EUROPEAN COMMUNICATION MONITOR 2021

COMMTECH AND DIGITAL INFRASTRUCTURE, VIDEO-CONFERENCING, AND FUTURE ROLES FOR COMMUNICATION PROFESSIONALS.
RESULTS OF A SURVEY IN 46 COUNTRIES.

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COMMTECH AND DIGITAL INFRASTRUCTURE, VIDEO-CONFERENCING,
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RESULTS OF A SURVEY IN 46 COUNTRIES.

Ansgar Zerfass, Alexander Buhmann, Ralph Tench, Dejan Verčič & Ángeles Moreno

A study conducted by the European Public Relations Education and Research Association (EUPRERA)
and the European Association of Communication Directors (EACD), supported by Cision Insights and Fink & Fuchs.

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Contact:

Please contact national EUPRERA researchers at universities in your country listed on page 104 or lead researcher Professor Dr. Ansgar Zerfass at zerfass@uni-leipzig.de, if you are interested in presentations, workshops, interviews, or further analyses of the insights presented here.

Content

Foreword

These are truly challenging times for individuals, communities and companies across the world. The global pandemic has impacted daily lives everywhere and our crisis communications and digital skills are being implemented and improved along the way. The future is uncertain but for the short term, we are all embracing a virtual world, learning and finding new techniques to reach our customers, colleagues and our own networks and communities.

As world leaders reflect on how to rebuild our economies and safeguard a future, we, as individuals, are equally reflecting on how we want to live our lives. Strategic communication is key to crisis recovery as citizens look to world leaders and employees look to CEOs for reassurance, inspiration and hope. Our EACD community is collaborating, learning from each other and innovating to engage with the new future we face. If you're not already a member, I encourage you to join us!

Change is constant and communicators must be able to adapt as the world starts to transition from crisis to recovery. The digital transformation of communications helps to address these challenges. We need to strengthen our ability to integrate software into our workflows and use digital tools in our teams as well as for engaging stakeholders. At the same time, the big question arises whether established practices will come back after the pandemic – for instance, personal dialogues with stakeholders. Alternatively, video-conferencing might constitute a "new normal". And what does this mean for our roles as communicators, how can we create value for our organisations in a world shaped by technology? Change always comes with lots of opportunities. This edition of the European Communication Monitor (ECM) helps to reflect upon some of them.

I'm delighted to launch these results as they are ever more important in a changing landscape and to our community of European communicators. The EACD is a vibrant community that connects through virtual platforms to discuss such challenges: regional debates across Europe, working groups, and specific programmes for communication leaders and next-generation leaders. We are proud to present this report, a joint project with EUPRERA for more than a decade. I hope that you will enjoy digesting the insights and be able to apply them in your strategic communications going forward.

Kim Larsen

EVP, Head of Group Brand Marketing & Communications, Danske Bank
President, European Association of Communication Directors (EACD)

Introduction

Communication leaders across Europe are looking ahead to the time after the pandemic. Many industries and sectors of society have managed the challenges of uncertainty and lockdowns quite well. Others have experience tremendous problems. The same is true for our field. Internal communications and public affairs are rising in importance, due to the large number of employees working at home and to state subsidies for many sectors. Disciplines like event communication and sponsoring, to name only a few, suffer as budgets are shrinking or being reallocated.

What does this mean for the future? Without any doubt, the change of the profession will be accelerated. There will be neither a return to the old familiar nor a new normal that reflects today's practices. Instead, communications will be transformed by digitalisation on all levels and the pressing need to show its contribution to value creation. Communicators should be aware of key challenges. How can digital infrastructure and communication technology (CommTech) be implemented? What are, more specifically, future applications of video-conferencing for stakeholder communications – a technology that most of us use for collaboration almost every day right now? And how can communication practitioners contribute to organisational success by enacting new roles, if more and more aspects of information retrieval and stakeholders relations will be automated? These and other interesting topics are explored in the 15th edition of the European Communication Monitor.

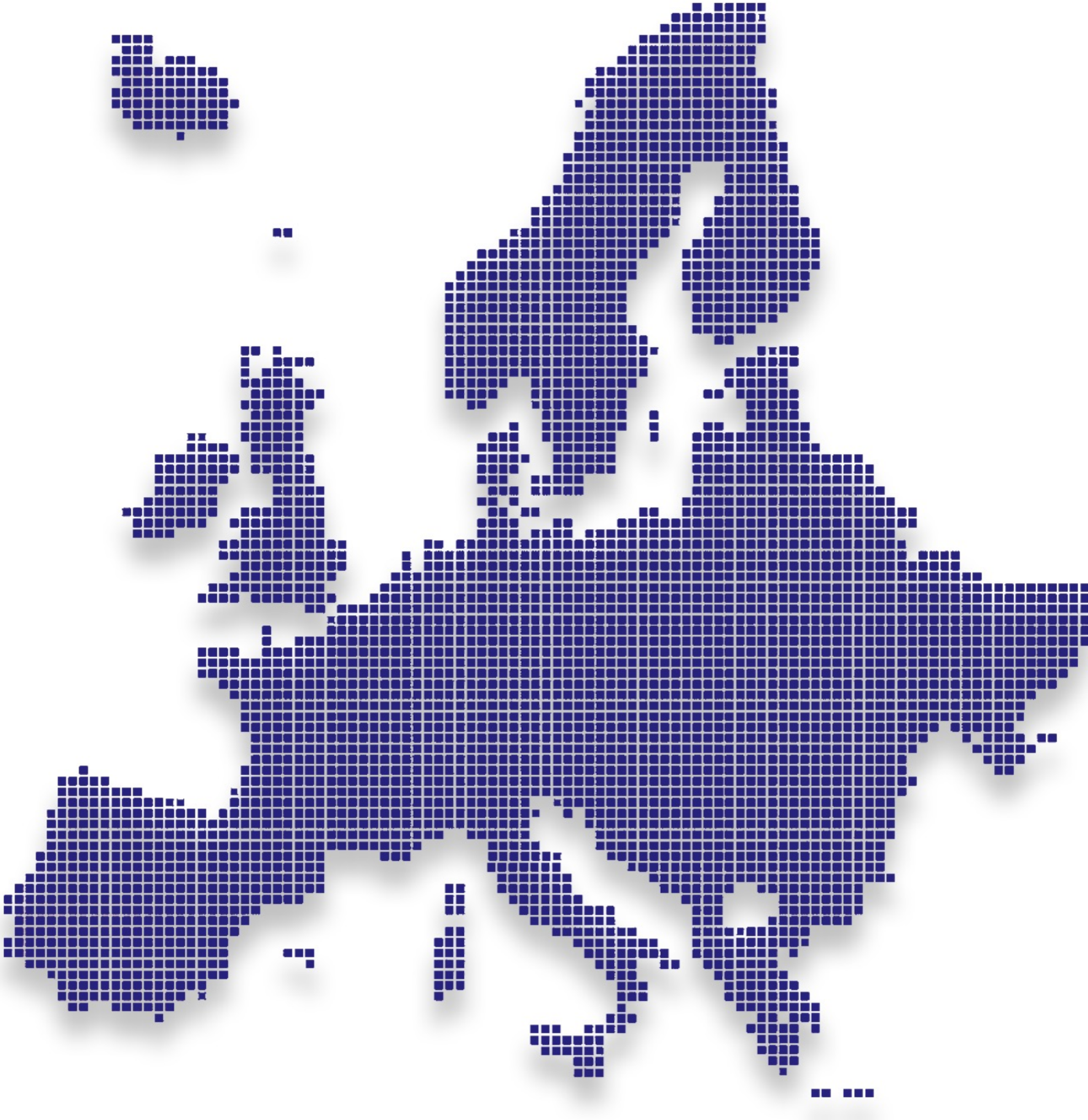
The study is based on responses from 2,664 communication professionals working in companies, non-profits, governmental organisations and agencies from 46 European countries. It provides additional detailed analyses for 22 countries, different types of organisations, and practitioners working in different disciplines. This research is the flagship study of the Global Communication Monitor series, the only truly global study of current practices and future trends in communication management worldwide.

On behalf of the research team, I would like to thank all professionals who participated in the survey. An extensive research project like this one is not possible without huge support. Many thanks to our premium partner Cision Insights, digital communications partner Fink & Fuchs, and regional partners #NORA in the Nordic countries and CECOMS in Italy. I am also grateful for our academic colleagues at renowned universities across Europe, who support in their countries as national collaborators. The same is true for EUPRERA, namely Virginia Villa, and EACD, namely Angela Howarth. The research team at Leipzig University, Jens Hagelstein and Ronny Fechner, did a tremendous job once again – thanks so much!

Prof. Dr. Ansgar Zerfass

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

Research design



Research design

The European Communication Monitor (ECM) 2021 is an academic study that explores practices and developments of professionally managed communications in companies, non-profits and other organisations including communication agencies across Europe. The study has been conducted annually since 2007. It is known as the largest comparative research project in the field of communication management, corporate communications, public relations and strategic communication worldwide. The ECM is complemented by similar surveys in North America, Latin America, and Asia-Pacific. Altogether, these studies form the Global Communication Monitor series initiated and coordinated by Professor Ansgar Zerfass from Leipzig University in Germany.

The ECM is organised by the European Public Relations Education and Research Association (EUPRERA) and the European Association of Communication Directors (EACD), supported by premium partner Cision Insights and Fink & Fuchs as digital communications partner. The Nordic Alliance for Communication & Management (#NORA) hosted by BI Norwegian Business School, Oslo, and the Center for Strategic Communication (CECOMS) at IULM University, Milan, support the project as regional partners. The study has been planned and conducted by a core research group of professors at renowned research universities across Europe: Ansgar Zerfass, Alexander Buhmann, Ralph Tench, Dejan Verčič and Ángeles Moreno. A wider board of professors and national research collaborators ensure that the survey reflects the diversity of the field and different country contexts.

The study follows academic standards of social science research. Concepts, definitions and instruments have been derived from the international body of knowledge, building on theories from various disciplines and previous empirical insights. A research framework (see page 12) has been developed that combines several independent and dependent variables: characteristics of communication professionals (demographics, education, job status, experience); features of the organisation; attributes of communication departments; the current situation regarding the professionals and their organisations; as well as perceptions on developments in the field. A quantitative online survey has been used to gather data (see page 11).

Four constructs are investigated in the ECM. Firstly, a number of current challenges linked to the digitalisation of strategic communication (Falkheimer & Heide, 2018; Nothhaft et al., 2019) and public relations (Tench & Waddington, 2021; Valentini, 2021) and changing roles for practitioners working in the field are explored. This includes practices of establishing digital infrastructure in communication departments and agencies, the use of video-conferencing for stakeholder communications, and internal tasks like coaching and advising top executives and middle managers. Secondly, national differences are revealed by breaking down the results to 22 key countries and to different types of organisations. Thirdly, statistical methods are used to identify high performing communication departments in the sample (Tench et al., 2017; Verčič & Zerfass, 2016). This makes it possible to unveil the difference between excellent and other units in terms of the challenges studied. Fourthly, developments and dynamics over times are identified by longitudinal comparisons of strategic issues and salaries. To this end, questions from previous ECM surveys (e.g. Zerfass et al., 2020) have been adapted. Overall, a vast range of evaluations are supported by the research design. This provides relevant insights for theory and practice.

Methodology and demographics

Methodology and demographics

The study used an online questionnaire that consisted of 37 questions in the English language. Each of them was based on the research framework (see page 12) and underpinned by a number of hypotheses. Most of the questions were mandatory and five of them were only presented to respondents working in communication departments, but not to those working in agencies. The survey instruments included dichotomous, nominal and ordinal response scales. The questionnaire was pre-tested with 64 communication professionals in 18 European countries in January 2021. Amendments were made where appropriate and the final questionnaire was activated for five weeks in February/March 2021. More than 15,000 professionals throughout Europe were invited with personal e-mails based on a database built by the research team over a decade. Additional invitations were sent via national research collaborators and professional associations.

The insights presented in this report are based on 2,664 responses from communication professionals working in communication departments and agencies across Europe. The sample has been strictly selected and qualified. Only fully completed questionnaires from participants who were clearly identified as part of the population were used. All others were deleted from the dataset. This is a distinct feature of this research. It sets the European Communication Monitor 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 difference becomes visible when comparing the share of overall and usable responses: in total 6,587 respondents started this survey; 3,574 of them completed it; and 2,664 were approved as being part of the population.

The high quality of the study is also underlined by the demographics of respondents. The majority are communication leaders with a solid qualification base and evidenced longevity of tenure in the field. 35.2 per cent hold a top hierarchical position as head of communication or as CEO of a communication consultancy; 26.3 per cent are unit leaders or in charge of a single communication discipline in an organisation. 69.8 per cent of the professionals interviewed have more than ten years of experience in communications. The vast majority (95.1 per cent) in the sample has an academic degree with more than two thirds holding a graduate degree or even a doctorate. The average age is 43.8 years. Seven out of ten respondents work in communication departments in organisations (joint stock companies, 16.1 per cent; private companies, 23.0 per cent; government-owned, public sector, political organisations, 22.4 per cent; non-profit organisations, associations, 10.9 per cent), while 27.6 per cent are communication consultants working freelance or for agencies. The communication professionals who participated in the survey work in 46 European countries (see page 15).

Data analysis was performed using the Statistical Package for the Social Sciences (SPSS). Regression analyses were applied to develop and test linear models predicting selected variables and effects. Results have been tested for statistical significance with, depending on the variable, Chi², ANOVA / Scheffé Post-hoc-Test, independent samples T-Test, Pearson correlation or Kendall rank correlation. The applied methods are reported in this report in the footnotes. Significant results and marked with asterisks in the figures and tables: * for significant ($p \leq 0.05$) and ** for highly significant ($p \leq 0.01$) results. Comparative insights were calculated on the micro level for practitioners working in different disciplines or roles, on the meso level for different types of organisations, and on the macro level for 22 key countries.

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Research framework and questions

Person (Communication professional)

Demographics	Education	Job status	Professional status
Age & Gender, Q 28, Q 29 Income, Q 37	Academic qualification, Q 31 Specialised training, Q 32	Position, Q 21 Practices (Areas of work), Q 27	Experience on the job (years), Q 30 Membership in professional association(s), Q 35

Organisation

Structure / Culture	Country
Type of organisation, Q 20 Alignment of the top communication manager, Q 22	European country, Q 36

Communication department

Excellence

Influence	Performance
Advisory influence, Q 23 Executive influence, Q 24	Success, Q 25 Quality & Ability, Q 26

Situation

Digital needs for communications, Q 1

Digital maturity of the communication department/agency, Q 2

Strategies for digitalisation and digital infrastructure, Q 3

Video-conferencing for stakeholder communications, Q 4, Q 5

Roles of communication professionals, Q 15

Competencies for different roles, Q 16

Advising and coaching practices, Q 18

Targets of advisory activities, Q 19

Use of video-conferencing hardware and software, Q 33, Q 34

Perception

Video-conferencing after the pandemic, Q 6, Q 7, Q 8

Support and expectations for video-conferencing, Q 9, Q 10

Stakeholders' view on video-conferencing, Q 11, Q 12

Future of video-conferencing for communications, Q 13

Strategic issues for the profession, Q 14

Future importance of coaching and advising, Q 17

Demographic background of participants

Position

Head of communication, Agency CEO	35.2%
Unit leader, Team leader	26.3%
Team member, Consultant	29.7%
Other	8.7%

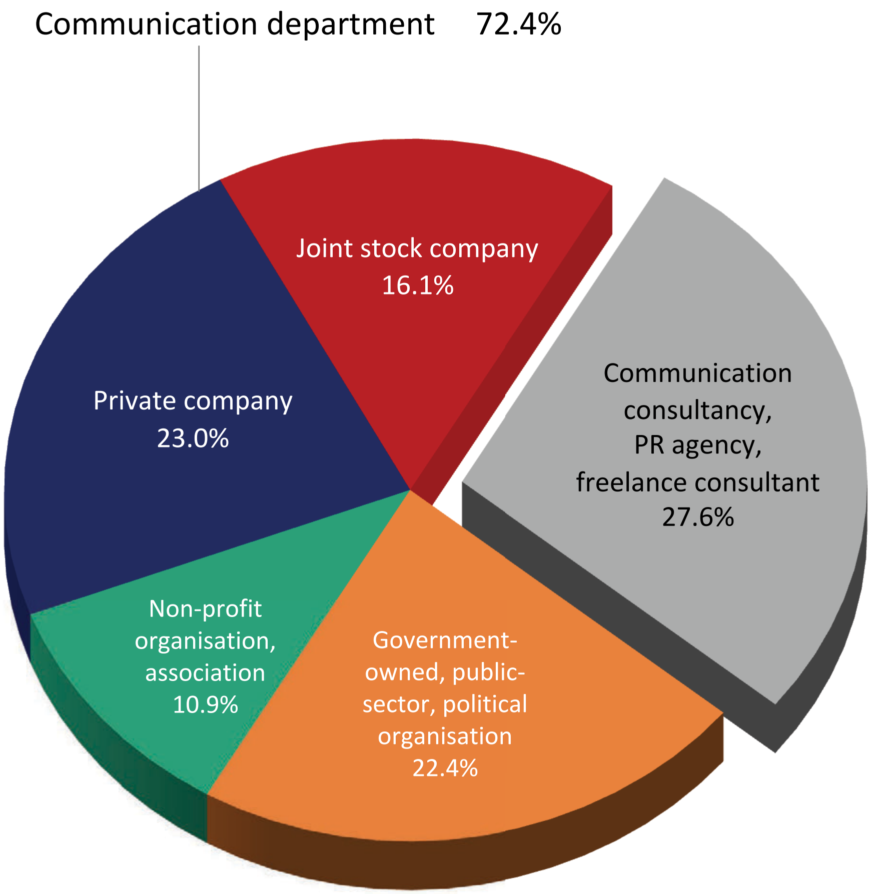
Job experience

More than 10 years	69.8%
6 to 10 years	14.5%
Up to 5 years	15.7%

Alignment of the communication function

Strongly aligned communication department	26.0%
Aligned communication department	60.1%
Weakly aligned communication department	13.8%

Organisation



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,664 communication professionals. Q 20: Where do you work? Q 21: What is your position? Q 30: How many years of experience do you have in communication management/PR? Alignment: n = 1,929 communication professionals working in communication departments. Q 22: Within your organisation, the top communication manager or chief communication officer is a member of the executive board / reports directly to the CEO or highest decision-maker on the executive board / does not report directly to the CEO or highest decision-maker.

Personal background of respondents

Gender / Age

	Overall	Head of communication, Agency CEO	Unit leader, Team leader	Team member, Consultant
Female	60.8%	52.8%	59.9%	69.7%
Male	39.2%	47.2%	40.1%	30.3%
Age (on average)	43.8 years	47.7 years	43.4 years	40.0 years

Membership in a professional association

European Association of Communication Directors (EACD)	6.4%
Other international communication association	12.2%
National PR or communication association	48.3%

Highest academic educational qualification

Doctorate (Ph.D., Dr.)	7.9%
Master (M.A., M.Sc., Mag., M.B.A.), Diploma	61.1%
Bachelor (B.A., B.Sc.)	26.1%
No academic degree	4.9%

www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 2,656 communication professionals. Q 21: What is your position? Q 28: How old are you? Q 29: What is your gender? Q 31: Please state the highest academic/educational qualification you hold. Q 35: Are you a member of a professional organisation?

Countries and regions represented in the study

Respondents are based in 46 European countries and four regions

Western Europe
26.1% (n = 694)

Austria, Belgium, France, Germany, Liechtenstein, Luxembourg, Netherlands, Switzerland

Northern Europe
23.8% (n = 635)

Denmark, Estonia, Finland, Iceland, Ireland, Latvia, Lithuania, Norway, Sweden, United Kingdom

Southern Europe
33.7% (n = 898)

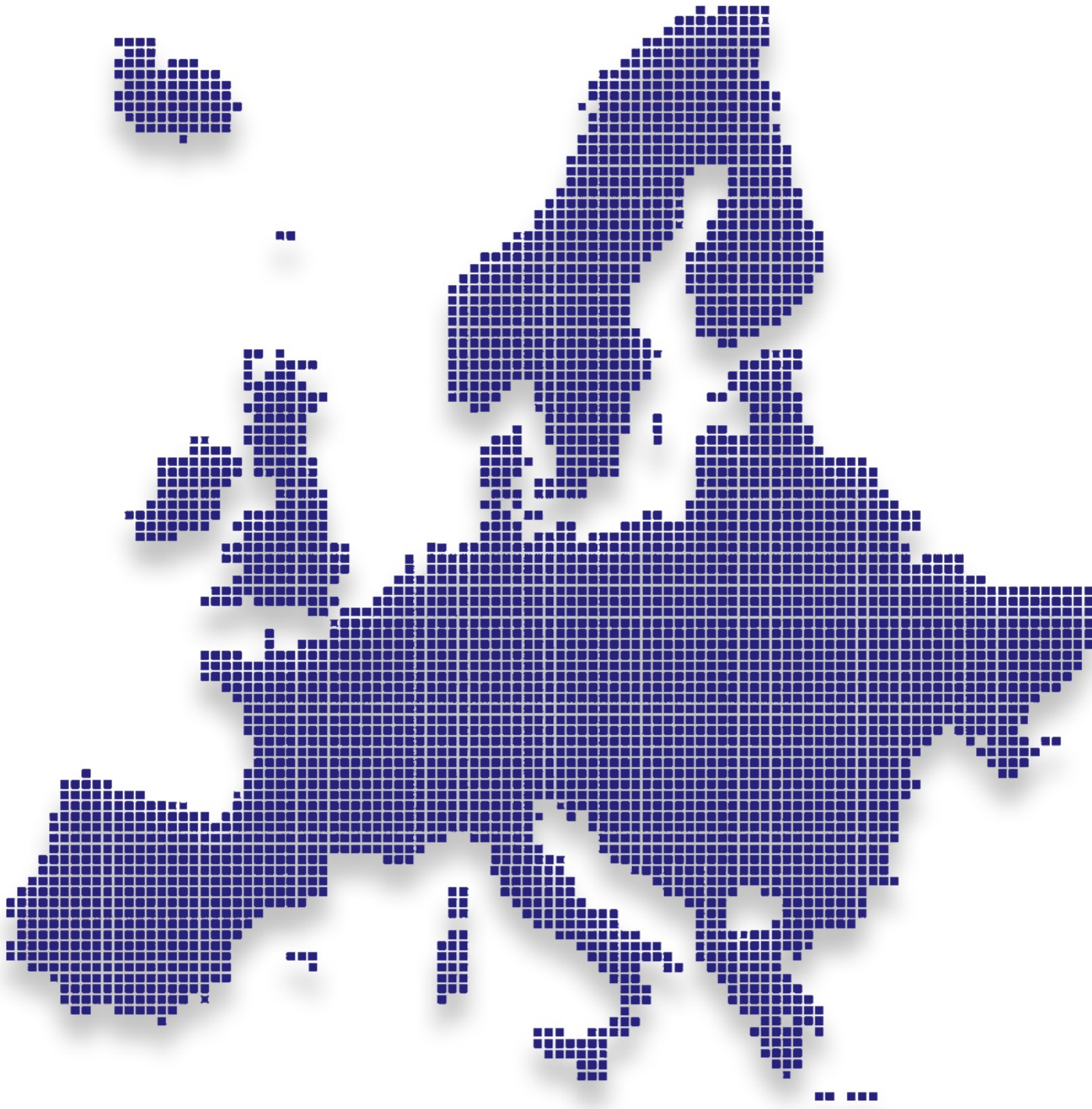
Albania, Andorra, Bosnia and Herzegovina, Croatia, Cyprus, Greece, Italy, Macedonia, Malta, Montenegro, Portugal, San Marino, Serbia, Slovenia, Spain, Turkey

Eastern Europe
16.4% (n = 437)

Armenia, Azerbaijan, Bulgaria, Czech Republic, Georgia, Hungary, Monaco, Poland, Romania, Russia, Slovakia, Ukraine

www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,664 communication professionals. Q 36: 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 (2021).

