

SUMMARY

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European Communication Monitor 2007: Trends in Communication Management and Public Relations

The field of public relations is growing significantly throughout Europe. Professionals working in communication departments and agencies expect a 14% growth of budgets and many new jobs in 2008. However, the framework for communication management is changing rapidly. Both the dominant fields of practice and relevant instruments used to contact stakeholders will be redefined during the next years. Practitioners are asked to identify those developments and deal with the odds and challenges that affect their daily business in the information society.

Valuable insights into the evolution of Public Relations in Europe

The European Communication Monitor 2007 is the first transnational survey on future trends in communication management and public relations in Europe. It is an international research project serving solely academic purposes, supported by the European Public Relations Education and Research Association (Euprera), a network of leading scholars from more than 30 countries, and conducted by a research team from the Universities of Leipzig, Amsterdam, Bucharest, Ljubljana and the Stockholm School of Economics, led by Prof. Dr. Ansgar Zerfass, Germany.

Based on a sample of 1,087 professionals from 22 countries with a thorough level of experience (average age 41.3 years, every second with more than 10 years of experience in the field), this research lays a solid ground for identifying major developments in communication management and public relations. However, as there is no knowledge about the population of communication departments and agencies in Europe, the findings presented here can not claim representativeness. Personal invitations for the online survey have been sent to more than 20,000 professionals throughout Europe via e-mail in April and May 2007. Additional invitations were made via national branch associations, executive education programs and press releases (partly self-recruiting). Statistical analysis has been used to reveal significant differences between various groups of respondents (communication departments vs. agencies, B2B vs. B2C, age groups, ...) and to stimulate discussion about different segments of the market. As the use of professional terminology and PR practice has been considered rather standardized throughout Europe, national specific aspects were not taken into account. Moreover, respondents have been considered proficient users of English language; therefore it was assumed that no ambiguity was related to language issues.

The full documentation with numerous charts is available online at www.communicationmonitor.eu:

Zerfass, A., Van Ruler, B., Rogojinaru, A., Verčič, D., & Hamrefors, S. (2007):
European Communication Monitor 2007. Trends in Communication Management and Public
Relations – Results and Implications. Leipzig: University of Leipzig/Euprera, 52 pp.

New weight of disciplines within communication management

An analysis of the various disciplines within communication management shows that marketing/brand and consumer communication, corporate communication and crisis/issues management are the most important fields of practice nowadays. However, corporate communication will gain in importance and be number one until 2010. Internal/change Communication and community relations/CSR are the fastest-growing disciplines.

Most important disciplines in communication management in Europe (sample chart)

Today		In 2010		
1	Marketing/Brand and Consumer Communication	1	Corporate Communication	↗
2	Corporate Communication	2	Marketing/Brand and Consumer Communication	↘
3	Crisis / Issue Management	3	Internal Communication and Change Management	↑
4	Internal Communication and Change Management	4	Crisis / Issue Management	↘
5	Public Affairs / Lobbying	5	Community Relations, CSR	↑

www.communicationmonitor.eu / Zerfass et al. 2007 / n = 1,087 PR Professionals from 22 countries

Thinking of the channels and instruments, it becomes clear that public relations goes online at a very high speed, whereas press and media relations loose ground. Addressing journalists keeps being a significant part of public relations. But within three years the most important addressees are working for the online media, not print or broadcast. In spite of recent arguments against the Web 2.0 hype, respondents are convinced that the use of online communication and social media as a tool to reach stakeholders without engaging the mass media is growing rapidly.

Comparisons between the answers from agencies and communication departments show that consultants underestimate the value of personal and nonverbal communication. They tend to think in terms of media production and neglect the chances of direct interactions. On the contrary, companies are less convinced by social media and sponsoring.

