	24.3%	27.2%	39.8%	16.5%	44.7%	1.9%
Finland	71.3%	55.2%	41.4%	37.9%	39.1%	20.7%	8.0%	17.2%	9.2%
France	58.9%	64.2%	49.5%	40.0%	15.8%	30.5%	14.7%	9.5%	1.8%
Germany	48.4%	51.6%	68.6%	33.3%	39.9%	30.1%	9.8%	4.6%	13.7%
Italy	52.1%	55.6%	39.6%	38.2%	20.8%	43.8%	18.1%	16.7%	15.3%
Netherlands	73.4%	39.2%	38.6%	57.0%	25.9%	24.1%	22.8%	7.6%	11.4%
Norway	79.3%	35.6%	36.8%	44.8%	37.9%	25.3%	18.4%	2.3%	19.5%
Serbia	52.9%	53.6%	45.7%	48.6%	26.8%	24.6%	24.6%	9.4%	13.8%
Spain	77.0%	57.9%	42.1%	27.0%	13.5%	27.8%	23.0%	15.9%	15.9%
Sweden	73.9%	35.7%	46.1%	48.7%	25.2%	27.8%	20.0%	7.8%	14.8%
Switzerland	50.0%	41.1%	32.2%	52.2%	26.7%	31.1%	21.1%	36.7%	8.9%
United Kingdom	30.0%	67.6%	56.3%	44.6%	49.8%	19.7%	12.7%	11.3%	8.0%



Salaries

Chapter overview

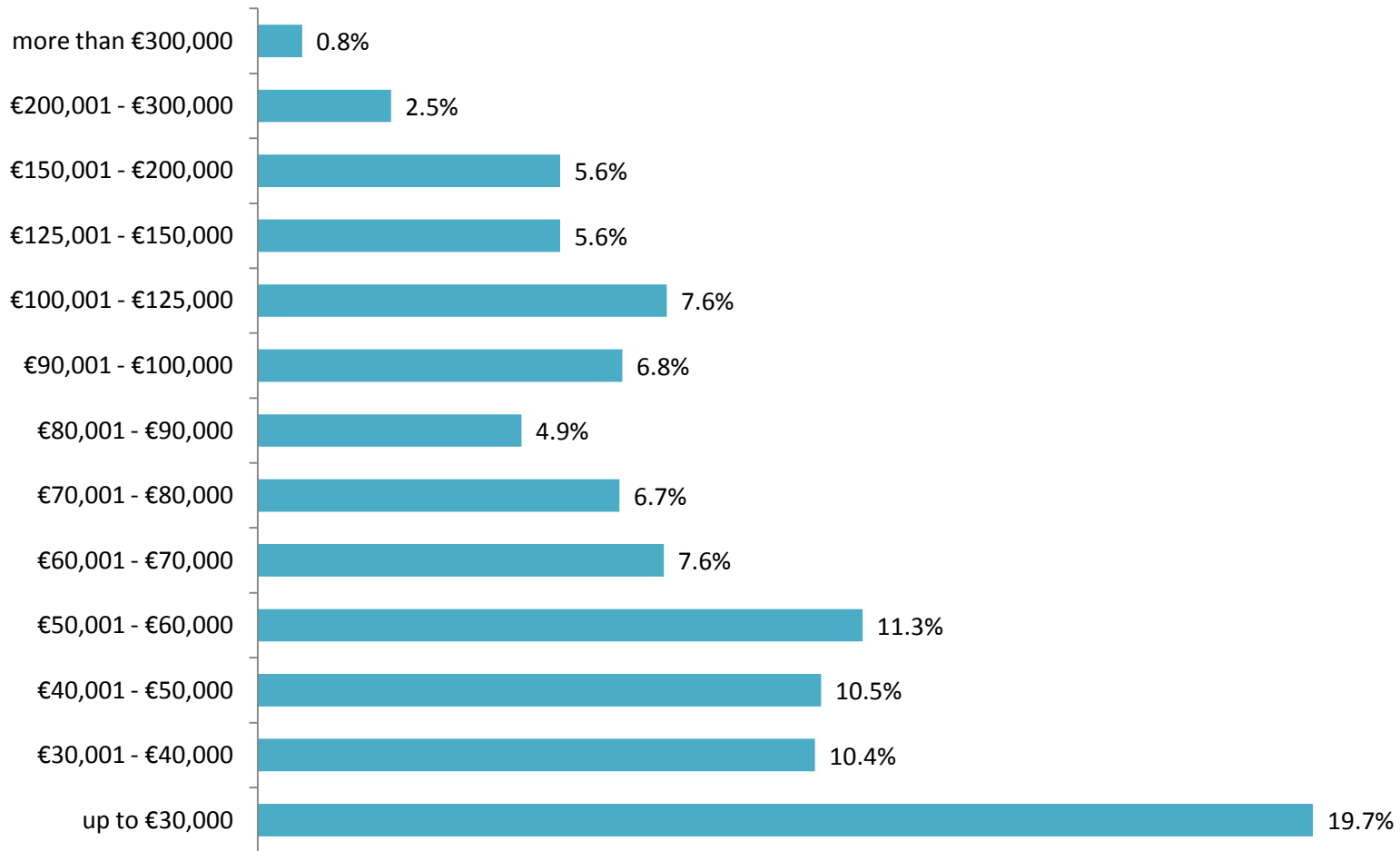
Remuneration is an interesting area that the European Communication Monitor is monitoring closely. But it is important to notice that changes between years are the result of differences in the job market as well as differences in the composition of respondents in the annual samples. In 2012, less than 1% of the communication professionals interviewed earn more than €300,000 per year. On the other hand, there are almost 20% of professionals who do not earn more than €30,000 per year. The top tier was larger in both 2010 (1.3%) and 2011 (2.1%). But if we take into comparison professionals earning more than €200,000, there is an oscillation from 5.1% in 2009 to 3.3% in 2010, from there to 5% in 2011, to 3.3% in 2012. For heads of communication and agency CEOs the percentage of top earners developed from 8.2% in 2009 to 5.9% in 2010, from there to 8.6% in 2011, and to 6.3% in 2012.