CommTech and digital infrastructure



CommTech and digital infrastructure

Recent technological developments and the Covid-19 pandemic have accelerated the digital transformation of communication departments and agencies. So far, the professional and academic debate has mainly focused on new media and channels provided by digital technologies, e.g. social media, intranet or websites (Duhé, 2017). The upcoming notion of *CommTech* (Communication Technology) has widened this by asking how digital technologies can modify communication processes along the whole stakeholder journey (e.g., Arthur W. Page Society, 2021; Weiner, 2021). Managing the digitalisation of communications efficiently requires the use of digital tools and technology on different layers: (a) digitalising communication processes with internal and external stakeholders; and (b) digitalising infrastructure, i.e. supporting internal workflows within a communication department or agency. The latter can be further differentiated in specific infrastructure for functional needs and in generic infrastructure that is relevant in any organisational subunit, e.g. equipment for mobile work at home or for video-conferencing (Bygstad, 2017; Constantinides et al., 2018; Zerfass & Brockhaus, 2021).

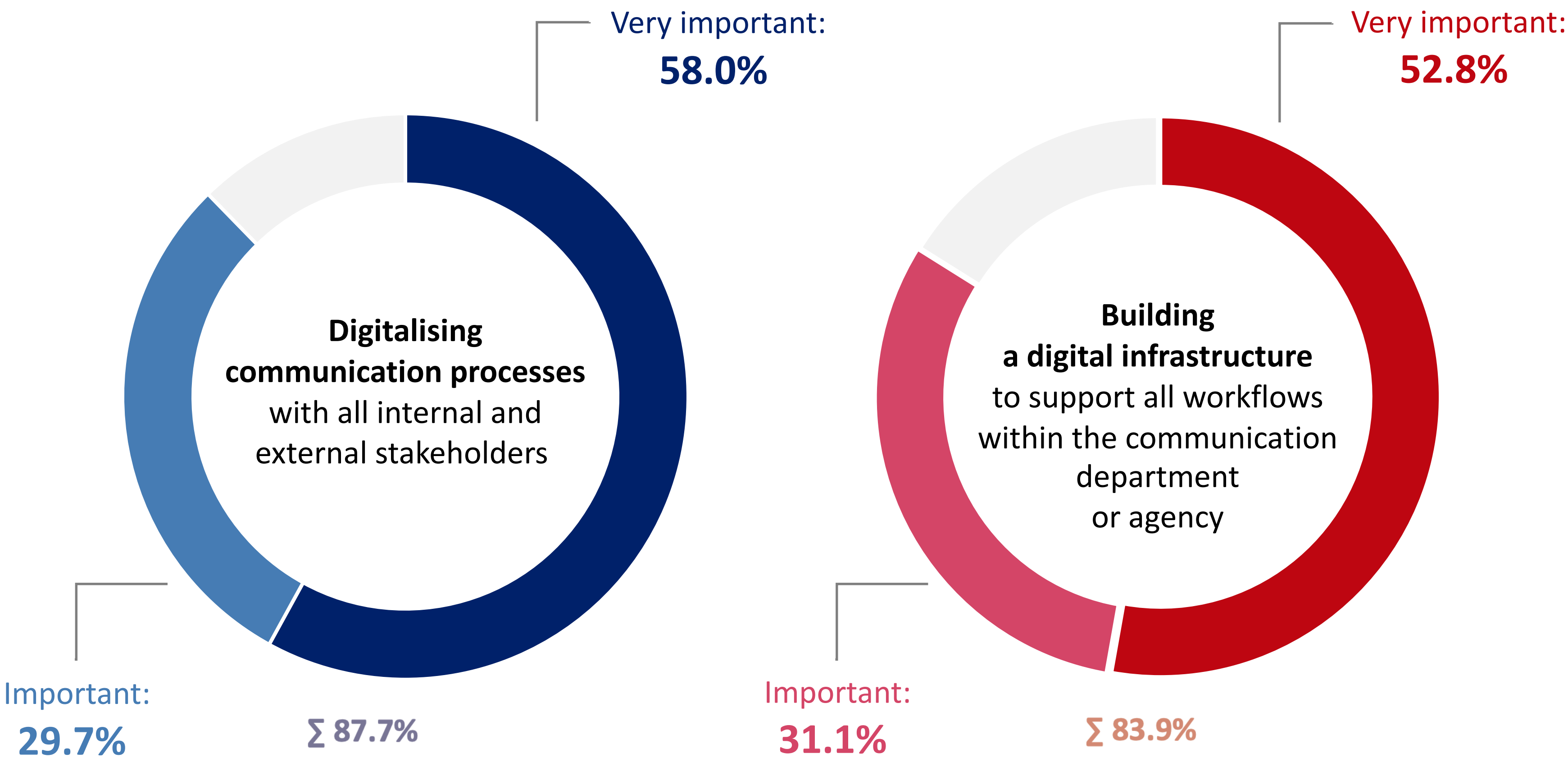
The results of this study show that introducing CommTech is a necessity and a huge challenge at the same time. A vast majority of practitioners across Europe highlight the importance of digitalising stakeholder communications (87.7%) and building a digital infrastructure to support internal workflows (83.9%). The need to improve workflows is comparatively higher in Southern and Eastern Europe. The current level of digital maturity, however, is often not satisfying. Three out of four communication departments and agencies are quite experienced in using external digital platforms for stakeholder communications and in providing collaboration platforms for their team members. But only a minority is considered mature when it comes to providing digital tools for support activities that are specific for communications like managing digital assets. Alarmingly, 39.2 per cent of practitioners across Europe describe their department or agency as immature in both digitalising stakeholder communications and building a digital infrastructure. Overall, digital maturity differs significantly across types of organisations: joint stock companies are clearly ahead and governmental organisations are lagging behind.

Strategies for digital transformation are crucial for mastering the future of communications. Currently, well developed approaches for digitalising one or more communication processes are reported for 60.0 per cent of the communication departments and agencies, while only 32.3 per cent have routines for selecting software and services. But digitalisation affects not only technical systems – social systems are relevant as well. In the end, digitalisation is a change process for organisations (Nadkarni & Prügl, 2021). Hence, communication departments and agencies need to take a socio-technical perspective (Bostrom & Heinen, 1977) and address several dimensions when going through a digital transformation. Our findings show: Strategies for transforming structure (42.1%) or people (41.9%) and especially for modifying tasks (39.4%) are less prevalent than approaches for using technology (48.3%). Statistical analyses with a regression model show that developing strategies for all dimensions helps to boost digital maturity.

Overall, companies and agencies are significantly ahead of governmental and non-profit organisations in developing strategies for digitalisation. Interestingly, practitioners working in marketing communications assess digital strategy development in their organisations more optimistically than their peers in other disciplines. This supports literature which reveals a more advanced debate on using technology in marketing under the umbrella term *MarTech* (e.g., Brinker, 2020; Chaffey & Smith, 2017; Doughty, 2019).

Digitalising stakeholder communications and internal workflows is a top priority for a large majority of communication departments and agencies across Europe

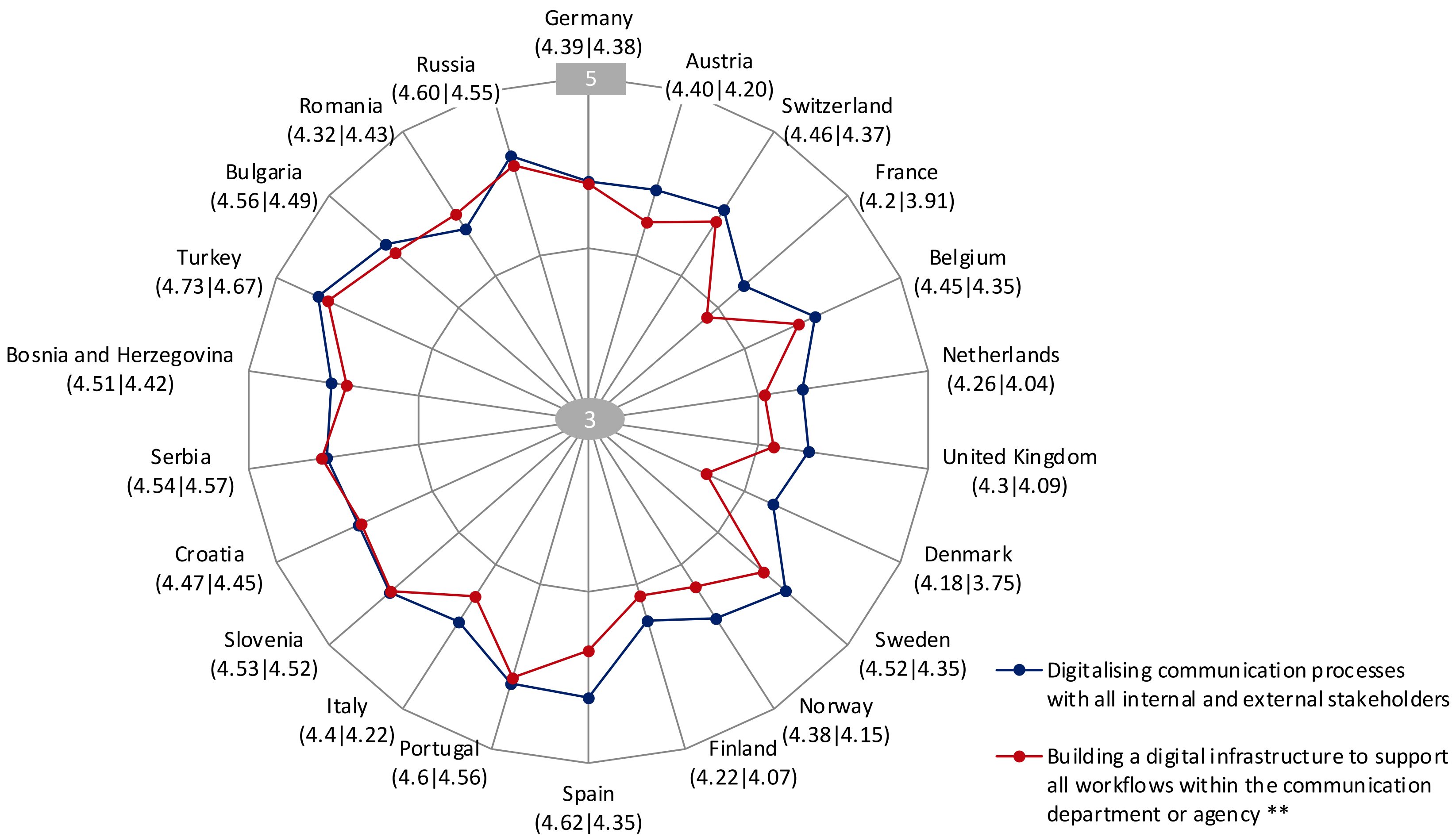
Importance of digitalising stakeholder communications and building a digital infrastructure



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,664 communication professionals. Q 1: Most communication departments and agencies use software applications and digital services to support stakeholder communications and internal workflow. The Covid-19 pandemic and trends towards more agility and virtual collaboration speed up this development. But it doesn't mean that such investments and changes are always necessary to meet goals and expectations. How important are the following aspects for the success of your communication department or agency? Scale 1 (Not important) – 5 (Very important).

The need to improve the digital infrastructure for communications is greater in Southern and Eastern Europe

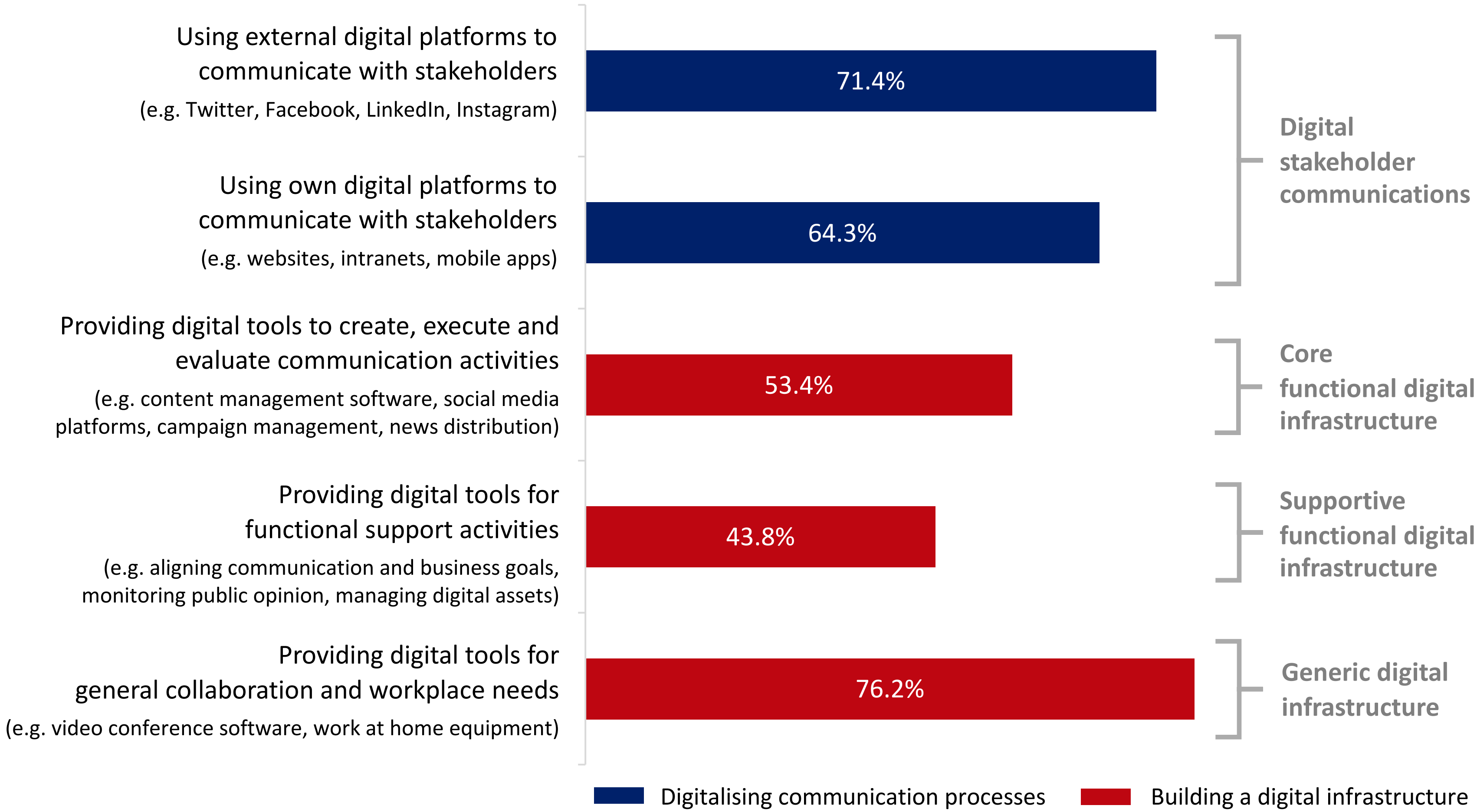
Importance of digitalising stakeholder communications and building a digital infrastructure



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,382 communication professionals from 22 countries. Q 1: How important are the following aspects for the success of your communication department or agency? Scale 1 (Not important) – 5 (Very important). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01).

Digital maturity of communication departments and agencies in Europe: Much room for improvement, especially regarding functional infrastructure

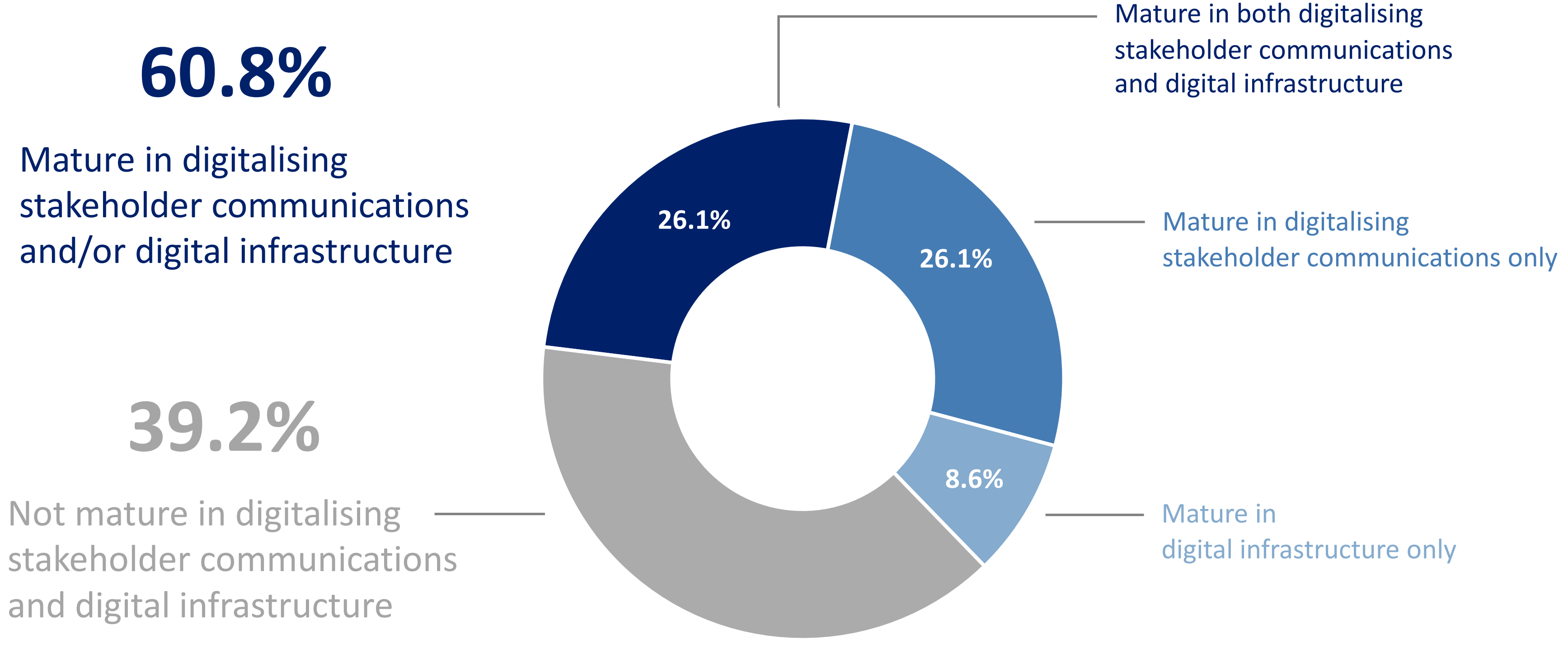
Maturity (capability and performance) in digitalising stakeholder communications and digital infrastructure



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,664 communication professionals. Q 2: How do you assess the current level of maturity (capability and performance) of your communication department / agency in the following dimensions? Scale 1 (Very low) – 5 (Very high). Frequency based on scale points 4-5.

Four out of ten communication departments and agencies are digitally immature, while one quarter are rated as mature in all key dimensions

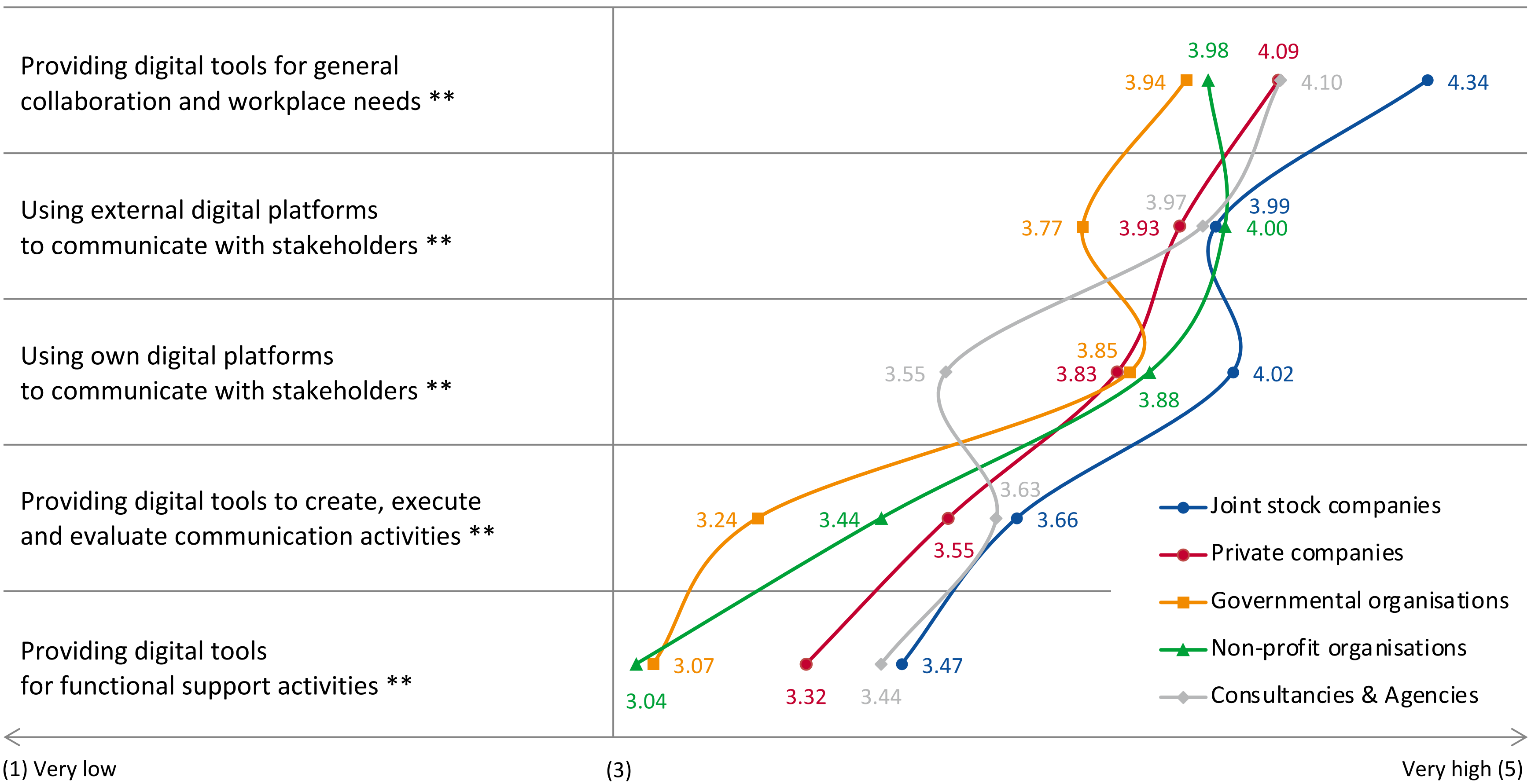
Maturity (capability and performance) in digitalising stakeholder communications and digital infrastructure



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,664 communication professionals. Q 2: How do you assess the current level of maturity (capability and performance) of your communication department / agency in the following dimensions? Scale 1 (Very low) – 5 (Very high). Mature in both digitalising stakeholder communications and digital infrastructure: Scale points 4 or 5 on all five items. Mature in digitalising stakeholder communications only: Scale points 4 or 5 on both items addressing digitalising stakeholder communications. Mature in digital infrastructure only: Scale points 4 or 5 on all items addressing infrastructure.

Digital maturity varies significantly across different types of organisations: Joint stock companies outperform other organisations in almost every dimension

Maturity (capability and performance) in digitalising stakeholder communications and digital infrastructure



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,664 communication professionals. Q 2: How do you assess the current level of maturity (capability and performance) of your communication department / agency in the following dimensions? Scale 1 (Very low) – 5 (Very high). Mean values.
** Highly significant differences (ANOVA, $p \leq 0.01$).

