

EUROPEAN COMMUNICATION MONITOR 2014

EXCELLENCE IN STRATEGIC COMMUNICATION –
KEY ISSUES, LEADERSHIP, GENDER AND MOBILE MEDIA.
RESULTS OF A SURVEY IN 42 COUNTRIES.

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EUROPEAN COMMUNICATION MONITOR 2014

EXCELLENCE IN STRATEGIC COMMUNICATION – KEY ISSUES, LEADERSHIP,
GENDER AND MOBILE MEDIA. RESULTS OF A SURVEY IN 42 COUNTRIES.

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

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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Foreword



This year's edition of the European Communication Monitor presents a fascinatingly diverse picture of the European communications landscape.

The digital age causes dynamic developments in strategic communications. With 86 per cent, online communication is considered to be the top communication channel. Even though the novelty around social media is not perceived as being the most challenging issue anymore, communicators expect social media and mobile communication to become even more important communication instruments within the next three years. The most pressing issue for nearly half of the survey's respondents is the challenge of linking communication and business strategies. This is a challenge to which we at the European Association of Communication Directors (EACD) are fully committed and we work together with all of our members to bring this essential relationship between communication and business outcomes firmly into the foreground.

Of further interest are the messages around job satisfaction levels, which can best be described as a mixed picture: despite rating important considerations such as salary, work-life balance and opportunities lower than four years ago, most communicators state that they are satisfied with their jobs. This is because they place greater importance on such satisfaction-drivers such as interesting tasks, appreciation from superiors and (internal) clients and job status rather than on, for example, job security and work-life balance.

I invite you to explore this year's Monitor in depth over the following pages and I hope the findings of the report will stimulate a lively discussion among communicators. The EACD will take the results on board and use them as inspiration in our work for the advancement of our profession.

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



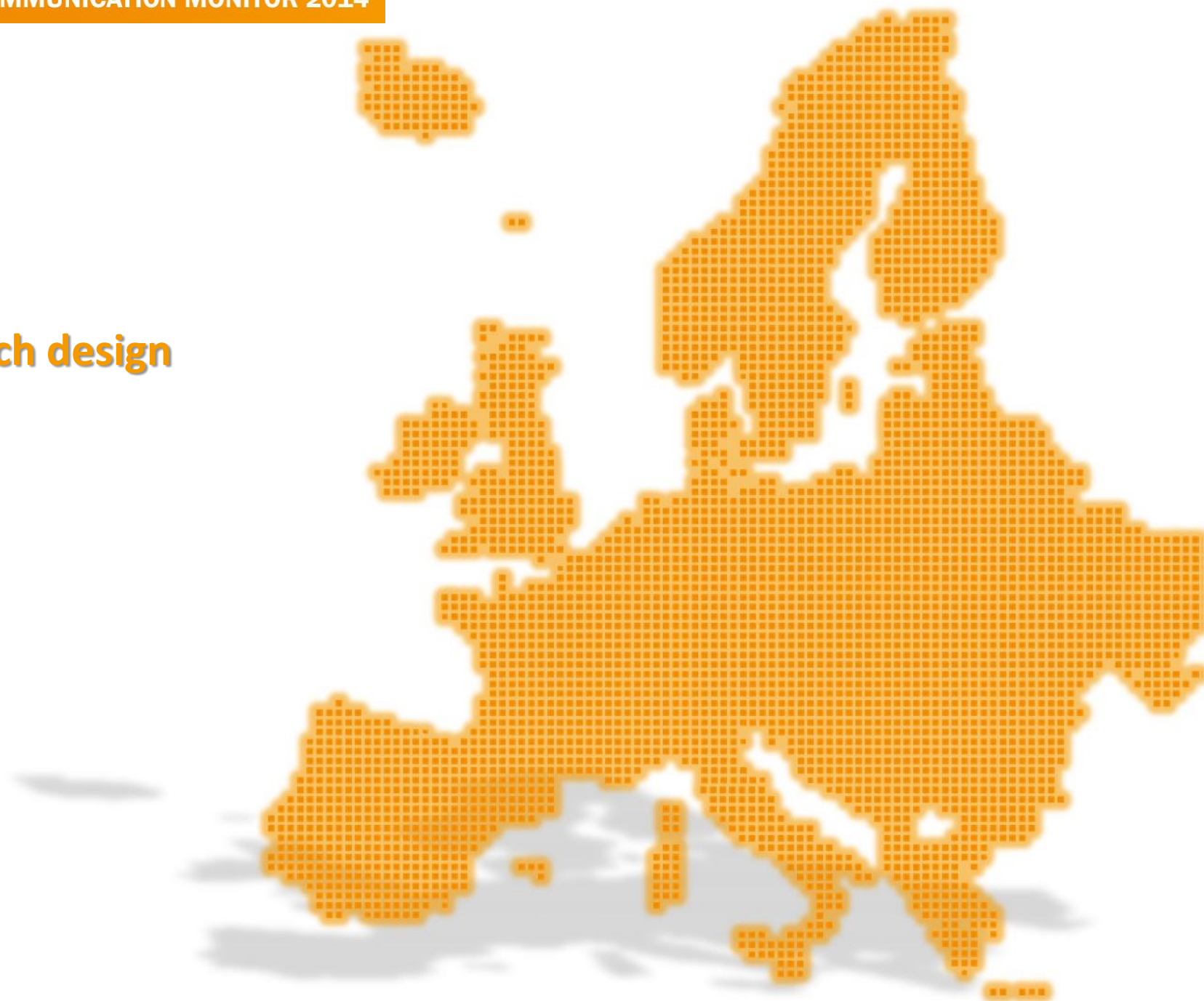
Reputation, trust, sustainable stakeholder networks and content championship are drivers of success for many organisations. This puts new demands on communication professionals. New job routines in the digital age stimulate questions of work load, job satisfaction, and career development through networking and mentoring. At the same time, organisations ask for stakeholders' expectations towards their communication and the effectiveness of new channels such as mobile media. An important topic which connects both developments is excellence. Attributes of professional communicators might be drivers of excellent communication functions, while in turn outperforming functions can offer interesting and rewarding tasks for communicators. The European Communication Monitor 2014 sheds light on these and many other questions. With 2,777 communication professionals from 42 countries participating and detailed analyses for 20 countries, it is the largest annual survey in the field worldwide. The ECM is also one of the most ambitious and most successful research projects in strategic communication. Until now, more than 16,500 questionnaires have been evaluated and 55,000 reports have been published or downloaded.

Many thanks to all practitioners who participated in the survey. Our partners EACD, Communication Director magazine and sponsor Ketchum provided important resources needed for the study. Additional support was provided by the advisory board and national research partners from many renowned universities. Markus Wiesenberger and Ronny Fechner did a great job as assistant researchers, while Vanessa Eggert, Grit Fiedler and Stefanie Schwerdtfeger coordinated the project on behalf of the EACD. I appreciate this support.

Prof. Dr. Ansgar Zerfass

Lead researcher; Professor of Communication Management, University of Leipzig, Germany & President, European Public Relations Education and Research Association (EUPRERA)

Research design



Research design

The European Communication Monitor (ECM) 2014 explores current practices and future developments of strategic communication in corporations, non-profits, and other organisations including communication agencies. This unique, longitudinal survey has been organised annually since 2007. The eighth edition presented in this report is based on responses from 2,777 participating professionals from 42 countries. Owing to its depth, long-term consistency of questions and structure, the ECM is known as the most comprehensive research into communication management and public relations worldwide. Each year the ECM improves the understanding of the professional practice of communication in Europe and monitors trends in strategic communication to analyse the changing framework of the profession. The study is organised by the European Public Relations Education and Research Association (EUPRERA), the European Association of Communication Directors (EACD) and Communication Director magazine. This partnership between academia and practice is supported by Ketchum, Europe's leading public relations agency, as its generous sponsor. 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 in Germany. A wider professorial advisory board and academic research collaborators ensure that the survey reflects the diversity of the field across Europe.

The research framework for the survey has been refreshed for 2014 with a number of new themes being explored through the survey questionnaire. This year it includes a large number of independent and dependent variables along five key factors: personal characteristics of communication professionals (demographics, education, job status, professional experiences); features of the organisation (structure, country); attributes of the communication function; the current situation as well as perceptions on key developments in areas like job satisfaction, work routines, career development and mentoring, networking, communication leadership, mobile communication issues and trends and a revisiting of gender issues for strategic communication.

The topics explored are both relevant for the practice and based on established academic theories about public relations and communication management. The empirical character of the study enables the profession to strengthen certain theoretical concepts in the field or reject them on the basis of the hypotheses formulated in the monitor project. Examples of the conceptual background of this year's edition are theories and empirical debates on mentoring in career development (Allen & Eby, 2010), networking (Anderson-Gough et al., 2006; Valentini, 2010), mobile communication trends (Avidar et al., 2013; McCorkindale & Morgoch, 2013), gender issues (Grunig et al., 2001; Wrigley, 2010), communication and leadership (Berger & Meng, 2014; Ketchum, 2014), as well as characteristics of excellent communication functions (Grunig et al., 2006) and alignment between communication leaders and top management (EACD, 2013; Zerfass et al., 2014a).

Longitudinal comparisons have been applied to identify dynamics in the field. To this end, several questions from previous ECM surveys (Zerfass et al., 2013, 2012, 2011, 2010, 2009, 2008, 2007) have been repeated, i.e. on job satisfaction, salaries, development of communication channels and instruments, and strategic issues.

Methodology and
demographics



Methology and demographics

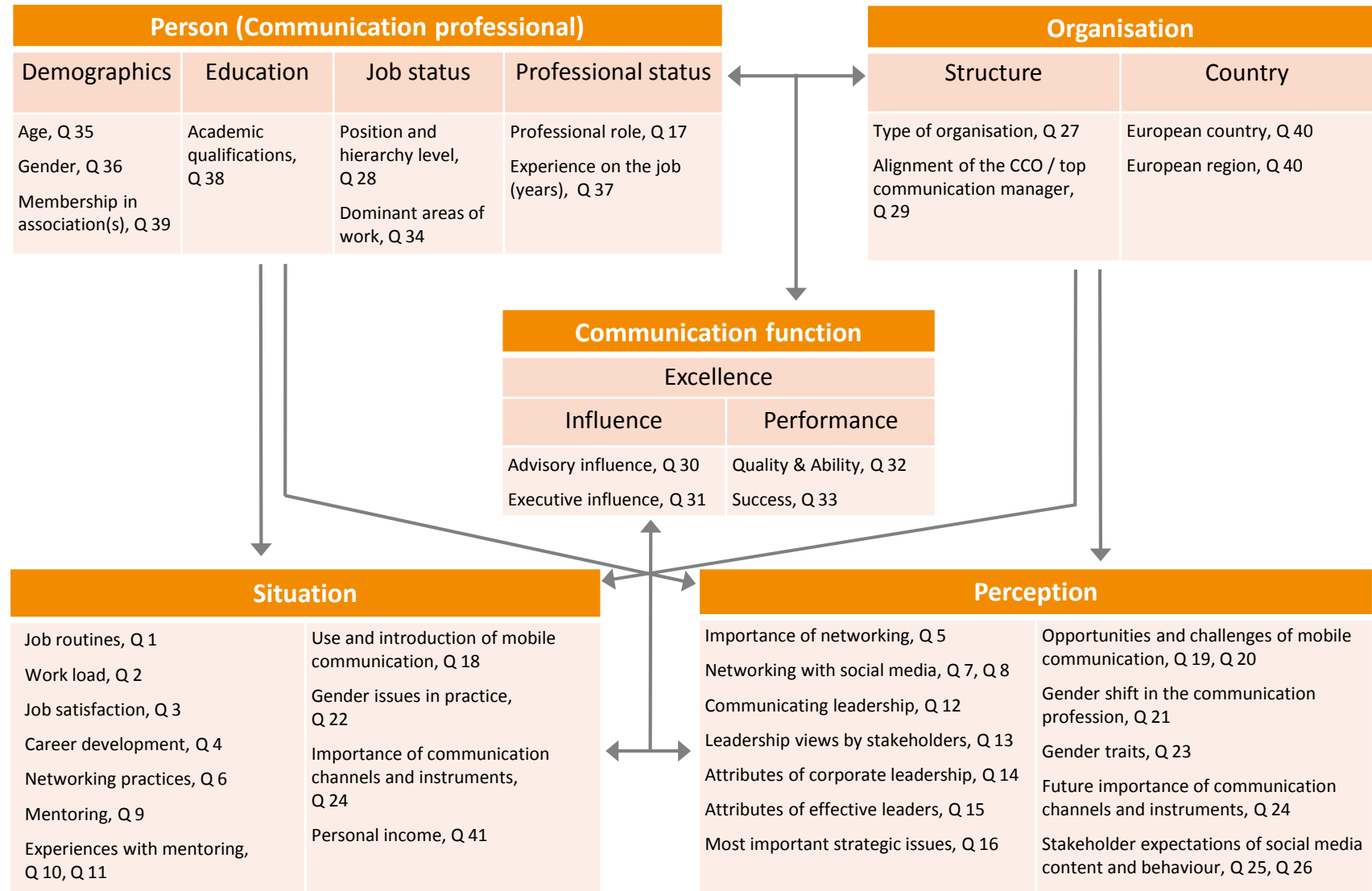
The questionnaire used for the European Communication Monitor 2014 consisted of 39 questions arranged in 18 sections. All of them were based on hypotheses and instruments derived from previous research and literature. The online survey used the English language and was pre-tested with 44 communication professionals in 16 European countries. Amendments were made where appropriate and the final questionnaire was activated for four weeks in March 2014. 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. 5,205 respondents started the survey and 2,881 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 2,777 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), Spearman's rank correlation tests (ρ), Kendall's rank correlation (τ_b), Cramér's V, and independent samples T-tests. In this report, results are classified as significant ($p \leq 0.05$)* or highly significant ($p \leq 0.01$)** in the graphics and tables or marked in the footnotes.

Two thirds of the respondents are communication leaders: 40.0 per cent hold a top hierarchical position as head of communication or as CEO of a communication consultancy; 27.6 per cent are unit leaders or in charge of a single communication discipline in an organisation. 26.1 per cent of the respondents are team members or consultants. 57.7 per cent of the professionals interviewed have more than ten years of experience in communication management, 61.7 per cent of them are female and the average age is 40.9 years. A vast majority (94.1 per cent) in the sample has an academic degree, and 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, 24.7 per cent; private companies, 18.9 per cent; government-owned, public sector, political organisations, 18.4 per cent; non-profit organisations, associations, 13.2 per cent), while 24.7 per cent are communication consultants working freelance or for agencies and consultancies.

Most respondents (32.3 per cent) are based in Western Europe (countries like Germany, Netherlands, France), followed by Northern Europe (29.0 per cent; countries like Norway, Sweden, United Kingdom), Southern Europe (25.2 per cent; countries like Italy, Spain, Greece), and Eastern Europe (13.5 per cent; countries like Poland, Romania, Russia). The universe of 50 European countries is based on the 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). Respondents from countries that are not included in the UN classification or from countries that are assigned to Western Asia were collated like adjacent nations. No respondents were registered for this survey from Albania, Azerbaijan, Belarus, Kosovo, Liechtenstein, Monaco, San Marino, and Vatican City. Overall, 42 countries participated in the survey. The dataset provided more detailed insights for 20 countries, including all key markets in Europe.

Research framework and questions



Demographic background of participants

Position

Head of Communication, Agency CEO	40.0%
Responsible for single communication discipline, Unit leader	27.6%
Team member, Consultant	26.1%
Other	6.3%

Organisation

Communication department		
▪ joint stock company	24.7%	75.3%
▪ private company	18.9%	
▪ government-owned, public sector, political organisation	18.4%	
▪ non-profit organisation, association	13.2%	
Communication consultancy, PR agency, freelance consultant		24.7%

Job experience

More than 10 years	57.7%
6 to 10 years	24.4%
Up to 5 years	17.9%

*Highest academic educational qualification**

Doctorate (Ph.D., Dr.)	6.7%
Master (M.A., M.Sc., Mag., M.B.A.), Diploma	60.8%
Bachelor (B.A., B.Sc.)	26.6%

Personal background of respondents

Gender / Age

	Overall	Head of communication, Agency CEO	Team leader, Unit leader	Team member, Consultant
Female	61.7%	52.3%	61.4%	73.3%
Male	38.3%	47.7%	38.6%	26.7%
Age (on average)	40.9 yrs	44.5 yrs	39.8 yrs	36.7 yrs

Membership in a professional organisation

▪ EACD	13.6%
▪ Other international communication association	11.8%
▪ National PR or communication association	50.2%

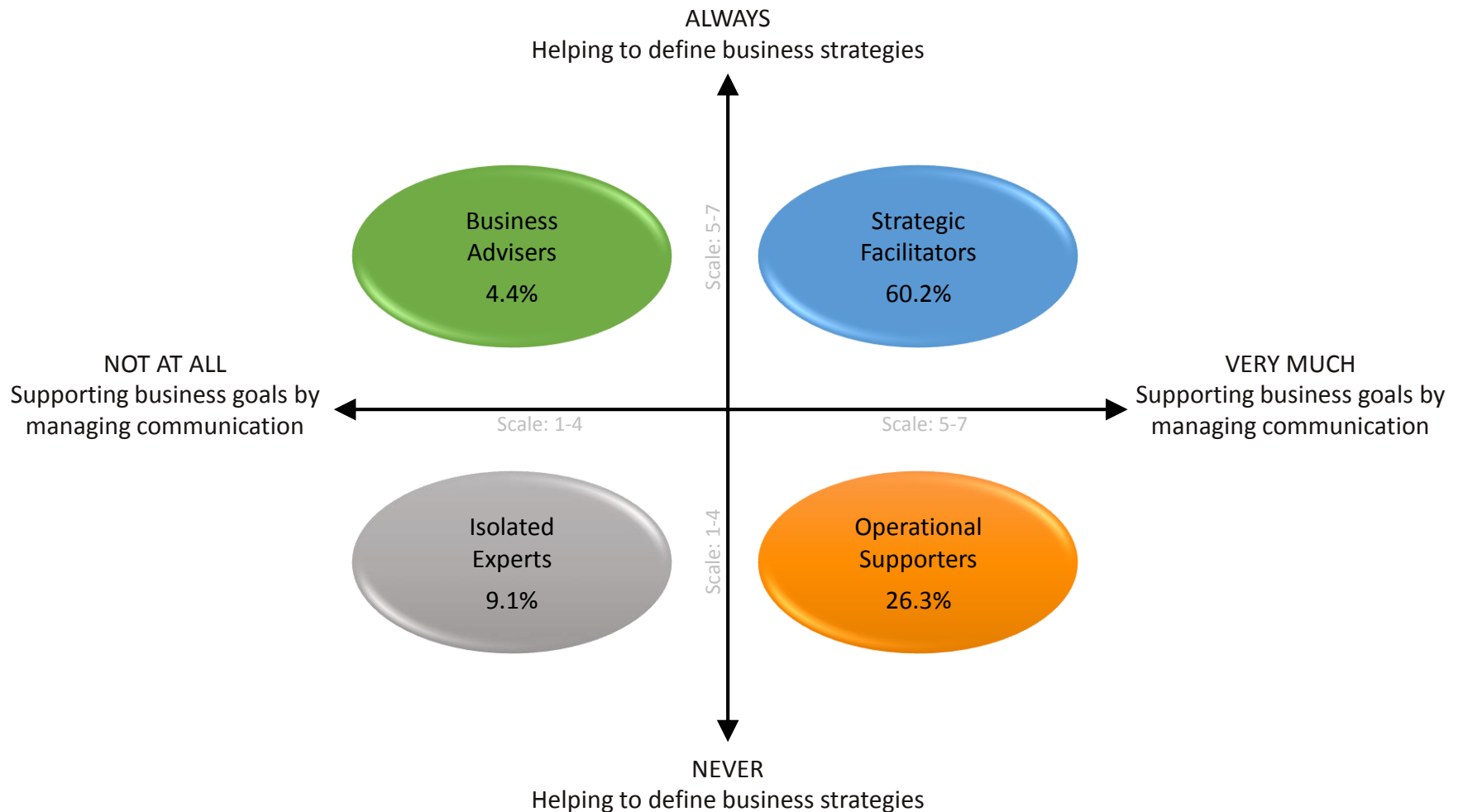
Countries and regions represented in the study

Respondents are based in 42 European countries and four regions

Northern Europe 29.0% (n = 804)	Western Europe 32.3% (n = 897)	Eastern Europe 13.5% (n = 375)	Southern Europe 25.2% (n = 663)
Denmark Estonia Finland Iceland Ireland Latvia Lithuania Norway Sweden United Kingdom	Austria Belgium France Germany Luxembourg Netherlands Switzerland	Armenia* Bulgaria Czech Republic Georgia* Hungary Moldova Poland Romania Russia Slovakia Ukraine	Andorra Bosnia and Herzegovina Croatia Cyprus* Greece Italy Macedonia Malta Montenegro Portugal Serbia Slovenia Spain Turkey*

www.communicationmonitor.eu / Zerfass et al. 2014 / n = 2,777 PR professionals. Q 40: 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>). 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, Azerbaijan*, Belarus, Kosovo**, Liechtenstein, Monaco, San Marino, Vatican City.

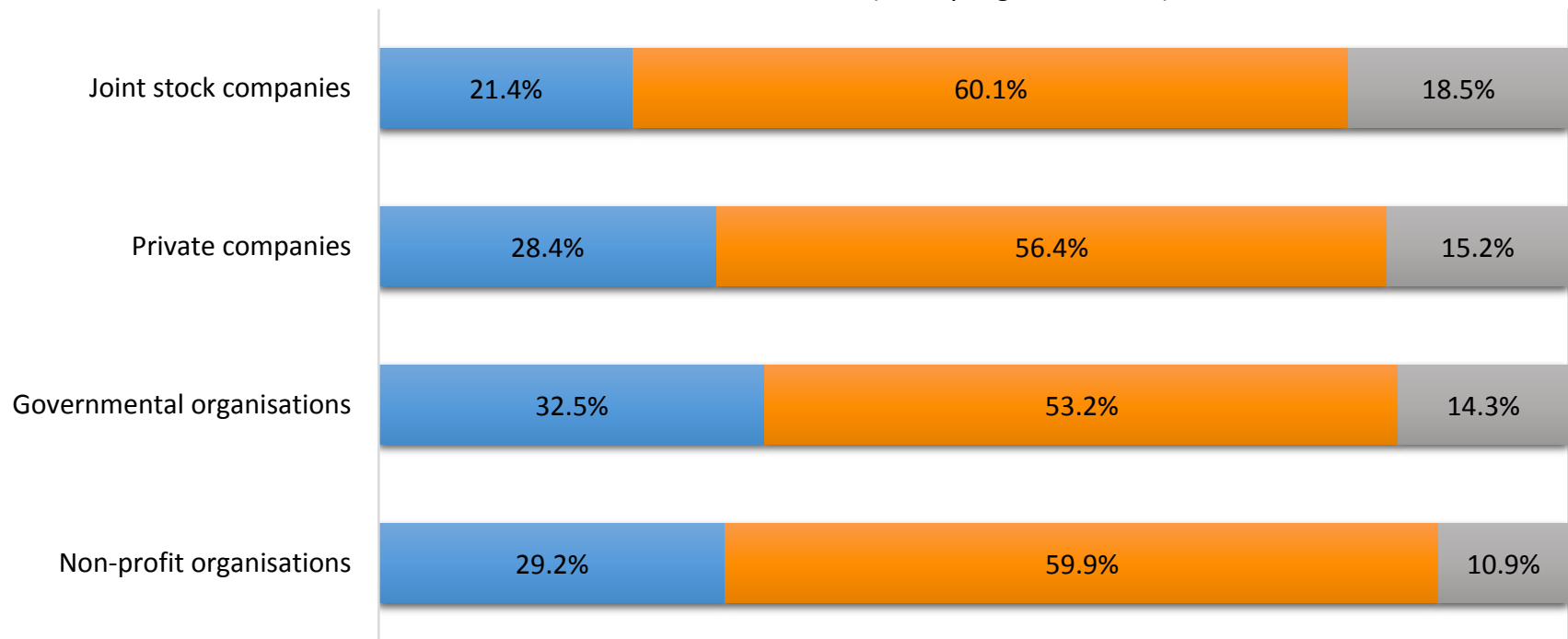
Professional roles enacted by communication professionals: A majority tries to shape business strategies, one third is purely focused on communication



Alignment of the communication function: Significant differences between different types of organisations

*The top communication manager /
chief communication officer ...*

- is a member of the executive board
(strongly aligned function)
- reports directly to the CEO or top-decision maker
(aligned function)
- does not report directly to the CEO or top decision-maker
(weakly aligned function)



www.communicationmonitor.eu / Zerfass et al. 2014 / n = 2,090 PR professionals in communication departments across Europe. Q 29: 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. Percentages: Agreement based on scale points 4-5. Highly significant differences between different types of organisations (chi-square test, $p \leq 0.01$, Cramér's V = 0.080).

**Professional communication
in the digital age**



Chapter overview

One of the consistent experiences for all professional roles in society is that technology is significantly influencing how we all do our jobs. This is especially true of the communication industries. A global study of leadership in communication (Berger & Meng, 2014) has identified 'dealing with the speed and volume of information flow' as key challenge for practitioners globally. This issue is not new, but going to stay, as Delphi studies (Linke & Zeffass, 2012) and research into the diversity of digital engagement by different demographic groups in society (Avidar et al., 2013) tell us.

The ECM 2014 clearly shows that the way communication professionals work has been changed by the digital age and rising demands from stakeholders. Respondents report about an increasing pressure in their jobs. At the same time, technology creates more opportunities. Part of this change is an increase in information flow which top level communicators seem better equipped to deal with. When analysing the increased work pressure on gender lines, women report a higher pressure, but they are also better at utilising the changing technology in their work. Again focussing on different demographic groups it is the young professionals who report an increased obligation to be 'always online'. Yet they feel that the digital age is not negative but rather provides job enrichment and also makes work easier for them. Practitioners working in traditional areas like media relations rate positive impacts comparatively low but feel the highest pressure. Overall, results show that more differentiated assessments of the changing communication environment are needed. Many tend to generalise opportunities as well as challenges, which impedes a purposive use of innovations.

Work-life balance and work load are important considerations for many professionals. The study shows that the majority of communicators in Europe are working well beyond their contracted hours. Nearly half (47.2 per cent) work at least one quarter more than formally required in the average week, with a small sub group of this number (8.8 per cent) claiming they work at least 50 per cent more than they have to.

When we drill further into the figures it is the practitioners in the joint stock companies and agencies that work significantly more of this overtime than their colleagues in other areas. Perhaps unsurprisingly top-level professionals have the greatest demand to work over their contracted hours. When analysed by gender we find that both male and female senior managers are under the same demands and pressures to perform in their jobs and both groups work a high level of overtime above their contract terms. Interestingly though female communicators who are in positions below the top level are able to more consistently maintain their working week within or closer to their contracted hours than their male counterparts. This finding is interesting in the context of literature which claims female practitioners have to accomplish more in order to achieve the same success as their male counterparts (Choi & Hon, 2002). The data suggest that women are either more efficient and better at managing their work and demands within the contract of employment, or alternatively, that they are not progressing to the senior levels because they are not able to put in the extra time needed. Either way, this is an interesting dichotomy and area for consideration and deeper understanding by employers. What emerges clearly from this study is that most of the extra work delivered over and above the standard contract is done by the youngest and the most senior communication professionals in the field.

Changing job routines of communication professionals in Europe: Many opportunities ahead, but three quarters report increasing work pressure

Impact of new technologies and the rising importance of strategic communication

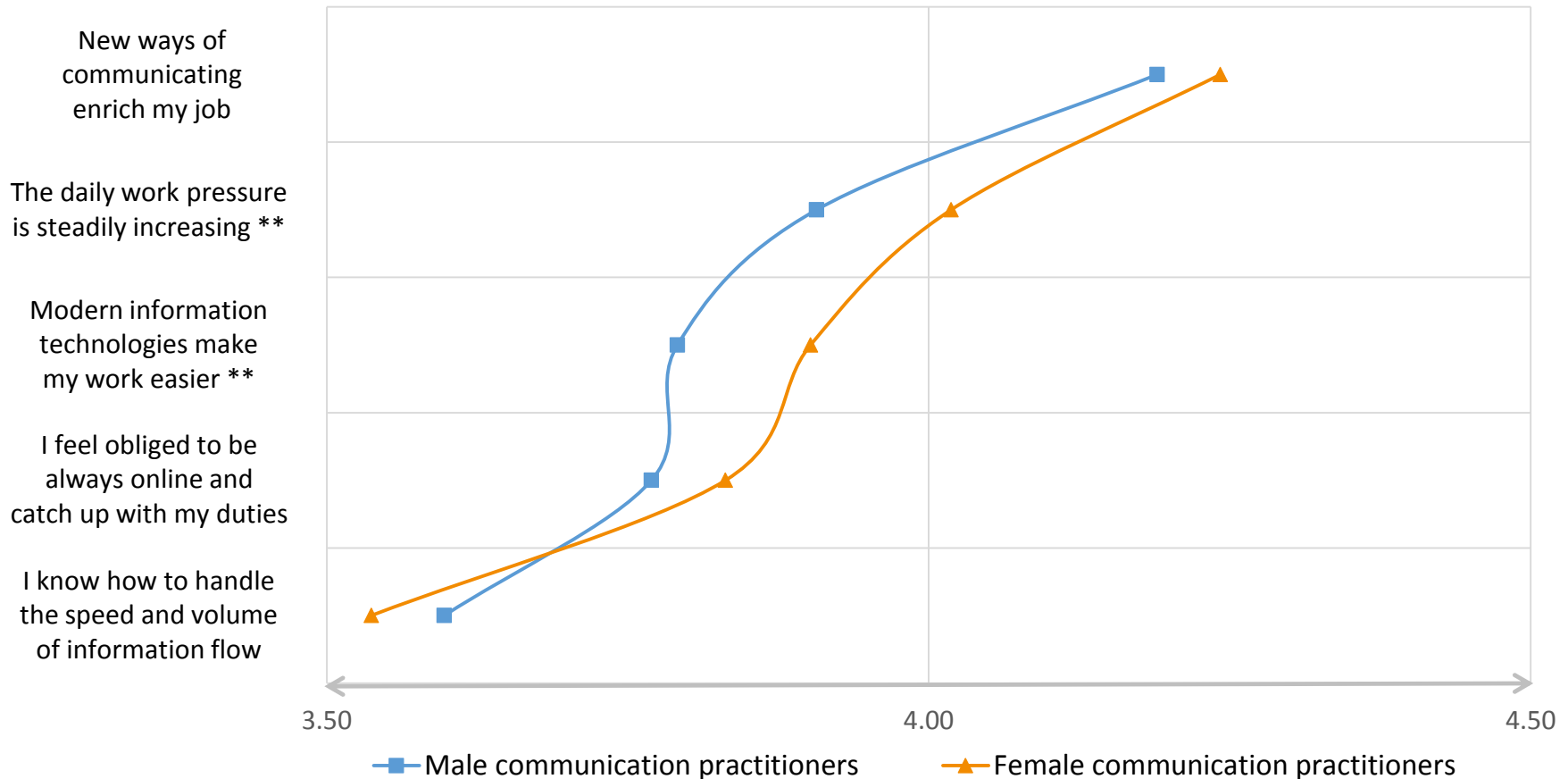


Top-level communication professionals know better how to deal with the information flow

	Head of communication, agency CEO	Team leader, unit leader	Team member, consultant	Overall
New ways of communicating enrich my job	4.23	4.25	4.22	4.23
The daily work pressure is steadily increasing	4.01	3.95	3.97	3.98
Modern information technologies make my work easier	3.84	3.85	3.92	3.86
I feel obliged to be always online and catch up with my duties	3.83	3.81	3.75	3.80
I know how to handle the speed and volume of information flow **	3.61	3.58	3.46	3.56

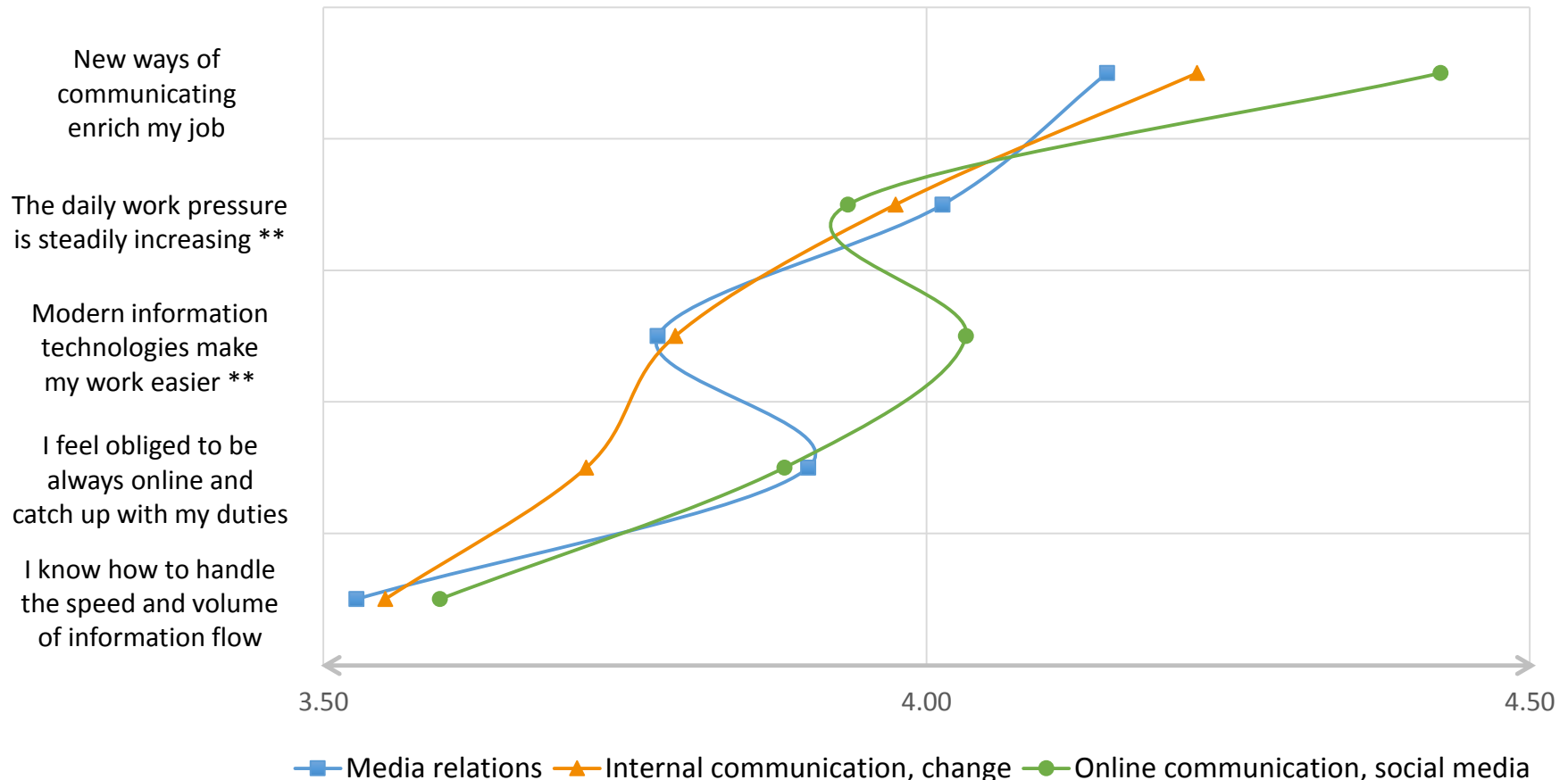
Female professionals report a significantly higher increase of work pressure, but they are better at utilising digital technologies in their daily job

Impact of new technologies and the rising importance of strategic communication



Job routines have changed quite differently, depending on the area of communication in which professionals are working

Impact of new technologies and the rising importance of strategic communication

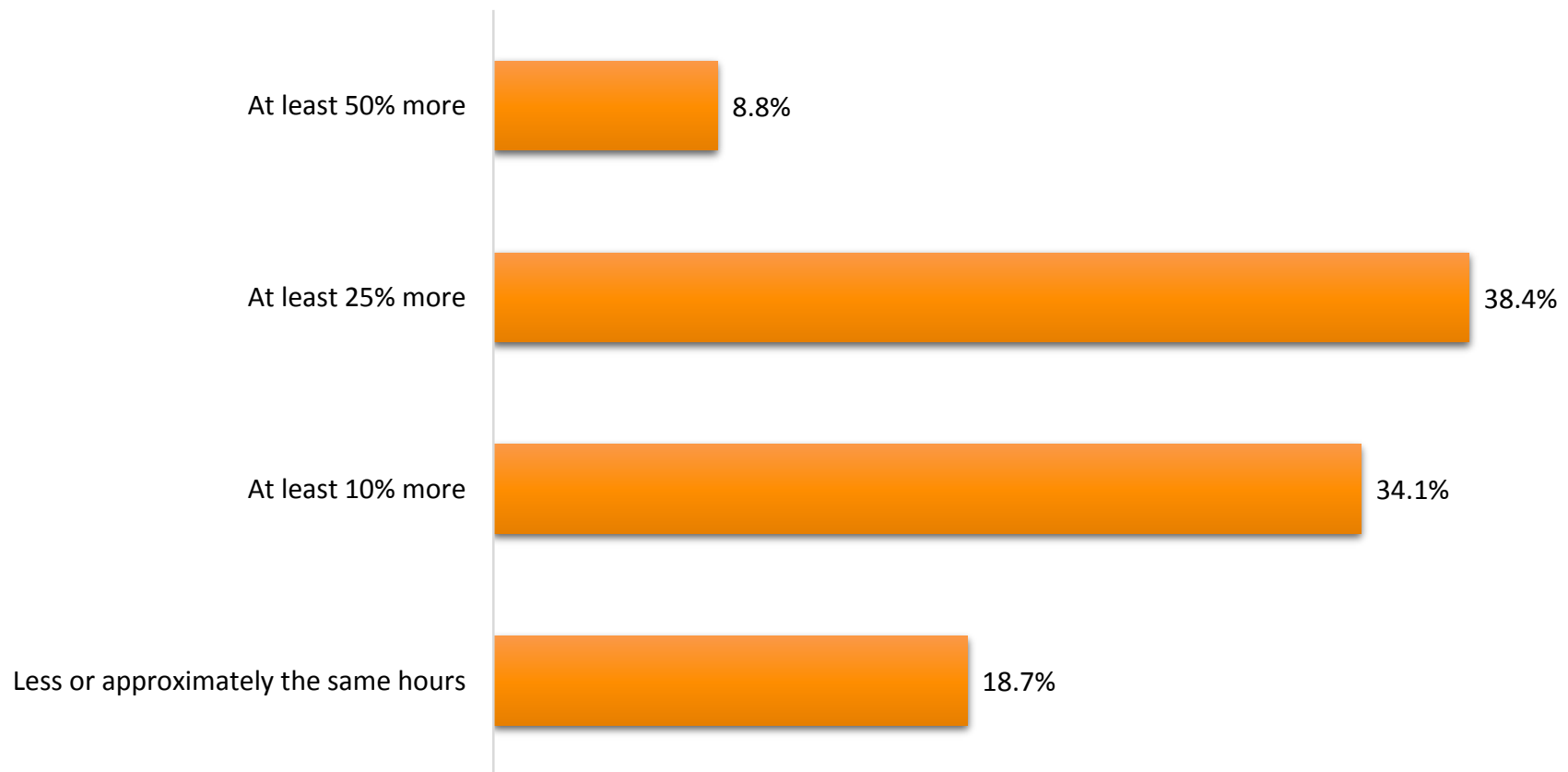


Younger communication professionals feel obliged to be “always online”; technologies are drivers for job enrichment and make work easier for them

	29 or younger	30 - 39	40 - 49	50 - 59	60 or older	<i>Overall</i>
New ways of communicating enrich my job **	4.26	4.25	4.22	4.19	4.01	4.22
The daily work pressure is steadily increasing	3.96	3.98	3.97	4.01	3.87	3.98
Modern information technologies make my work easier **	4.06	3.90	3.80	3.73	3.91	3.86
I feel obliged to be always online and catch up with my duties **	4.03	3.87	3.74	3.67	3.68	3.81
I know how to handle the speed and volume of information flow	3.59	3.61	3.50	3.56	3.53	3.56

Work load of communication professionals in Europe

Working hours in an average week (compared to the employment/job contract)

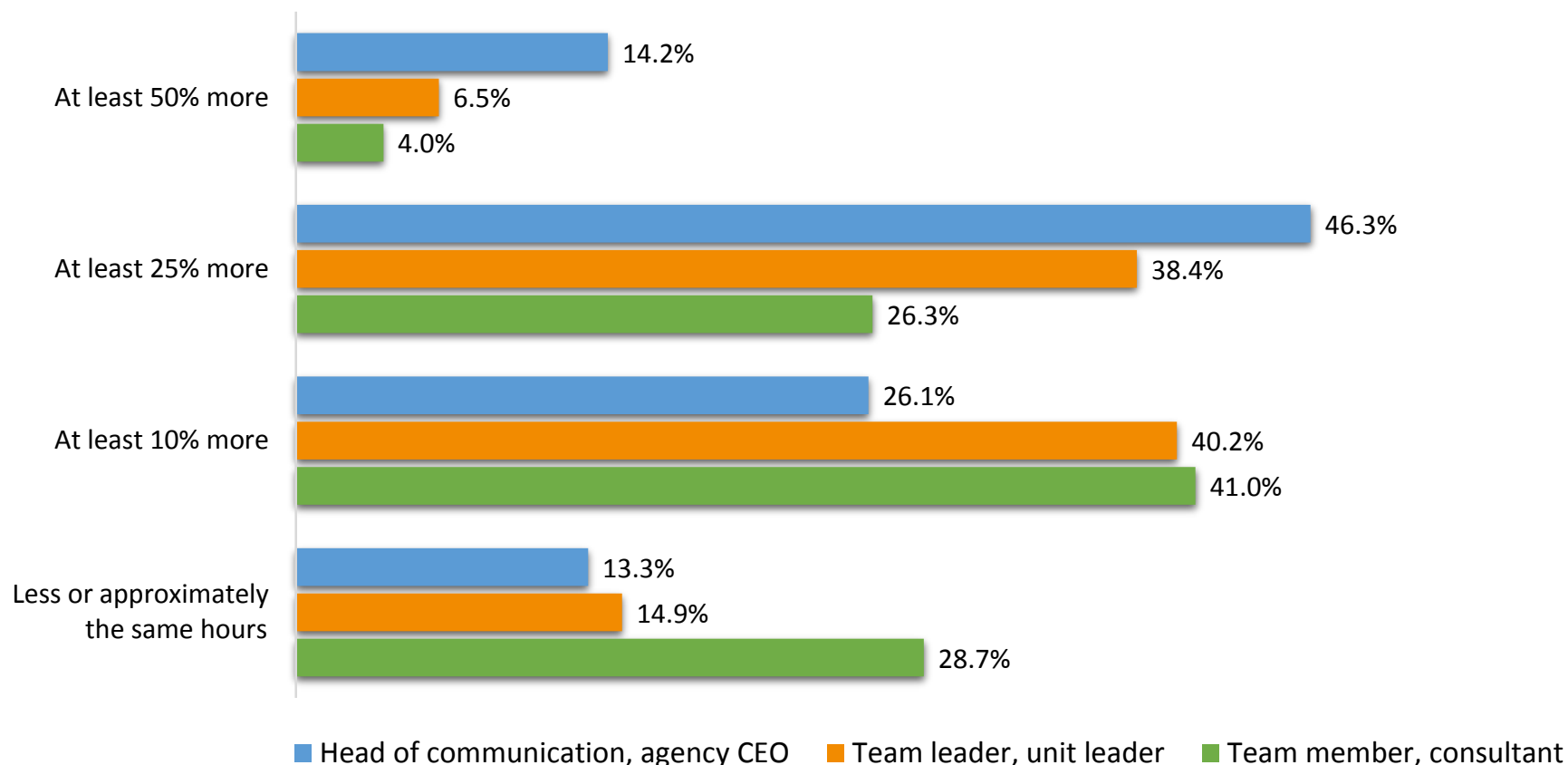


Professionals in joint stock companies and agencies work significantly more overtime than colleagues in other organisations

	Joint stock companies	Private companies	Governmental Organisations	Non-profit organisations	Consultancies & Agencies	<i>Overall</i>
At least 50% more	10.2%	9.1%	6.1%	6.8%	10.3%	10.2%
At least 25% more	46.0%	36.2%	29.4%	34.6%	41.2%	38.4%
At least 10% more	33.2%	35.0%	36.8%	35.1%	31.9%	34.1%
Less or approximately the same hours	10.6%	19.6%	27.8%	23.4%	16.6%	18.7%