Addressing tomorrow`s customers, co-workers and opinion leaders

Public relations needs a complete new set of instruments and competencies to reach young people. Online communication, social media and mobile channels are most effective. High-end technological platforms have to be complemented by real-life interactions, which may be enabled by personal communication and events. This offers great opportunities for crossmedia concepts and word-of-mouth campaigns. Today's routines in communication management which are focused on using print media and TV/Radio as multipliers may look outdated very soon. Less than 20% of the respondents think that print media are effective to communicate with the young generation.

A new agenda for communication management and public relations in Europe

The survey tried to identify those issues that will become most relevant until 2010. Unanimously, three three major challenges showed up: coping with the digital evolution, linking business strategies and communication, and maintaining trust. Nearly every second questioned gives top priority to those issues within the next three years.

On a broader scale, the most important issue to be dealt with is the intertwining complex of social change, that brings about active audiences and the quest for more transparency, and the rise of truly interactive communication on the web, which brings about new configurations of symmetry and power. Communication controlling is a major challenge for the profession, combining two strongly linked aspects: advancing communication strategies by establishing value links to corporate strategy, and implementing trusted methods and performance indicators for communication measures.

Challenges for communication management in Europe (sample chart)

Most important issues within the next three years		
1	Coping with the digital evolution and the social web	48,9%
2	Linking business strategy and communication	45,6%
3	Building and maintaining trust by authentic communication	43,4%
4	Dealing with the demand of new transparency and active audiences	36,3%
5	Establishing new methods to evaluate and demonstrate the value of communication	31,4%

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Trust and public relations

Building trust is a major challenge for public relations – it needs open communication, dialogue and authenticity. Nine out of ten PR professionals in Europe identify authentic, dialogical and open communication as the main lever for building and obtaining trust. However, nowadays' communication strategies are called into question: only 60% of those working in the field think that public relations can create sustainable trust, and even less are convinced that this can be measured.

Press and media relations are not able to reconstitute trust in corporations and institutions on their own. Additional strategies like positioning personalities and corporate brands are necessary to establish authenticity, utilizing a maximum number of contact points with relevant stakeholders.

Communication and innovation management

A number of questions dealing with promoting new ideas, products and technologies and the underlying concepts of innovation shows that the prospects of innovation communication are widely neglected. Only every fifth communication manager in Europe has adopted the topic „innovation“ – which is from utmost importance for CEOs and top management – as a strategic issue for himself. Two third of the PR professionals are not regularly involved into the innovation process within their company. So it is quite clear that the prevailing concept of innovation communication is rather traditional, focussing on the „end of the pipe“ and making external announcements.

Nevertheless, progressive PR professionals support a new understanding of “open innovation”, a concept preached by global companies and management consultancies these days. Significant differences are evident with regard to respondents that are already strongly involved in the innovation process and/or who have recognized the strategic relevance of innovation management. It becomes clear that communication management is requested to support the innovation process from start to finish and to organize an open flow of ideas.

Public relations evaluation is most important, but still deficient in Europe

Linking business strategy and communication is identified as most important issue for public relations by every second PR professional in Europe. But only 20% measure the influence of communication on stock performance; 33% are interested in their contribution to market share. On a more general level, evaluation is still focused on measuring the output in the mass media, using content analysis and counting the total number of clips. PR professionals are also hooked on evaluating corporate reputation, though this overall indicator can hardly be used to set goals and optimize communication management.

Public relations measurement in the USA and Europe (sample chart)

	USA	Europe
Influence on corporate reputation	5,00	4,86
Content analysis of clips	4,49	5,03
Influence on stakeholder / employee attitudes	4,36	4,26
Crisis avoidance/mitigation	3,92	4,42
Total number of clips	3,87	4,75
Praise from internal colleagues	3,71	4,16
Increased PR budget	2,97	4,05
Influence on stock performance	2,62	3,14
Contribution to market share	2,39	3,95

To what extent do you (really) use various measures to evaluate the effectiveness of public relations / communication management? (relevance: 1 = do not use at all ↔ 7 use significantly)

Europe: www.communicationmonitor.eu / Zerfaß et al. 2007 / n = 1,087 PR Professionals; adapted scale.