Communicators working in different fields of practice experience digitalisation quite differently – not all needs seem to be served equally

Maturity (capability and performance) in digitalising stakeholder communications and digital infrastructure

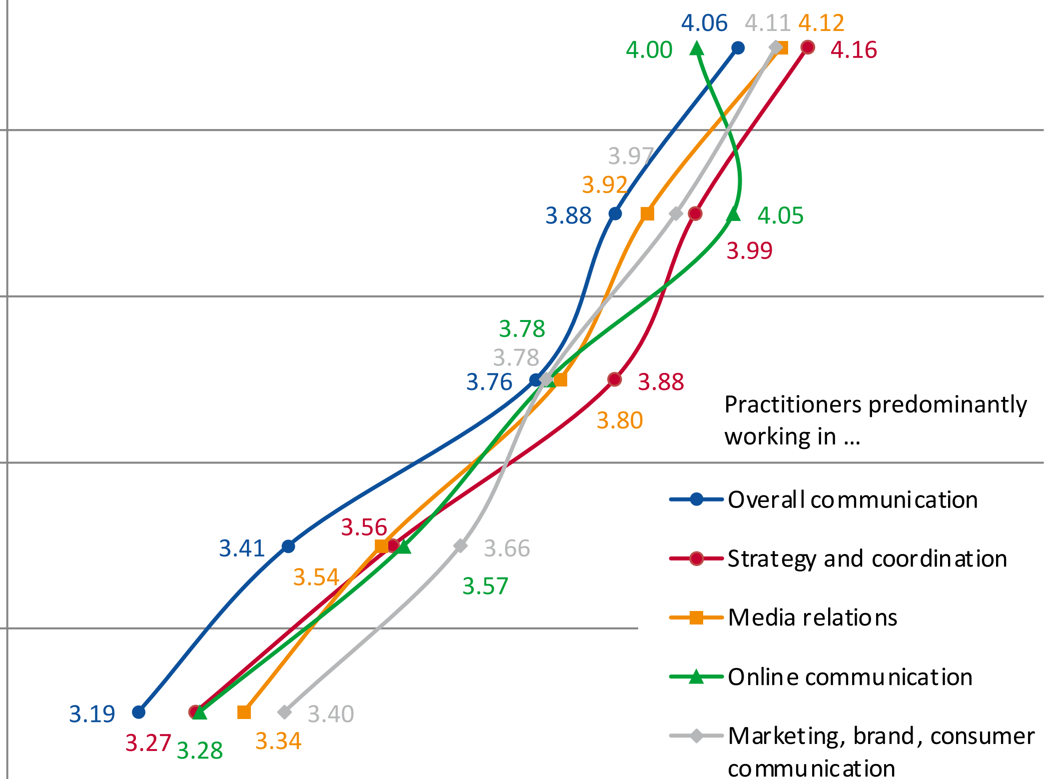
Providing digital tools for general collaboration and workplace needs **

Using external digital platforms to communicate with stakeholders **

Using own digital platforms to communicate with stakeholders **

Providing digital tools to create, execute and evaluate communication activities **

Providing digital tools for functional support activities **

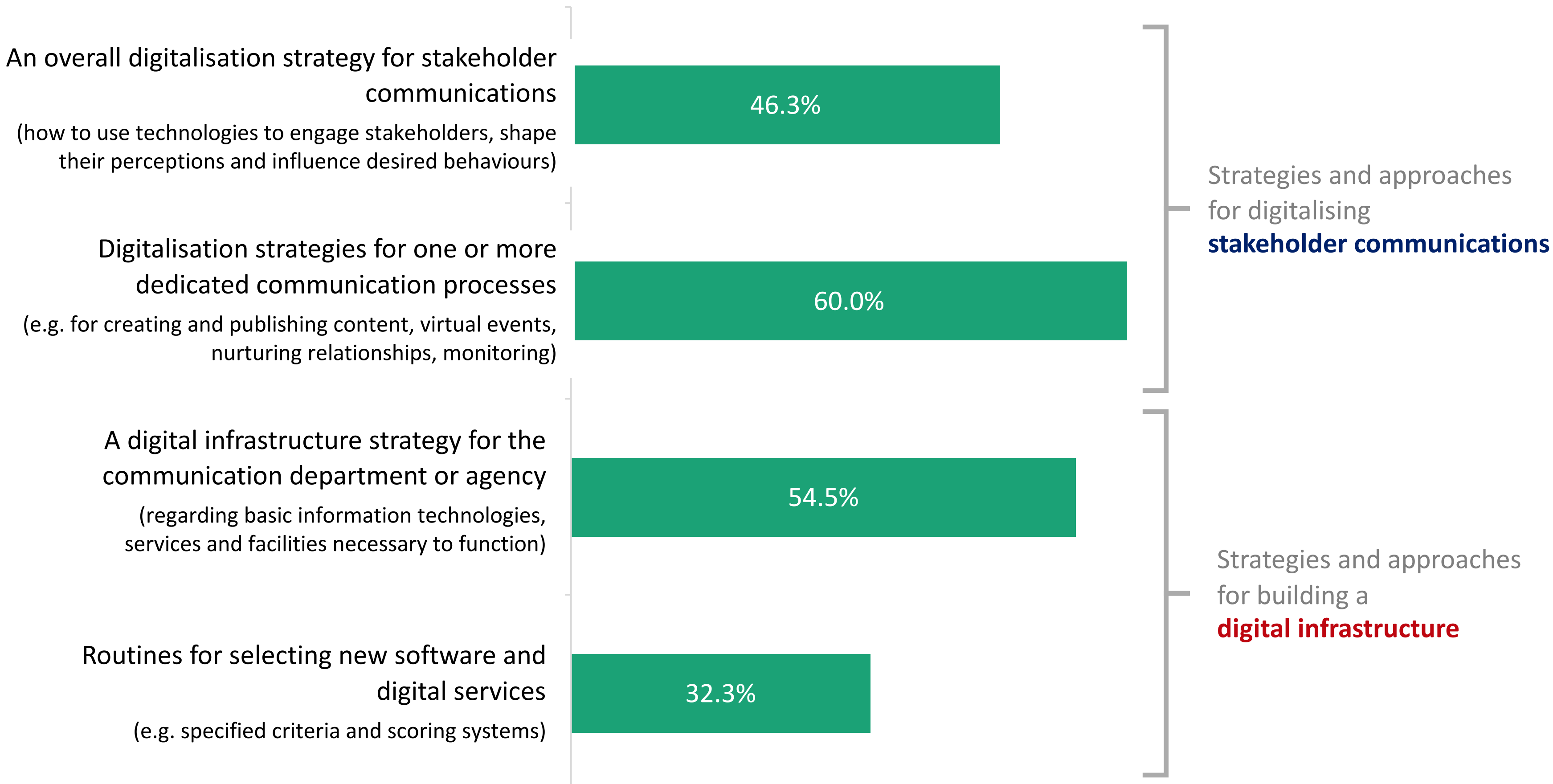


(1) Very low (3) Very high (5)

www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 671 communication professionals. Q 2: How do you assess the current level of maturity (capability and performance) of your communication department / agency in the following dimensions? Scale 1 (Very low) – 5 (Very high). Mean values.
** Highly significant differences (ANOVA, p ≤ 0.01).

Strategies and concepts for digitalising stakeholder communications and internal workflows are lacking in many communication departments and agencies

My communication department / agency has …



www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 2,462 communication professionals. Q 3: Introducing digitalisation and digital infrastructure is a change process. Some communication departments and agencies have developed strategies and approaches for this, which are formally documented and communicated in the team. How would you describe the situation in your organisation? Scale 1 (Not developed at all) – 5 (Fully developed). Frequency based on scale points 4-5.

Strategies for transforming social dimensions (people, structure) as well as tasks for digitalisation are less prevalent than those focusing on technology

My communication department / agency has digitalisation strategies and approaches for …

Technical system

Technology: 48.3%

(using technologies for stakeholder communications, building a digital infrastructure, and selecting new software and digital services)

Tasks: 39.4%

(describing tasks and how they can be transformed through digital technologies, e.g. writing, storytelling, presenting)

Social system

Structure: 42.1%

(transforming organisational structure in times of digitalisation, e.g. reconfiguring processes and reporting lines, new work routines and culture)

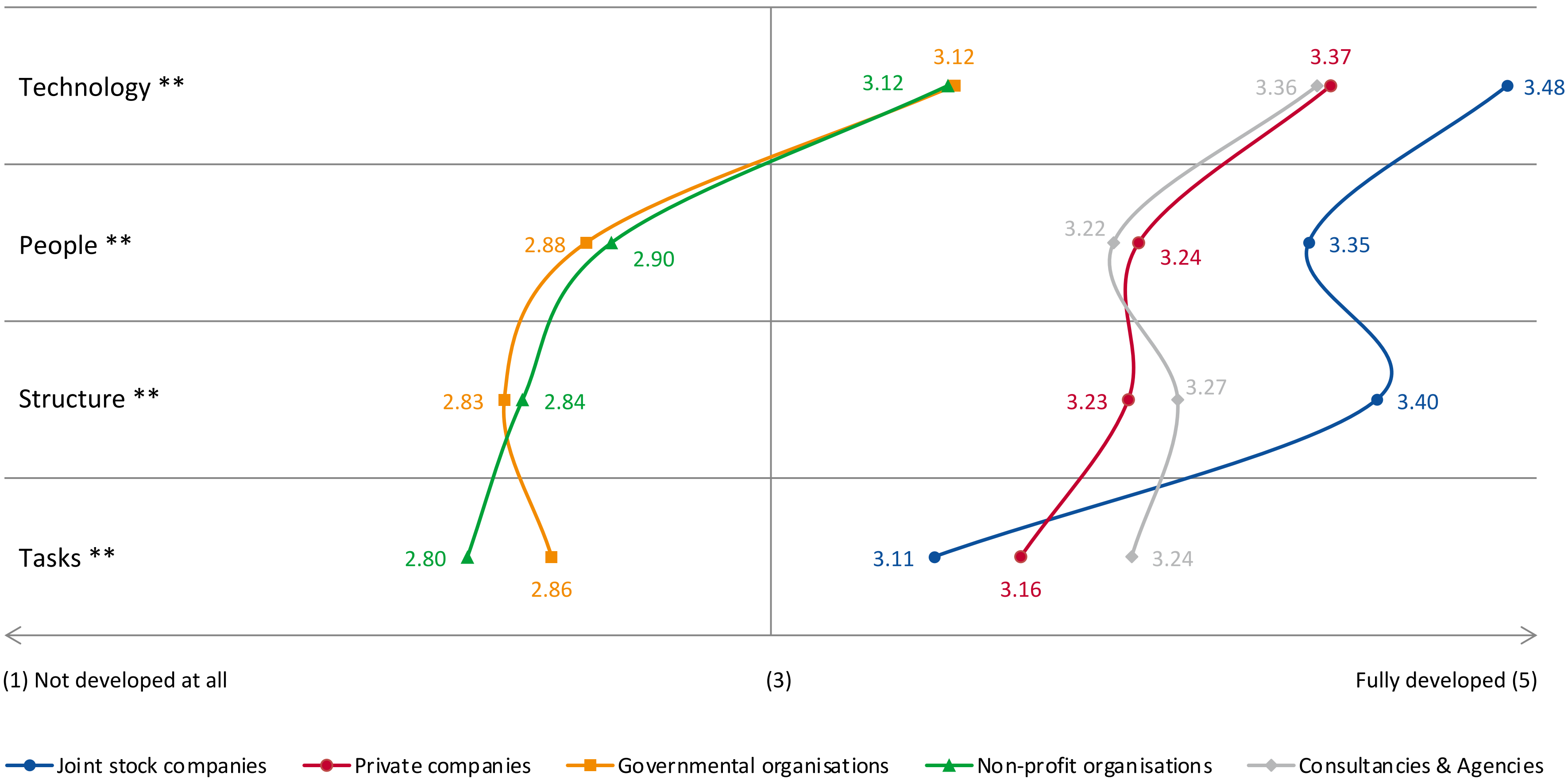
People: 41.9%

(transforming people in times of digitalisation, e.g. competence development, digital mindset)

www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 2,462 communication professionals. Q 3: Introducing digitalisation and digital infrastructure is a change process. Some communication departments and agencies have developed strategies and approaches for this, which are formally documented and communicated in the team. How would you describe the situation in your organisation? Scale 1 (Not developed at all) – 5 (Fully developed). Frequency based on scale points 4-5. Technology: Mean percentage of the four items on p. 24. Systematization reflects sociotechnical systems design (Bostrom & Heinen, 1977).

Companies, consultancies and agencies are significantly better in developing strategies and approaches for digitalisation and digital infrastructure

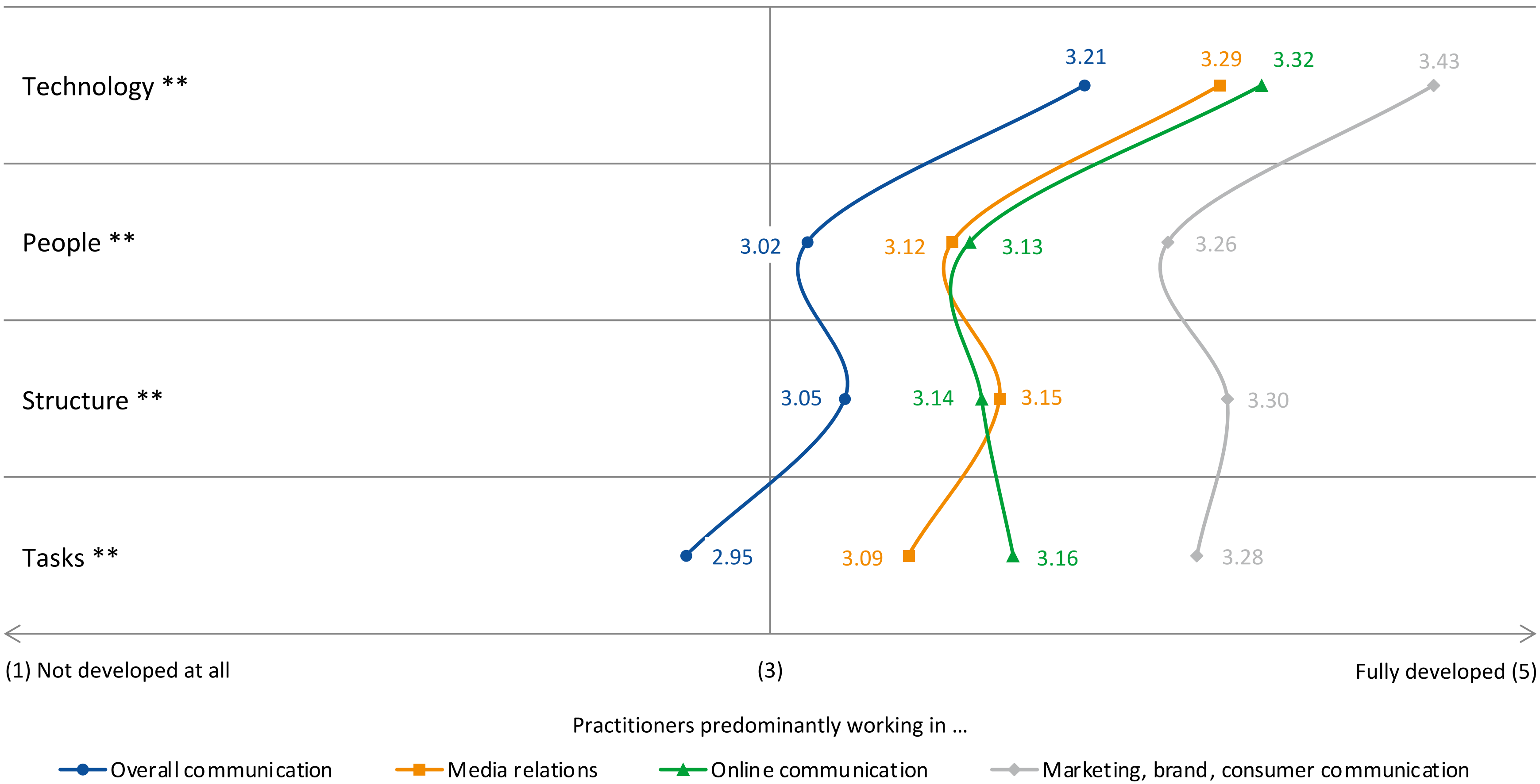
My communication department / agency has digitalisation strategies and approaches for ...



www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 2,462 communication professionals. Q 3: Introducing digitalisation and digital infrastructure is a change process. Some communication departments and agencies have developed strategies and approaches for this, which are formally documented and communicated in the team. How would you describe the situation in your organisation? Scale 1 (Not developed at all) – 5 (Fully developed). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01).

Marketing communication practitioners are more optimistic than their peers in other disciplines about digital strategy development in their organisation

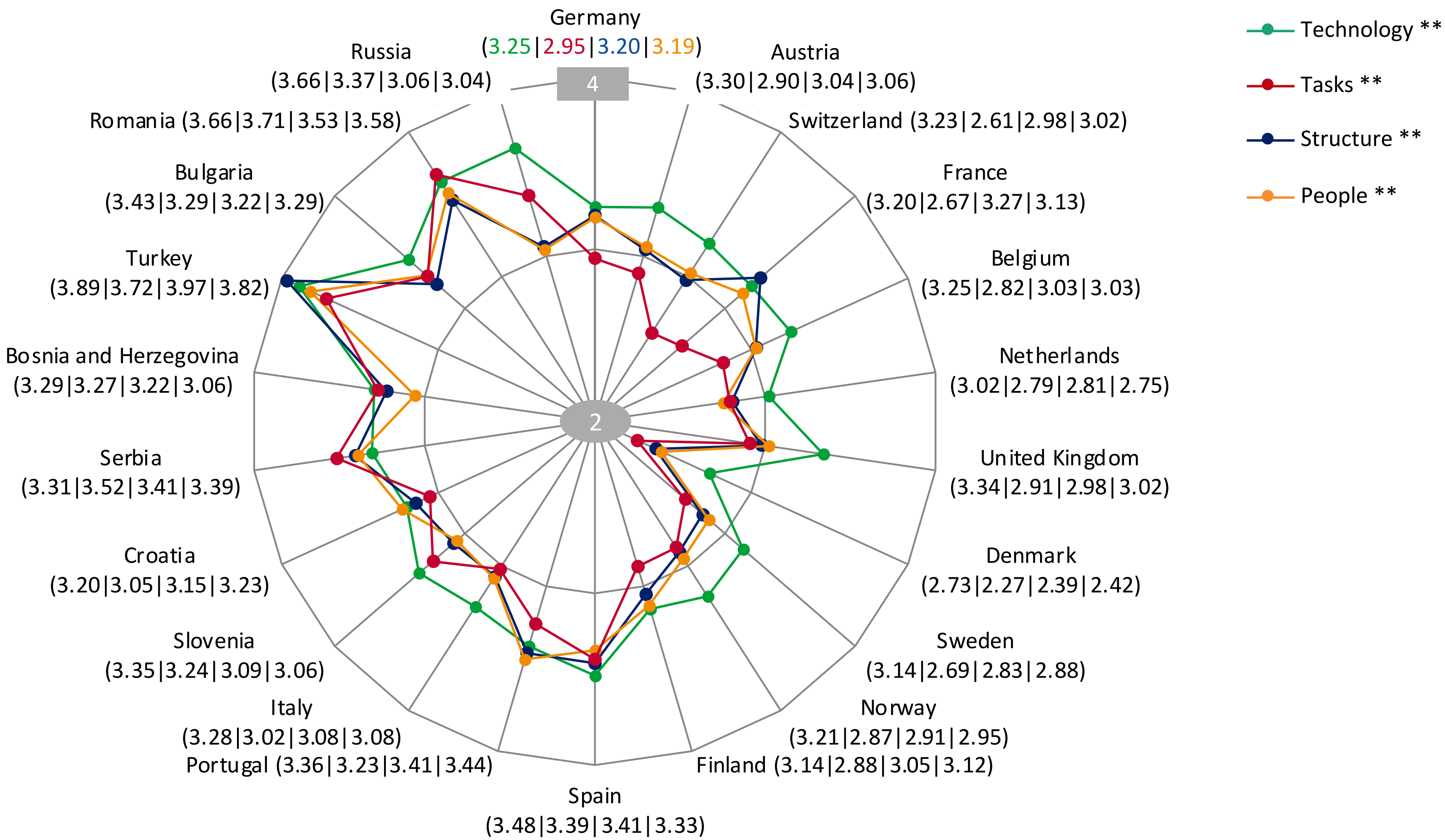
My communication department / agency has digitalisation strategies and approaches for …



www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 625 communication professionals. Q 3: Introducing digitalisation and digital infrastructure is a change process. Some communication departments and agencies have developed strategies and approaches for this, which are formally documented and communicated in the team. How would you describe the situation in your organisation? Scale 1 (Not developed at all) – 5 (Fully developed). Mean values. ** Highly significant differences (independent sample T-Test, p ≤ 0.01).

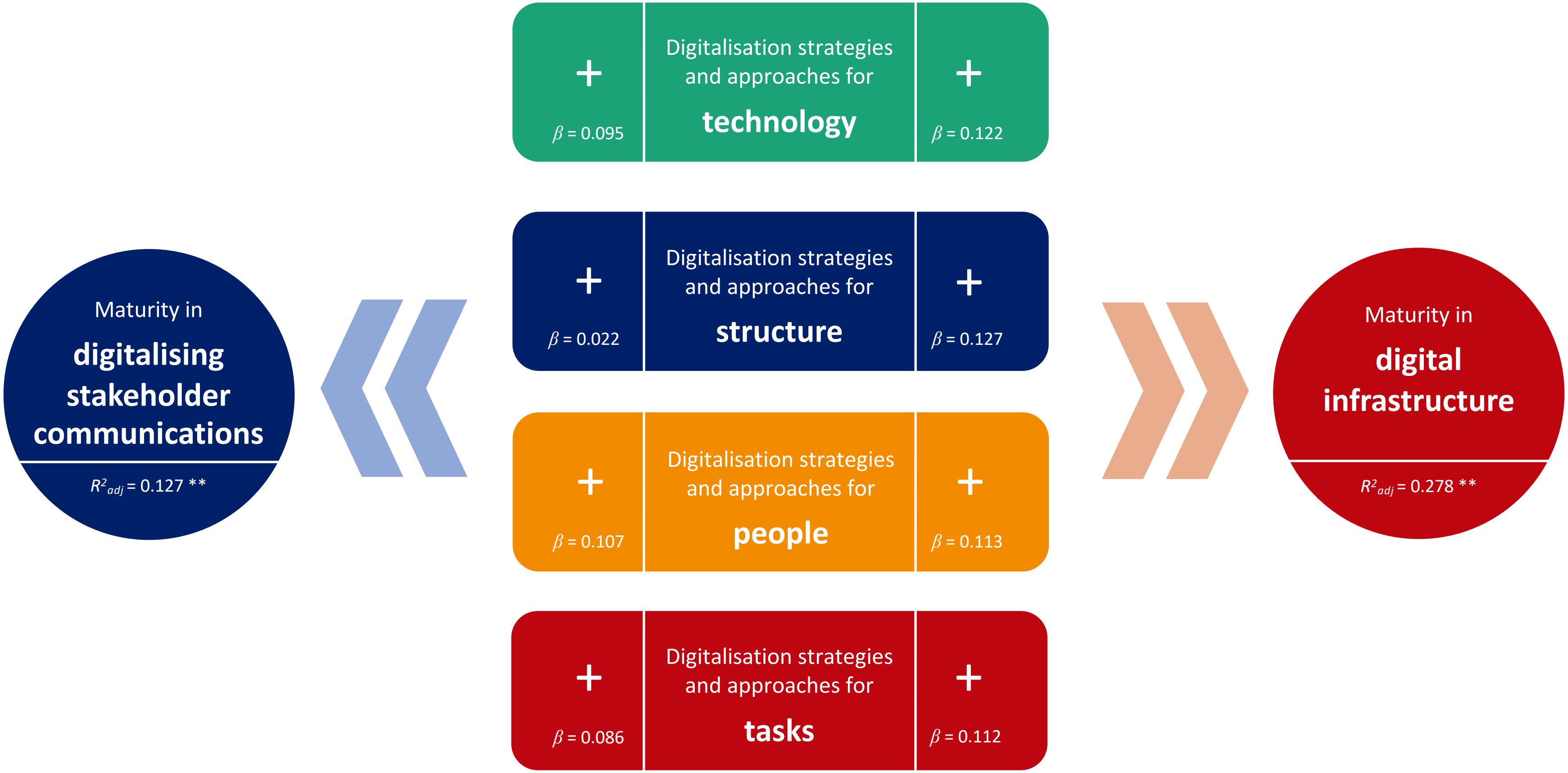
Differences in existing strategies and approaches to digitalisation between communication departments and agencies across countries

My communication department / agency has digitalisation strategies and approaches for …