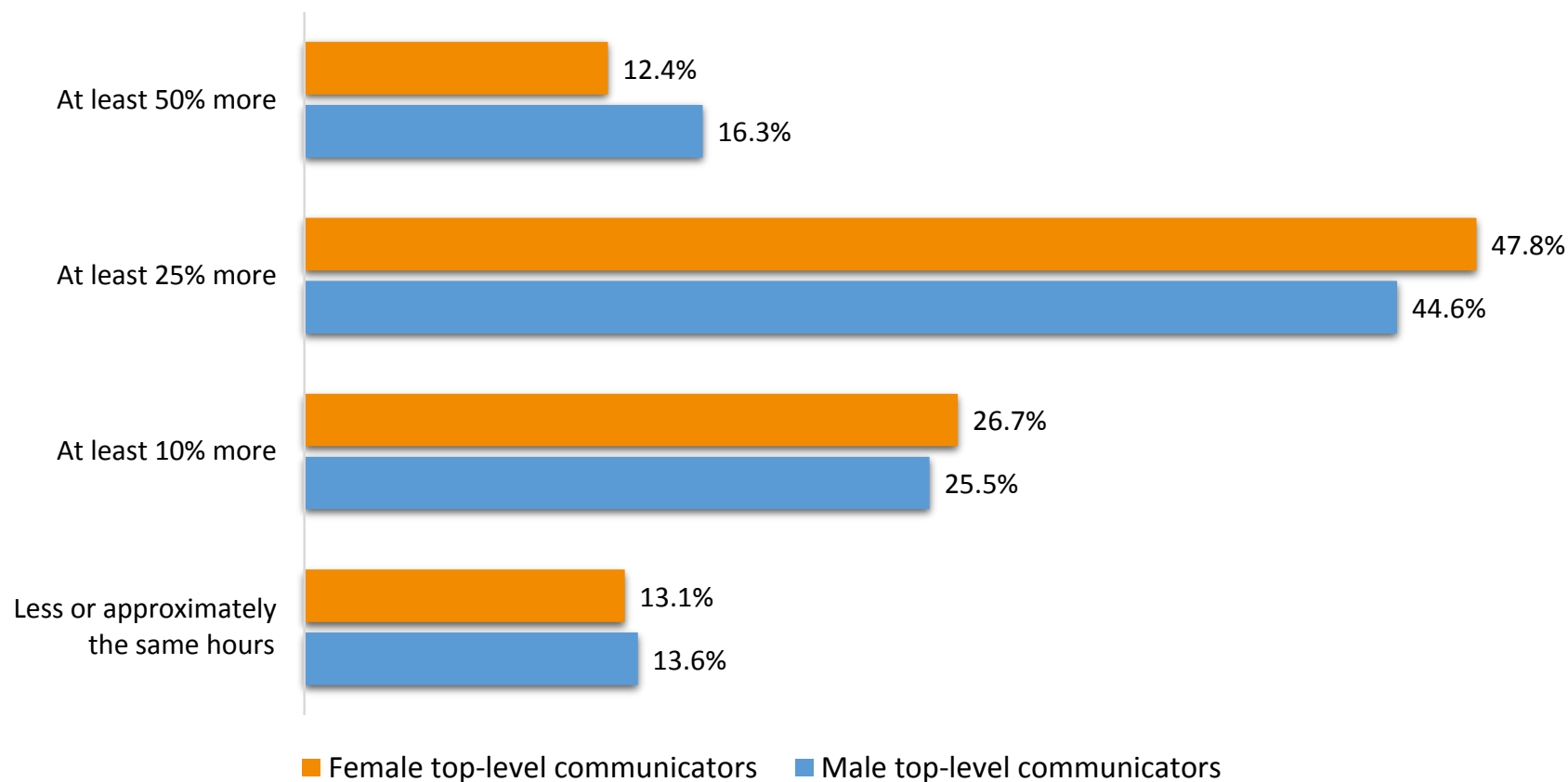
Not surprisingly, top-level communicators report more extra hours than practitioners on other levels of the hierarchy

Working hours in an average week (compared to the employment/job contract)



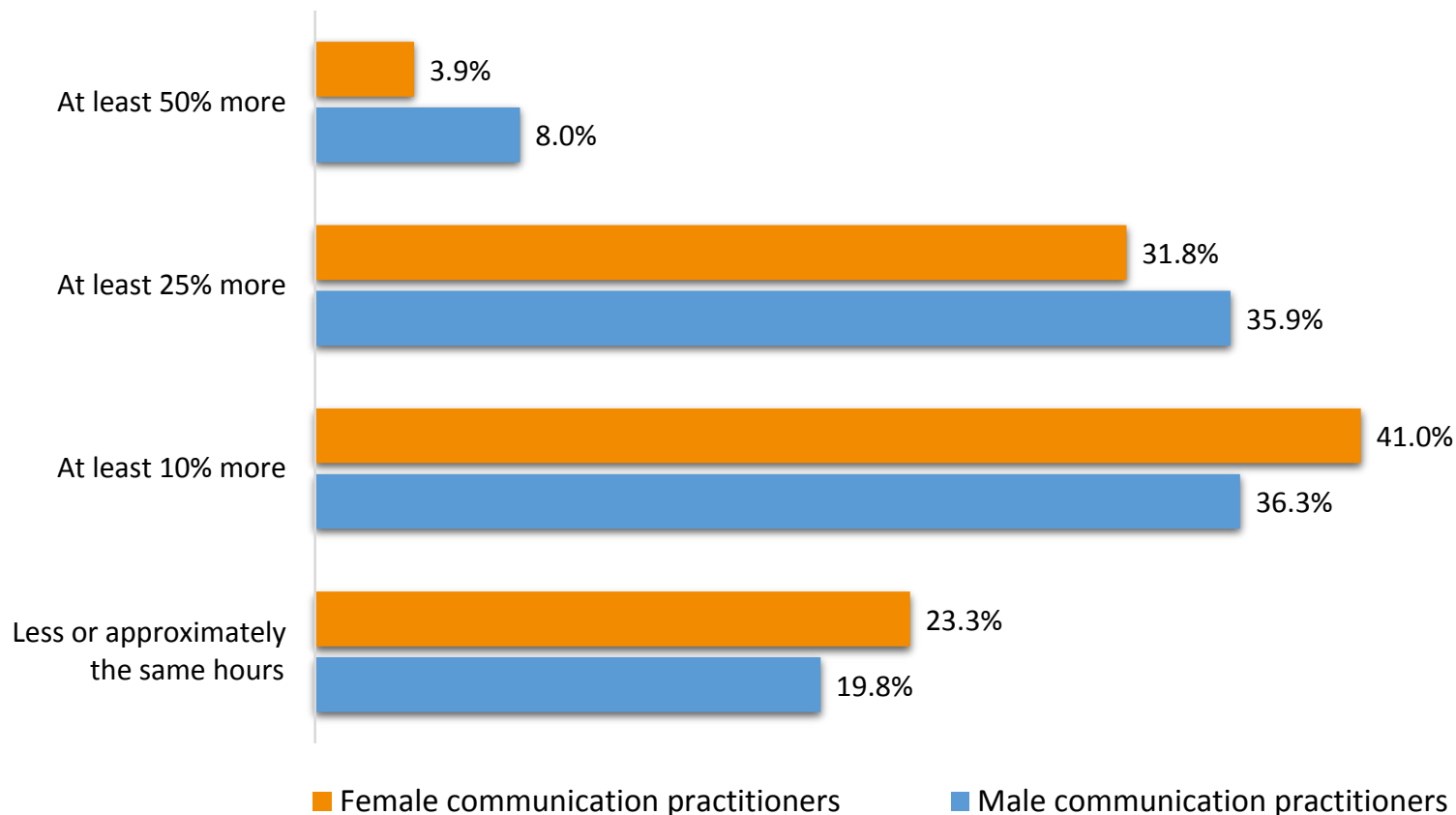
Male and female heads of communication work overtime without significant differences related to their gender

Working hours in an average week (compared to the employment/job contract)



At all levels below the top hierarchy, female communicators are better at managing to stay within their standard contract hours

Working hours in an average week (compared to the employment/job contract)



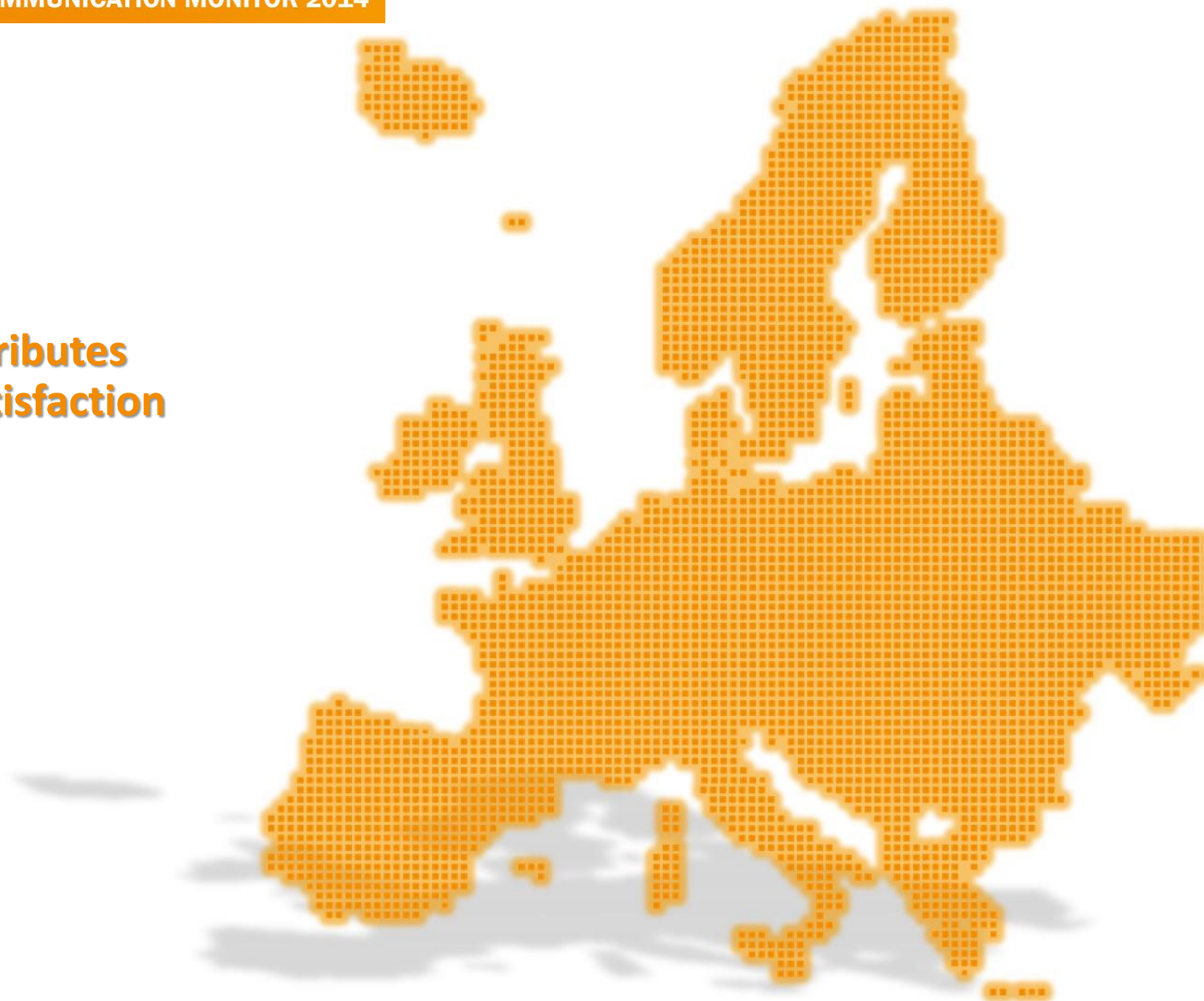
Most extra work is done by the youngest and the most senior practitioners

	29 or younger	30 - 39	40 - 49	50 - 59	60 or older	<i>Overall</i>
At least 50% more	10.2%	9.1%	6.1%	6.8%	10.3%	8.8%
At least 25% more	46.0%	36.2%	29.4%	34.6%	41.2%	38.4%
At least 10% more	33.2%	35.0%	36.8%	35.1%	31.9%	34.1%
Less or approximately the same hours	10.6%	19.6%	27.8%	23.4%	16.6%	18.7%

The typical work load of professionals differs,
depending on role specific areas of communication

	Media relations	Marketing, brand, consumer communication	Online communication, social media *	Internal communication, change	Governmental relations, public affairs, lobbying
At least 50% more	8.5%	6.7%	8.3%	7.7%	11.0%
At least 25% more	39.3%	37.1%	33.1%	33.3%	40.9%
At least 10% more	36.6%	38.7%	37.6%	37.5%	31.2%
Less or approximately the same hours	15.6%	17.4%	21.1%	21.5%	16.9%

**Job attributes
and satisfaction**



Chapter overview

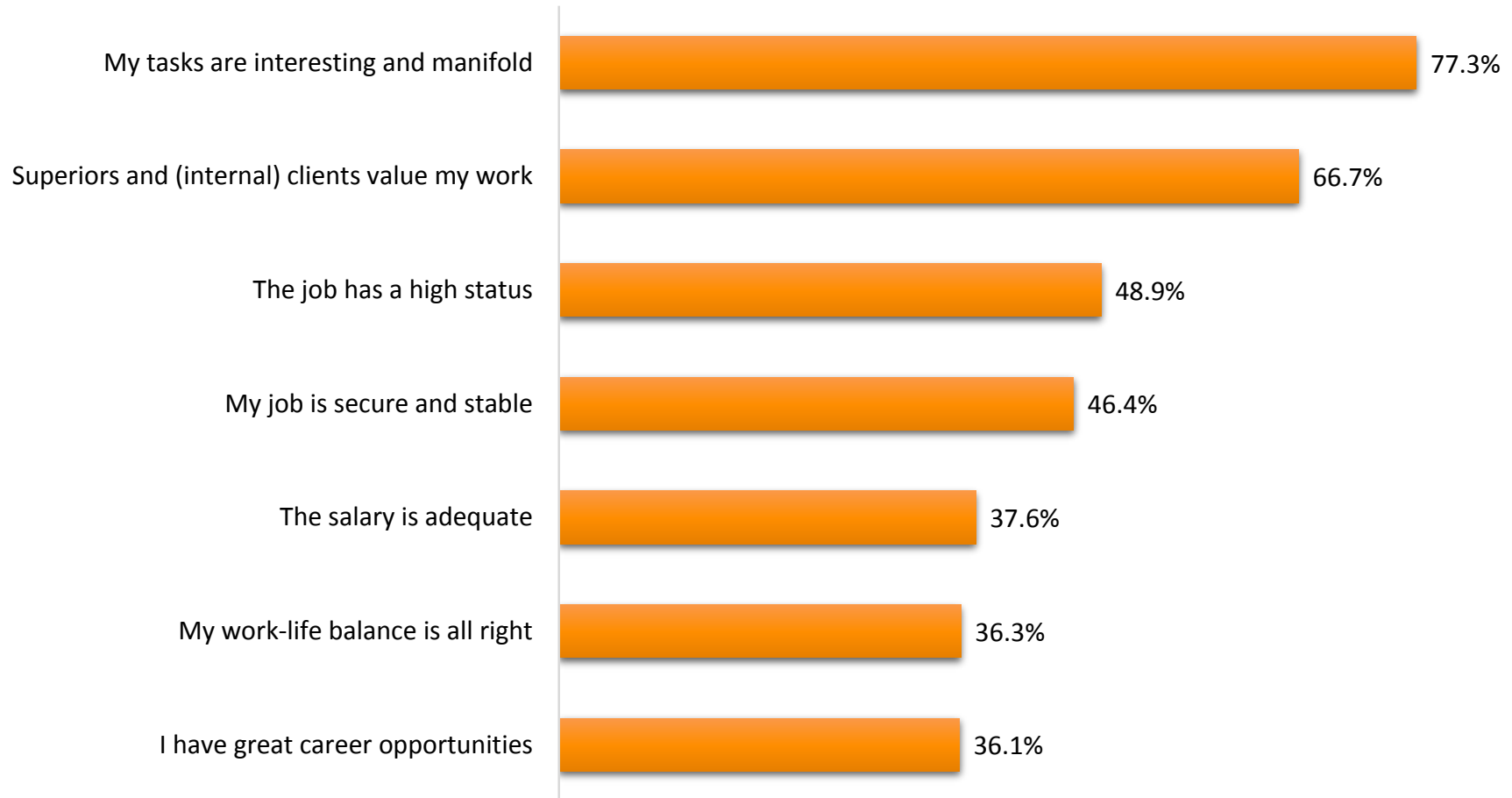
One of the overriding findings from the ECM 2014 is that communication professionals in Europe enjoy a stimulating job. They experience their tasks as interesting and varied (77.3 per cent) and they feel valued by their superiors and (internal) clients (66.7 per cent). On the other hand, only slightly more than a third of them find their salary adequate (37.6 per cent), work-life balance right (36.3%) and see enough opportunities in their personal career (36.1 per cent). Compared to the measurement done four years ago for the ECM 2010 (Zerfass et al., 2010), communication professionals rate their job situation lower on all dimensions. The economic crisis with its spill-over into social and political systems has obviously taken its toll in all types of organisation.

Most practitioners (66.5 per cent) are still satisfied with their actual job situation. The percentage of those who are unhappy grew from 9.7 per cent in 2010 to 11.4 per cent in 2014. Denmark, Austria, the Netherlands and Norway seem to provide the best communication work environment with Romania and Belgium the worst. The strongest drivers of job satisfaction are (in descending order) interesting and manifold tasks, great career opportunities, appreciation from superiors and (internal) clients and status of the job. Adequate salary, job security and stability and work-life balance are less important. This explains the good level of job satisfaction in spite of the drawbacks reported for some aspects. Employers have to be aware that there are some significant differences between different types of organisation. While the distribution of interesting and manifold tasks seems to be pretty equal, professional communicators enjoy higher job status in joint stock and private companies, higher work-life balance and job security and stability in governmental organisations, and higher career opportunities in consultancies. There are also some noticeable differences between the genders: female practitioners perceive greater career opportunities – probably because most of them are still at lower levels of the hierarchy – while male practitioners enjoy higher job status and more security and stability.

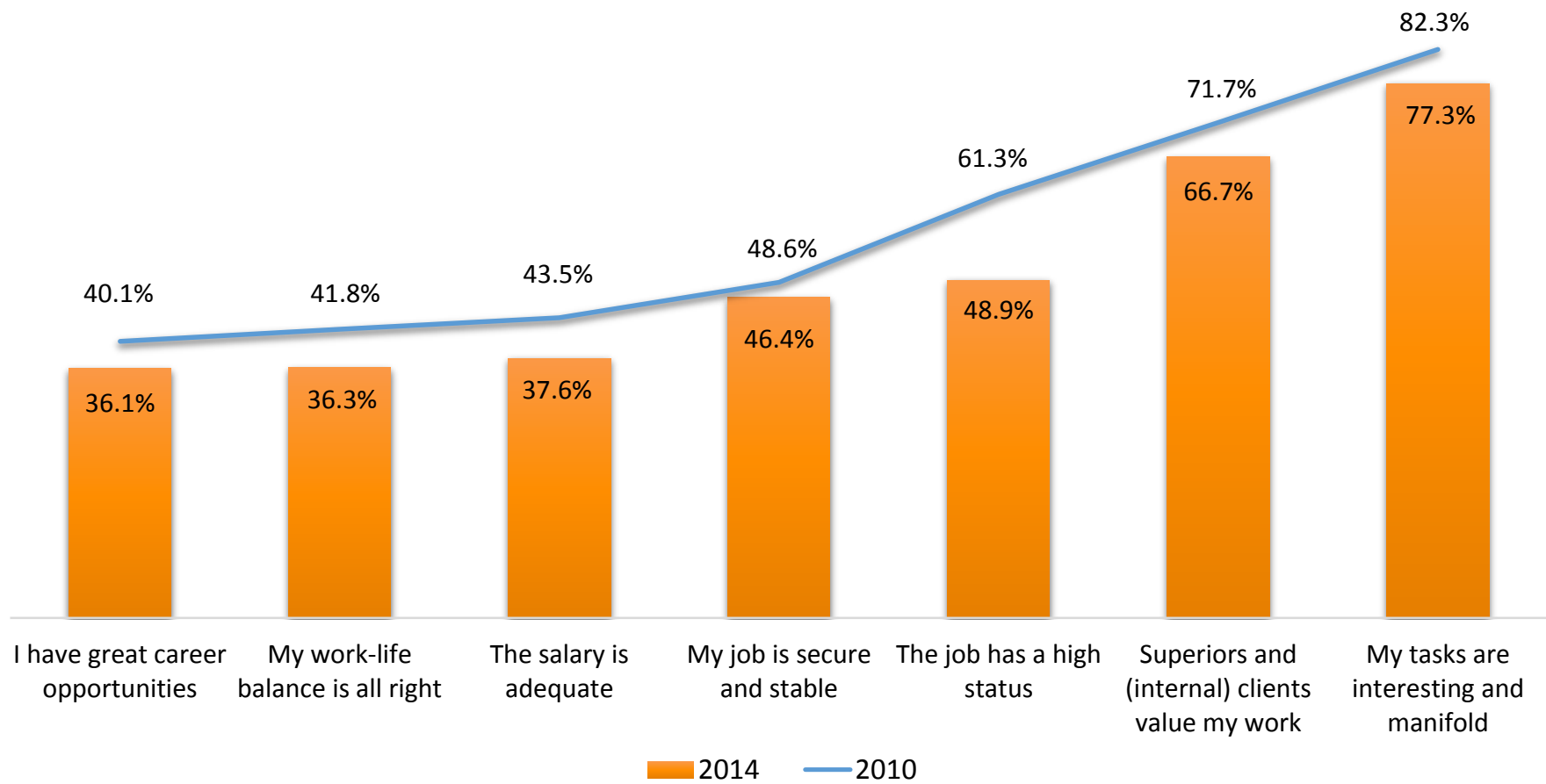
The survey also reveals an interesting trajectory of career development in the communication profession. For instance, job attributes and satisfaction change with age. The youngest cohort (29 years old or younger) reports the lowest satisfaction with their salary, but they see the highest career opportunities. In contrast the middle cohort (between 40 and 49 years old) is satisfied with their salary, but is less positive about and losing perspective in career opportunities. In the light of the overall demographic situation in Europe, professional communication seems to have an early and too premature saturation point in career development. Overall job satisfaction is related to one's position in the hierarchy: the most satisfied are those on the top (heads of communication and agency CEOs), while the least are those on the bottom (team members and consultants). But the top position comes with the price of an unbalanced work-life situation. Also functional responsibilities matter: those working on strategy and coordination are more satisfied with their jobs than those working in media relations, online and internal communications.

With the European economy recovering, it is fair to ask if job satisfaction in professional communication has reached the bottom in 2014, or whether there will be a lag (and how long) in recovery. There may even be long-term effects of the past five years of restructuring and savings in the economies of Europe.




Communication professionals enjoy an interesting job – but salaries, career opportunities and work-life-balance are often criticised



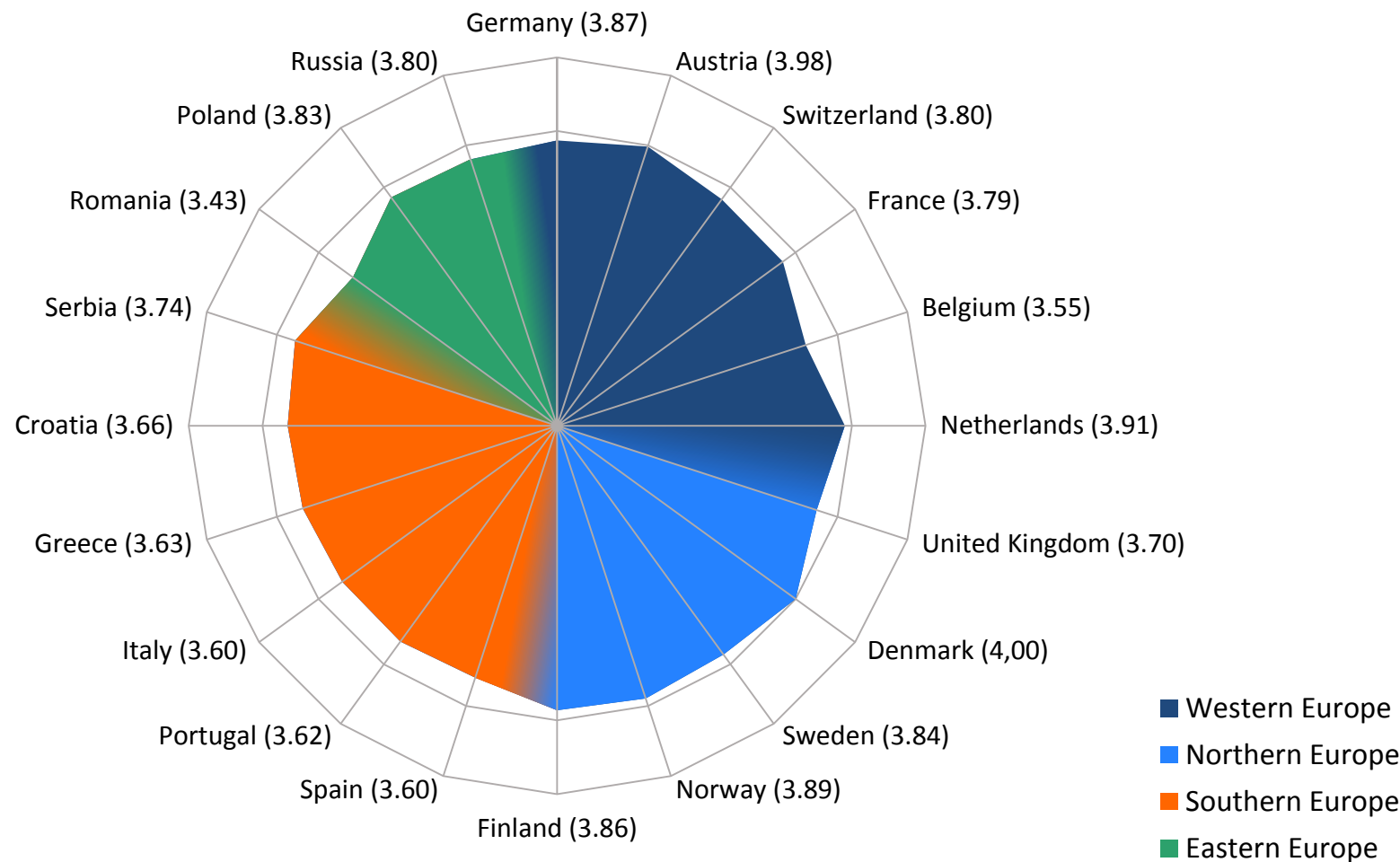
Professionals rate their job situation less positively compared to 2010



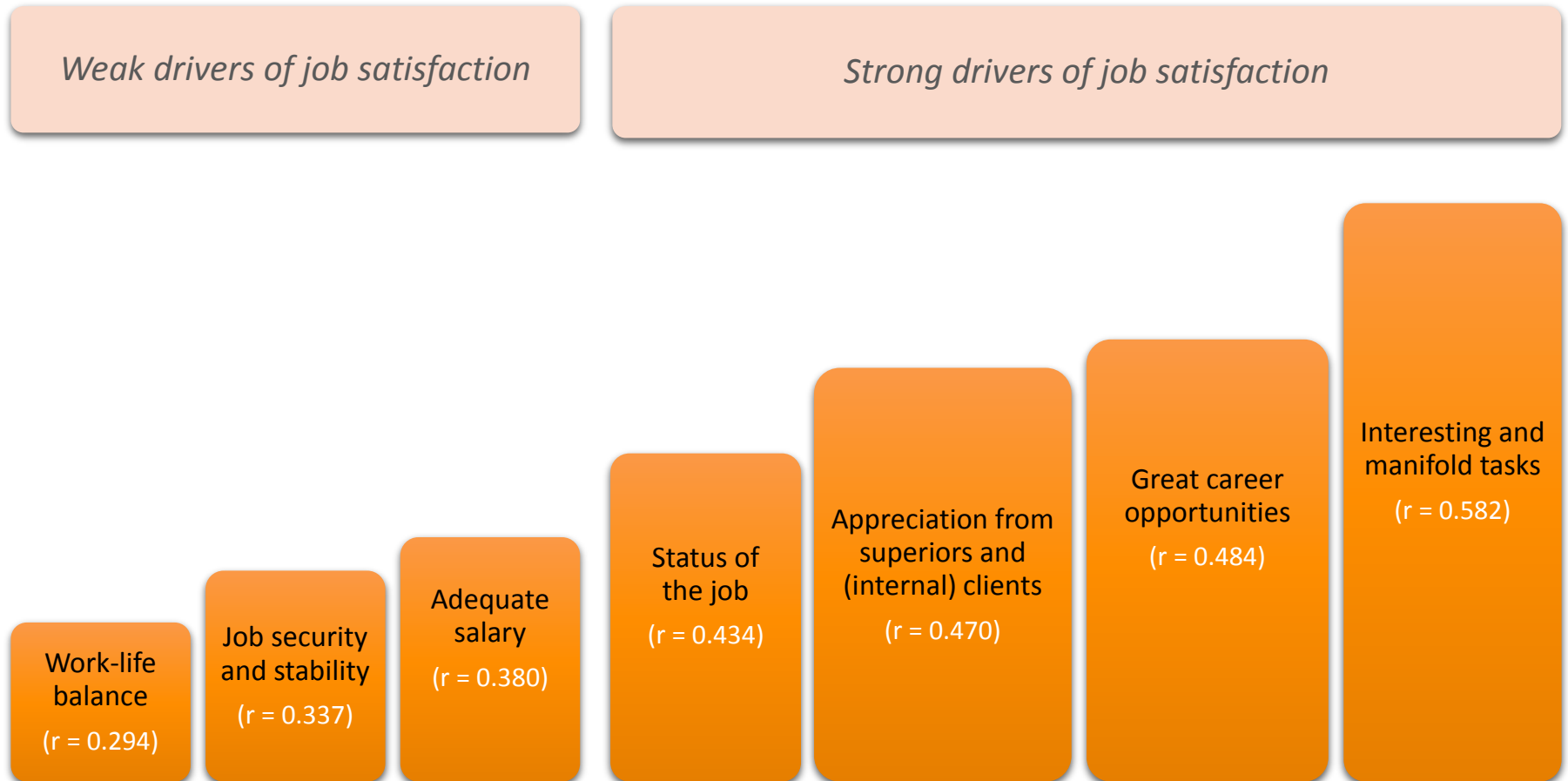
Most practitioners in Europe are satisfied with their job,
but contentment is lower than some years ago

Job satisfaction	2010	2014
	69.2%	66.5%
	are satisfied with their actual job situation	
	22.1%	21.1%
	gave a neutral answer	
	9.7%	11.4%
	are unhappy with their job	

Job satisfaction among communication professionals across Europe



Drivers of job satisfaction for communication professionals



Attributes of communication jobs in different types of organisations

	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations	Consultancies and agencies	Overall
My tasks are interesting and manifold	4.01	3.98	4.05	3.99	4.01	4.01
The job has a high status *	3.44	3.45	3.34	3.32	3.41	3.40
My work-life balance is all right **	2.96	3.07	3.18	3.17	2.94	3.04
The salary is adequate **	3.15	3.07	3.01	2.97	2.98	3.04
I have great career opportunities **	3.06	3.09	2.85	3.02	3.35	3.09
My job is secure and stable **	3.24	3.26	3.57	3.37	3.04	3.27
Superiors and (internal) clients value my work	3.70	3.70	3.67	3.74	3.85	3.74
Overall, I am satisfied with my job	3.82	3.74	3.73	3.72	3.77	3.76

Female professionals report better career opportunities, while male communicators enjoy higher status and job security

	Female	Male	Overall
My tasks are interesting and manifold	77.2%	77.5%	77.3%
The job has a high status **	46.4%	53.0%	48.9%
My work-life balance is all right *	36.2%	36.4%	36.3%
The salary is adequate	37.0%	38.6%	37.6%
I have great career opportunities **	36.7%	35.2%	36.1%
My job is secure and stable *	46.1%	47.0%	46.4%
Superiors and (internal) clients value my work	65.9%	68.0%	66.7%
Overall, I am satisfied with my job	65.2%	68.6%	66.5%

Job attributes and satisfaction in different age groups: Opening new horizons for those over 40 is a challenge for the profession

	29 or younger	30 - 39	40 - 49	50 - 59	60 or older	Overall
My tasks are interesting and manifold	72.4%	76.7%	76.5%	82.6%	84.5%	77.3%
The job has a high status	41.9%	46.9%	48.5%	55.9%	64.1%	48.9%
My work-life balance is all right	40.2%	37.0%	34.3%	35.7%	35.9%	36.3%
The salary is adequate **	27.6%	36.1%	41.4%	40.0%	41.7%	37.6%
I have great career opportunities **	42.2%	40.8%	32.6%	29.3%	32.0%	36.1%
My job is secure and stable	48.1%	49.9%	43.6%	43.3%	45.6%	46.4%
Superiors and (internal) clients value my work	67.0%	68.8%	65.0%	65.4%	67.0%	66.7%
Overall, I am satisfied with my job	65.0%	66.4%	65.6%	68.0%	73.8%	66.5%

Top-level communicators are ahead in most respects, except for work-life-balance

	Head of communication, agency CEO	Team leader, unit leader	Team member, consultant	Kendall's <i>tau b</i>
My tasks are interesting and manifold **	4.17	3.96	3.86	$\tau = -0.144$
The job has a high status **	3.66	3.36	3.09	$\tau = -0.214$
My work-life balance is all right **	2.98	2.98	3.19	$\tau = 0.058$
The salary is adequate **	3.19	3.05	2.87	$\tau = -0.096$
I have great career opportunities **	3.28	3.02	2.94	$\tau = -0.121$
My job is secure and stable	3.28	3.34	3.24	—
Superiors and (internal) clients value my work **	3.88	3.69	3.63	$\tau = -0.100$
Overall, I am satisfied with my job **	3.93	3.70	3.63	$\tau = -0.117$

Professionals working in areas with a strategic focus are ahead of colleagues in media relations, online and internal communications

	Media relations	Strategy and coordination comms	Consultancy, advising, coaching, key account	Marketing, brand, consumer comms	Online comms, social media	Internal comms, change	Governmental relations, public affairs, lobbying
My tasks are interesting and manifold	3.97	4.16	4.08	3.98	3.99	3.97	3.97
The job has a high status	3.44	3.58 **	3.46	3.33	3.30	3.25 **	3.49
My work-life balance is all right	2.95	3.01	3.05	3.07	3.15	3.14	2.99
The salary is adequate	3.04	3.17 **	3.13	3.05	2.79 **	3.10	3.15
I have great career opportunities	3.03 *	3.26 **	3.20	3.13	3.12	2.98	3.16
My job is secure and stable	3.31	3.44 **	3.19	3.23	3.27	3.24	3.22
Superiors and (internal) clients value my work	3.70 *	3.84 **	3.85 **	3.77	3.71	3.62	3.83
Overall, I am satisfied with my job	3.79	3.91 **	3.80	3.75	3.66	3.76	3.71

Career development and mentoring



Chapter overview

Communication professionals in Europe report the three most important factors for career development and obtaining their current position were networking among peers and colleagues (78 per cent), further education on or off the job (71 per cent), and moving to a new employer (71 per cent). For young employees the most significant factor was having work experience or an internship prior to the job (74 per cent). While for the mid career, middle aged employees (30-39 and 40-49) the most significant career booster is changing their employer (74.4 and 72.1 per cent respectively).

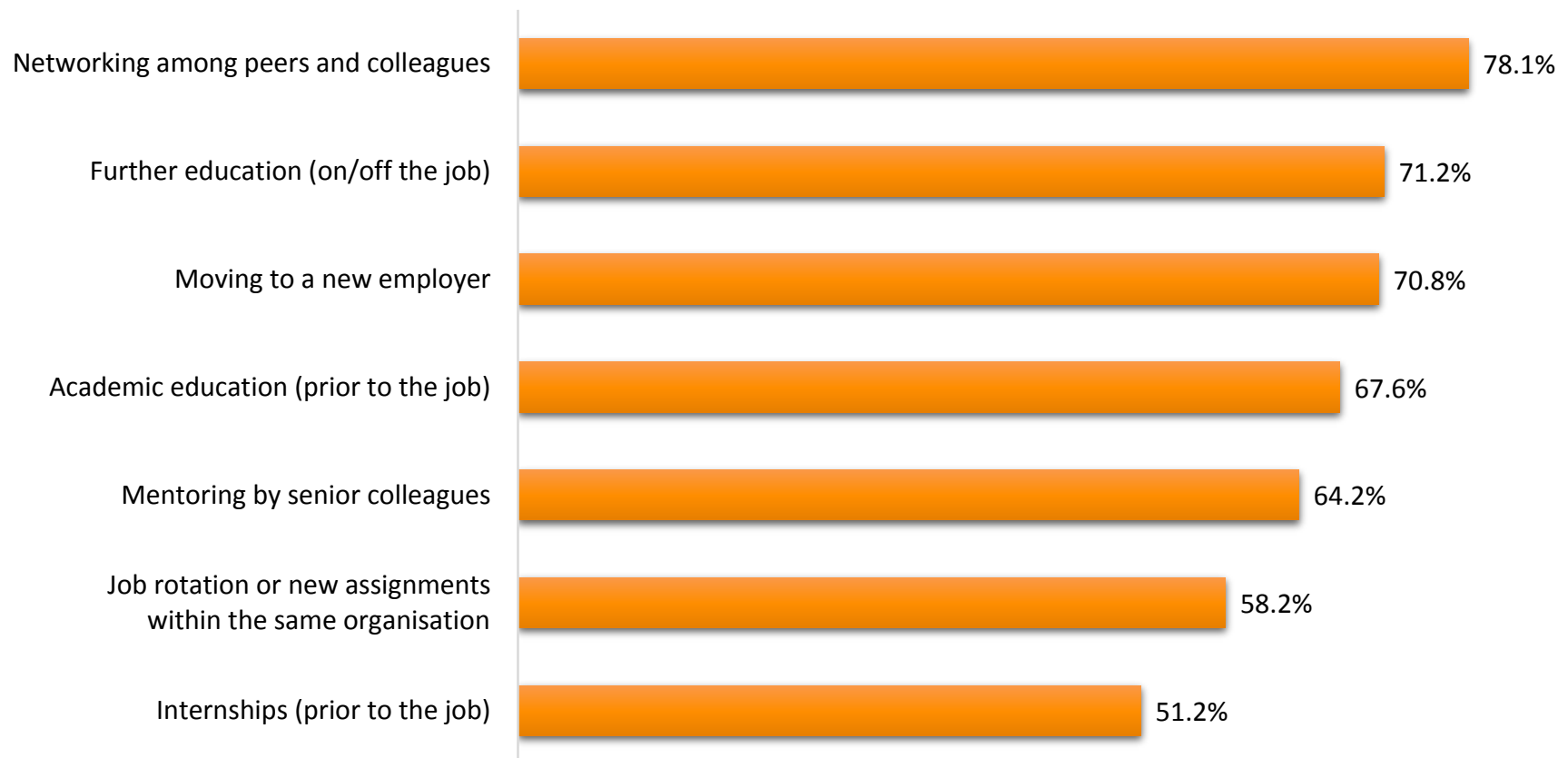
Geographically the study has identified regional differences. In Southern Europe, networking is reportedly more important for career development than in Northern Europe. Other marked regional differences are for job rotation, which is seen as more important in the East and South as well as specifically in France, Belgium and the Netherlands. Internships on the other hand are less valued in Norway, Sweden and the United Kingdom. Professions, including law and accountancy, identify networking and mentoring as essential individual career projects which help individuals to manage and develop their careers through socialisation (Anderson-Gough, 2006; Hanlon, 2004). From a larger perspective, co-presence, familiarity, and face-to-face interactions inherent in these forms create trust (Giddens, 1991) and structures which can stabilize business relationships (Ouchi, 1980).

In support of previous research (Allen & Eby, 2010), mentoring is seen as important by a clear majority of communication professionals. Interestingly, both the youngest and oldest, most experienced practitioners name mentoring as one of the top three aspects of career development. Career sponsorship is one of the primary functions fulfilled by a mentor (Kram, 1985) and mentors are usually found at higher organisational levels (Seibert et al., 2001). Typically, they will discuss options and dilemmas with mentees, and advance their careers in organisations through providing sponsorship, coaching, exposure and visibility, protection, and challenging work assignments (Kram, 1983). As sponsors, mentors actively nominate mentees for projects and promotions, publicly advocate them for their abilities and champion their behaviours. As coaches, mentors provide access to information that is available only to higher-level members of the organisation, share career histories, suggest specific strategies to achieve career goals, and provide assistance in job-related skills and knowledge (Ghosh & Reio, 2013).

Statistical analysis of the ECM 2014 data has revealed significant correlations between mentoring and job satisfaction. Communication professionals who had been mentors as well as mentees during their career are most satisfied in the job, followed by those who had been mentors and those who had only been mentees. Despite these positive effects, one third of the respondents never had a mentor. Female respondents have been less involved in mentoring programmes than their male counterparts. Those professionals are excluded from several positive effects of mentoring identified in the study. First of all, mentoring makes mentees think and feel more professional. Moreover, mentors convey personal values, work ethics and strategies for achieving career goals. Thinking of the future, tailor-made mentoring programs for communicators seem to be a valuable approach to develop communication functions in organisations and the profession at large.