USA: GAP III Study 2005 – Public Relations General Accepted Practices, USC Annenberg Strategic Public Relations Center / Council of Public Relations Firms. Average results; selected items only. n = 347 companies.

Compared to similar research from the United States this survey reveals that Europe shows different approaches towards communication controlling. For example, practitioners still believe in counting press clippings and celebrating increased budgets.

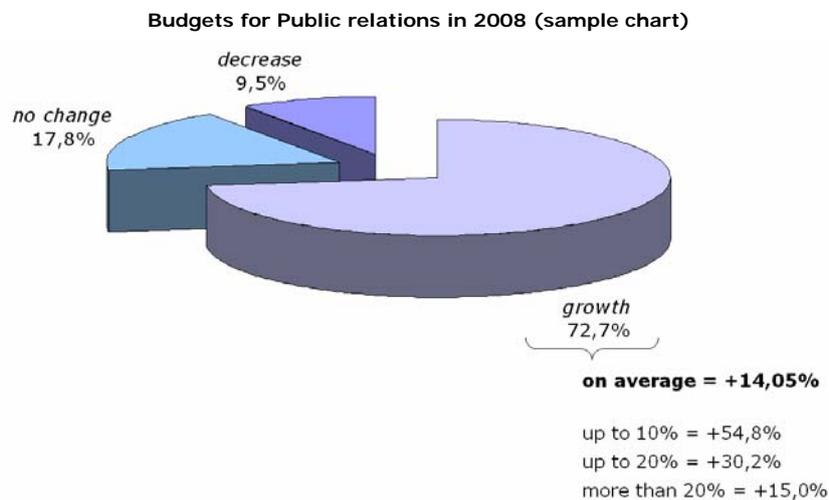
Fragmented audiences pose a major challenge to public relations in Europe

Communication strategies which cope with aspects like specification and addressing stakeholders directly via online channels will be decisive in Europe's changing media landscape. One-voice-strategies and unified messages are hard to realize, as no European sphere is emerging as a forum for public debate. So integrated communication has to be re-conceptualized as a strategic assignment, transcending the instrumental level often discussed today.

Upgrading the infrastructure for consultancy and controlling can be identified as a general trend within the field. The survey results show that saving money by outsourcing hand-on tasks in public relations (writing, printing, programming) is less important than building up potentials for future success. More than 60% of the respondents are interested in expanding their institutional network and establishing routines for managing and evaluation across Europe.

Significant upturn for public relations in Europe – Companies and B2C are going ahead

Seven out of ten communication managers in Europe expect increasing budgets in 2008 with an average plus of 14%. Public relations also creates jobs: every second asked in the survey expects to have more personnel in 2008. A more detailed analysis reveals that PR professionals in communication departments expect a significant stronger growth in financial as well as in personnel resources, compared to consultancies. This means that agencies are less dynamic (or more cautious) as their clients. Moreover, companies and agencies working in the business-to-consumer environment are expecting a 15,3% growth in budgets and a 23,4% growth in personnel in 2008.



www.communicationmonitor.eu / Zerfaß et al. 2007 / n = 1,087 PR Professionals from 22 countries

About the survey

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Sponsor: Hugin Group

Hugin, a NYSE Euronext company, is the leading pan-European provider of innovative services and professional support for connecting communication professionals with their target audiences (PR/IR distribution), www.hugin.com



About Euprera

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

About the University of Leipzig

The University of Leipzig is known as the birthplace of communication science in Europe (Institut fuer Zeitungskunde founded in 1916) and is currently ranked first among the German media study courses (Handelsblatt Karriere Ranking 2006). The department of communication management and public relations has a comprehensive track record of more than 50 academic book publications and numerous studies on a national and international level. More information: www.communicationmanagement.de