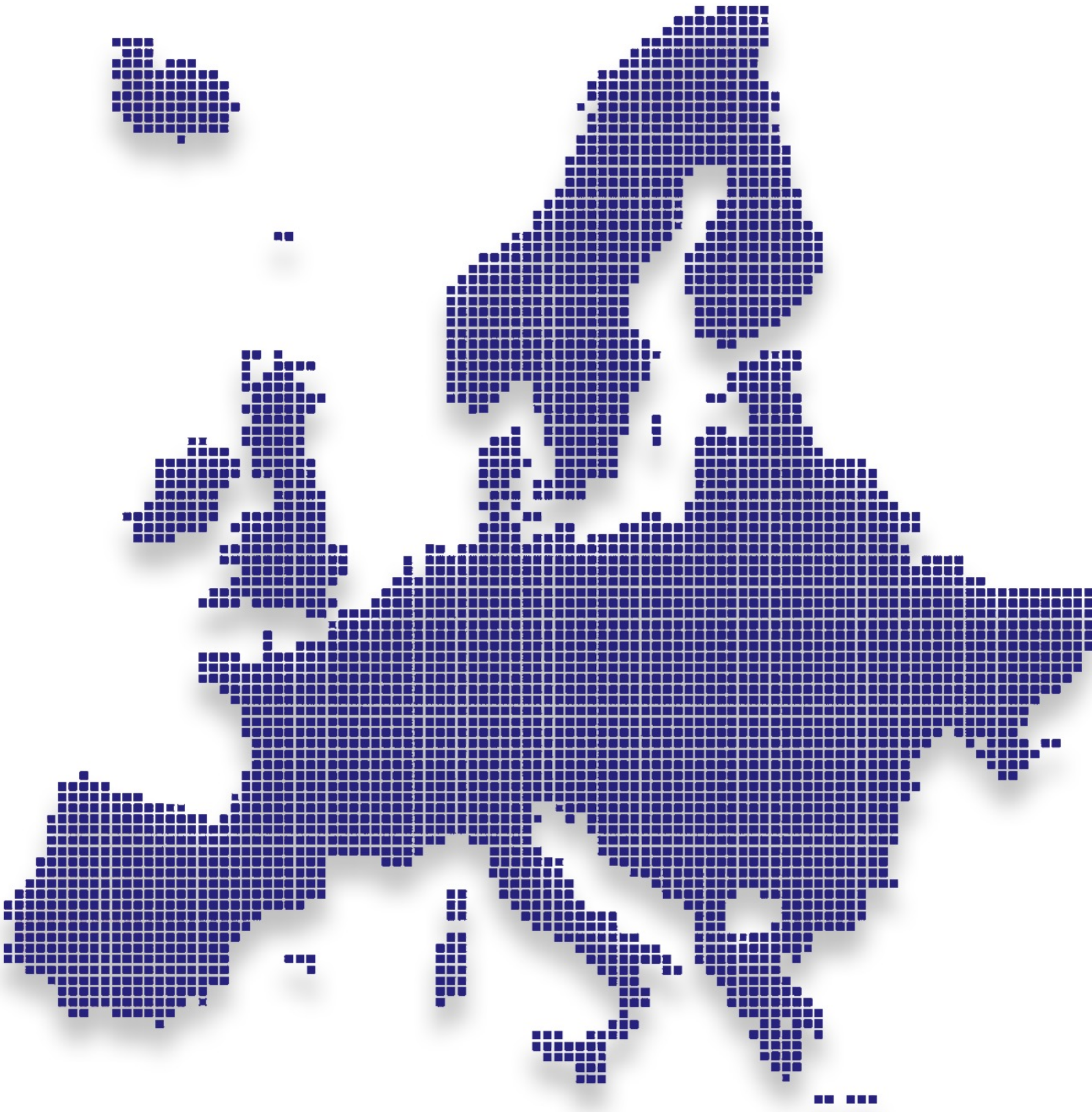
www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 2,201 communication professionals from 22 countries. Q 3: Introducing digitalisation and digital infrastructure is a change process. Some communication departments and agencies have developed strategies and approaches for this, which are formally documented and communicated in the team. How would you describe the situation in your organisation? Scale 1 (Not developed at all) – 5 (Fully developed). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01).

How strategic management influences digital maturity: Developing dedicated approaches predicts successful digitalisation of communications



www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 2,462 communication professionals. Q 2: How do you assess the current level of maturity (capability and performance) of your communication department / agency in the following dimensions? Scale 1 (Very low) – 5 (Very high). Q 3: Introducing digitalisation and digital infrastructure is a change process. Some communication departments and agencies have developed strategies and approaches for this, which are formally documented and communicated in the team. How would you describe the situation in your organisation? Scale 1 (Not developed at all) – 5 (Fully developed). ** Regression models highly significant ($p \leq 0.01$).

Video-conferencing for stakeholder communications



Video-conferencing for stakeholder communications

The way of working, collaborating and communicating has been profoundly transformed during the Covid-19 pandemic (Nagel, 2020). For most people, this has meant a significant upswing in remote interactivity and working from home (Bloom et al., 2021). This is widely supported by Zoom, MS Teams, Skype and other tools for video-conferencing (Serhan, 2020). While video-conferencing at work has long been mostly limited to communication in internal workflows amongst organisational members (Park et al., 2014), the pandemic has changed this fundamentally. In the communications field, video-conferencing has proliferated well beyond organisational boundaries towards mediating interactions with consumers, potential employees, or journalists. This constitutes an important shift in stakeholder communications and raises the question how does video-conferencing affect the profession? How effective it is with regard to different aspects of internal and external communication work, and to what extent is it here to stay—even after the pandemic?

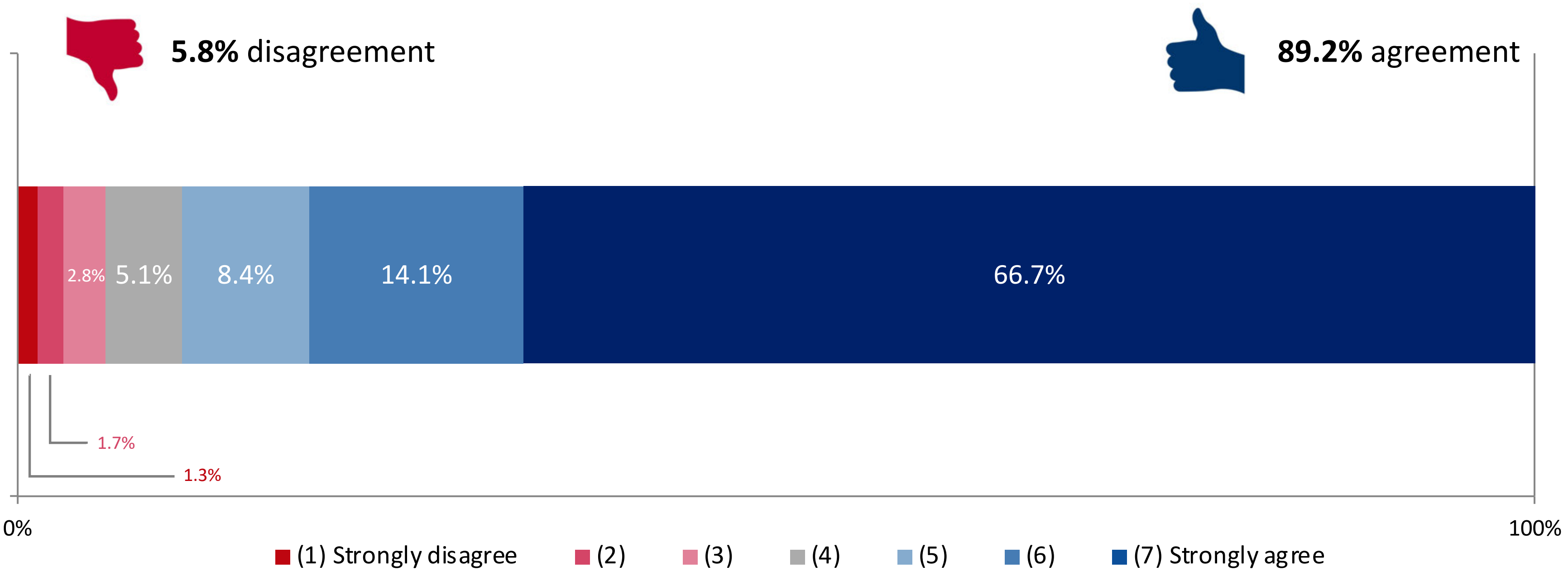
Our data shows that video-conferencing has clearly taken over as a common practice for stakeholder communications during the pandemic, with 89.2 per cent of communication professionals using these technologies frequently during the past year. Of course, this trend 'from physical to virtual' has to be understood in relation to specific practical domains, e.g., in the context of consumer events, employee meetings or press conferences: a virtual press conference replaces a site visit or product launch with journalists; and webinars with 'C-suite' managers are staged instead of attending physical townhall meetings. Somewhat expectedly, the most frequent use of video-conferencing can be seen in internal communications for informing and engaging employees (used by 92.5% of the organisations). Other practices, such as stakeholder dialogues (70.8%) or interviews and talks with journalists (64.3%) are virtualised less often. Governmental organisations are most conservative, especially when engaging with media contacts: only 55.5 per cent reported regular use of video-conferencing. When looking at the technology being used, we see that in terms of hardware bigger screens and more stationary conference-room and desktop setups (53.9%) are prioritised over smaller, more versatile equipment, such as laptops (40.6%) or smartphones and tablets (4.8%), while on the software side MS Teams (49.9%) is the most popular platform and Zoom (28.9%) is in second place.

While the pandemic essentially forced many communicators in a lot of instances to rely on video-conferencing, the pressing question remains about its application in a 'post-Covid' world. When looking at effectiveness, usefulness, and expectations to use video-conferencing, even outside of sheer necessity during the pandemic, a majority sees the technology continuously as an effective tool for their communications work (70.2%) and equally expect their stakeholders to share this opinion (71.5%). Interestingly, while most also expect significant pressure within their organisations to continue the use of video-conferencing (73.5%), fewer can see their organisation actually offering continued support for such formats (62.0%). This signals some interesting future tensions between the necessity to consider extant stakeholder practices, preferences, and expectations when choosing communication channel and design (Welch, 2012) on the one hand, and organisational-level support and demands on the other.

All in all, this study suggests that video-conferencing is here to stay: Three out of four practitioners intend to use it for stakeholder communications, even when the pandemic is over. However, country comparisons show striking and highly significant differences in the continuing acceptance of this technology across the continent, with comparatively less approval in Eastern and South-Eastern Europe.

Video-conferencing has been established as a common practice for stakeholder communications during the pandemic

"I used video-conferencing for stakeholder communications frequently in the last year."



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,664 communication professionals. Q 4: Most communication departments and agencies have used video-conferencing during the pandemic to engage with stakeholders inside and outside the organisation, e.g., by using Zoom, Teams or Skype or by staging virtual events, such as webinars, virtual press conferences, online presentations, etc. Please tell us about your experiences during the last year. Scale 1 (Strongly disagree) – 7 (Strongly agree).

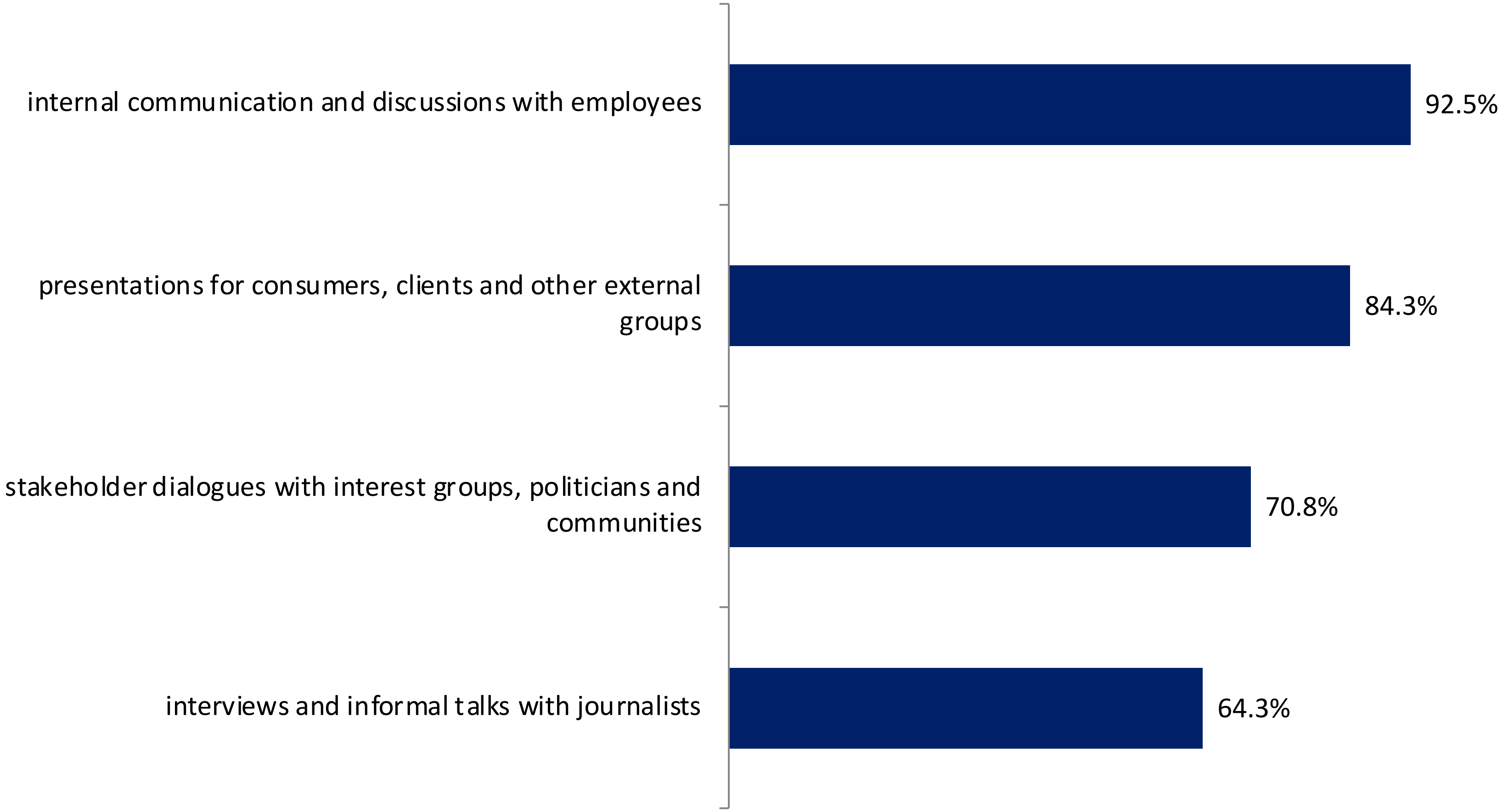
Use of video-conferencing for stakeholder communications across Europe

	Video-conferencing **not** frequently used (Disagreement)	Neutral	Video-conferencing frequently used (Agreement)		Video-conferencing **not** frequently used (Disagreement)	Neutral	Video-conferencing frequently used (Agreement)
Germany	4.8%	4.8%	90.5%	Spain	0.9%	0.9%	98.2%
Austria	9.4%	1.6%	89.1%	Portugal	1.9%	5.6%	92.6%
Switzerland	7.2%	2.4%	90.4%	Italy	5.2%	4.7%	90.1%
France	–	6.5%	93.5%	Slovenia	5.7%	4.5%	89.8%
Belgium	1.9%	5.8%	92.3%	Croatia	9.1%	7.3%	83.6%
Netherlands	6.3%	3.6%	90.2%	Serbia	9.2%	1.5%	89.2%
United Kingdom	3.0%	2.0%	95.0%	Bosnia and Herzegovina	6.2%	10.6%	83.2%
Denmark	10.4%	7.8%	81.8%	Turkey	4.1%	3.1%	92.8%
Sweden	6.4%	6.4%	87.1%	Bulgaria	7.4%	8.5%	84.0%
Norway	8.7%	1.9%	89.4%	Romania	8.4%	9.6%	82.0%
Finland	3.8%	2.9%	93.3%	Russia	5.7%	11.3%	83.0%

www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,382 communication professionals from 22 countries. Q 4: Most communication departments and agencies have used video-conferencing during the pandemic to engage with stakeholders inside and outside the organisation, e.g., by using Zoom, Teams or Skype or by staging virtual events, such as webinars, virtual press conferences, online presentations, etc. Please tell us about your experiences during the last year. Scale 1 (Strongly disagree) – 7 (Strongly agree). Disagreement = scale points 1-3; neutral = scale point 4; agreement = scale points 5-7.

Almost all communicators use video-conferencing frequently for internal communication; other practices like media relations are virtualised less often

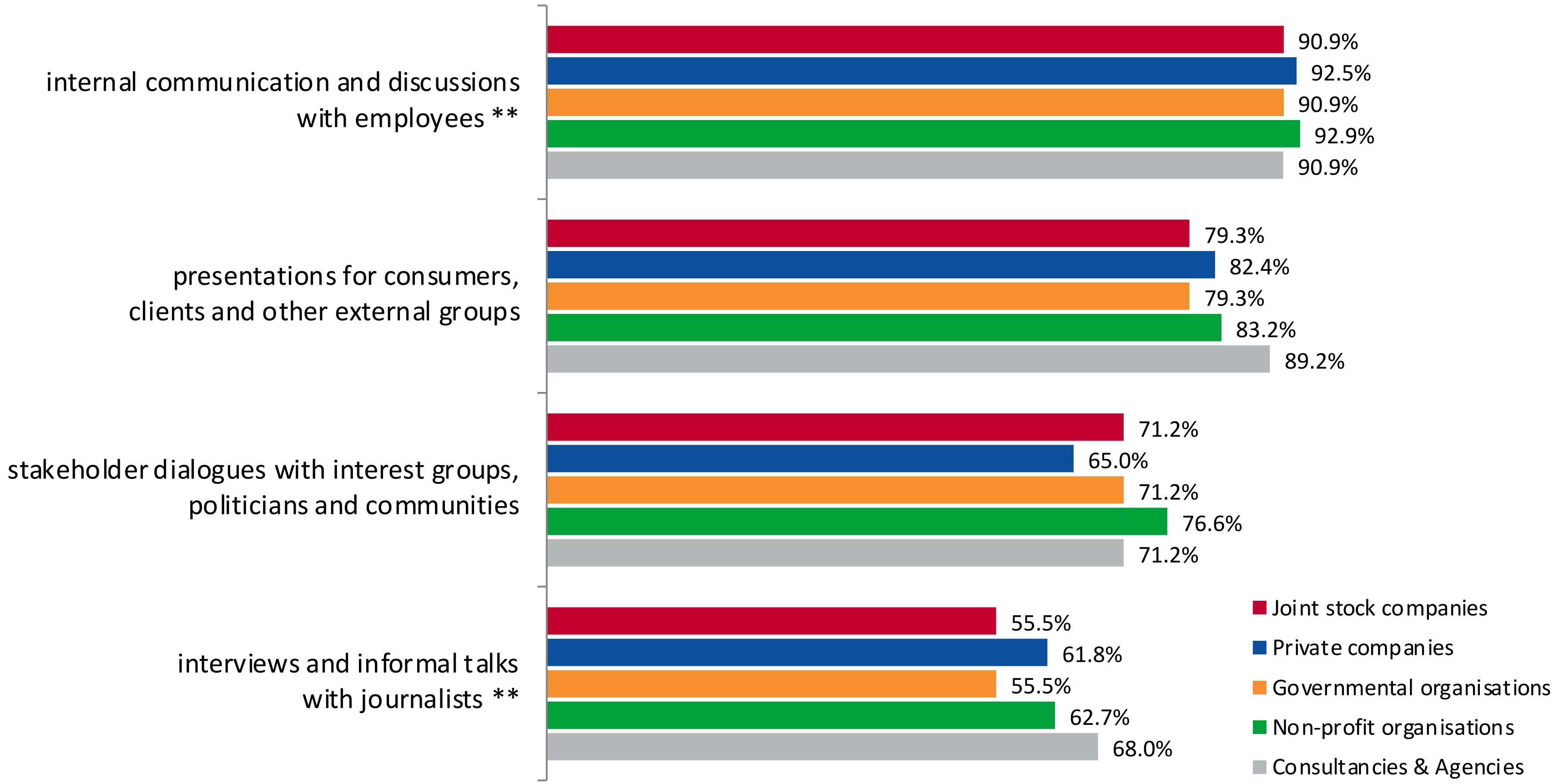
I used video-conferencing frequently for ...



www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 2,198 communication professionals. Q 5: Most communication departments and agencies have used video-conferencing during the pandemic to engage with stakeholders inside and outside the organisation, e.g., by using Zoom, Teams or Skype or by staging virtual events, such as webinars, virtual press conferences, online presentations, etc. Please tell us about your experiences during the last year. Scale 1 (Strongly disagree) – 7 (Strongly agree). Frequencies based on scale points 5-7.

Communicators working in listed companies and governmental organisations use Skype, Teams or Zoom less frequently to talk to journalists

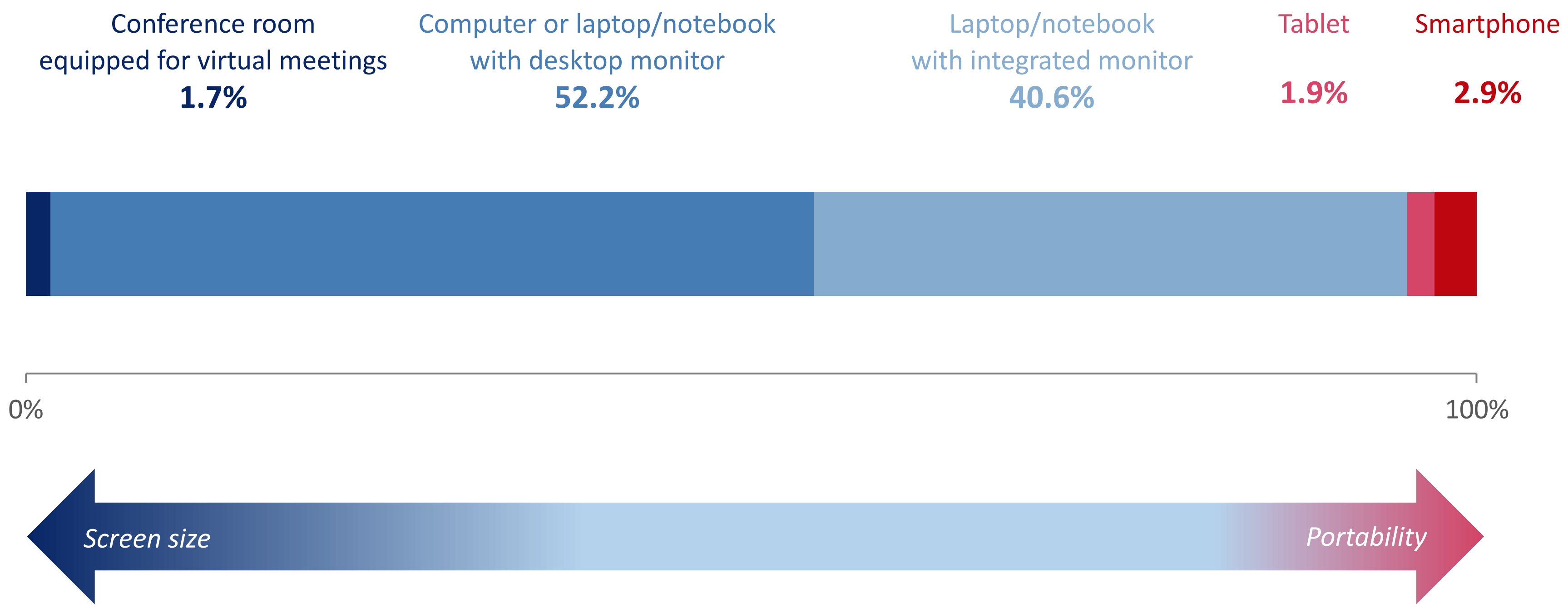
I used video-conferencing frequently for ...



www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 2,198 communication professionals. Q 5: Most communication departments and agencies have used video-conferencing during the pandemic to engage with stakeholders inside and outside the organisation, e.g., by using Zoom, Teams or Skype or by staging virtual events, such as webinars, virtual press conferences, online presentations, etc. Please tell us about your experiences during the last year. Scale 1 (Strongly disagree) – 7 (Strongly agree). Frequencies based on scale points 5-7. ** Highly significant differences (chi-square test, p ≤ 0.01)

Screen size over portability: The majority of communication professionals uses computers and laptops more often than mobile devices for video-conferencing

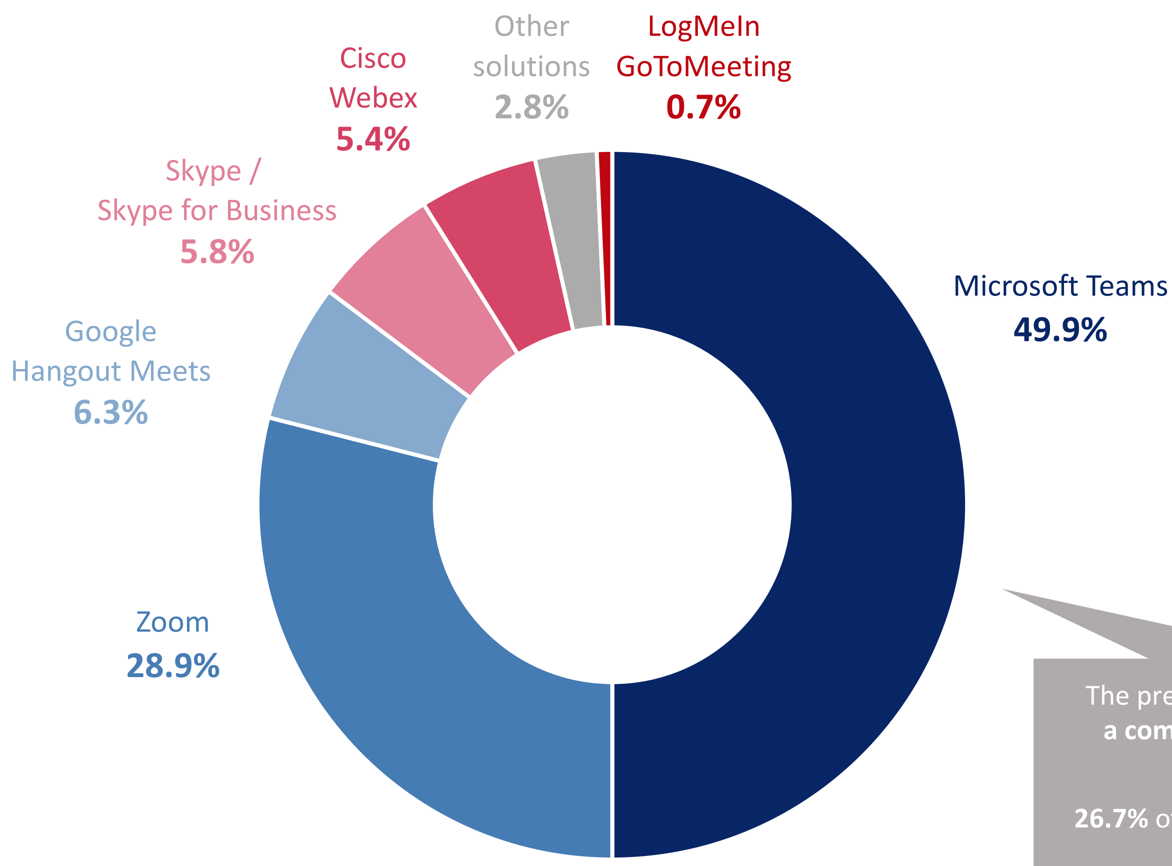
The most commonly used hardware for video-conferencing



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,661 communication professionals. Q 33: Which hardware do you use most often for video-conferencing with stakeholders? Frequency based on selection.

