

# EUROPEAN COMMUNICATION MONITOR 2010

STATUS QUO AND CHALLENGES FOR PUBLIC RELATIONS IN EUROPE  
RESULTS OF AN EMPIRICAL SURVEY IN 46 COUNTRIES

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Overview

## Key facts

### **European Communication Monitor 2010**

- \_ Most comprehensive analysis of communication management and public relations worldwide; 1,955 participating professionals from 46 countries
- \_ Annual research project conducted since 2007 by a group of professors from 11 renowned universities across Europe, led by Prof. Dr. Ansgar Zerfass, University of Leipzig
- \_ Organised by the European Public Relations Education and Research Association (EUPRERA), the European Association of Communication Directors (EACD) and Communication Director Magazine
- \_ Sponsors: Infopaq, Grayling

### **The research highlights:**

- \_ Challenges for communication professionals in the future
- \_ Strategic issues, development of disciplines and communication instruments
- \_ Indicators of excellence and power, planning procedures, leadership style
- \_ Contribution to organisational objectives
- \_ Perspectives and limitations of social media
- \_ Salaries and job satisfaction

## Academic task force

### Research team

- \_ Ansgar Zerfass, Prof. Dr., University of Leipzig (GE) – Lead Researcher
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- \_ Piet Verhoeven, Ass. Prof. Dr., University of Amsterdam (NL)
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### Advisory board

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### Statistical analysis and organisational support

- \_ Ronny Fechner, M.A., & Katharina Simon, B.Sc., University of Leipzig (GE)

## Partners

### **European Public Relations Education and Research Association (EUPRERA)**

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

### **European Association of Communication Directors (EACD)**

- The European Association of Communication Directors is the leading network for communication professionals across Europe with more than 1,200 members. The non-partisan association lobbies for the profession, establishes common quality standards and promotes the advancement of professional qualification by organising events and providing services and material. [www.eacd-online.eu](http://www.eacd-online.eu)

### **Communication Director**

- Communication Director is a quarterly magazine for Corporate Communications and Public Relations in Europe. It documents opinions on strategic questions in communication, highlights transnational developments and discusses them from a European perspective. The magazine is published by Helios Media, a specialist publishing house based in Berlin and Brussels. [www.communication-director.eu](http://www.communication-director.eu)

## Sponsors

### **Infopaq**

- Infopaq is a global, European-based company, with expertise in media, publicity and analysis. By providing media monitoring, surveys, tracking, news evaluation, analysis and consulting services, they help their clients improve future communications efforts and thereby attain their business goals. The company has approximately 6,500 clients and over 500 employees in Germany, Denmark, Estonia, Finland, Norway and Sweden. [www.infopaq.com](http://www.infopaq.com)

### **Grayling**

- Grayling is the world's second largest independent Public Relations, Public Affairs, Investor Relations and Events consultancy with specialist services including CSR, environment and sustainability and digital. The consultancy has 900 staff in 70 offices in 40 countries across the US, Western and Eastern Europe, Africa and Asia Pacific. [www.grayling.com](http://www.grayling.com)

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- The full report (text and figures) is available as a book published by Helios Media, 124 pp., ISBN 978-3-942263-05-4.

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### Short quotation to be used in legends (charts/graphics)

- Source: European Communication Monitor 2010





Research design and  
socio-demographic analysis

## Outline of the survey

### **Aims and focus**

- \_ to monitor trends in communication management
- \_ to analyse the changing framework for the profession in Europe
- \_ to evaluate specific topics like communication strategy and planning, indicators of excellence and power, contribution to organisational objectives, development of the discipline and communication instruments, strategic issues, critical aspects of social media, leadership styles, salaries and job satisfaction
- \_ to identify the development of communication management in different types of organisations, countries and regions

### **Target group**

- \_ Communication executives and PR professionals working in organisations and consultancies throughout Europe

## Methodology

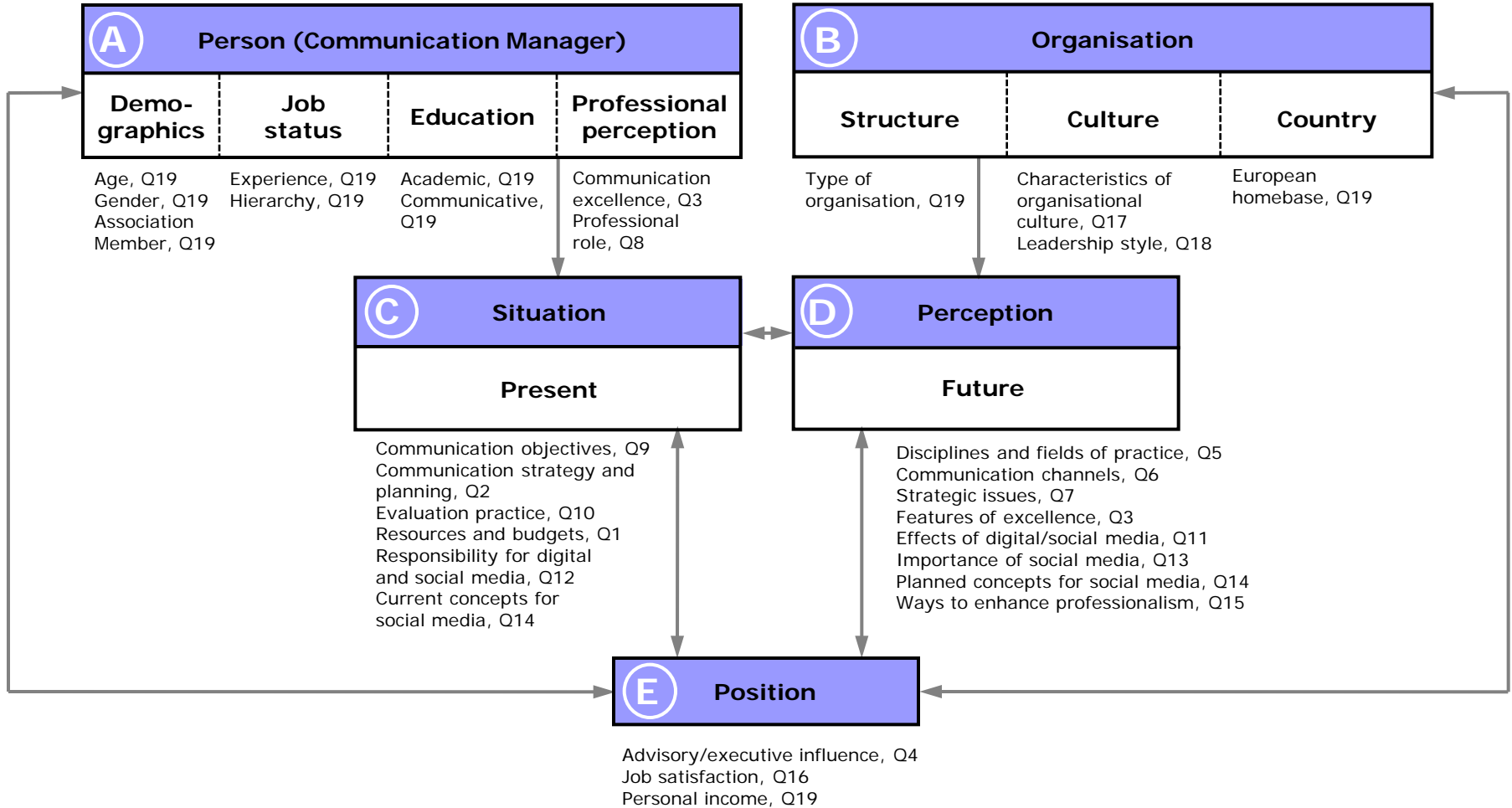
### Survey method and sampling

- \_ online survey in March 2010 (4 weeks), English language
- \_ questionnaire with 19 sections, based on hypotheses and instruments derived from previous research and literature
- \_ pre-test with 53 practitioners in 12 European countries
- \_ personal invitation to 30,000+ professionals throughout Europe via e-mail based on a database provided by EACD; additional invitations to participate via national branch associations and networks (partly self-recruiting); 4,602 respondents and 2,043 fully completed replies
- \_ evaluation is based on 1,955 fully completed replies by participants clearly identified as part of the population (communication professionals in Europe)

### Statistical analysis

- \_ methods of empirical research, descriptive and analytical analysis (using SPSS)
- \_ results have been statistically agreed by Pearson's chi-square tests ( $\chi^2$ ) or Spearman's rank correlation tests ( $\rho$ ) and are classified as significant ( $p \leq 0.05$ ) where appropriate
- \_ in this report, data highlighted in green or red depicts significant correlations

## Research framework and questions



## Demographic background of participants (1,955 communication professionals from 46 European countries)

Position	
Head of communication, Agency CEO	47.9%
Responsible for single communication discipline, Unit Leader	31.3%
Team member, Consultant	16.5%
Other	4.4%

Organisation	
Communication department	78.4%
- joint stock company	28.5%
- private company	21.5%
- government-owned, public sector, political organisation	16.9%
- non-profit organisation, association	11.6%
Communication consultancy, PR Agency, Freelance Consultant	21.6%

Job experience	
Up to 5 years	19.2%
6 to 10 years	28.6%
More than 10 years	52.1%

Gender / Age	
Female	55.8%
Male	44.2%
Age (on average)	40.6 yrs

## Geographical distribution and affiliation

<b>Respondents</b>	<b>2010</b>	2009 survey
_ Professionals working in communication management	1,955	(1,863)
<b>Geographical distribution</b>		
_ Total number of European states	46	(34)
_ Northern Europe (e.g. Norway, United Kingdom, Latvia)	28.8%	(31.1%)
_ Western Europe (e.g. Germany, Netherlands, France)	34.7%	(41.1%)
_ Southern Europe (e.g. Italy, Slovenia, Croatia)	25.2%	(19.0%)
_ Eastern Europe (e.g. Poland, Czech Republic, Bulgaria)	11.3%	(8.5%)
<b>Membership in a professional organisation</b>		
_ EACD	11.4%	(12.7%)
_ Other international communication association	14.0%	(16.2%)
_ National PR or communication association	50.3%	(55.4%)

## Personal background of respondents

<b>Communication qualifications</b>	<b>2010</b>	2009 survey
_ Academic degree in communication (Bachelor, Master, Doctorate)	42.0%	(41.4%)
_ Professional certificate in public relations / communication management	23.8%	(26.4%)
_ Professional certificate in other communication discipline	17.9%	(17.3%)
 <b>Highest academic educational qualification</b>		
_ Doctorate (Ph.D., Dr.)	7.3%	(7.4%)
_ Master (M.A., M.Sc., Mag., M.B.A.), Diploma	59.3%	(60.2%)
_ Bachelor (B.A., B.Sc.)	26.9%	(25.1%)
_ No academic degree	6.5%	(7.4%)

## Organisational cultures: Different types within the sample

	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations
<b>Integrated culture</b> (participative – proactive)	55.8%	54.5%	51.4%	59.3%
<b>Interactive culture</b> (participative – reactive)	18.9%	20.0%	22.8%	21.7%
<b>Entrepreneurial culture</b> (non-participative – proactive)	5.2%	8.6%	4.9%	3.5%
<b>Systematised culture</b> (non-participative – reactive)	20.1%	16.9%	21.0%	15.5%



## Countries and regions represented in the study

### Respondents are based in 46 European countries and four regions

Northern Europe 28.8% (n=563)	Western Europe 34.7% (n=678)	Eastern Europe 11.3% (n=221)	Southern Europe 25.2% (n=493)
Denmark Estonia Finland Iceland Ireland Latvia Lithuania Norway Sweden United Kingdom	Austria Belgium France Germany Liechtenstein Luxembourg Netherlands Switzerland	Armenia** Belarus Bulgaria Czech Republic Hungary Moldova Poland Romania Russia Slovakia Ukraine	Albania Andorra Bosnia and Herzegovina Croatia Cyprus** Greece Italy Kosovo* Macedonia Malta Montenegro Portugal San Marino Serbia Slovenia Spain Turkey**

In this survey, the universe of 50 European countries is based on the official list of European Countries by the European Union ([http://europa.eu/abc/european\\_countries](http://europa.eu/abc/european_countries)). Countries are assigned to regions according to the official classification of the United Nations Statistics Division (2010). Countries marked \* are not included in the UN classification; countries marked \*\* are assigned to Western Asia. These countries were collated like adjacent nations. No respondents were registered from Azerbaijan, Georgia, Monaco and Vatican City.

## Interpretation

### **Insights into the structures and evolution of communications in Europe**

- \_ Based on a sample of 1,955 professionals from 46 European countries, this research is probably the most comprehensive transnational study ever conducted in the field of public relations and communication management.
- \_ Respondents are characterised by a high level of experience: almost 80% are head of communications, unit leaders or agency CEOs, 50% have more than 10 years of professional experience, the average age is 41 years. The survey lays a solid ground for identifying basic structures and developments in strategic communication.
- \_ It is necessary to note that economies, communication landscapes and PR professions are in rather different stages of development throughout Europe. Moreover, there is no knowledge about the population of communication departments and agencies in Europe. The survey has been conducted in the English language. Consequently, the findings presented here can not claim representativeness. They are especially useful to identify relevant patterns and trends in the field, which may stimulate qualitative discussions.
- \_ The analysis is based on thorough empirical research and analysis. Replies from participants not currently working in communication management (academics, students) and from non-European countries have been removed. Only fully completed questionnaires have been taken into account. Data have been analysed using the appropriate statistical procedures like chi-square tests and rank correlation tests.



Job satisfaction

## Job satisfaction: Most PR practitioners in Europe are content



**69.2%**

are satisfied with their actual job situation



**21.1%**

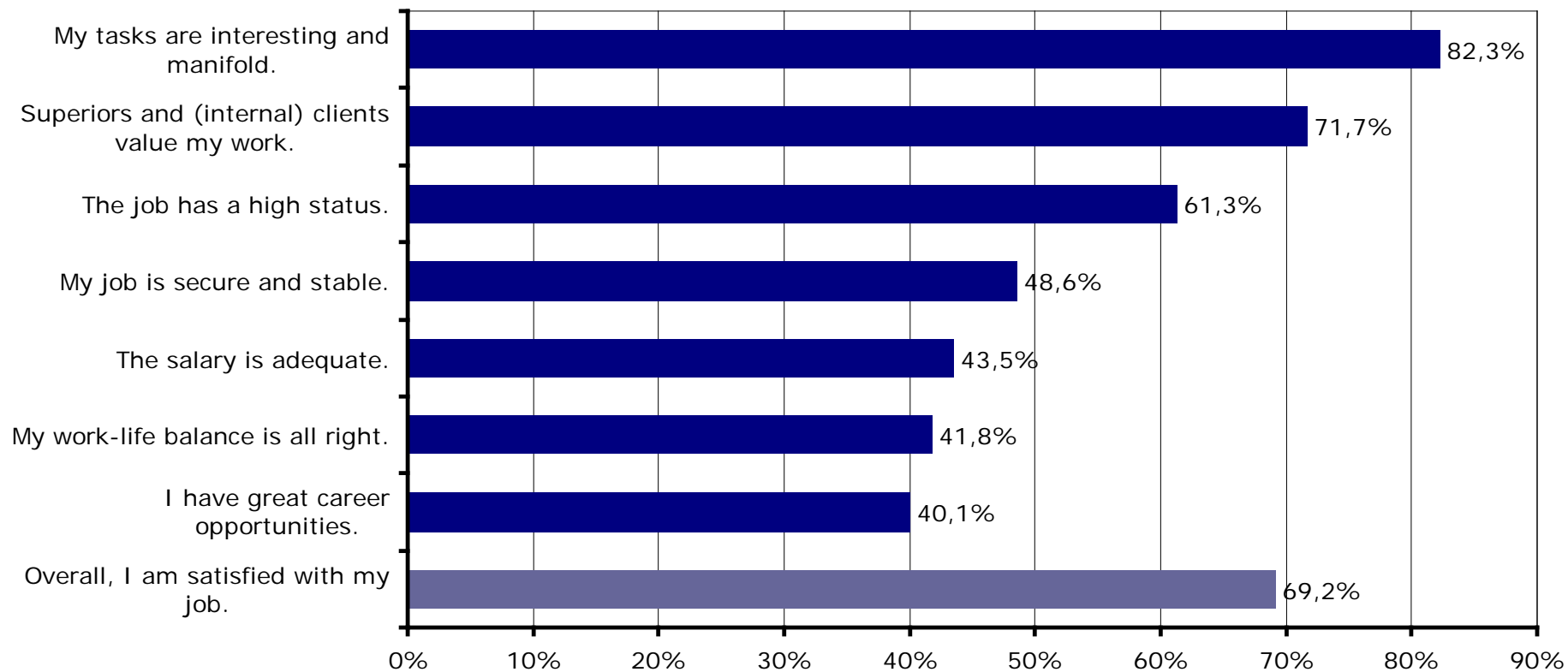
gave a neutral answer



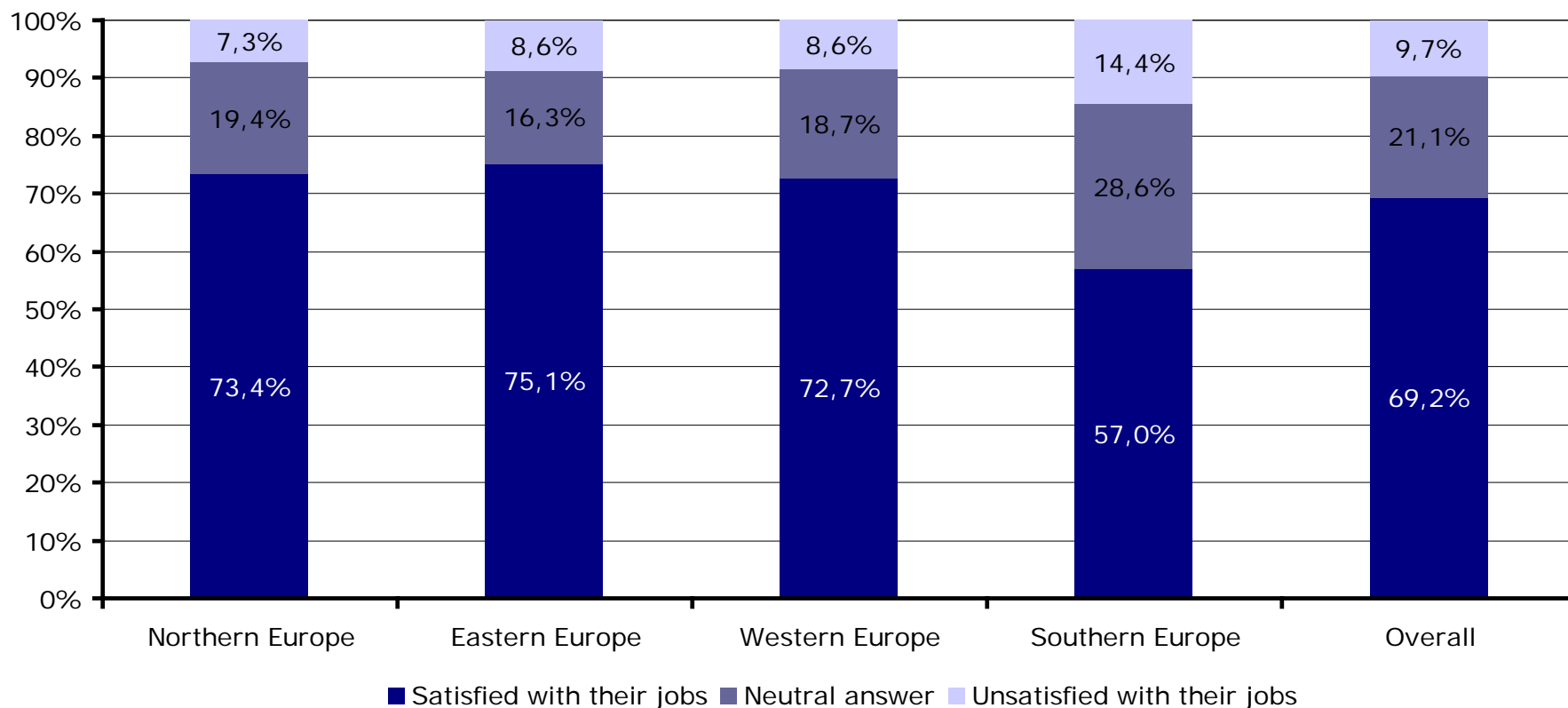
**9.7%**

are unhappy with their job

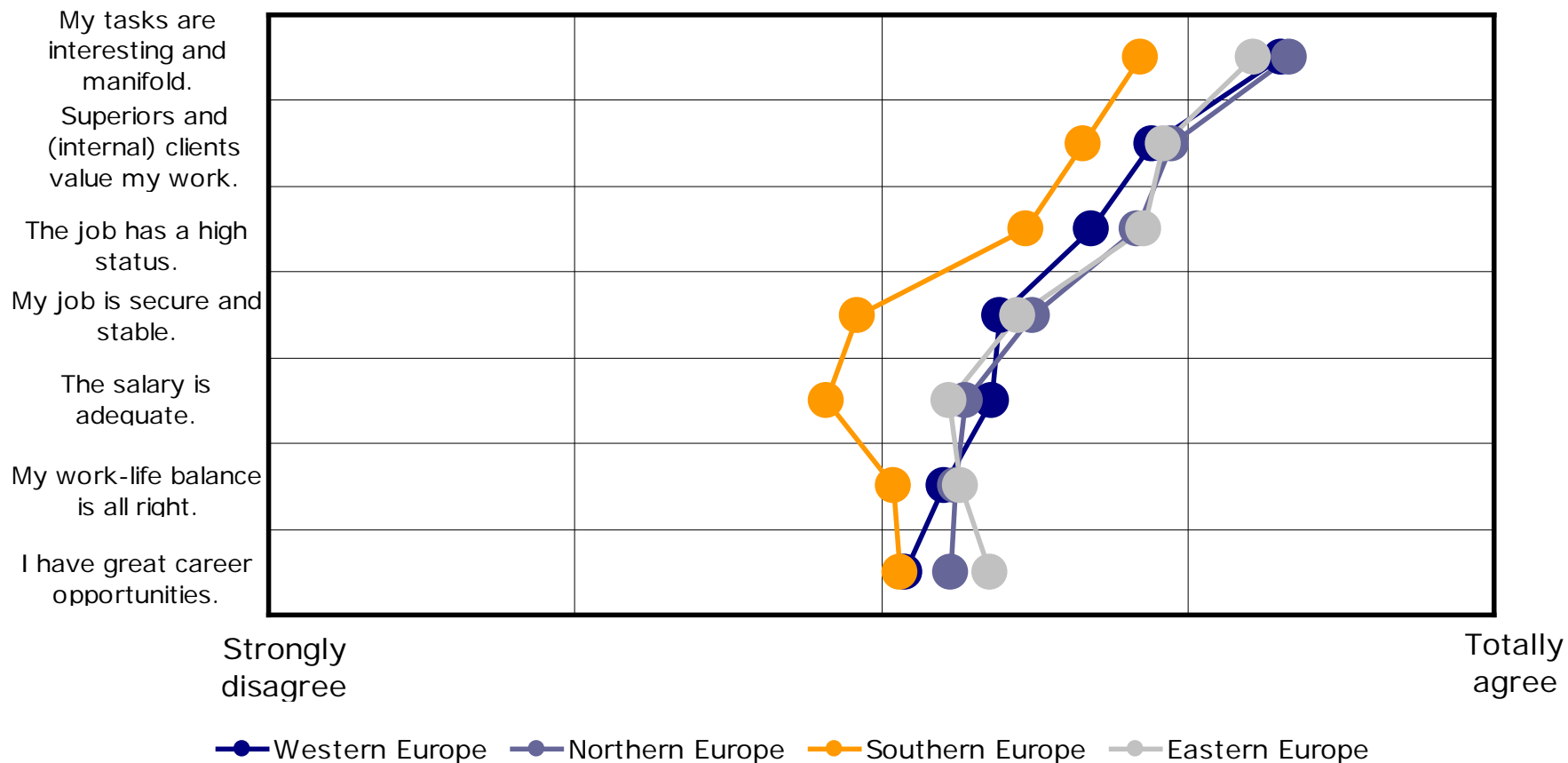
## Communication professionals enjoy interesting work, but job security and career opportunities are limited



## Practitioners in Eastern Europe are the most satisfied with their jobs



## Respondents in Southern Europe are less content, especially with regards to job security and income



PR professionals are significantly more likely to be satisfied if they are female and working in higher positions

Type of organisation	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations	Agencies
Overall satisfaction	3.87	3.77	3.76	3.78	3.80

Position	Head of communication, Agency CEO	Unit Leader	Team member, Consultant
Overall satisfaction	4.01	3.63	3.52

Gender	Female	Male	Total
Overall satisfaction	3.89	3.73	3.80

Association membership	EACD	Other professionals	Total
Overall satisfaction	3.91	3.79	3.80



## Job satisfaction correlates with the level of income and development of resources

A higher salary implies a significantly stronger satisfaction with the job situation.

Respondents are significantly more satisfied, if resources for communications developed better (compared to other functions) within the organisation.