Two years ago the ECM noted a drop in the highest earning group (Zerfass et al., 2010) which was partly explained as a result of the changing composition of communication professionals participating in the survey – with an increasing number of returned questionnaires coming in from Southern and Eastern Europe. Last year the researchers noticed that a part of the declining trend was a consequence of the general economic downturn in Europe, but were happy to note that the downward trend has stopped and that there was an upswing (Zerfass et al., 2011). As it seemed that the general economic optimism was returning to Europe last year, so the salaries in communication seemed to grow. With a new pessimism returning to the European continent in 2012, salaries in communication are following the general economic trend.

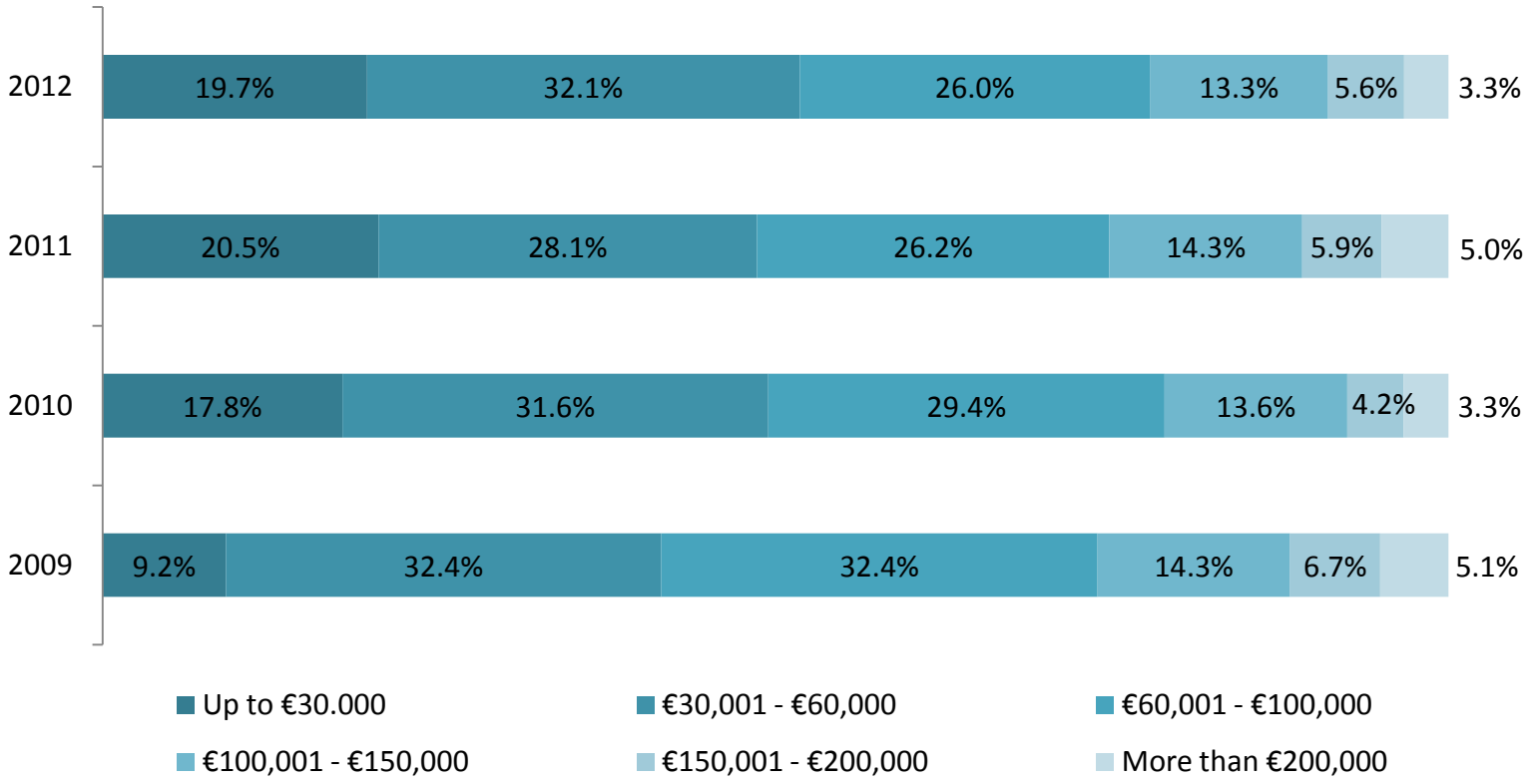
Very telling are differences between different types of organisations and regions. If one wants to earn more than €300,000 per year, the business sector is the only way to do it (in companies and agencies). Governmental and non-profit organisations are less generous, although professionals working there appear in the second category from the top in the range from €200,001 to €300,000 per year. While consultancies and agencies are offering also the top salaries, they are also the largest provider of the lowest salaries that go up to €30,000 per year.

There is consistent disparity in earnings between different parts of Europe that is stable through the years. This is the most evident in the lowest paid group, earning up to €30,000 per year. Practically all communication practitioners with this remuneration are located in Eastern and Southern Europe. They are also in the majority for the respondent group who earn up to €50,000 per year. From there on Western and Northern Europe take the lead. The situation is practically the same if only heads of communication and agency CEOs are observed: those in Southern and Eastern Europe are significantly more often in the lowest paid groups and those in Northern and Western Europe are doing best. Once again, the survey underlines that communication management in Europe has a strong identity, shared goals and values, but the profession also reflects the different levels of development in economic terms.