Career development for communication professionals

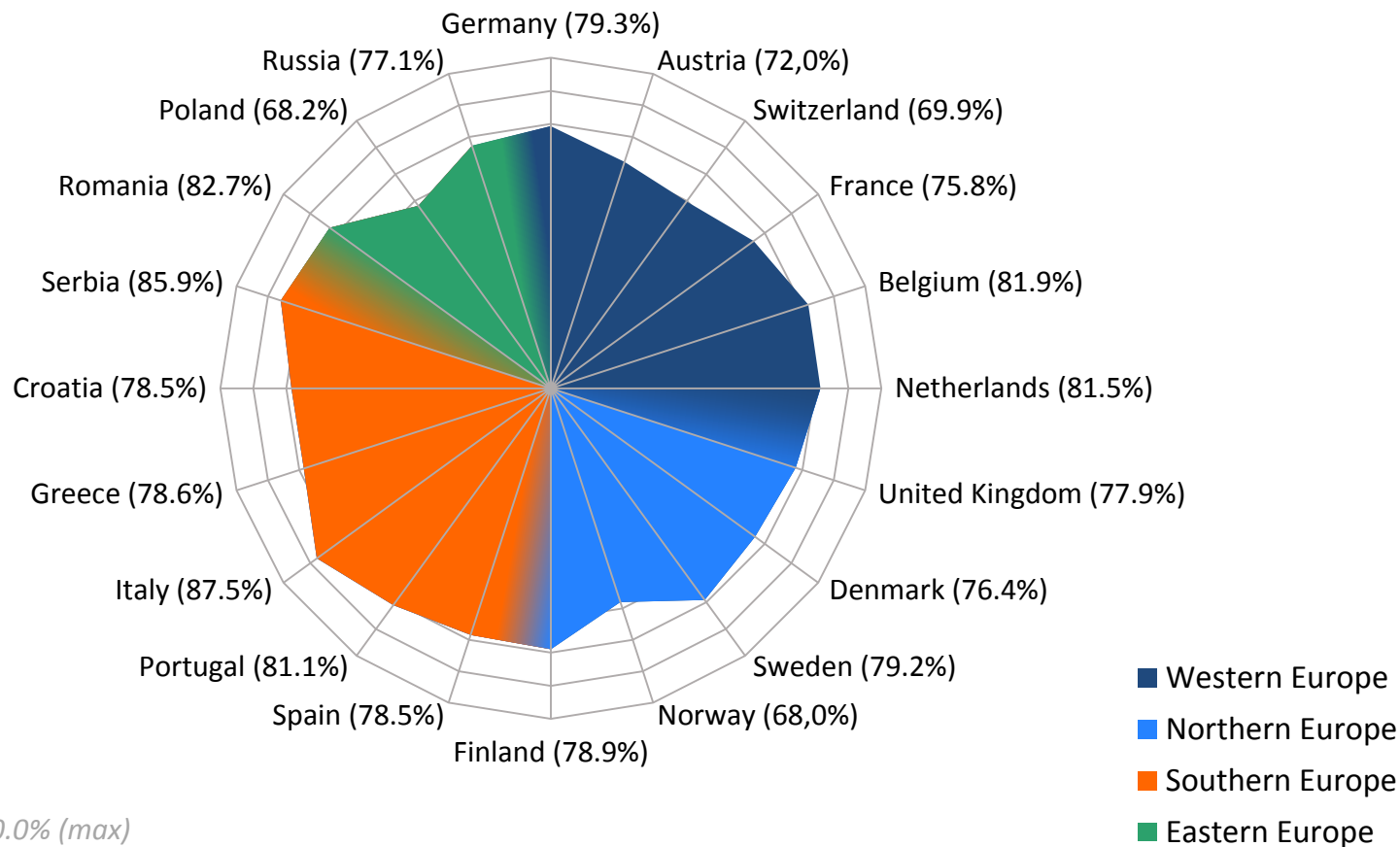
Important experiences to develop a profile and reach the current position



Most relevant aspects of career development for different age groups

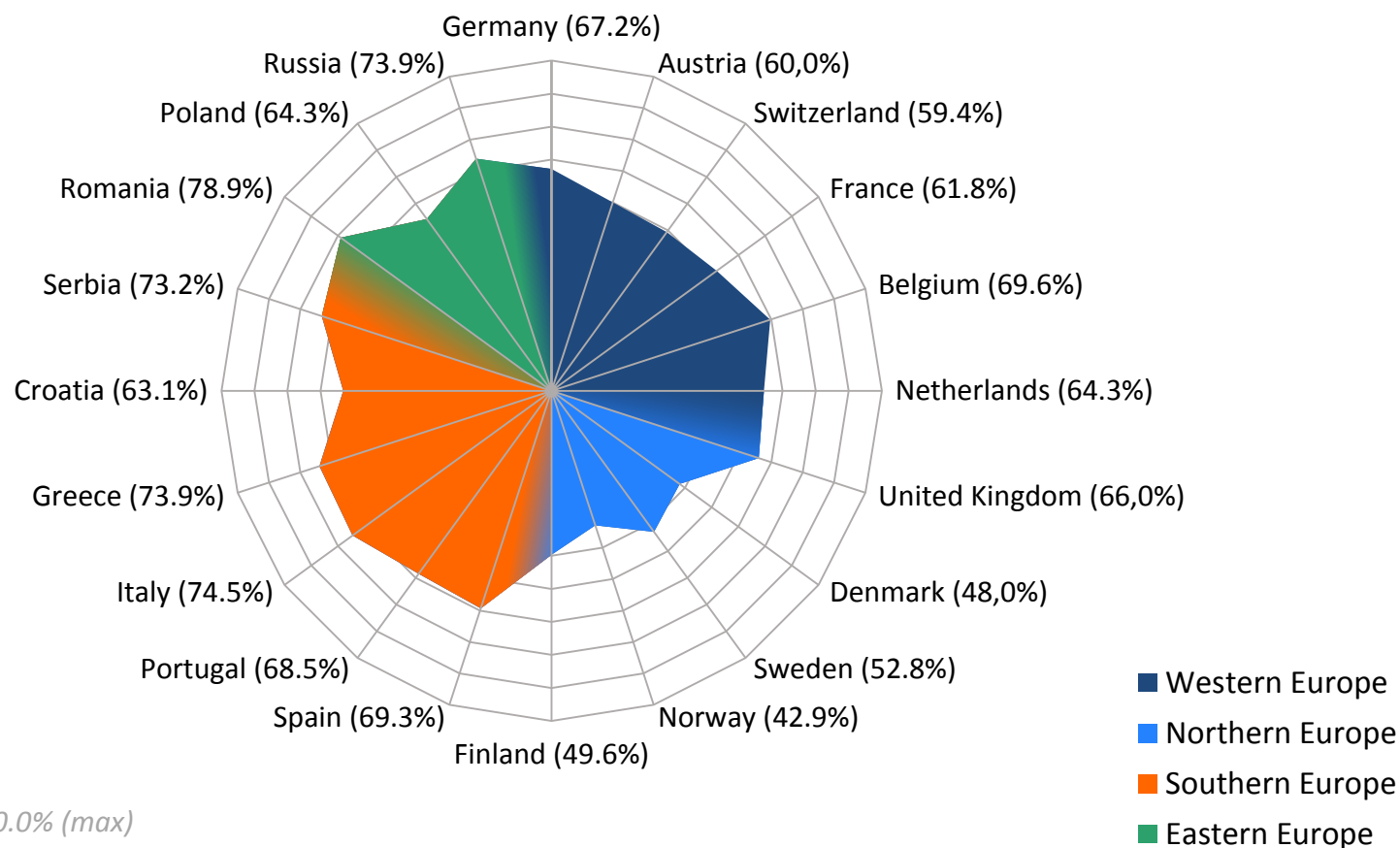
	29 or younger	30 - 39	40 - 49	50 - 59	60 or older	Overall
Networking among peers and colleagues	76.1%	77.9%	77.2%	82.3%	76.2%	78.1%
Further education (on/off the job)	67.1%	68.5%	71.1%	78.8%	76.8%	71.2%
Moving to a new employer **	57.5%	74.4%	72.1%	71.2%	64.0%	70.8%
Academic education (prior to the job)	68.7%	68.7%	67.0%	65.9%	65.7%	67.6%
Mentoring by senior colleagues *	67.5%	65.2%	62.3%	62.9%	66.7%	64.2%
Job rotation or new assignments within the same organisation	55.4%	59.3%	58.2%	57.9%	57.3%	58.2%
Internships (prior to the job) **	74.1%	55.6%	40.8%	44.6%	46.2%	51.2%

Networking as an important instrument for career development:
especially relevant in Southern Europe

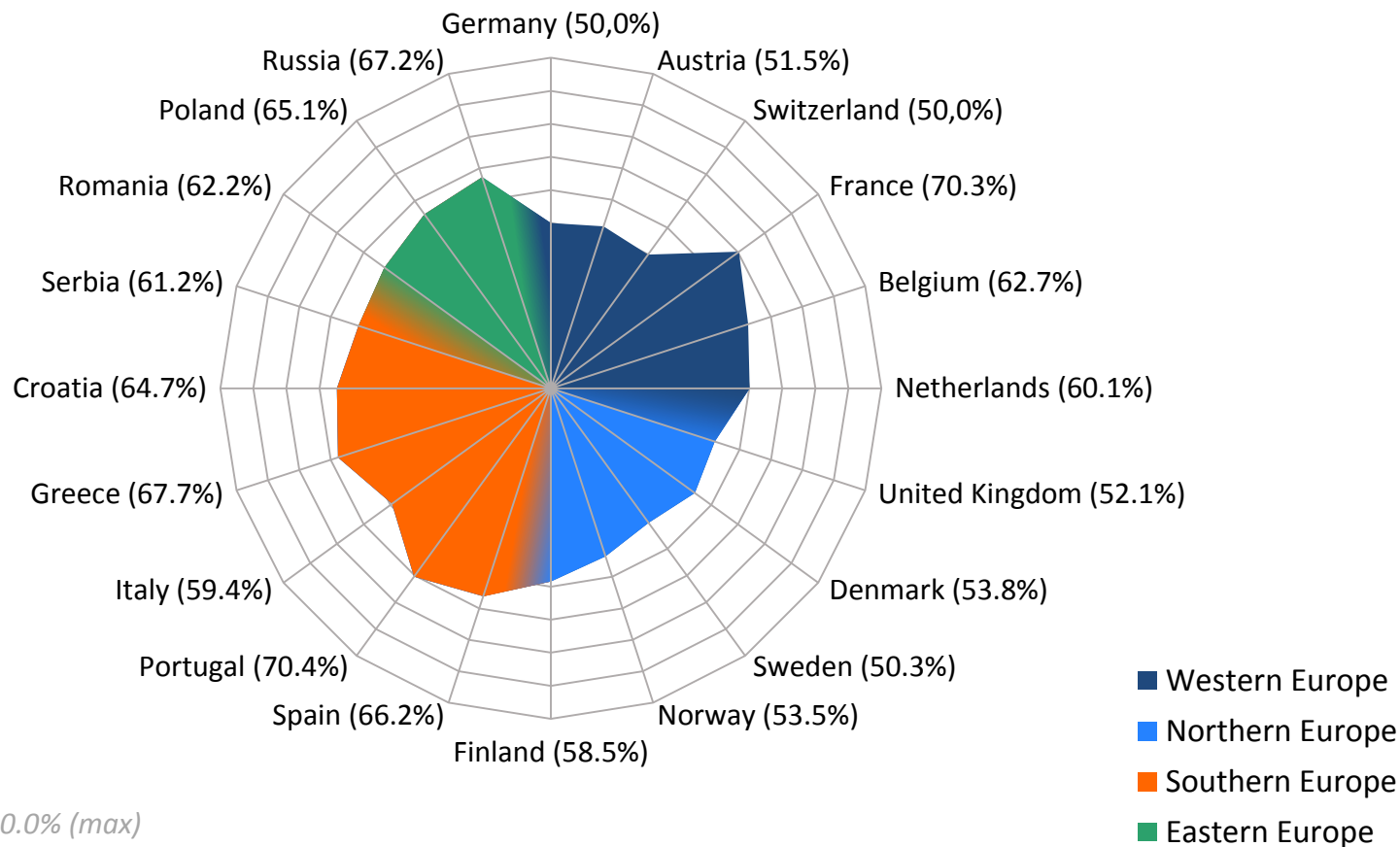


Scale: 0.0% (min.) – 100.0% (max)

Mentoring as an important measure for careers in communication: less prevalent in Northern Europe

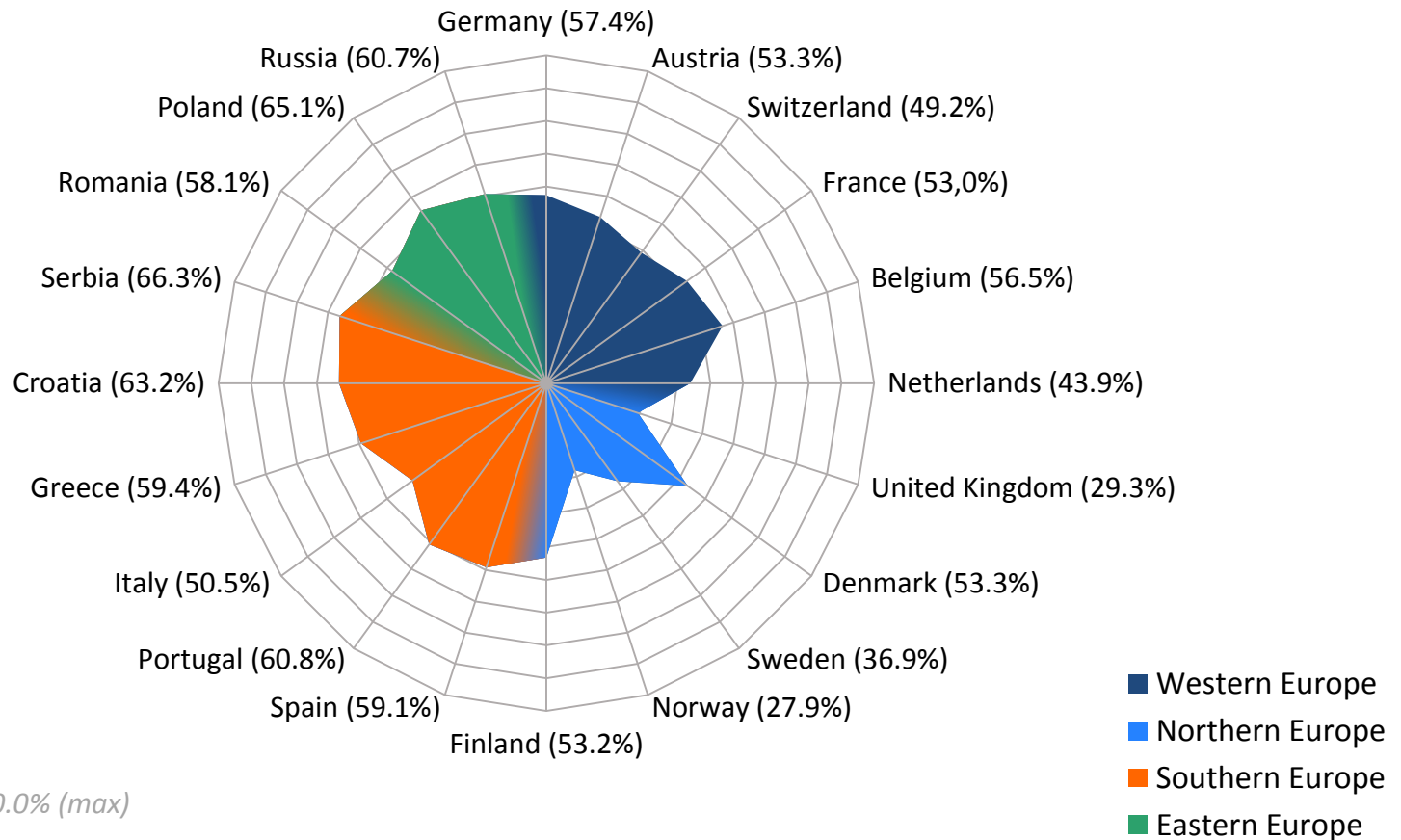


Job rotation is significantly more important in Eastern Europe, Southern Europe, and France, Belgium and the Netherlands



Scale: 0.0% (min.) – 100.0% (max)

Internships help to develop careers in communication – but they are less relevant in Norway, Sweden and the United Kingdom



Most relevant aspects of career development in communications across Europe

	Networking among peers and colleagues	Further education (on/off the job)	Moving to a new employer	Academic education (prior to the job)	Mentoring by senior colleagues	Job rotation within the same organisation **	Internships (prior to the job) **
Germany	79.3%	65.5%	62.9%	72.1%	67.2%	50.0%	57.4%
Austria	72.0%	83.2%	63.6%	68.5%	60.0%	51.5%	53.3%
Switzerland	69.9%	75.4%	67.2%	69.1%	59.4%	50.0%	49.2%
France	75.8%	58.7%	81.4%	60.6%	61.8%	70.3%	53.0%
Belgium	81.9%	63.0%	78.2%	67.0%	69.6%	62.7%	56.5%
Netherlands	81.5%	77.7%	78.1%	66.7%	64.3%	60.1%	43.9%
United Kingdom	77.9%	55.2%	81.1%	52.0%	66.0%	52.1%	29.3%
Denmark	76.4%	55.6%	70.0%	67.3%	48.0%	53.8%	53.3%
Sweden	79.2%	67.4%	78.6%	76.0%	52.8%	50.3%	36.9%
Norway	68.0%	52.7%	81.0%	75.2%	42.9%	53.5%	27.9%

www.communicationmonitor.eu / Zerfass et al. 2014 / n^{min} = 2,146 PR professionals from 20 countries. Q 4: When you look back at your career path in communications, which of the following measures were important to develop your profile and reach your current position? Scale 1 (Not important at all) – 5 (Very important). Percentages: Agreement based on scale points 4-5. ** Highly significant differences (chi-square test, $p \leq 0.01$, Cramér's V 'Internship' = 0.161, Cramér's V 'Job rotation' = 0.115).

Most relevant aspects of career development in communications across Europe

	Networking among peers and colleagues	Further education (on/off the job)	Moving to a new employer	Academic education (prior to the job)	Mentoring by senior colleagues	Job rotation within the same organisation **	Internships (prior to the job) **
Finland	78.9%	68.6%	76.8%	81.5%	49.6%	58.5%	53.2%
Spain	78.5%	79.5%	70.1%	73.5%	69.3%	66.2%	59.1%
Portugal	81.1%	85.5%	61.2%	79.7%	68.5%	70.4%	60.8%
Italy	87.5%	77.6%	67.0%	56.9%	74.5%	59.4%	50.5%
Greece	78.6%	87.7%	76.9%	79.5%	73.9%	67.7%	59.4%
Croatia	78.5%	80.9%	50.8%	69.6%	63.1%	64.7%	63.2%
Serbia	85.9%	80.5%	70.0%	63.7%	73.2%	61.2%	66.3%
Romania	82.7%	86.1%	74.1%	71.0%	78.9%	62.2%	58.1%
Poland	68.2%	67.8%	57.1%	57.3%	64.3%	65.1%	65.1%
Russia	77.1%	73.9%	65.7%	64.8%	73.9%	67.2%	60.7%

www.communicationmonitor.eu / Zerfass et al. 2014 / n^{min} = 2,146 PR professionals from 20 countries. Q 4: When you look back at your career path in communications, which of the following measures were important to develop your profile and reach your current position? Scale 1 (Not important at all) – 5 (Very important). Percentages: Agreement based on scale points 4-5. ** Highly significant differences (chi-square test, $p \leq 0.01$, Cramér's V 'Internship' = 0.161, Cramér's V 'Job rotation' = 0.115).

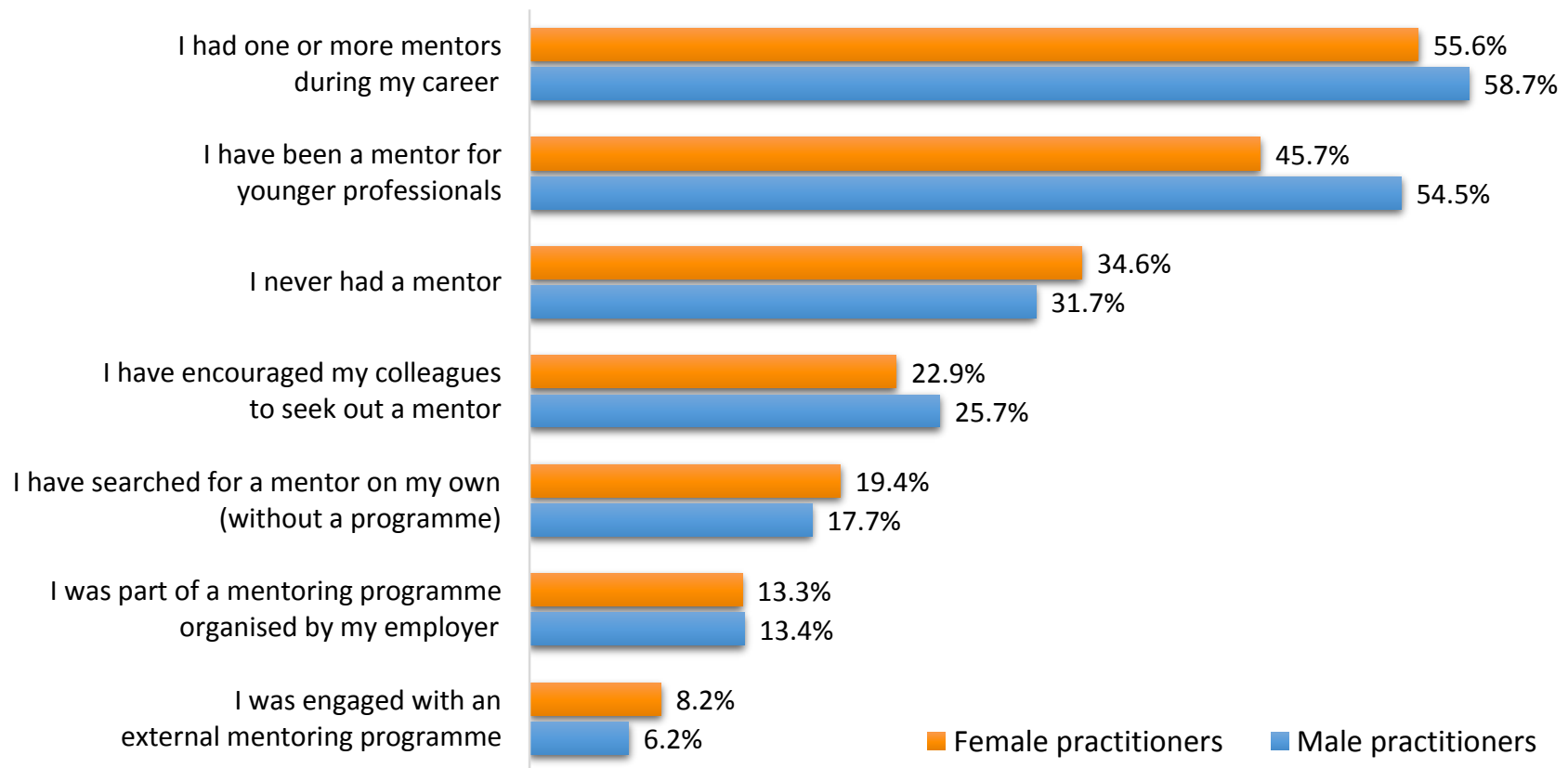
Mentoring in the communication profession

Experiences of communication professionals



Female communicators have been less involved in mentoring

Experiences of communication professionals



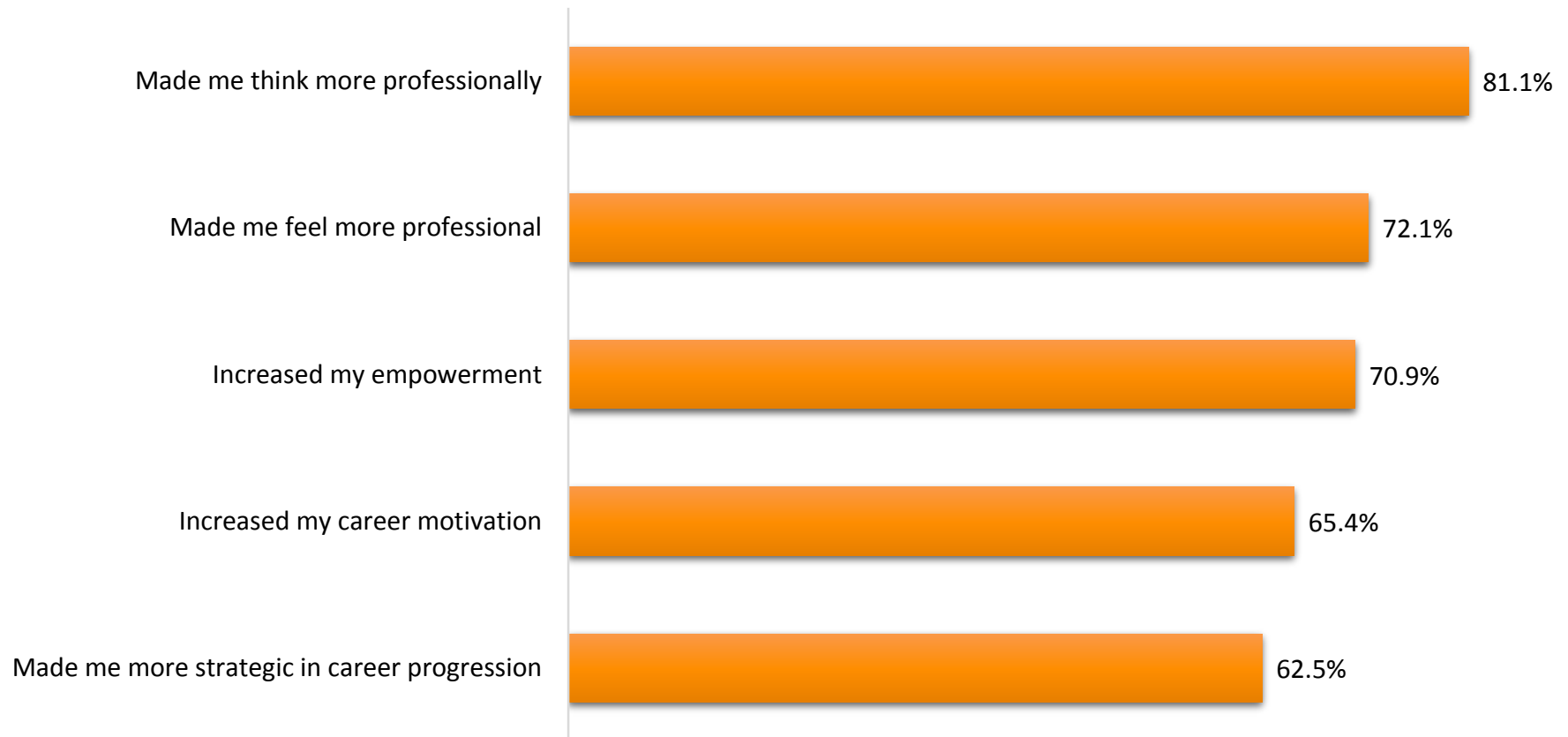
Mentors are role models regarding values and work ethics, and they help to define career strategies

Opportunities conveyed by most important mentor



Thinking more professionally is the major outcome of mentoring

Impact of most important mentor



Professionals who had been mentors, mentees or even both report significantly higher levels of job satisfaction

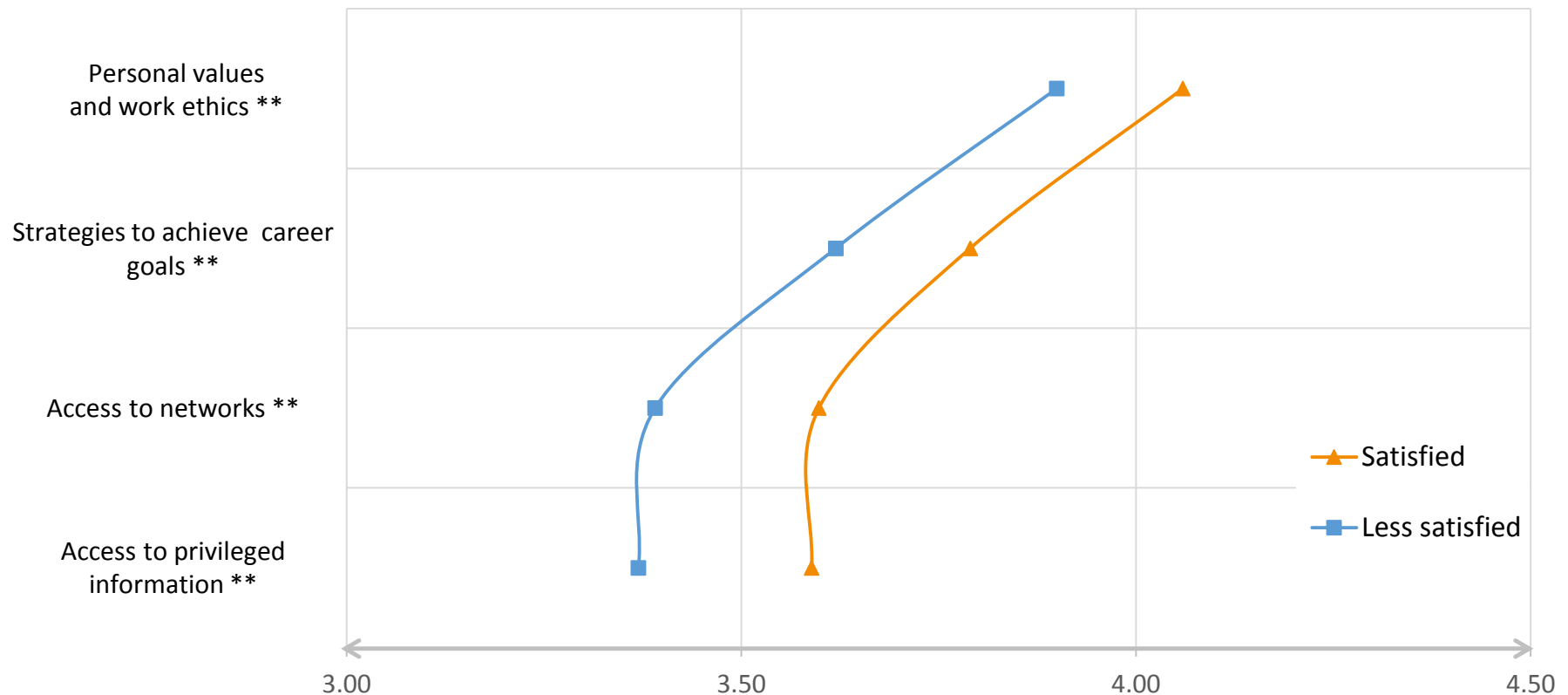
Overall job satisfaction



www.communicationmonitor.eu / Zerfass et al. 2014 / n = 1,050 PR professionals who had been both a mentor and a mentee / n = 313 PR professionals who had been a mentor only / n = 713 PR professionals who had been a mentee only / n = 701 PR professionals who have never been a mentor or a mentee. Respondents were filtered based on Q 9. Q 3: How do you feel about your actual job situation? Statement: Overall, I am satisfied with my job. Scale 1 (Strongly disagree) – 5 (Totally agree). Percentages: Agreement based on scale points 4-5. Significant differences (chi-square test, $p \leq 0.05$, Cramér's $V = 0.054$).

Mentees who received more support from mentors are more satisfied in their job

Opportunities conveyed by most important mentor



www.communicationmonitor.eu / Zerfass et al. 2014 / n = 1,763 PR professionals who had a mentor. Q 3: How do you feel about your actual job situation? Statement: Overall, I am satisfied with my job. Scale 1 (Strongly disagree) – 5 (Totally agree). Satisfied reported, based on scale points 4-5. Less satisfied reported, based on scale points 1-3. Q 10: Please rate the career opportunities which your most important mentor conveyed to you during your career. Scale 1 (Not at all) – 5 (Very much). Mean values. ** Highly significant differences (independent samples T-test, $p \leq 0.01$).

Networking practices and platforms



Chapter overview

Networks are relevant for communicators both in formal manifestations (via professional body membership, structured events and invitations to join organised networks) and in an informal nature (based on serendipity, irregular meetings, personal and professional activities and relationships). Linking with a theme discussed in the last chapter of this report, 82.5 per cent of respondents agreed that networking is important for career progression and personal development (Ghosh & Reio, 2013, p. 107). This supports previous claims that “having extended personalised networks of influence is an asset for a career conscious PR practitioner” (Valentini, 2010, p. 156). At the same time, 82.4 per cent saw networks as important for reaching business and communication goals of the organisation. There are clearly mixed motives behind many networking activities, which has to be considered when developing and evaluating appropriate strategies in practice.

Obviously, networking cannot be reduced to personal interactions in a world shaped by multiple stakeholder relationships and globalisation. Online media offer new opportunities. But concerns about privacy and information security have raised doubts about the suitability of those platforms in professional environments. The ECM 2014 addresses this issue and investigates communicators’ preferred forms of networking. Overall, e-mail is first choice, followed by social media and face-to-face interactions. However and supporting the literature, different types of networks are being used depending on age and gender. Female communicators identify e-mail as the most prevalent while their male counterparts also use e-mail but have higher responses than their female colleagues for face-to-face and use of the phone. Higher level managers prefer face-to-face networking. There are interesting differences in how networking practices are perceived. When compared with the phone and social media, face-to-face is seen as the most professional, trustworthy and productive form by the majority of respondents. The vast majority support face-to-face as generating trust (93.9 per cent) in network relationships, which is important and supports theoretical discussions of this key benefit of face-to-face networks (Giddens, 1991).

There are regional differences, too. Networking through social media is practiced most often in Finland, the United Kingdom, and Norway. E-mail is more relevant in parts of Eastern and Southern Europe (Russia, Croatia, Serbia, Spain) as well as in Belgium. Germans are significantly more geared to the phone than peers in other parts of Western and Northern Europe. While only 10.0 per cent of professionals use the phone as their premier networking tool, a clear majority states that using the phone is the most formal and time efficient form of networking.

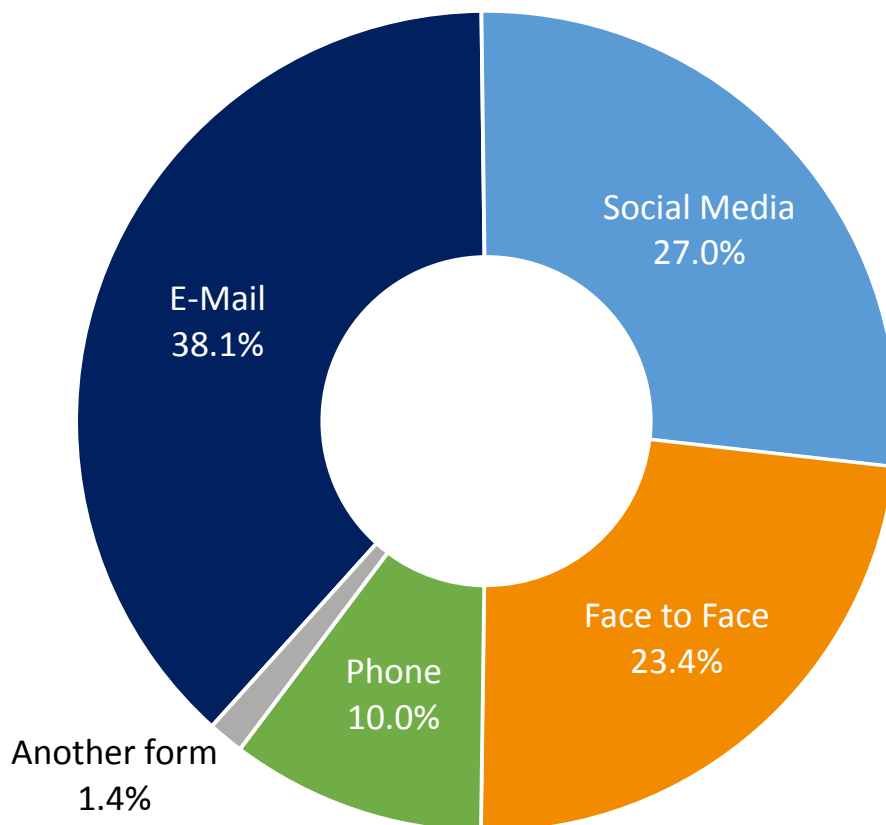
Facebook is often featured as a key social media tool when reaching out for stakeholders and public debates. However, this study reveals that other platforms are better suited for professional networking. Business communities such as LinkedIn, Xing or Viadeo are rated important by 72.7 per cent of the respondents. As much as 44.3 per cent believe that Twitter can be utilised, while less than a third (29.5 per cent) favour Facebook. However, there are highly significant age differences between the different tools. For example Facebook is preferred by younger practitioners while those in their thirties are more closely engaged with Twitter as a social media networking platform of choice.

Rationale and goals for networking in strategic communication

Importance of networking for ...



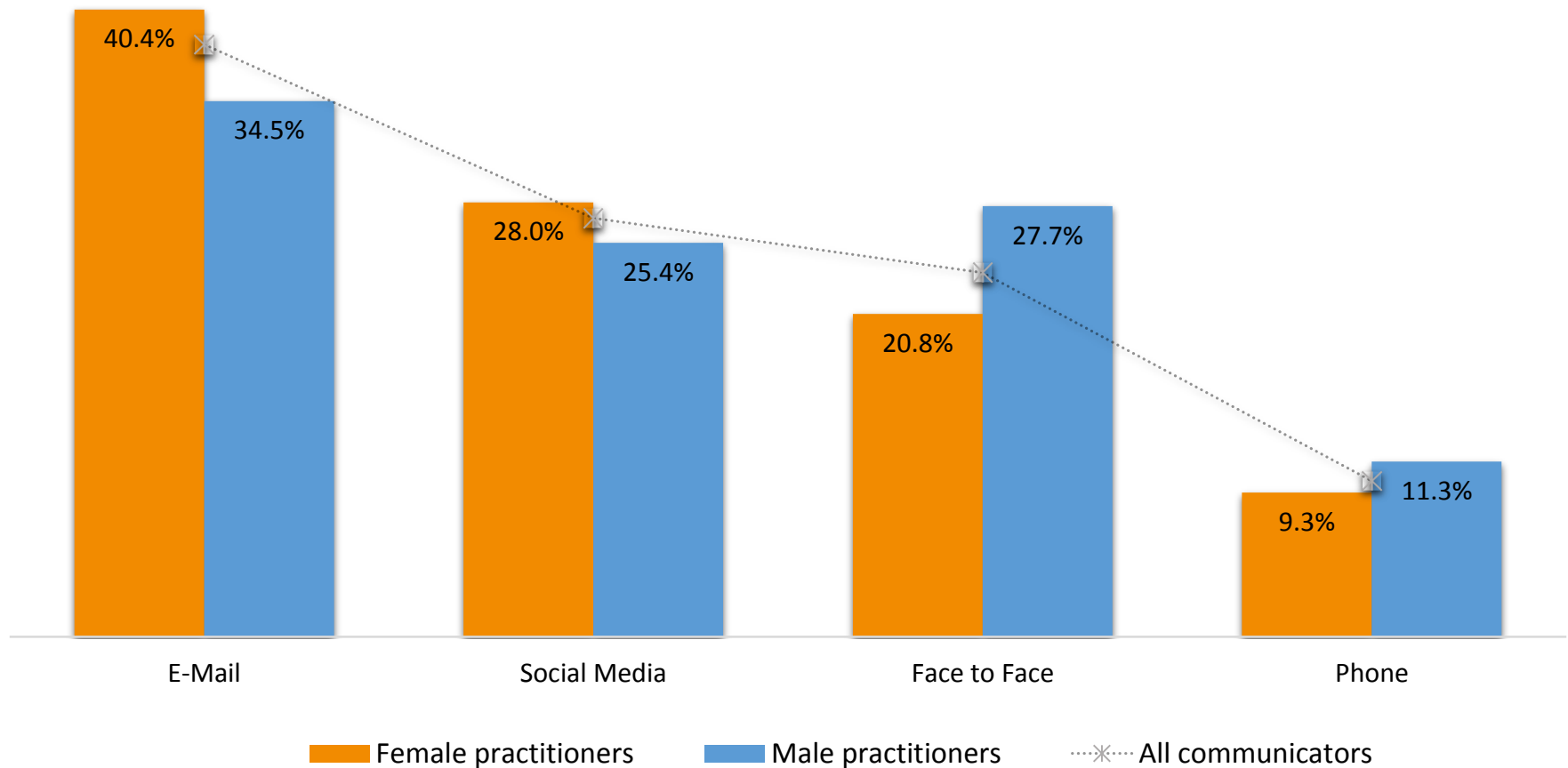
Preferred forms of professional networking by communication professionals



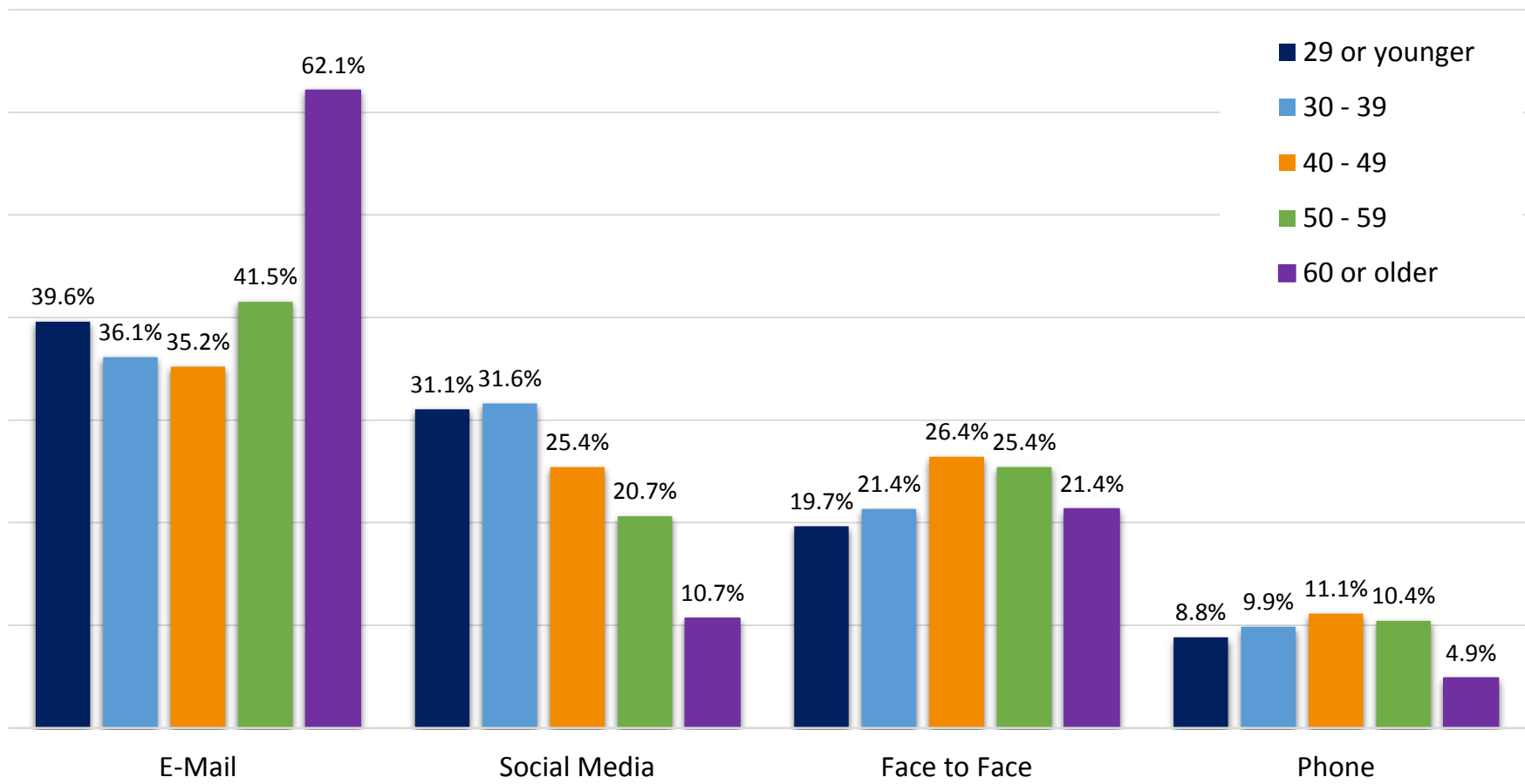
Most often used forms of networking: significantly different patterns across Europe

	E-Mail	Social Media	Face-to-face	Phone		E-Mail	Social Media	Face-to-face	Phone
Germany	37.3%	24.0%	23.5%	14.2%	Finland	38.4%	44.0%	13.8%	3.1%
Austria	36.5%	14.3%	34.9%	12.7%	Spain	41.9%	20.6%	22.1%	13.2%
Switzerland	38.6%	26.4%	26.4%	7.1%	Portugal	38.0%	30.4%	21.5%	10.1%
France	34.8%	18.2%	30.3%	12.1%	Italy	32.4%	24.3%	24.3%	17.1%
Belgium	41.2%	26.6%	26.0%	5.1%	Greece	39.7%	31.5%	11.0%	17.8%
Netherlands	36.1%	26.6%	27.2%	8.3%	Croatia	44.3%	28.6%	15.7%	10.0%
United Kingdom	33.5%	38.1%	19.4%	9.0%	Serbia	43.5%	20.7%	17.4%	18.5%
Denmark	30.4%	30.4%	25.0%	8.9%	Romania	37.6%	29.7%	16.8%	14.9%
Sweden	33.2%	31.6%	29.0%	4.1%	Poland	40.4%	24.7%	20.2%	12.4%
Norway	27.7%	36.9%	27.7%	6.2%	Russia	46.5%	18.3%	23.9%	11.3%

Male and female communicators report different networking behaviour

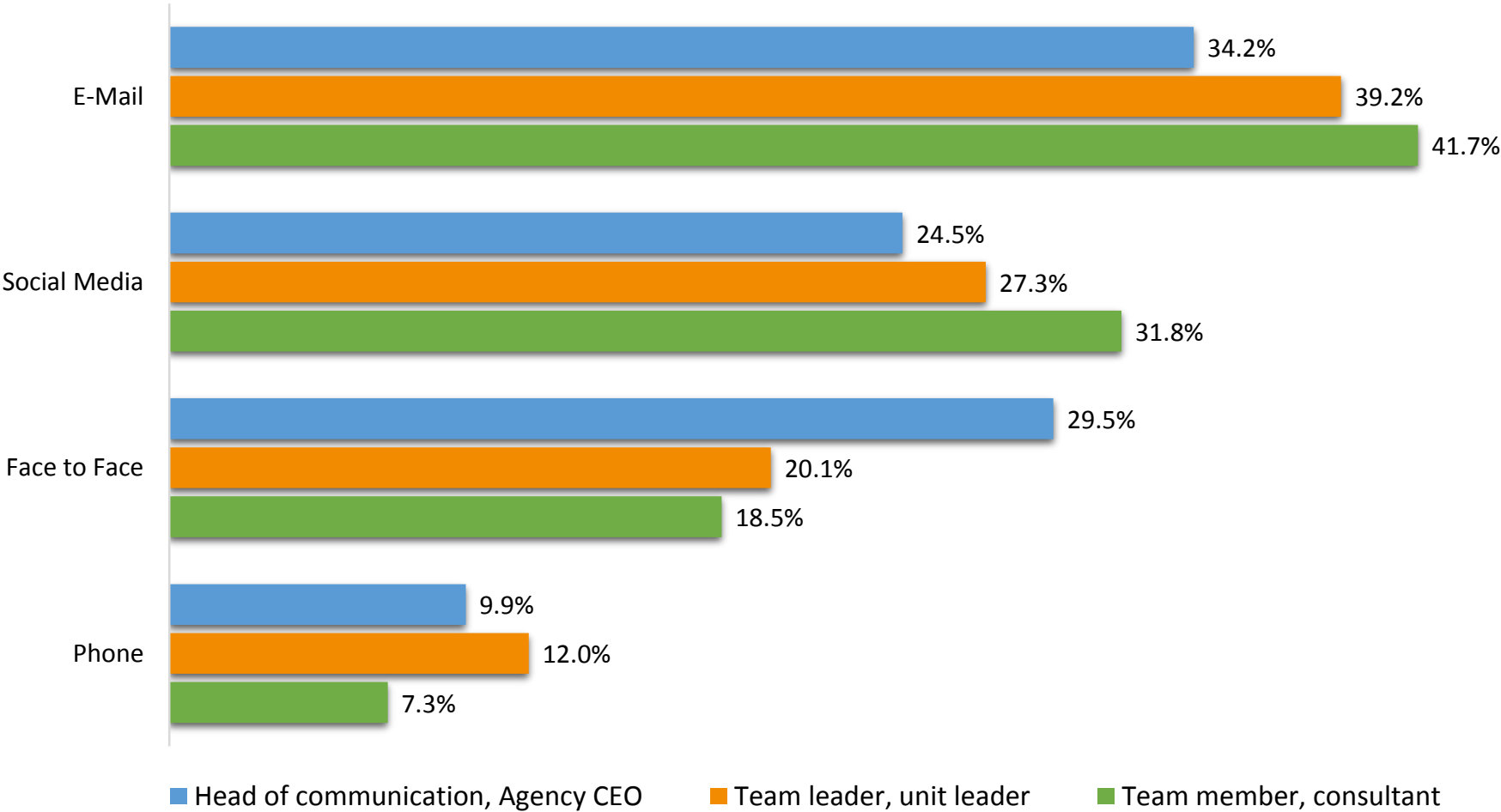


Networking practices in different age groups differ significantly



www.communicationmonitor.eu / Zeffass et al. 2014 / n = 2,738 PR professionals. Q 6: Which form of professional networking do you practice most often? Pick one or state another form. In a typical week, I use most of my networking time (on the) ... Highly significant differences for all items (chi-square test performed without "Another form", $p \leq 0.01$, Cramér's $V = 0.093$).

Top level communicators use face-to-face networking more often than colleagues on lower levels of the hierarchy

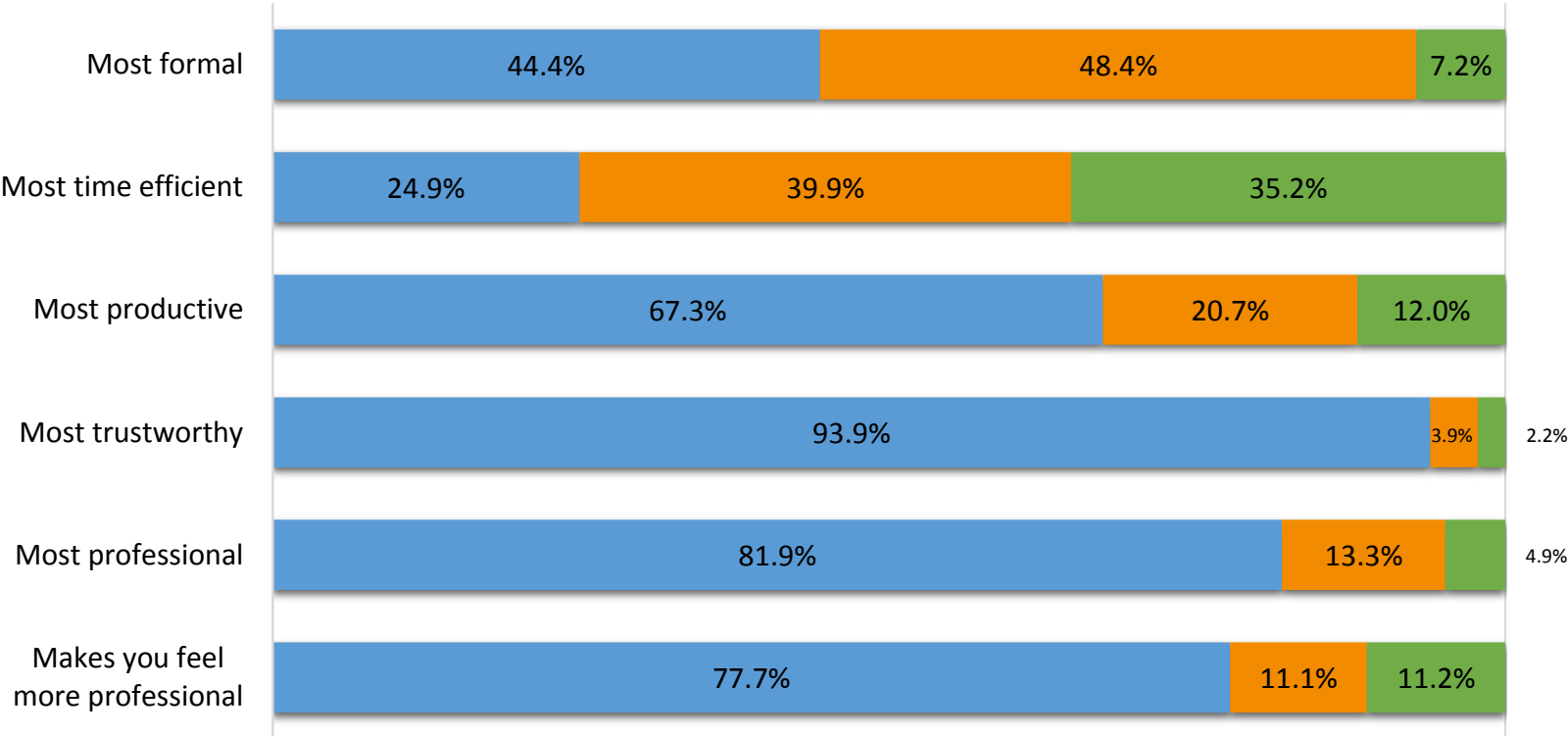


www.communicationmonitor.eu / Zerfass et al. 2014 / n = 2,566 PR professionals with a certain position. Q 6: Which form of professional networking do you practice most often? Pick one or state another form. In a typical week, I use most of my networking time (on the) ... Highly significant differences for all items (chi-square test performed without "Another form", $p \leq 0.01$, Cramér's $V = 0.101$).