*Nonparametric correlations (Spearman's rho)*

	Job satisfaction	Annual salary
Job satisfaction	1.000	0.211
Annual salary	0.211	1.000

*Nonparametric correlations (Spearman's rho)*

	Job satisfaction	Worse resources
Job satisfaction	1.000	-0.216
Worse resources	-0.216	1.000

## Interpretation

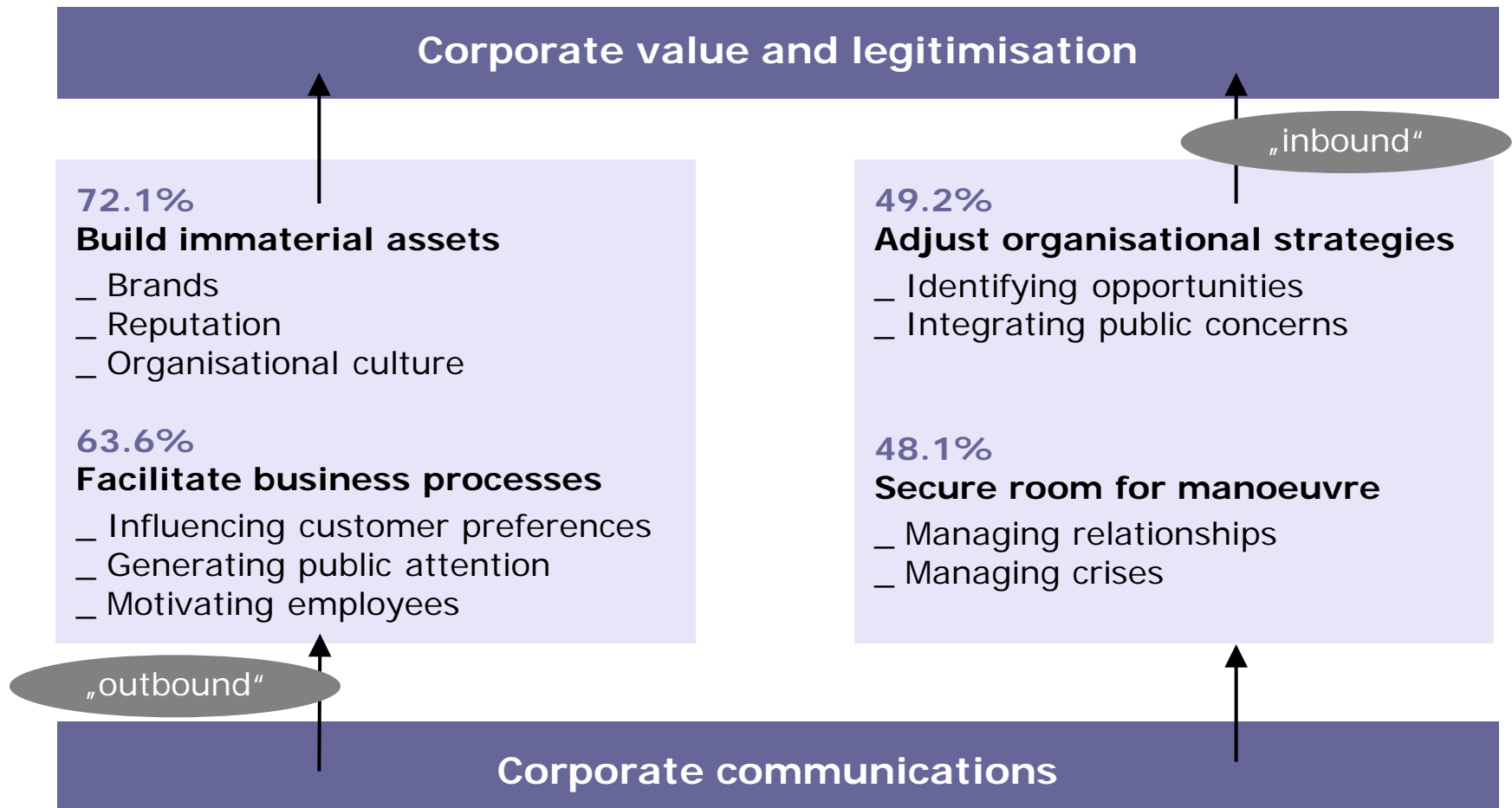
### Job satisfaction

- \_ In general, communication professionals in Europe are satisfied with their job, although there are differences across the regions.
- \_ Practitioners in Eastern Europe are most satisfied with their working conditions, Southern Europeans the least. Respondents in the latter region are lagging behind in all dimensions; they complain about inadequate salaries and less job security. Cultural and socio-economic differences and a diverging maturity of the profession across Europe may explain these differences.
- \_ Interesting tasks, acknowledgement of the work by superiors and clients and the status of the job are the main contributors to satisfaction.
- \_ Only four out of ten respondents are satisfied with their career opportunities, work-life balance and salary.
- \_ PR professionals are more likely to be satisfied if they are female and working in higher positions. These results point to factors like gender and managerial responsibility as important for the job satisfaction of professionals.
- \_ Moreover, job satisfaction is positively influenced by higher salaries and a better development of resources during the recession. While self-actualisation by performing manifold tasks and respect by others are prevalent in the profession, material incentives are significant drivers of satisfaction.

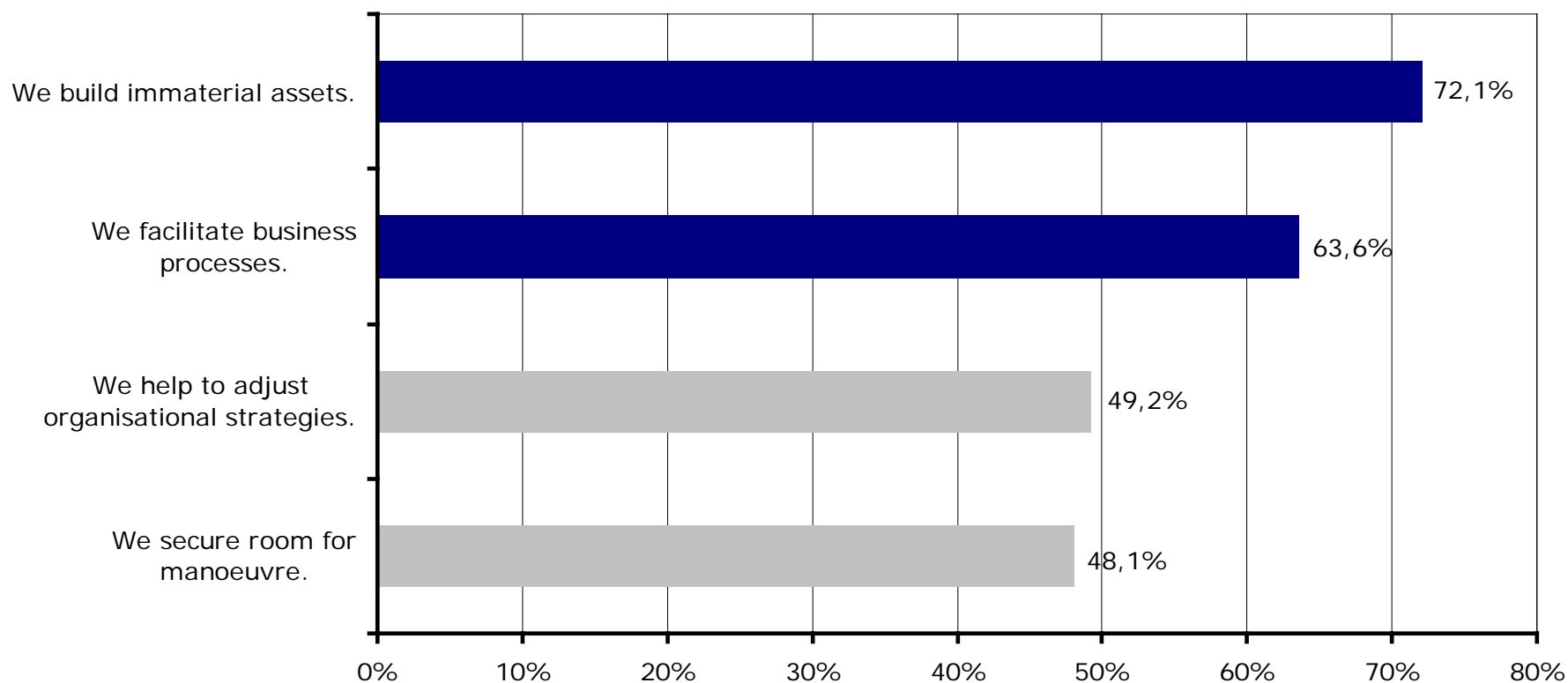


Contribution to organisational objectives and roles

## How communication professionals and departments in Europe help to achieve the overall goals of their organisations



Hard to measure goals are weighted more strongly than supporting the bottom line; shaping images dominates influencing strategies



## Contribution to organisational objectives in European regions

	Northern Europe	Western Europe	Southern Europe	Eastern Europe
Build immaterial assets	3.94	3.86	3.91	4.07
Facilitate business processes	3.75	3.62	3.66	3.85
Help to adjust organisational strategies	3.42	3.30	3.44	3.39
Secure room for manoeuvre	3.53	3.20	3.30	3.48

## Contribution to organisational objectives in different organisations

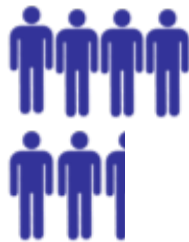
	Joint stock	Private	Governmental	Non-profit	Agencies
Build immaterial assets	74.3%	76.0%	65.2%	69.9%	71.8%
Facilitate business processes	64.8%	63.8%	62.1%	61.1%	64.2%
Help to adjust organisational strategies	45.8%	42.4%	50.9%	54.4%	56.4%
Secure room for manoeuvre	53.0%	45.0%	47.6%	39.8%	49.5%

While most communication practitioners strive to support business goals, only 6 out of 10 try to define them



## 85.4%

focus on supporting business goals by  
planning and executing communication  
(+0.6% compared to 2009)



## 62.5%

feel responsible for helping to define  
business strategies  
(+ 1.8% compared to 2009)



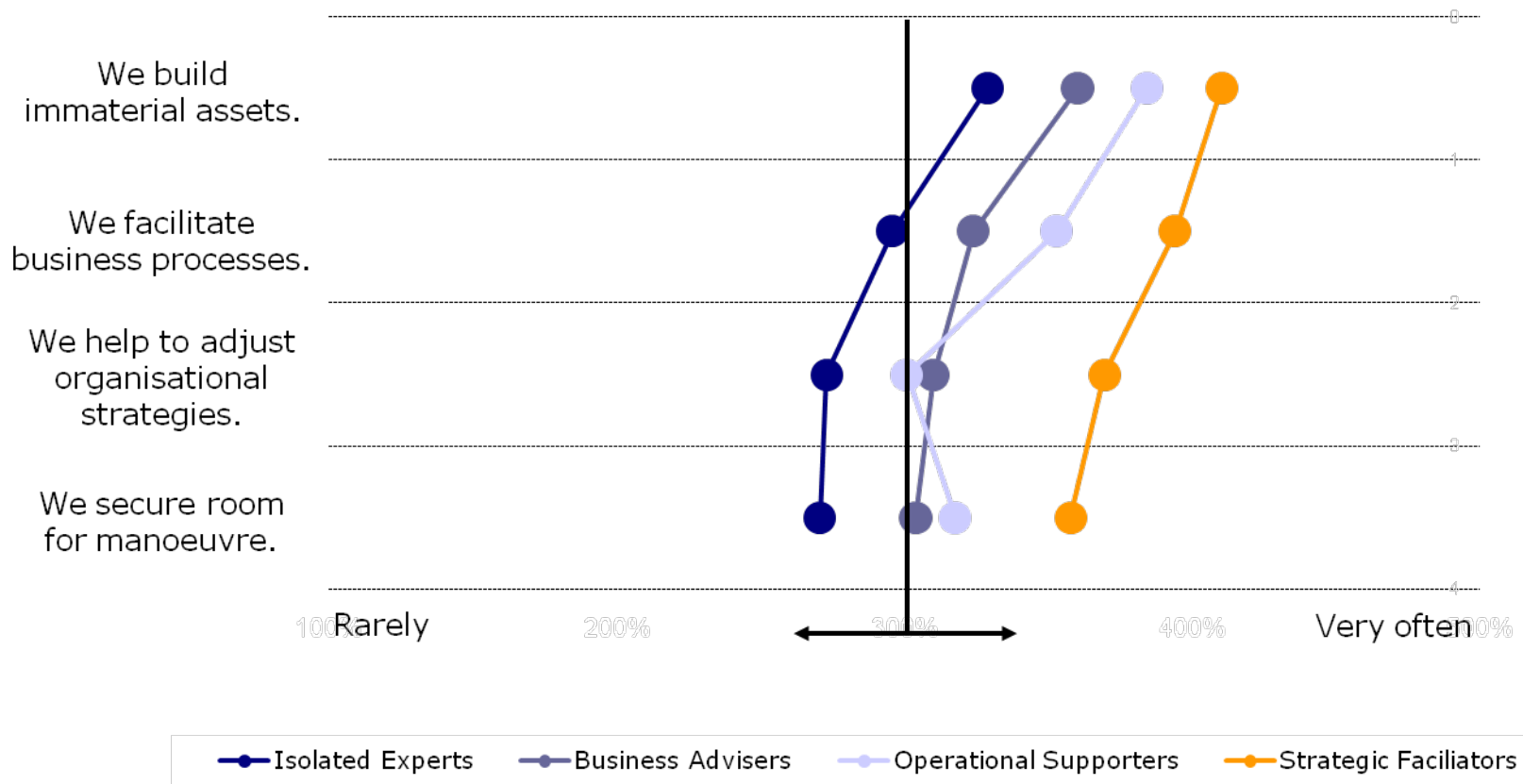
Professional roles: Almost 60% contribute to overall goals by acting as strategic facilitators, while others have limited visions



## Distribution of professional roles in European regions

	Northern Europe	Western Europe	Southern Europe	Eastern Europe
Strategic Facilitators	62.0%	55.5%	57.4%	60.2%
Operational Supporters	27.2%	31.1%	22.3%	24.4%
Business Advisers	2.0%	3.2%	7.7%	4.1%
Isolated Experts	8.9%	10.2%	12.6%	11.3%

## Strategic facilitators express a stronger link to organisational objectives in any dimension



## Interpretation

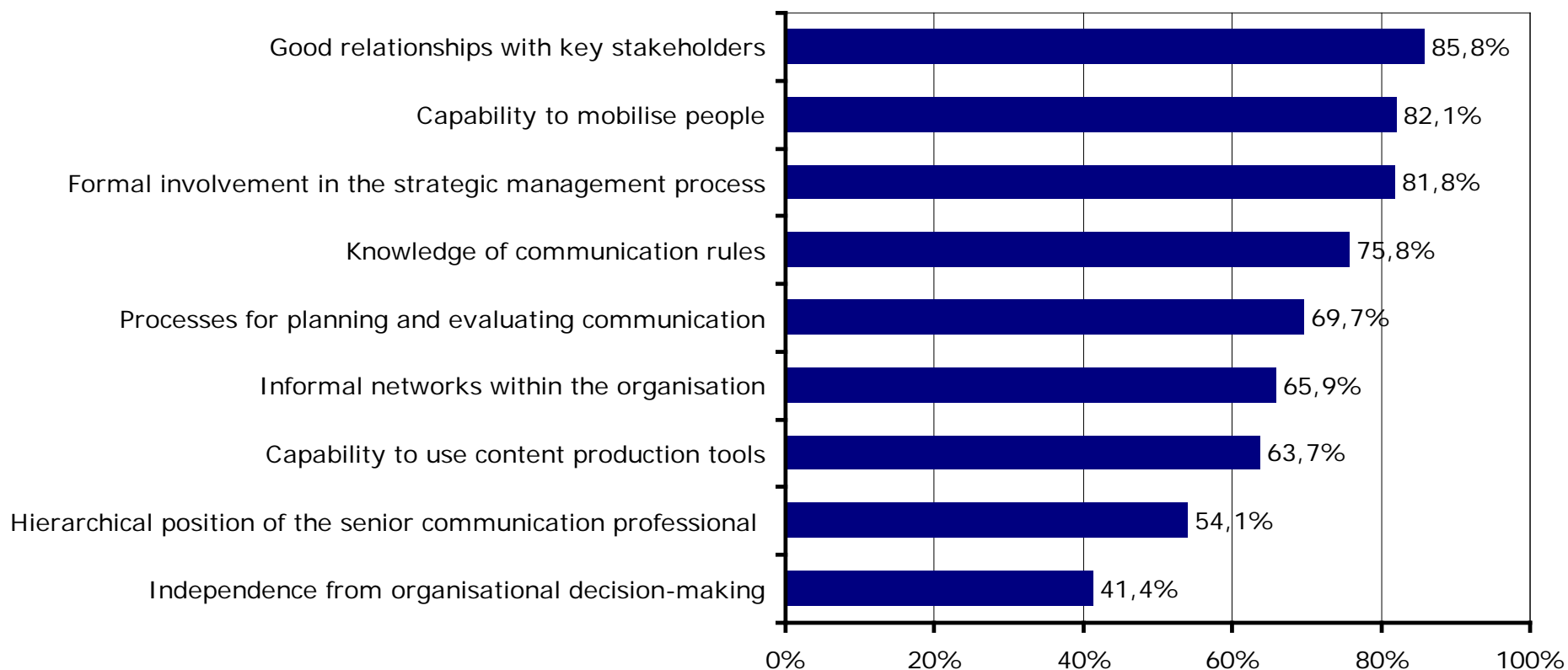
### Missing link between communication activities and organisational goals

- \_ Many professionals neglect one or more basic courses of action by which communication management may contribute to overall organisational goals. While 72% claim building immaterial assets like reputation, culture and brands, only 64% commit themselves to facilitating business processes – the only direct way for communications to support the bottom line.
- \_ Overall, those “outbound” courses aimed at dissemination of messages are predominant. Less than half of the respondents implement “inbound” activities aiming at adjusting organisational strategies or securing room for manoeuvre.
- \_ This corresponds with the professional perception. 85% of the respondents focus on supporting problems deriving from business strategies using communication activities. Less than 63% feel responsible for helping to define organisational objectives by adding the communicative dimension to strategy formulation. Practice thus does not reflect theories (Van Ruler & Verčič 2005; Lurati & Eppler 2006; Zerfass 2008) which define PR professionals as boundary-spanners combining speaking out and listening.
- \_ The “strategic facilitator” role already identified in the ECM 2009 survey (Zerfass et al., 2009) shows a stronger link to organisational objectives than any other professional role. This role is significantly more common in Northern Europe (62% compared to 55% in Western Europe), while nearly 13% of professionals working in Southern Europe identify themselves as “isolated experts”.



Excellence, influence and  
enhancing professionalism

## Communication departments which are perceived as excellent are able to involve stakeholders, mobilise people and influence management processes



## Perceived indicators of excellence in European regions

	Northern Europe	Western Europe	Southern Europe	Eastern Europe
Good relationships with key stakeholders	87,7%	84,4%	84,6%	88,2%
Capability to mobilise people	83,3%	82,0%	80,1%	83,7%
Formal involvement in the strategic management process	82,9%	87,3%	75,7%	75,6%
Knowledge of communication rules (influencing, persuading)	71,9%	75,8%	78,7%	78,7%
Processes for planning and evaluating communication	71,6%	63,4%	74,4%	73,8%
Informal networks within the organisation	71,6%	70,4%	53,8%	64,7%
Capability to use content production tools	65,2%	58,7%	69,0%	63,3%
Hierarchical position of senior communication professional	53,1%	55,6%	53,1%	53,8%
Independence from organisational decision-making	37,8%	41,3%	43,4%	46,2%

## Perceived indicators of excellence and hierarchical positions

	Head of Communication, Agency CEO	Unit Leader	Team member, Consultant
Good relationships with key stakeholders	4.28	4.30	4.32
Capability to mobilise people	4.01	3.90	4.16
Formal involvement in the strategic management process	4.27	4.17	3.98
Knowledge of communication rules (influencing, persuading)	4.04	3.95	3.99
Processes for planning and evaluating communication	3.87	3.87	3.91
Informal networks within the organisation	3.83	3.75	3.76
Capability to use content production tools	4.20	4.16	4.14
Hierarchical position of senior communication professional	3.59	3.36	3.28
Independence from organisational decision-making	3.23	3.31	3.32



## Perceived indicators of excellence and professional experience

	Less than 5 years	6 to 10 years	More than 10 years
Good relationships with key stakeholders	4.25	4.29	4.30
Capability to mobilise people	4.16	4.16	4.19
Formal involvement in the strategic management process	3.97	4.18	4.27
Knowledge of communication rules (influencing, persuading)	3.90	3.99	4.04
Processes for planning and evaluating communication	3.91	3.86	3.89
Informal networks within the organisation	3.72	3.80	3.82
Capability to use content production tools	3.91	3.74	3.69
Hierarchical position of senior communication professional	3.15	3.33	3.62
Independence from organisational decision-making	3.30	3.28	3.26

## Perceived indicators of excellence and academic qualification

	<b>No academic degree or Bachelor</b>	<b>Master or Doctorate</b>
Good relationships with key stakeholders	4.31	4.28
Capability to mobilise people	4.19	4.17
Formal involvement in the strategic management process	4.15	4.21
Knowledge of communication rules (influencing, persuading)	3.98	4.01
Processes for planning and evaluating communication	3.90	3.87
Informal networks within the organisation	3.81	3.79
Capability to use content production tools	3.81	3.72
Hierarchical position of senior communication professional	3.40	3.47
Independence from organisational decision-making	3.30	3.26

## Acceptance of communication professionals in European organisations has grown slightly from 2009 to 2010

# 75.5%

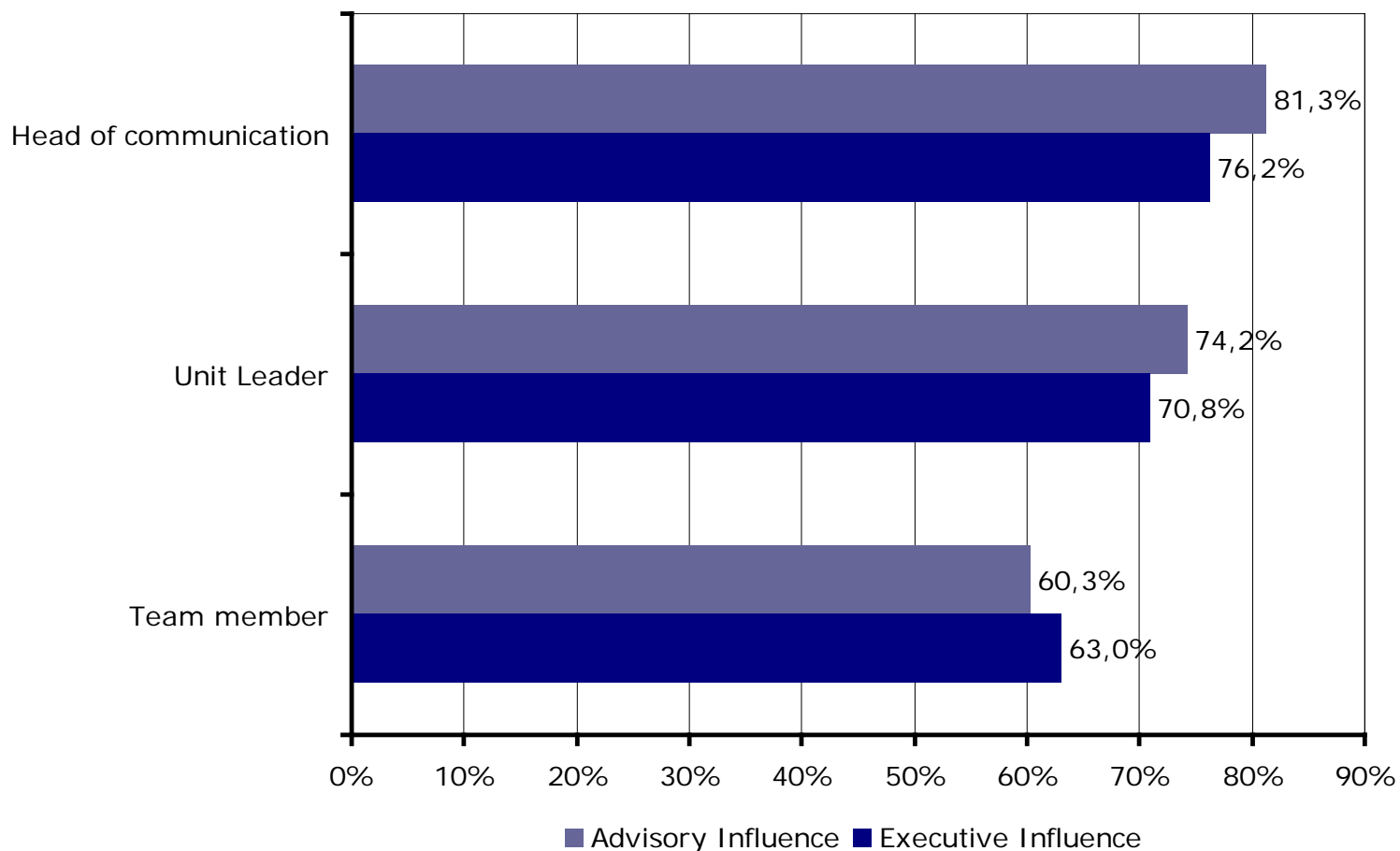
are taken seriously by senior management  
(advisory influence)

+2.5% compared to 2009

# 72.1%

are likely to be invited to senior-level meetings  
dealing with organisational strategic planning  
(executive influence)

## Perceptions of influence correlate with the hierarchical position



## Enhancing professionalism: Practitioners focus on skills and networking; few are willing to invest in research until 2012



## Enhancing professionalism in different types of organisations

	Joint stock	Private	Governmental	Non-profit	Overall
Training communication skills of team members	4.03	4.09	4.08	4.10	4.07
Networking with other professionals/organisations	3.98	4.00	3.99	4.09	3.99
Training management know-how of team members	3.83	3.83	3.76	3.73	3.84
Developing high potential individuals	3.93	3.78	3.58	3.69	3.83
Developing new task sets, processes, and business models for department/agency	3.68	3.67	3.51	3.55	3.66
Benchmarking	3.66	3.67	3.65	3.69	3.63
Building relationships with future professionals	3.53	3.59	3.38	3.46	3.55
Supporting education of future professionals at universities	3.20	3.23	3.20	3.20	3.25
Investing in own research projects	3.17	3.20	2.95	3.22	3.20
Supporting academic research	2.77	2.85	2.81	2.86	2.82

## Enhancing professionalism in European regions

	Northern Europe	Western Europe	Southern Europe	Eastern Europe	Overall
Training communication skills of team members	4.09	3.96	4.15	4.18	4.07
Networking with other professionals/organisations	4.02	3.91	4.05	4.03	3.99
Training management know-how of team members	3.74	3.72	4.03	4.01	3.84
Developing high potential individuals	3.78	3.68	3.99	4.07	3.83
Developing new task sets, processes, and business models for department/agency	3.60	3.57	3.80	3.80	3.66
Benchmarking	3.59	3.46	3.85	3.75	3.63
Building relationships with future professionals	3.37	3.44	3.83	3.69	3.55
Supporting education of future professionals at universities	2.93	3.13	3.68	3.51	3.25
Investing in own research projects	2.95	3.06	3.58	3.42	3.20
Supporting academic research	2.61	2.69	3.19	2.90	2.82

## Interpretation

### **Perceptions of excellence and influence depend on experience and position**

- \_ From the point of view of European PR professionals, the top criteria for excellence in communication departments are the ability to develop and maintain good relationships with stakeholders; the capacity to mobilise people and to be formally involved in management decisions.
- \_ When defining excellence, the more senior the practitioners are and the more experience they have (in years) significantly influences the importance placed on the hierarchical position of the head of communications. Less experienced practitioners seem to underestimate the relevance of formal structures and power.
- \_ All over Europe, PR professionals are trusted advisers, with 75.5% reporting that their recommendations are taken seriously by senior management. This is a small 2.5% increase within the last 12 months. 72.1% claim executive influence for their function. They report it is likely for communication to be invited to senior-level meetings dealing with organisational strategic planning.
- \_ Regarding the development of the communication function in the next three years the focus is on training communication and business skills as well as networking and supporting high-profile individuals within the team.
- \_ When looking at enhancing professionalism the respondents are not willing to invest significantly. They view communication mainly as a personal skill and not so much as organisational competence. Across the sectors and the regions very few are willing to support new knowledge development through academic research.