Basic annual salary of communication practitioners in Europe 2012

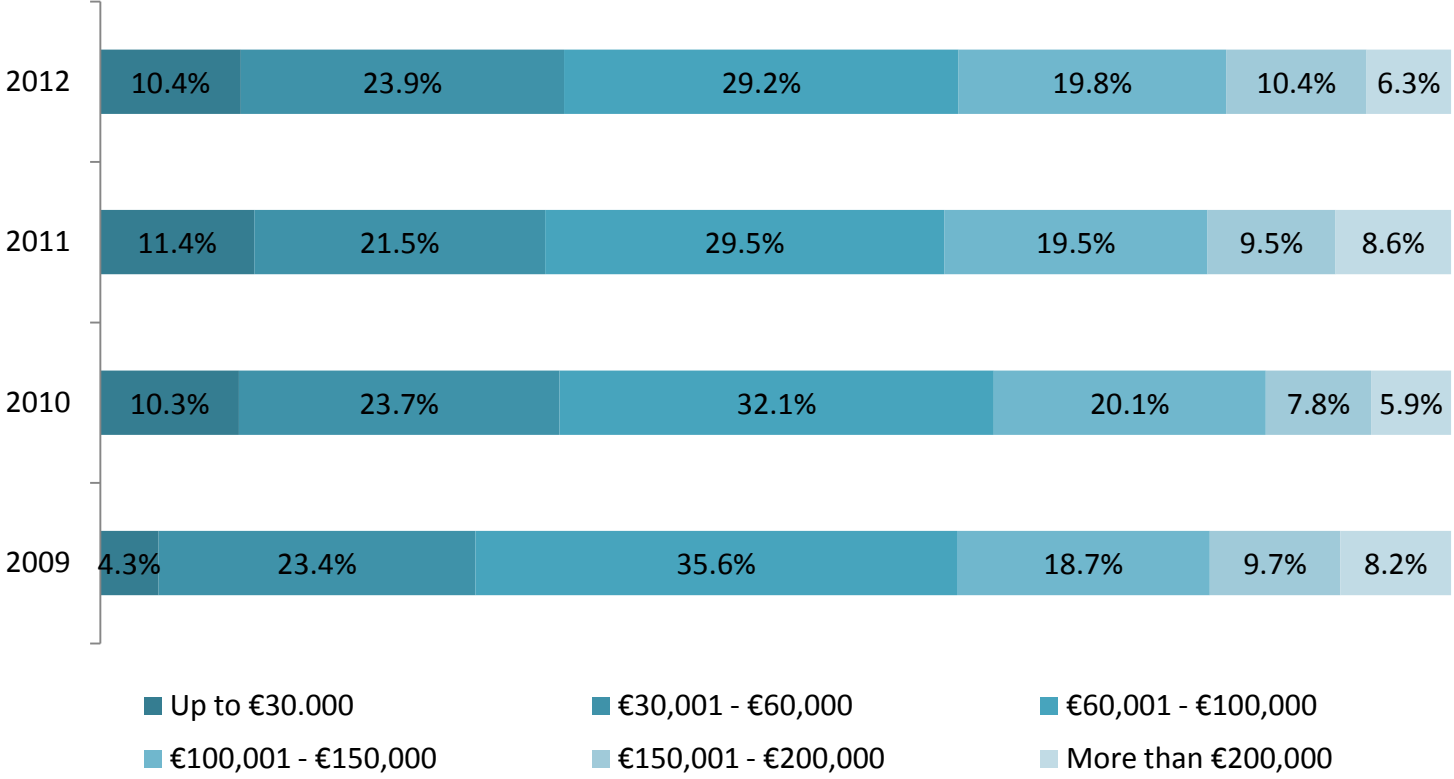


Development of salaries during the last years (all respondents)