Comparison of alternative networking practices for communicators

Attributes

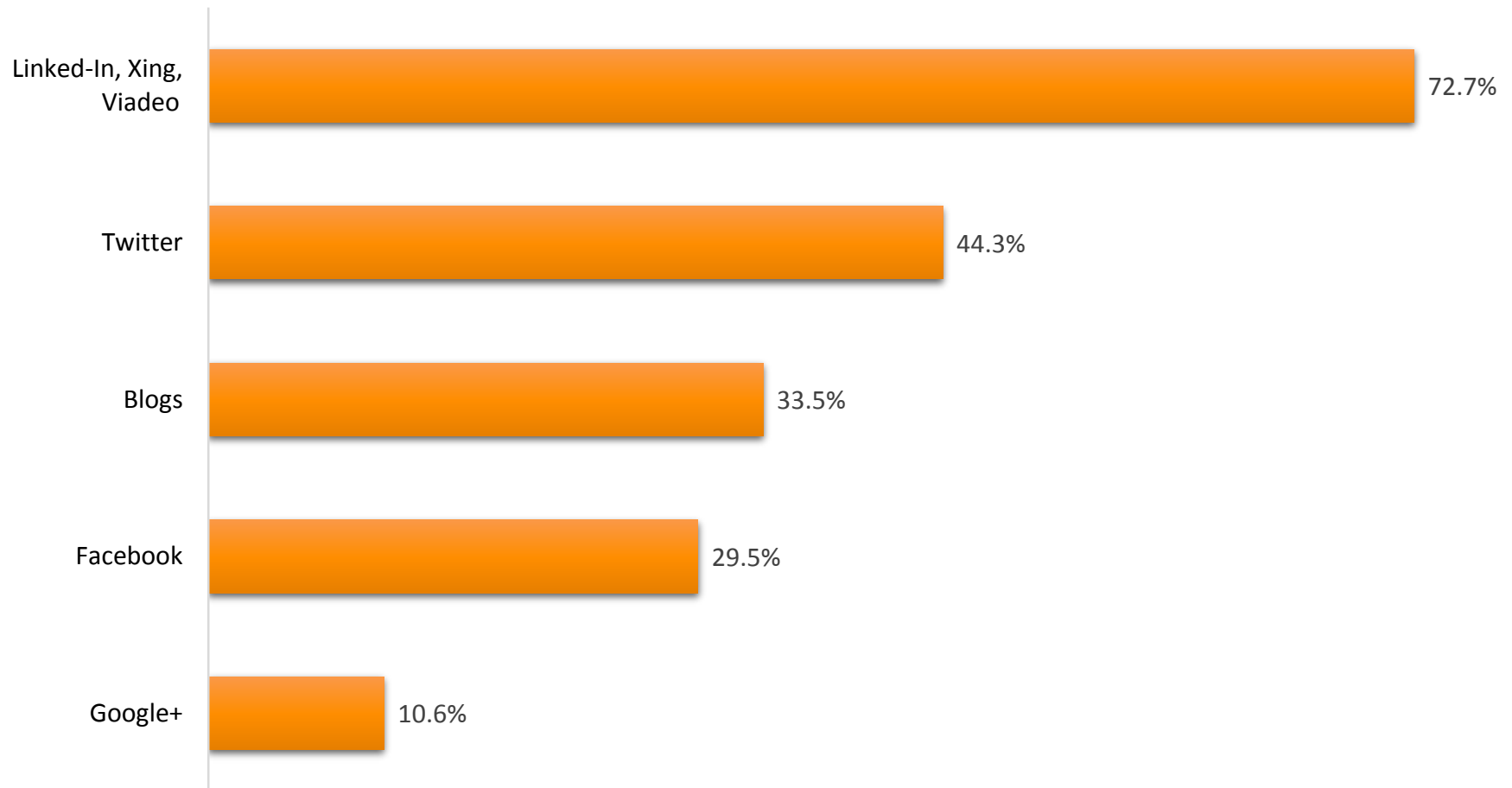
■ Face to Face ■ Phone ■ Social Media



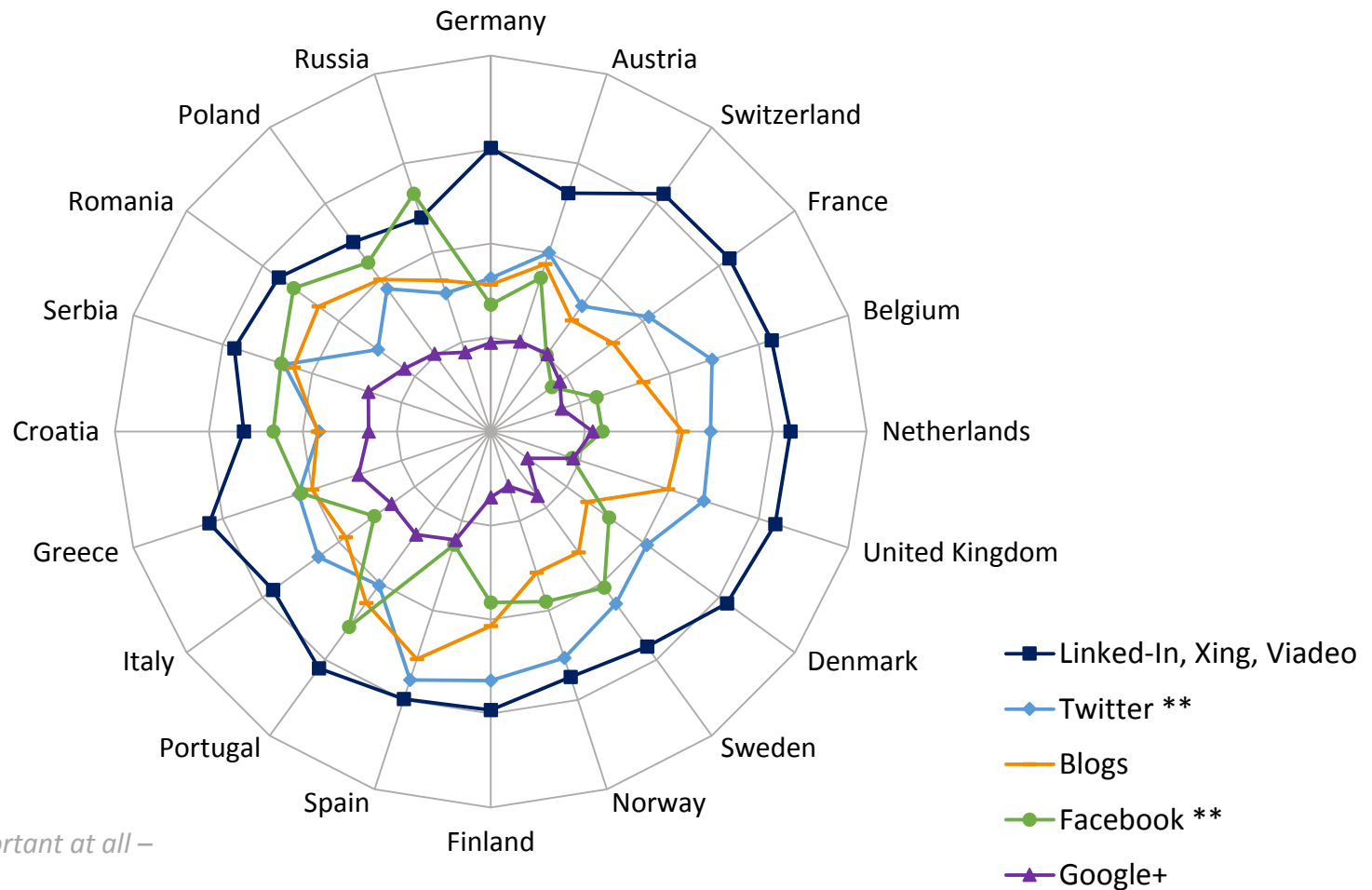
→ Statistical analysis identifies time efficiency as the key reason why communicators favour a specific form of networking

www.communicationmonitor.eu / Zerfass et al. 2014 / n = 2,777 PR professionals. Q 7: How would you compare face-to-face networking with using the telephone or social media? Choose one for each attribute. Highly significant correlations for Q 6 and Q 7 for the item “Most time efficient” (chi-square test, $p \leq 0.01$, Cramér's $V = 0.255$).

Importance of social media platforms for professional networking: business communities are leading the field way ahead of Facebook

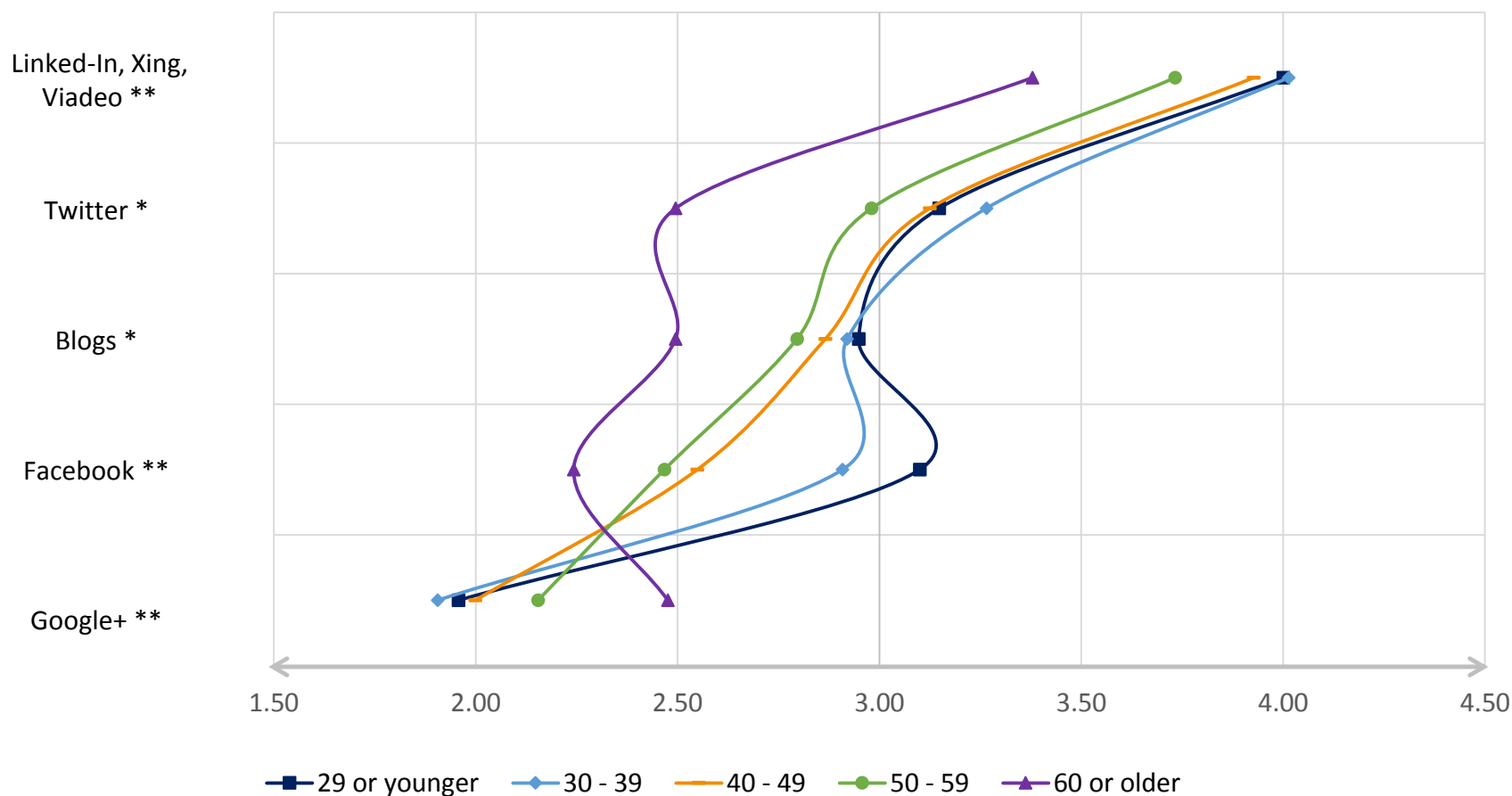


Communicators across Europe prefer different social media platforms for professional networking



Scale: (1.00) Not important at all –
(5.00) Very important

Facebook is important for younger communicators, while the thirties prefer Twitter significantly more than other age groups



**Communicating and
demonstrating leadership**



Chapter overview

Communication professionals value effective communication as a very important component of organisational and personal leadership (Berger & Meng, 2014; Meng & Berger, 2013). While this is seldom disputed, it is not clear at all which communication activities are suitable to influence stakeholder opinion on leadership. The large number of respondents in the ECM 2014 made it possible to explore this topic. According to the survey, personal speeches and appearances, company websites and interviews with TV and print media are most important. Social media tools are mentioned by a minority. The least effective tools for shaping organisational leadership among stakeholders are all forms of advertising.

There are notable differences in Europe about what attributes demonstrate organisational leadership. At the top of the overall list of such attributes for Europe as a whole are being trustworthy (named by 58.9 per cent of the respondents), innovative (51.5 per cent), and providing quality products or services (50.3 per cent). In Northern and Western Europe, with a remarkable exception of France, trustworthiness is perceived as the most important aspect which has to be demonstrated by organisations which want to be considered a leader. An interesting guest member to this group is Croatia with above-average scores for this attribute. But in most Eastern European countries the most relevant aspect to be considered when communicating leadership is product and service quality. A group of their own is formed by three countries in which communication professionals see innovation at the core of the leadership communication strategies: France (69.7 per cent), Italy (68.5 per cent) and Spain (61.8 per cent). Perception building is clearly a cultural practice, and communicators have to be aware of these differences. They will be even more prevalent when planning strategies on a global scale.

The survey has asked a similar question about profiling leaders, which is a major part of CEO communication (Zerfass et al., 2014b). Personal characteristics and behaviours to be demonstrated by effective leaders are communicating in an open and transparent way, providing a clear overall and long-term vision, handling controversial issues or crises calmly, and leading by example. All of these statements are supported by nine out of ten respondents and based on their experiences and insights.

What is also deserving attention from the data are organisational and personal attributes that were placed at the bottom of these two lists. The least important organisational aspects for demonstrating leadership are environmental responsibility, promoting diversity, and philanthropic or charitable donations. At the bottom of the list of personal characteristics or behaviours of effective leaders are: showing respect for the organisation's history and culture, taking active steps to ensure diversity in the organisation, and using inspirational rhetoric. And while there are noticeable and statistically significant differences in the value placed on dimensions of leadership between male and female respondents, this difference is the biggest on the dimension of diversity – which received by far the lowest support among all items by male respondents.

The reduced importance of corporate social responsibility, sustainability and diversity seems surprising when considering the challenges Europe faces. However the last section of this report demonstrates that there are significant differences regarding some of these dimensions when comparing outstanding, excellent and professional communication functions with the majority in the field.

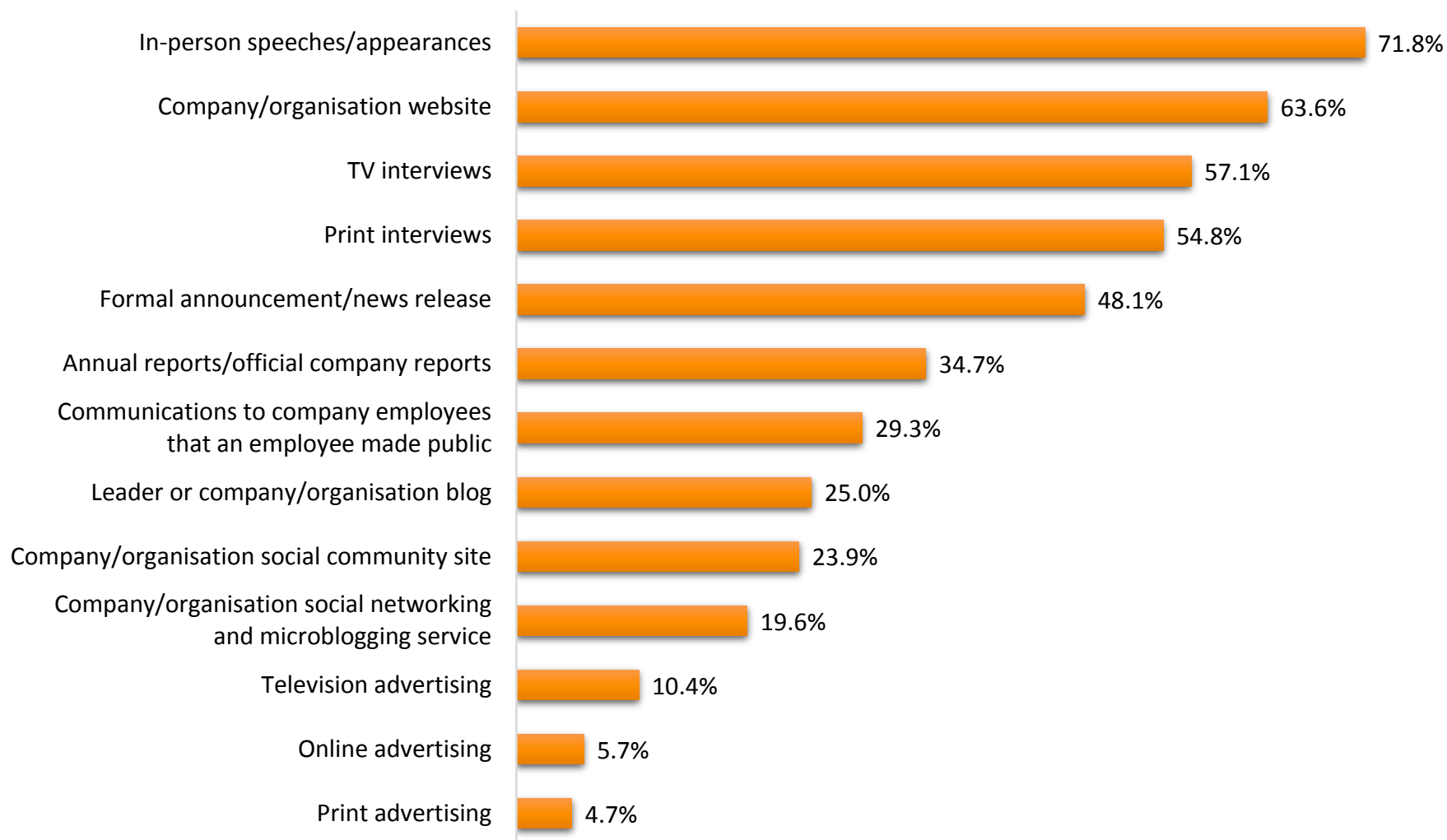
Impact of communication on leadership

88.3%

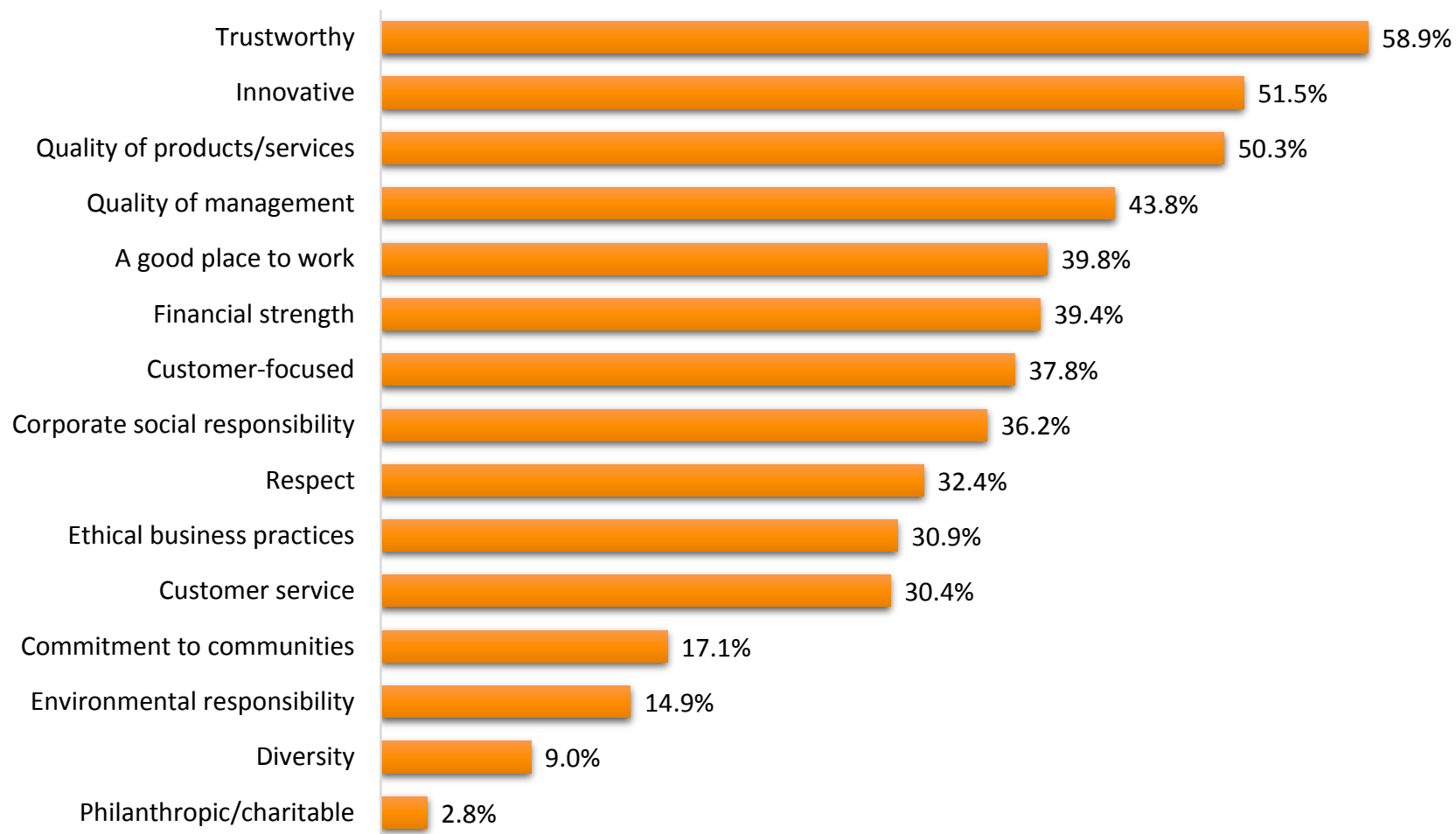
of all communication professionals
rate effective communication as
very important for great leadership

<i>Professionals working in ...</i>	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations	Consultancies and agencies
<i>Rating communication very important</i>	89.2%	87.2%	89.4%	89.9%	86.3%

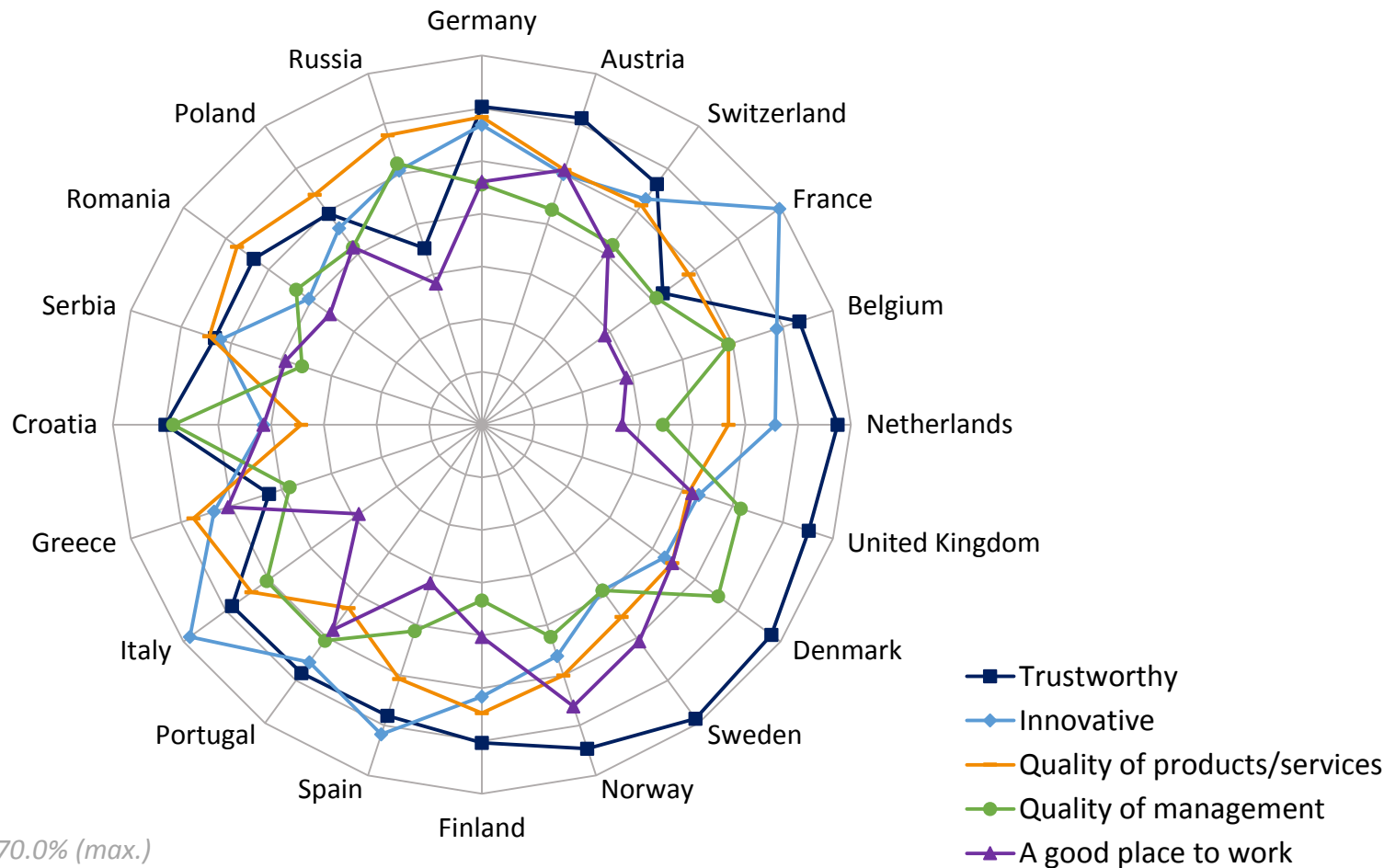
Impact of various communication activities on public opinion about leadership



Most important organisational attributes for demonstrating leadership



Important attributes of organisational leadership in different countries



Scale: 0.0% (min.) – 70.0% (max.)

Country-to-country analysis: important attributes of organisational leadership

	Trustworthy	Innovative	Quality of products/ services	Quality of management	A good place to work	Financial strength	Customer-focused	Corporate social responsibility
Germany	60.3%	56.9%	58.3%	45.6%	46.1%	42.6%	37.3%	26.5%
Austria	61.1%	50.0%	50.8%	42.9%	50.8%	44.4%	30.2%	34.9%
Switzerland	56.4%	52.9%	51.4%	42.1%	40.7%	42.9%	37.9%	35.0%
France	42.4%	69.7%	48.5%	40.9%	28.8%	45.5%	42.4%	43.9%
Belgium	63.3%	58.8%	49.2%	49.2%	28.8%	33.3%	39.0%	36.2%
Netherlands	67.5%	55.6%	46.7%	34.3%	26.6%	36.1%	45.6%	45.0%
United Kingdom	65.2%	43.2%	41.3%	51.6%	41.9%	40.0%	48.4%	27.7%
Denmark	67.9%	42.9%	44.6%	55.4%	44.6%	55.4%	46.4%	23.2%
Sweden	68.9%	38.9%	45.1%	38.9%	50.8%	21.8%	41.5%	42.5%
Norway	64.6%	46.2%	50.0%	42.3%	56.2%	27.7%	40.8%	32.3%

Country-to-country analysis: important attributes of organisational leadership

	Trustworthy	Innovative	Quality products/ services	Quality of management	A good place to work	Financial strength	Customer-focused	Corporate social responsibility
Finland	60.4%	51.6%	54.7%	33.3%	40.3%	46.5%	49.7%	33.3%
Spain	58.1%	61.8%	50.7%	41.2%	31.6%	42.6%	42.6%	50.0%
Portugal	58.2%	55.7%	43.0%	50.6%	48.1%	39.2%	29.1%	38.0%
Italy	58.6%	68.5%	54.1%	50.5%	28.8%	36.9%	32.4%	36.0%
Greece	42.5%	53.4%	57.5%	38.4%	50.7%	54.8%	31.5%	47.9%
Croatia	60.0%	41.4%	34.3%	58.6%	41.4%	34.3%	25.7%	42.9%
Serbia	53.3%	52.2%	54.3%	35.9%	39.1%	41.3%	26.1%	38.0%
Romania	53.5%	40.6%	57.4%	43.6%	35.6%	33.7%	24.8%	41.6%
Poland	49.4%	46.1%	53.9%	41.6%	41.6%	43.8%	38.2%	18.0%
Russia	35.2%	50.7%	57.7%	52.1%	28.2%	64.8%	49.3%	28.2%

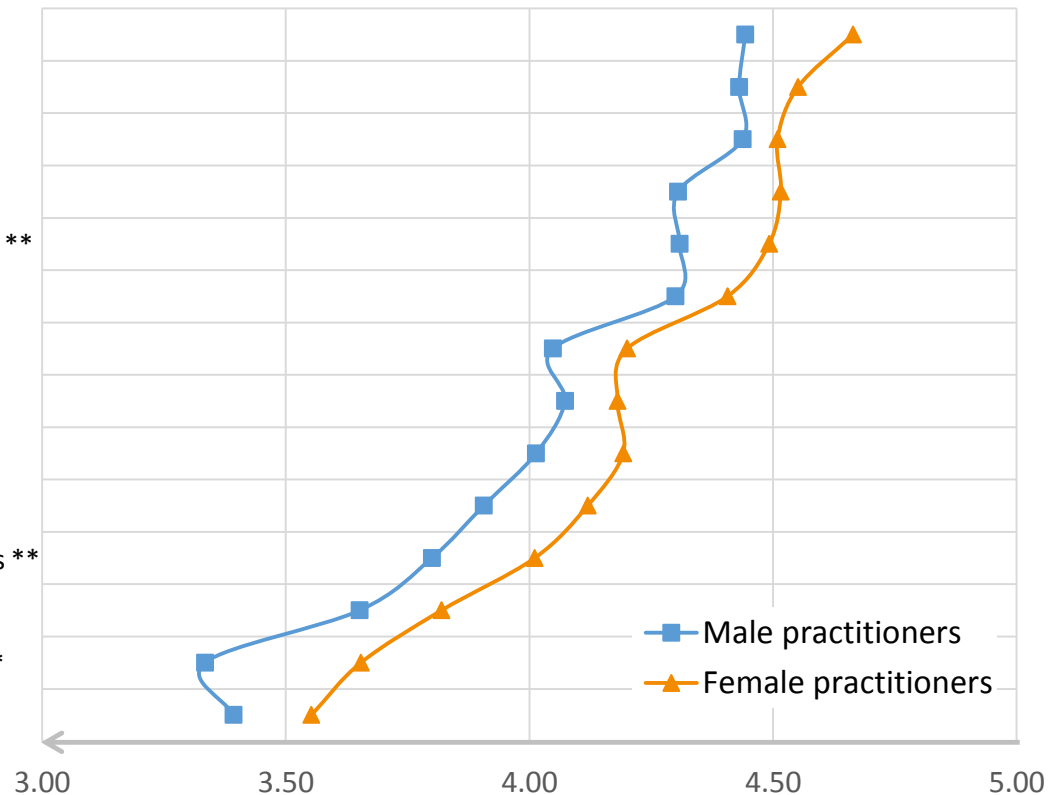
Characteristics of effective leaders

Important characteristics or behaviours to be demonstrated by effective leaders



Male and female communication professionals have significant differences in expectations of effective leadership

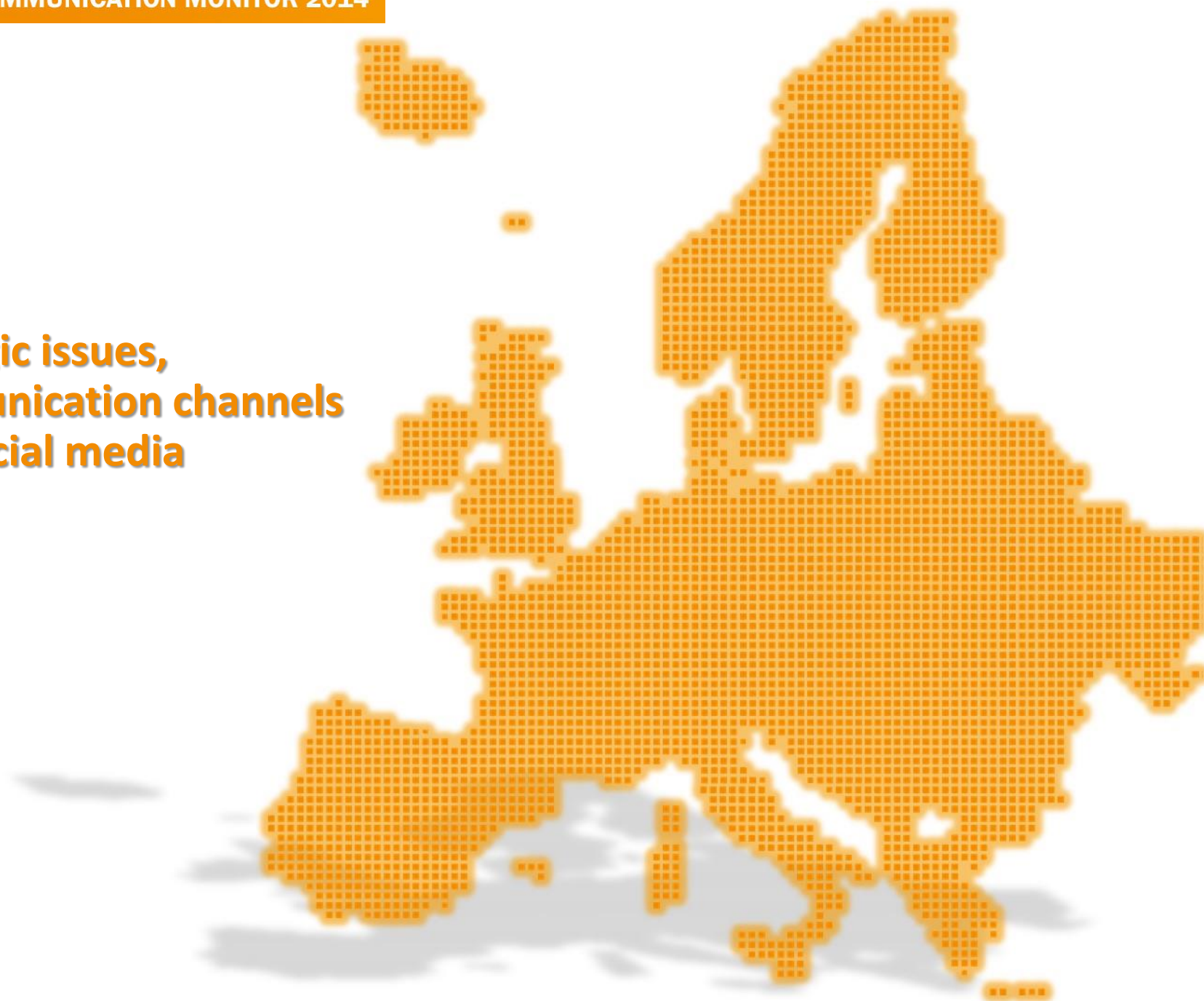
- Communicating in an open and transparent way **
- Providing a clear overall, long-term vision **
- Leading by example *
- Aligning what is said and done **
- Handling controversial issues or crises calmly and confidently **
- Bringing out the best in others **
- Admitting mistakes **
- Making tough decisions **
- Telling a compelling, easily understandable story **
- Showing respect for different cultures **
- Demonstrating ability to work with different personality styles **
- Showing respect for the organisation's history and culture **
- Taking active steps to ensure diversity in their organisation **
- Using inspirational rhetoric **



www.communicationmonitor.eu / Zerfass et al. 2014 / $n^{\min} = 2,695$ PR professionals. Q 15: Listed below are specific behaviours often seen as being characteristic of effective leaders. When it comes to being an effective leader, how important is it to demonstrate each of the following characteristics or behaviours? Scale 1 (Not at all important) – 5 (Very important). Mean values. * Significant differences (independent samples T-test, $p \leq 0.05$).

** Highly significant differences (independent samples T-test, $p \leq 0.01$).

**Strategic issues,
communication channels
and social media**



Chapter overview

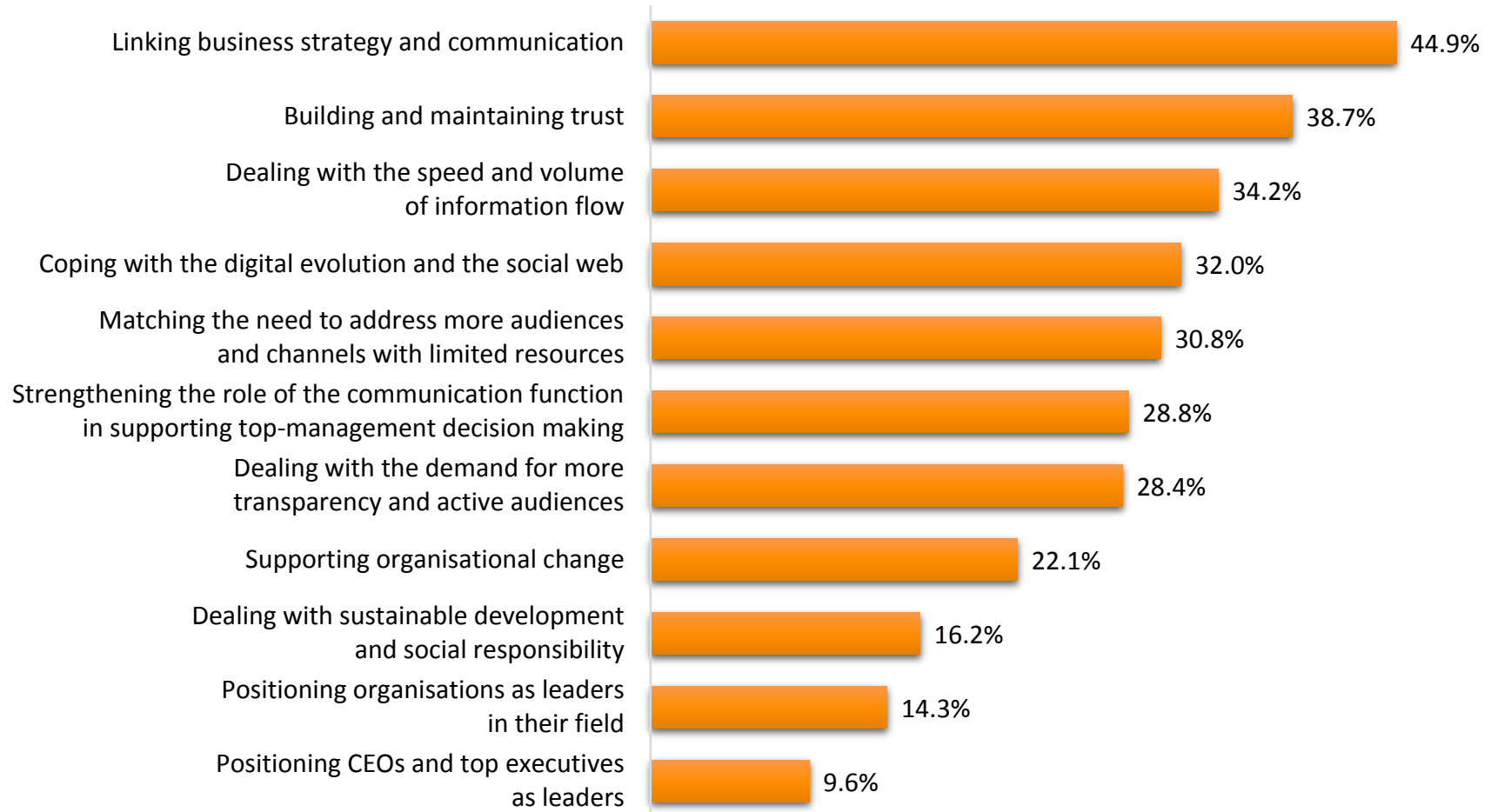
Unlike in previous years, one topic is clearly heading the list of most important challenges for communication management within the next three years. Nearly half of the 2,777 respondents in the ECM 2014 survey (44.9 per cent) stated that the profession has to tackle the ongoing challenge of linking communication and business strategies. The profession is striving 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; Grunig, 2006; Verčič & Grunig, 2002). Unlike last year, only one third of the professionals interviewed (32.0 per cent) believe that coping with the digital evolution and the social web is one of the top challenges. This number has declined sharply from 41.8 per cent. It looks like many questions have been answered; the novelty and hype are over.

In a longitudinal perspective, building and maintaining trust was rated the fourth important challenge for strategic communication from 2008 to 2011, the third in 2012 and 2013, and it came to the second position this year. This reflects the importance of key concepts and goals of communication in a rapidly changing world. The most interesting trajectory involves the issue of dealing with sustainable development and social responsibility. This much-debated field (Ihlen et al., 2011; Tench et al., 2014) started as second in the list of most important issues for communications in 2008, fell to the third place already one year later, just to sink further down in 2012 and 2013. This year, practitioners rated it in the ninth place with only 16.2 per cent picking this topic. These results signal that professionals have learnt how to deal with the challenges, or that normative exaggerations have now been replaced.

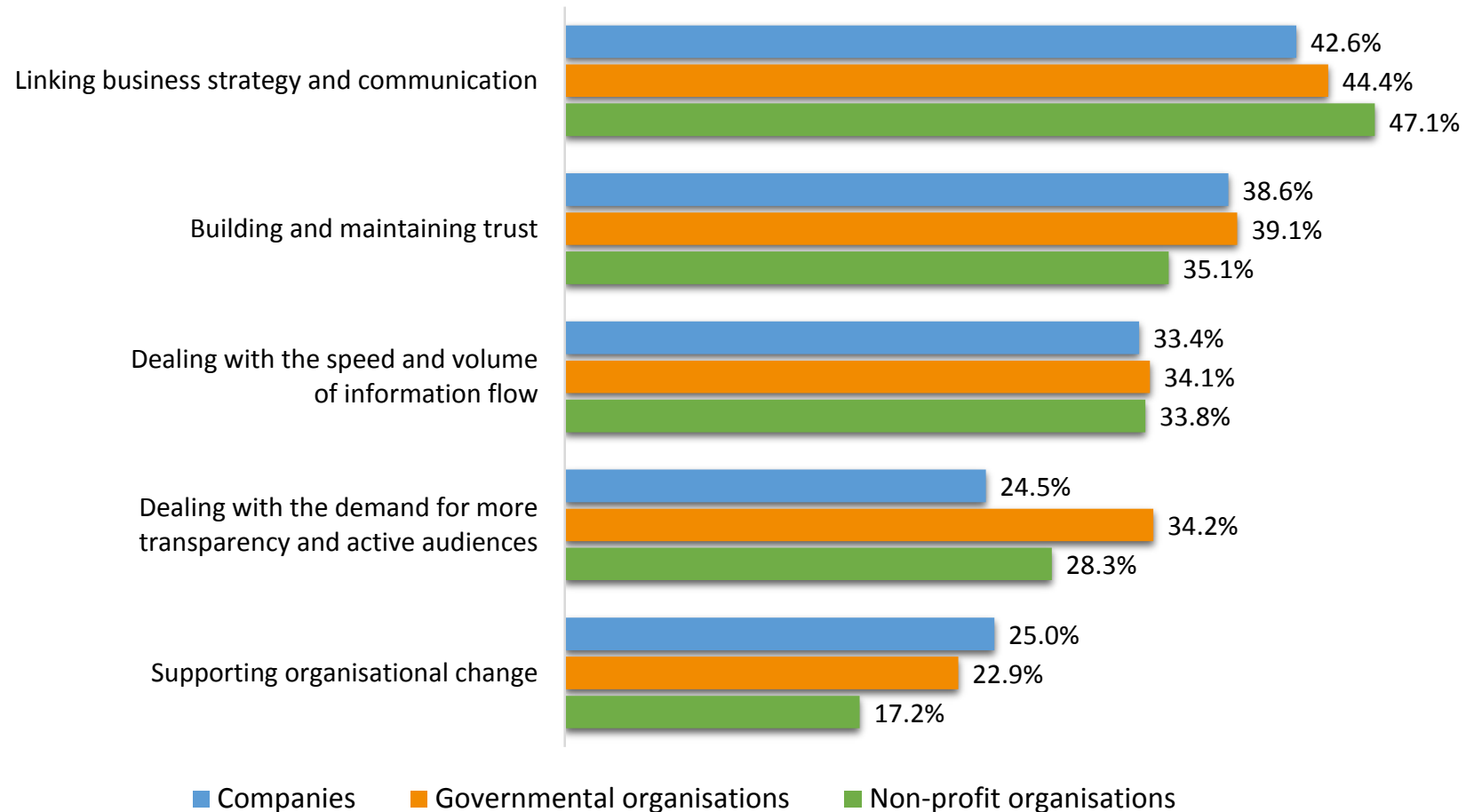
The dynamics of the field are also visible when exploring the importance of various channels and instruments in strategic communication. Online communication is clearly leading this list (rated important by 85.9 per cent), with face-to-face communication (81.0 per cent) and media relations addressing online media (79.0 per cent) just behind. However, the latter is supposed to increase in relevance during the next years, as is online communication itself, while face-to-face will stay at the same level. The survey suggests a dramatic loss of importance for traditional press relations interacting with print media. Only 41.8 per cent of the respondents believe such activities will be important in 2017, which is far less than today (76.3 per cent) and a strong decline since 2011 and 2008, when this has been the most important of all instruments (Zerfass et al., 2008, 2011). On the contrary, mobile communication will see the strongest rise within the near future.