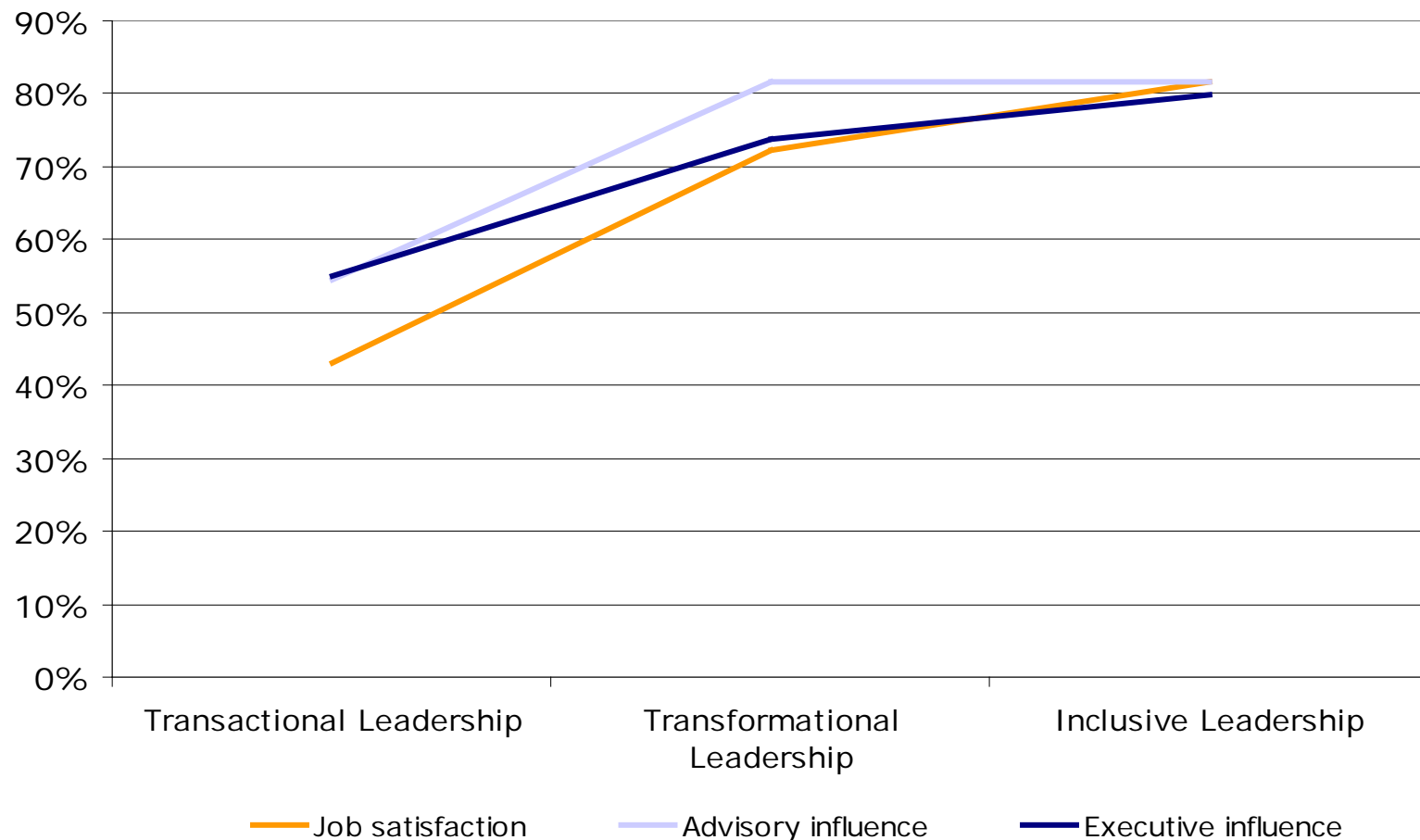


Leadership style

## Leadership style: Communication managers utilise different approaches to achieve goals

	Joint stock companies	Private companies	Governmental organisations	Non-profit organisations
<b>Transactional</b> Leaders draw on their authority and remind followers of common standards	20.3%	19.8%	29.5%	25.2%
<b>Transformational</b> Leaders define a vision and appeal to followers' ideals and values	34.4%	38.1%	28.6%	27.9%
<b>Inclusive</b> Leaders name challenges and involve followers in shared decision making	45.3%	42.1%	41.9%	46.9%

## Leadership style correlates with job satisfaction and influence: Inclusive leaders outperform the others in both dimensions



## Leadership style does not correlate with perceived indicators of excellence

	<b>Transactional leadership</b>	<b>Transformational leadership</b>	<b>Inclusive leadership</b>	<b>Total</b>
Good relationships with key stakeholders	4.24	4.29	4.33	4.30
Capability to mobilise people	4.16	4.12	4.25	4.19
Formal involvement in the strategic management process	4.21	4.09	4.28	4.20
Knowledge of communication rules (influencing, persuading)	4.00	3.95	4.01	3.99
Processes for planning and evaluating communication	3.84	3.84	3.90	3.87
Informal networks within the organisation	3.75	3.85	3.92	3.86
Capability to use content production tools	3.75	3.75	3.79	3.77
Hierarchical position of senior communication professional	3.45	3.52	3.44	3.47
Independence from organisational decision-making	3.31	3.31	3.25	3.28

## Organisational culture and leadership style in communication departments are interdependent

	Transactional leadership	Transformational leadership	Inclusive leadership
<b>Integrated culture</b> (participative – proactive)	31,7%	58,7%	64,3%
<b>Interactive culture</b> (participative – reactive)	20,9%	19,9%	20,7%
<b>Entrepreneurial culture</b> (non-participative – proactive)	7,7%	5,7%	4,9%
<b>Systematised culture</b> (non-participative – reactive)	39,7%	15,7%	10,1%

## Interpretation

### Leadership style in communication management

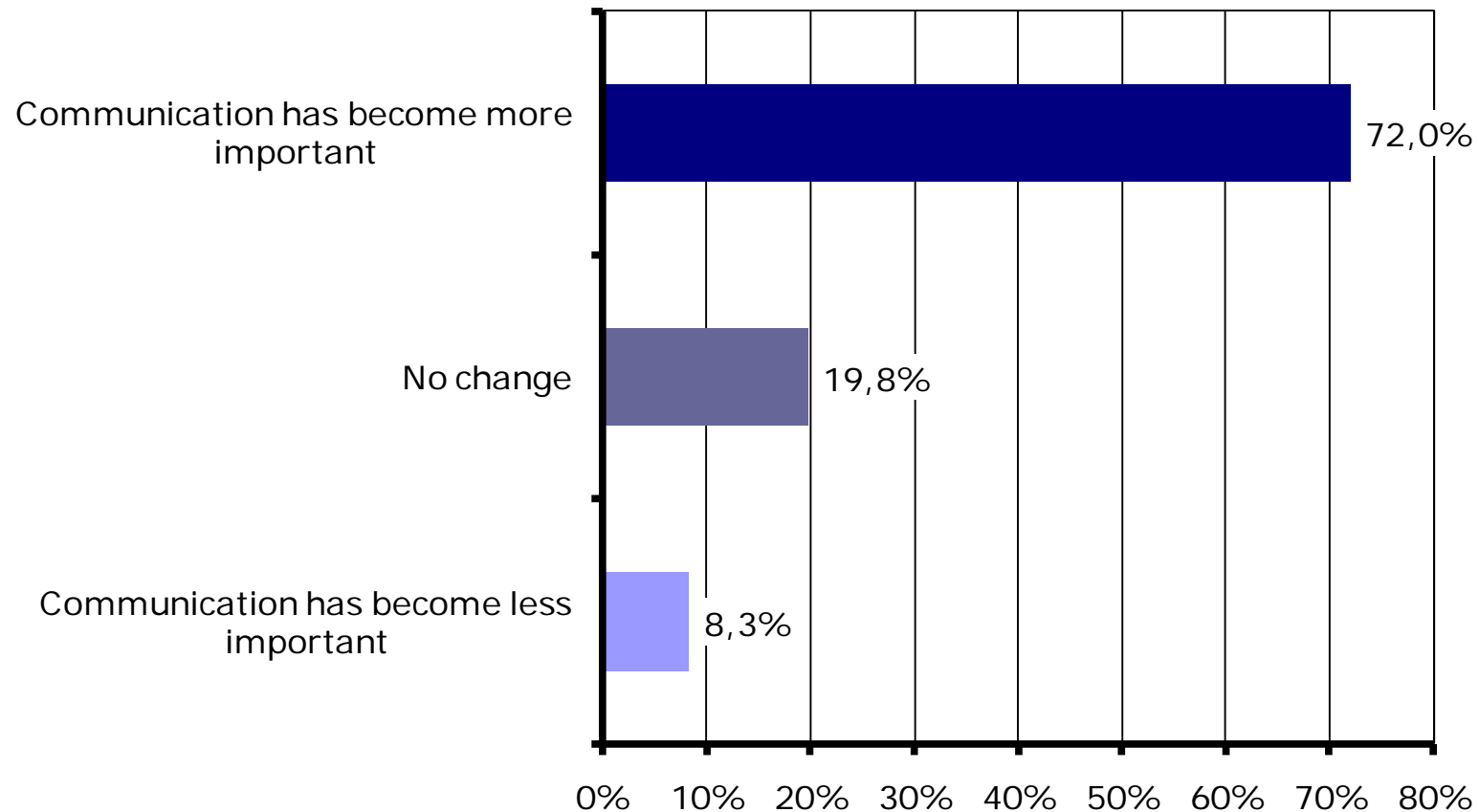
- \_ The survey supports previous research (Werder & Holtzhausen 2009) that communication professionals enact different leadership styles. They may draw on their authority (transactional), appeal to ideals and visions (transformational) or name challenges and stimulate shared decision making (inclusive style).
- \_ Both organisational structures and cultures have a significant impact on the dominant leadership style. Inclusive leadership proliferates in an integrated culture. Governmental and political organisations present the least adequate framework to enable this leadership style.
- \_ Quite surprisingly, leadership style does not influence the way professionals define the excellence of communication departments. Those who rely on hierarchical structures to guide followers do not value the hierarchical position of the senior communication officer as significantly more important than their fellows.
- \_ Inclusive leadership is positively correlated with job satisfaction. Professionals who involve their followers in shared decision are more contented. Reciprocally, this satisfaction provides the framework for inclusive practices.
- \_ Inclusive leadership also correlates with executive power. This approach to leadership in public relations may be considered a guide to the profession.





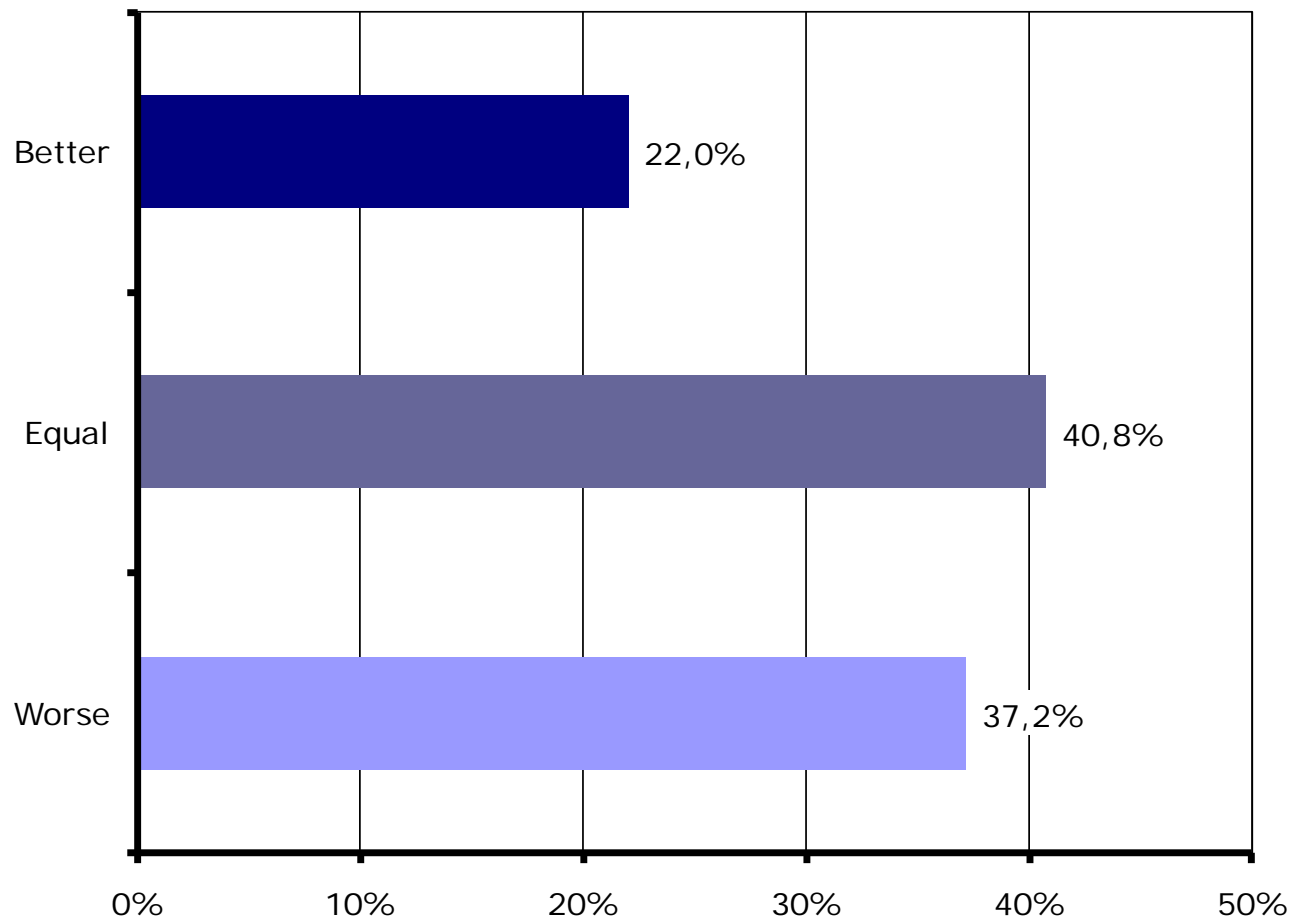
Effects of the global downturn

A clear majority of PR professionals in Europe believe that their function has become more important since the recession

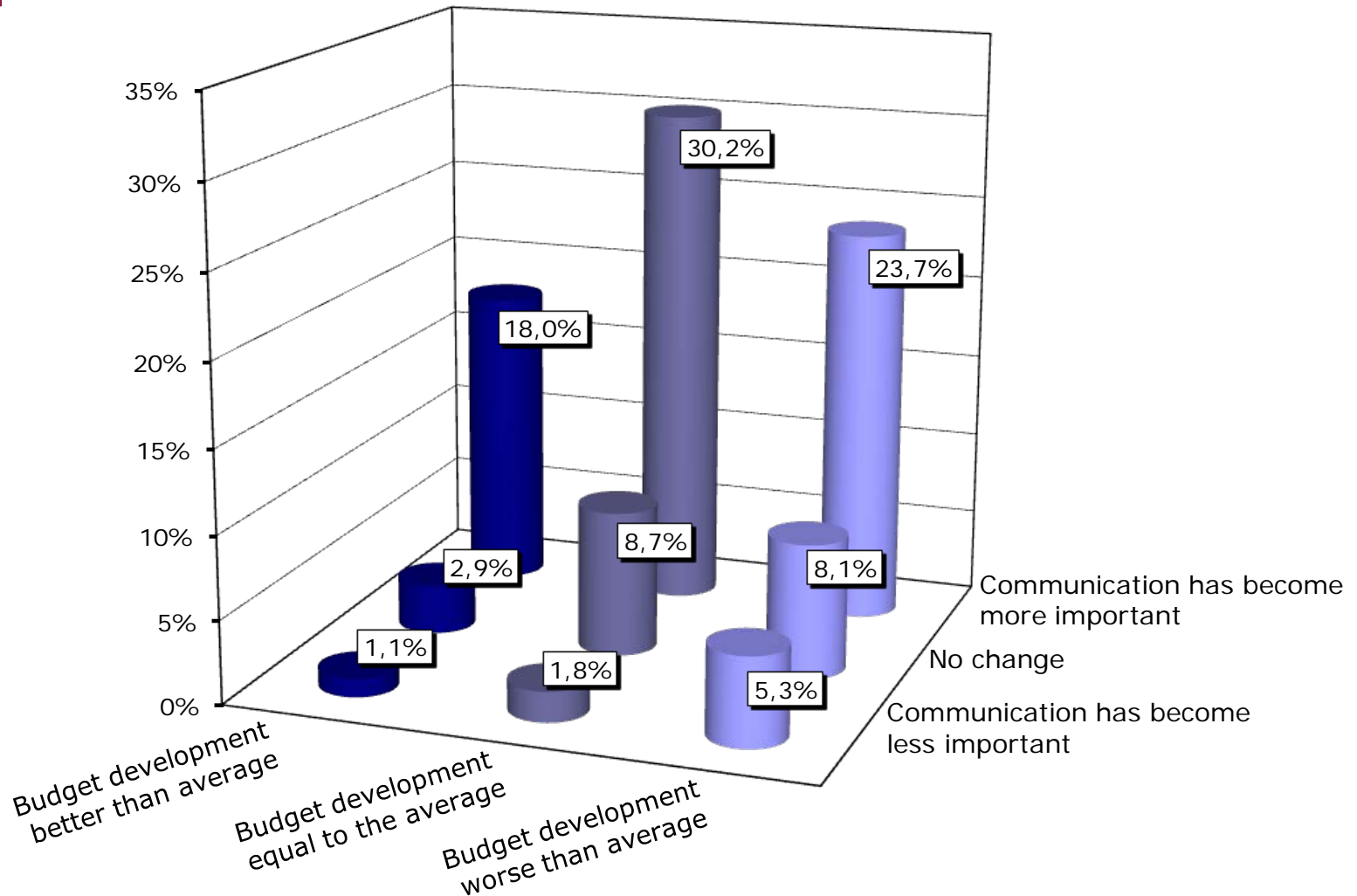




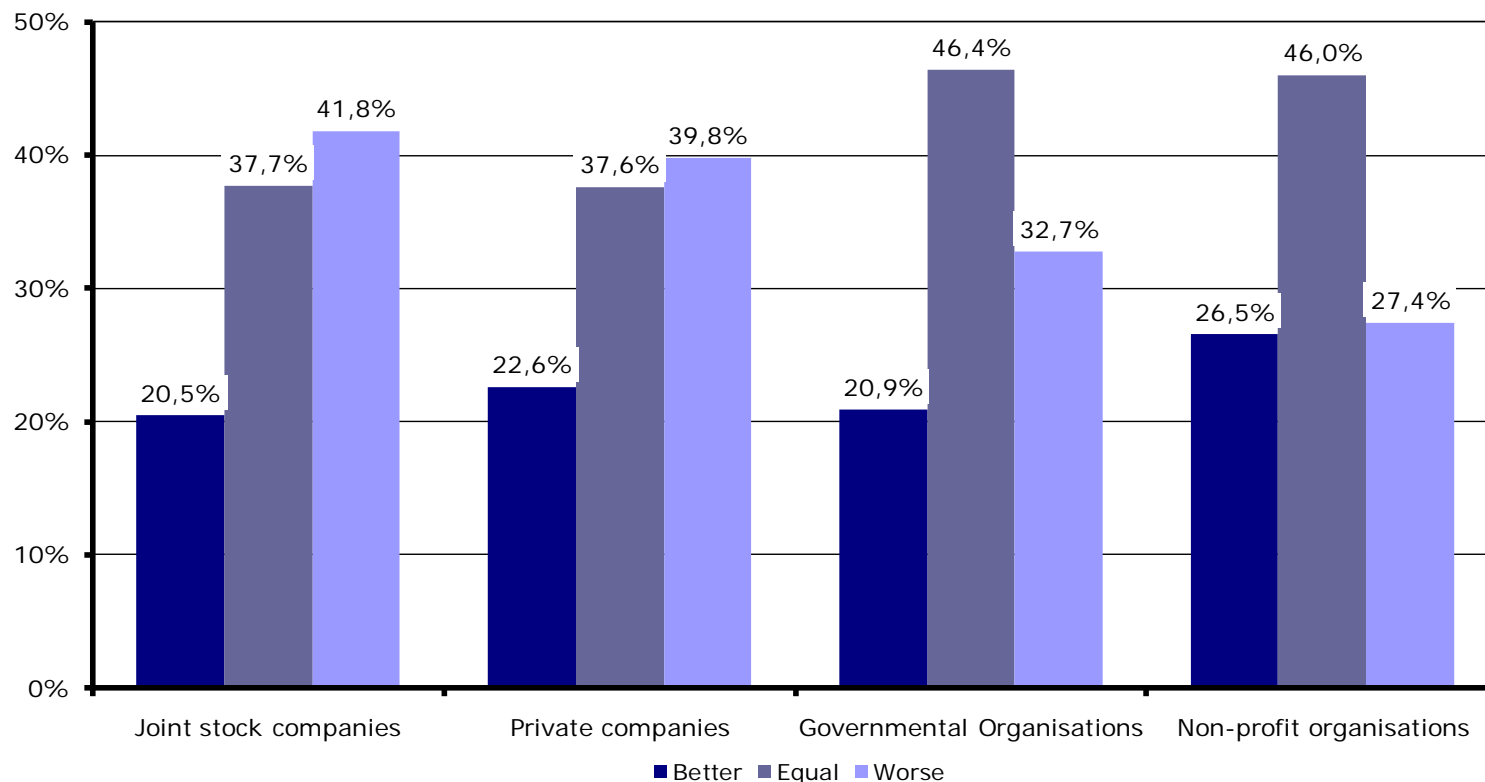
However, only 22% have been able to strengthen their resources, while 37% have lost resources compared to other functions



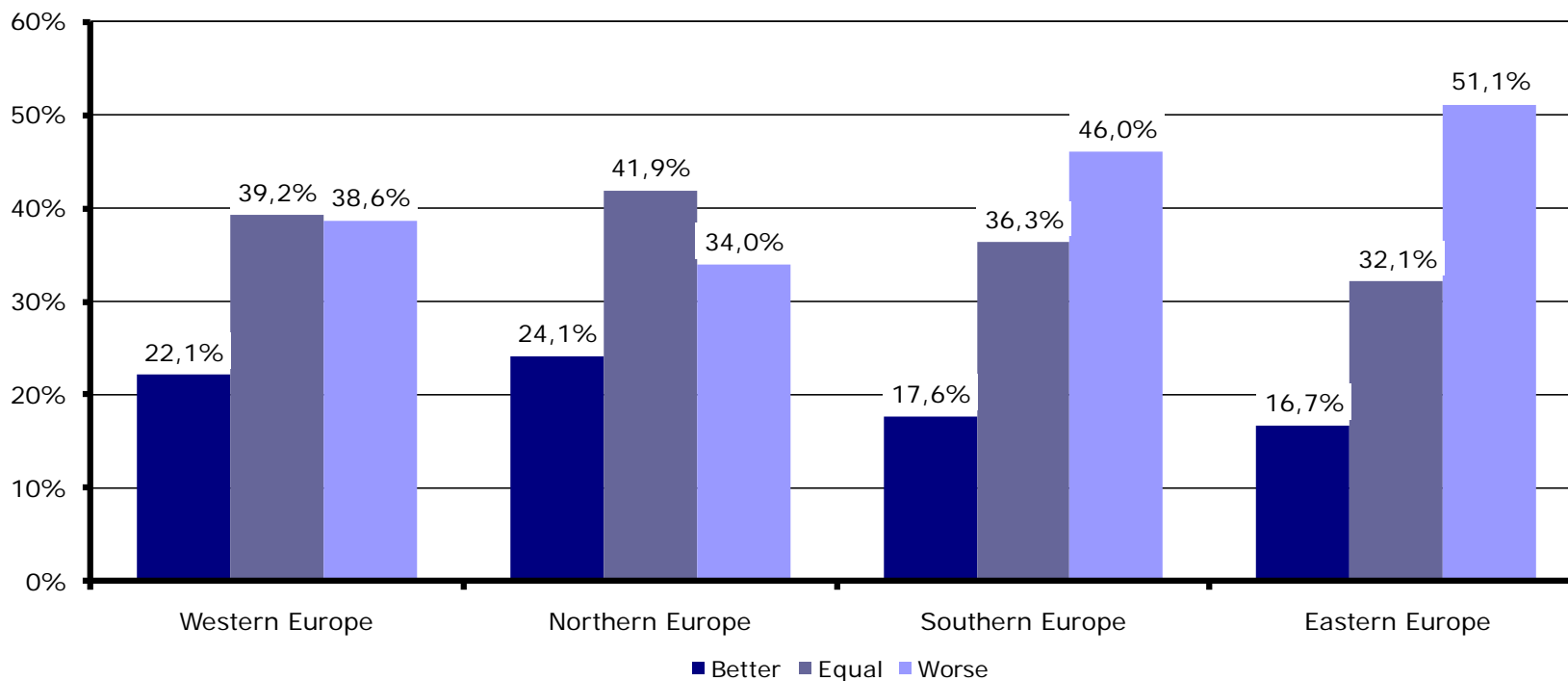
## Development of the communication function and budgets in Europe