Microsoft Teams is the most popular service for video-conferencing among communicators in Europe; it is used by every second practitioner

The most commonly used software for video-conferencing

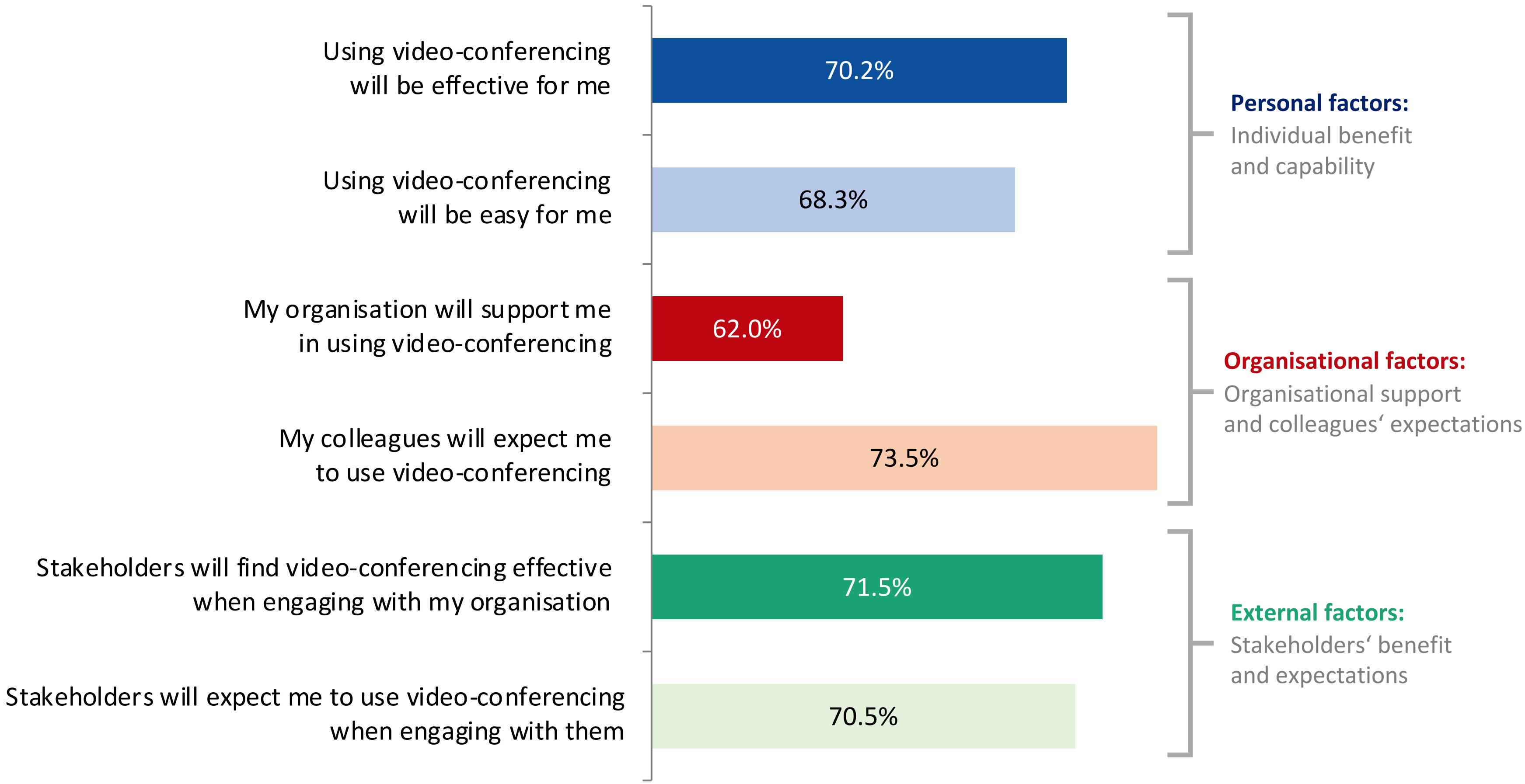


The prevailing hardware/software combination is **a computer or a laptop with desktop monitor** running **Microsoft Teams**.

26.7% of all communication professionals surveyed use this solution.

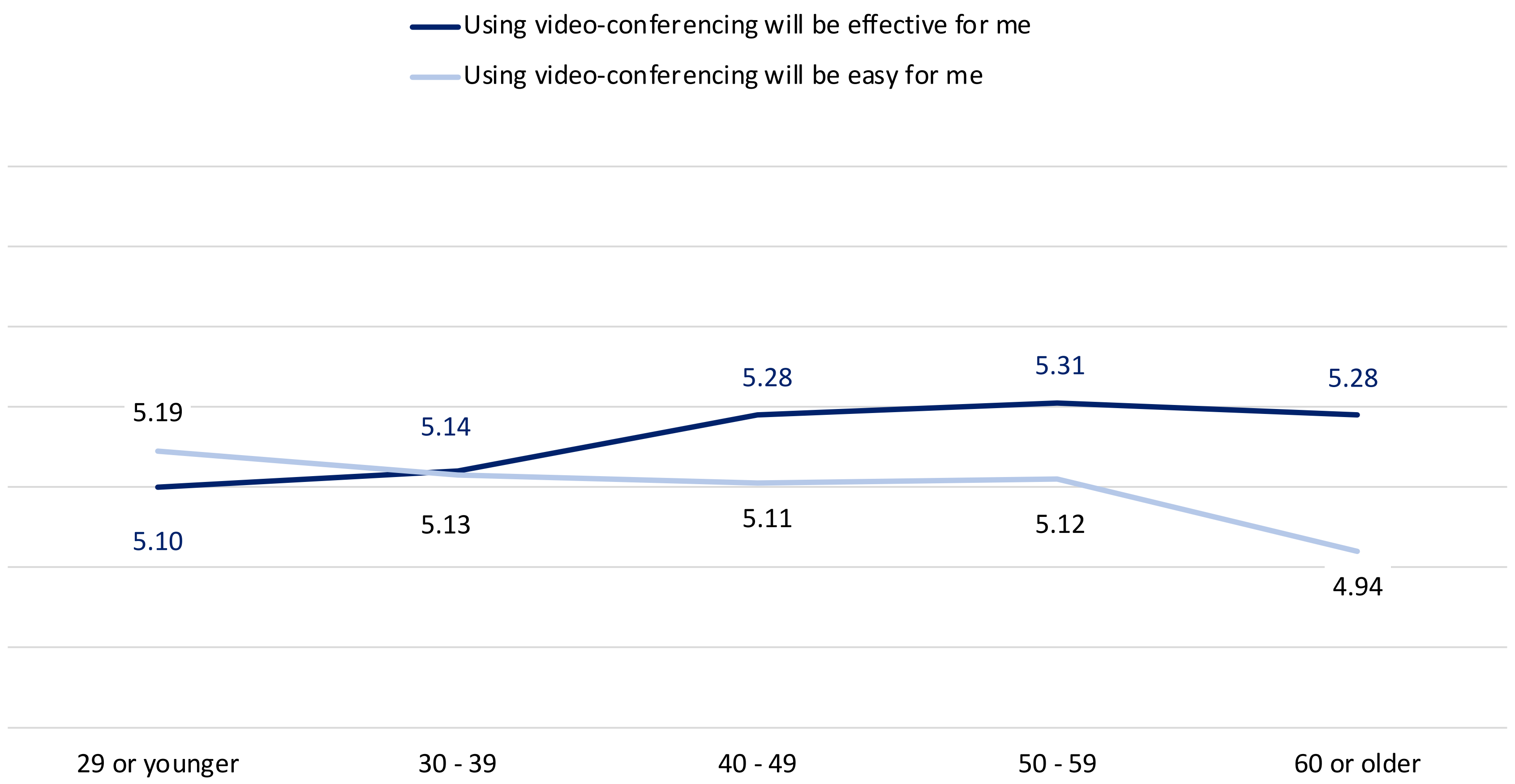
www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,646 communication professionals. Q 34: Which software do you use most often for video-conferencing with stakeholders? Frequency based on selection.

What drives the continued use of video-conferencing for stakeholder communications, even after the pandemic?



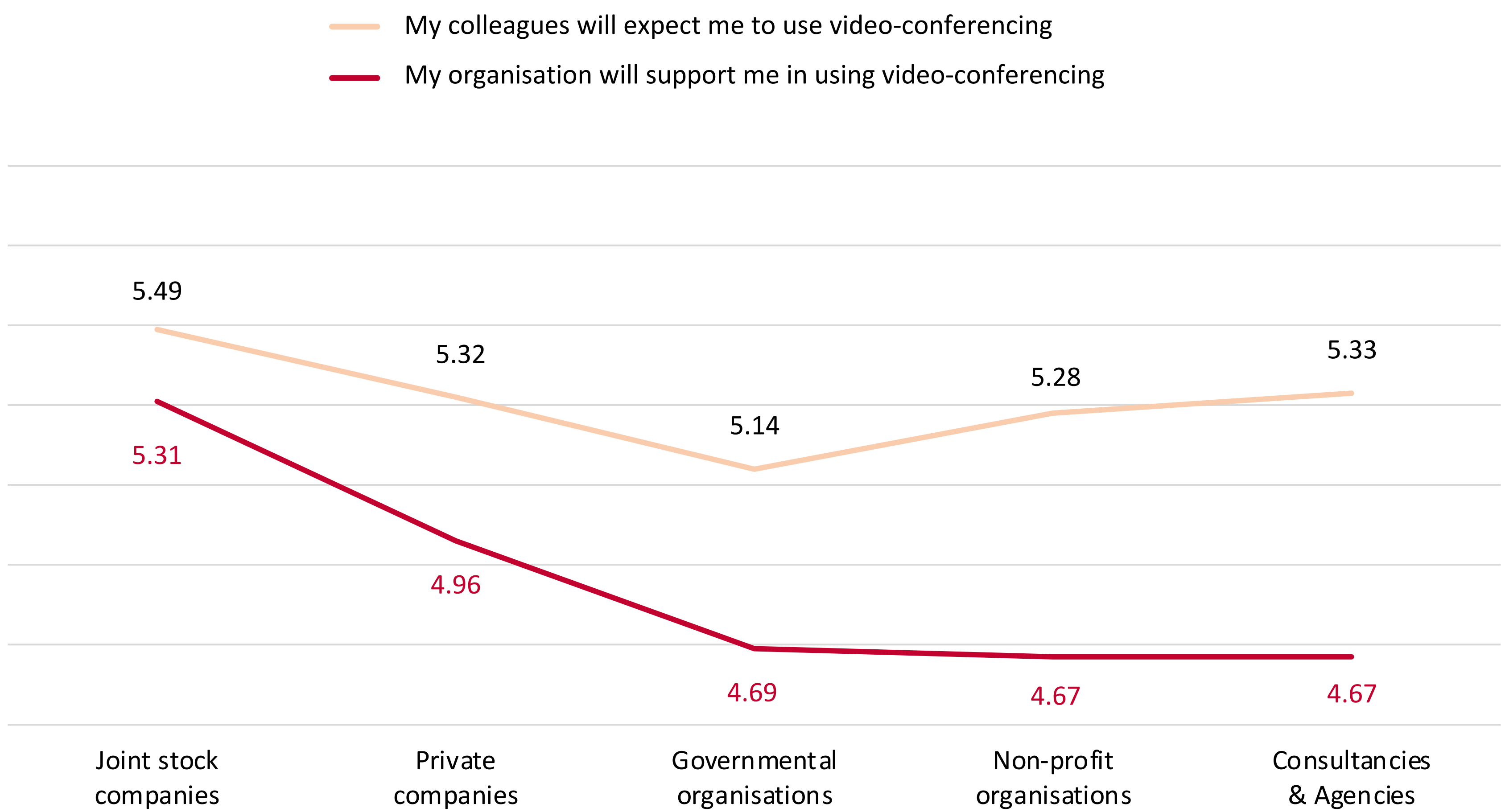
www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 2,152 communication professionals. Q 6/7: We are now interested in your opinions and expectations about the use of video-conferencing after the pandemic. Q 9/10: Overall organisational policies for video-conferencing as well as the use and expectations of immediate colleagues might vary across communication departments or agencies. Q 11/12: Last but not least, please tell us about the perspective of your key stakeholders on engaging with your organisation via video-conferencing. Q: Imagine that all restrictions are lifted and it is in no way mandatory to use video-conferencing: To what extent do you agree with the following statements? For each construct shown here, three items (two for organisational support) were rated on a scale 1 (Strongly disagree) – 7 (Strongly agree); an index was constructed based on mean results. Frequencies based on scale points 5-7 for indices.

Younger communication practitioners find it easier to use video-conferencing, while their older colleagues emphasise its effectiveness more often



www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 2,603 communication professionals. Q 6/7: We are now interested in your opinions and expectations about the use of video-conferencing after the pandemic. Q: Imagine that all restrictions are lifted and it is in no way mandatory to use video-conferencing: To what extent do you agree with the following statements? For both construct shown here, three items were rated on a scale 1 (Strongly disagree) – 7 (Strongly agree) and an index was constructed. Figure shows mean values for indices.

Joint stock companies are expected to be the most supportive when considering how video-conferencing will be used for communications in the future



www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 2,373 communication professionals. Q 9/10: Overall organisational policies for video-conferencing as well as the use and expectations of immediate colleagues might vary across communication departments or agencies. Q: Imagine that all restrictions are lifted and it is in no way mandatory to use video-conferencing: To what extent do you agree with the following statements? For the construct shown here, two resp. three items were rated on a scale 1 (Strongly disagree) – 7 (Strongly agree) and an index was constructed. Figure shows mean values for indices.

Future expectations for using video-conferencing in communications are quite high in all stakeholder groups, according to experts working in different disciplines

www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 68 communication professionals. Q 11/12: Last but not least, please tell us about the perspective of your key stakeholders on engaging with your organisation via video-conferencing. Q: Imagine that all restrictions are lifted and it is in no way mandatory to use video-conferencing: To what extent do you agree with the following statements? For both construct shown here, three items were rated on a scale 1 (Strongly disagree) – 7 (Strongly agree) and an index was constructed. Figure shows mean values for indices.

Assessments on the future of video-conferencing for stakeholder communications after the pandemic in Western and Northern Europe

	Using video-conferencing will be effective for me	Using video-conferencing will be easy for me	My organisation will support me in using video-conferencing	My colleagues will expect me to use video-conferencing	Stakeholders will find video-conferencing effective when engaging with my organisation	Stakeholders will expect me to use video-conferencing when engaging with them
Germany	74.5%	73.5%	67.2%	80.0%	77.3%	73.6%
Austria	64.8%	64.9%	60.5%	64.7%	68.9%	67.9%
Switzerland	75.8%	74.1%	62.0%	79.1%	77.2%	76.4%
France	62.3%	65.2%	52.8%	80.3%	72.1%	80.1%
Belgium	61.9%	61.3%	60.4%	76.3%	73.2%	75.6%
Netherlands	64.0%	57.2%	58.5%	75.7%	69.1%	73.1%
United Kingdom	76.6%	73.1%	61.4%	87.4%	78.4%	85.9%
Denmark	62.7%	59.2%	58.1%	75.2%	65.1%	69.8%
Sweden	82.0%	69.4%	51.8%	83.1%	81.2%	83.0%
Norway	76.4%	77.1%	58.2%	78.8%	73.8%	77.2%
Finland	77.4%	74.9%	55.5%	82.7%	83.2%	80.2%

www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 1,922 communication professionals from 22 countries. Q 6/7, Q 9/10, Q 11/12. Questions shown on p. 38 of this report. For each construct shown here, three items (two for organisational support) were rated on a scale 1 (Strongly disagree) – 7 (Strongly agree); an index was constructed based on mean results. Frequencies based on scale points 5-7 for indices.

Assessments on the future of video-conferencing for stakeholder communications after the pandemic in Southern and Eastern Europe

	Using video-conferencing will be effective for me	Using video-conferencing will be easy for me	My organisation will support me in using video-conferencing	My colleagues will expect me to use video-conferencing	Stakeholders will find video-conferencing effective when engaging with my organisation	Stakeholders will expect me to use video-conferencing when engaging with them
Spain	72.0%	71.3%	64.5%	76.6%	73.0%	78.1%
Portugal	74.7%	77.3%	63.6%	78.8%	74.5%	76.0%
Italy	65.2%	64.3%	65.9%	67.7%	62.9%	64.1%
Slovenia	70.9%	65.3%	66.2%	62.7%	64.2%	56.7%
Croatia	50.9%	48.5%	60.2%	54.3%	48.2%	49.7%
Serbia	67.0%	61.2%	59.0%	56.1%	66.3%	48.6%
Bosnia and Herzegovina	71.4%	65.5%	66.8%	54.6%	62.8%	58.9%
Turkey	67.6%	73.0%	71.9%	80.7%	72.0%	70.5%
Bulgaria	67.1%	68.0%	60.4%	65.9%	69.3%	69.0%
Romania	71.2%	72.9%	66.8%	69.6%	77.1%	68.3%
Russia	75.6%	74.7%	61.8%	68.1%	67.1%	63.3%

www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 1,922 communication professionals from 22 countries. Q 6/7, Q 9/10, Q 11/12. Questions shown on p. 38 of this report. For each construct shown here, three items (two for organisational support) were rated on a scale 1 (Strongly disagree) – 7 (Strongly agree); an index was constructed based on mean results. Frequencies based on scale points 5-7 for indices.