An interesting picture emerges when turning the perspective and asking not for organisational activities, but for the expectations of stakeholders in the realm of social media communications. According to the communicators in the sample, stakeholders expect organisations to provide real-time information on events or crises on social platforms, to inform about current or forthcoming products or services, and to discuss corporate social responsibility activities. The key terms on social media are interaction, joint experiences, and feedback. One could conclude that the power is equalising between organisations on one side and their stakeholders on the other. But the decline of journalism and other independent intermediaries also support another interpretation. Probably the levelling of the playing field is not so much a sign of more dialogic times, but of a new asymmetry between communicating parties.

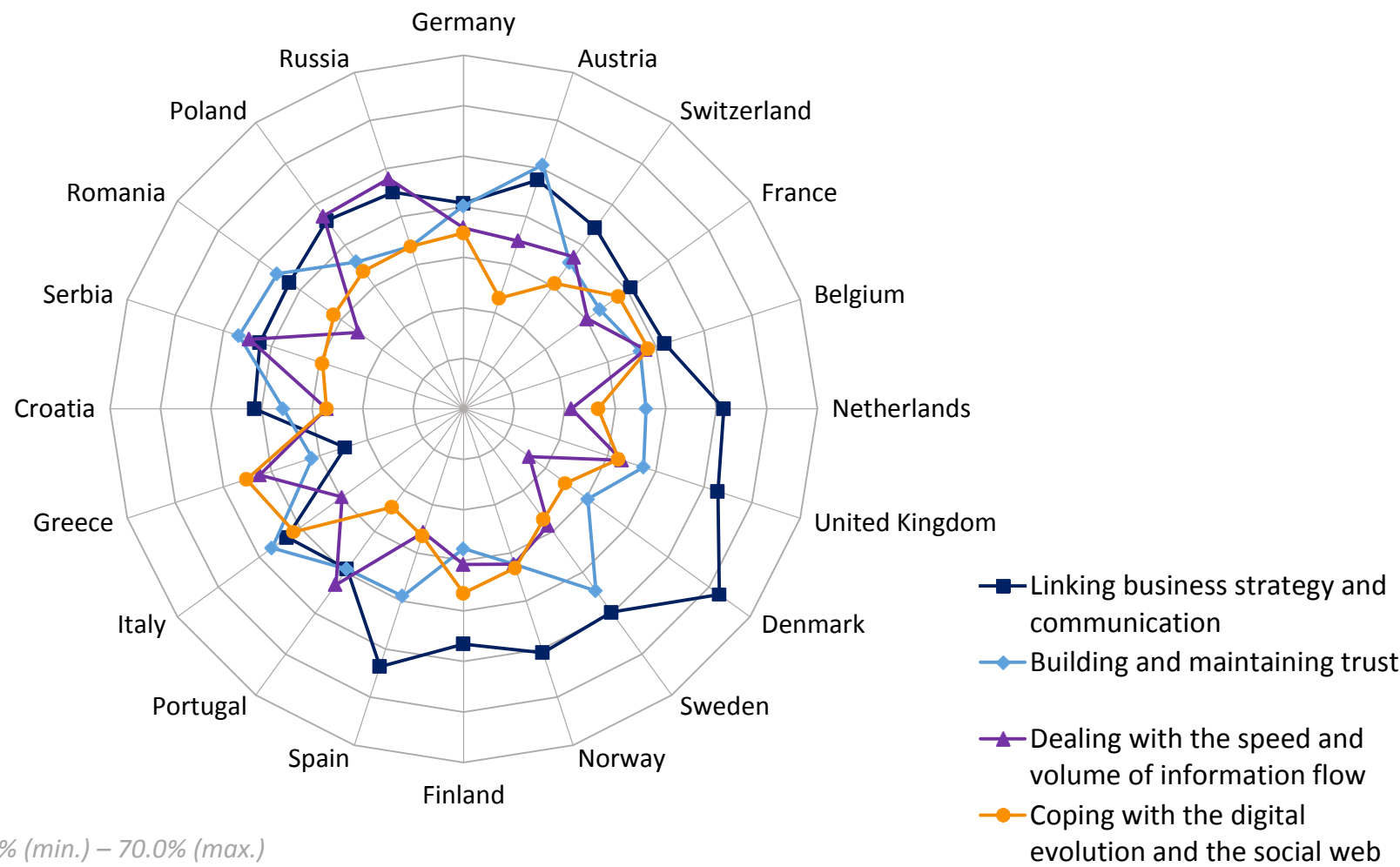
Most important issues for communication management in Europe until 2017



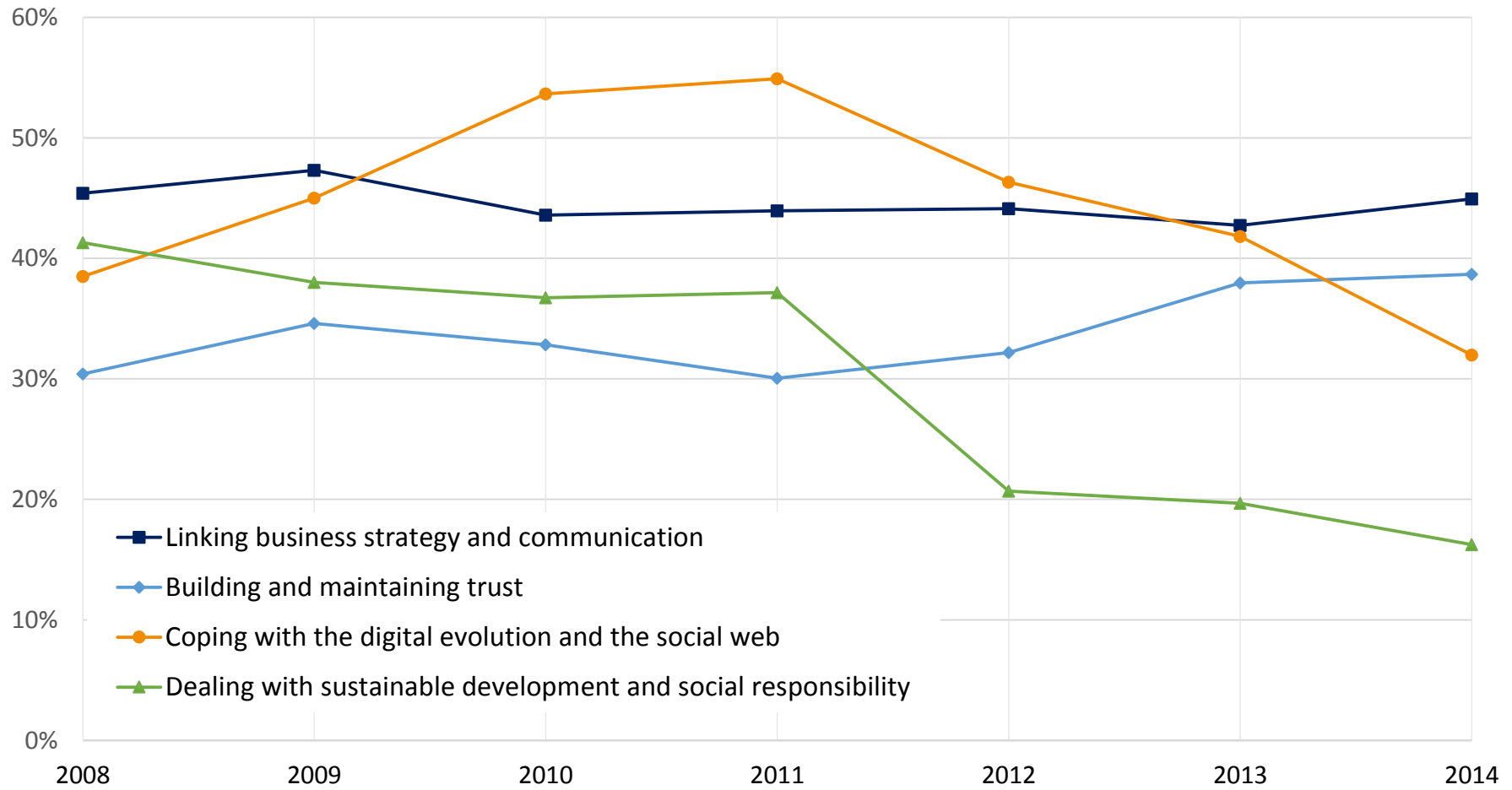
Importance of strategic issues in different types of organisation



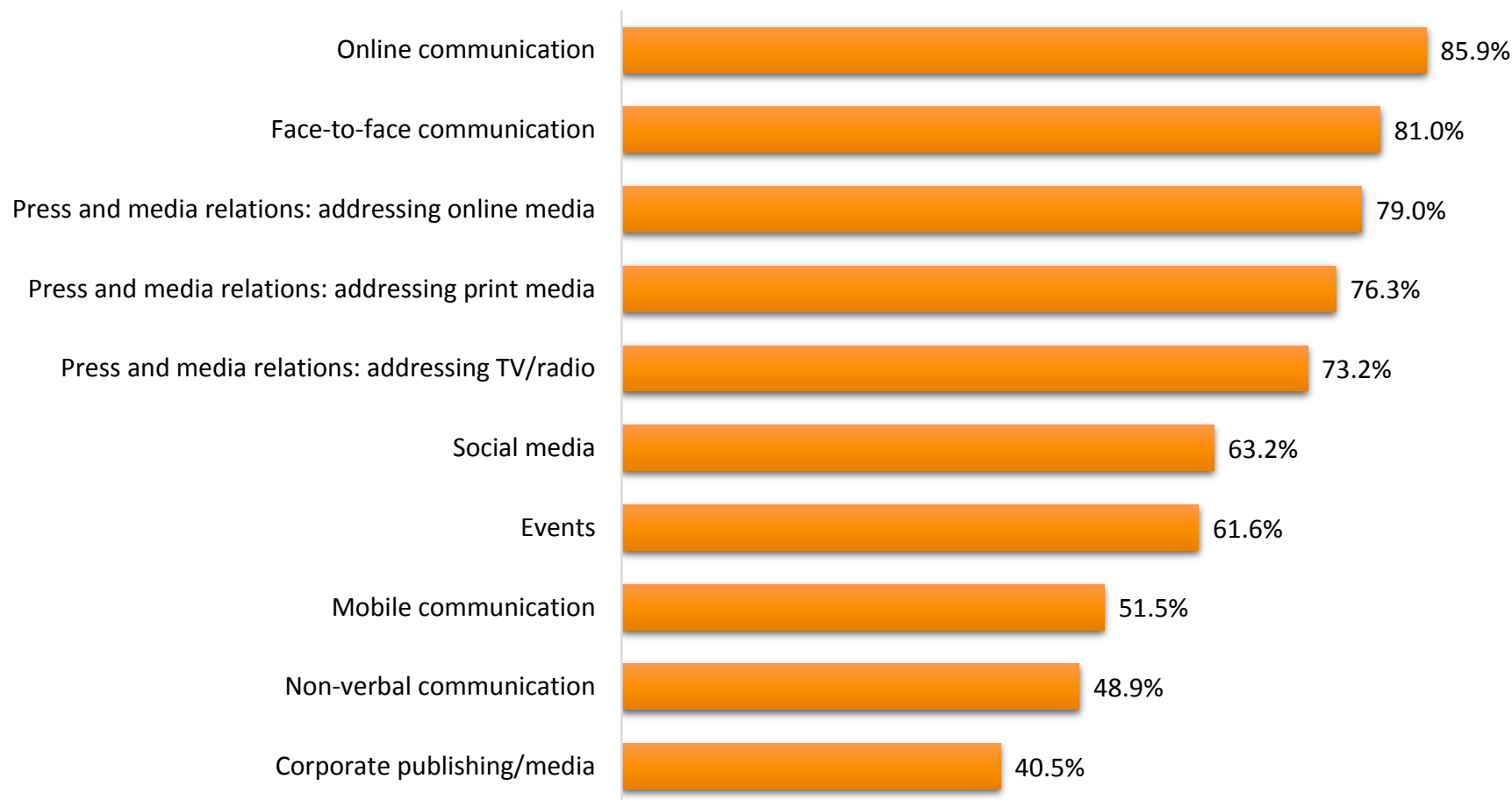
Country-to-country relevance of key issues



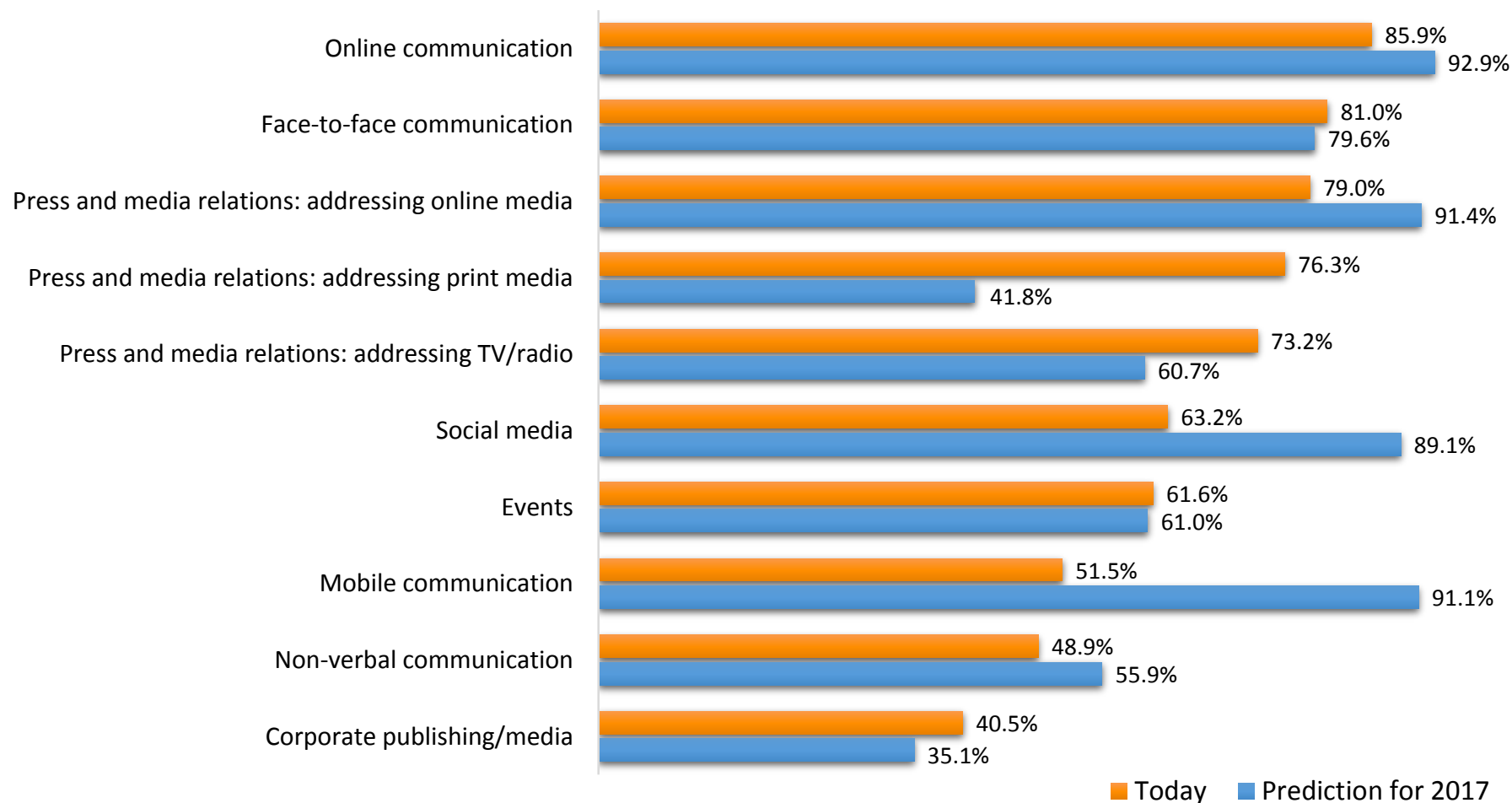
Top four issues for communication management in Europe since 2008



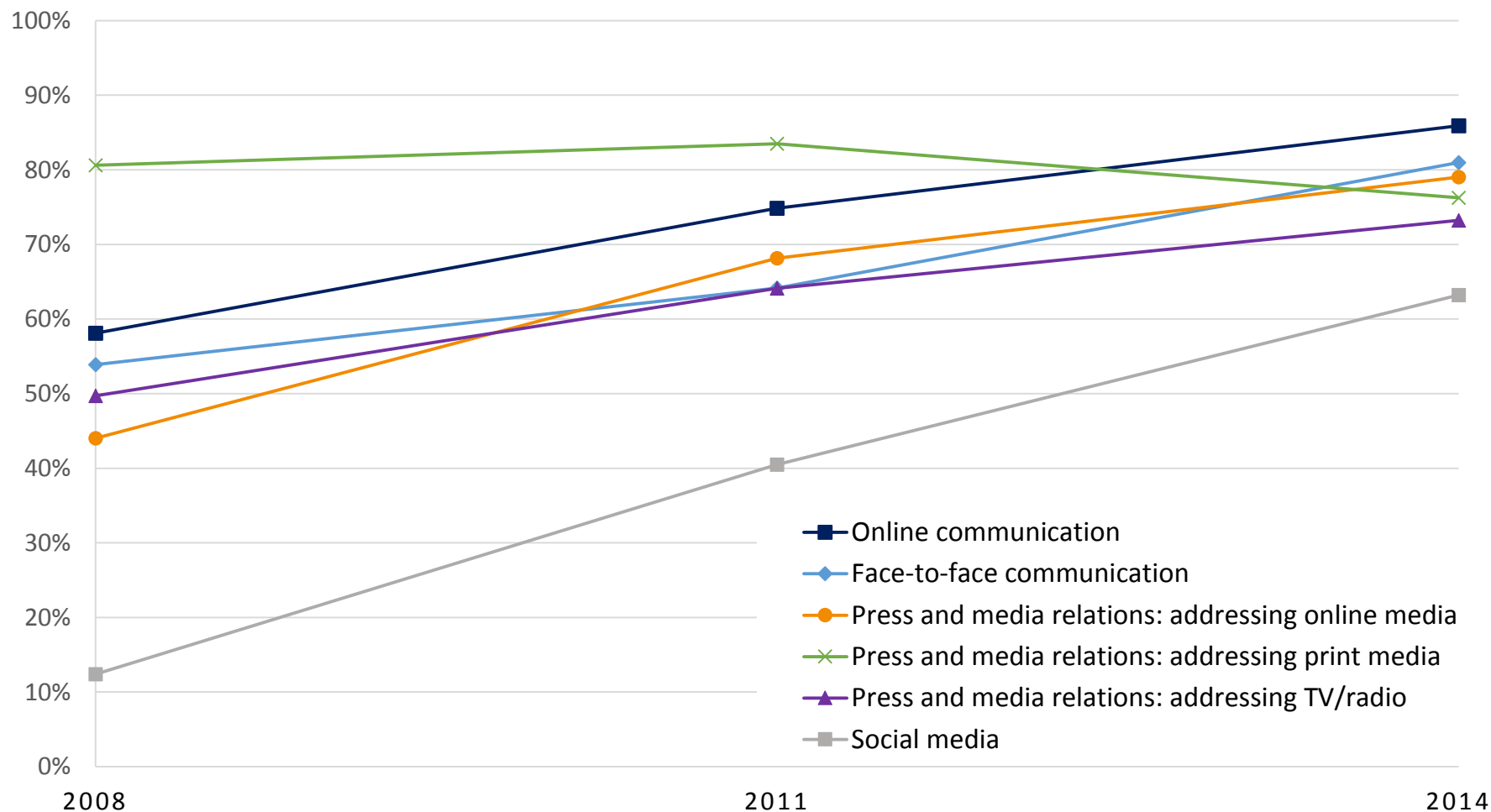
Importance of various channels and instruments in strategic communication



Expected development of communication channels within the next three years



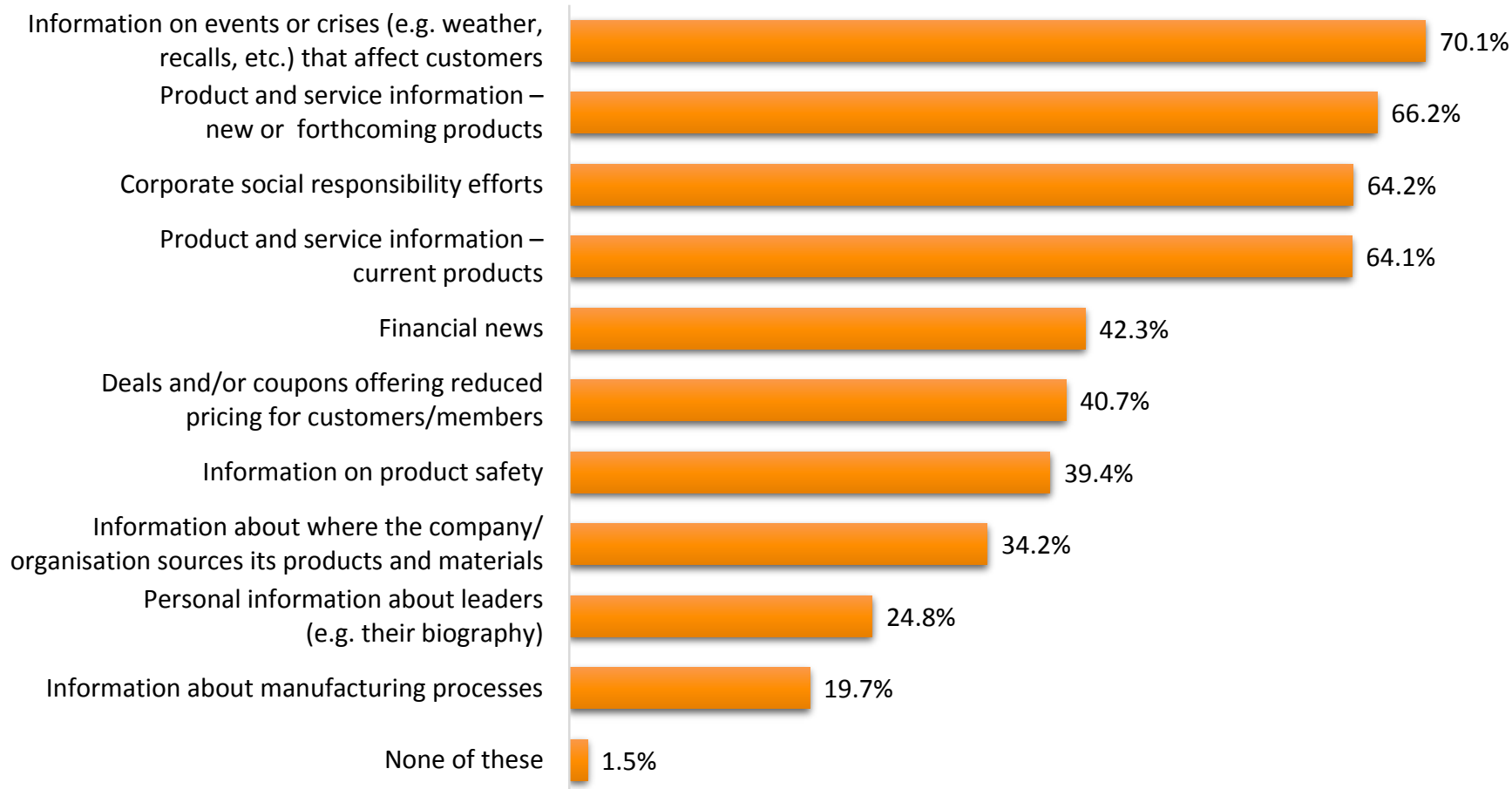
Digital media and face-to-face communication gain in importance, while addressing print media loses ground



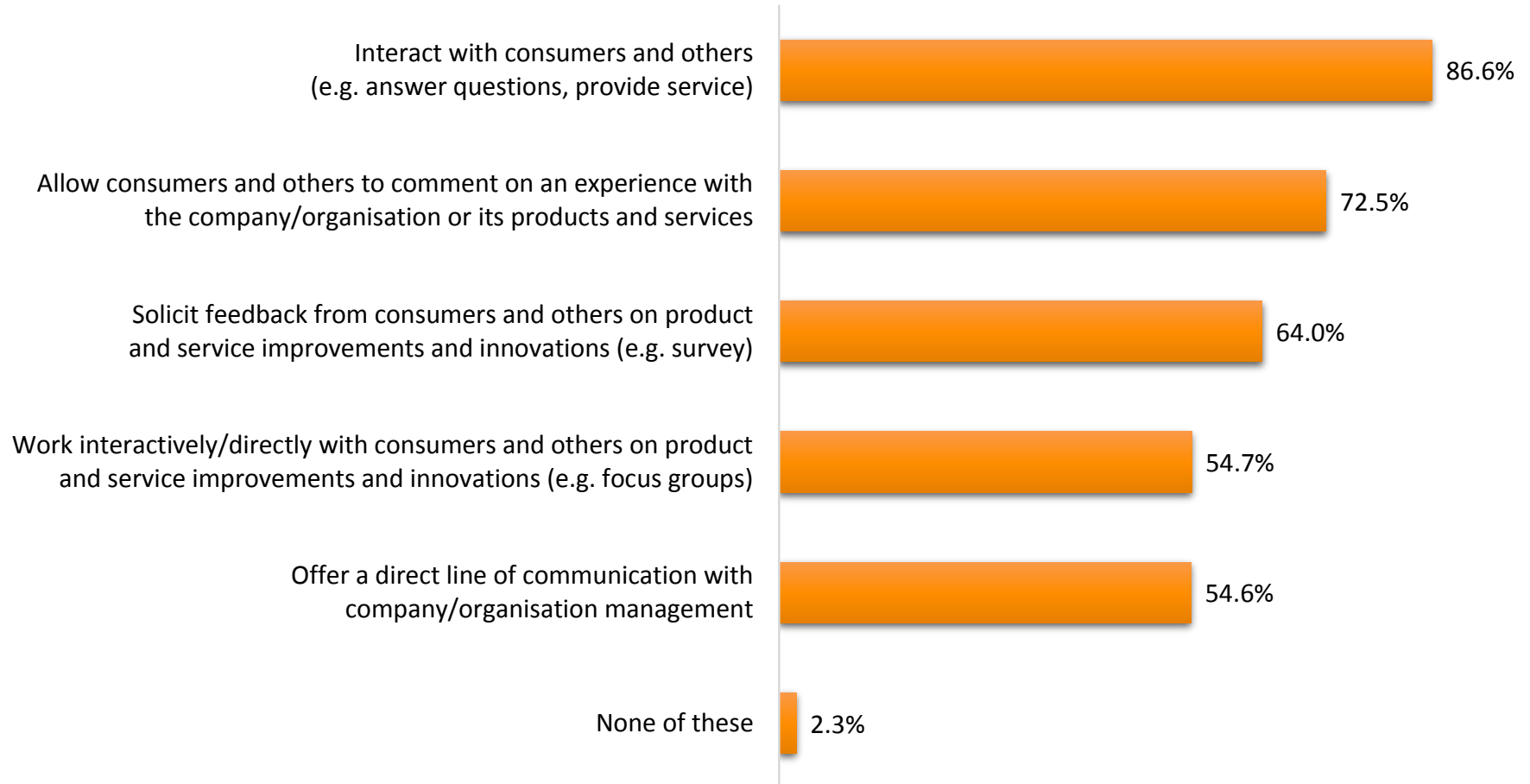
Longitudinal analysis shows that professionals tend to overestimate digital media and underestimate traditional channels

	Predicted importance 2011 - 2014	Real importance 2011 - 2014	Variation
Online communication	+20.5%	+11.1%	-9.4%
Face-to-face communication	+13.0%	+16.9%	+3.9%
Press and media relations: addressing online media	+25.8%	+10.8%	-15.0%
Press and media relations: addressing print media	-16.1%	-7.2%	+8.9%
Press and media relations: addressing TV/radio	+1.8%	+9.1%	+7.3%
Social media	+45.0%	+22.7%	-22.3%
Events	+3.3%	+7.7%	+4.4%
Non-verbal communication	-15.6%	+17.8%	+33.4%
Corporate publishing/media	+6.2%	-1.3%	-7.5%

Social media communication expected by stakeholders, based on the experiences of communication professionals



Types of company behaviour on social media expected by stakeholders, as reported by communicators



Mobile communication



Chapter overview

Mobile communication platforms such as smartphone apps or mobile websites have been identified as a fast growing area in this study. However, the last edition of this survey has shown that there is a large gap between the perceived importance and the real implementation of mobile media (Zerfass et al., 2013). Such findings were in line with other research reports. Fink et al. (2011) were among the first to identify the limited use of mobile applications in strategic communication in Germany. Not much had changed some years later. Even empirical data from regions which are regarded as more tech-savvy than Europe show that most organisations are not utilising the potential of smartphones to engage with young publics (Avidar et al., 2013) and the majority of Fortune 500 companies still don't have mobile websites (McCorkindale & Morgoch, 2013).

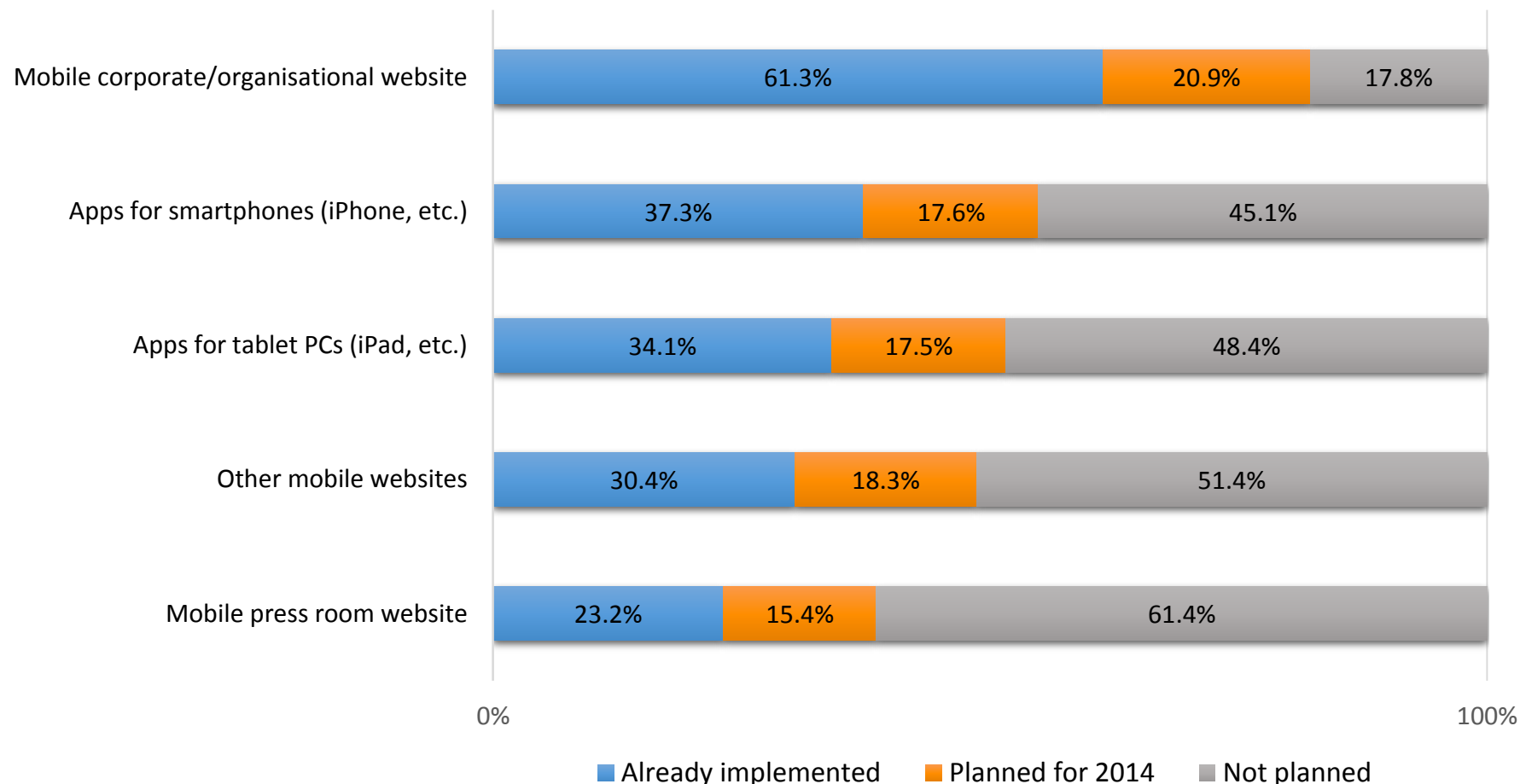
The ECM 2014 has explored the status quo of mobile communication and relevant perceptions in more detail. Approximately one third of the organisations in the sample have implemented apps for smartphones (37.3 per cent) and tablet computers like iPads (34.1 per cent) by now. According to the respondents, these figures may rise above 50 per cent by the end of the year. However, the most implemented (61.3 per cent) and also the most planned use of mobile applications (another 20.9 per cent until the end of 2014) can be located in the area of mobile corporate/organisational websites. Joint stock companies are most active here, and they are even more clearly ahead in integrating apps into the communication portfolio.

Interestingly, mobile applications are almost the only area of professional communication where traditional divisions between different parts of Europe are meaningless: mobile corporate/organisational websites are the most common in Serbia (74.4 per cent), followed by Croatia (68.7 per cent), Austria (68.3 per cent), Italy (67.9 per cent), Portugal (67.6 per cent), Spain (67.4 per cent) and the United Kingdom (67.1 per cent).

A majority of the communicators in Europe see the main opportunities of mobile communication in enabling communication with stakeholders at any time (59.5 per cent), user-friendly content presentation (53.7 per cent) and reaching younger publics (40.4 per cent). The main challenges are related to integrating mobile media with other channels and platforms (57.9 per cent), finding conclusive concepts which create added value (47.3 per cent) and presenting complex content on small screens (45.9 per cent).

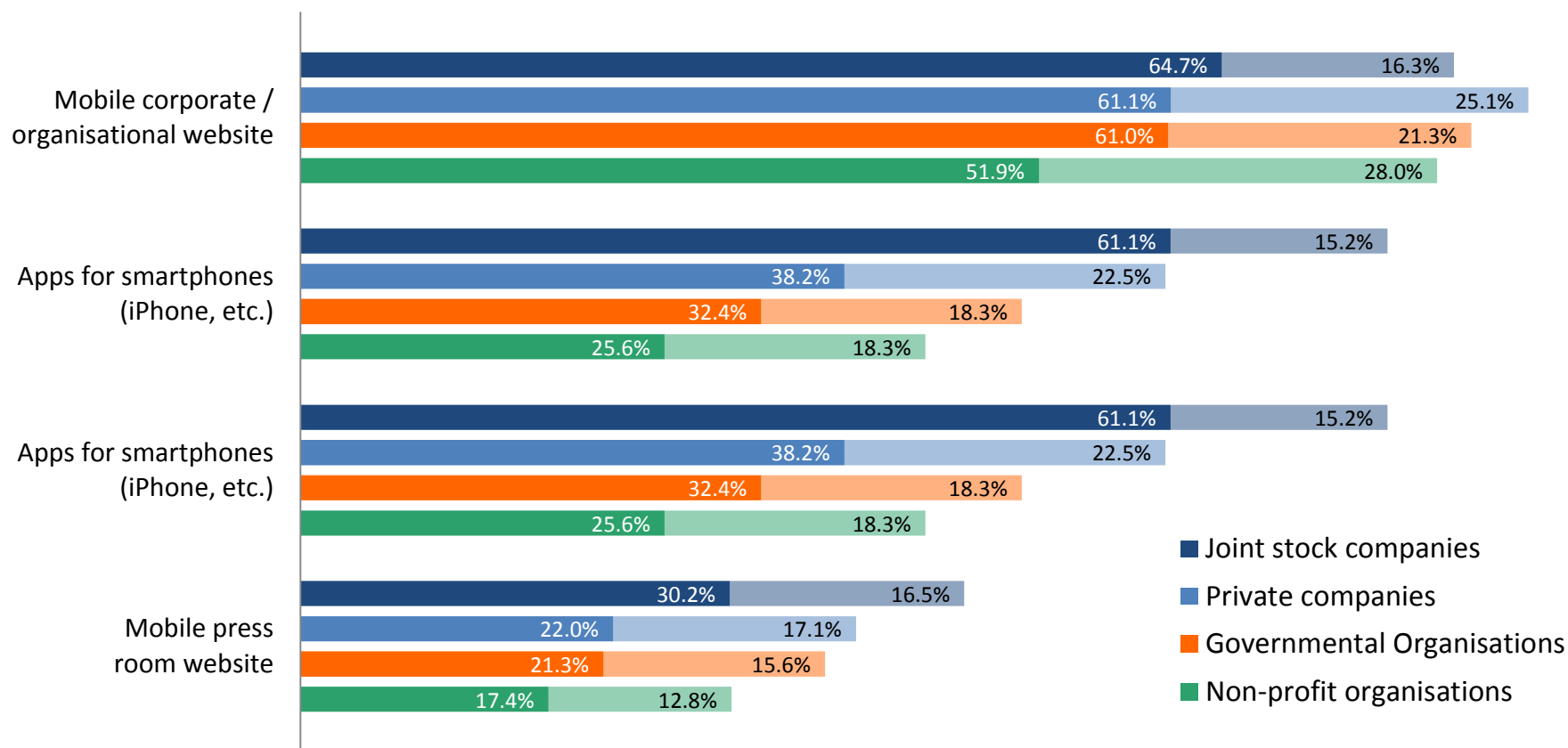
In the analysis, the perceived opportunities of mobile communication have been classified as strategic opportunities (communication with stakeholders at any time, location based information and services, market research and utilisation of customer information), operational opportunities (user-friendly content presentation, reaching younger publics) and pragmatic opportunities (presenting organisations as innovative and modern, additional dissemination of information, re-use of online and social media content). Communicators in companies recognise the more strategic value of mobile applications, while others value operational benefits much higher. Also challenges were divided between strategic, operational and pragmatic challenges. In this case, there are almost no differences between various types of organisations. All of them face mainly operational challenges like aligning mobile media to other platforms and developing mobile skills among communication professionals.

Current and future use of mobile applications in strategic communication

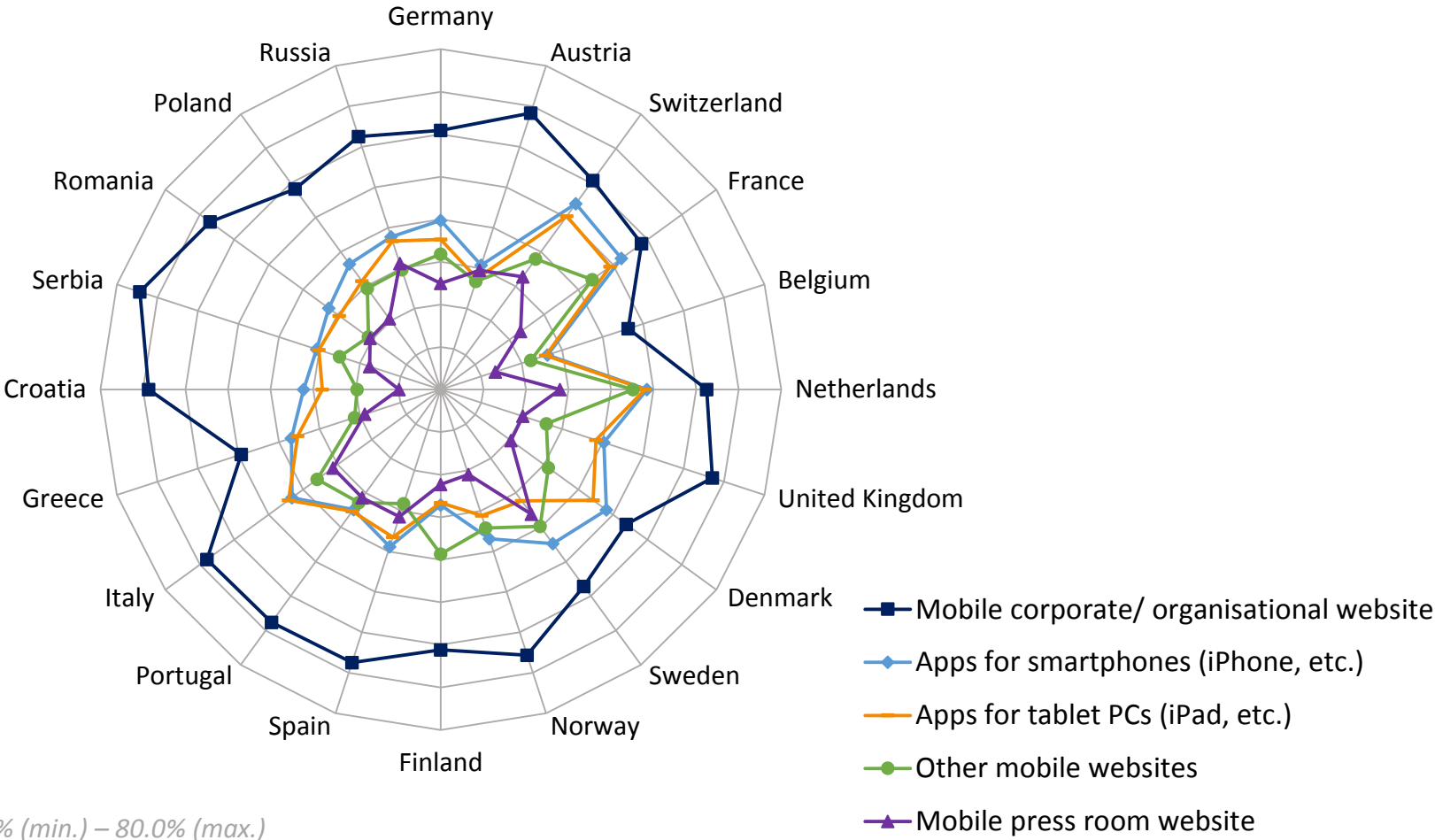


Mobile communication in different types of organisations

Applications already implemented and planned for 2014



Country-to-country analysis of mobile communication



Scale: 0.0% (min.) – 80.0% (max.)

www.communicationmonitor.eu / Zerfass et al. 2014 / n^{min} = 2,262 PR professionals from 20 countries. Q 18: Which of the following applications for smartphones and tablet computers are currently used by your organisation and which will be introduced until the end of the year? Highly significant differences for all items (chi-square test, p ≤ 0.01).