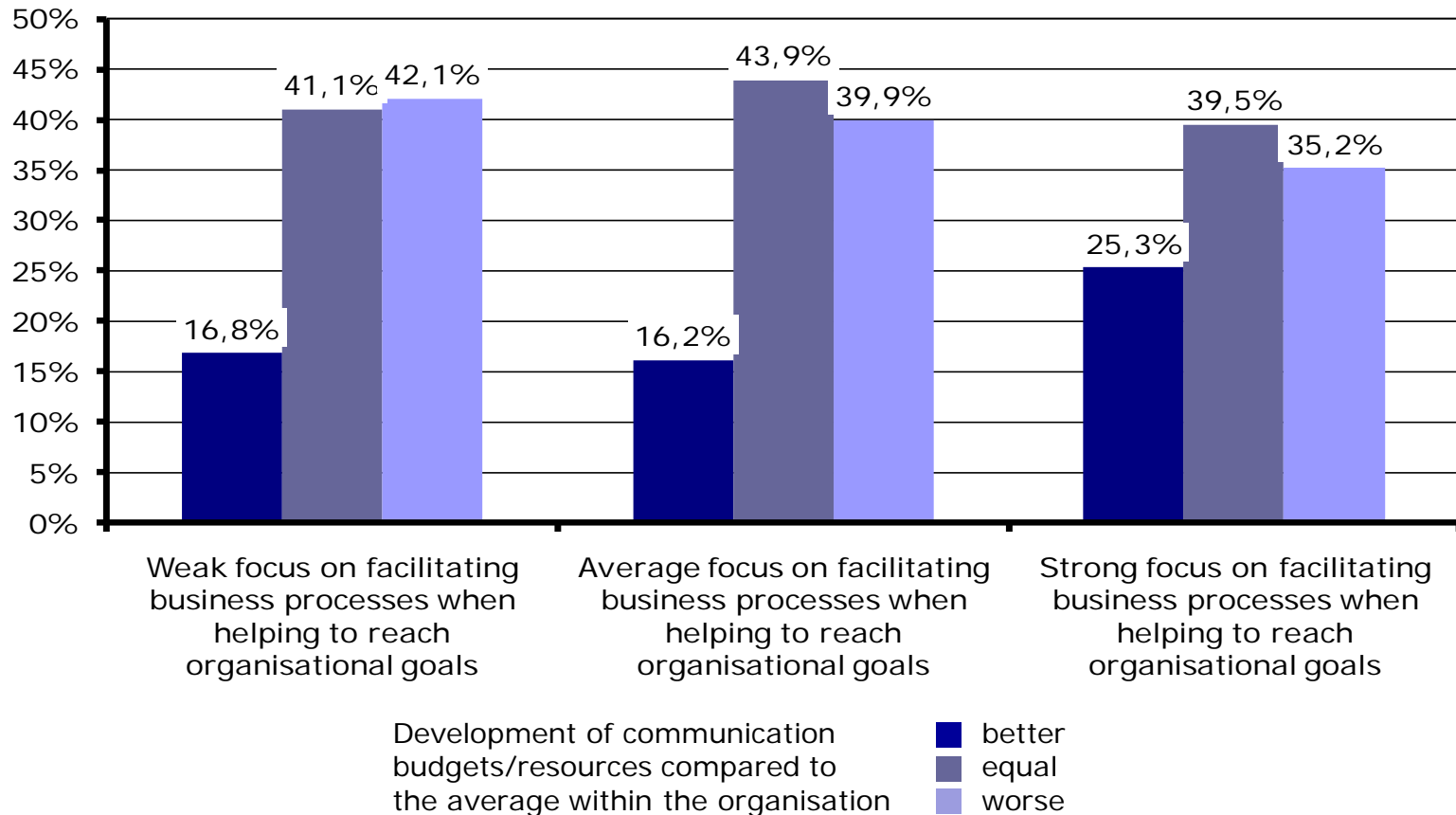
## Communication budgets and resources developed comparatively less well (worse) in joint stock and private companies



## Eastern European professionals report the strongest decline in resources



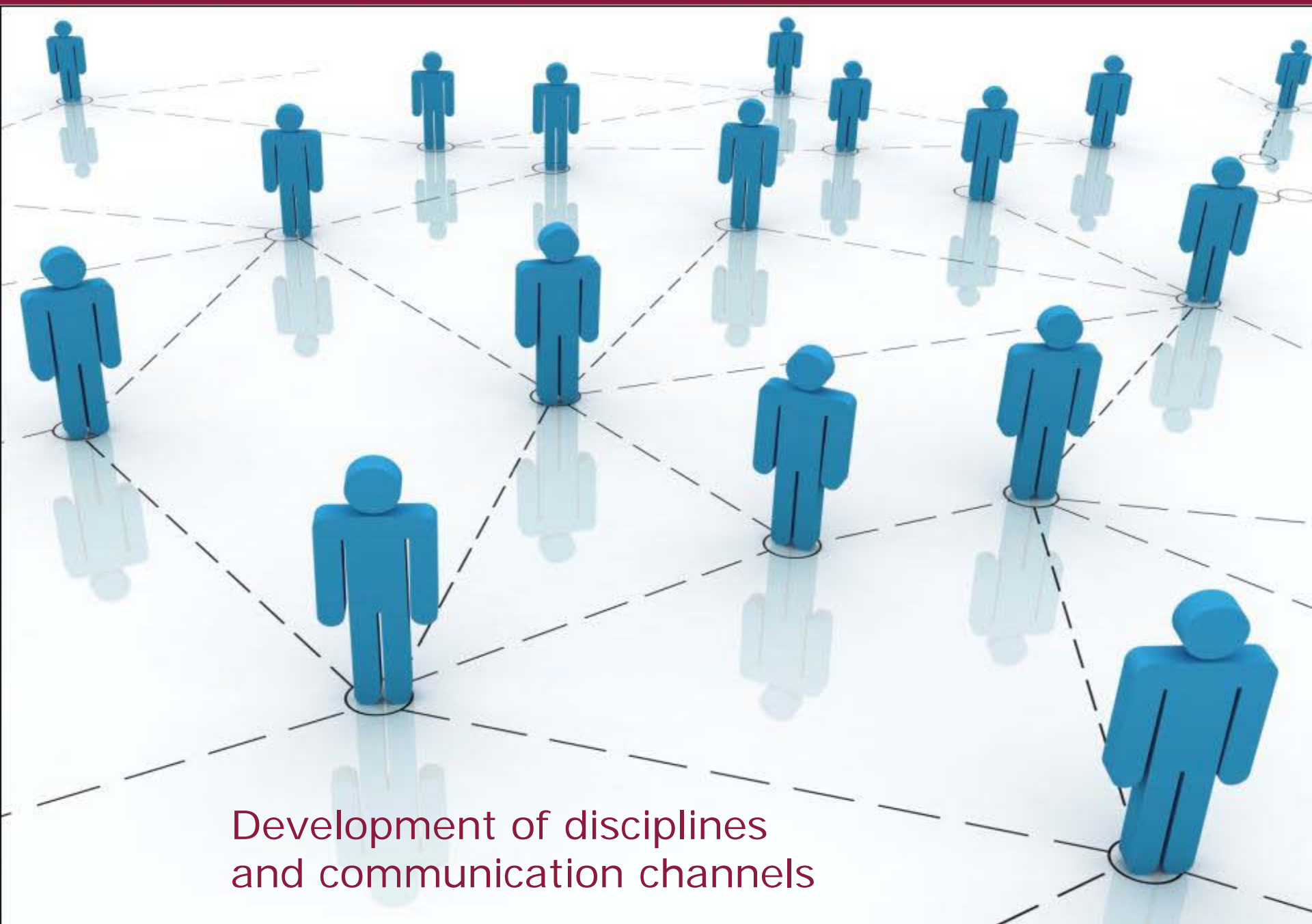
A clear focus on facilitating business processes correlates with a comparatively better development of communication budgets/resources



## Interpretation

### **In the economic downturn the importance of communication increased while budgets and resources developed worse compared to the average**

- Even though many practitioners state that communication has gained importance in the economic downturn, they have to cope with a rather large decrease in budgets and resources compared to other functions within the organisation.
- Eastern European professionals and those working in joint-stock companies report even worse developments of budgets and resources, compared to their peers working in other regions and types of organisations.
- Nevertheless, almost one out of five respondents (18%) says communications has both become more important and gained budgets and resources during the recession. There is a statistically significant correlation between the relevance of communication and resources – PR professionals have gained more or lost less, if communication has become more important in their organisation.
- Communication departments with a strong focus on supporting organisational goals by facilitating business processes (i.e. by influencing consumer preferences and motivating employees) report a significantly better development of resources during the recession. This points to limitations in some mainstream paradigms in corporate communications which capitalise mainly on image and reputation (i.e. Balmer & Greyser 2003, Van Riel & Fombrun 2007, Hatch & Schultz 2008, Klewes & Wreschniok 2009, Carroll 2010), rather than focusing on the support of business processes to achieve the organisation's defined goals in a broader sense (i.e. Grunig et al. 2002, Van Ruler & Vercic 2005, Zerfass 2008, Hamrefors 2009).



Development of disciplines  
and communication channels

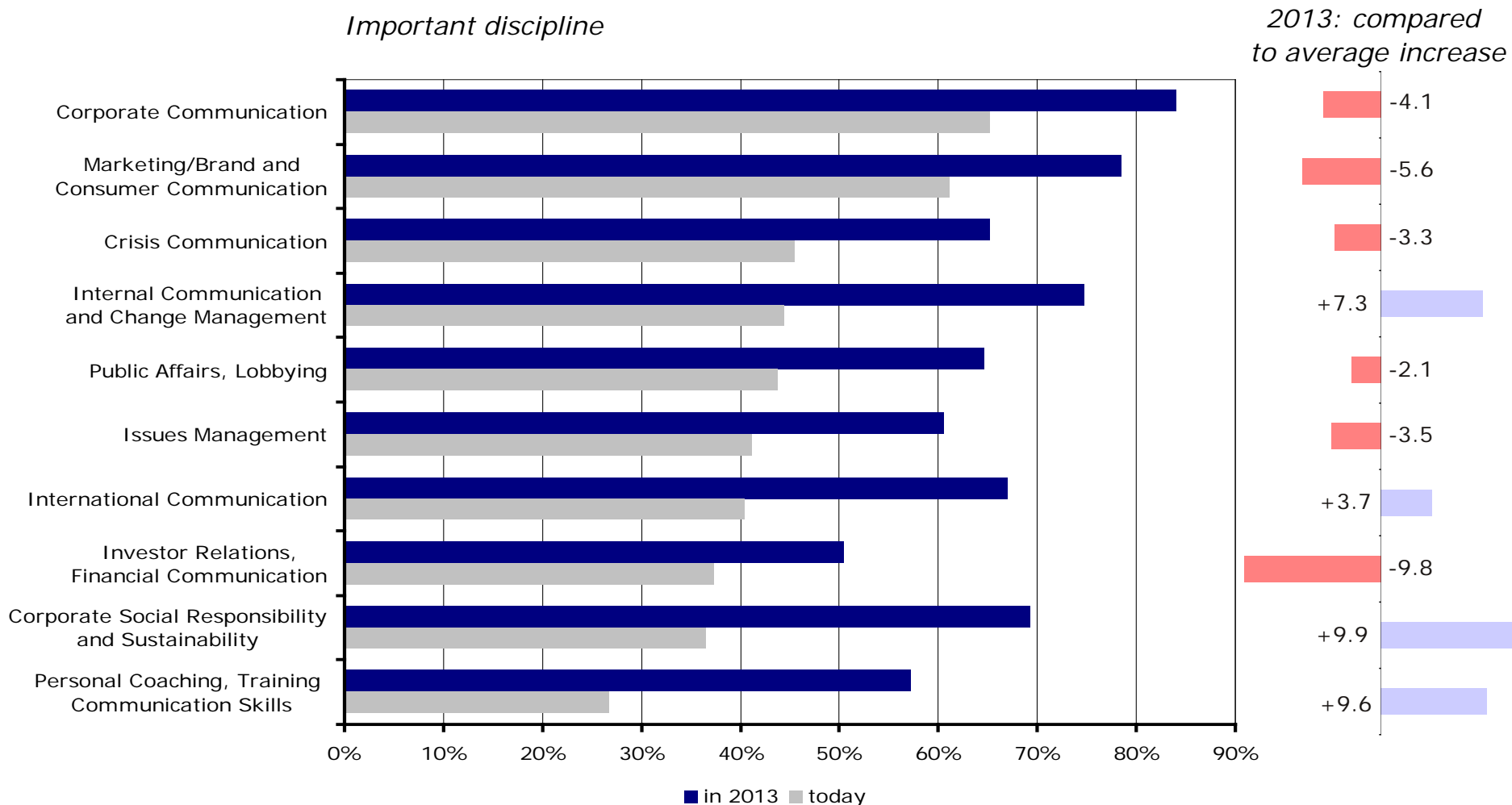
## Most important disciplines in communication management

Today		In 2013	
1	Corporate Communication	1	Corporate Communication →
2	Marketing/Brand and Consumer Communication	2	Marketing/Brand and Consumer Communication →
3	Crisis Communication	3	Internal Communication and Change Management ↗
4	Internal Communication and Change Management	4	CSR and Sustainability ↑
5	Public Affairs/Lobbying	5	International Communication ↑

www.communicationmonitor.eu / Zerfass et al. 2010 / n<sup>max</sup> = 1,926 PR professionals from 46 European countries;  
 Q 5: How important are the following fields of practice in your organisation or consultancy? Will they gain more or less importance within the next three years? (1 = Not important; 5 = Very important; important discipline = scale points 4-5).  
 Arrow symbols indicate changes within the ranking of most important disciplines; in general, all disciplines are expected to ascend.

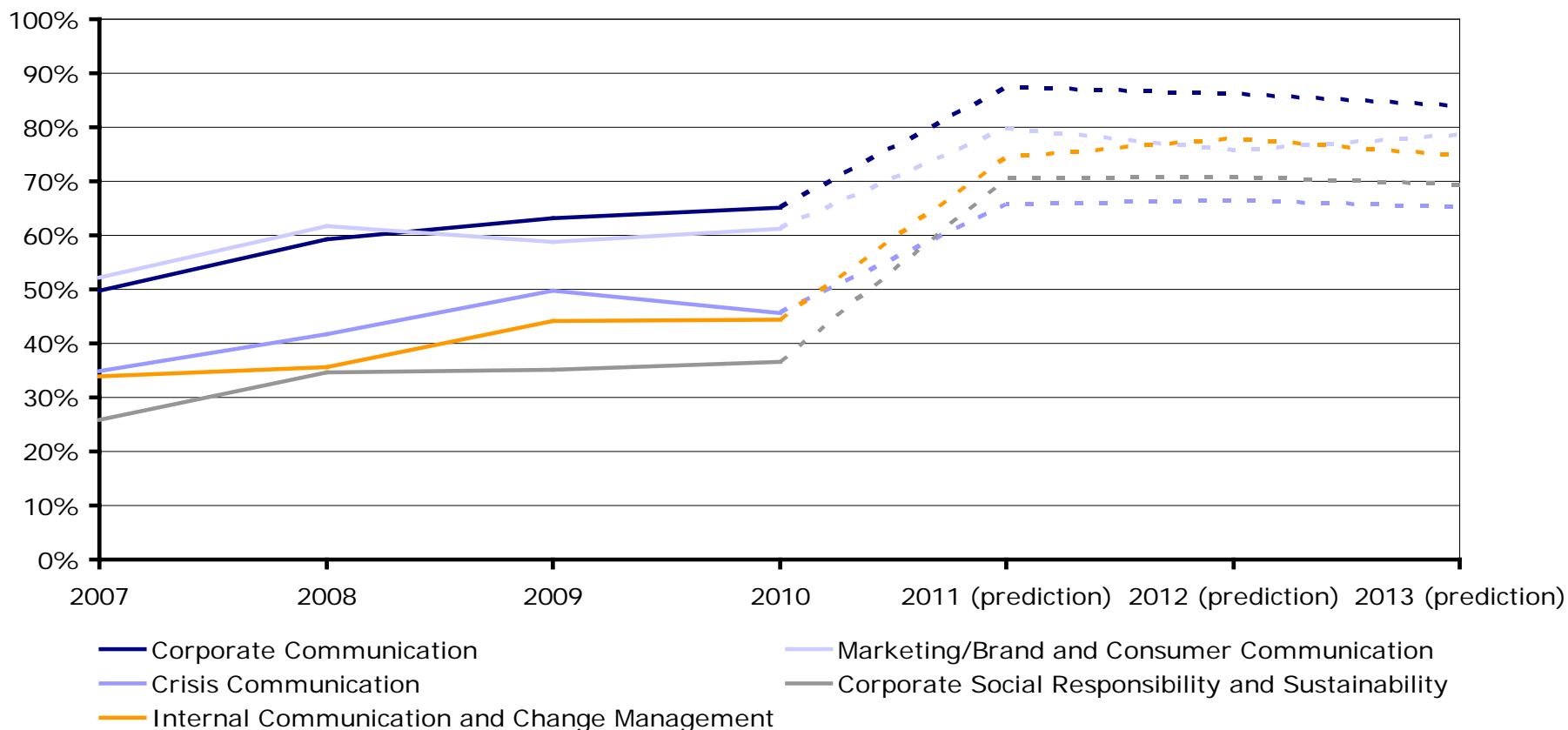


## Expected development of disciplines and fields of practice

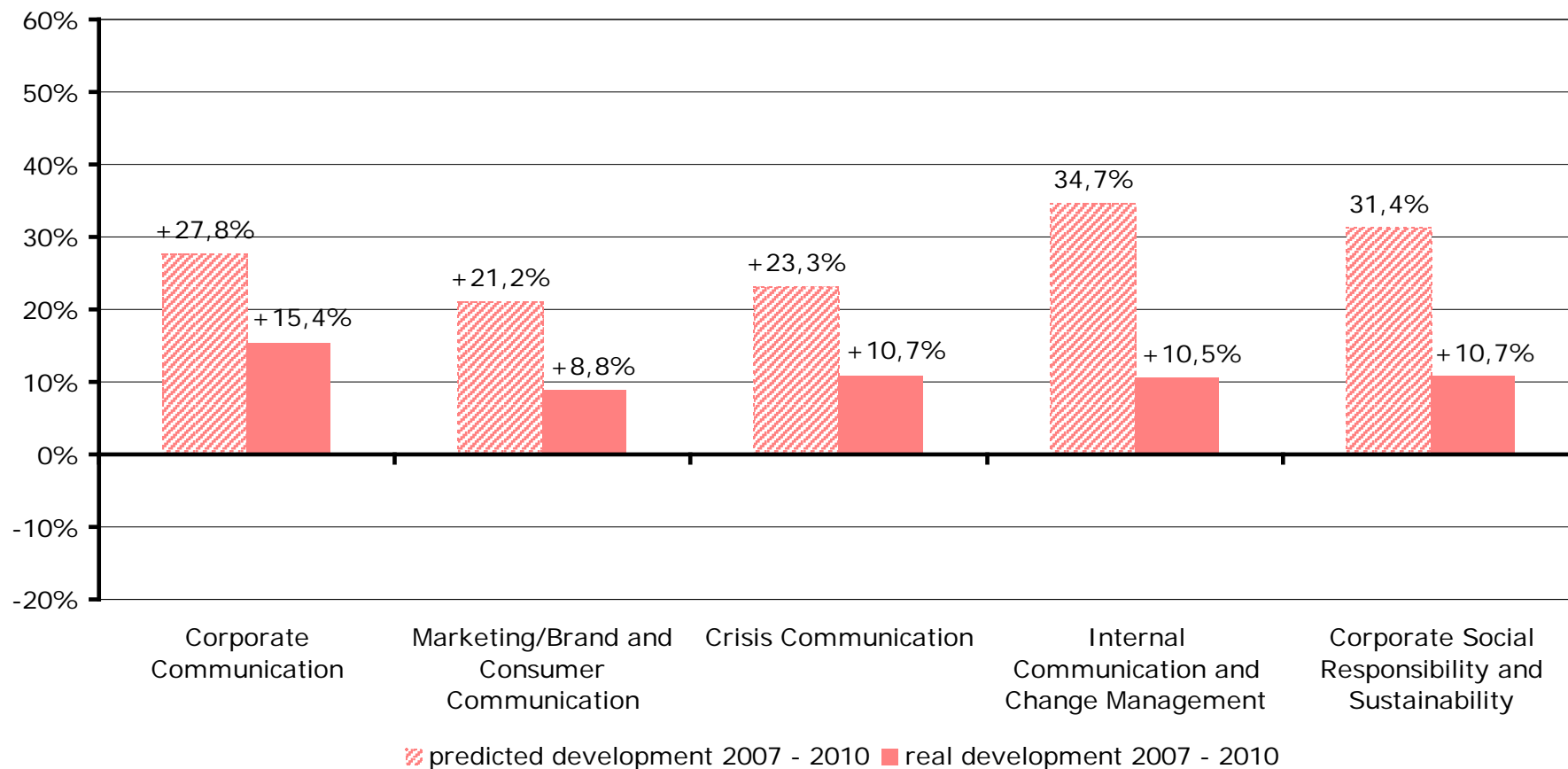


## Corporate Communication and Internal Communication are steadily growing, while Marketing has lost ground

*Importance of fields of practice in communication management*



Comparison with previous surveys shows that PR professionals regularly overestimate the growth of disciplines



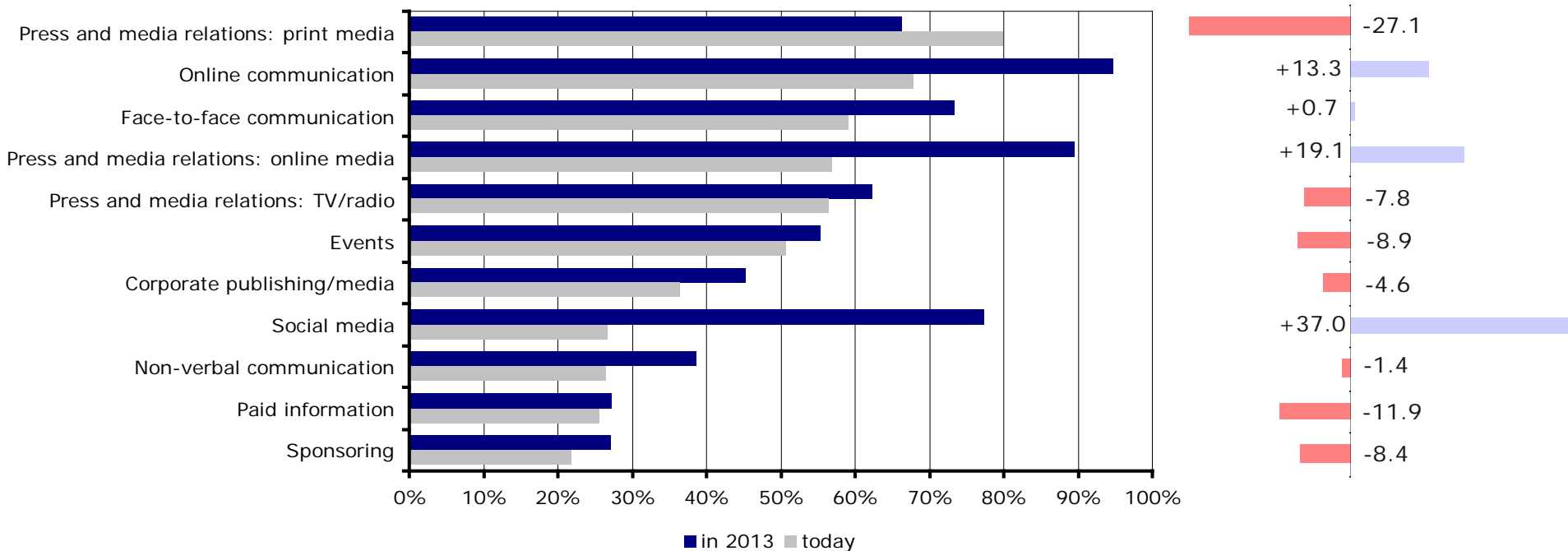
## Important channels and instruments

Today		In 2013		
1	Press and media relations: print media	1	Online communication	↗
2	Online communication	2	Press and media relations: online media	↑
3	Face-to-face communication	3	Social media	↑
4	Press and media relations: online media	4	Face-to-face communication	↘
5	Press and media relations: TV/radio	5	Press and media relations: print media	↓

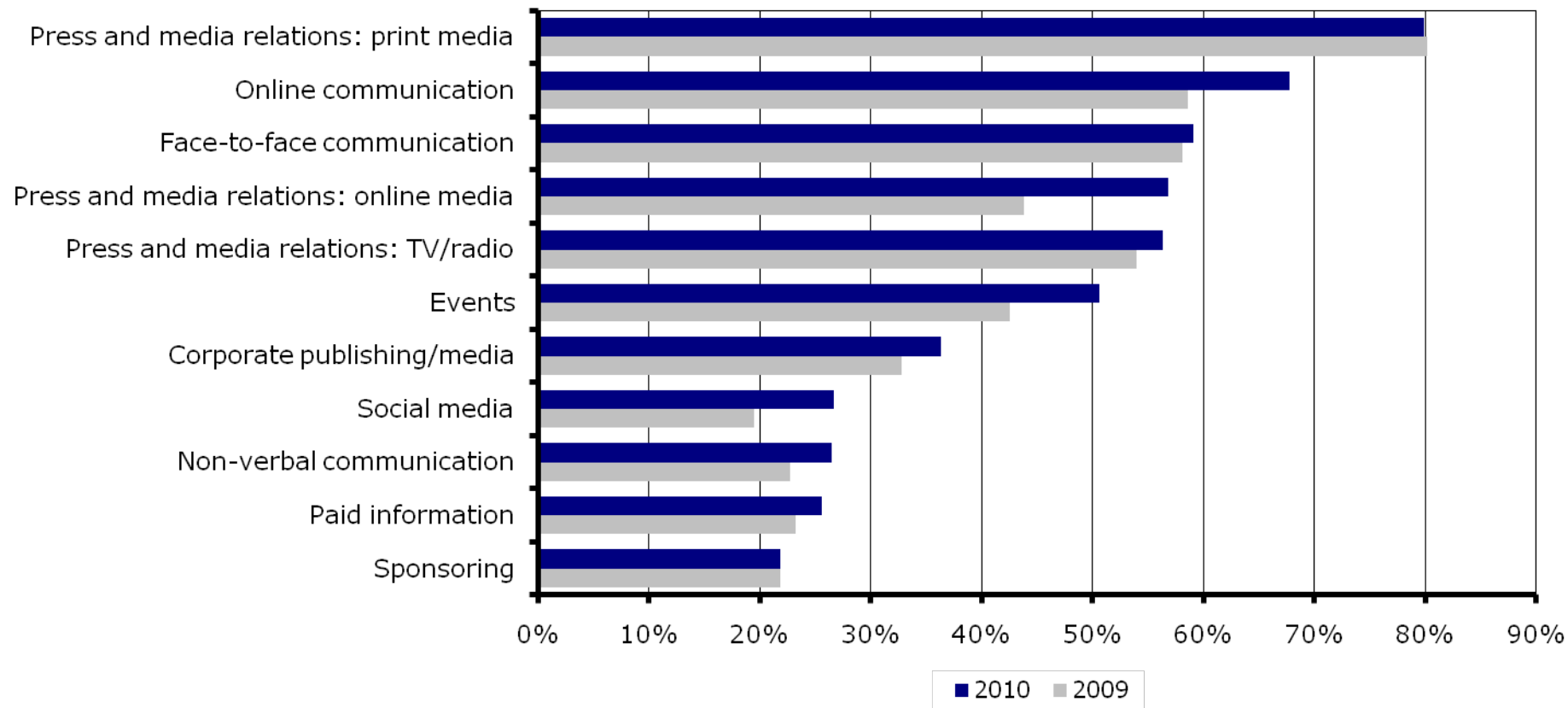
## Expected development of communication channels