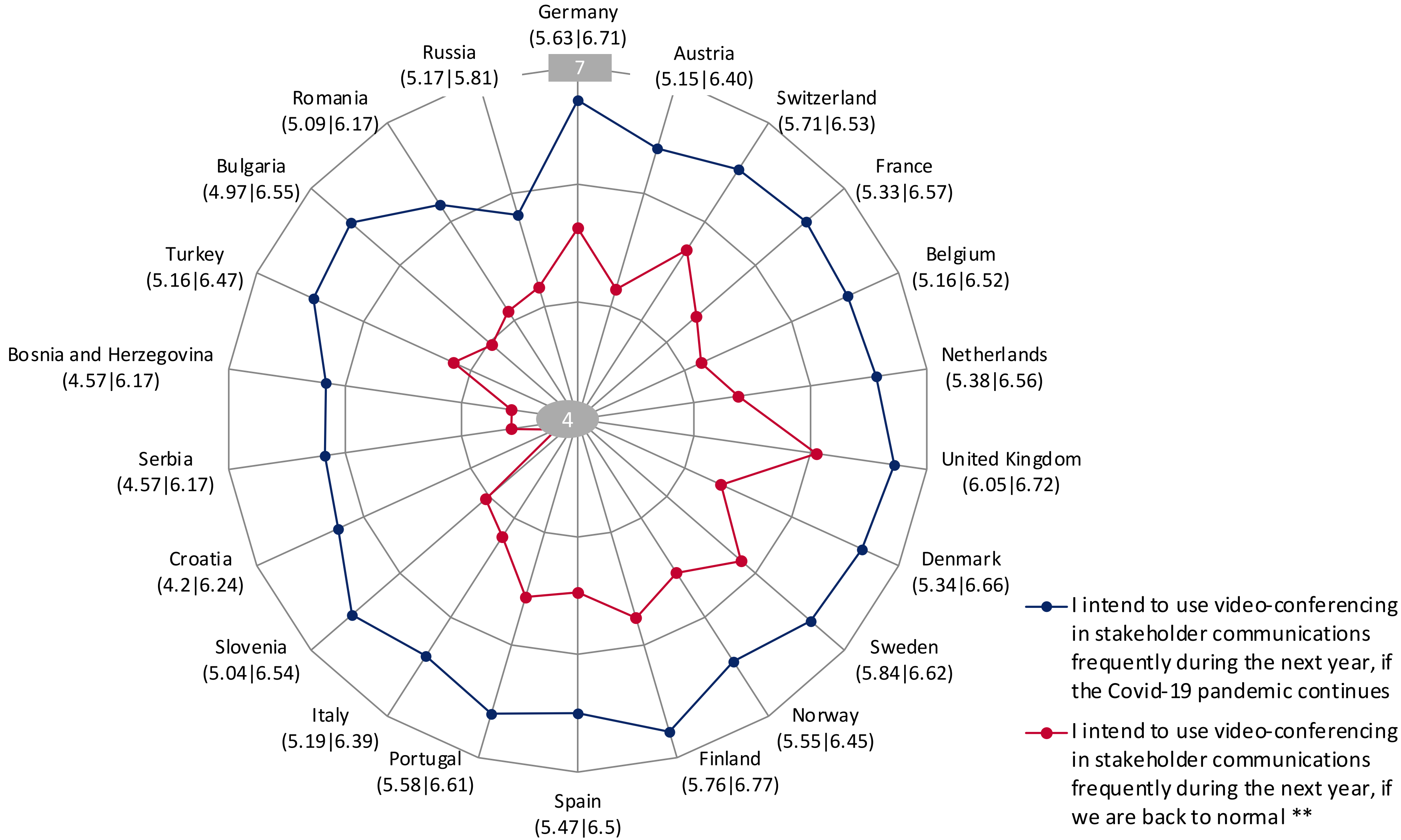
Video-conferencing is here to stay: Three out of four practitioners intend to use it for stakeholder communications, even when the pandemic is over

93.8%
Agreement

72.8%
Agreement

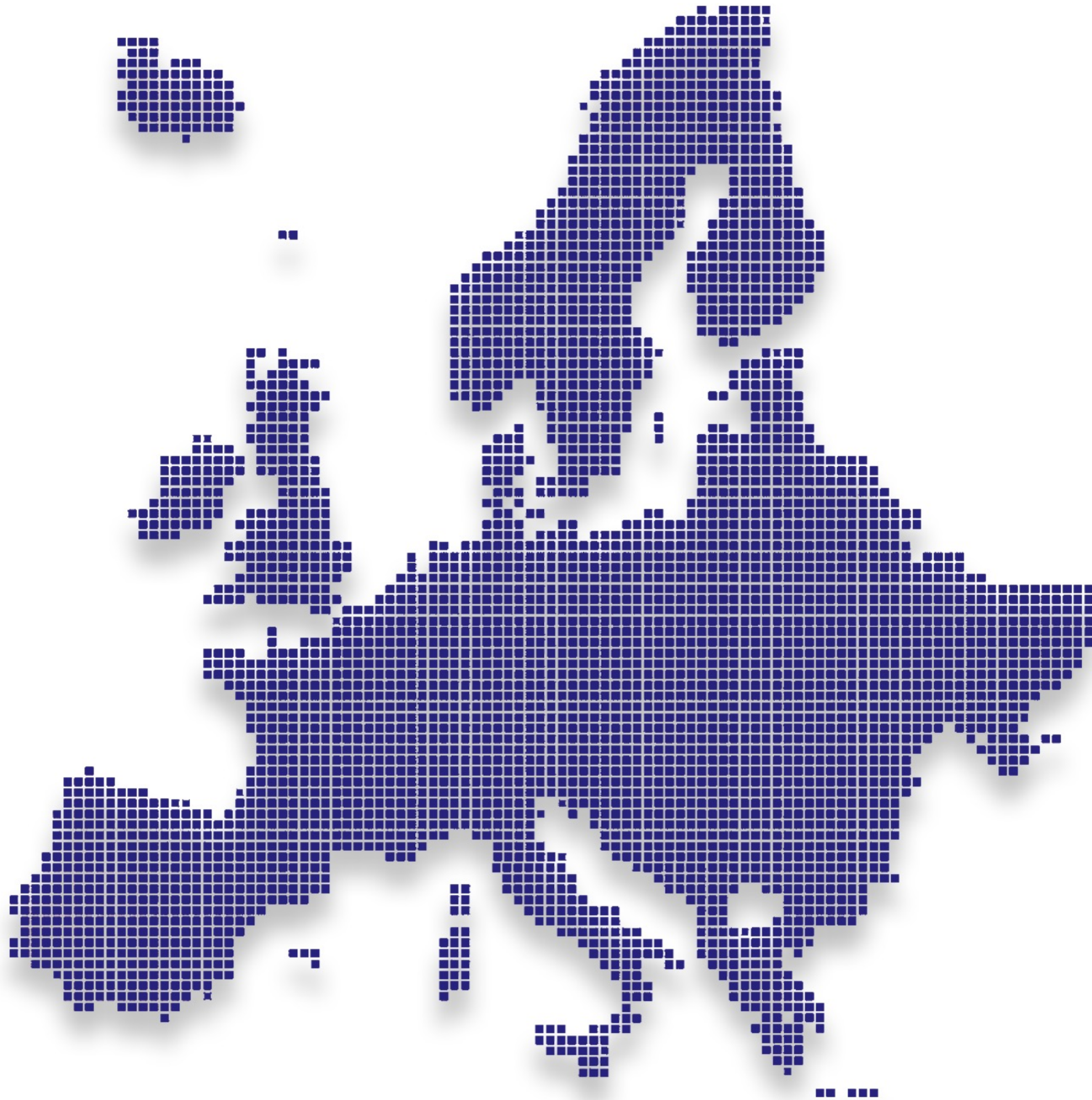
www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 2,585 communication professionals. Q 13: Generally speaking, to what extent do you agree with the following statements? Scale 1 (Strongly disagree) – 7 (Strongly agree). Frequencies based on scale points 5-7.

Striking and significantly different estimations across Europe on the use of video-conferencing for stakeholder communications when the pandemic is over



www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 2,309 communication professionals from 22 countries. Q 13: Generally speaking, to what extent do you agree with the following statements? Scale 1 (Strongly disagree) – 7 (Strongly agree). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01).

Future roles for communication professionals



Future roles for communication professionals

Communicators have a wide variety of tasks, ranging from aligning communication strategies and managing teams or departments to coaching employees in professional communication or advising top managers in decision-making processes. Exploring professional roles of communicators has been a popular research topic for decades (Broom & Smith, 1979; Dozier & Broom, 1995; Fieseler et al., 2015). Due to the increase in the range of tasks performed by practitioners, different facets of role assumption and related aspects such as competence development are being researched in the body of knowledge nowadays (Tench & Moreno, 2015; Verhoeven et al., 2011; Gregory & Willis, 2013; Zerfass & Franke, 2013; Falkheimer et al., 2017). Building on existing role concepts, recent research has suggested a new systematisation of the different roles of practitioners (Volk et al., 2017). Following this approach, this study distinguishes five roles that practitioners may perform to varying degrees during their worktime: the Communicator, Ambassador, Manager, Coach, and Advisor. The Communicator and Ambassador roles are traditional ‘outbound’ roles focusing on communicating with stakeholders, while the Coach and Advisor roles are ‘inbound’ roles focusing on supporting executives, middle managers or other members of the organisation. The Manager role includes dispositive tasks relevant for operating the communication department or agency itself.

Our study asked communication professionals to reflect on the enactment of and worktime spent in different roles, the competencies and skills for each role, and the importance of the Coach and Advisor roles. The results reveal that all respondents take on different roles simultaneously in their daily work. The Communicator role is enacted extensively by the largest portion of professionals (42.8%), followed by the Manager role (31.1%). While one quarter of the respondents spend a substantial share of their worktime as a Coach (27.7%) or Advisor (26.2%) as of now, more than half of the surveyed practitioners expect that these two roles will rise in importance in the next three years. Interestingly, a closer look shows that there is a strong correlation between the Coach and Advisor roles, indicating that both roles are often enacted simultaneously. Differences in the worktime spent in different roles arise when taking a closer look at organisation types, gender, hierarchy levels, and countries.

When it comes to the competencies and personal attributes relevant to the various roles, it is not surprising that a majority consider themselves well equipped to communicate on behalf of organisations (77.1%), but only one in two consider their management competencies to be high (49.8%). Team members estimate their managerial skills comparatively lower than practitioners on upper levels. Interestingly, respondents working in joint stock companies and agencies report a higher level of competencies for all roles than their peers in non-profits or governmental organisations. Communicators who perform the Advisor role most often advise top managers or heads of other departments on strategic business decisions, rather than middle managers. These advisors often have more than 10 years of professional experience and they have received specialised training in management concepts and strategic decision-making.

Future qualitative and quantitative research is needed to explore the identified differences across types of organisations, countries, and gender in more detail. Practitioners should reflect on their different roles and the necessary competencies for each task in order to advance their own career and position themselves as a sparring partner to others in the organisation (Zerfass & Volk, 2017).

Communication practitioners take on different roles simultaneously in their daily work

Communicator
- manages reputation, brand and crises
- creates campaigns and content
- manages and evaluates paid, owned, earned and shared media
- maintains relations with journalists and stakeholders

Ambassador
- communicates corporate strategies internally and externally to make them happen
- personally convinces politicians, investors, internal influencers, or important customers

Coach
- provides content for speeches, presentations, and social media posts
- offers communication training
- gives feedback

Manager
- defines processes and structures, allocates budgets
- hires and fires people
- develops competencies and tech infrastructure
- revises business models for communications
- maintains relationships with (internal) clients

Advisor
- explains opportunities and risks derived from monitoring public opinion or internal and external stakeholder expectations
- interprets trends in society

www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,664 communication professionals. Q 15: Communication professionals deal with a broad variety of tasks and activities. Please consider your own role(s) within your communication department or agency in a typical week.

Communicators: A closer look at the profile of practitioners who devote all or a substantial share of their worktime to the communicator role

"Our role is to develop and implement communication strategies for our organisation or clients."

Gender & Age

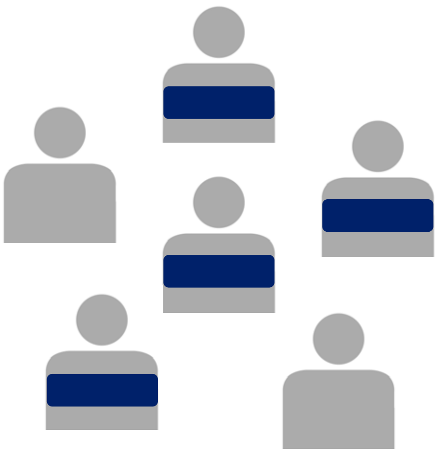
Two out of three practitioners in a communicator role are **female** (64.1% vs. 60.8% in the overall sample) and they are on average **43.1 years** old.

Job experience & Position

Compared to other roles, practitioners acting as communicators have the **highest share with less than 10 years** of professional experience (29.4%) and with the **lowest hierarchical level** (team member / consultant, 26.6%).

Areas of work

Most of them are allrounders – their main area of work is **overall communication** (42.7%).



42.8%

of the overall sample

Competencies

Almost all of them have **strong communication competencies** (89.5%), but every second (45.3%) **lacks managerial skills and knowledge**.

Specialised training

Many of them try to **upskill**: Almost every second practitioner in the communicator role has taken training sessions in **strategic decision-making and management concepts** (48.7%).

8.3% of the overall sample devote none or only a small share of their weekly worktime to this role

www.communicationmonitor.eu / Zerfass et al. 2021 / n = 1,141 communication professionals who ticked scale points 6 or 7 on item 1 of Q 15. Q 21, Q 28, Q29, Q30: Demographics, see p. 13-14. Q 16: Different roles require particular knowledge, skills, and personal attributes. How do you rate your competencies for the following roles? Scale 1 (Very low) – 7 (Very high). Frequencies based on scale points 6-7. Q 27: What are the dominant areas of your work? Q 32: Have you received specialised training in one or more of the following areas through continuing education courses or during your studies?

Ambassadors: A closer look at the profile of practitioners who devote all or a substantial share of their worktime to the ambassador role

"Our role is to directly convey strategic plans and decisions of our organisation or clients to key stakeholders."

Gender & Age

The **female share** of practitioners enacting the ambassador role is **62%** and the average age is **44 years**.

Job experience & Position

Three out of four professionals in the ambassador role have **more than 10 years** of job experience (73.2%).

Areas of work

Like practitioners in the communicator role, advisors' predominant area of work is **overall communication** (40.3%).

23.7%

of the overall sample

Competencies

They have **specific skills and knowledge** for their task: 78.3% hold high or very high competencies in areas such as comprehension, explication, persuasion.

Specialised training

They are also more likely to have under-gone **executive or personal coaching training** (28.4%) than practitioners who mainly perform other roles.

23.3% of the overall sample devote none or only a small share of their weekly worktime to this role

www.communicationmonitor.eu / Zerfass et al. 2021 / n = 1,141 communication professionals who ticked scale points 6 or 7 on item 2 of Q 15. Q 21, Q 28, Q29, Q30: Demographics, see p. 13-14. Q 16: Different roles require particular knowledge, skills, and personal attributes. How do you rate your competencies for the following roles? Scale 1 (Very low) – 7 (Very high). Frequencies based on scale points 6-7. Q 27: What are the dominant areas of your work? Q 32: Have you received specialised training in one or more of the following areas through continuing education courses or during your studies?

Managers: A closer look at the profile of practitioners who devote all or a substantial share of their worktime to the manager role

"Our role is to ensure operations, the development and positioning of our communication department or agency."

Gender & Age

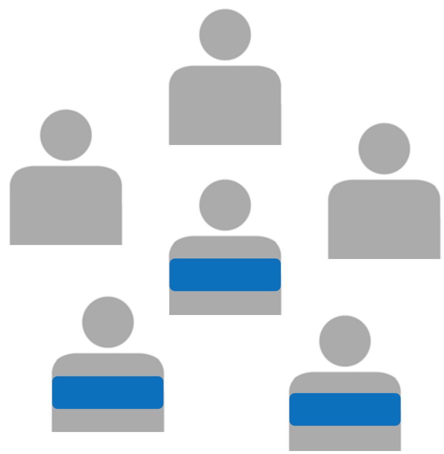
6 out of 10 professionals in the manager role are **female** (59.5%). Their average age is **44.3 years**.

Job experience & Position

The **share of leaders is highest** among practitioners enacting a managerial role; they are often CCOs / agency CEOs (52.5%) or team / unit leaders (27.7%).

Areas of work

Most of them work in **overall communication** (43.3%) or in **strategy and coordination** (35.8%).



31.1%

of the overall sample

Competencies

Many of them not only have **strong managerial competencies** (77.0%), but also rank high on **communication skills and knowledge** (83.7%).

Specialised training

Compared to other roles, managers have the highest proportion of those with **training in computer or data science and IT** (29.2%).

27.0% of the overall sample devote none or only a small share of their weekly worktime to this role

www.communicationmonitor.eu / Zerfass et al. 2021 / n = 1,141 communication professionals who ticked scale points 6 or 7 on item 5 of Q 15. Q 21, Q 28, Q29, Q30: Demographics, see p. 13-14. Q 16: Different roles require particular knowledge, skills, and personal attributes. How do you rate your competencies for the following roles? Scale 1 (Very low) – 7 (Very high). Frequencies based on scale points 6-7. Q 27: What are the dominant areas of your work? Q 32: Have you received specialised training in one or more of the following areas through continuing education courses or during your studies?

Coaches: A closer look at the profile of practitioners who devote all or a substantial share of their worktime to the coach role

"Our role is to help executives and/or other members of our organisation (or of our clients) to communicate better."

Gender & Age

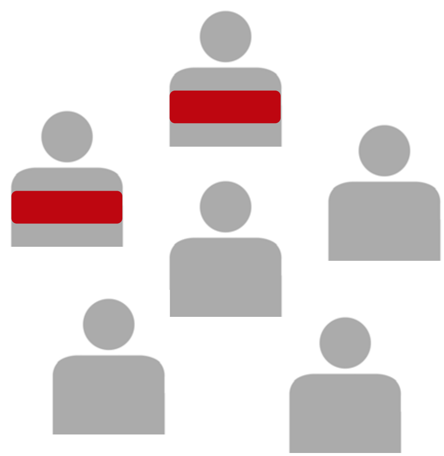
62.3% of professionals in the coach role are **female** and on average **44.6 years** old.

Job experience & Position

They rank **neither highest nor lowest** on any item of the experience and position scale, indicating that many of them are **right in the middle of their careers**.

Areas of work

7 out of 10 professionals in the coach role either work in **overall communication** (37.6%) or in **strategy and coordination** (32%).



27.7%
of the overall sample

Competencies

They rank highest on **coaching competencies** (75.9%), but they often also have strong skills in **advising** (71.8%).

Specialised training

About a third of them (36.5%) have participated in **training on process analyses, business models, and leadership essentials**.

19.1% of the overall sample devote none or only a small share of their weekly worktime to this role

www.communicationmonitor.eu / Zerfass et al. 2021 / n = 1,141 communication professionals who ticked scale points 6 or 7 on item 3 of Q 15. Q 21, Q 28, Q29, Q30: Demographics, see p. 13-14. Q 16: Different roles require particular knowledge, skills, and personal attributes. How do you rate your competencies for the following roles? Scale 1 (Very low) – 7 (Very high). Frequencies based on scale points 6-7. Q 27: What are the dominant areas of your work? Q 32: Have you received specialised training in one or more of the following areas through continuing education courses or during your studies?

Advisors: A closer look at the profile of practitioners who devote all or a substantial share of their worktime to the advisor role

"Our role is to support executives and/or other members of our organisation (or of our clients) to make better business decisions."

Gender & Age

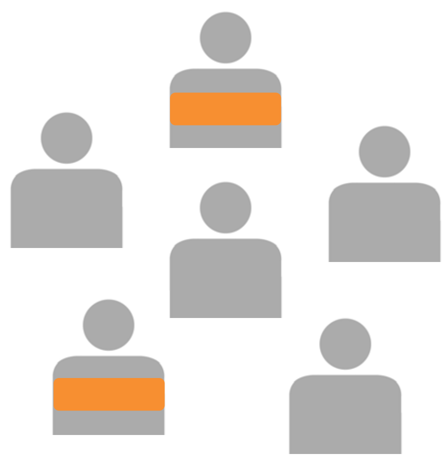
Compared to other roles, the **share of male professionals is highest** among advisors (43.1% vs. 39.2% in the overall sample) and they are the **oldest** (45 years on average).

Job experience & Position

Advisors also include the **largest proportion of seasoned practitioners** with more than 10 years of professional experience (77.3%).

Areas of work

They predominantly work in **strategy and coordination** (35.8%) or in **consultancy and advising** (35.5%).



26.2%

of the overall sample

Competencies

A large majority of them have **strong competencies in advising** (83.4%), but most of them also rate their **coaching** skills high (71.8%).

Specialised training

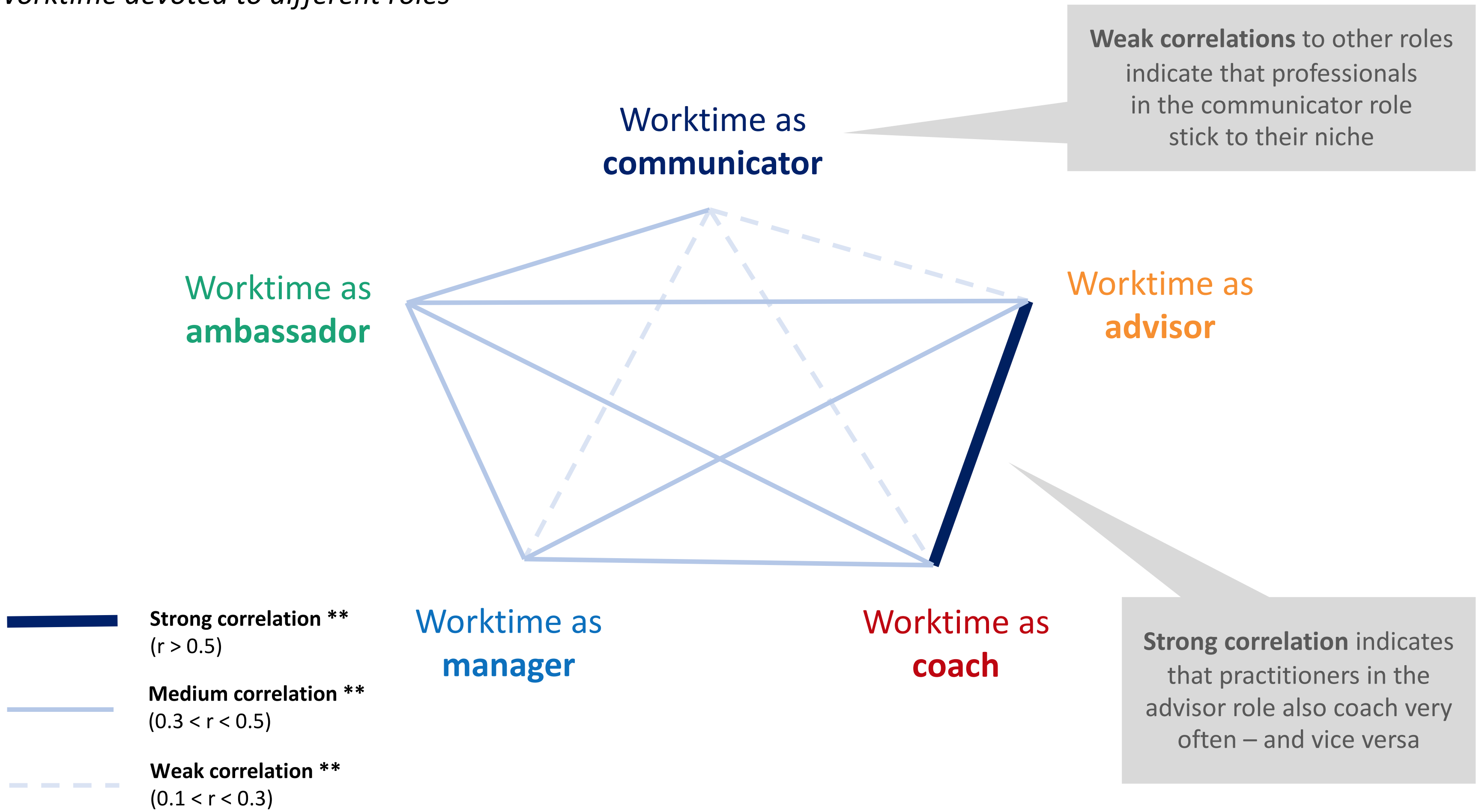
Advisors are the **most diligent in upskilling**: 56.2% have participated in **training on strategic decision-making and management concepts** and 38.1% engaged in **courses on process analyses, business models, and leadership essentials**.

23.0% of the overall sample devote none or only a small share of their weekly worktime to this role

www.communicationmonitor.eu / Zerfass et al. 2021 / n = 1,141 communication professionals who ticked scale points 6 or 7 on item 4 of Q 15. Q 21, Q 28, Q29, Q30: Demographics, see p. 13-14. Q 16: Different roles require particular knowledge, skills, and personal attributes. How do you rate your competencies for the following roles? Scale 1 (Very low) – 7 (Very high). Frequencies based on scale points 6-7. Q 27: What are the dominant areas of your work? Q 32: Have you received specialised training in one or more of the following areas through continuing education courses or during your studies?

How roles of communication practitioners are linked with each other: Correlation analysis on worktime devoted to different roles

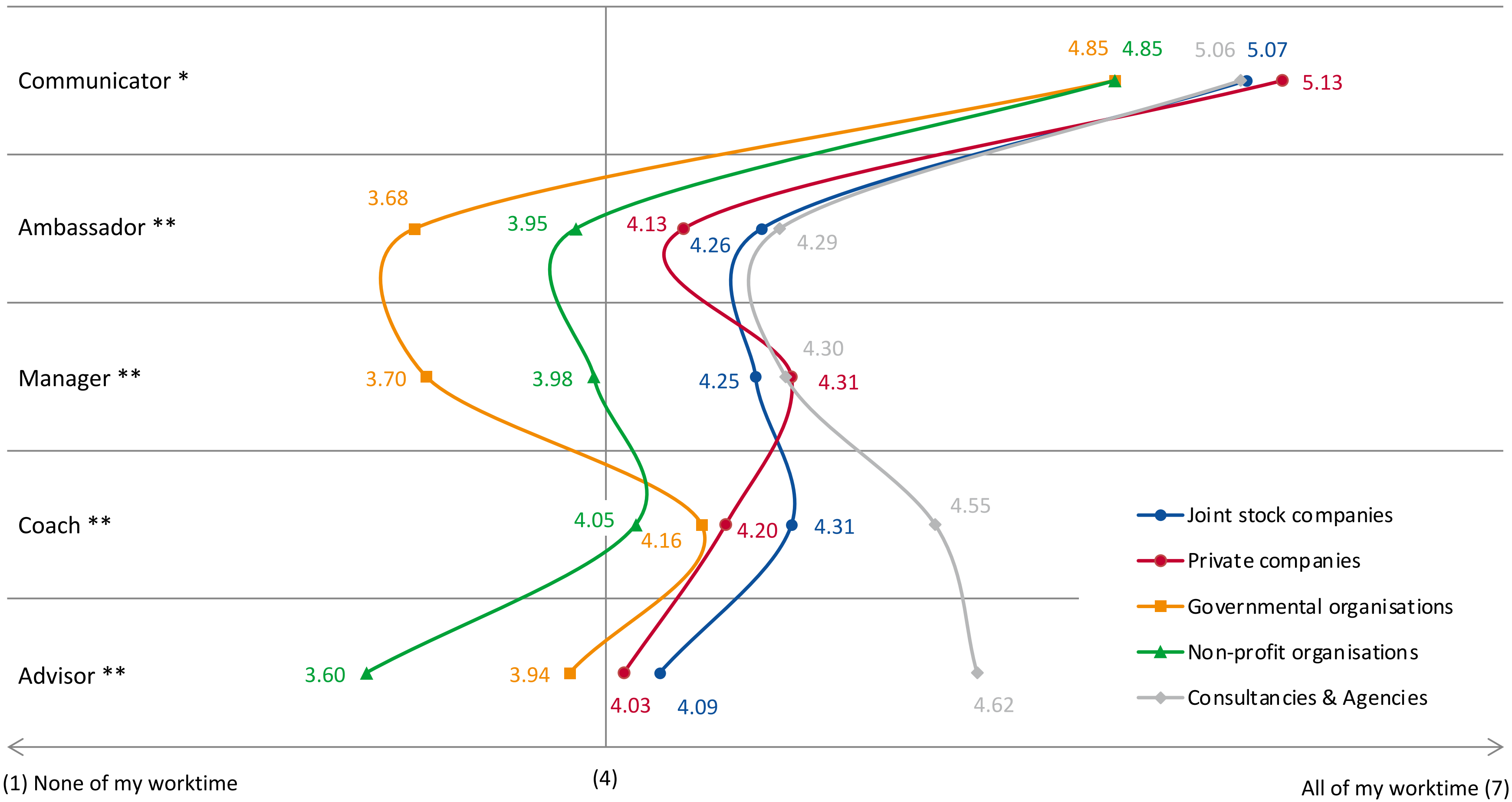
Worktime devoted to different roles



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,664 communication professionals. Q 15: Communication professionals deal with a broad variety of tasks and activities. Please consider your own role(s) within your communication department or agency in a typical week. How much of your worktime is usually devoted to the following roles? Scale 1 (None of my worktime) – 7 (All of my worktime). ** Highly significant (Pearson correlation, p < 0.01).