Mobile applications in organisations across Europe

	Mobile corporate/ organisational website		Apps for smartphones (iPhone, etc.)		Apps for tablet PCs (iPad, etc.)		Other mobile websites		Mobile press room website	
	Implemented	Planned	Implemented	Planned	Implemented	Planned	Implemented	Planned	Implemented	Planned
Germany	60.9%	21.8%	39.8%	14.6%	35.3%	16.5%	31.8%	15.9%	25.0%	19.2%
Austria	68.3%	17.5%	30.8%	13.7%	27.4%	14.2%	26.7%	11.9%	29.5%	19.6%
Switzerland	60.8%	23.8%	54.0%	12.7%	50.4%	14.4%	37.9%	14.7%	32.8%	13.9%
France	58.3%	18.3%	52.5%	23.0%	49.2%	18.0%	44.0%	12.0%	23.2%	19.6%
Belgium	46.3%	26.5%	26.4%	18.4%	25.9%	16.7%	22.2%	11.8%	13.5%	7.7%
Netherlands	62.5%	28.1%	48.4%	18.5%	48.0%	18.7%	45.2%	16.4%	28.0%	15.4%
United Kingdom	67.1%	18.9%	40.3%	20.9%	38.3%	21.1%	26.1%	29.6%	20.3%	17.3%
Denmark	53.8%	32.7%	48.1%	15.4%	44.2%	15.4%	31.3%	25.0%	20.4%	18.4%
Sweden	57.1%	27.5%	44.8%	11.0%	32.3%	13.8%	39.8%	18.0%	36.2%	17.8%
Norway	65.6%	23.4%	36.9%	6.6%	31.1%	8.2%	34.2%	19.8%	21.0%	16.0%

Mobile applications in organisations across Europe

	Mobile corporate/ organisational website		Apps for smartphones (iPhone, etc.)		Apps for tablet PCs (iPad, etc.)		Other mobile websites		Mobile press room website	
	Implemented	Planned	Implemented	Planned	Implemented	Planned	Implemented	Planned	Implemented	Planned
Finland	61.2%	25.0%	27.1%	16.4%	26.6%	13.7%	38.6%	18.2%	22.3%	8.6%
Spain	67.4%	11.6%	38.8%	17.4%	36.4%	16.9%	28.2%	17.1%	31.5%	13.7%
Portugal	67.6%	14.1%	34.8%	21.2%	35.4%	24.6%	32.8%	21.9%	31.4%	14.3%
Italy	67.9%	17.9%	43.3%	20.2%	44.2%	19.2%	35.9%	22.8%	31.3%	20.2%
Greece	49.3%	17.4%	36.9%	23.1%	35.4%	18.5%	21.3%	19.7%	18.8%	15.6%
Croatia	68.7%	10.4%	32.3%	19.4%	27.9%	19.7%	19.7%	18.0%	9.8%	19.7%
Serbia	74.4%	12.2%	30.7%	22.7%	30.1%	16.4%	25.0%	17.2%	17.6%	18.9%
Romania	67.0%	16.5%	32.5%	15.0%	29.5%	16.7%	21.1%	19.7%	20.5%	14.1%
Poland	58.2%	25.3%	36.5%	20.3%	31.5%	21.9%	29.4%	29.4%	20.6%	26.5%
Russia	62.5%	12.5%	37.7%	21.3%	36.7%	20.0%	29.6%	14.8%	31.1%	11.5%

Key opportunities and challenges of mobile communication

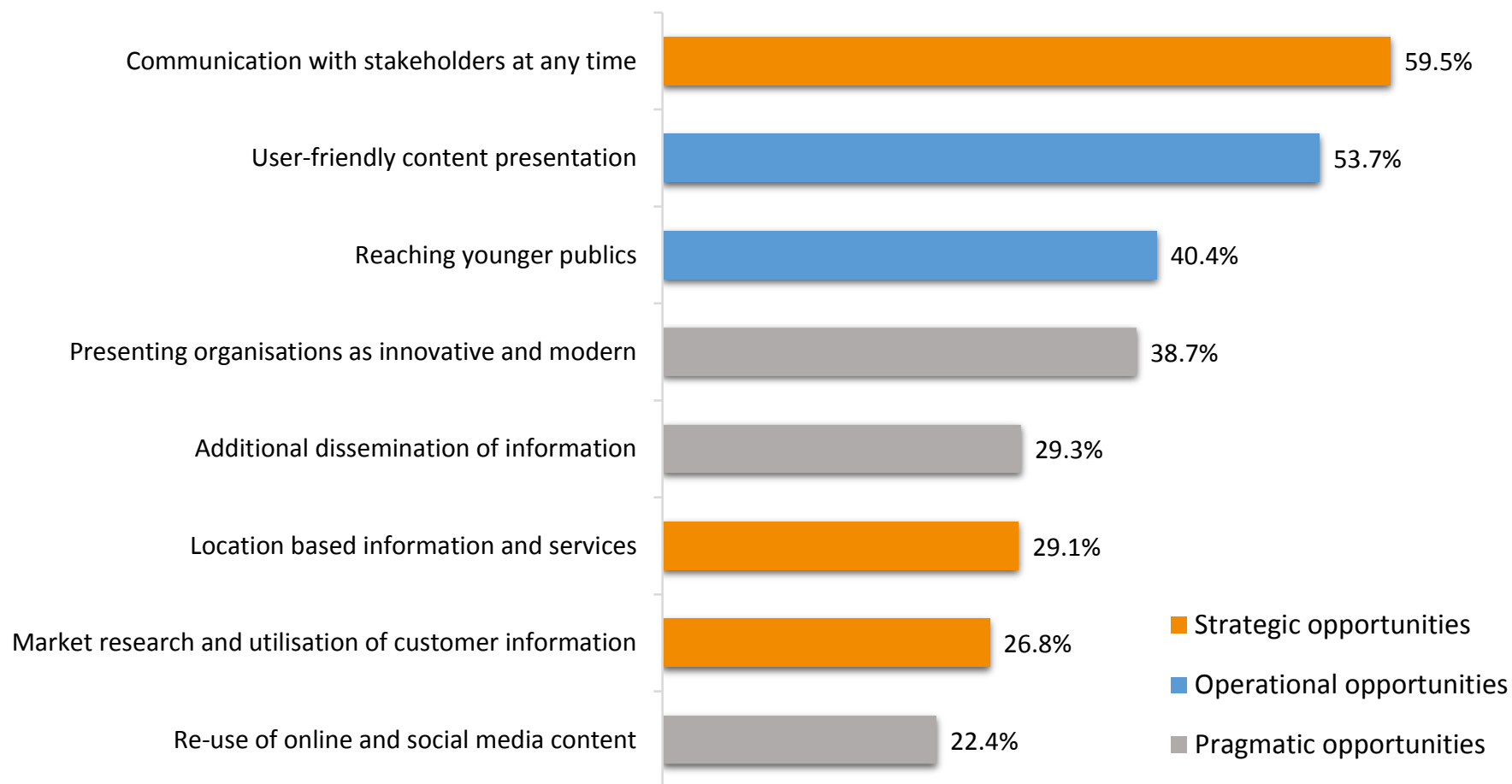
Opportunities

- Communication with stakeholders at any time
- User-friendly content presentation
- Reaching younger publics

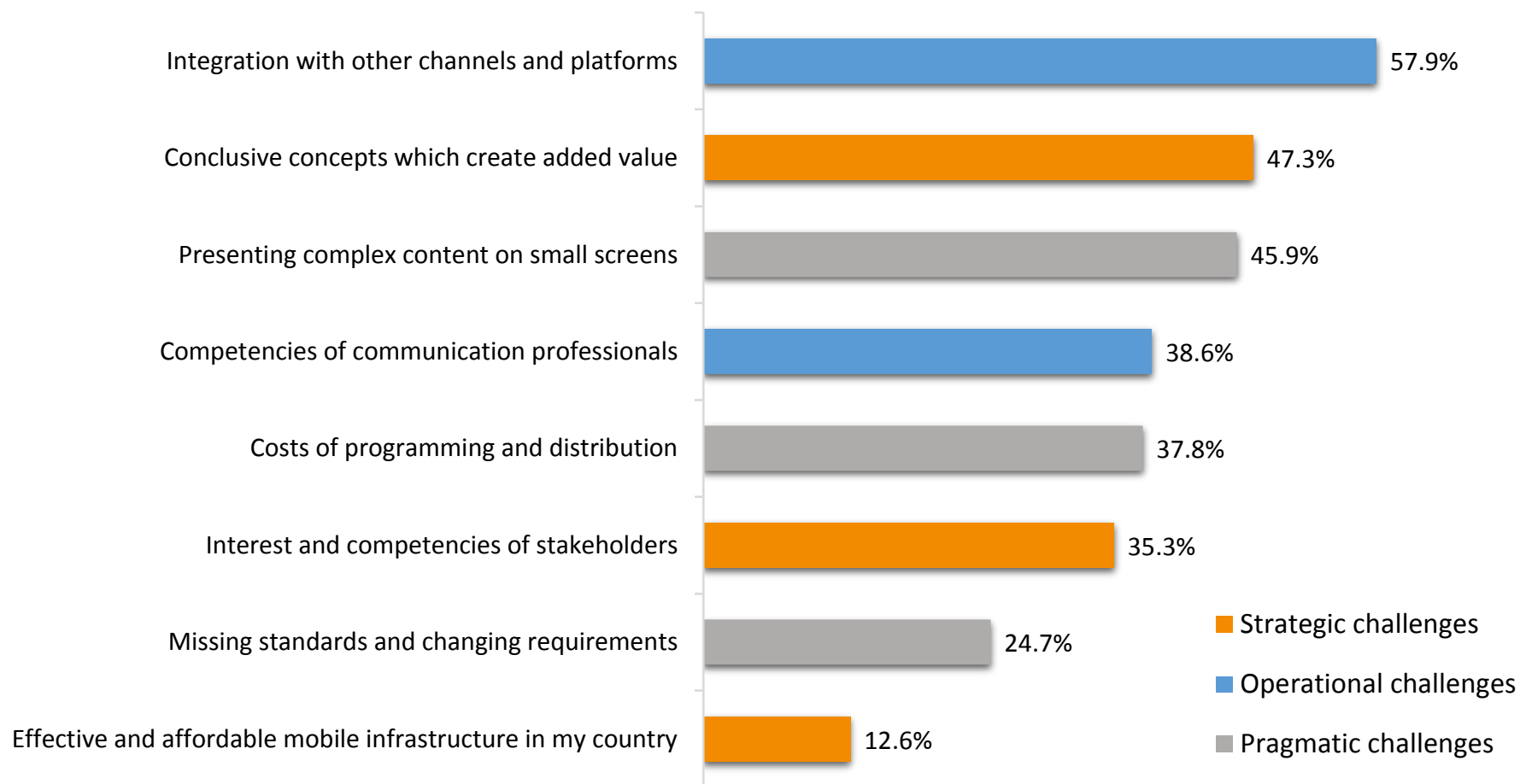
Challenges

- Integration with other channels and platforms
- Conclusive concepts which create added value
- Presenting complex content on small screens

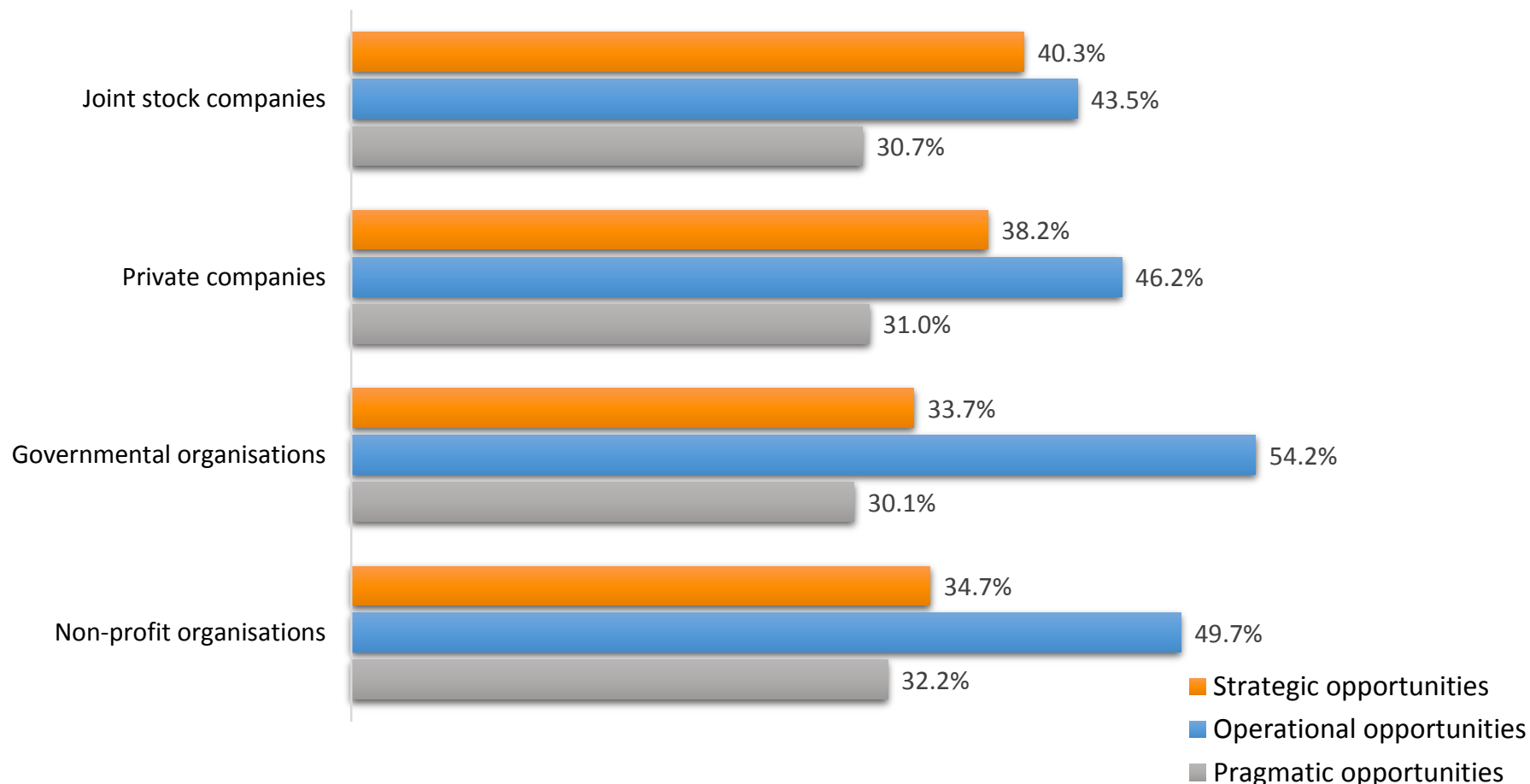
Perceived opportunities of mobile communication



Perceived challenges of mobile communication

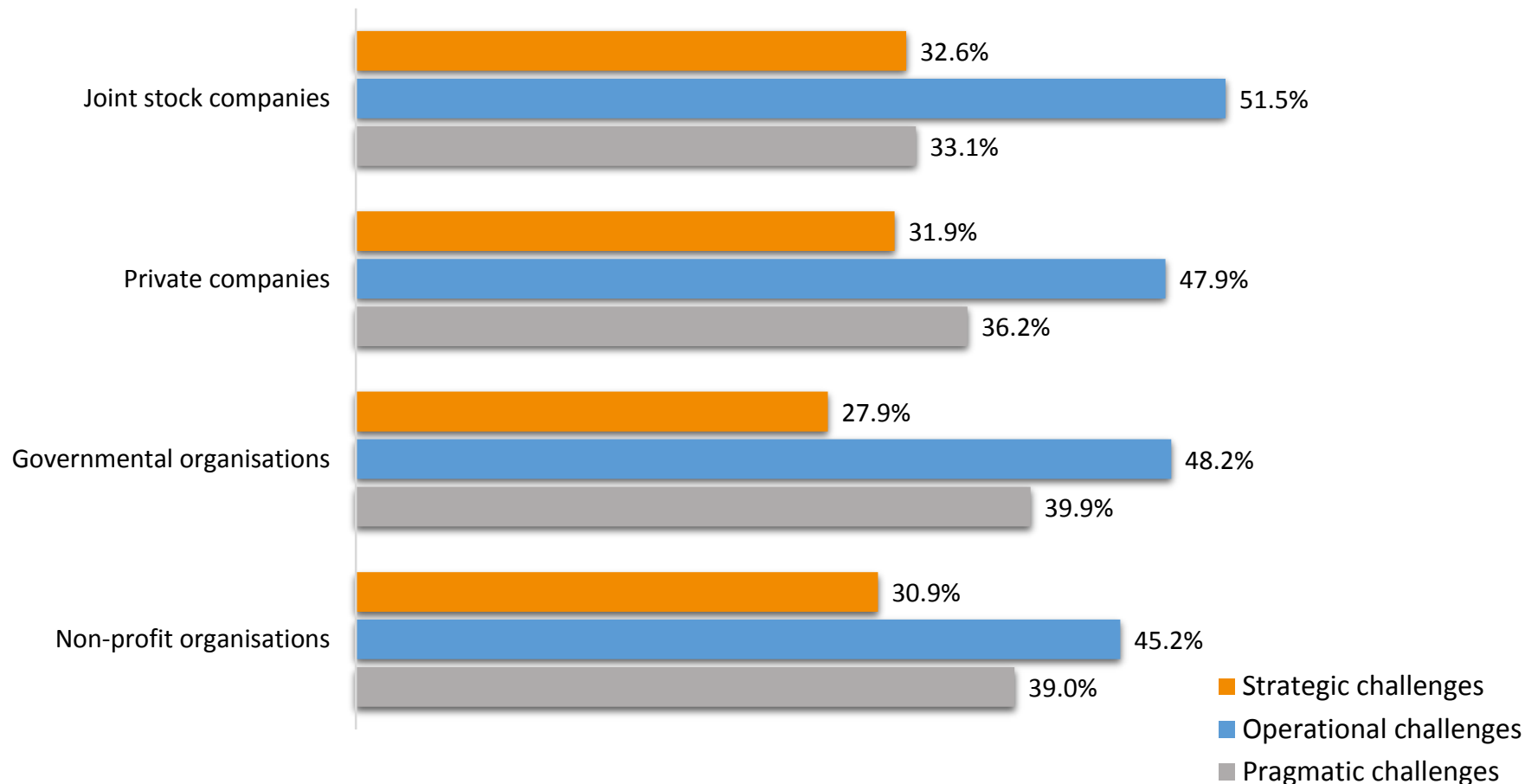


Communicators working in companies tend to see the strategic value of mobile applications, while others seek mainly operational benefits



www.communicationmonitor.eu / Zerfass et al. 2014 / n = 2,090 PR professionals in communication departments. Q 19: In your opinion, what are the greatest opportunities of using mobile applications in strategic communication? Exactly 3 picks per respondent. Percentages: bases on a weighted calculation of all items. One operational item counts 1/2 (50%), two operational items count 3/3 (100%). All other items count 1/3 (33.3%), two selected items count 2/3 (66.6%), three selected items count 3/3 (100%).

All organisations face mainly operational challenges when dealing with mobile media



www.communicationmonitor.eu / Zerfass et al. 2014 / n = 2,090 PR professionals in communication departments. Q 19: In your opinion, what are the greatest opportunities of using mobile applications in strategic communication? Exactly 3 picks per respondent. Percentages: bases on a weighted calculation of all items. One operational item counts 1/2 (50%), two operational items count 3/3 (100%). All other items count 1/3 (33.3%), two selected items count 2/3 (66.6%), three selected items count 3/3 (100%).

Top three opportunities and challenges of mobile communication across Europe

	Key opportunities of mobile communication			Key challenges of mobile communication		
	Communication with stakeholders at any time	User-friendly content presentation	Reaching younger publics	Integration with other channels and platforms	Conclusive concepts which create added value	Presenting complex content on small screens
Germany	59.3%	62.3%	48.0%	46.6%	65.2%	49.5%
Austria	52.4%	66.7%	44.4%	51.6%	63.5%	46.8%
Switzerland	58.6%	61.4%	41.4%	51.4%	58.6%	45.7%
France	43.9%	45.5%	36.4%	68.2%	57.6%	48.5%
Belgium	67.8%	49.2%	32.8%	57.1%	45.8%	48.6%
Netherlands	69.2%	65.1%	33.7%	65.1%	59.2%	39.1%
United Kingdom	74.2%	52.3%	32.9%	59.4%	31.6%	51.6%
Denmark	76.8%	64.3%	25.0%	71.4%	26.8%	57.1%
Sweden	53.4%	72.0%	40.9%	62.7%	46.6%	53.9%
Norway	66.9%	78.5%	33.8%	60.0%	49.2%	56.2%

Top three opportunities and challenges of mobile communication across Europe

	Key opportunities of mobile communication			Key challenges of mobile communication		
	Communication with stakeholders at any time	User-friendly content presentation	Reaching younger publics	Integration with other channels and platforms	Conclusive concepts which create added value	Presenting complex content on small screens
Finland	56.0%	66.7%	34.0%	56.0%	51.6%	45.3%
Spain	69.1%	29.4%	41.9%	66.9%	46.3%	42.6%
Portugal	62.0%	35.4%	32.9%	69.6%	45.6%	45.6%
Italy	63.1%	37.8%	40.5%	69.4%	35.1%	40.5%
Greece	60.3%	26.0%	47.9%	64.4%	46.6%	46.6%
Croatia	67.1%	42.9%	42.9%	48.6%	41.4%	45.7%
Serbia	51.1%	44.6%	42.4%	52.2%	31.5%	37.0%
Romania	52.5%	41.6%	50.5%	54.5%	41.6%	37.6%
Poland	49.4%	52.8%	48.3%	64.0%	38.2%	37.1%
Russia	50.7%	50.7%	36.6%	49.3%	39.4%	39.4%

**Gender and
strategic communication**



Chapter overview

Demographic data across Europe prove the ongoing feminisation of the communication profession. As such it is important to understand whether barriers and prejudices identified in earlier research still exist, or whether the intense debate on gender in communications has had an impact. The ECM 2014 answers these questions from an empirical point of view, which does not impede normative judgements.

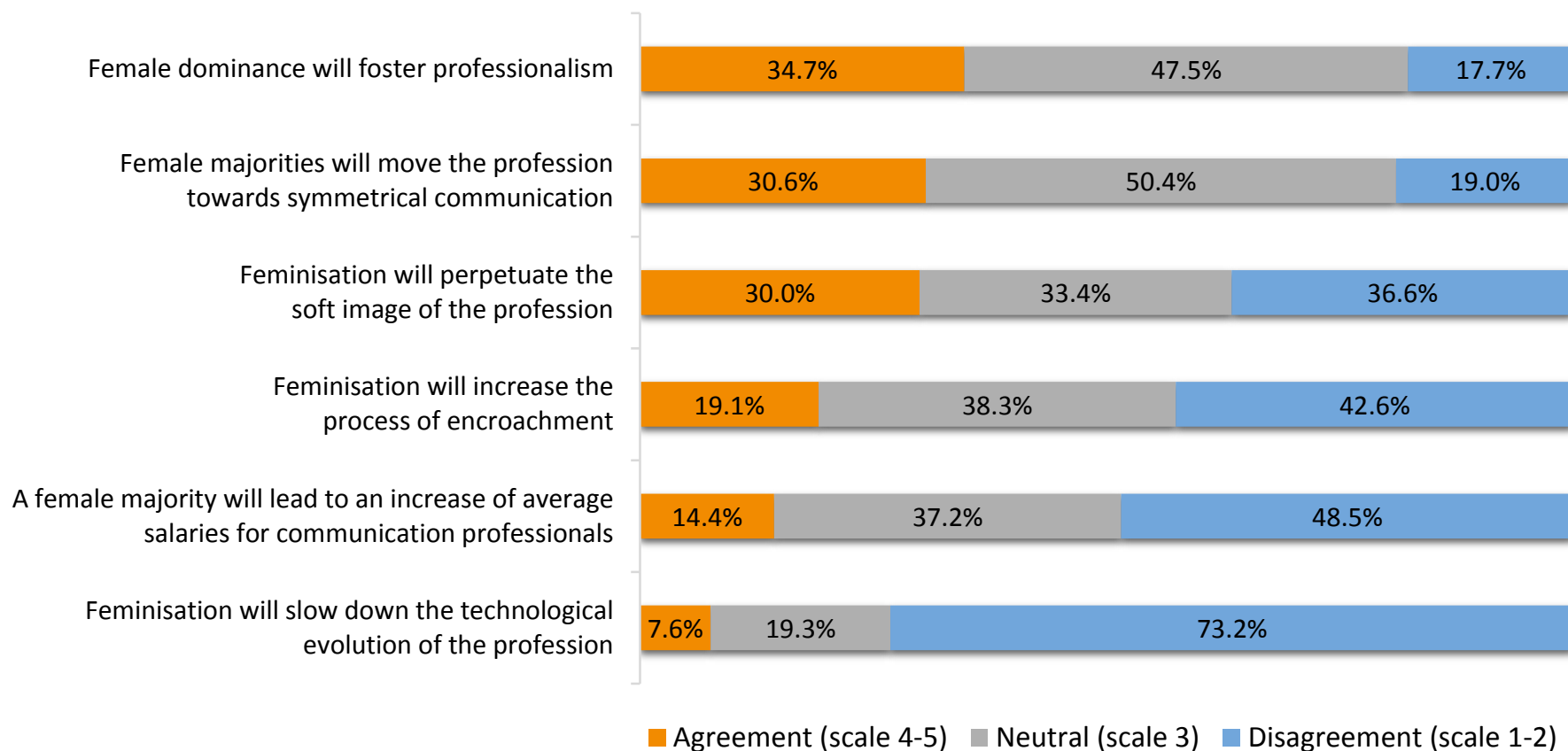
Grunig et al. (2000, 2001) have argued that feminisation will encourage the practice to move towards more professionalism and symmetrical communication. These claims were supported by approximately one third of all respondents in the ECM 2014. Opinions among communication practitioners were quite divided when the impact of a gender shift on the image of the profession was discussed. 36.6 per cent disagreed that the soft image of communications will be perpetuated, 33.4 were neutral and 30.0 per cent supported this view. Encouragingly there was a strong rejection in the responses that feminisation will slow down the technological evolution of the profession (73.2 per cent).

Apart from these generalised perceptions, respondents were asked to report about the concrete situation of female communicators in their organisation. Only one aspect originally identified by Toth and Cline (1991) was more often approved than rejected. 40.7 per cent stated that female professionals need more time for private obligations (i.e. children or other family members) compared to men, which was denied by 38.2 per cent of the communicators. All other statements received more disagreement than agreement. However, female respondents reported significantly more occurrences than men, which might be caused by different levels of awareness or personal experience. Choi and Hon (2002) claim female professionals have to accomplish more to achieve the same success as their male counterparts. Approximately one third of respondents reported that this is true in their organisations, but also that that female practitioners have to work harder to secure quality, long-term relationships with superiors (O'Neil, 2003) and that there are invisible barriers hindering their career path to the top (Wright et al., 1991). The only issue which seems to have lost relevance is less support from mentors (O'Neil, 2003) – a majority of both female and male respondents denied this for their organisation.

Gender traits are a much-contested concept, and leadership theory has long argued that such stereotypes cannot catch the complexity of social interactions (Northouse, 2013). Nevertheless, traits are very relevant in organisational practice. For example Choi and Hon (2002) identify several personal characteristics and skills that can mainly be attributed to male or female communication professionals. The monitor explored them along with additional items on management and operational skills (Algren & Eichhorn, 2007) as well as managerial motivation, willingness to sacrifice other priorities for work, and the ability to command top salaries (Toth & Cline, 1991). The data reveal that many traditional prejudices between the genders are still prevalent in Europe. Men are more often seen as being aggressive, able to promote themselves, self confident, and politically savvy. Women score better in terms of management skills, emotion and sensitivity to people. Again, men and women interpret these issues quite differently. Differing worldviews and experiences have to be taken into account when discussing gender issues.

Effects of the gender shift in communications

Perceived consequences of a female majority upon the profession



Male and female practitioners have different perceptions about the gender shift

Perceived consequences of a female majority upon the profession

Female dominance will foster professionalism **

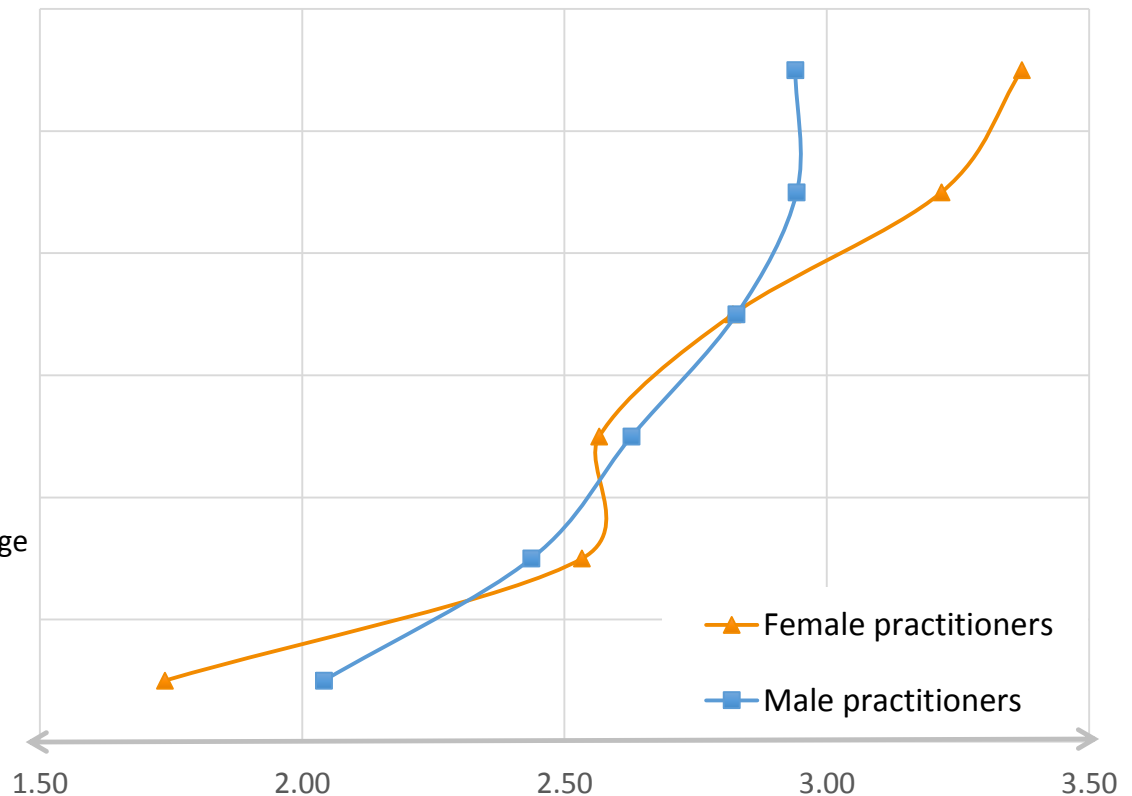
Female majorities will move the profession towards symmetrical communication **

Feminisation will perpetuate the soft image of the profession

Feminisation will increase the process of encroachment

A female majority will lead to an increase of average salaries for communication professionals *

Feminisation will slow down the technological evolution of the profession **



Gender perceptions across Europe

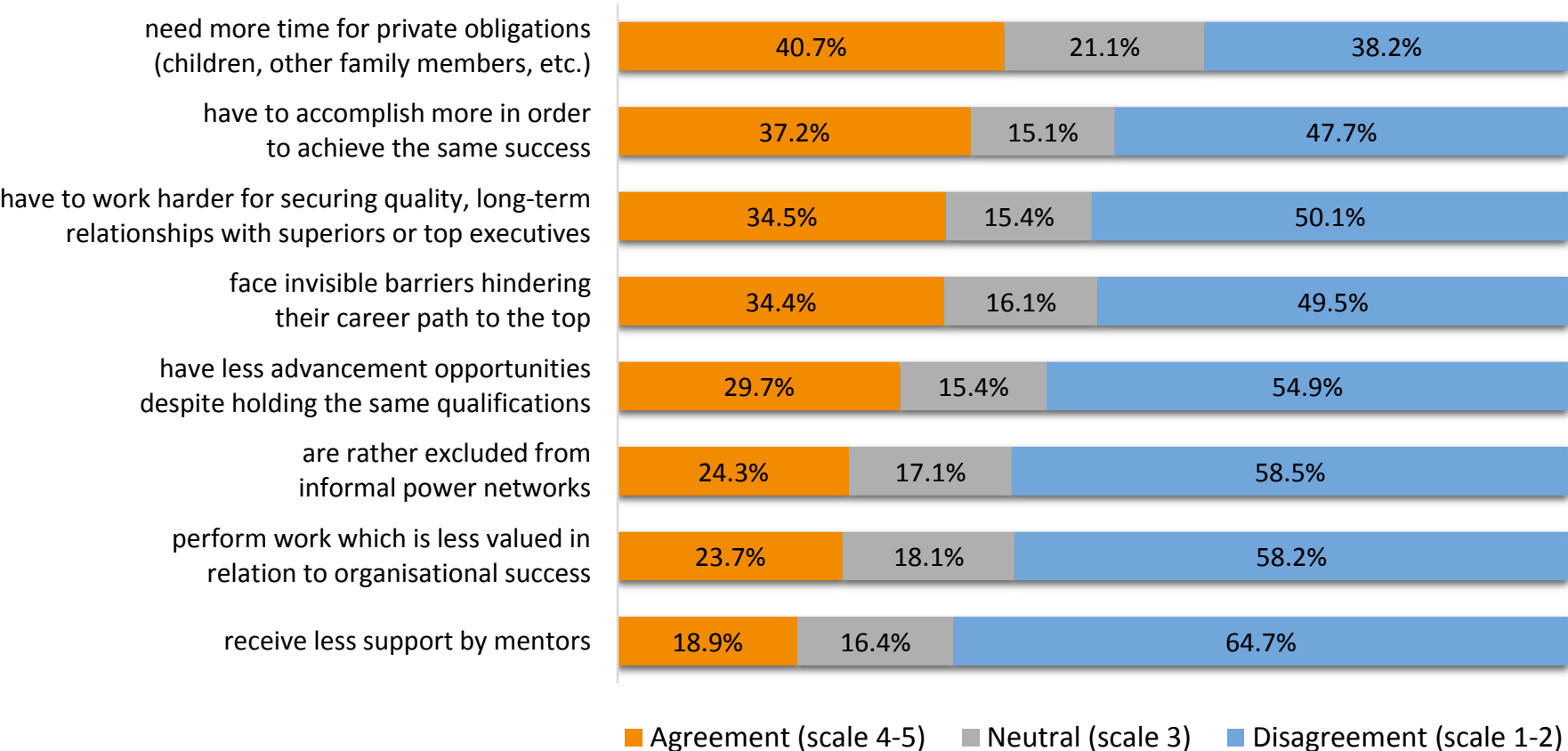
	Female dominance will foster professionalism	Feminisation will perpetuate the soft image of the profession	A female majority will lead to an increase of average salaries for communication professionals	Feminisation will increase the process of encroachment	Female majorities will move the profession towards symmetrical communication	Feminisation will slow down the technological evolution of the profession
Germany	3.23	2.84	2.34	2.37	3.11	1.75
Austria	3.34	2.99	2.45	2.58	3.37	1.83
Switzerland	3.02	2.77	2.24	2.36	2.95	1.79
France	3.08	2.65	2.58	2.48	2.85	1.53
Belgium	3.11	2.71	2.51	2.64	2.94	1.77
Netherlands	3.12	2.96	2.64	2.53	3.14	1.86
United Kingdom	3.06	2.61	2.43	2.43	3.08	1.70
Denmark	2.89	2.88	2.30	2.55	2.80	2.09
Sweden	3.32	2.86	2.26	2.34	3.08	1.62
Norway	3.25	3.00	2.32	2.46	3.20	1.86

Gender perceptions across Europe

	Female dominance will foster professionalism	Feminisation will perpetuate the soft image of the profession	A female majority will lead to an increase of average salaries for communication professionals	Feminisation will increase the process of encroachment	Female majorities will move the profession towards symmetrical communication	Feminisation will slow down the technological evolution of the profession
Finland	3.21	3.40	2.28	2.82	3.15	1.86
Spain	3.13	2.11	2.76	2.51	3.01	1.70
Portugal	3.25	2.56	2.53	2.53	3.03	1.87
Italy	3.46	2.48	2.51	2.56	3.16	1.68
Greece	3.30	2.71	2.58	2.75	3.18	1.89
Croatia	3.61	2.91	2.74	3.07	3.44	1.94
Serbia	3.40	2.88	2.73	2.98	3.28	1.99
Romania	3.27	2.96	2.77	2.80	3.14	2.03
Poland	3.29	3.12	2.78	2.76	3.31	2.25
Russia	3.06	2.89	2.54	2.70	2.94	2.17

Gender issues in practice

In my organisation, female communication professionals, compared to male practitioners ...



Male and female practitioners report different practices in organisations

In my organisation, female communication professionals, compared to male practitioners ...

need more time for private obligations
(children, other family members, etc.)

have to accomplish more in order to
achieve the same success **

have to work harder for securing quality, long-term
relationships with superiors or top executives **

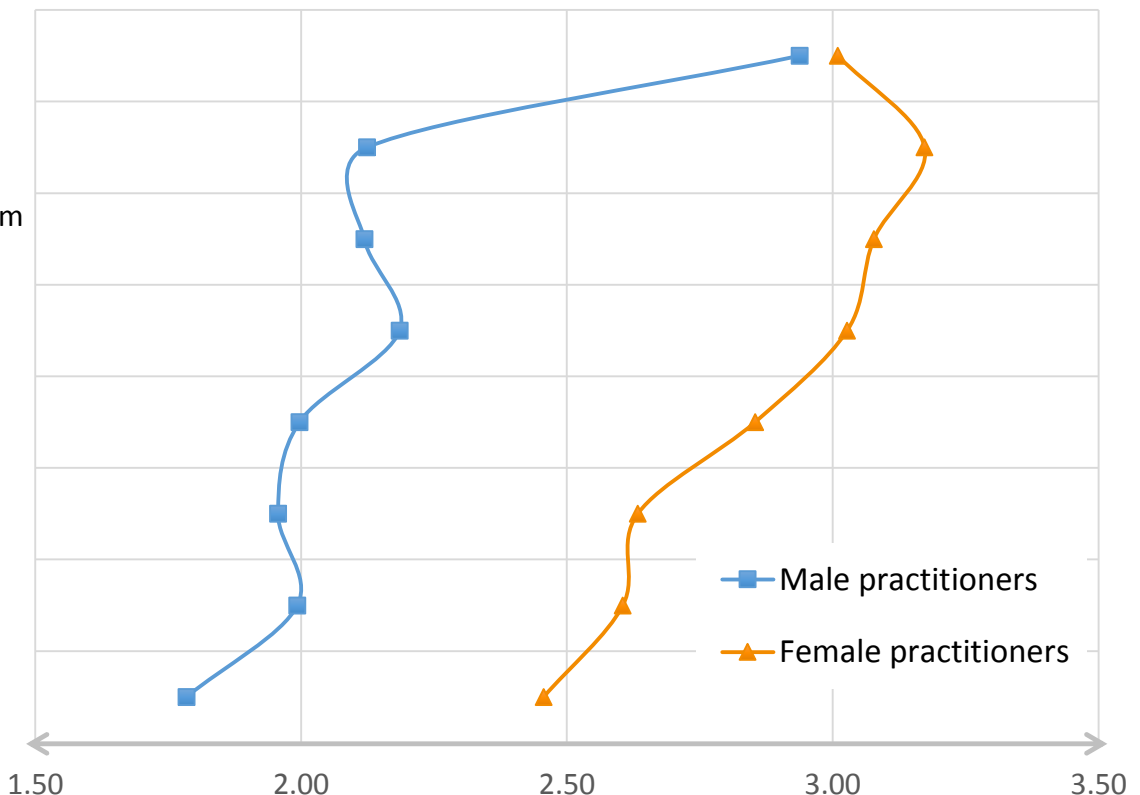
face invisible barriers hindering their
career path to the top **

have less advancement opportunities
despite holding the same qualifications **

perform work which is less valued in
relation to organisational success **

are rather excluded from
informal power networks **

receive less support by mentors **



Gender issues in practice in different types of organisations

In my organisation, female communication professionals, compared to male practitioners ...

need more time for private obligations (children, other family members, etc.) *

have to accomplish more in order to achieve the same success **

have to work harder for securing quality, long-term relationships with superiors or top executives **

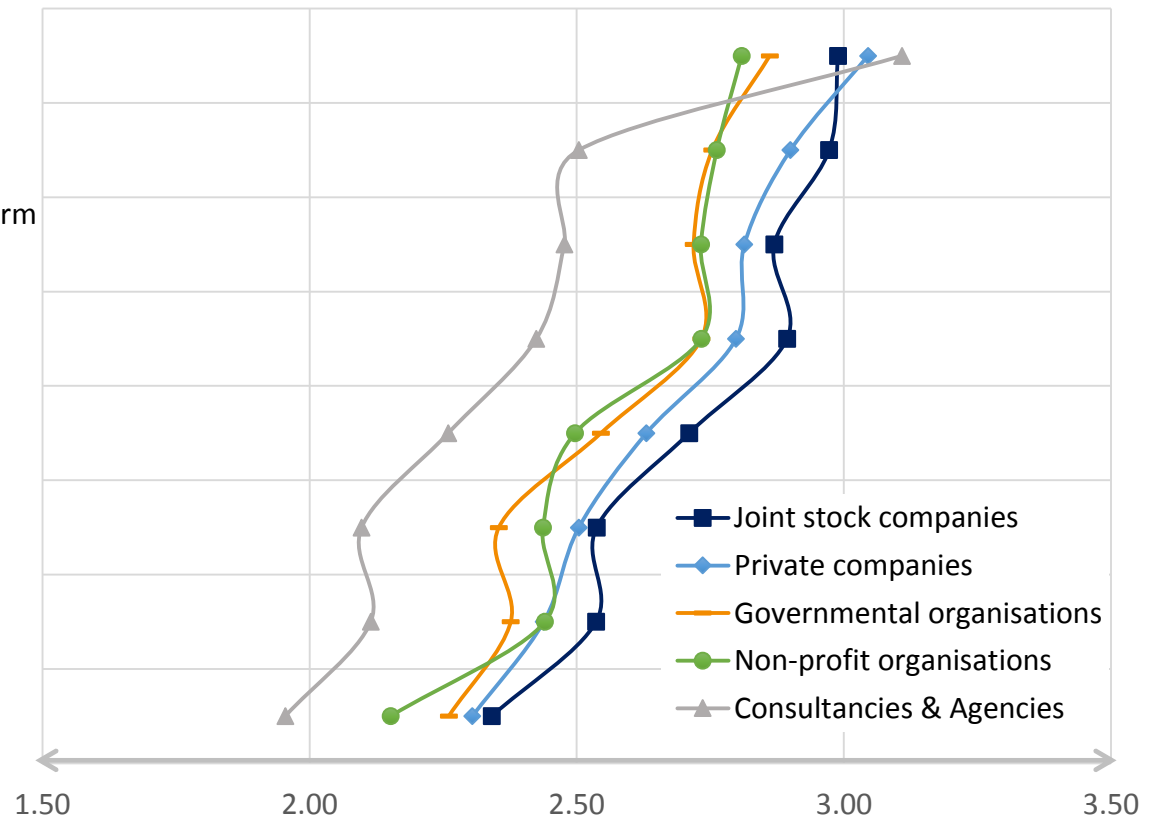
face invisible barriers hindering their career path to the top **

have less advancement opportunities despite holding the same qualifications **

perform work which is less valued in relation to organisational success **

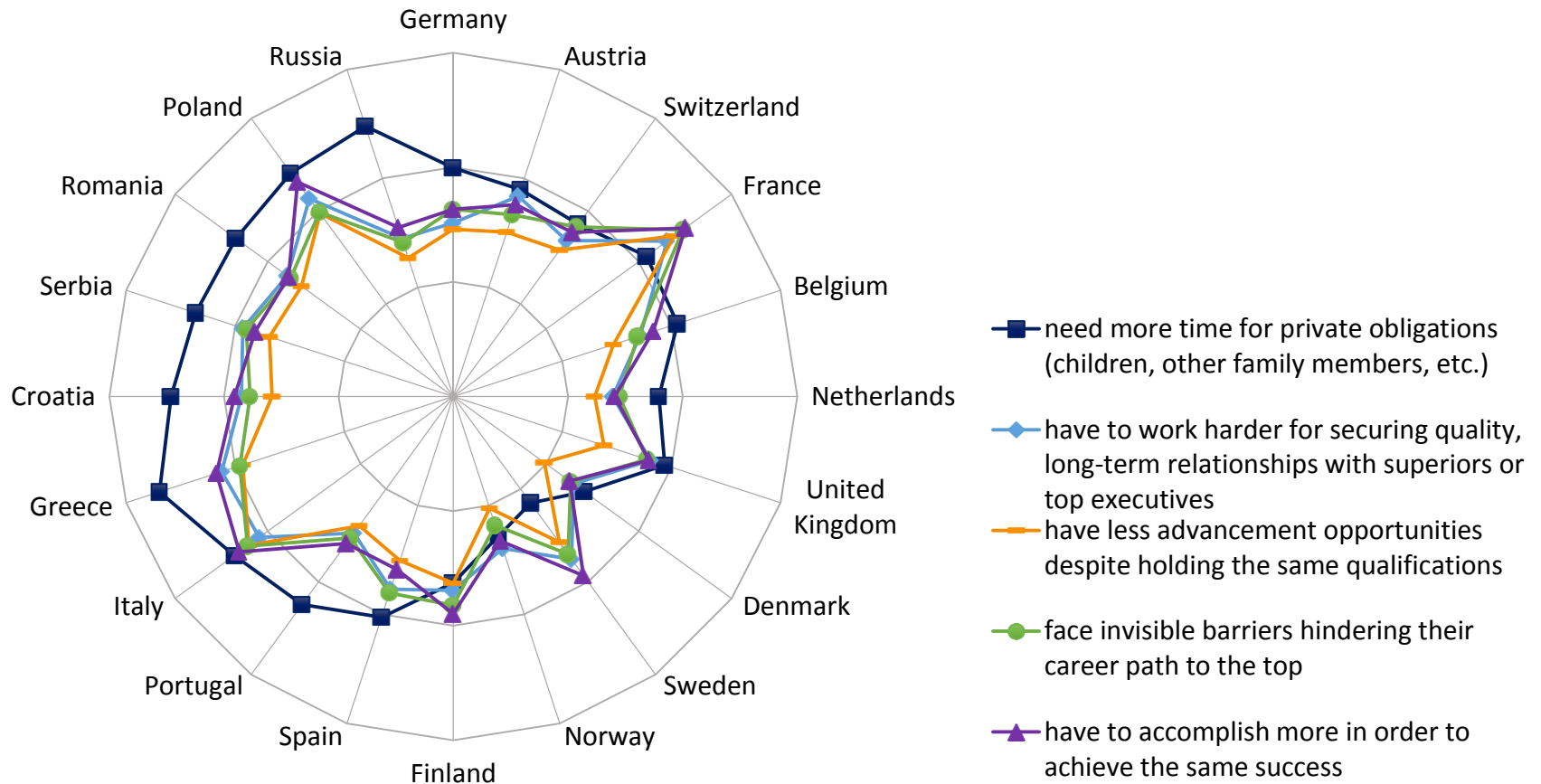
are rather excluded from informal power networks **

receive less support by mentors **



Gender issues in practice across Europe

In my organisation, female communication professionals, compared to male practitioners ...



Scale: 1 (min.) – 4 (max.)