*Important instrument*

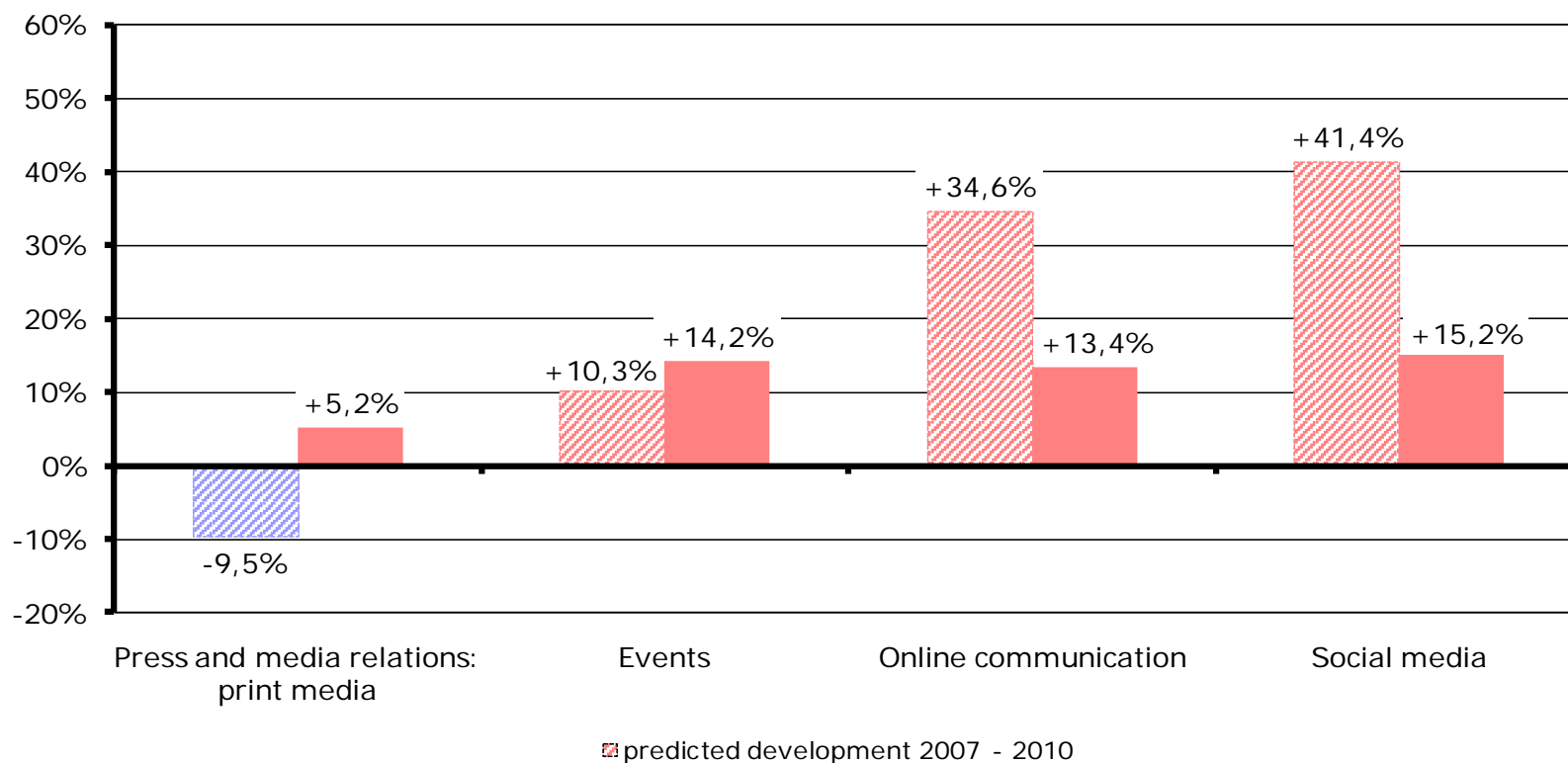
*2013: compared to average increase*



## Respondents value instruments more than they did in last year's survey



Media relations with print journalists were expected to decrease – in fact, they increased between 2007 and 2010



## Growth of online channels was clearly overestimated

<i>Important instruments</i>	<b>Predicted development 2007-2010</b>	<b>Real development 2007-2010</b>	<b>Variation</b>
Press and media relations: print media	-9,5%	+5,2%	<b>+14,7%</b>
Online communication	+34,6%	+13,4%	<b>-21,2%</b>
Face-to-face communication	+25,9%	+13,4%	-12,5%
Social media	+41,4%	+15,2%	<b>-26,2%</b>
Press and media relations: online media	+43,2%	+18,4%	<b>-24,8%</b>
Press and media relations: TV/radio	+10,1%	+11,7%	+1,6%
Events	+10,3%	+14,2%	<b>+3,9%</b>
Corporate publishing/media	+11,8%	+4,4%	-7,4%
Non-verbal communication	+14,1%	+4,2%	-9,9%
Paid information	+4,2%	+0,9%	-3,3%
Sponsoring	+6,5%	+2,0%	-4,5%



## Valuation of communication instruments in different organisational cultures

<i>Important instruments</i>	<b>Inte- grated</b>	<b>Inter- active</b>	<b>Entrepre- neurial</b>	<b>Syste- matised</b>
Press and media relations				
- addressing print media	83.2%	78.9%	75.5%	70.1%
- addressing online media	62.2%	49.7%	50.0%	46.8%
- addressing TV/radio	60.8%	49.7%	55.6%	47.2%
Corporate publishing/media	38.1%	34.0%	38.0%	31.8%
Online communication	72.4%	65.2%	60.2%	56.0%
Social media	31.9%	17.8%	22.0%	24.4%
Events	51.9%	48.2%	48.6%	49.0%
Sponsoring	24.0%	15.7%	19.6%	21.4%
Face-to-face communication	63.0%	54.1%	50.5%	52.9%
Non-verbal communication	29.6%	23.9%	18.3%	20.5%
Paid information	28.2%	18.5%	22.9%	24.4%
n =	1,182	345	110	317

### **Integrated culture**

- participative towards people
- proactive towards environment

### **Interactive culture**

- participative towards people
- reactive towards environment

### **Entrepreneurial culture**

- non-participative towards people
- proactive towards environment

### **Systematised culture**

- non-participative towards people
- reactive towards environment

## Interpretation

### **Internal communication and CSR are growing, more disciplines are following**

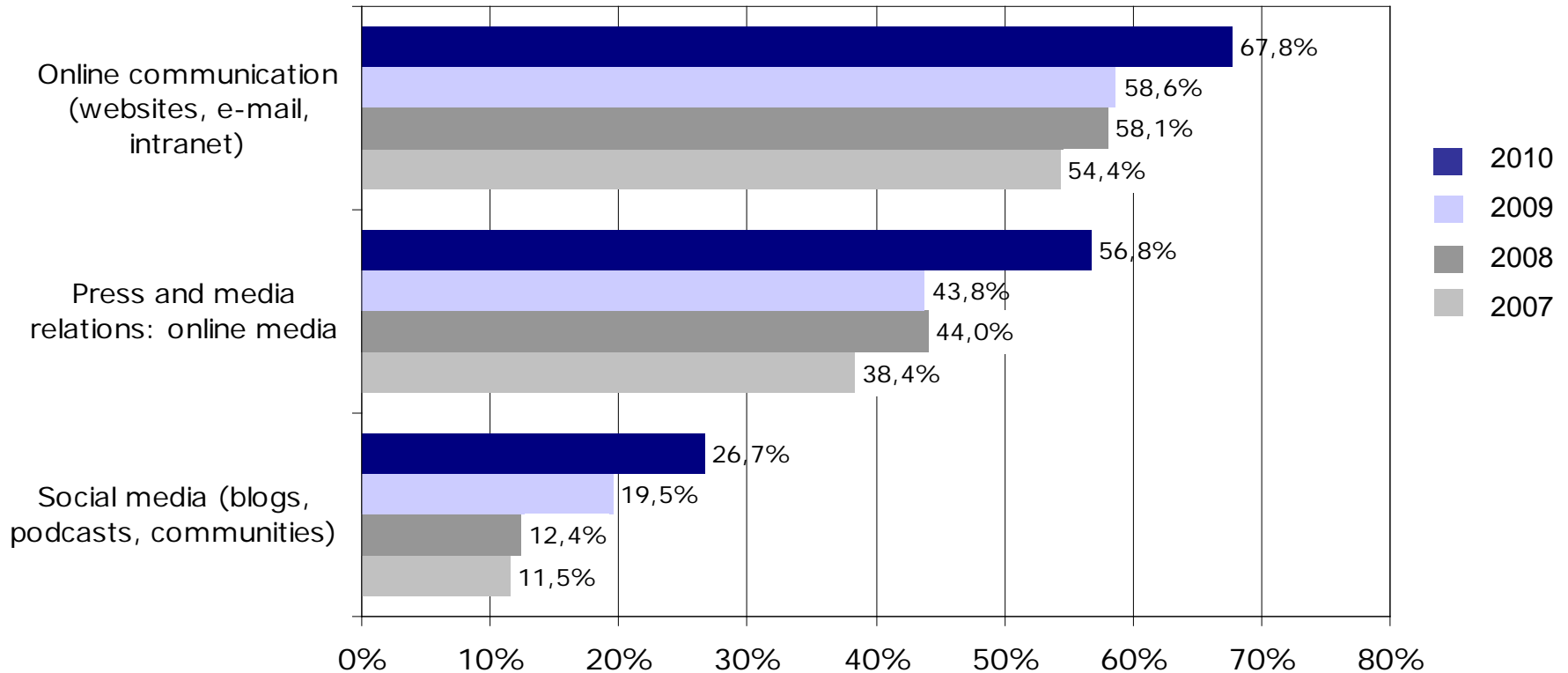
- \_ The survey predicts a changing relevance of the various disciplines within the broad range of strategic communication. Corporate communication is most important, followed by long-time forerunner marketing/brand communication. While internal communication and corporate social responsibility communication are continuing their upswing, predictions for personal coaching and international communication are above the average for the first time since 2007.
- \_ Regarding communication instruments, online communications, media relations on the web and social media have risen since 2009 and are expected to grow further.
- \_ For the first time, it was possible to compare predictions for the future from previous surveys (Zerfass et al. 2007) with actual insights from the same focal year 2010. Obviously, PR professionals regularly overestimate the growth of disciplines and communication channels. For example, CSR did only grow by 11% in three years instead of 31% as predicted in 2007. Press relations targeting print media was expected to decline by 9.5% from 2007-2010; in fact it increased by 5.2%. Also, social media was thought to rise by 41.4%, but it was only 15.2%.



Online communication and social media

# Online communication and social media made a great leap forward during the last 12 months

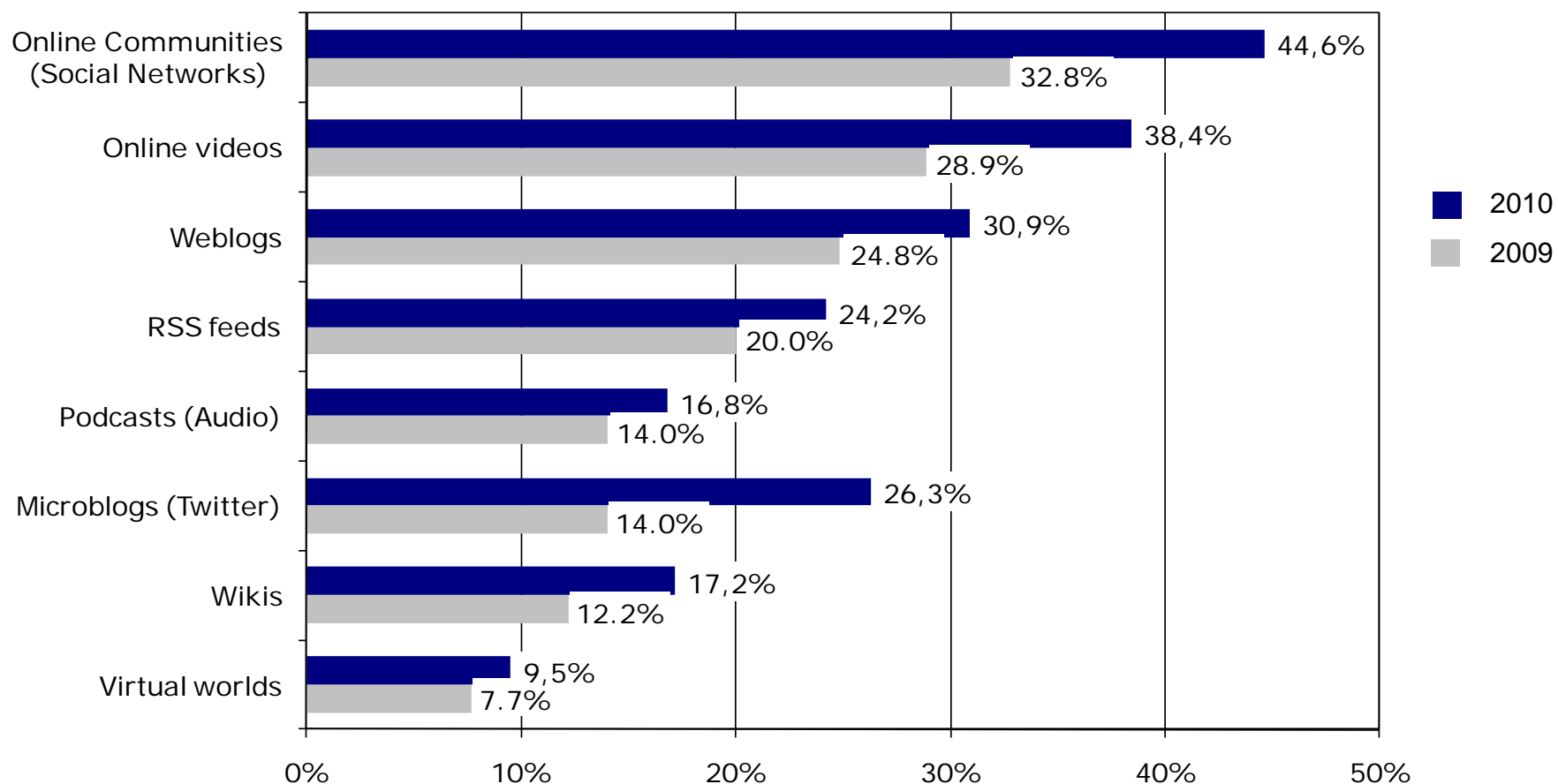
*Important instruments for addressing stakeholders, gatekeepers and audiences*



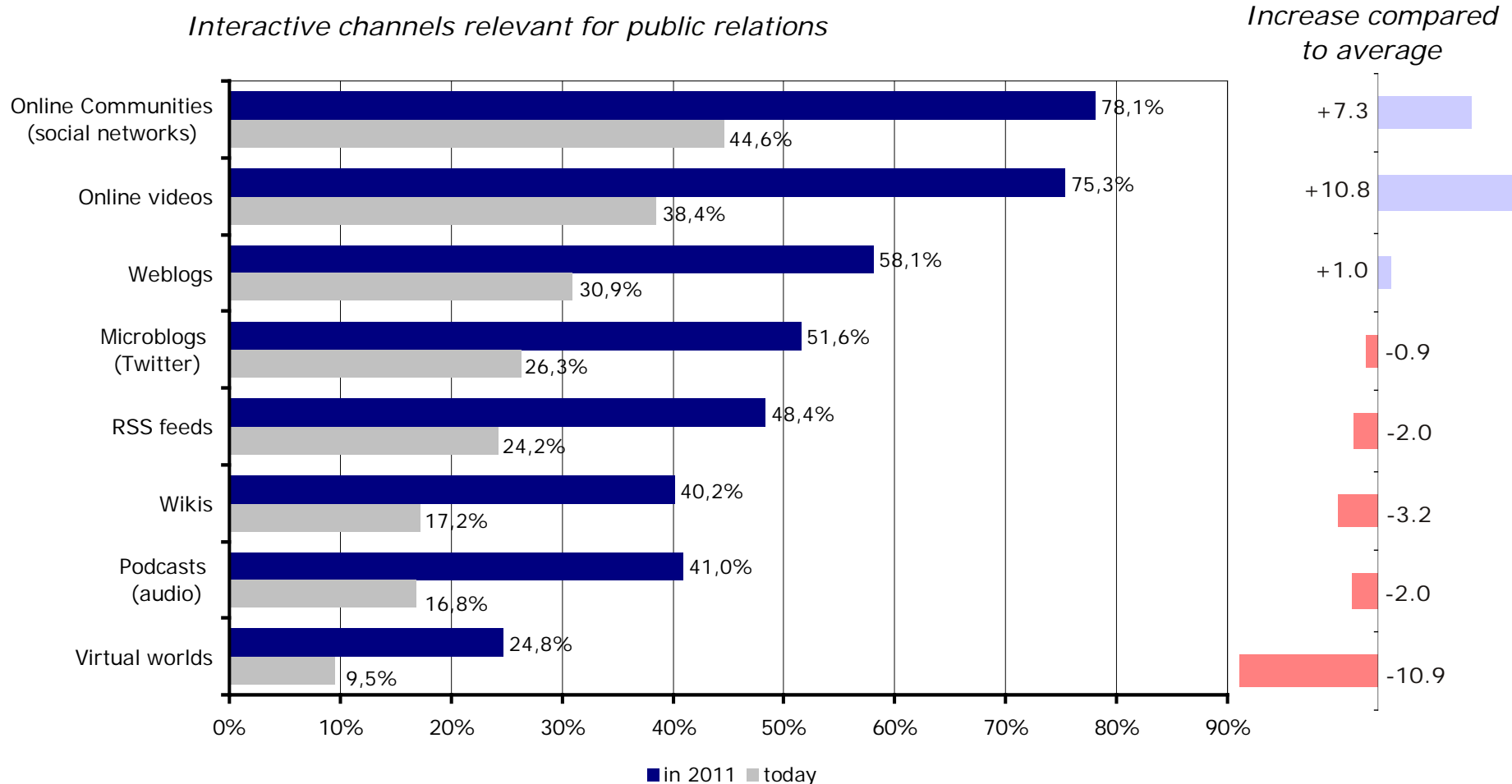
www.communicationmonitor.eu / Zerfass et al. 2010 / n<sup>max</sup> = 1,914 PR professionals from 46 European countries; Q 6; Zerfass et al. 2009 / n<sup>max</sup> = 1,863; Q 5; Zerfass et al. 2008 / n = 1,524; Q 3; Zerfass et al. 2007/n = 1,087; Q 4: How important are the following methods in addressing stakeholders, gatekeepers and audiences? (1 = Not important; 5 = Very important; important = scale points 4-5).

## Social media channels: Online communities are now clearly ahead; also web videos and Twitter have prospered between 2009 and 2010

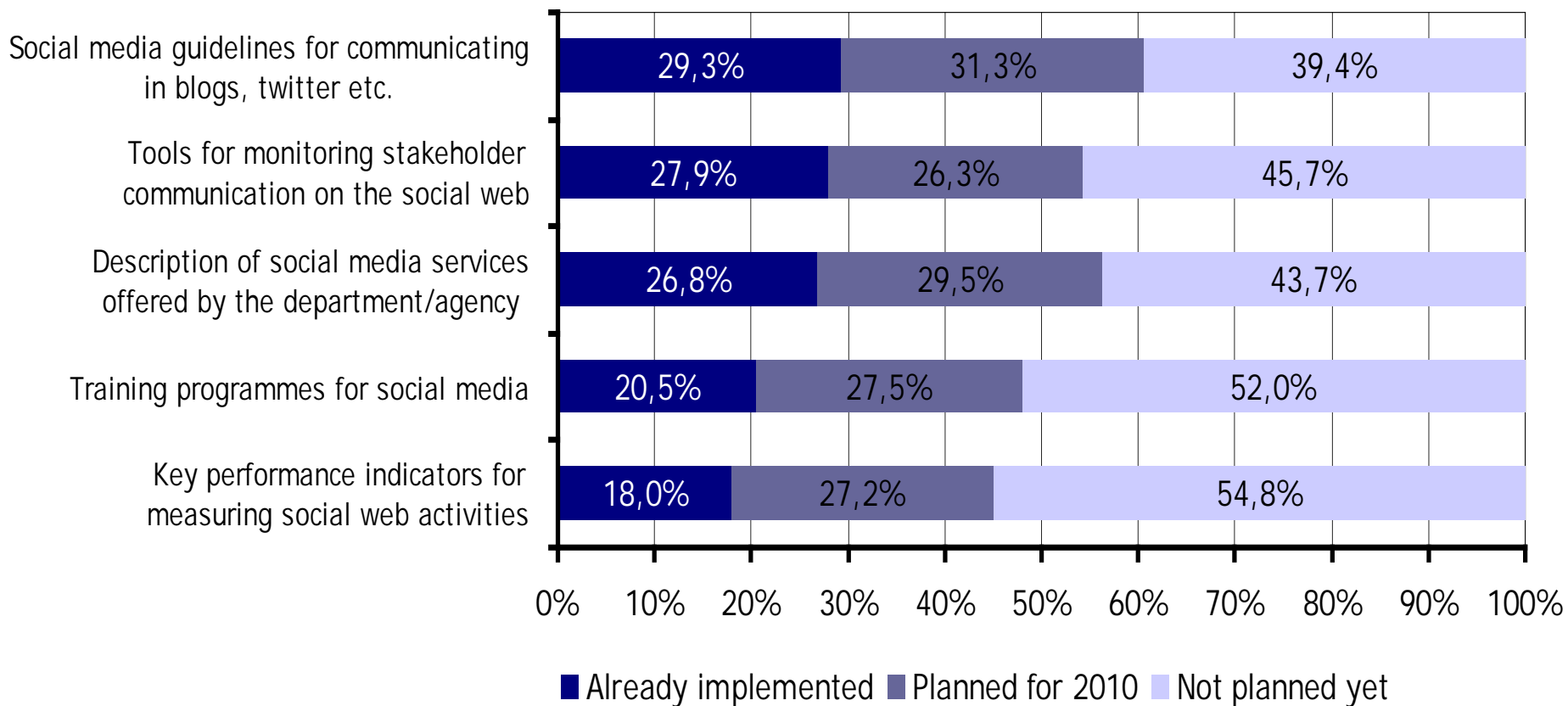
*Interactive channels important for public relations*



## PR professionals expect a heavy growth in importance of social media until 2011, with online videos leading the field



## However, most PR departments and agencies have still not implemented the basic prerequisites for social media usage



## Joint stock companies are at the cutting-edge when it comes to implementing specific concepts for social media

<i>Already implemented:</i>	<b>Joint stock</b>	<b>Private</b>	<b>Governmental</b>	<b>Non-profit</b>
Social media guidelines for communicating in blogs, twitter etc.	32.1%	25.7%	15.5%	24.3%
Tools for monitoring stakeholder communication on the social web	28.7%	23.3%	18.5%	21.2%
Key performance indicators for measuring social web activities	26.2%	17.4%	15.8%	23.9%
Training programmes for social media	16.0%	15.0%	11.8%	18.6%
Description of social media services offered by the department or agency	16.0%	16.7%	11.2%	15.9%