Managerial roles are enacted less often by practitioners working in non-profits; advisors and ambassadors are underrepresented in governmental organisations

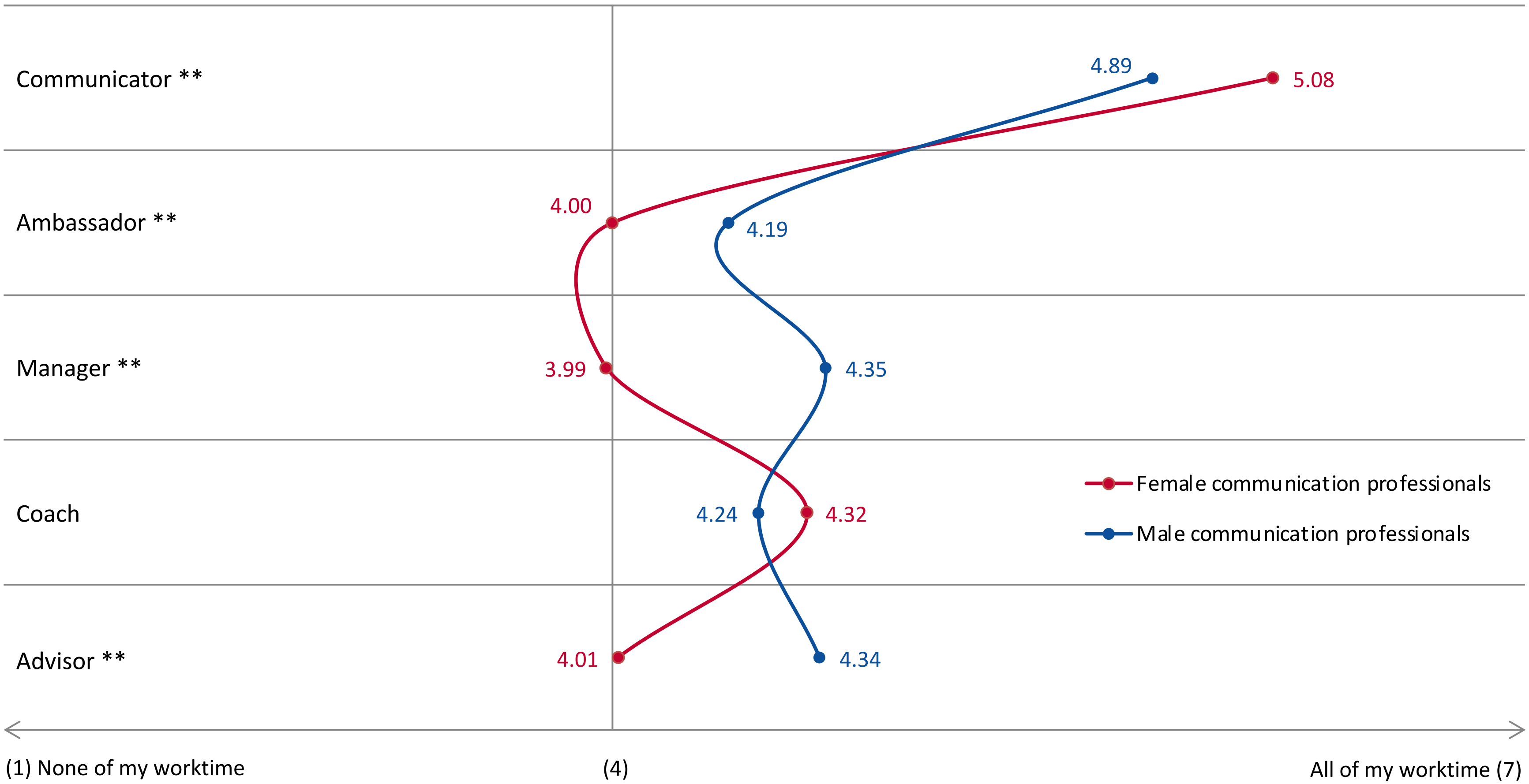
Worktime devoted to different roles



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,664 communication professionals. Q 15: Communication professionals deal with a broad variety of tasks and activities. Please consider your own role(s) within your communication department or agency in a typical week. How much of your worktime is usually devoted to the following roles? Scale 1 (None of my worktime) – 7 (All of my worktime). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01). * Significant differences (ANOVA, p ≤ 0.05).

Female practitioners devote more of their time to work as communicators; male professionals are strongly focused on managerial and advisory roles

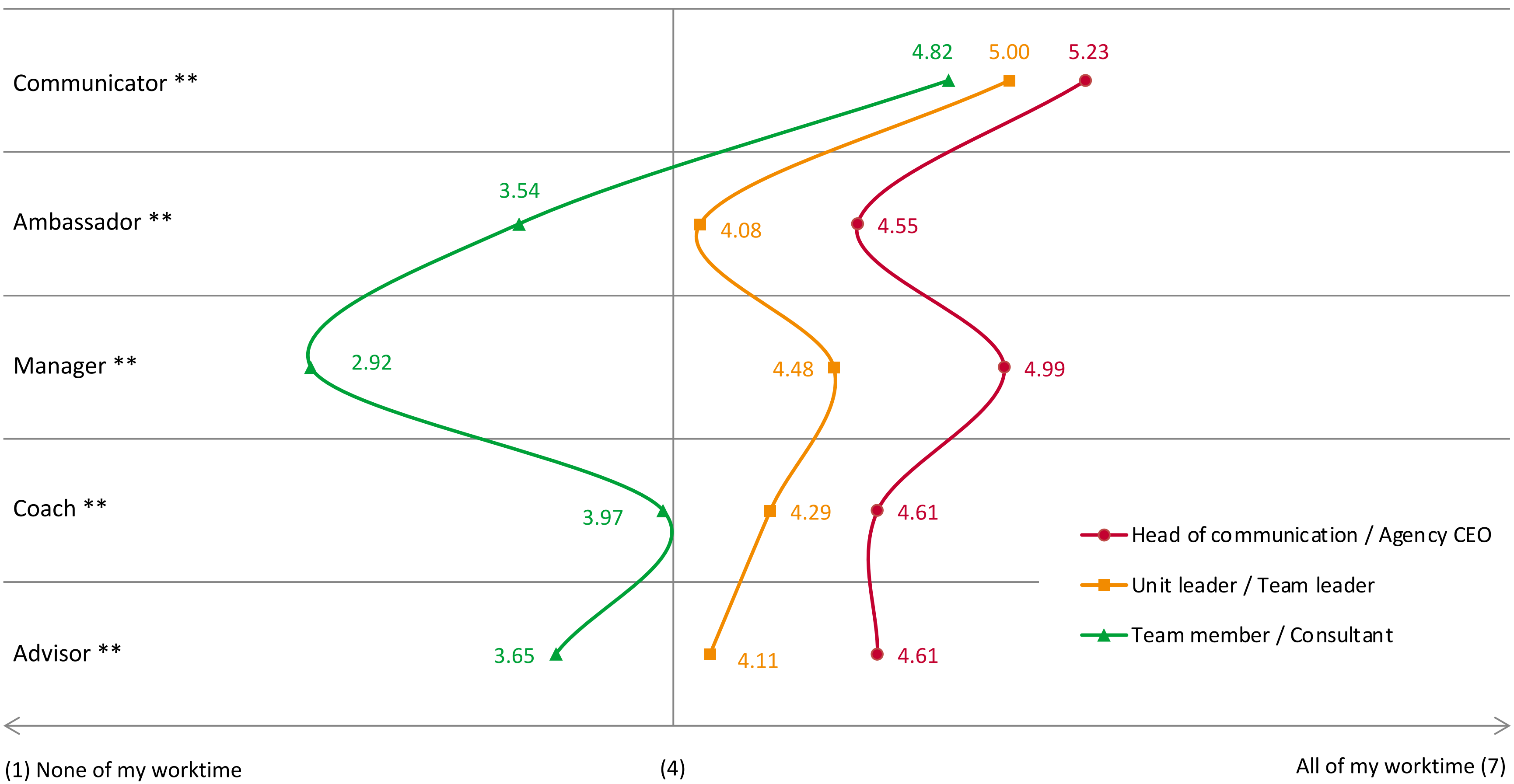
Worktime devoted to different roles



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,656 communication professionals. Q 15: Communication professionals deal with a broad variety of tasks and activities. Please consider your own role(s) within your communication department or agency in a typical week. How much of your worktime is usually devoted to the following roles? Scale 1 (None of my worktime) – 7 (All of my worktime). Mean values. ** Highly significant differences (independent samples T-Test, p ≤ 0.01).

Chief communication officers, agency heads and unit leaders are jack-of-all-trades and enact all roles more frequently

Worktime devoted to different roles



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,432 communication professionals. Q 15: Communication professionals deal with a broad variety of tasks and activities. Please consider your own role(s) within your communication department or agency in a typical week. How much of your worktime is usually devoted to the following roles? Scale 1 (None of my worktime) – 7 (All of my worktime). Mean values. ** Highly significant differences (Kendall rank correlation, p ≤ 0.01).

Role enactment of practitioners working in communication departments and agencies in key countries across Western and Northern Europe

	Communicator	Ambassador	Manager	Coach	Advisor
Germany	28.1%	15.2%	31.4%	20.5%	18.6%
Austria	39.1%	15.6%	34.4%	22.7%	20.3%
Switzerland	31.3%	18.1%	26.5%	28.9%	22.9%
France	39.1%	26.1%	30.4%	34.8%	23.9%
Belgium	35.6%	23.1%	29.8%	20.2%	23.1%
Netherlands	29.5%	15.2%	22.3%	25.9%	28.6%
United Kingdom	40.6%	27.7%	21.8%	26.7%	30.7%
Denmark	23.4%	7.8%	7.8%	20.8%	11.7%
Sweden	24.6%	16.4%	20.5%	21.1%	19.9%
Norway	25.0%	6.7%	12.5%	24.0%	15.4%
Finland	38.1%	16.2%	21.9%	22.9%	15.2%

www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,382 communication professionals from 22 countries. Q 15: Communication professionals deal with a broad variety of tasks and activities. Please consider your own role(s) within your communication department or agency in a typical week. How much of your worktime is usually devoted to the following roles? Scale 1 (None of my worktime) – 7 (All of my worktime). Frequencies based on scale points 6-7.

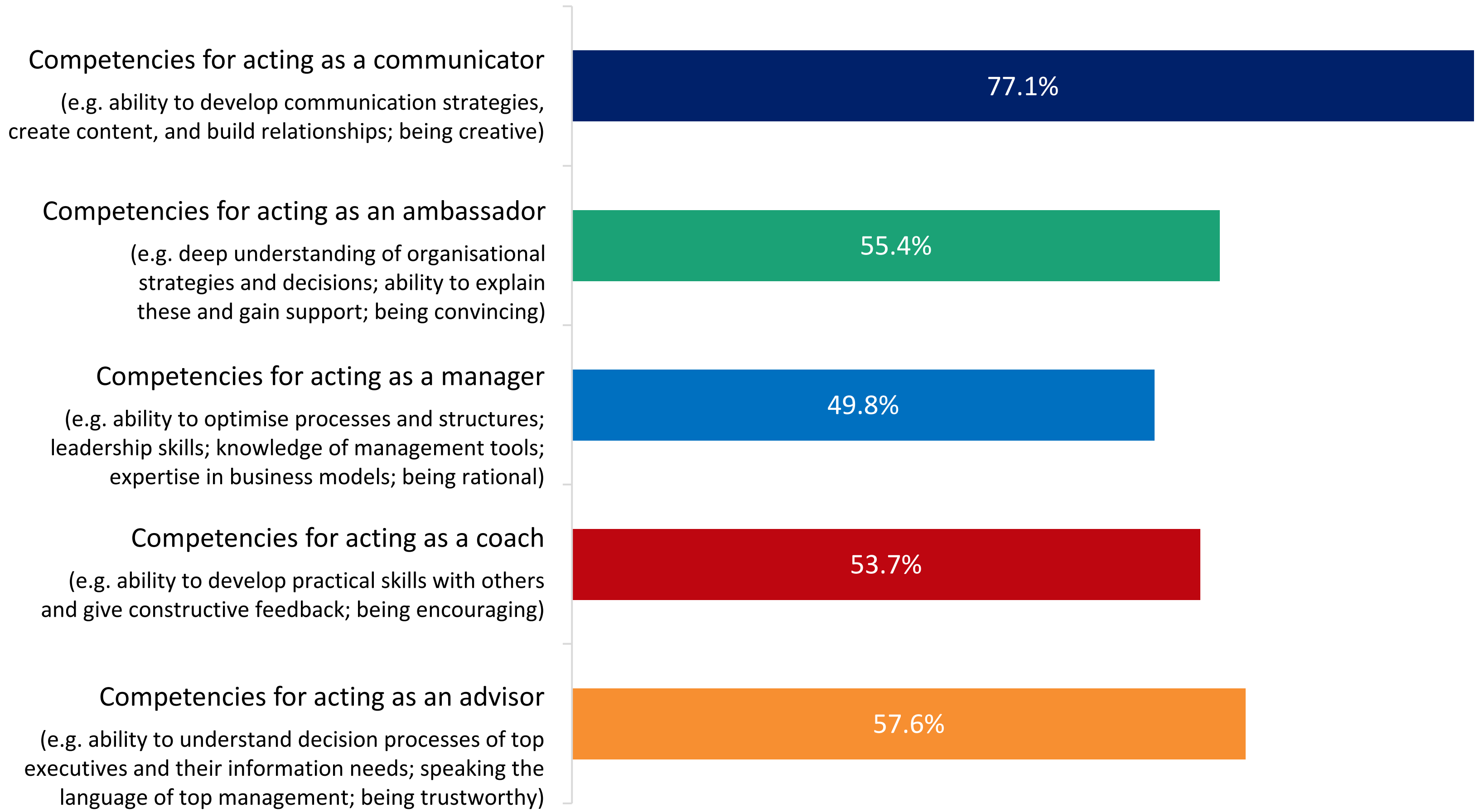
Role enactment of practitioners working in communication departments and agencies in key countries across Southern and Eastern Europe

	Communicator	Ambassador	Manager	Coach	Advisor
Spain	56.4%	24.5%	39.1%	24.5%	22.7%
Portugal	57.4%	35.2%	38.9%	31.5%	33.3%
Italy	46.1%	23.0%	34.5%	26.7%	22.0%
Slovenia	48.9%	23.9%	25.0%	25.0%	26.1%
Croatia	50.9%	34.5%	43.6%	47.3%	40.0%
Serbia	63.1%	41.5%	49.2%	43.1%	50.8%
Bosnia and Herzegovina	56.6%	38.9%	39.8%	35.4%	33.6%
Turkey	55.7%	45.4%	43.3%	49.5%	48.5%
Bulgaria	55.3%	27.7%	36.2%	28.7%	28.7%
Romania	50.9%	26.3%	33.5%	30.5%	25.7%
Russia	39.6%	28.3%	34.0%	15.1%	32.1%

www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,382 communication professionals from 22 countries. Q 15: Communication professionals deal with a broad variety of tasks and activities. Please consider your own role(s) within your communication department or agency in a typical week. How much of your worktime is usually devoted to the following roles? Scale 1 (None of my worktime) – 7 (All of my worktime). Frequencies based on scale points 6-7.

Competencies of communication practitioners: A majority are well equipped to speak on behalf of organisations, but one in two lack managerial skills

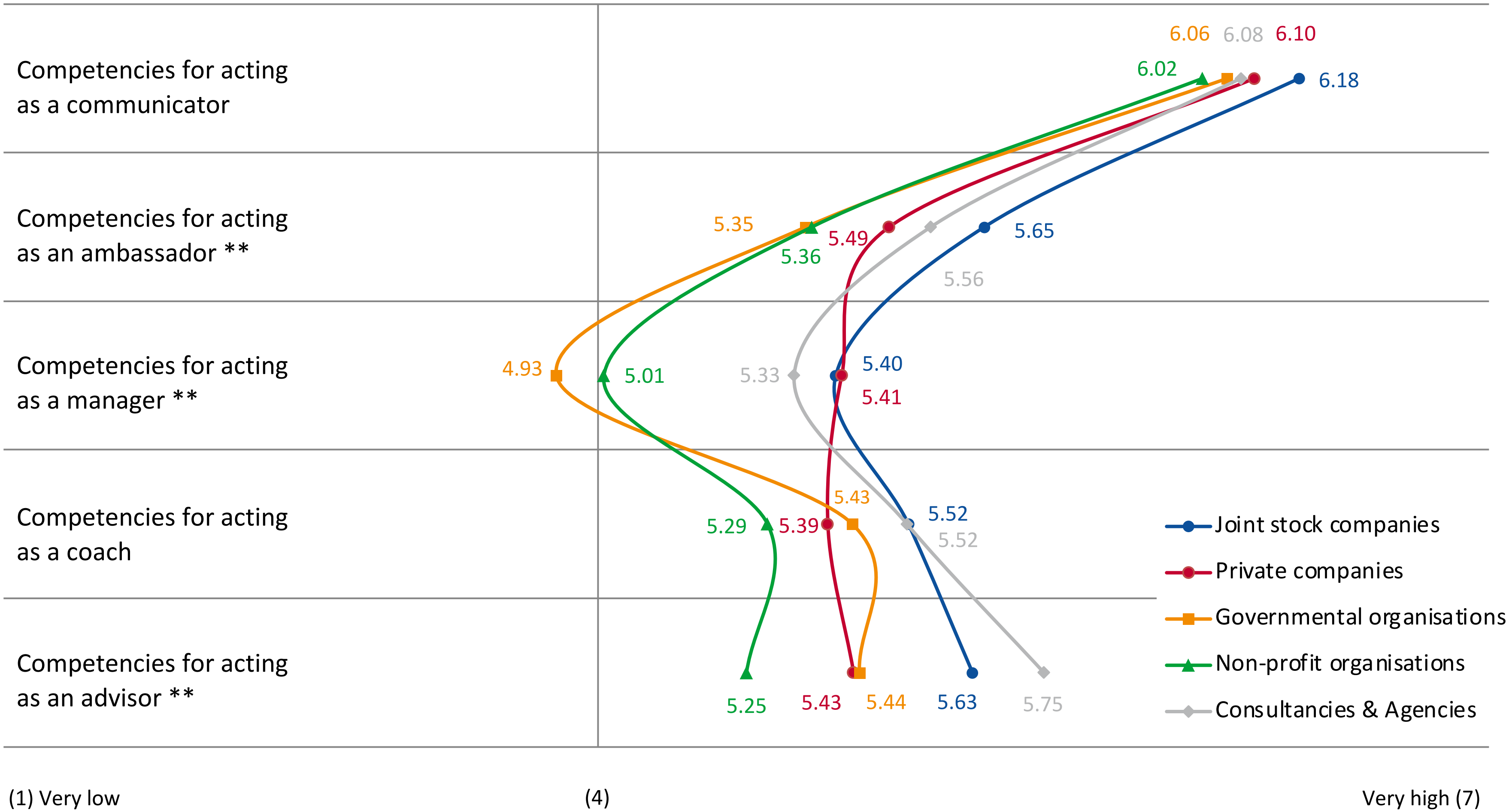
Competencies for different roles



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,664 communication professionals. Q 16: Different roles require particular knowledge, skills, and personal attributes. How do you rate your competencies for the following roles? Scale 1 (Very low) – 7 (Very high). Frequency based on scale points 6-7.

Practitioners working in joint stock companies and agencies report a higher level of competencies for all roles; professionals in non-profits are lagging behind

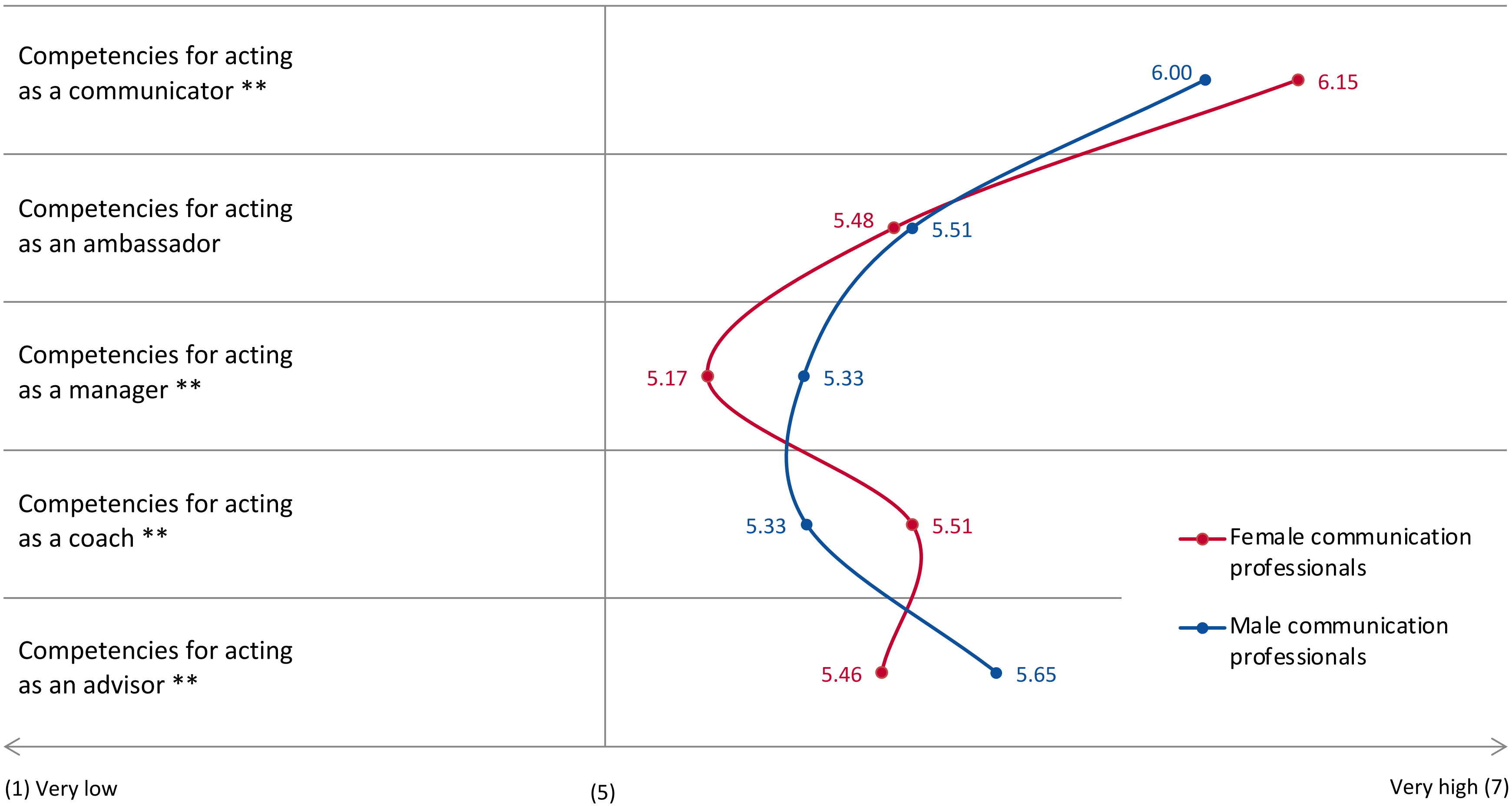
Competencies for different roles



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,664 communication professionals. Q 16: Different roles require particular knowledge, skills, and personal attributes. How do you rate your competencies for the following roles? Scale 1 (Very low) – 7 (Very high). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01).