Gender issues in practice across Europe

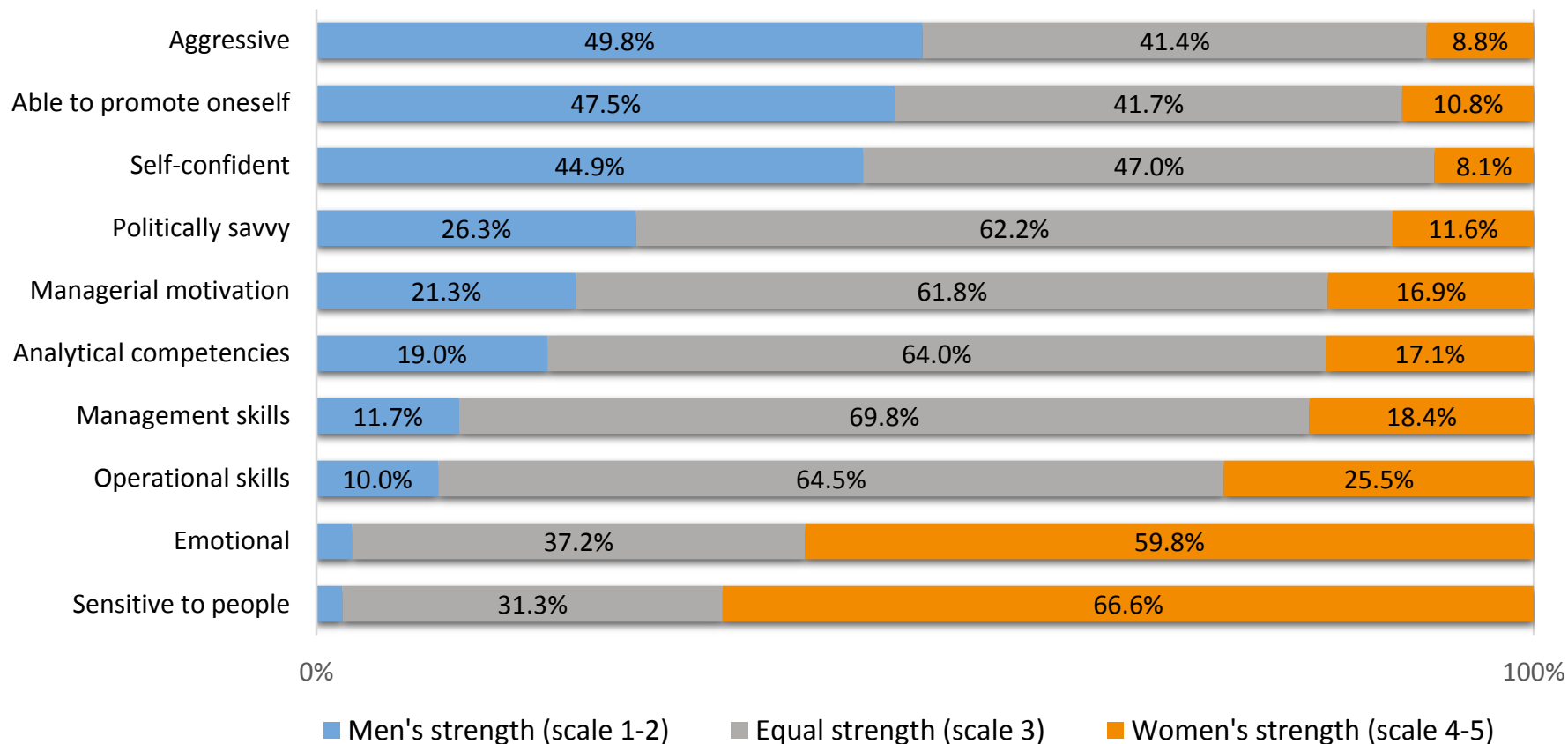
	have to accomplish more in order to achieve same success **	have to work harder for securing relationships w/ superiors **	have less advancement opportunities despite same qualification **	receive less support by mentors	face invisible barriers hindering their career path to the top **	are rather excluded from informal power networks	perform work which is less valued in relation to org. success	need more time for private obligations (children, family members) **
Germany	2.63	2.52	2.46	2.18	2.63	2.27	2.28	2.99
Austria	2.76	2.84	2.51	2.14	2.67	2.54	2.37	2.90
Switzerland	2.77	2.68	2.58	2.10	2.83	2.40	2.45	2.86
France	3.50	3.31	3.38	2.74	3.48	2.85	2.85	3.08
Belgium	2.83	2.71	2.47	2.13	2.69	2.45	2.52	3.06
Netherlands	2.41	2.39	2.23	1.91	2.45	2.19	2.20	2.79
United Kingdom	2.79	2.81	2.38	2.10	2.78	2.47	2.23	2.94
Denmark	2.25	2.30	1.98	1.89	2.27	2.04	1.90	2.41
Sweden	2.93	2.75	2.57	2.24	2.70	2.21	2.30	2.15
Norway	2.33	2.39	2.02	1.88	2.18	2.18	1.93	2.28

Gender issues in practice across Europe

	have to accomplish more in order to achieve same success **	have to work harder for securing relationships w/ superiors **	have less advancement opportunities despite same qualification **	receive less support by mentors	face invisible barriers hindering their career path to the top **	are rather excluded from informal power networks	perform work which is less valued in relation to org. success	need more time for private obligations (children, family members) **
Finland	2.90	2.69	2.63	2.25	2.82	2.49	2.38	2.63
Spain	2.59	2.77	2.50	2.24	2.80	2.31	2.39	3.02
Portugal	2.59	2.47	2.39	2.16	2.53	2.36	2.08	3.24
Italy	3.31	3.09	3.21	2.50	3.22	2.67	2.91	3.36
Greece	3.17	3.12	2.93	2.56	2.96	2.46	2.58	3.69
Croatia	2.91	2.85	2.58	2.22	2.77	2.46	2.51	3.46
Serbia	2.82	2.93	2.69	2.25	2.90	2.57	2.61	3.36
Romania	2.78	2.79	2.64	2.36	2.76	2.38	2.55	3.34
Poland	3.31	3.14	2.98	2.80	2.99	2.56	2.71	3.41
Russia	2.55	2.45	2.27	2.03	2.41	2.16	2.27	3.48

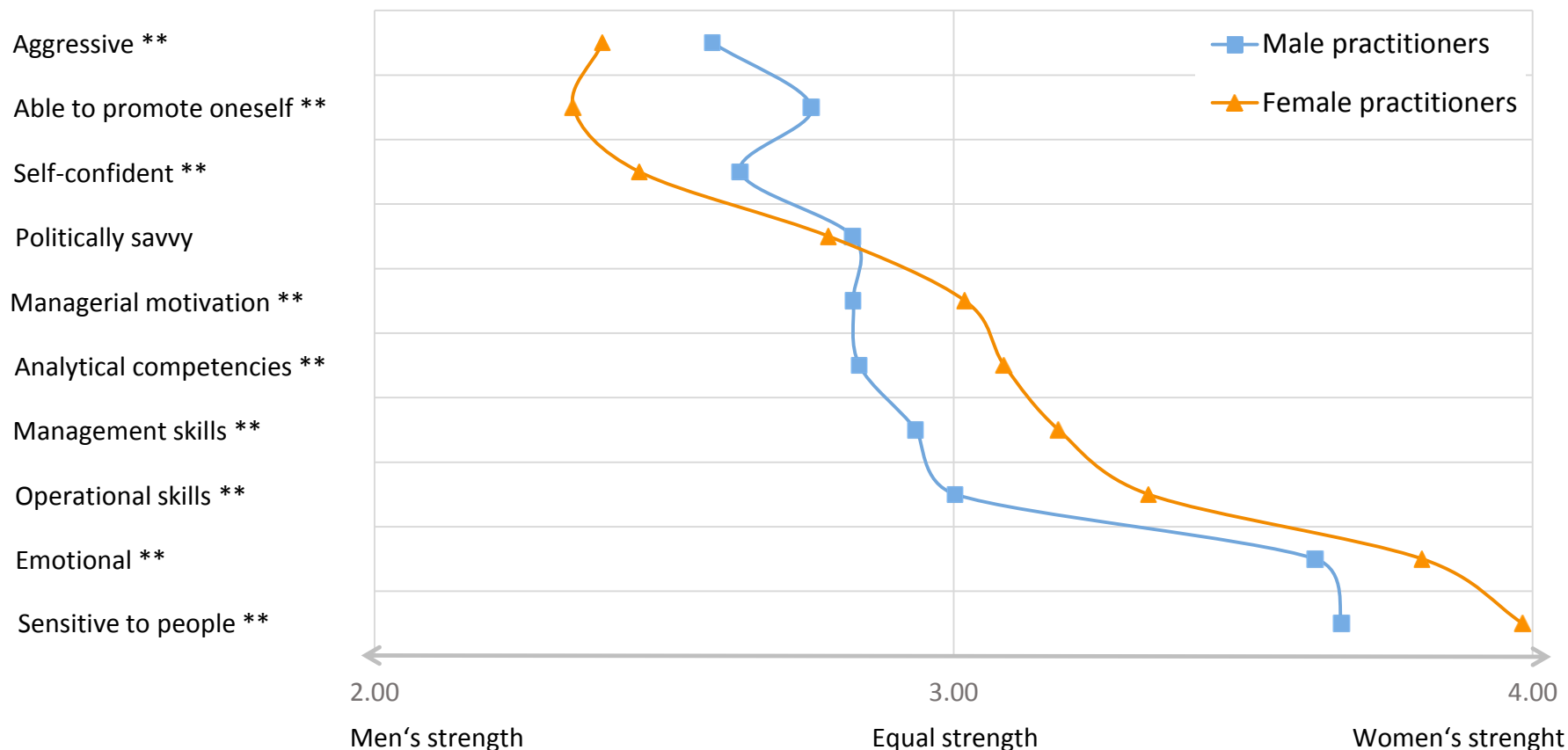
Gender traits: traditional prejudices are still prevalent in the profession – but management skills are more strongly attributed to women

Perceived distribution of personal traits among male and female professionals



Men and women attribute personal traits differently – with remarkable variations in the field of managerial motivation and management skills

Perceived distribution of personal traits among male and female professionals



www.communicationmonitor.eu / Zerfass et al. 2014 / n = 2,777 PR professionals. Q 23: How do you believe the following personal traits are distributed among male and female communication professionals? Scale 1-2 (Men's strength) – 3 (Equal strength) – 4-5 (Women's strength). Mean values.

** Highly significant differences (independent samples T-test, $p \leq 0.01$).

Salaries



Chapter overview

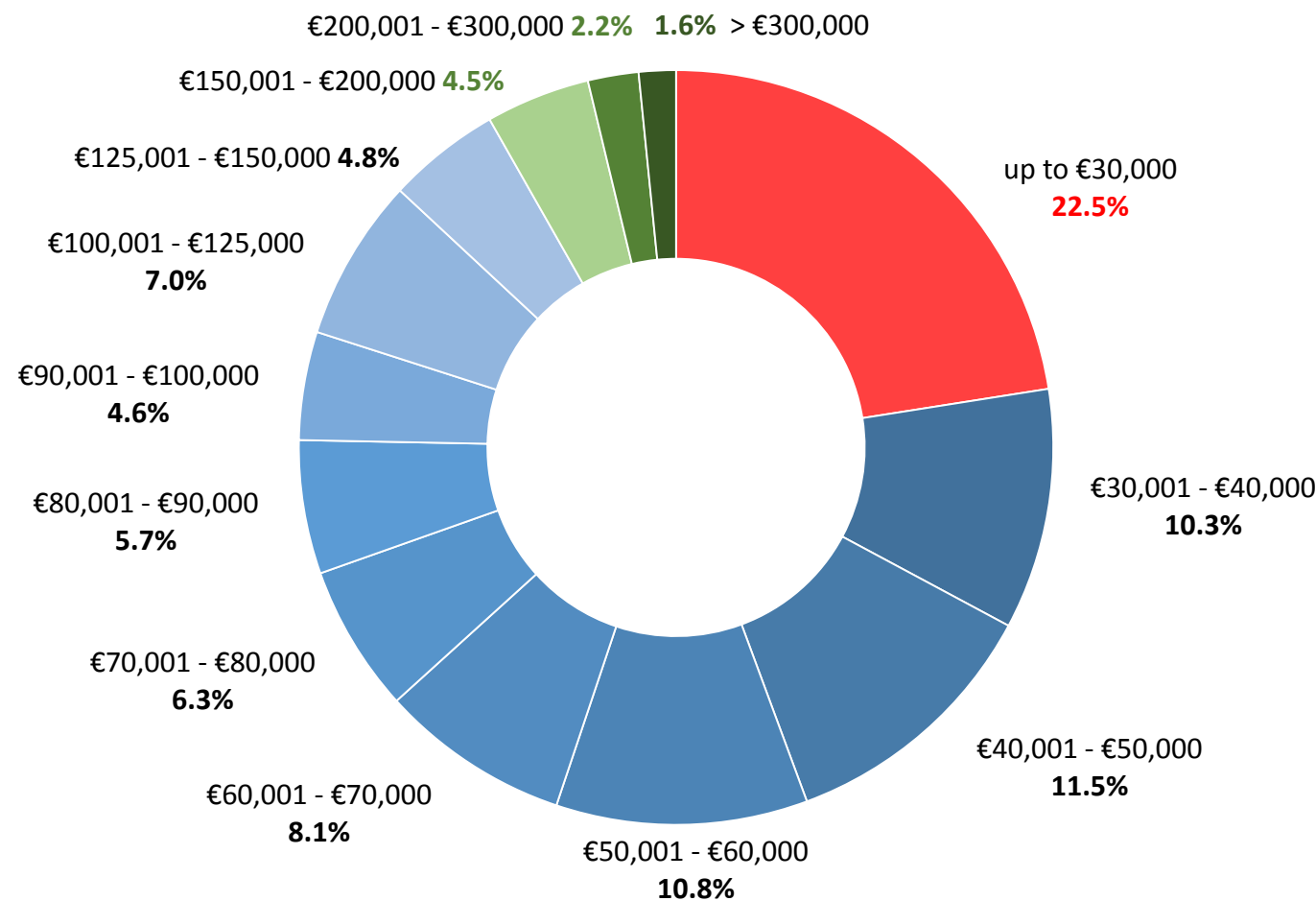
Each year the ECM data are analysed on the impact of demographic variables such as age, gender as well as hierarchical position and organisational type and how they affect the rates of pay across Europe. In 2014 a very small and similar proportion of the sample (8.3 per cent) compared with 2013 (9.0 per cent) reported a base salary of more than €150,000 per year. Drilling down further for 2014 only 1.6 per cent earn more than €300,000 annually. At the other end of the scale nearly a quarter (22.5 per cent) earn less than €30,000 per year, a similar figure to 2013. This figure is again influenced by respondents from Eastern Europe with many more professionals from Russia (52.5 per cent), Poland (60 per cent), and Romania (80.2 per cent) reporting earnings less than €30,000. Southern Europe also has a higher number in this pay category (Croatia, 75.9 per cent, Serbia 73.6 per cent). In sharp contrast, some countries in Northern and Western Europe report no practitioners at all in this range (Switzerland) or with very low numbers (Norway, 0.8 per cent, Finland, 0.7 per cent).

For heads of communication and agency CEOs the percentage of top earners also shows regional differences. Respondents from Northern and Western Europe report significant numbers earning more than €100,000 annually. This contrasts with some Southern and Eastern European countries such as Serbia and Romania where no one in the top positions earns over €150,000, whereas in Germany, the United Kingdom and Denmark approximately a sixth of the respondents earn this highest salary band. Switzerland is an outlier across Europe with 34.4 per cent of the top communicators earning over €150,000. Once again, the survey underlines that the profession reflects the different levels of development in economic terms across Europe.

Salaries correlate with membership in professional practitioner groups and member organisations. The ECM 2014 looked at membership within the European Association of Communication Directors (EACD) and compared annual salaries with other communication professionals. At the lower end it is significant to see that nearly a quarter (24.8 per cent) of non-members of the EACD earn less than €30,000 whereas only 8.2 per cent of members receive salaries in this lowest band. The findings suggest membership of the EACD correlates with consistently higher wage performance in all of the salary bands recorded. For example 43.1 per cent who are EACD members earn more than €100,000 against 16.4 per cent of other communication professionals in Europe.

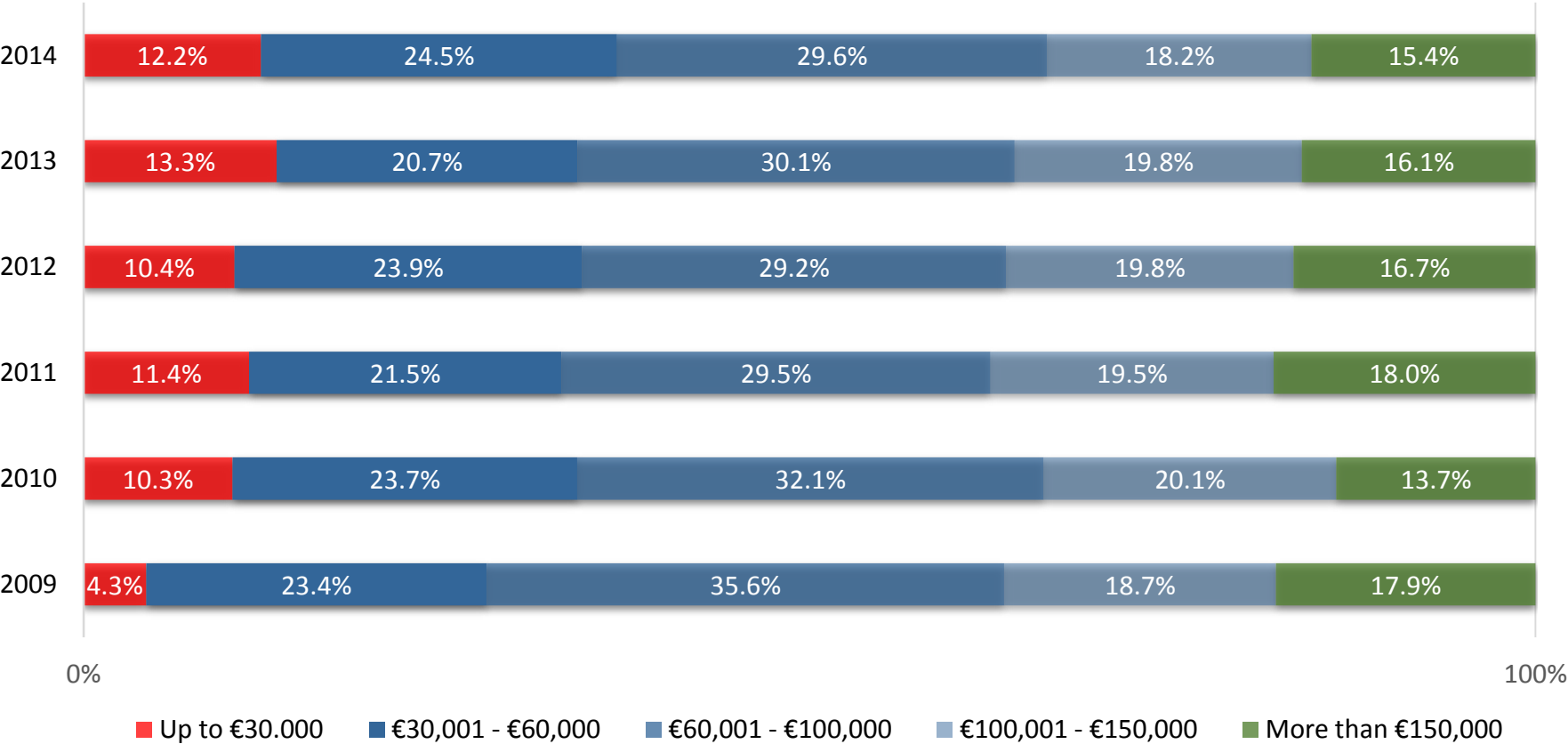
Any discussion of salary needs to focus on the gender pay differences, which again are demonstrated in the ECM data but with familiar and unsurprising results. For example looking at the highest position, heads of communication, nearly half (45 per cent) of male professionals earn over €100,000 whereas just less than a quarter (23.3 per cent) of female equivalents have the same remuneration. When comparing practitioners in the levels below head, a third (32.9 per cent) of females earn less than €30,000 and in contrast over three quarters (77.3 per cent) of men earn more than €30,000. So once again the pay divide is reflected across Europe with a high degree of consistency on the reported differences over the years that the monitor has been recording this data.

Basic annual salary of communication practitioners in Europe 2014



Development of salaries of top-level communicators

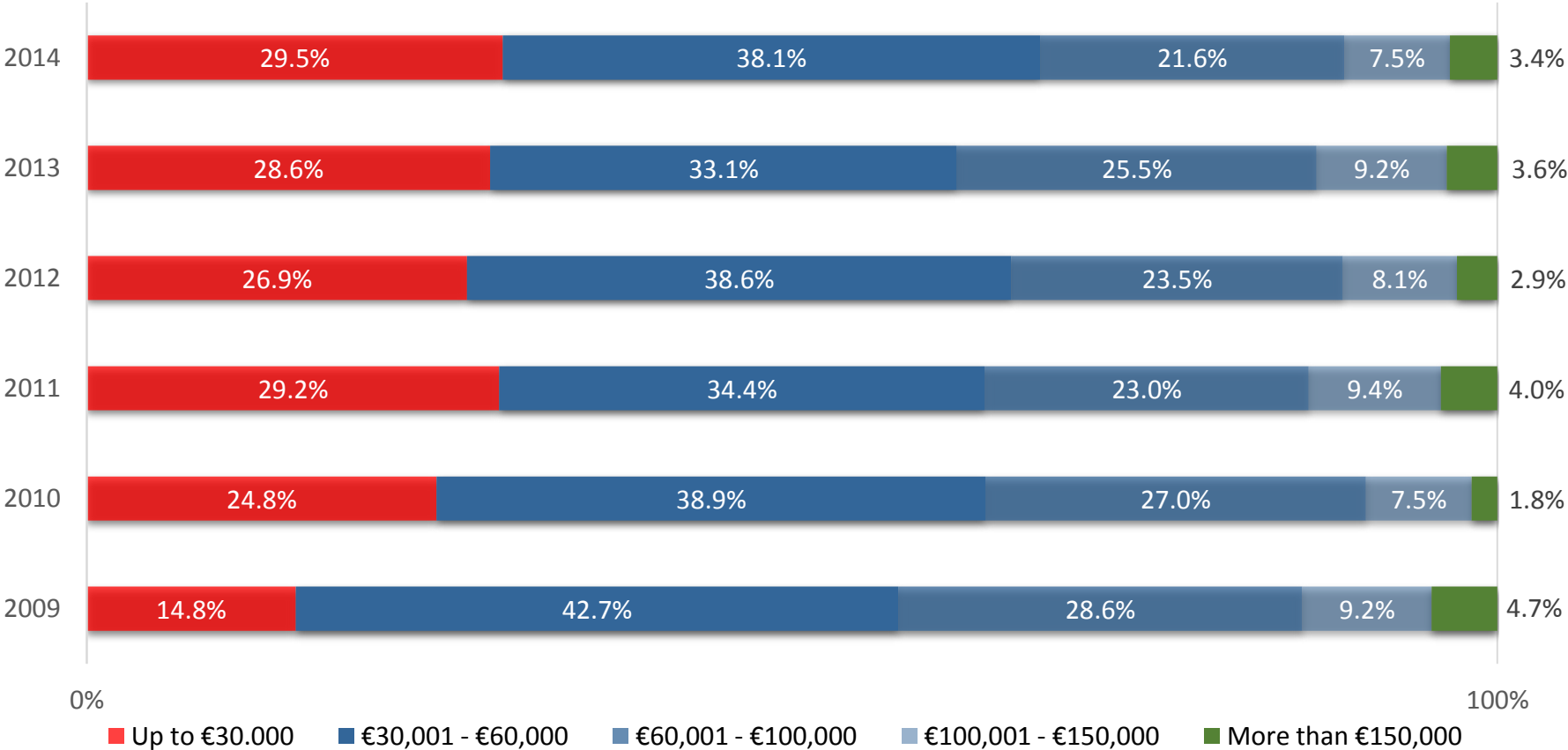
Basic annual salaries (heads of communication, agency CEOs)



www.communicationmonitor.eu / Zerfass et al. 2014 / n = 966 heads of communication / agency CEOs. 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 41: 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.

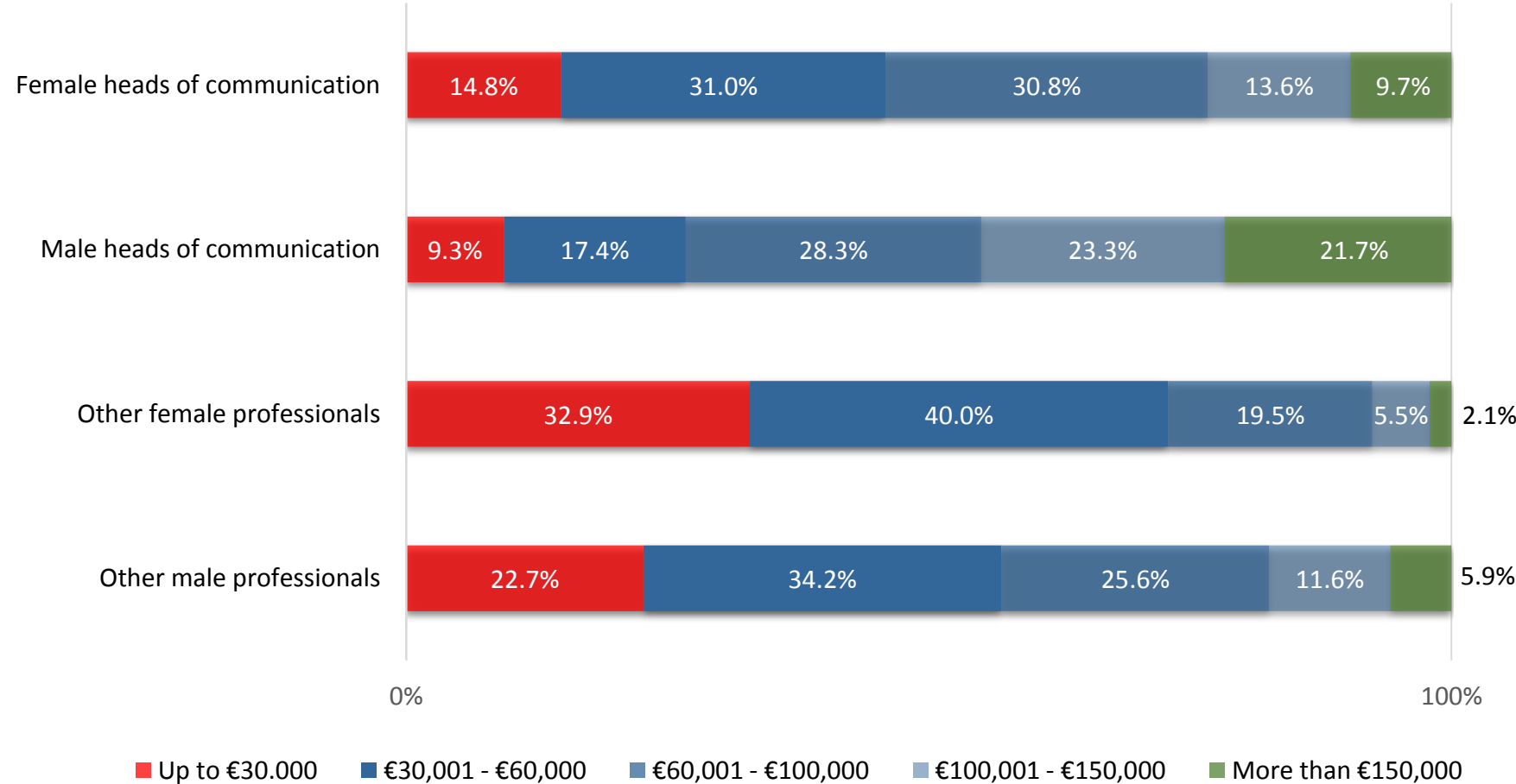
Salary development on other hierarchical levels

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



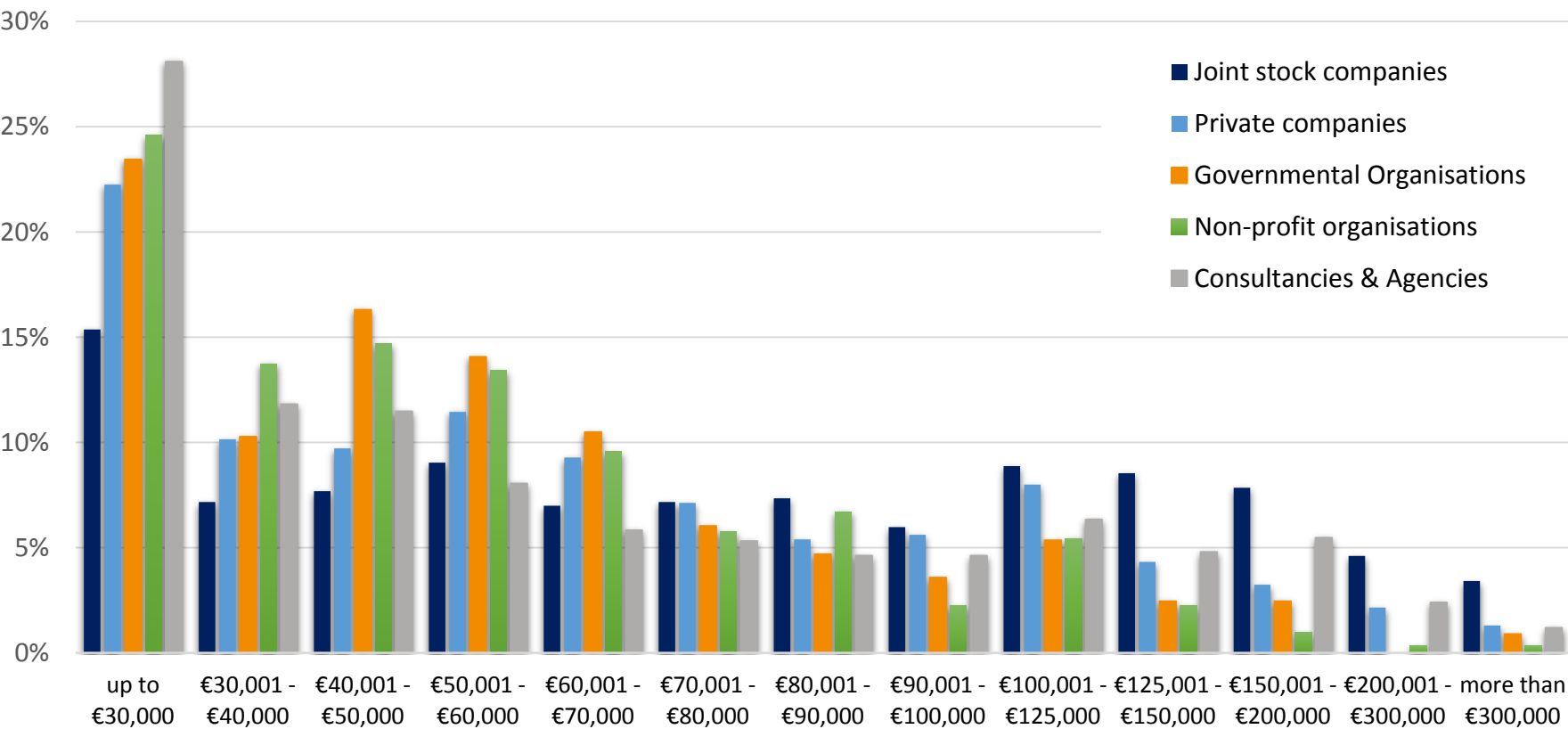
www.communicationmonitor.eu / Zerfass et al. 2014 / n = 1,428 PR professionals below the top level of the hierarchy. Q17. Zerfass et al. 2013 / n = 1,287. Q 39. Zerfass et al. 2012 / n = 1,013. Q 38. Zerfass et al. 2011 / n = 927. Q 20. Zerfass et al. 2010 / n = 879. Q 19. Zerfass et al. 2009 / n = 817. Q 41: 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

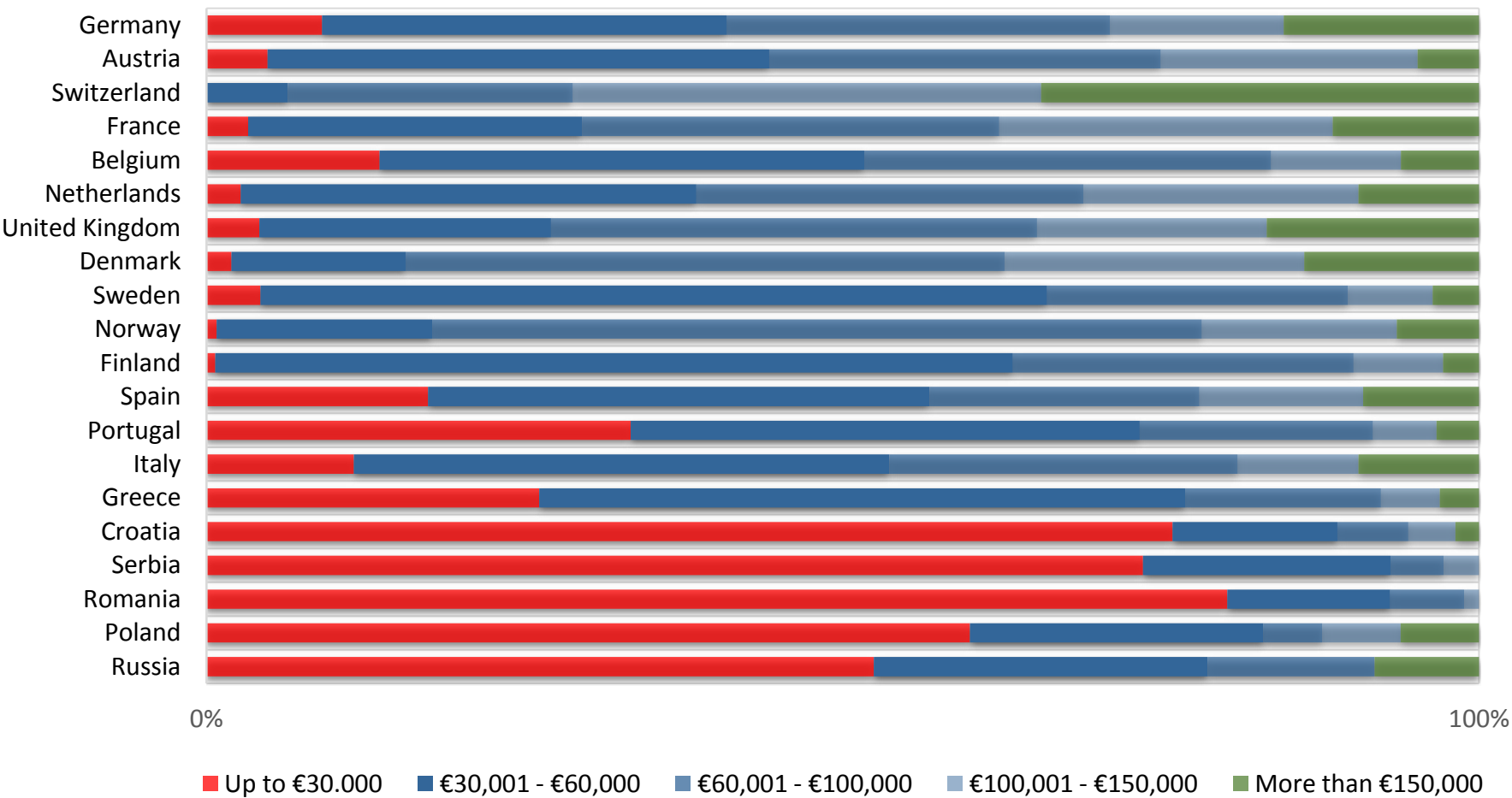


www.communicationmonitor.eu / Zerfass et al. 2014 / n = 2,394 PR professionals. Q 41: In which of the following bands does your basic annual salary fall? Highly significant differences for heads of communication (chi-square test, $p \leq 0.01$, Cramers V = 0.256). Highly significant differences for other professionals (chi-square test, $p \leq 0.01$, Cramers V = 0.191). Results may be influenced by the distribution of types of organisations and countries among both genders.

Annual salaries in different types of organisation



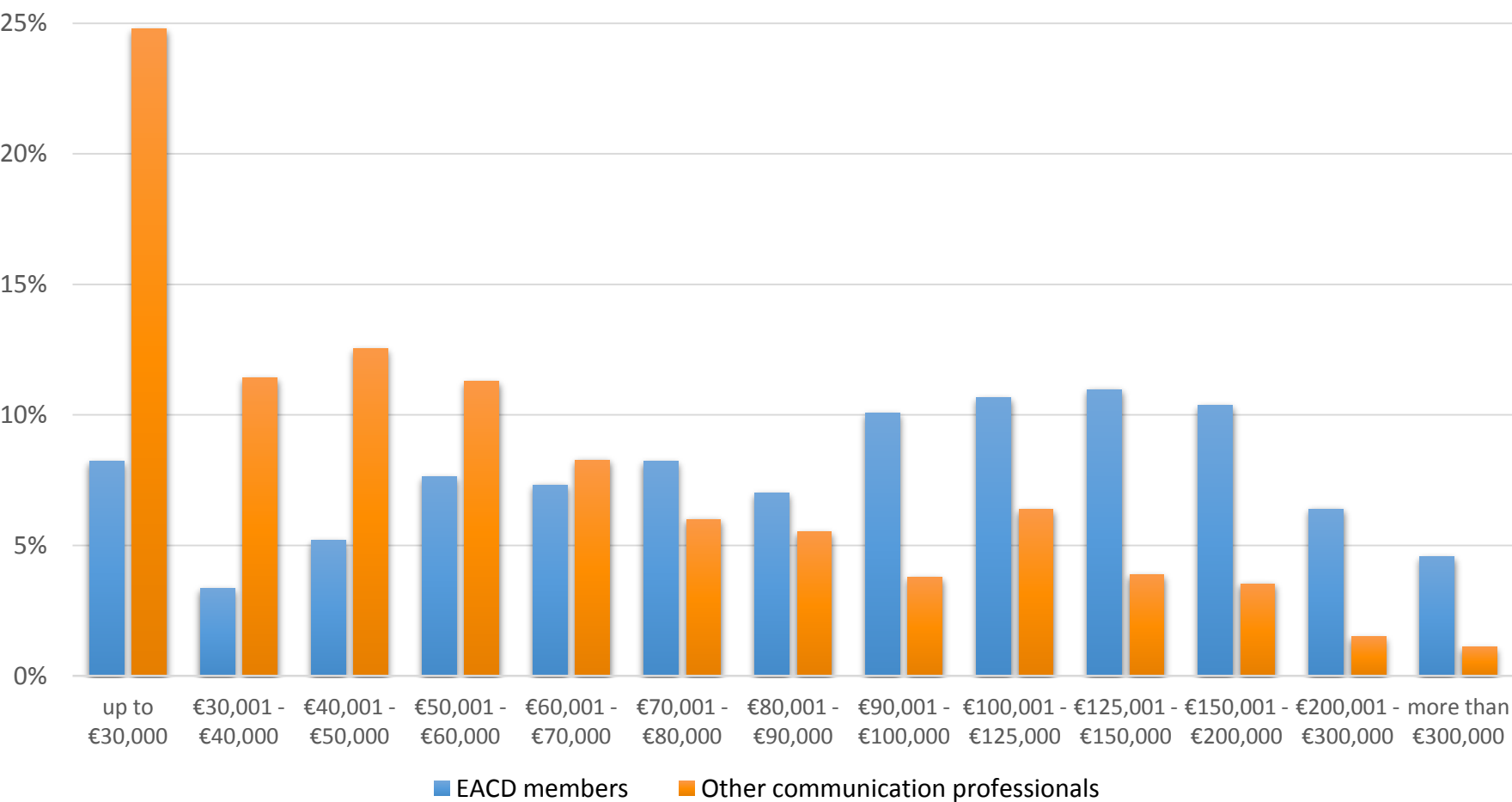
Annual salaries in different European countries



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	9.1%	31.8%	30.1%	13.6%	15.3%	Finland	0.7%	62.7%	26.8%	7.0%	2.8%
Austria	4.8%	39.4%	30.8%	20.2%	4.8%	Spain	17.4%	39.4%	21.2%	12.9%	9.1%
Switzerland	–	6.4%	22.4%	36.8%	34.4%	Portugal	33.3%	40.0%	18.3%	5.0%	3.3%
France	3.3%	26.2%	32.8%	26.2%	11.5%	Italy	11.6%	42.1%	27.4%	9.5%	9.5%
Belgium	13.6%	38.1%	32.0%	10.2%	6.1%	Greece	26.2%	50.8%	15.4%	4.6%	3.1%
Netherlands	2.7%	35.8%	30.4%	21.6%	9.5%	Croatia	75.9%	13.0%	5.6%	3.7%	1.9%
United Kingdom	4.2%	22.9%	38.2%	18.1%	16.7%	Serbia	73.6%	19.4%	4.2%	2.8%	–
Denmark	2.0%	13.7%	47.1%	23.5%	13.7%	Romania	80.2%	12.8%	5.8%	1.2%	–
Sweden	4.2%	61.8%	23.6%	6.7%	3.6%	Poland	60.0%	23.1%	4.6%	6.2%	6.2%
Norway	0.8%	16.9%	60.5%	15.3%	6.5%	Russia	52.5%	26.2%	13.1%	–	8.2%

EACD members enjoy a comparatively high annual salary



Characteristics of excellent communication functions



Chapter overview

Benchmarking approaches based on self-assessments are established methods to identify excellent organisations as well as drivers of excellence within a field. Such approaches have been used for a long time in business and management (Porter & Dale, 2004; Ritchie & Dale, 2000; Van der Wiele et al., 2000). On the other hand, excellence in communication management has been mainly defined through normative theories, which in turn have served as touchstone for empirical research (i.e. Grunig et al., 2006).

The ECM 2014 employs a new method to identify excellent communication functions, combining conceptual considerations with self-assessments of communication professionals and statistical analyses to identify characteristics which make a difference. The sample was divided between organisations with excellent communication functions 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 two dimensions, the first on advisory influence and executive influence, and the second on overall communication success and department competence. Only organisations clearly outperforming in all four dimensions (values 6 or 7 on a 7-point-scale) are considered as excellent in the benchmark exercise.

The analysis revealed that approximately one out of five communication functions in the sample can be considered excellent (21.2 per cent). The highest proportion can be found in joint stock organisations (24.9 per cent), whereas excellence is less prevalent in government-owned, public sector and political organisations (16.0 per cent).

There are significant differences between excellent and normal communication functions. Excellent communication functions have stronger alignment with top management, as the head of communication is more often part of the executive board or reporting directly to the CEO. In those departments, 81.1 per cent of the professionals act as strategic facilitators who plan and execute communications, but at the same time help to define new business strategies – compared to 52.7 per cent in other organisations. Excellent functions also have different priorities. They are less concerned with linking business strategy and communication, as many have probably established routines for alignment. However, they are more involved with corporate social responsibility and CEO positioning. Practitioners working in excellent departments are better prepared to know how to deal with new technologies, but they also report more work pressure. There is more overtime in excellent functions, but practitioners experience higher levels of job satisfaction. Most interestingly and related to discussions in previous chapters, there is also a significantly higher level of gender equality in organisations with an excellent communication function.

These results indicate that there are differences between excellent and other, normal communication functions in Europe not only in technical proficiency of doing communication, but also regarding worldviews. In that respect organisations with excellent communication functions are not simply better at communication, they are communicatively different. Further research is needed to explain this linkage between technical proficiency and social reflexivity. The results demonstrate that strategic communication is more than a craft and that to practice it well practitioners need a profound understanding of business, organisations and society.