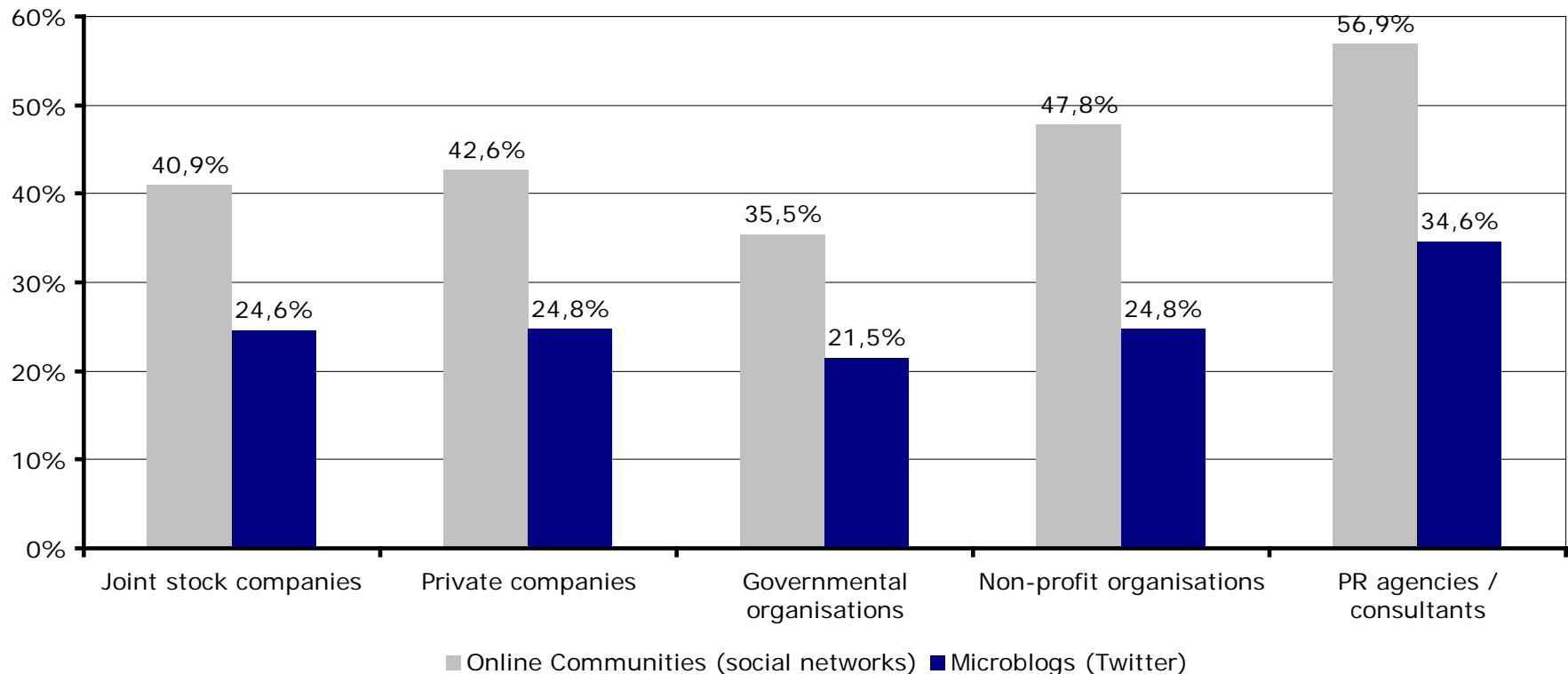


## Patterns of the evolving social media framework in PR in different European regions

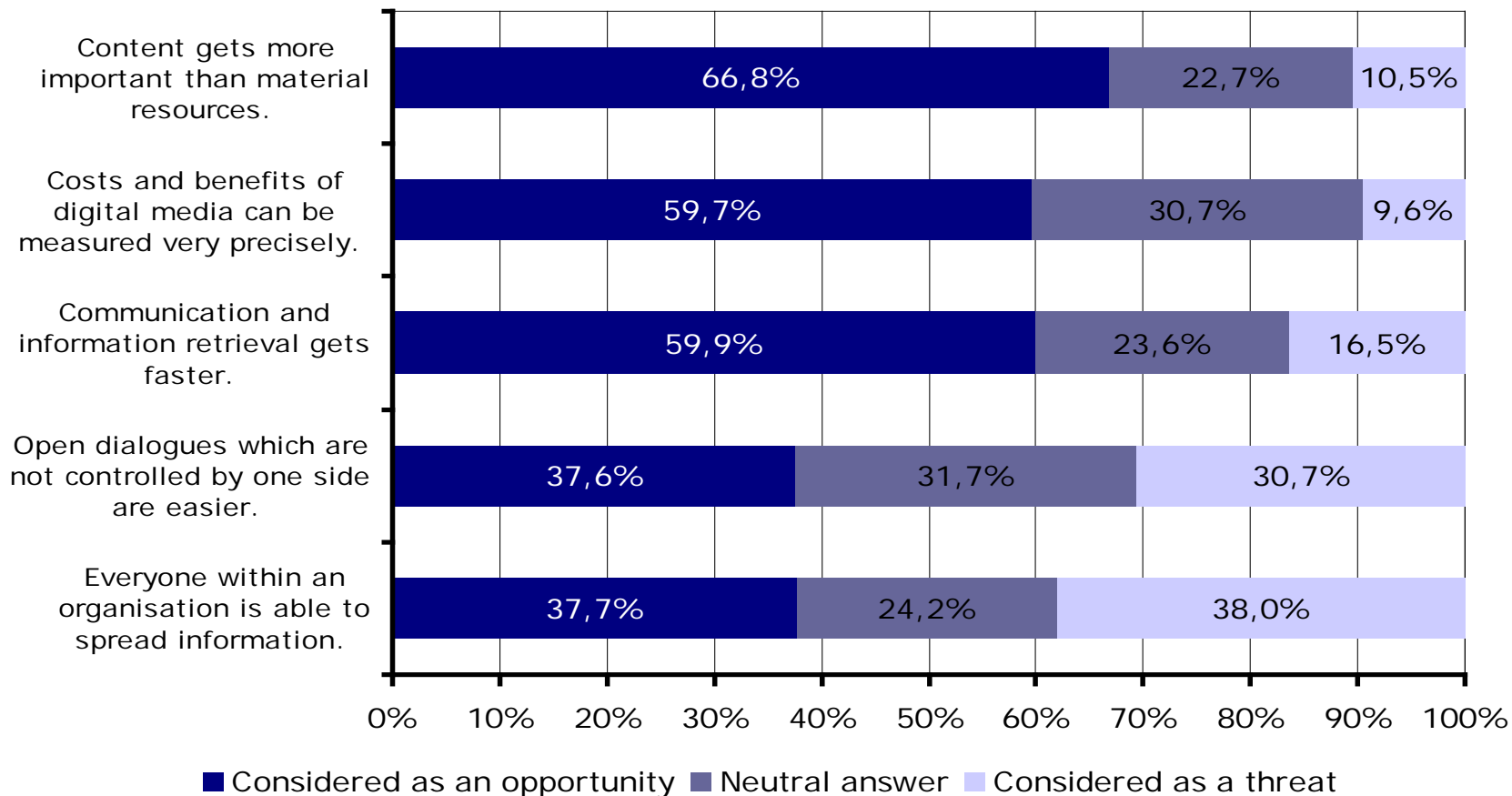
<i>Already implemented:</i>	<b>Northern Europe</b>	<b>Western Europe</b>	<b>Southern Europe</b>	<b>Eastern Europe</b>
Social media guidelines for communicating in blogs, twitter etc.	27.3%	32.1%	29.8%	27.1%
Tools for monitoring stakeholder communication on the social web	25.5%	32.9%	26.4%	26.2%
Key performance indicators for measuring social web activities	24.9%	28.1%	30.4%	21.3%
Training programmes for social media	19.9%	20.4%	22.7%	17.6%
Description of social media services offered by the department or agency	13.7%	20.1%	22.7%	15.4%

## Consultants and agencies have a stronger belief in social networks and Twitter than communication departments

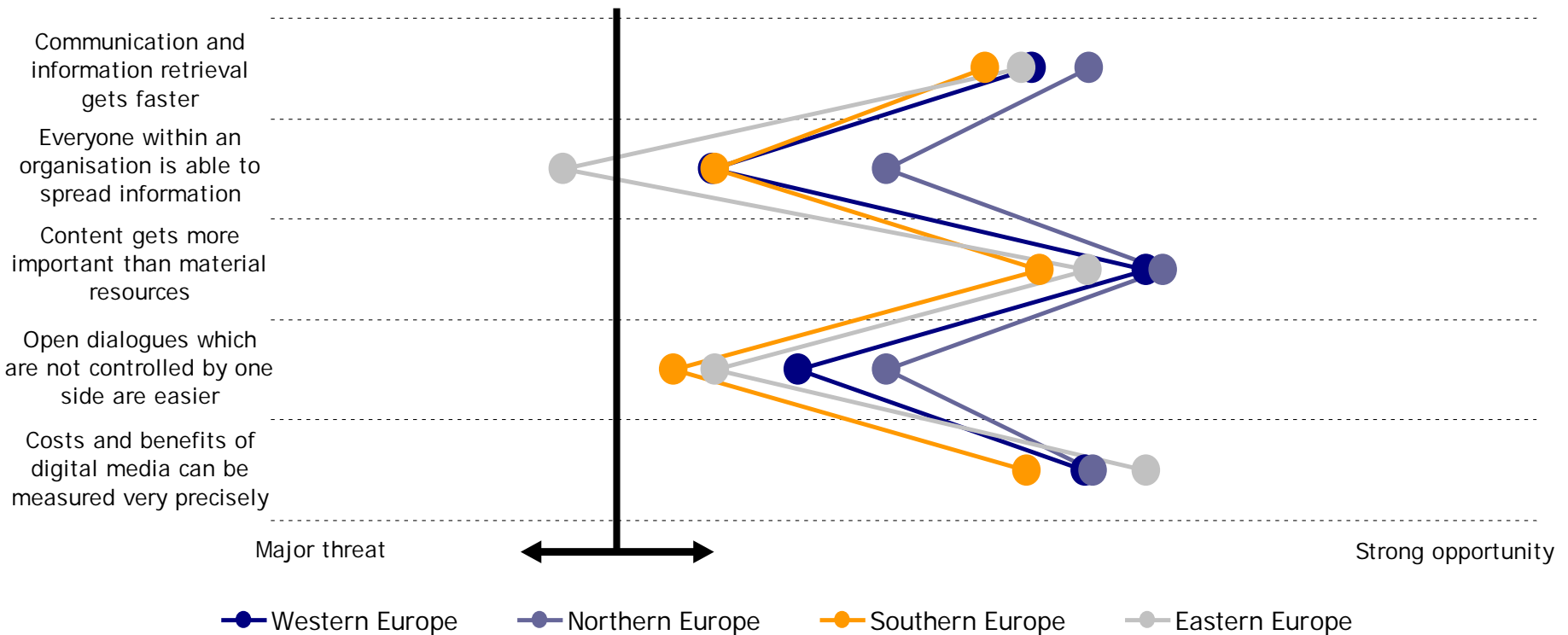
*Interactive channels relevant for public relations*



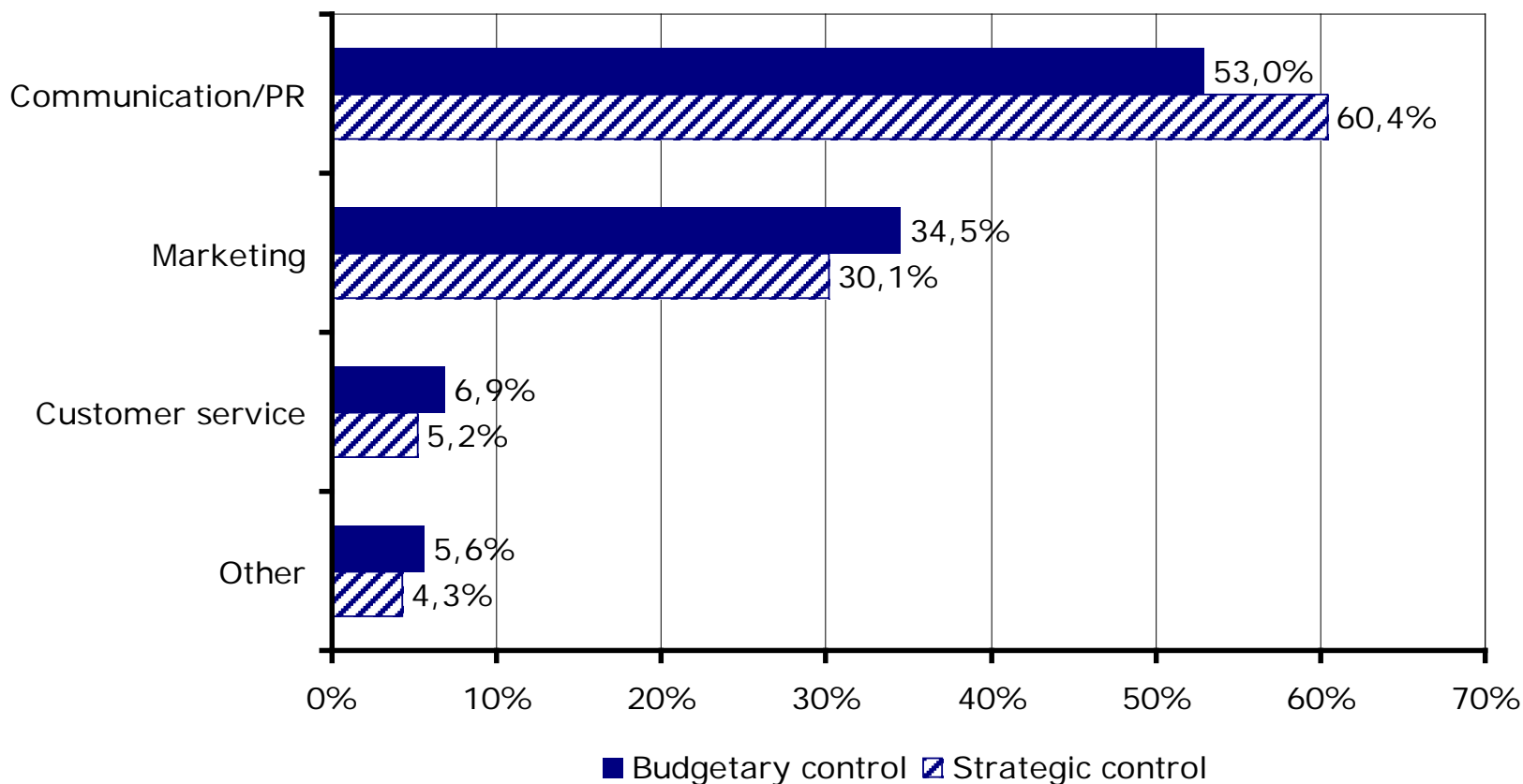
## Social media is mostly considered as an opportunity, though openness and loss of control are possible threats



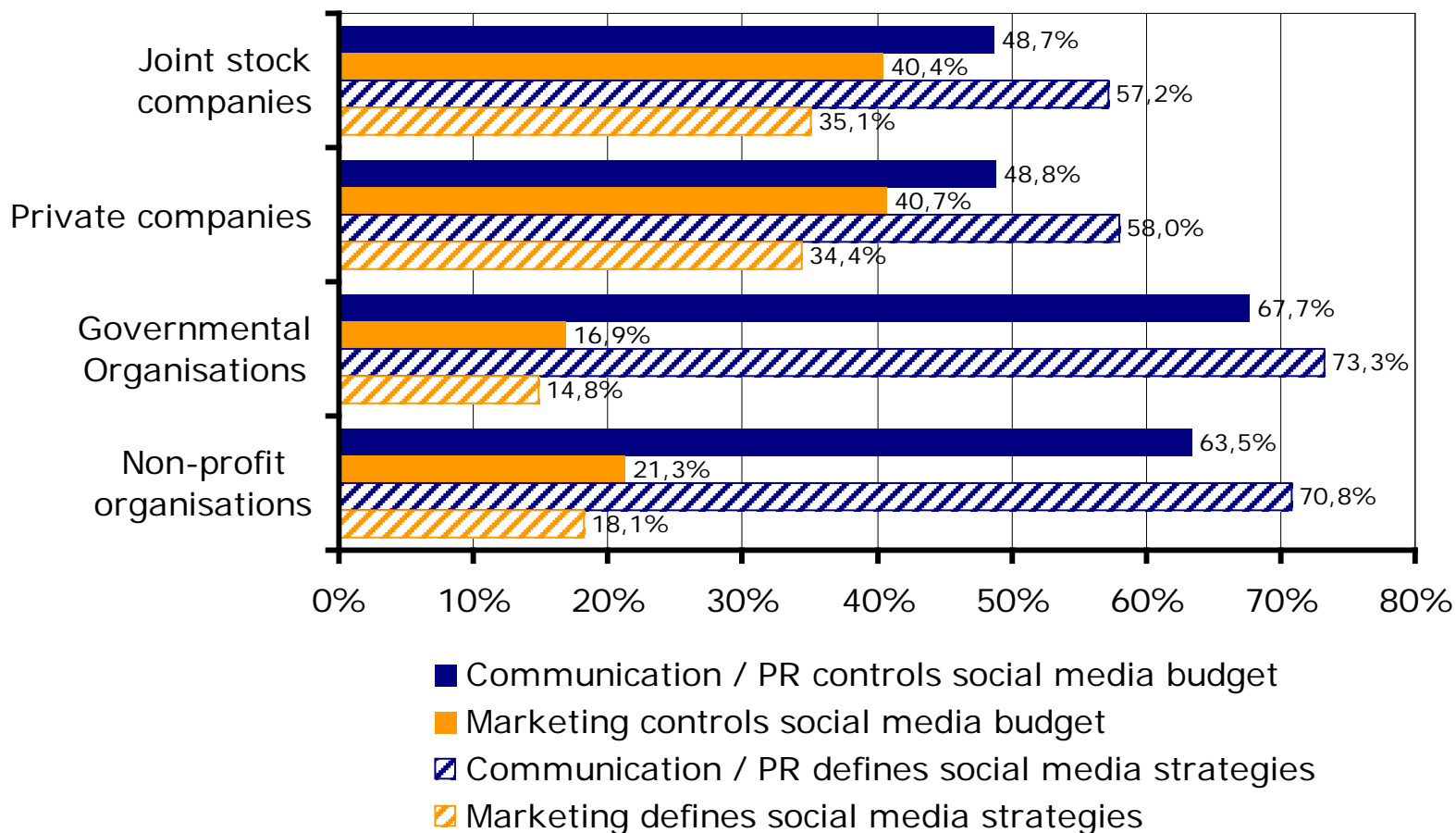
## Southern and Eastern European PR professionals are more sceptical about the effects of social media



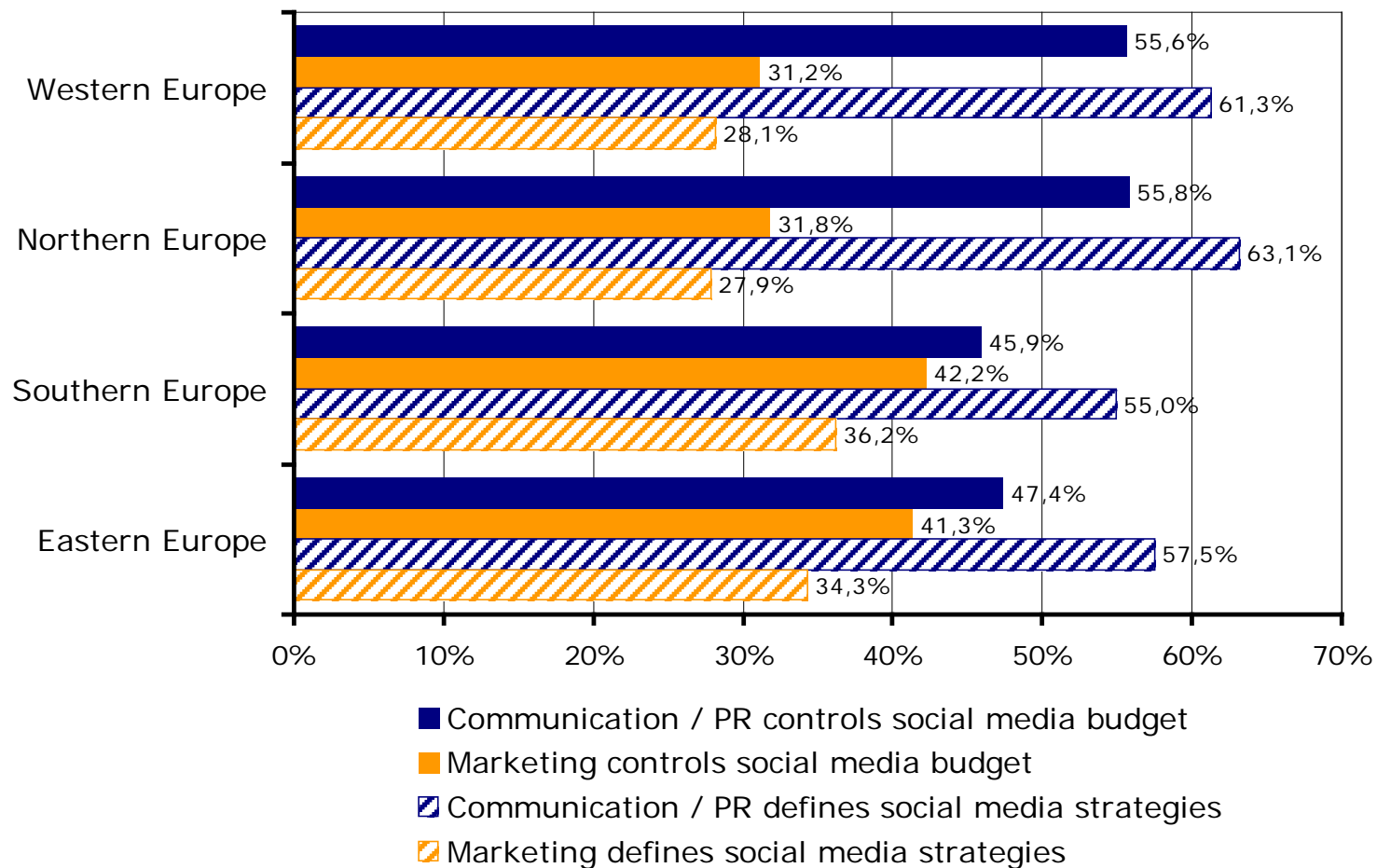
## Communication with digital and social media: PR departments define strategies, but marketing controls budgets



## Responsibility for digital and social media in different types of organisations



## Responsibility for digital and social media in European regions



## Interpretation

### **Breakthrough of online channels, but many questions linked to social media**

- \_ The continuing growth of online communications and social media has been accelerated during the last months. Today, 68% of respondents believe websites, e-mail and intranets are important instruments for addressing stakeholders, gatekeepers and audiences; compared to 59% in 2009. Support for online media relations and social media has grown even stronger. One out of four professionals thinks social media are important for the profession today.
- \_ Online communities (social networks) are the most important social media platform; Twitter is considered important by 26% of the respondents.
- \_ In spite of the enthusiasm, less than one third of organisations have already implemented necessary prerequisites for social media communication like social media guidelines, monitoring routines or even key performance indicators to define and evaluate measures of success.
- \_ While most features of social media are considered as an opportunity, many PR professionals (especially Eastern Europeans) rate open dialogue without control and the ease of spreading information as threats.
- \_ A majority of communication professionals claim they have strategic control of digital and social media. But resources are often assigned to the marketing function; less than half of the respondents working in joint-stock or private companies has budgetary control.



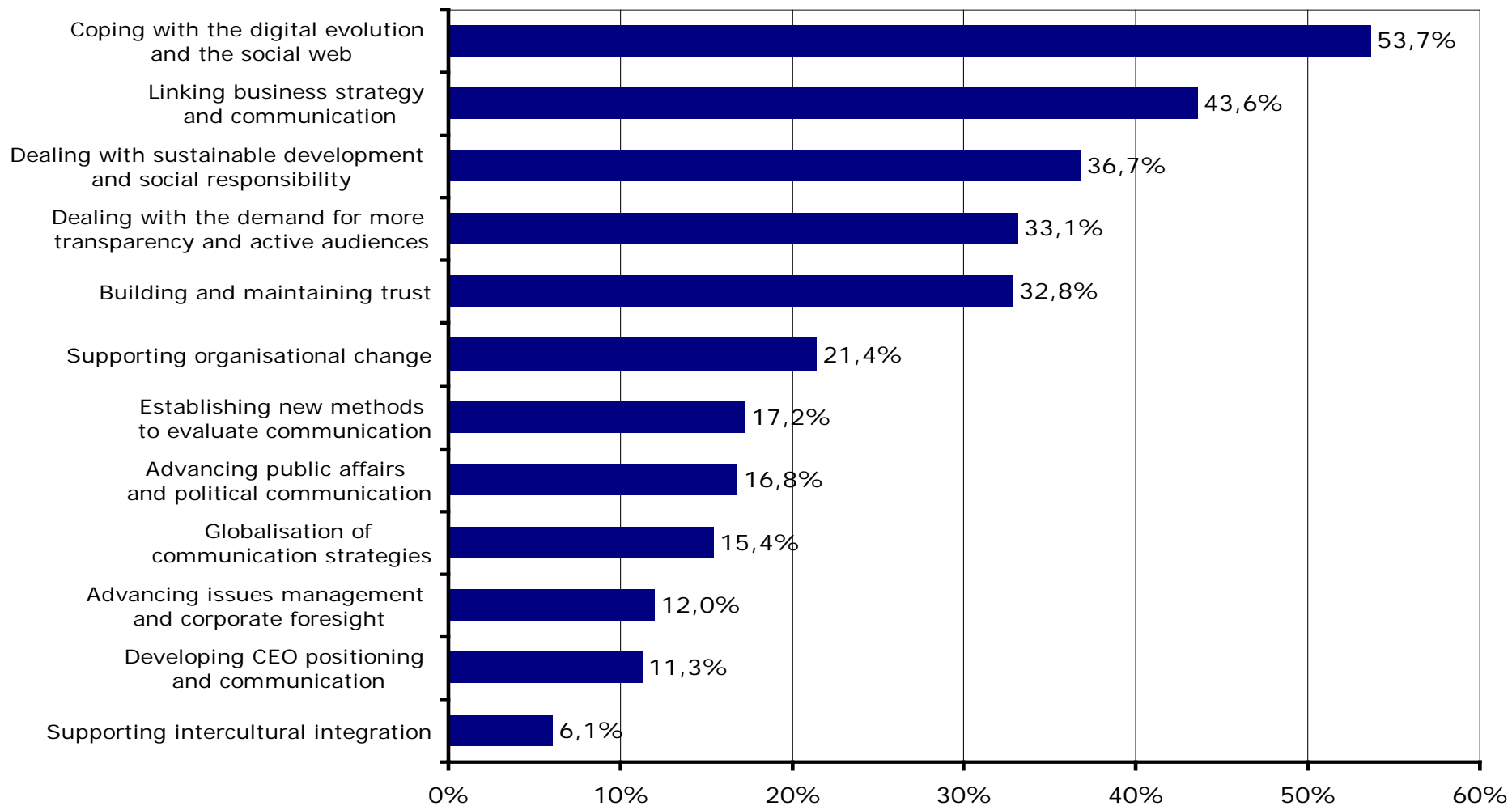


Communication strategy  
and planning

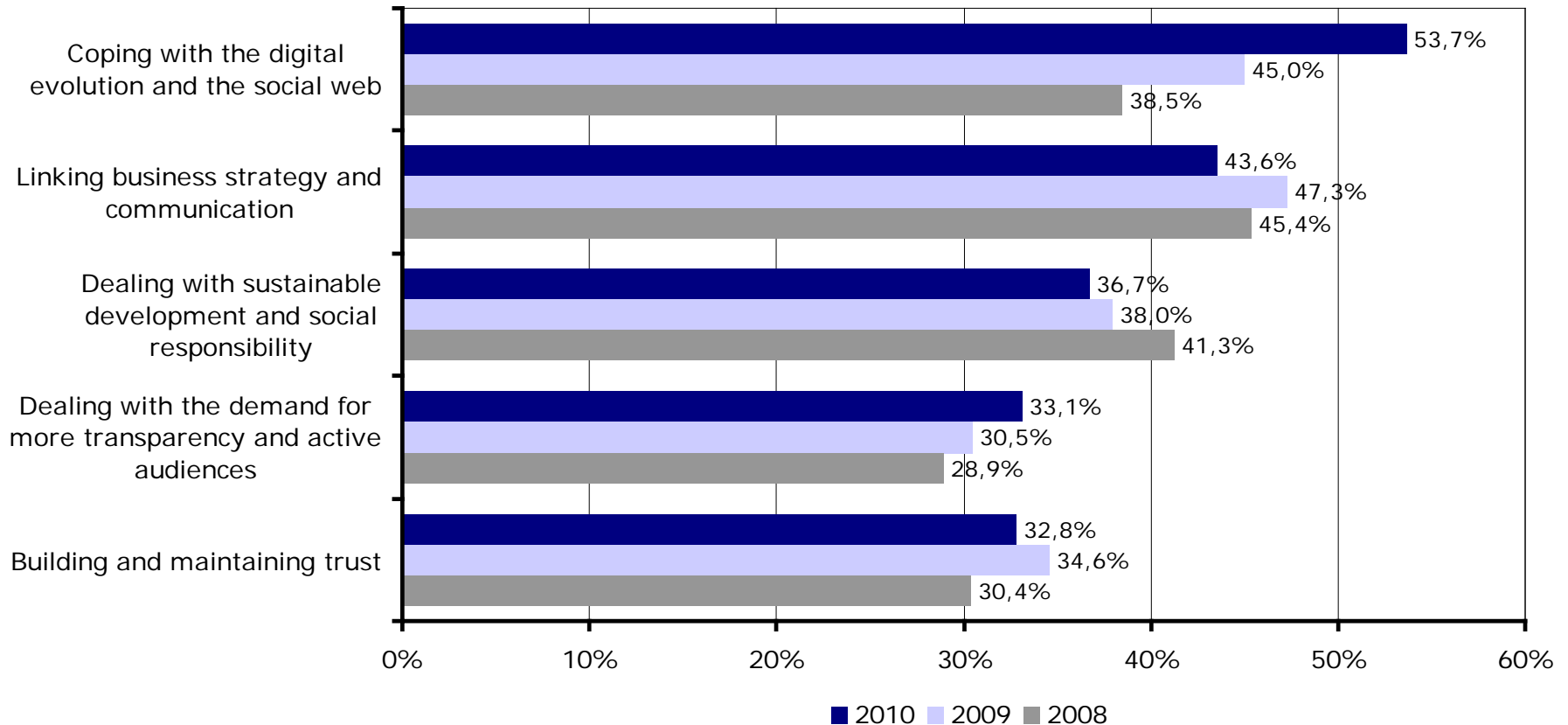
## Challenges for communication management in Europe