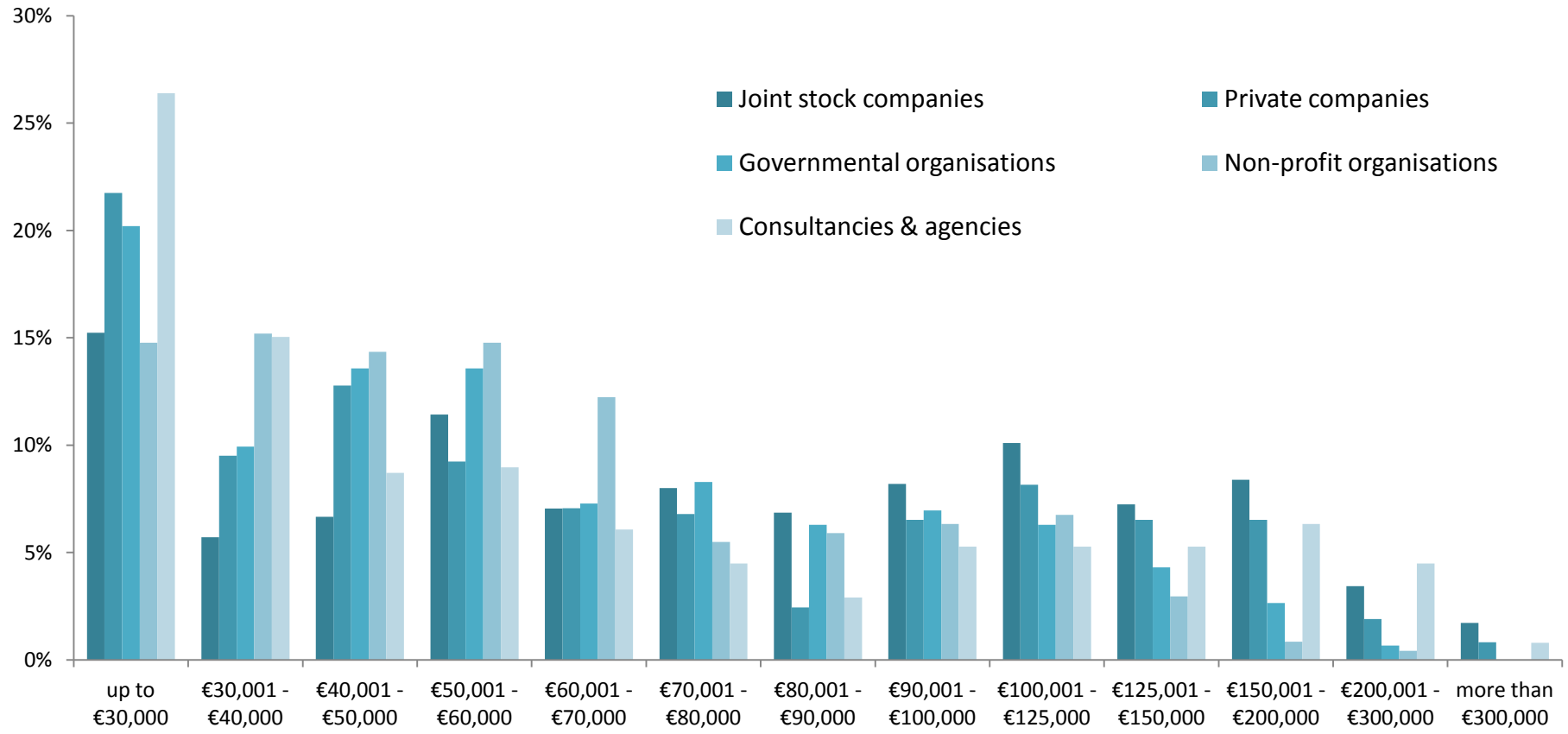
www.communicationmonitor.eu / Zerfass et al. 2012 / n = 1,811 PR professionals. Q 38: In which of the following bands does your basic annual salary fall? Zerfass et al. 2011 / n = 1,814 / Q 20; Zerfass et al. 2010 / n = 1,688 / Q 19; Zerfass et al. 2009 / n = 1,768 / Q 17.