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

(Q30)

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

EXECUTIVE INFLUENCE

(Q31)

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

SUCCESS

(Q32)

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

COMPETENCE

(Q33)

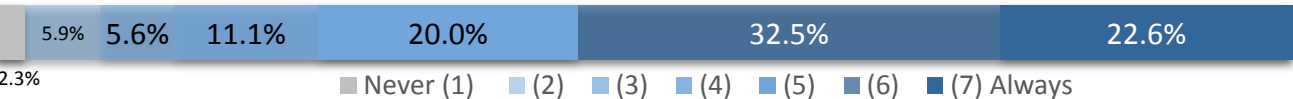
The quality and ability of the communication function is (much) better compared to those of competing organisations

Excellent communication functions

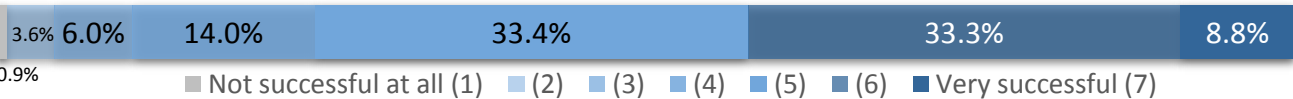
Advisory influence



Executive influence



Success

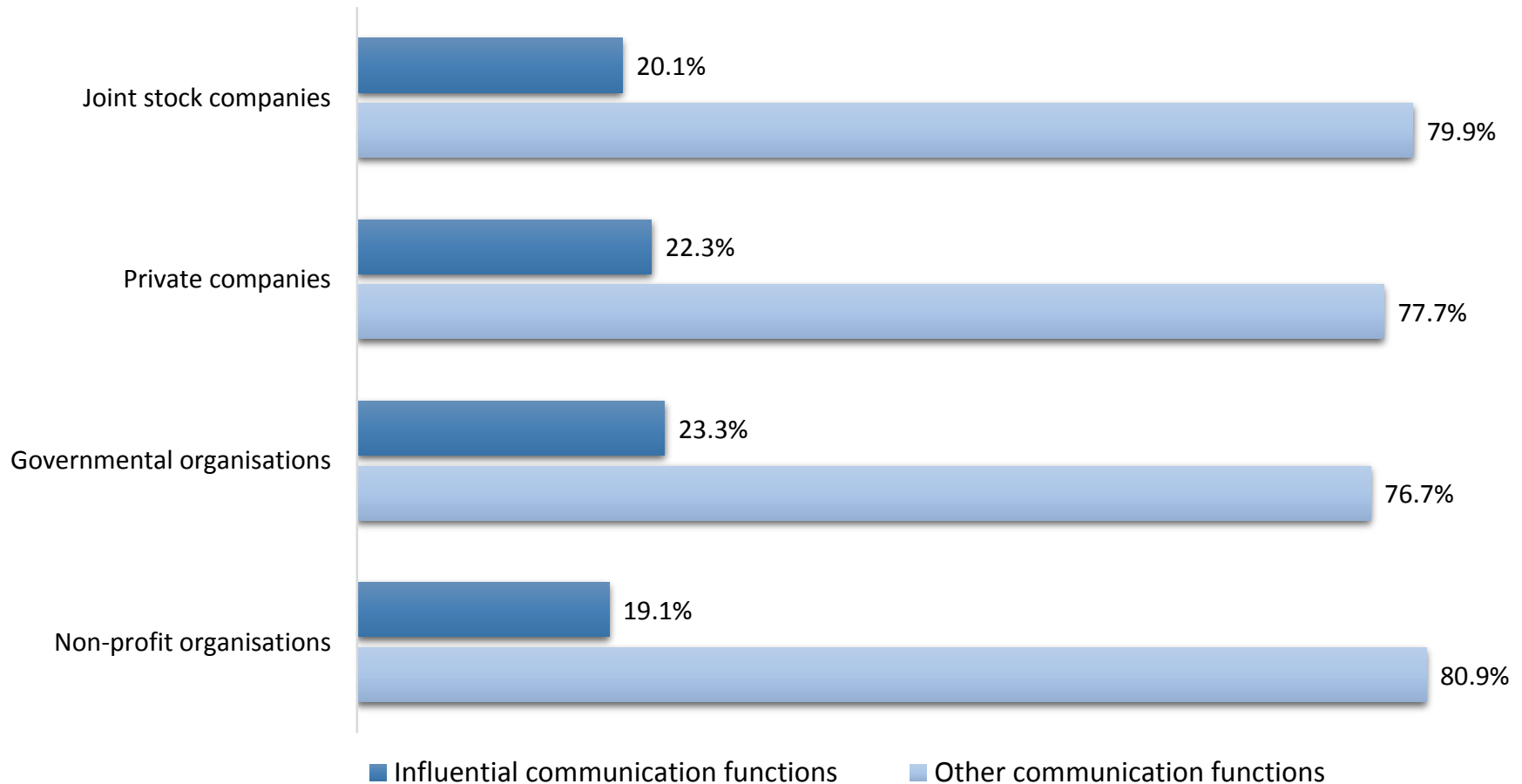


Competence



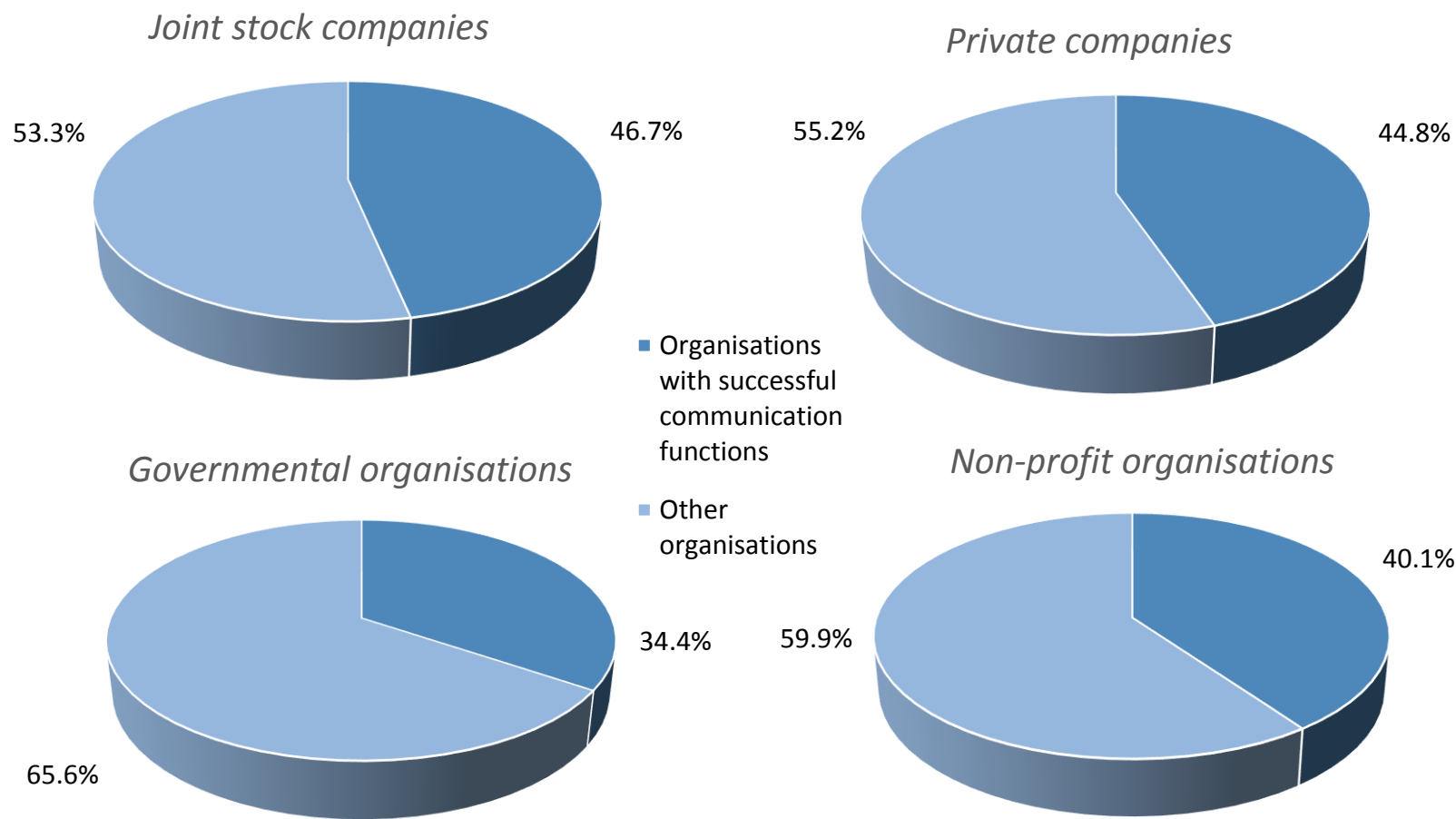
www.communicationmonitor.eu / Zerfass et al. 2014 / n = 2,090 PR professionals in communication departments. Advisory influence, Q 30: In your organisation, how seriously do senior managers take the recommendations of the communication function? Executive influence, Q 31: How likely is it, within our organisation, that communication would be invited to senior-level meetings dealing with organisational strategic planning? Q 32: In your opinion, how successful is the communication of your organisation in general? Q 33: 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: governmental organisations are leading the field



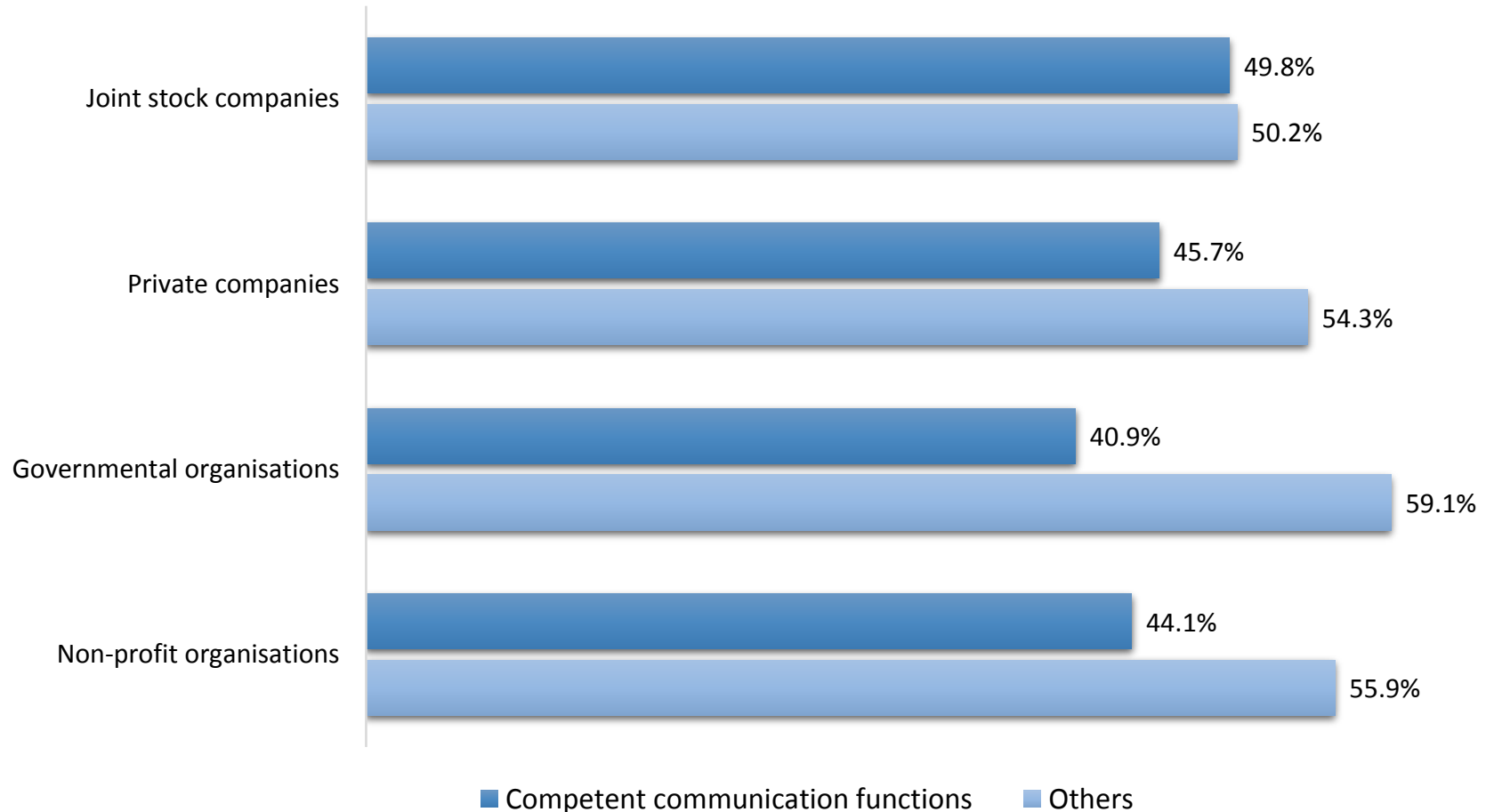
www.communicationmonitor.eu / Zerfass et al. 2014 / n = 2,090 PR professionals in communication departments. Advisory influence, Q 30: In your organisation, how seriously do senior managers take the recommendations of the communication function? Scale 1 (not seriously) – 7 (very seriously). Executive influence, Q 31: 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). Percentages: Influential communication functions, based on scale points 6-7.

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

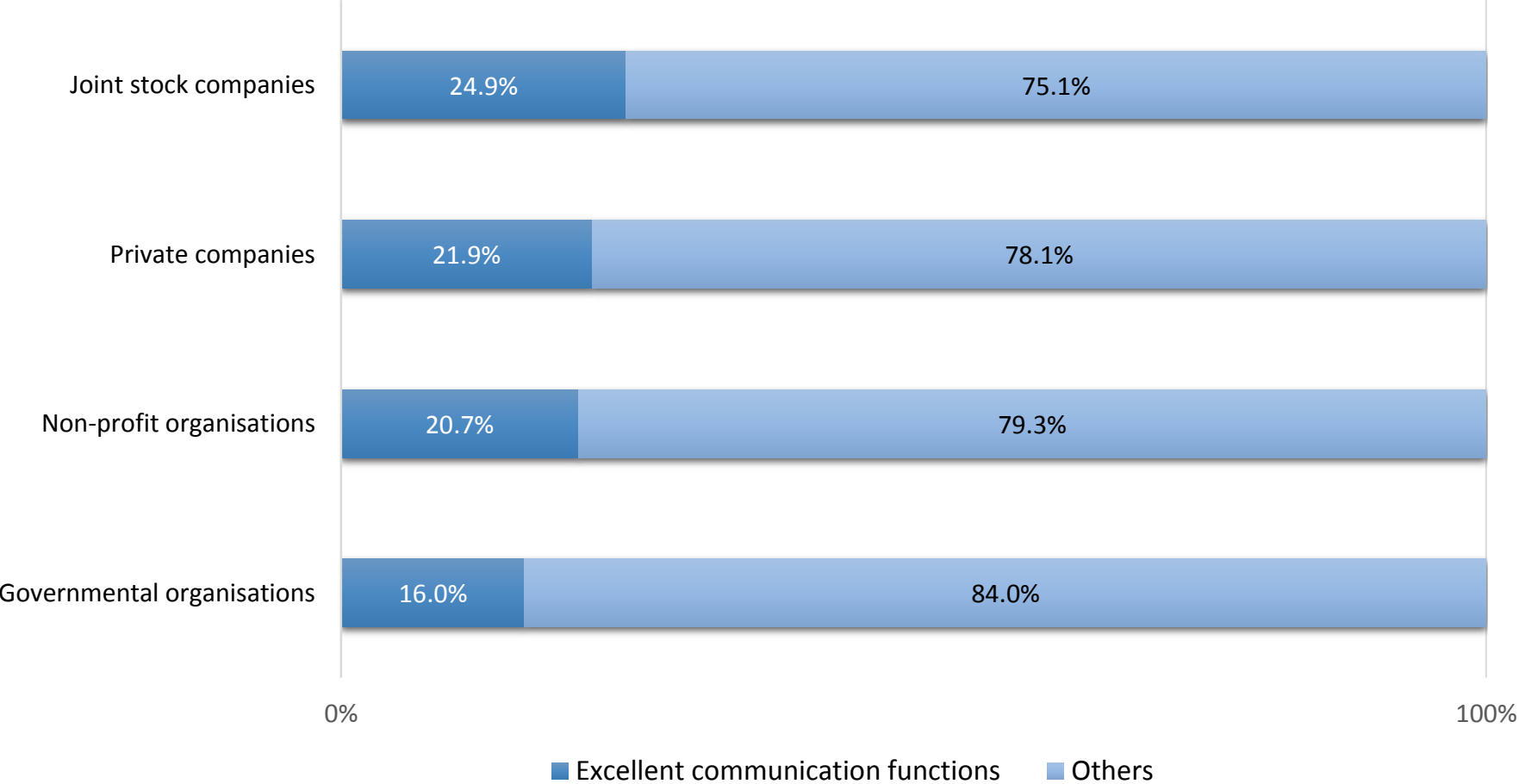


www.communicationmonitor.eu / Zerfass et al. 2014 / n = 2,090 PR professionals in communication departments. Q 32: In your opinion, how successful is the communication of your organisation in general? Percentages: Successful organisational communication based on scale points 6-7. Highly significant differences (chi-square test, $p \leq 0.01$, Cramér's $V = 0.099$).

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



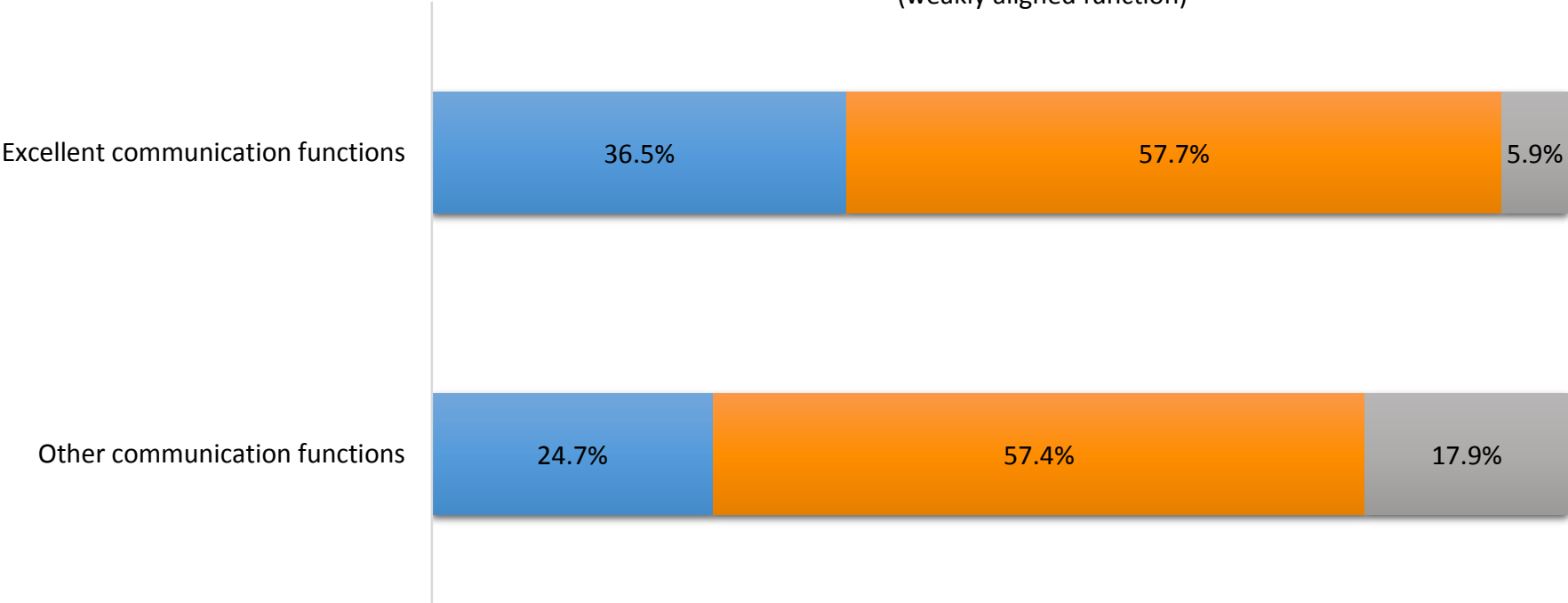
Excellent communication functions in different types of organisations



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

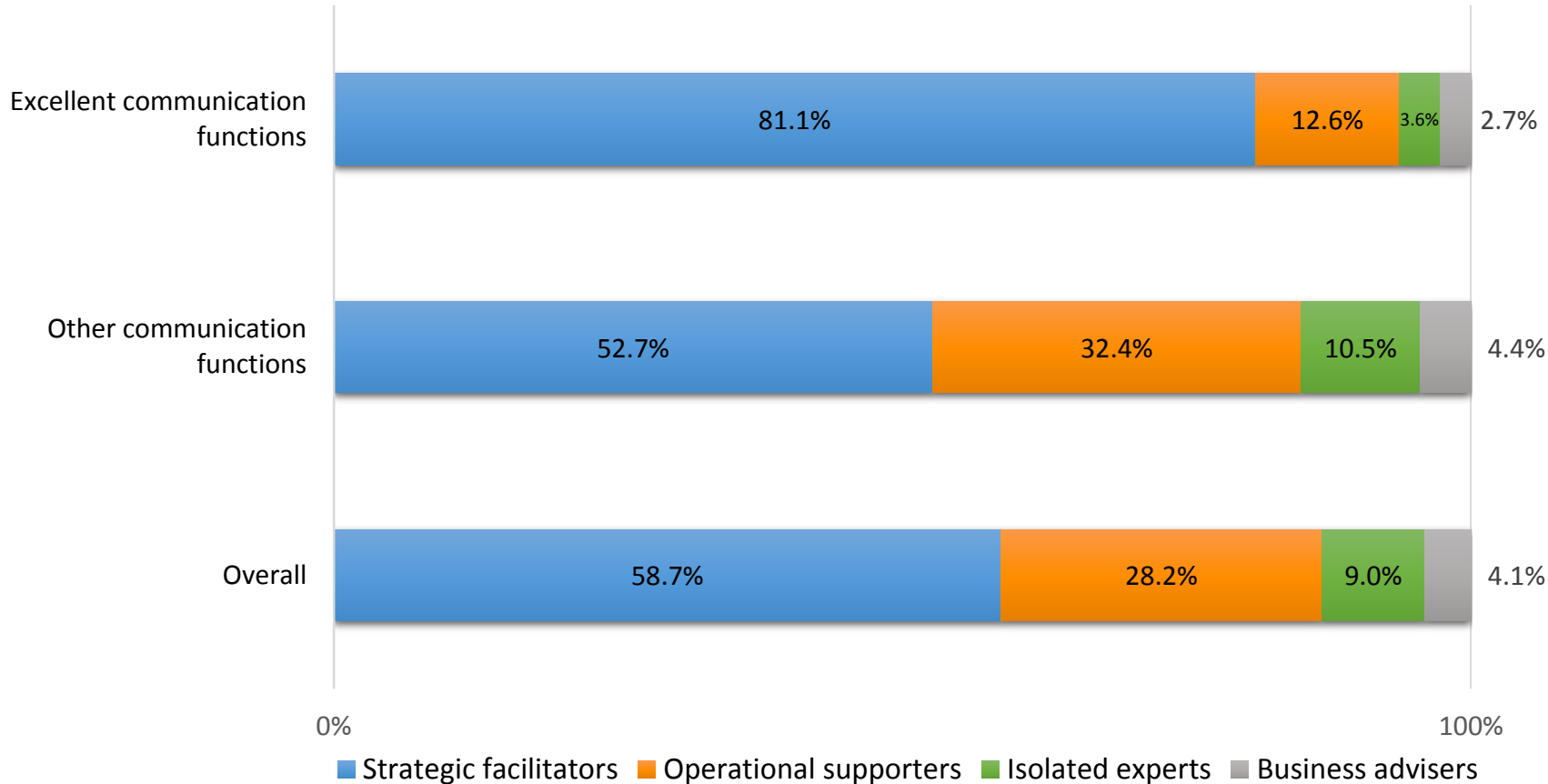
The top communication manager / chief communication officer ...

- is a member of the executive board (strongly aligned function)
- reports directly to the CEO or top-decision maker (aligned function)
- does not report directly to the CEO or top decision-maker (weakly aligned function)



Excellent communication departments employ significantly more professionals with stronger focus on business goals and strategy

Enactment of professional roles by practitioners



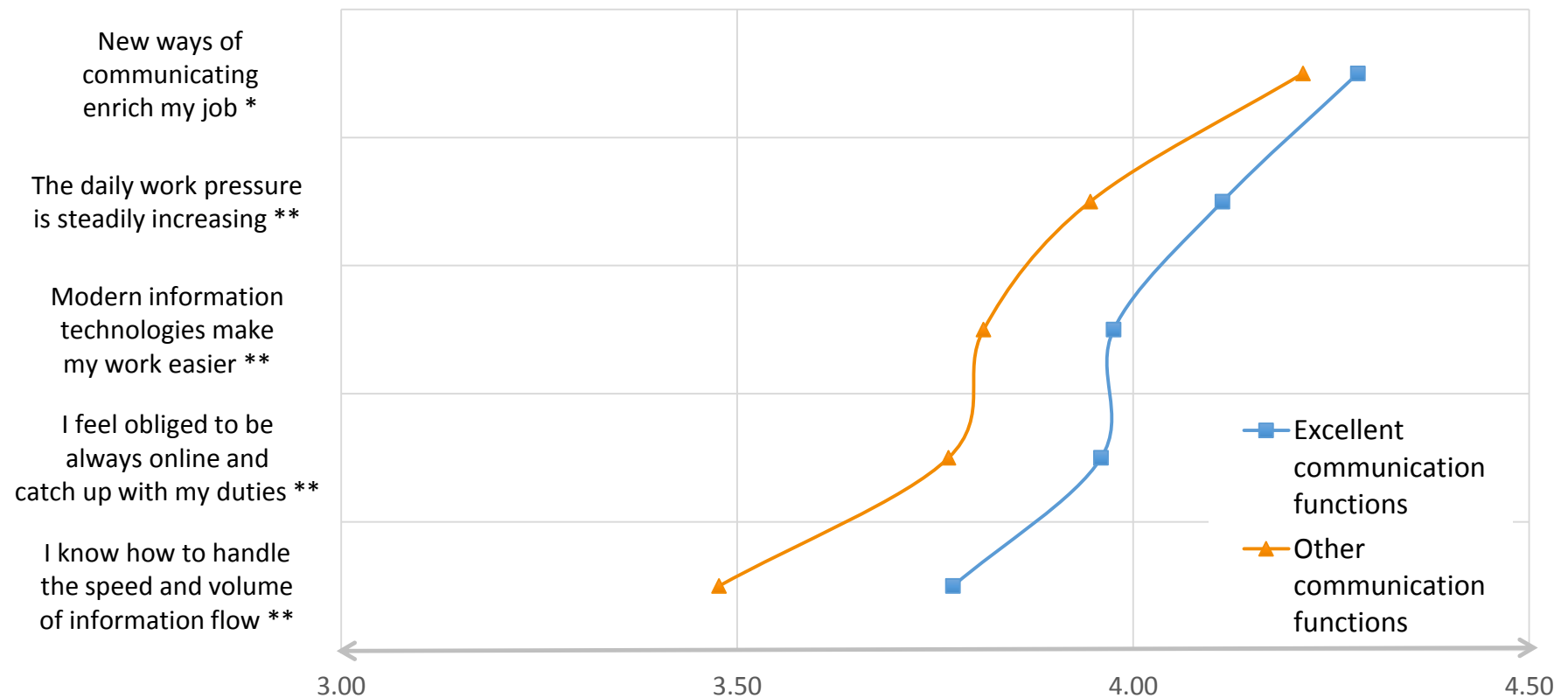
www.communicationmonitor.eu / Zerfass et al. 2014 / n = 2,090 PR professionals in communication departments. Q 17: In your daily work, how much do you focus on supporting business goals by planning and executing communication? Scale 1 (Not at all) – 7 (Very much). / ... do you feel responsible for helping to define business strategies? Scale 1 (Never) – 7 (Always). Highly significant differences (chi-square test, $p \leq 0.01$, Cramér's $V = 0.237$).

Top issues: Excellent functions are less concerned about missing links to business goals, but are more involved with CSR communication and CEO positioning



Professionals working in excellent departments are better prepared to know how to deal with new technologies, but they also report more pressure

Impact of new technologies and the rising importance of strategic communication



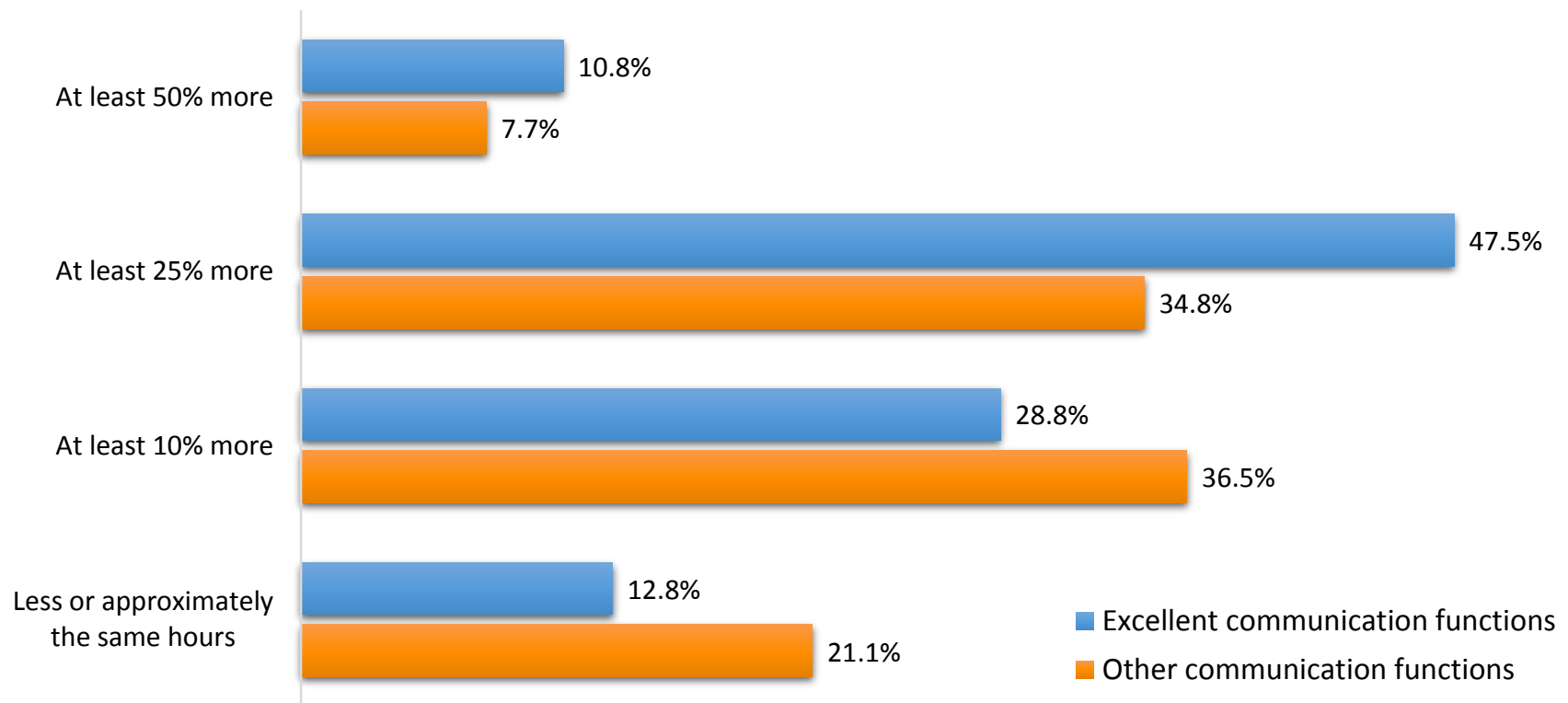
www.communicationmonitor.eu / Zerfass et al. 2014 / n = 2,090 PR professionals in communication departments. Q 1: The rising importance of strategic communication and new technologies have changed the job routines of communication professionals. Please state whether you agree with these statements.

Scale 1 (Strongly disagree) – 5 (Totally agree). Mean values. * Significant differences (Kendall rank correlation, $p \leq 0.05$).

** Highly significant differences (Kendall rank correlation, $p \leq 0.01$).

Excellent communication functions are characterised through more overtime work

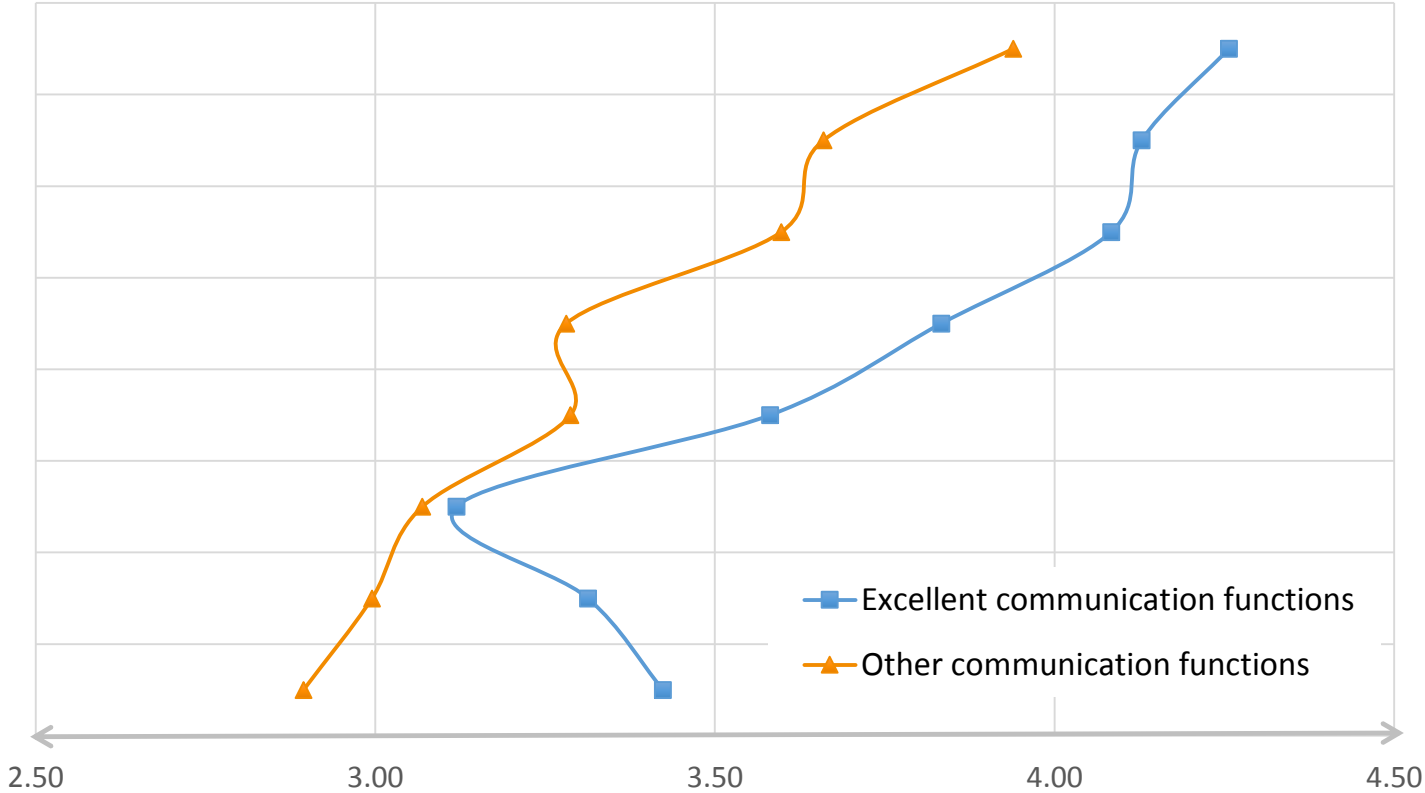
Working hours in an average week (compared to the employment/job contract)



Professionals working in organisations with excellent communication functions report a higher level of job satisfaction

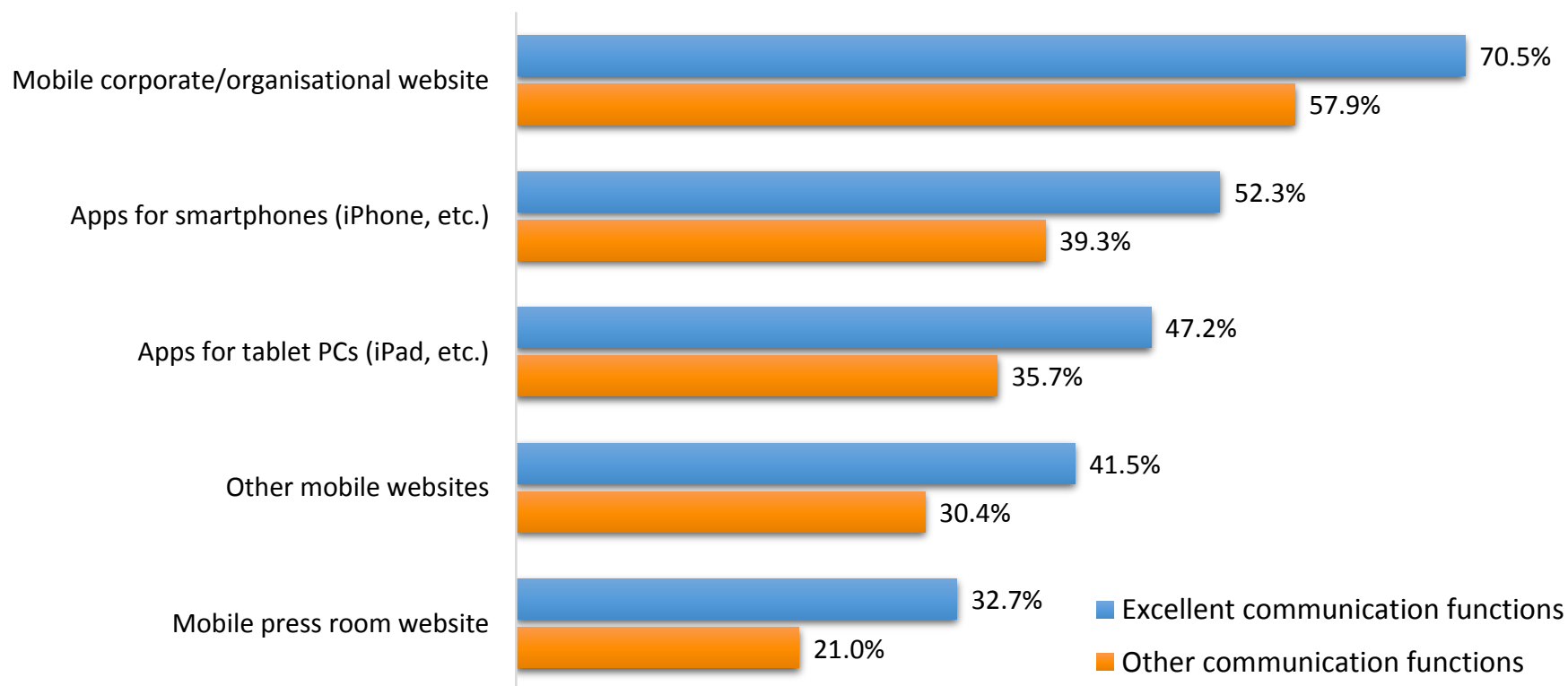
Assessment of the job situation

- My tasks are interesting and manifold **
- Overall, I am satisfied with my job ****
- Superiors and (internal) clients value my work **
- The job has a high status **
- My job is secure and stable **
- My work-life balance is all right
- The salary is adequate **
- I have great career opportunities **

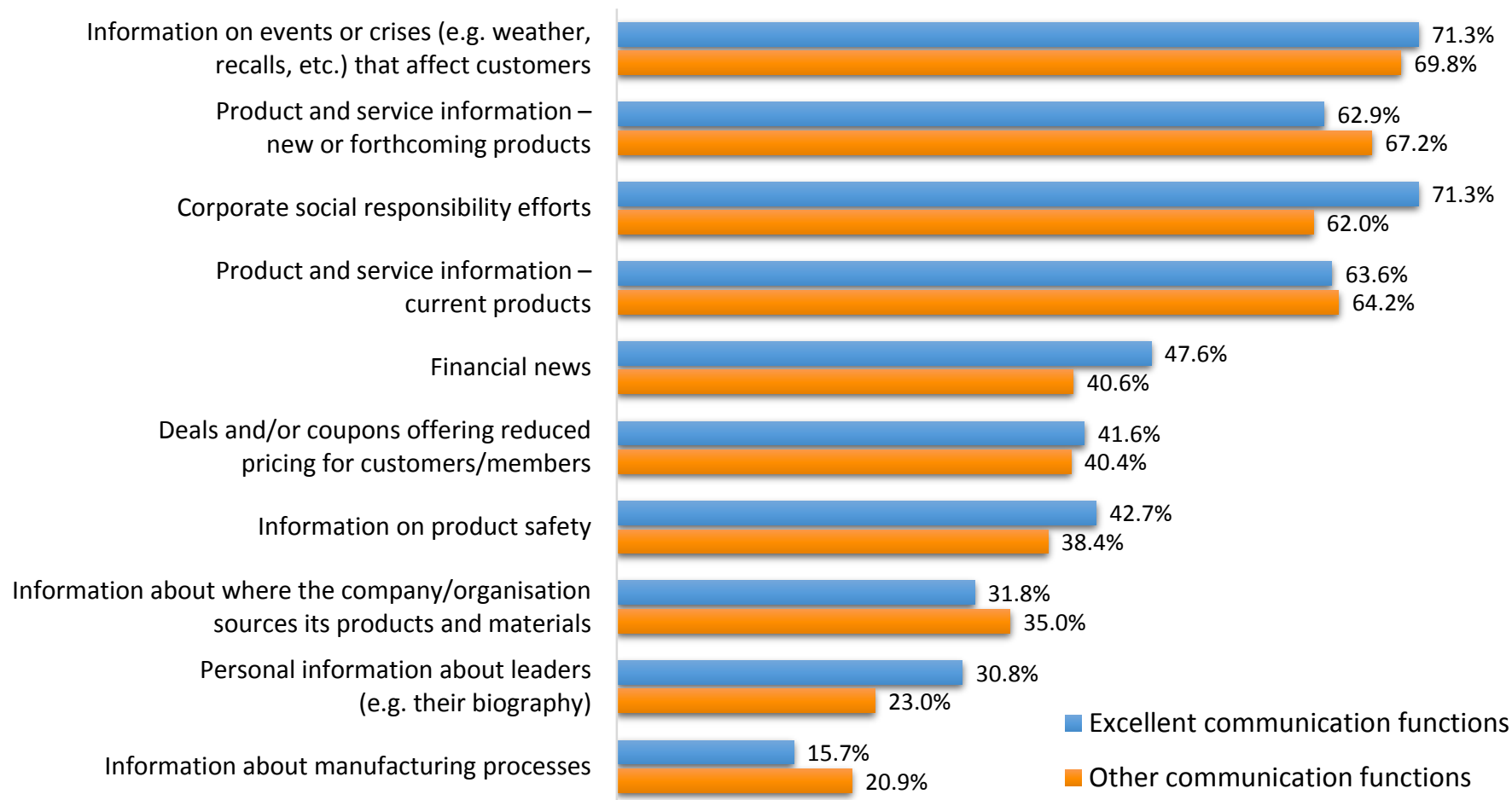


Organisations with excellent communication functions are pioneers in mobile communication

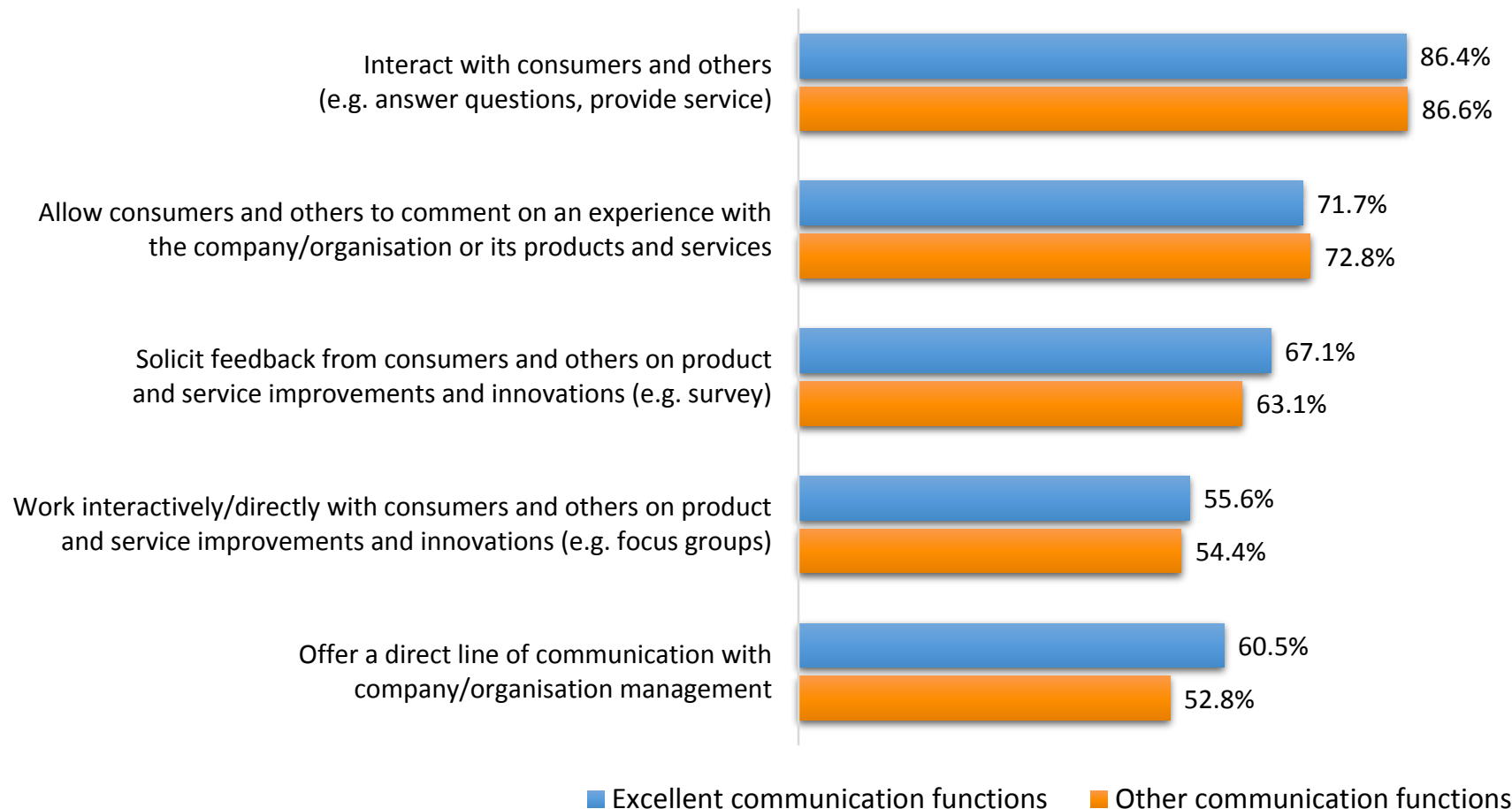
Implementation of applications for smartphones and tablet computers



Organisations with excellent functions report a stronger stakeholder demand for CSR, financial, and leadership communication on social media



Excellent communication functions argue more often that stakeholders demand direct communication with top management



Gender equality is more prevalent in organisations with excellent communication functions

In my organisation female compared to male practitioners ...

need more time for private obligations
(children, other family members, etc.)

have to accomplish more in order to
achieve the same success **

have to work harder for securing quality, long-term
relationships with superiors or top executives **

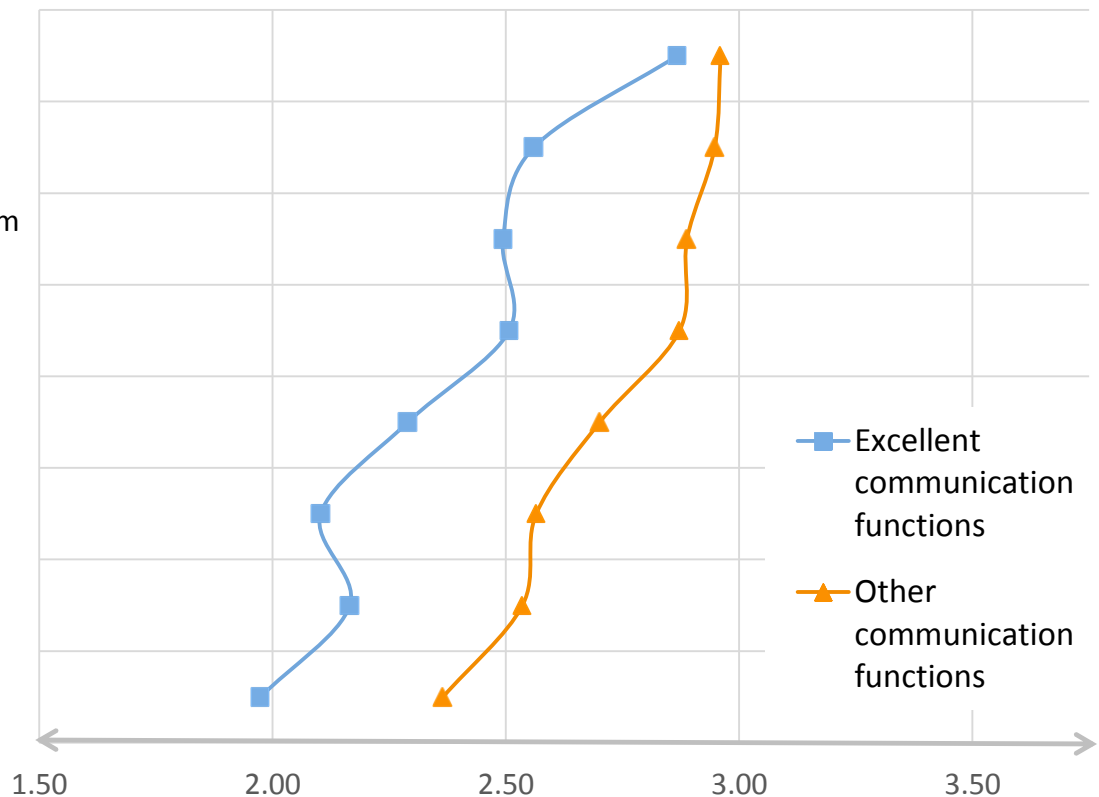
face invisible barriers hindering their
career path to the top **

have less advancement opportunities
despite holding the same qualifications **

perform work which is less valued in
relation to organisational success **

are rather excluded from
informal power networks **

receive less support by mentors **



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A man with a grey beard and glasses, wearing a light blue shirt and a grey sweater, is leaning over a chalkboard. He is writing on the board with chalk. The chalkboard has some mathematical notations on it, including H_0 , H_1/H_0 , and a large curly brace. The text "provide proof" is overlaid on the image in a white, sans-serif font.

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