Most important issues within the next three years		
1	Coping with the digital evolution and the social web	53.7%
2	Linking business strategy and communication	43.6%
3	Dealing with sustainable development and social responsibility	36.7%
4	Dealing with the demand of new transparency and active audiences	33.1%
5	Building and maintaining trust	32.8%

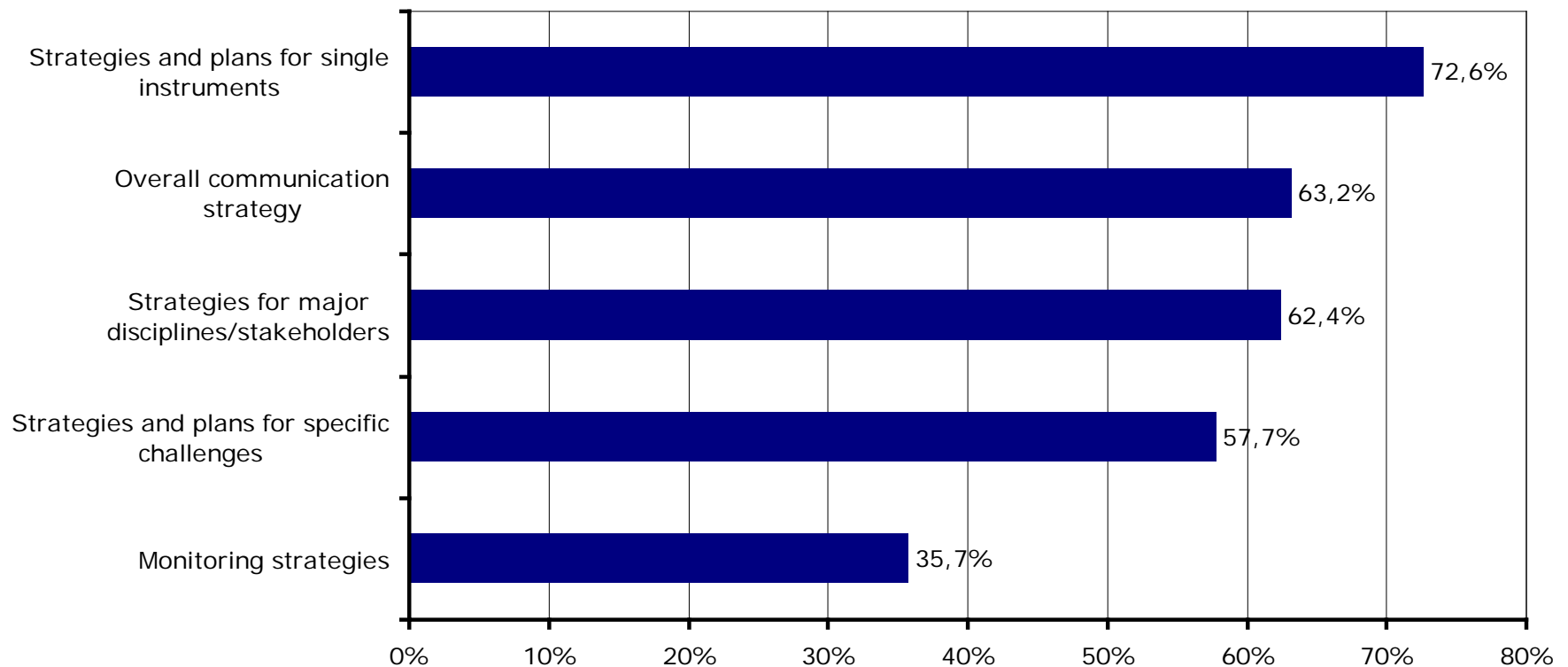
## The most important issues until 2013 in detail



## Relevance of strategic issues compared to previous surveys



## Planning procedures: Many PR professionals plan on the instrumental level, neglecting advanced methods and monitoring



## Communication planning in different organisations

	Joint stock	Private	Governmental	Non-profit	Overall
Strategies and plans for single instruments	74.9%	72.6%	69.1%	76.5%	72.6%
Overall communication strategy	66.4%	68.6%	63.9%	65.5%	63.2%
Strategies for major disciplines/ stakeholders	72.7%	62.4%	54.8%	55.3%	62.4%
Strategies and plans for specific challenges	65.9%	51.7%	57.0%	49.6%	57.7%
Monitoring strategies	40.2%	32.1%	28.2%	34.5%	35.7%

## Communication planning in European regions

	Northern Europe	Western Europe	Southern Europe	Eastern Europe	Overall
Strategies and plans for single instruments	74.8%	75.5%	68.2%	67.9%	72.6%
Overall communication strategy	72.1%	61.5%	54.8%	64.3%	63.2%
Strategies for major disciplines/ stakeholders	66.8%	64.2%	55.0%	62.4%	62.4%
Strategies and plans for specific challenges	66.4%	55.2%	50.9%	58.8%	57.7%
Monitoring strategies	35.0%	33.5%	37.3%	40.7%	35.7%

## Interpretation

### Priorities for communication management in Europe

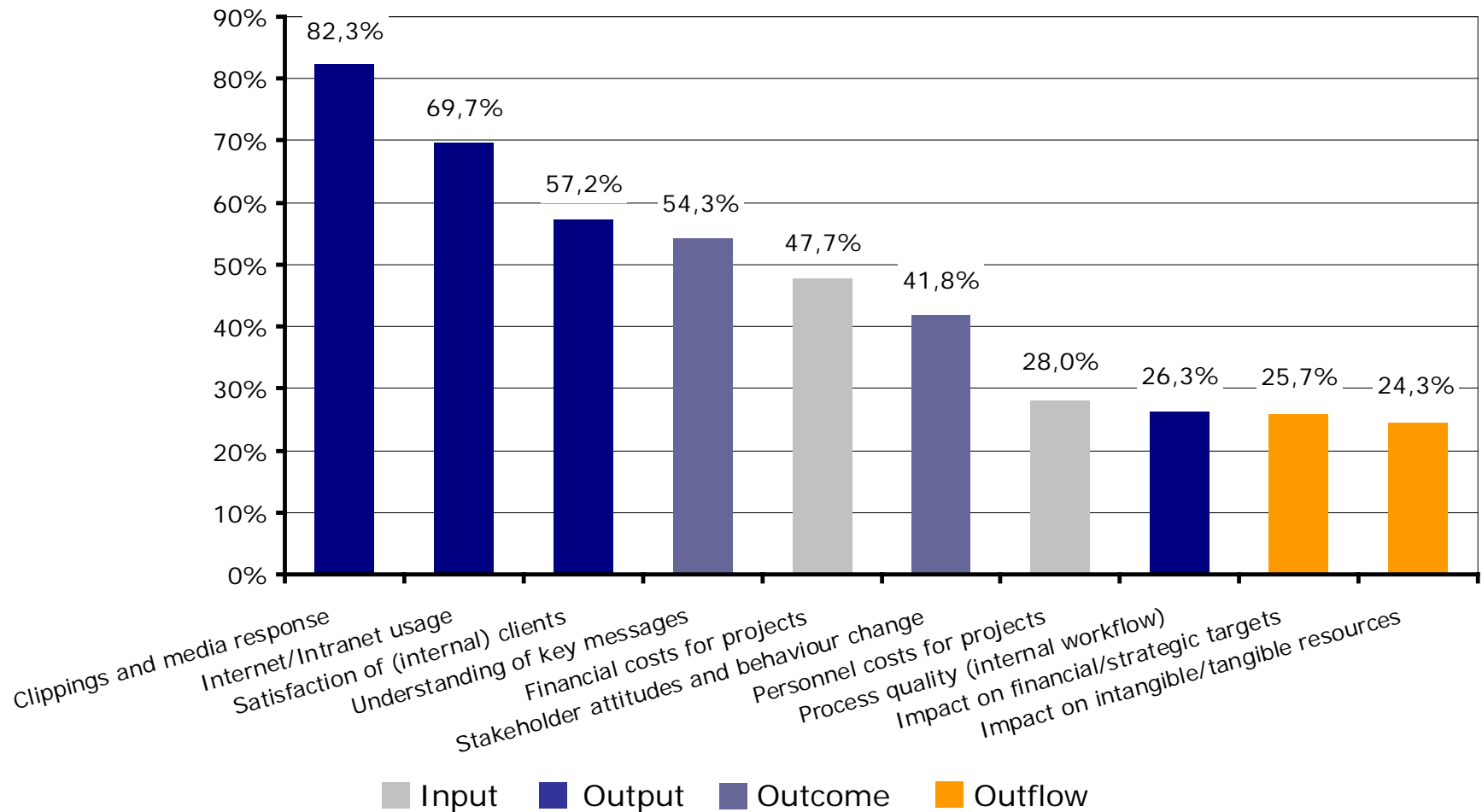
- \_ The survey identifies two main issues of major importance for communication professionals throughout Europe. Half of the respondents state either that coping with the digital evolution and the social web and/or linking business strategy and communication are most relevant for themselves within the near future. The digital topic has overtaken the business link issue which had been the number one issue for the past three years.
- \_ Social responsibility and sustainable development as well as building and maintaining trust are still important, but both have slightly lost significance, whereas dealing with the demand of new transparency and active audiences has gained since 2009.
- \_ Many PR professionals plan on the instrumental level, mostly for single instruments, overall communication strategies and for major disciplines and stakeholders. Monitoring is not done continuously. In line with the mainstream focus of communication management on speaking instead of listening, only one third of respondents has developed monitoring strategies.



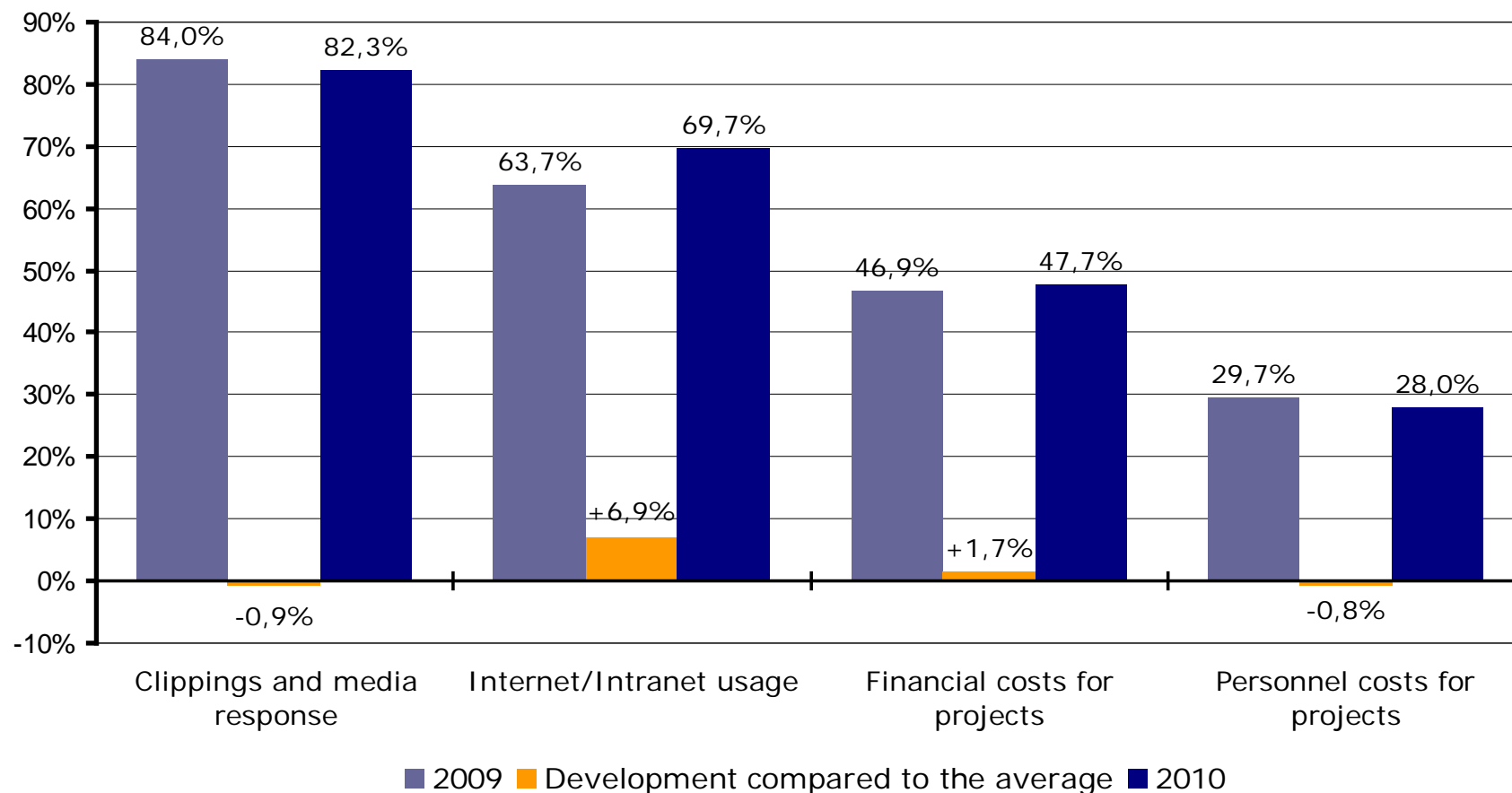


Evaluation and  
communication performance

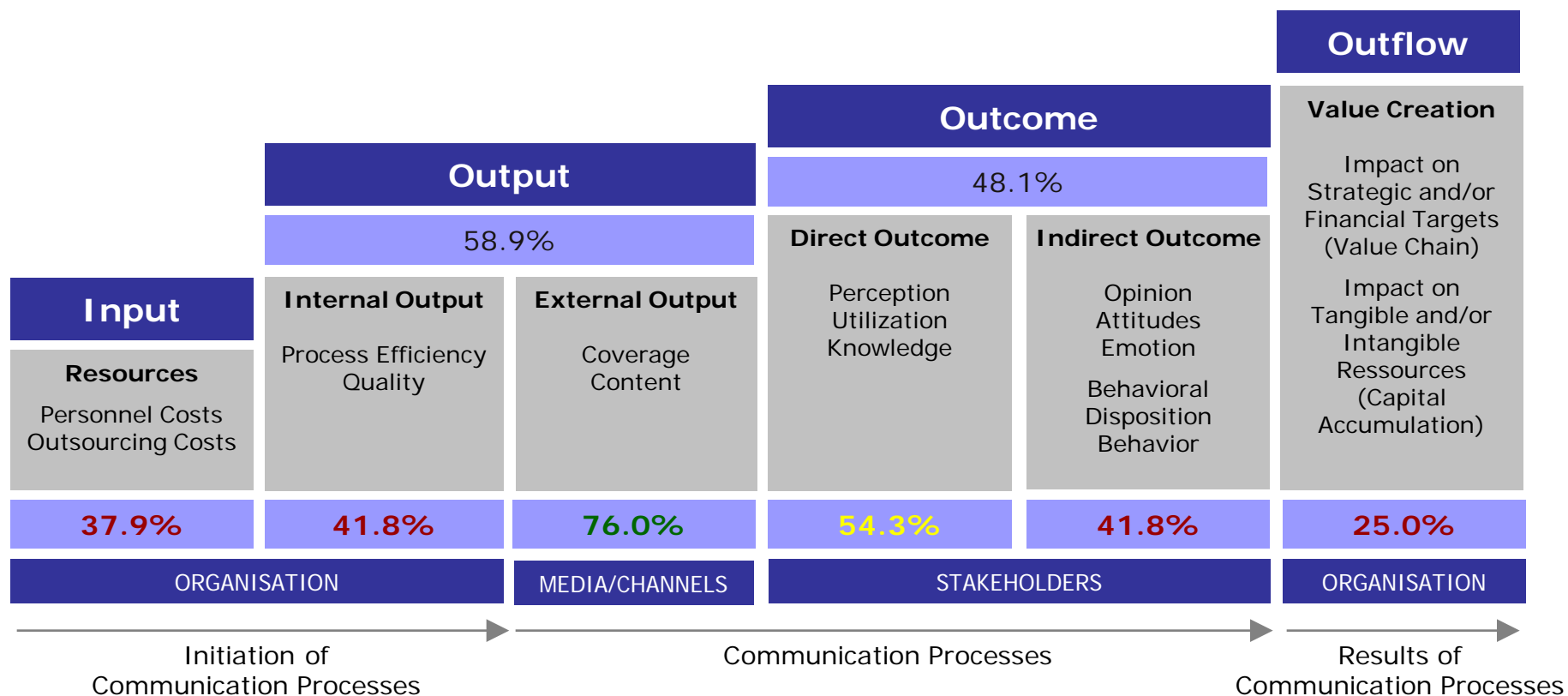
## How PR professionals in Europe measure their activities



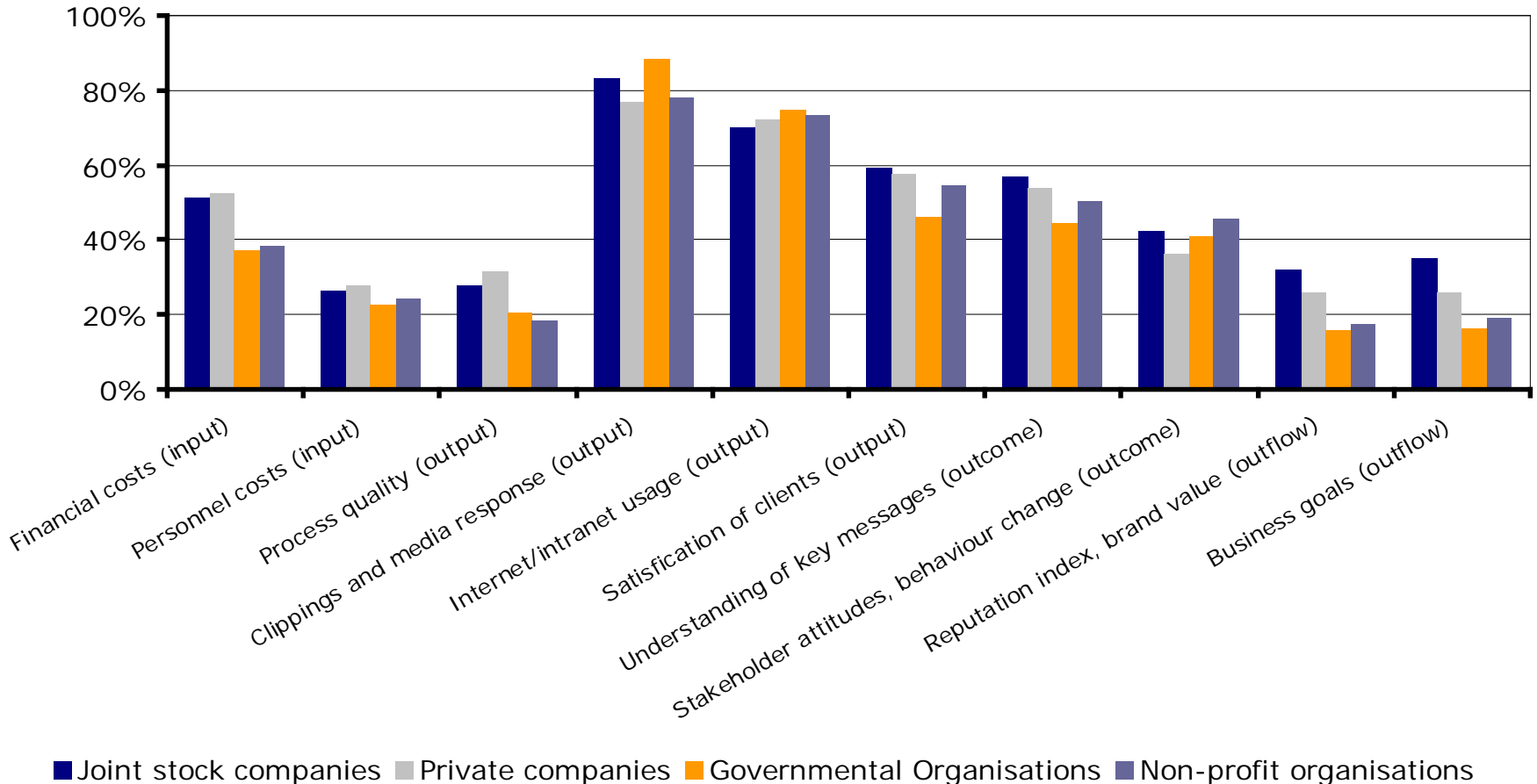
## Development of selected measurement methods



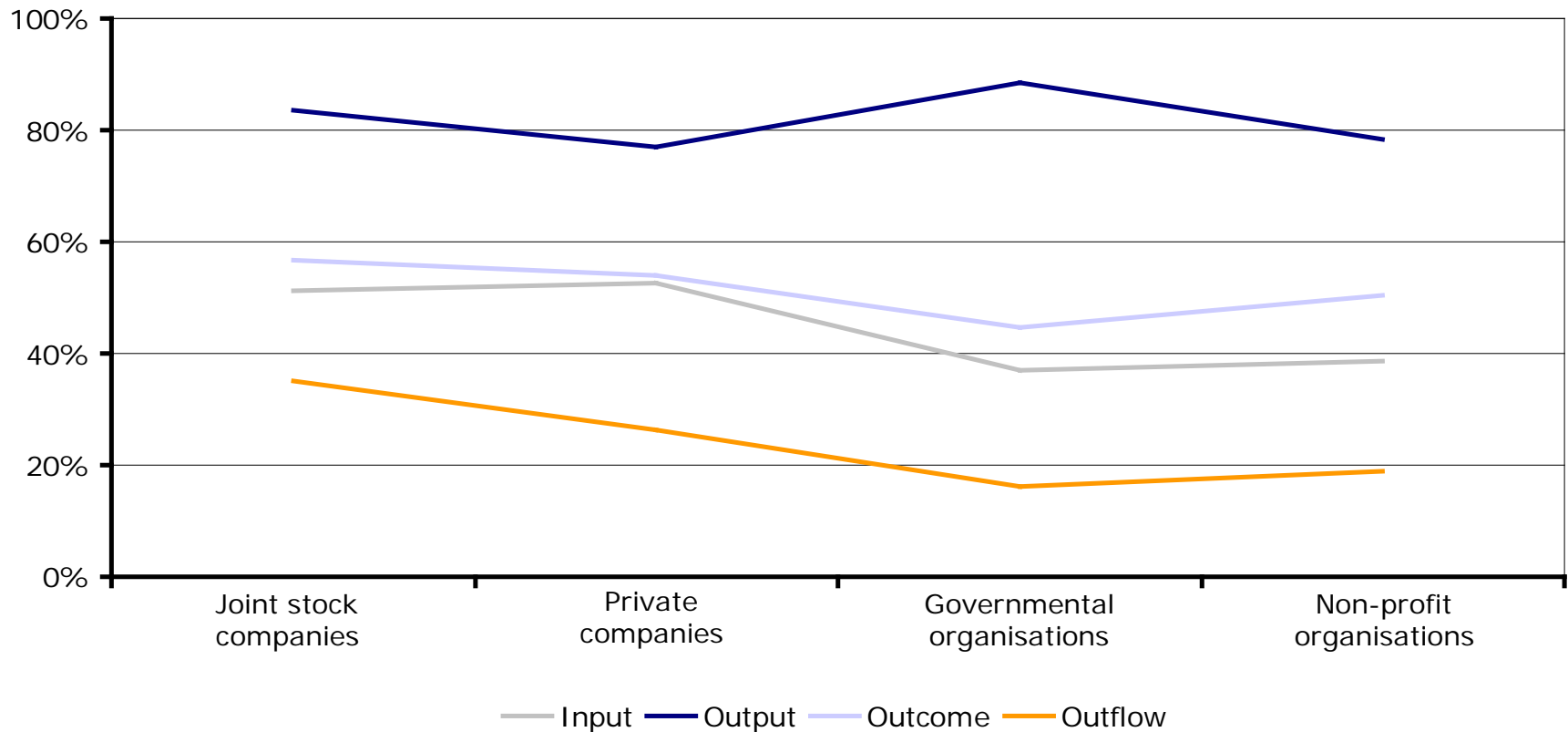
When measuring their activities, communication professionals focus only on a small part of the overall process



## Joint stock and private companies are forerunners in monitoring financial inputs and business impacts



## Communication measurement in different organisations



## Evaluation methods used in different organisations (details)

	Joint stock	Private	Governmental	Non-profit	Overall
Financial costs for projects	51.3%	52.6%	37.0%	38.5%	47.7%
Personnel costs for projects	26.4%	27.9%	22.7%	24.3%	28.0%
Process quality	27.8%	31.7%	20.6%	18.6%	26.3%
Clippings and media response	83.5%	76.9%	88.5%	78.3%	82.3%
Internet/intranet usage	70.0%	72.4%	74.8%	73.5%	69.7%
Satisfaction of (internal) clients	59.4%	57.9%	46.4%	54.9%	57.2%
Understanding of key messages	56.7%	54.0%	44.5%	50.4%	54.3%
Stakeholder attitudes, behaviour change	42.2%	36.4%	41.2%	45.6%	41.8%
Impact on intangible/tangible resources	32.1%	26.2%	15.8%	17.7%	24.3%
Impact on financial/strategic targets	35.2%	26.0%	16.1%	19.0%	25.7%

## Interpretation

### **Narrow view on communication controlling and measurement**

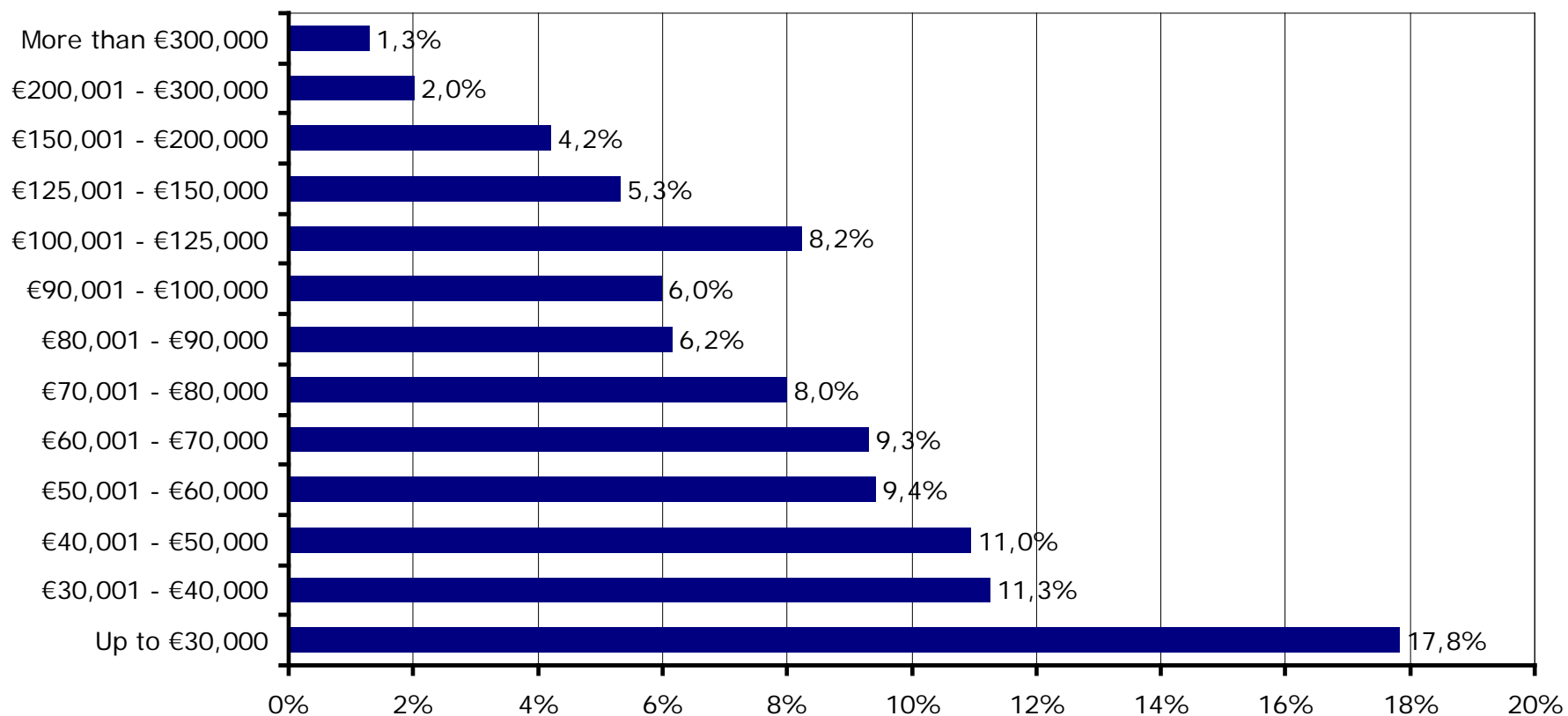
- \_ In accordance with last year's survey, communication managers in Europe mainly rely on monitoring clippings and media response (82%) and internet/intranet usage (70%) when evaluating their activities. Only one fourth is tracking impact on financial/strategic targets or on intangible/tangible resources. Taking into account that self-reporting in this much-discussed area tends to be rather optimistic, this is a strong hint that measurement practice is far behind the ideal.
- \_ In spite of the economic recession, the percentage of respondents monitoring financial costs has only risen slightly by 1.7%. The practice of monitoring personnel costs for projects has even declined marginally.
- \_ When compared with the framework for communication measurement issued by PR associations and controller associations (Zerfass 2010), a predominance of external output evaluation is obvious, followed by exploring the direct outcome on stakeholder's perception or knowledge. Measures that catch the far ends of the overall process, i.e. evaluating the input invested by the organisation and value creation that pays off for the organisation, are utilised at a significantly lower rate.
- \_ The narrow view and the lack of measures on the outflow level is coherent with the strong search for clear links between communication and organisational goals identified in this survey.