Development of salaries for heads of communication and agency CEOs

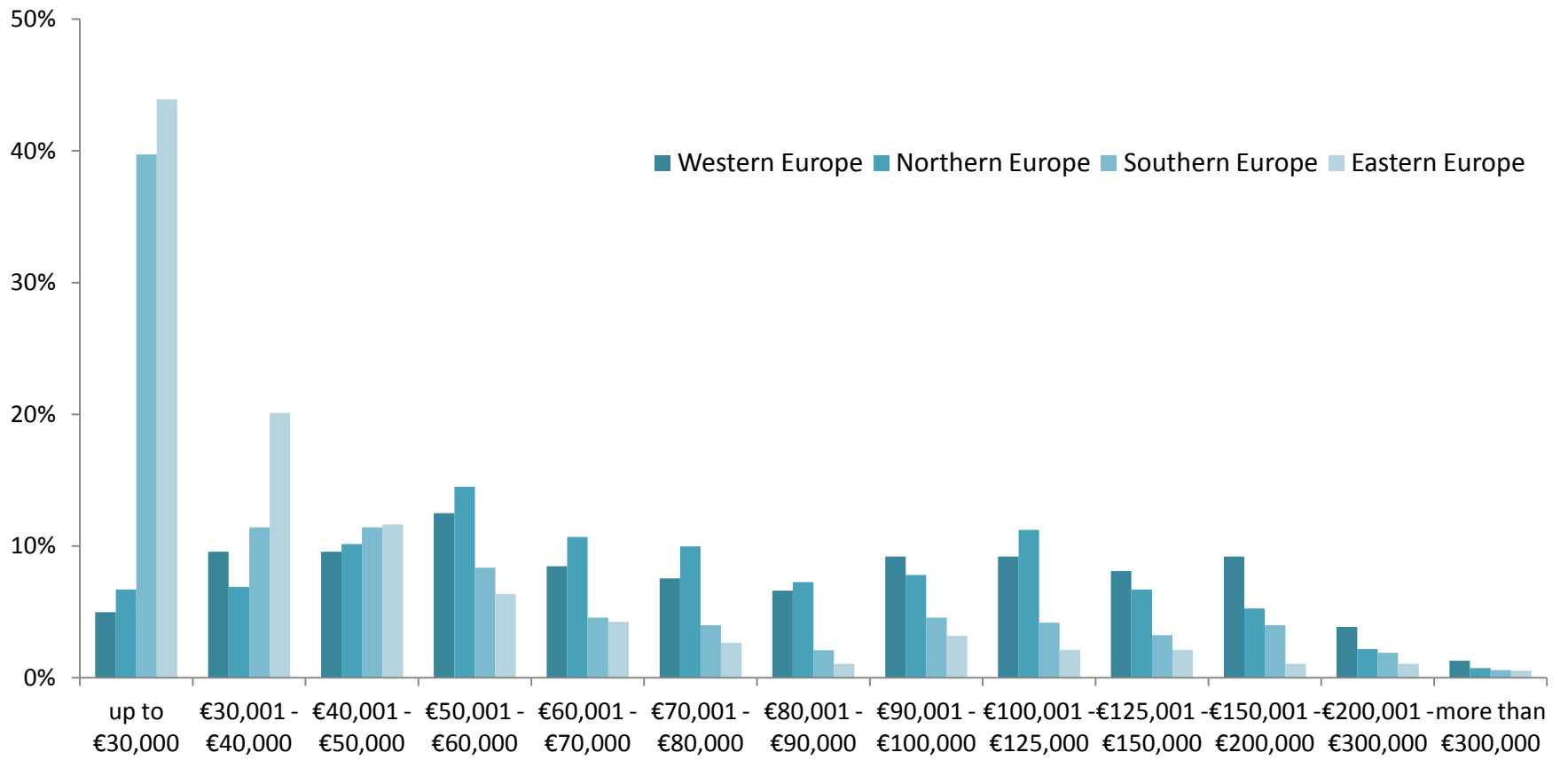


www.communicationmonitor.eu / Zerfass et al. 2012 / n = 798 PR professional. Q 38: In which of the following bands does your basic annual salary fall? / What is your position? Zerfass et al. 2011 / n = 887 / Q 20. Zerfass et al. 2010 / n = 809 / Q 19. Zerfass et al. 2009 / n = 915 / Q 17.

Annual average salary in different types of organisations



Annual salaries in different regions



Annual salaries for heads of communication and agency CEOs in different European regions





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Partners



European Public Relations Education and Research Association (EUPRERA)

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

www.euprera.org



European Association of Communication Directors (EACD)

The EACD is the leading network for communication professionals across Europe with more than 2,000 members. It brings in-house communication experts together to exchange ideas and discuss the latest trends in international 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

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