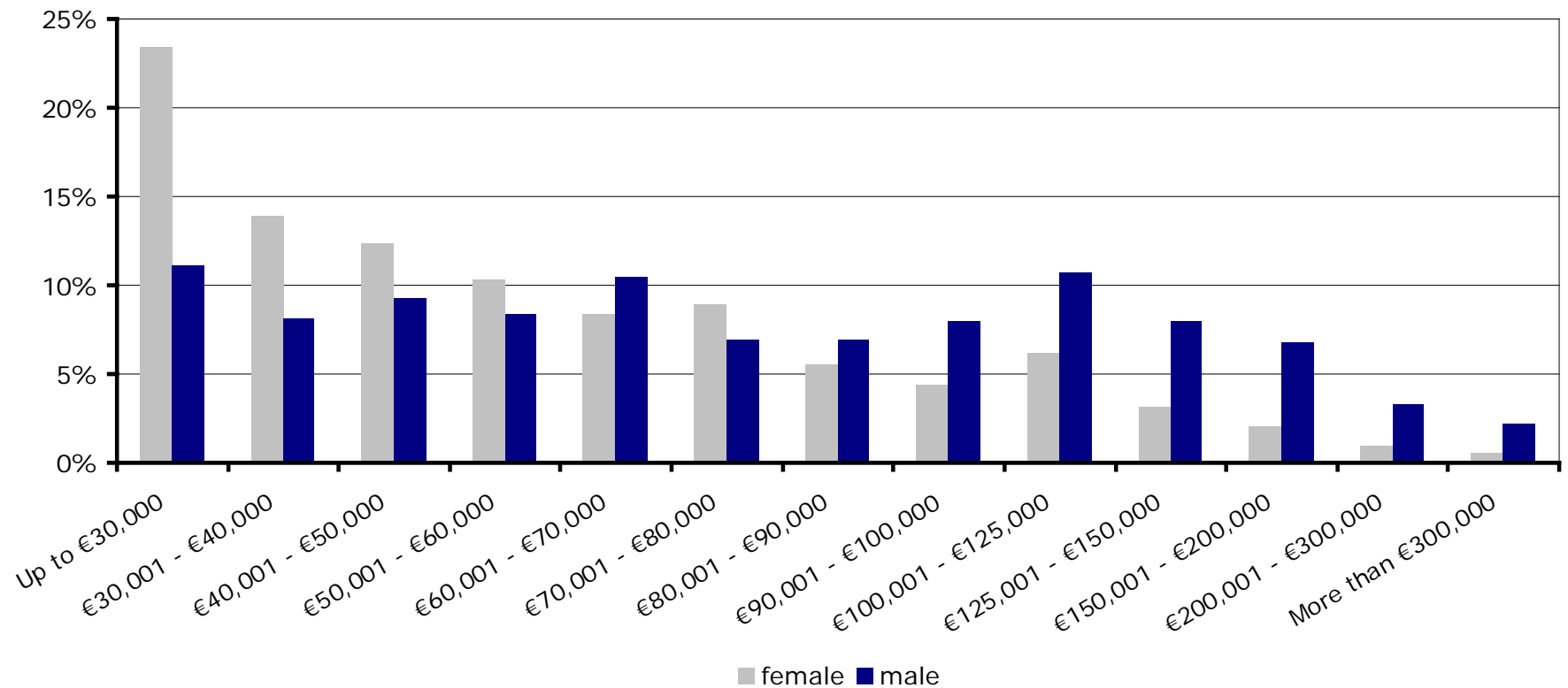


Salaries

## Basic annual salary of European PR practitioners (in Euros)



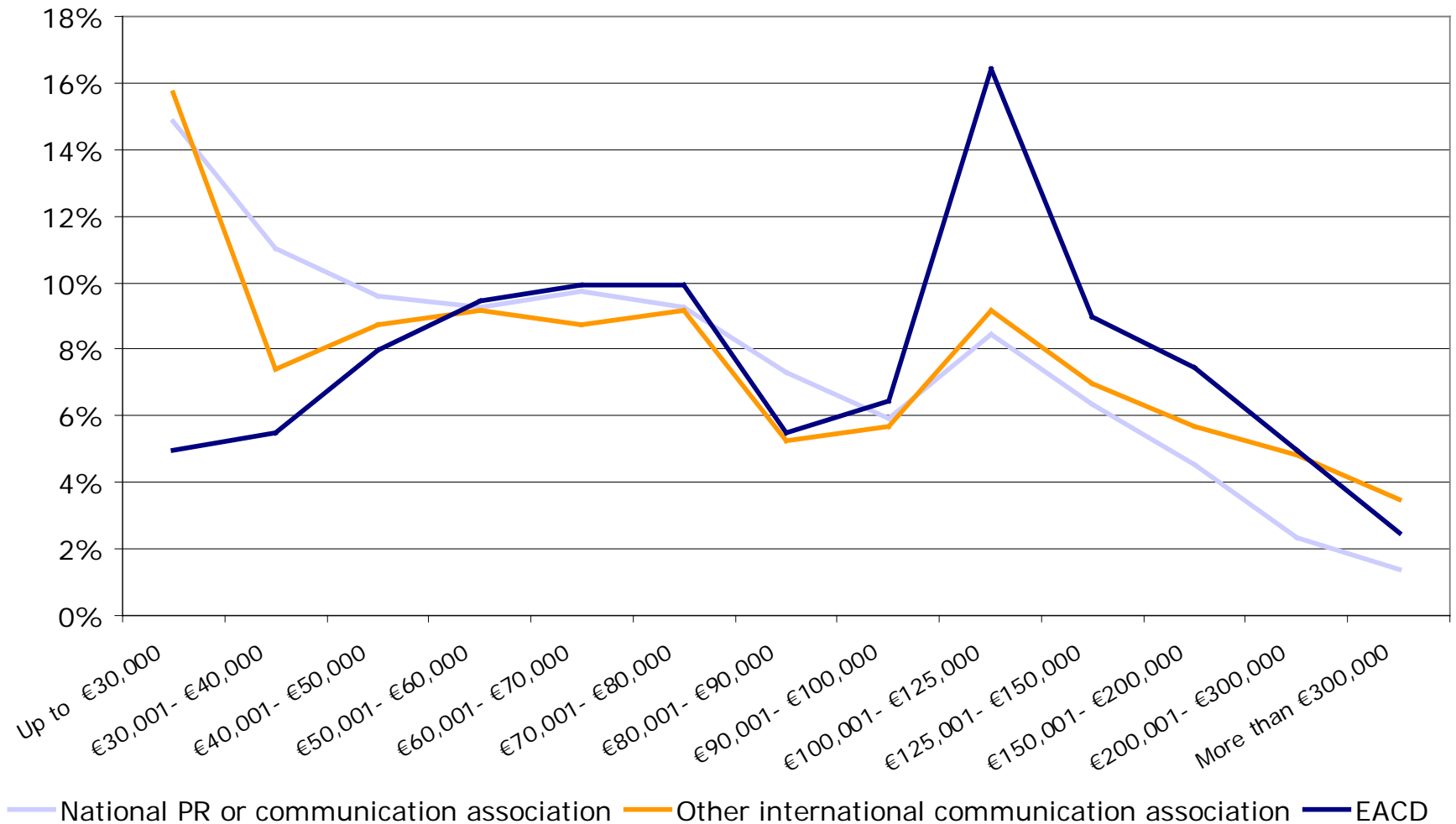
## Annual salaries of female and male PR practitioners



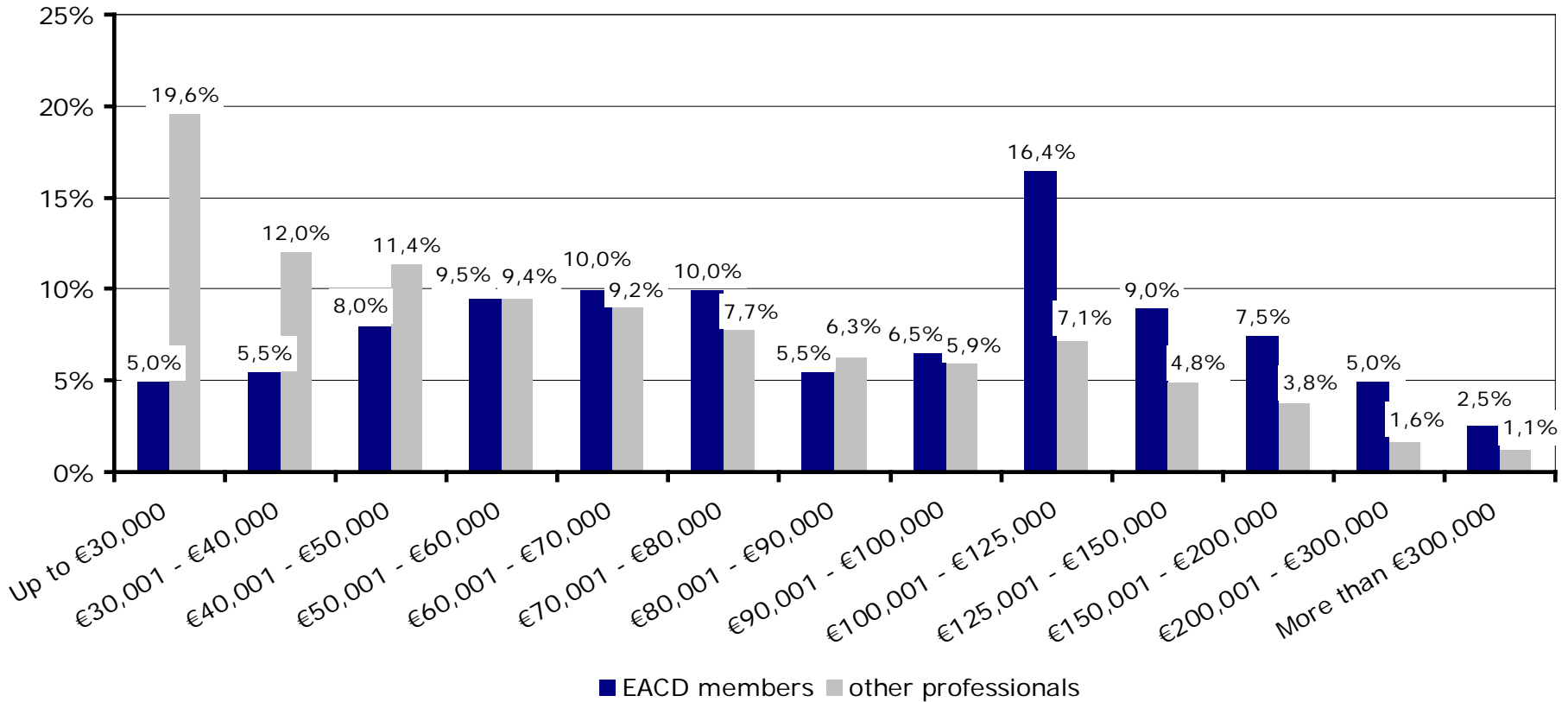
## Annual salaries of women and men in different hierarchical positions

	Average salary (Median)	
	Female	Male
Head of Communication, Agency CEO	€60,001 - €70,000	€90,001 - €100,000
Unit Leader	€40,001 - €50,000	€60,001 - €70,000
Team member	€30,001 - €40,000	€40,001 - €50,000

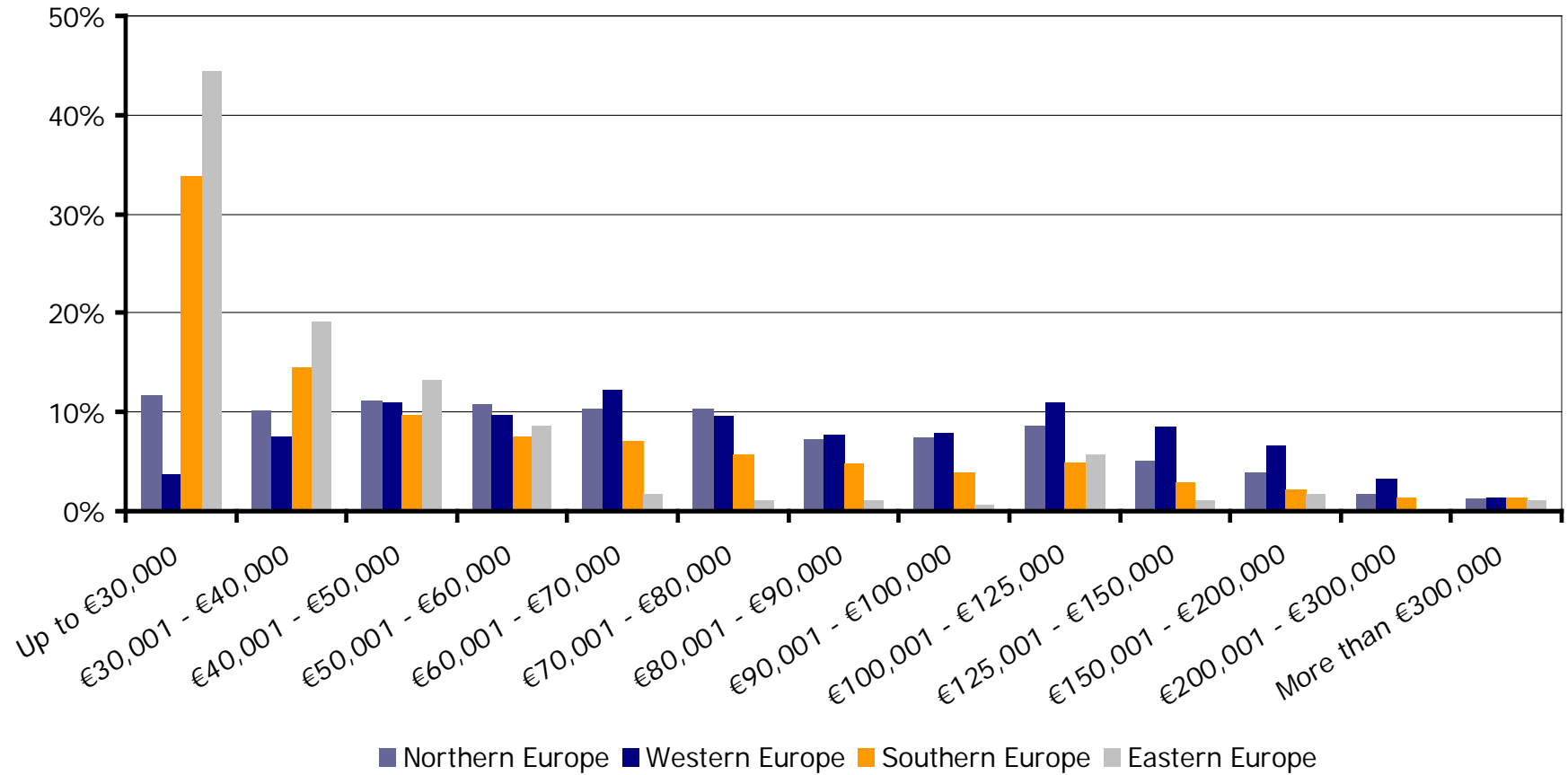
## Annual salary and membership by communication association



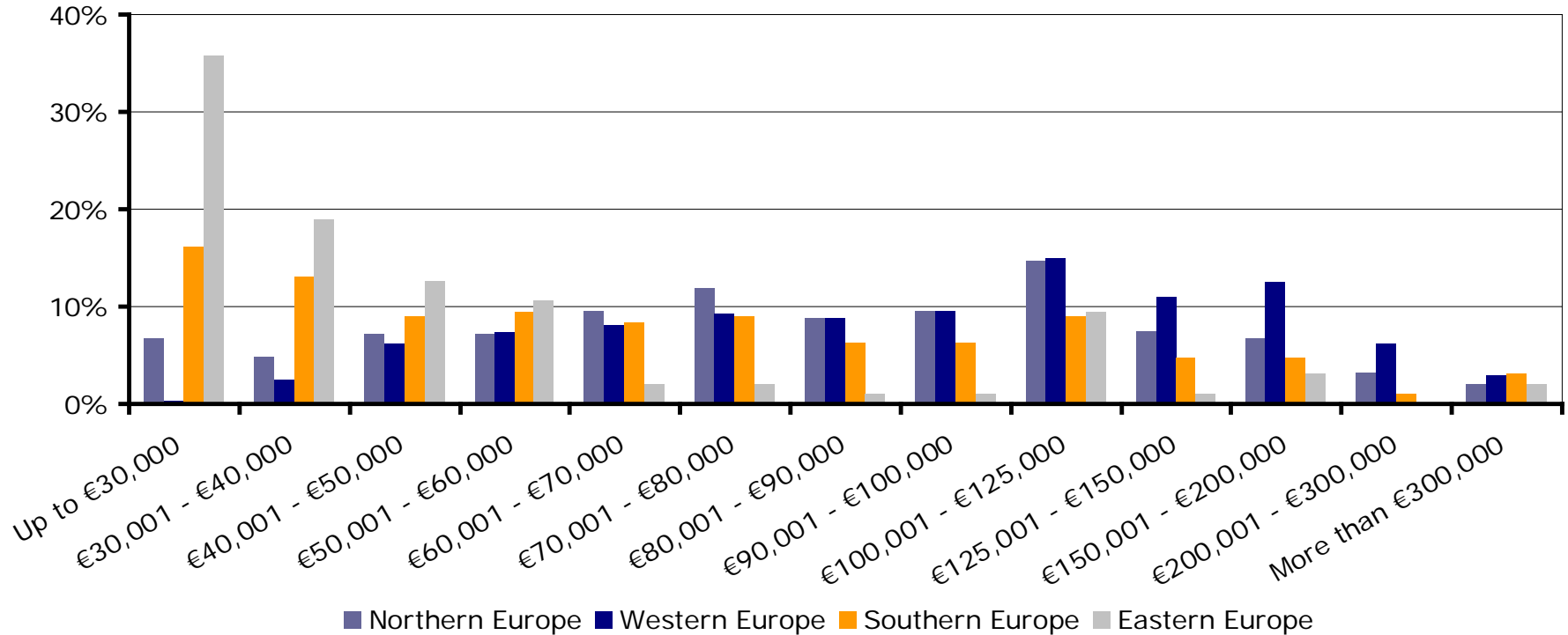
## EACD members: 40.4% will earn more than 100,000 Euros in 2010



## Most professionals in Eastern and Southern Europe earn less than 40,000 Euros annually

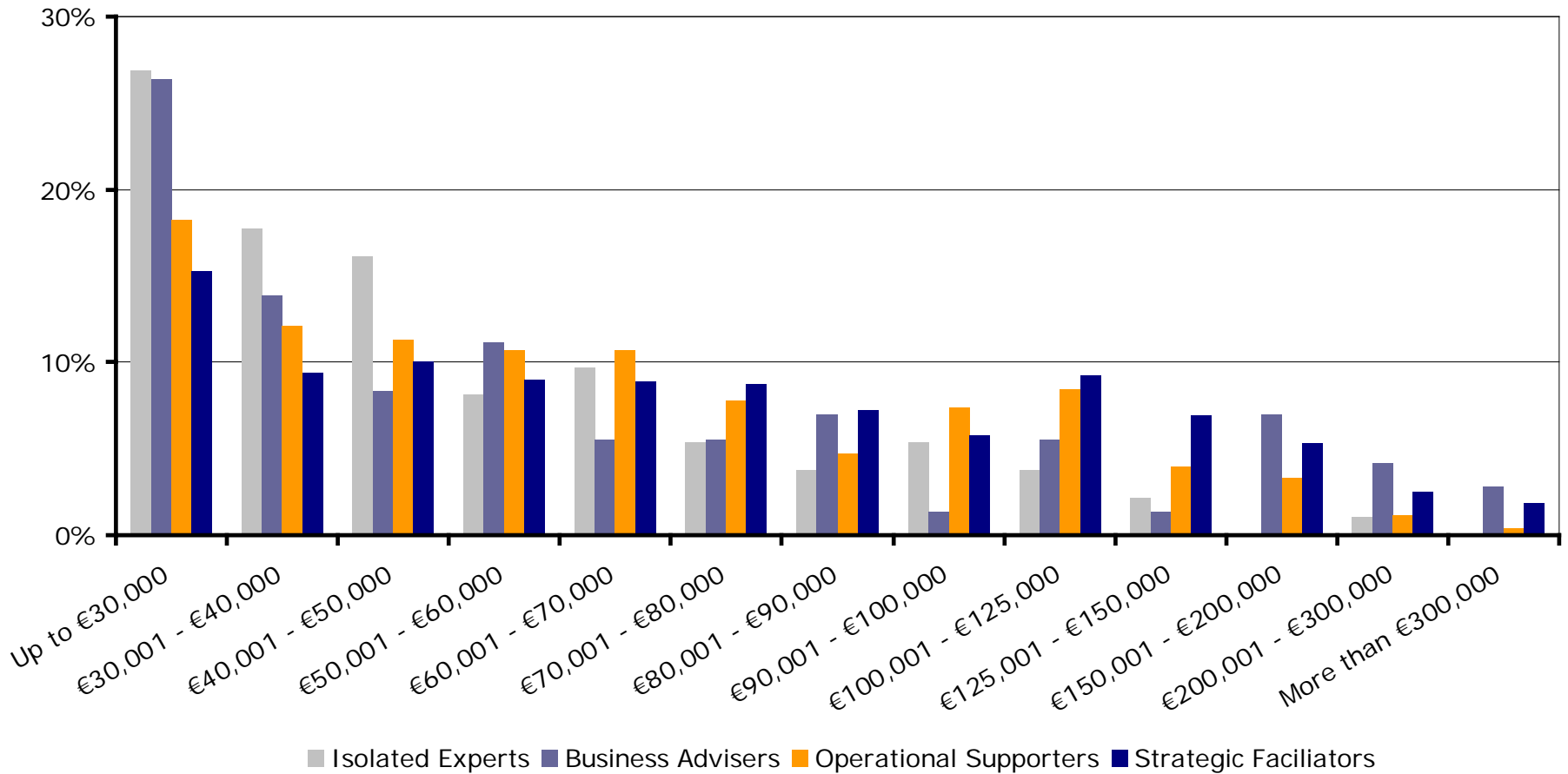


## Annual salary of top-level communicators in different regions (Head of communication, Agency CEO)





## Professionals enacting the roles of strategic facilitators and business advisers report a higher salary



## Interpretation

### **Salaries have dropped since last year and differ widely throughout Europe**

- \_ Compared to last year's survey (Zerfass et al. 2009), the percentage of respondents reporting high incomes above 100,000 Euros has declined. At the same time, 18% say they earn not more than 30,000 Euros per year.
- \_ These results may be partly influenced by the fact that the regional background of participants is better balanced than in previous surveys; this report is based on a rising number of questionnaires from Southern and Eastern European countries with a lower level of income. However, the overall trend is obvious.
- \_ Salaries of communication professionals differ widely throughout Europe. Countries with a well-established occupational field in Western and Northern Europe lead the field. At the same time, the average salary (median) of women is lower than the income of their male counterparts on every hierarchical level. The glass ceiling still exists.
- \_ Professionals enacting the „strategic facilitator“ and „business adviser“ roles tend to be in the top of the salary ranks, whereas a large portion of the „isolated experts“ are badly paid.



Annex

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