Female practitioners perceive themselves more competent in communicating and coaching, while their male colleagues rate their advising and managing skills higher

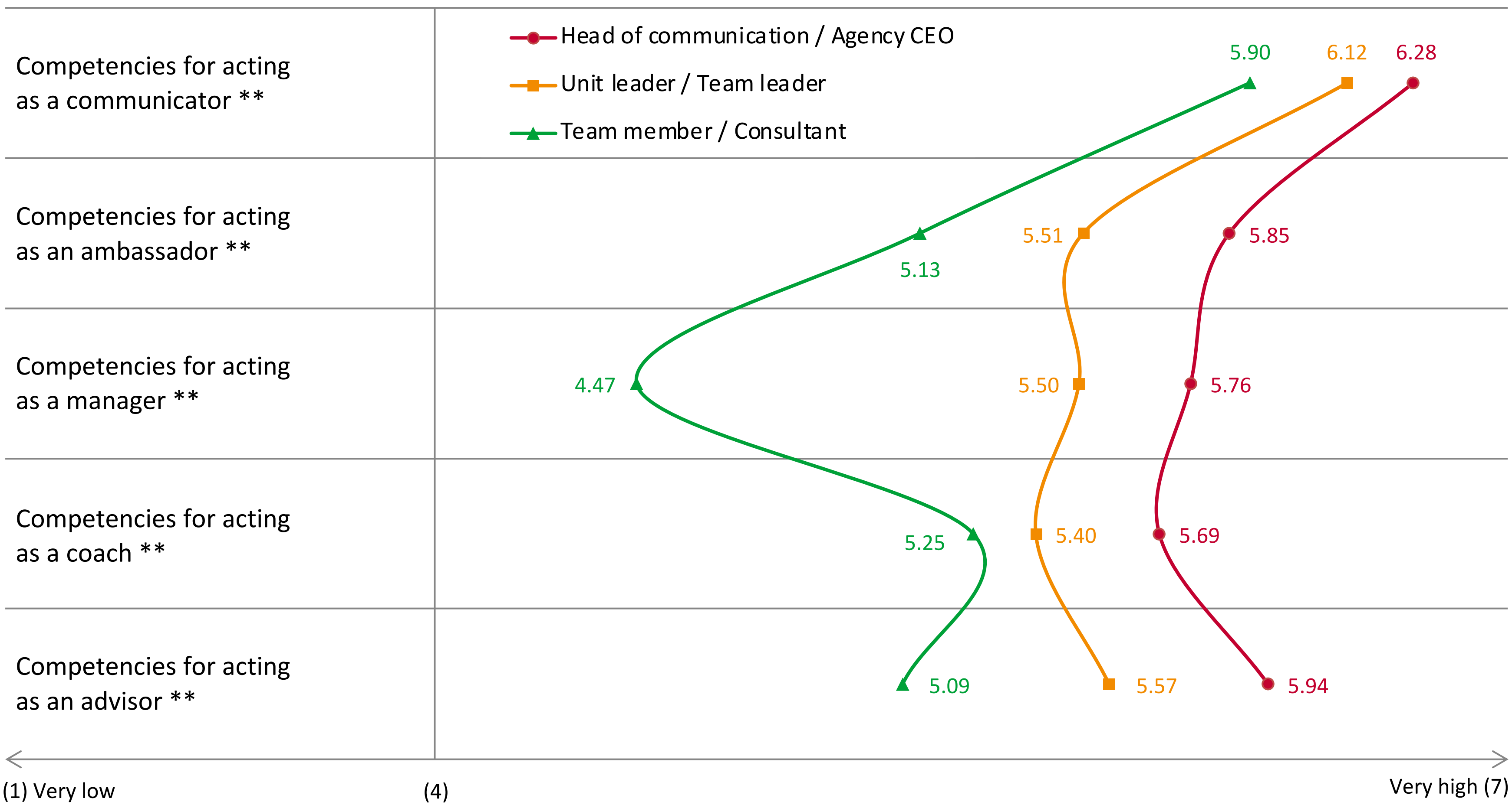
Competencies for different roles



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,656 communication professionals. Q 16: Different roles require particular knowledge, skills, and personal attributes. How do you rate your competencies for the following roles? Scale 1 (Very low) – 7 (Very high). Mean values. ** Highly significant differences (independent samples T-Test, p ≤ 0.01).

Communicators on upper levels rate their competencies higher for all roles – team members estimate their managerial skills comparatively low, as expected

Competencies for different roles



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,432 communication professionals. Q 16: Different roles require particular knowledge, skills, and personal attributes. How do you rate your competencies for the following roles? Scale 1 (Very low) – 7 (Very high). Mean values. ** Highly significant differences (Kendall rank correlation, p ≤ 0.01).

Competency levels of communication professionals across Western and Northern Europe

	Competencies for acting as a communicator	Competencies for acting as an ambassador	Competencies for acting as a manager	Competencies for acting as a coach	Competencies for acting as an advisor
Germany	76.2%	50.0%	52.9%	45.2%	57.1%
Austria	80.5%	53.9%	53.9%	52.3%	52.3%
Switzerland	85.5%	63.9%	55.4%	59.0%	65.1%
France	69.6%	50.0%	34.8%	47.8%	58.7%
Belgium	77.9%	51.9%	44.2%	52.9%	58.7%
Netherlands	71.4%	55.4%	32.1%	52.7%	62.5%
United Kingdom	84.2%	69.3%	54.5%	51.5%	69.3%
Denmark	88.3%	59.7%	36.4%	59.7%	71.4%
Sweden	75.4%	55.0%	37.4%	64.9%	54.4%
Norway	79.8%	51.9%	27.9%	54.8%	59.6%
Finland	80.0%	49.5%	43.8%	62.9%	53.2%

www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,382 communication professionals from 22 countries. Q 16: Different roles require particular knowledge, skills, and personal attributes. How do you rate your competencies for the following roles? Scale 1 (Very low) – 7 (Very high). Frequencies based on scale points 6-7.

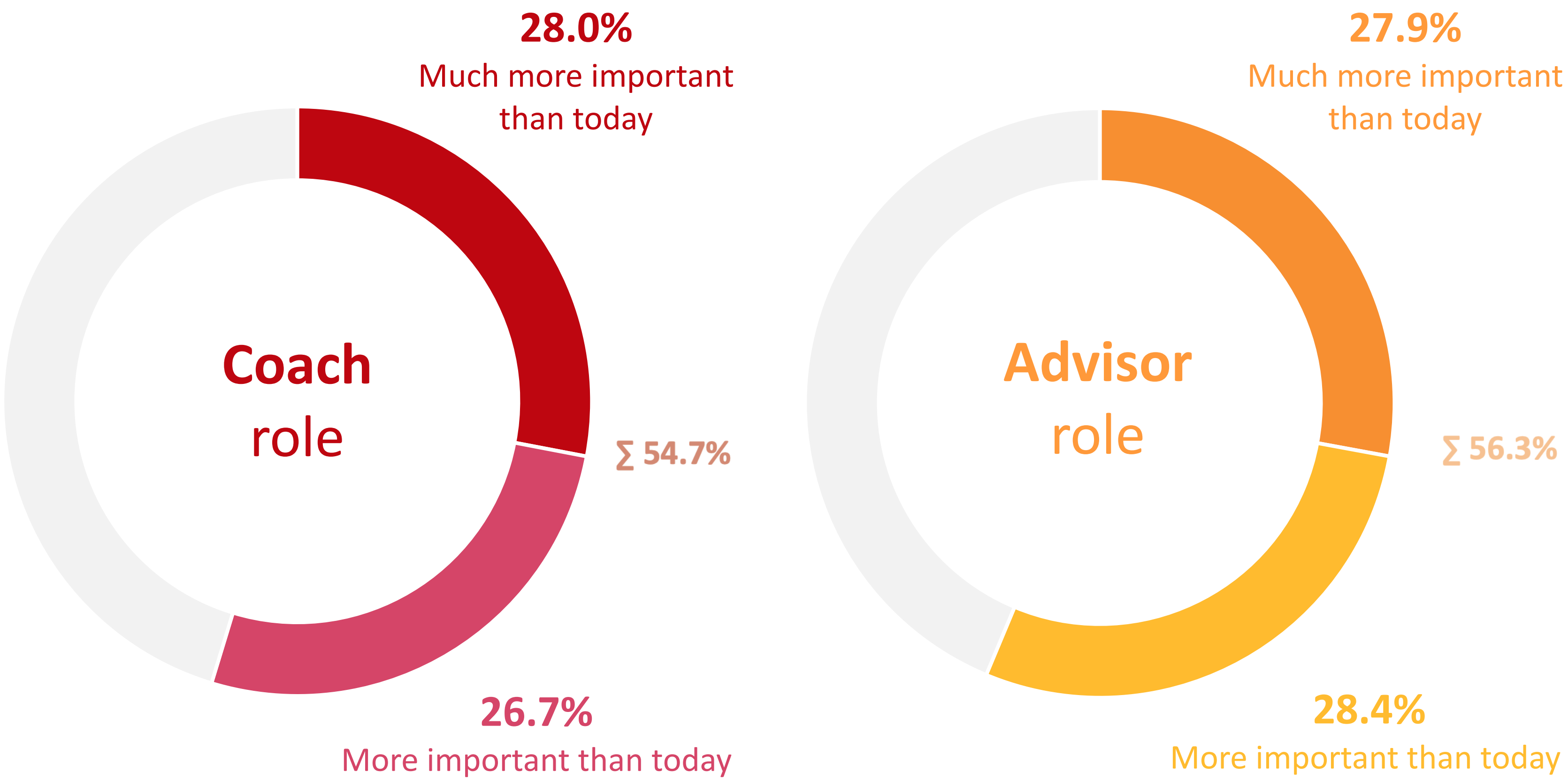
Competency levels of communication professionals across Southern and Eastern Europe

	Competencies for acting as a communicator	Competencies for acting as an ambassador	Competencies for acting as a manager	Competencies for acting as a coach	Competencies for acting as an advisor
Spain	83.6%	65.5%	55.5%	50.0%	54.5%
Portugal	81.5%	55.6%	57.4%	52.8%	60.2%
Italy	72.8%	49.7%	53.4%	50.8%	49.2%
Slovenia	70.5%	51.1%	40.9%	56.8%	60.2%
Croatia	78.2%	58.2%	56.4%	67.3%	63.6%
Serbia	81.5%	61.5%	67.7%	50.8%	63.1%
Bosnia and Herzegovina	73.5%	53.1%	61.1%	59.3%	57.5%
Turkey	78.4%	68.0%	64.9%	57.7%	68.0%
Bulgaria	84.0%	64.9%	57.4%	53.2%	70.2%
Romania	62.3%	44.3%	44.3%	47.9%	41.3%
Russia	62.3%	39.6%	60.4%	39.6%	39.6%

www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,382 communication professionals from 22 countries. Q 16: Different roles require particular knowledge, skills, and personal attributes. How do you rate your competencies for the following roles? Scale 1 (Very low) – 7 (Very high). Frequencies based on scale points 6-7.

A closer look at coaching and advising in communications: Both roles are expected to rise strongly in importance in the near future

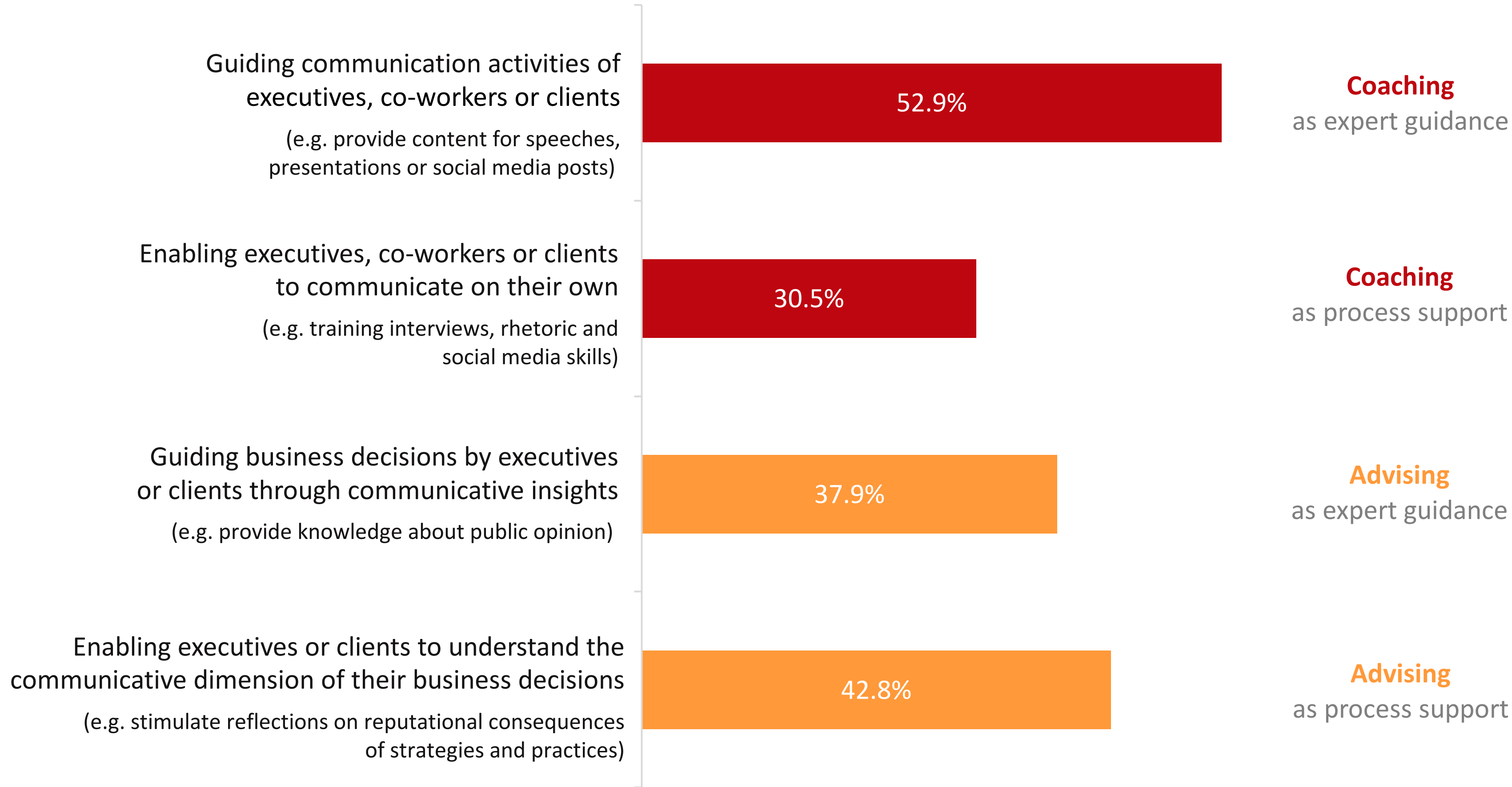
Changing importance of roles for communication practitioners in the next three years



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,664 communication professionals. Q 17: We'd like to focus a bit more on the coaching and advising roles. How important will these roles become in the next three years for yourself or for somebody else working in your current position? Scale 1 (Far less important than today) – 7 (Much more important than today).

How communicators act as coaches and advisors: they provide guidance based on professional expertise or enable others to improve themselves

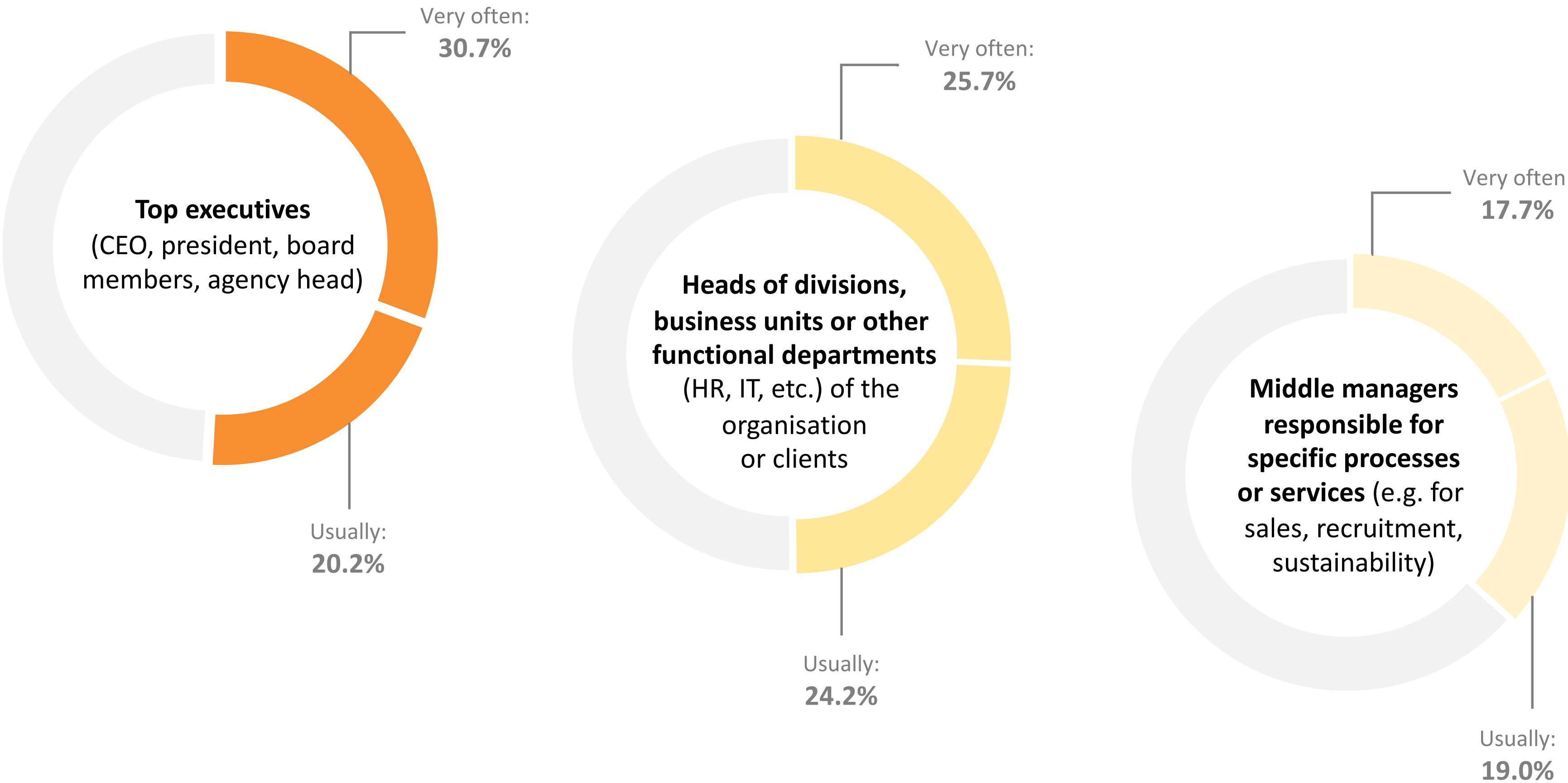
Coaching and advising practices



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,526 communication professionals. Q 18: When thinking about your roles as advisor or coach, how often do you perform the following activities? Scale 1 (Never) – 7 (Very often). Frequency based on scale points 6-7.

Recipients of business-related advice from communication professionals are mostly top managers; middle management is addressed less intensively

Executives in the organisation or at clients that are normally advised in their business decisions by communicators



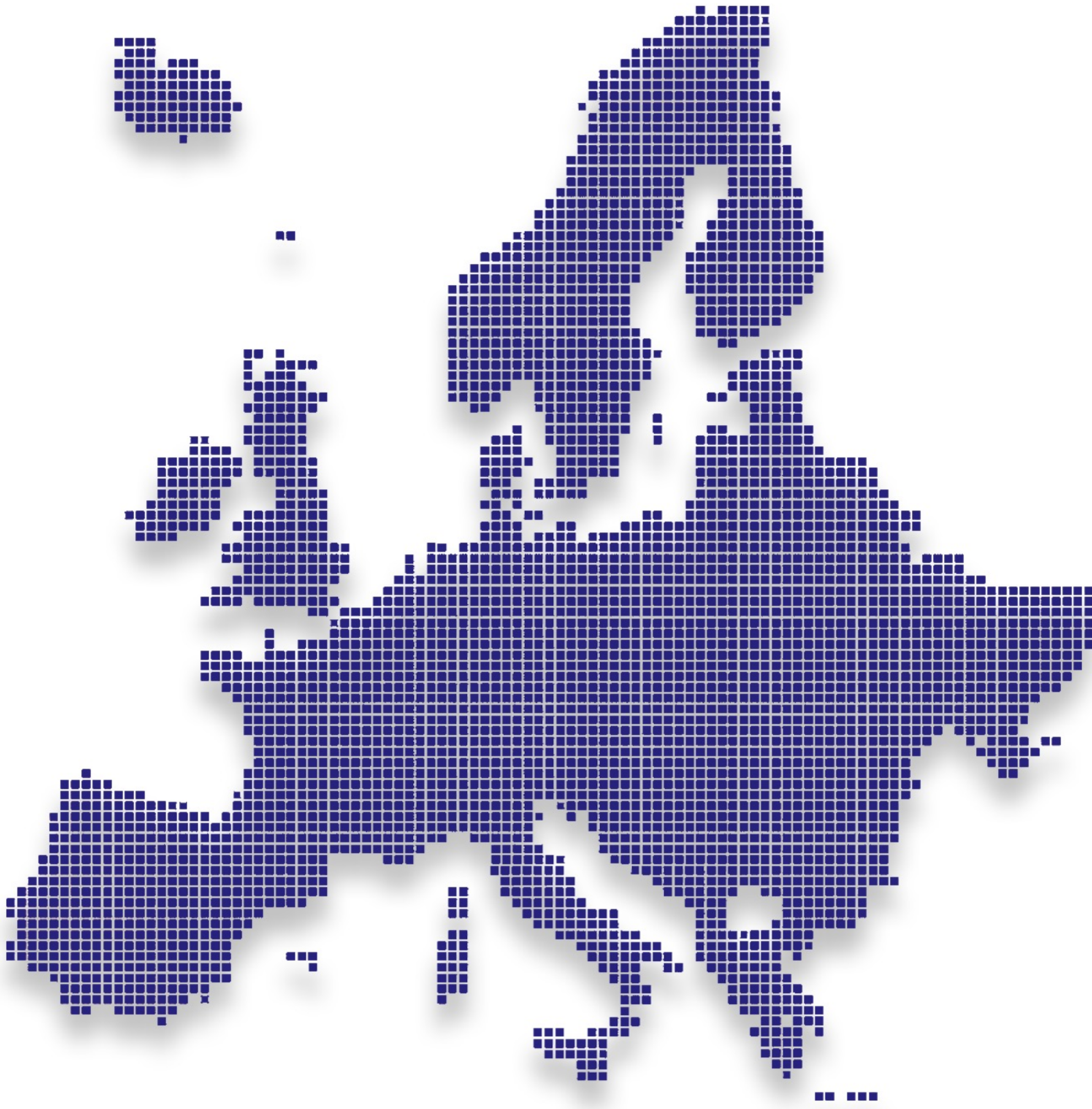
www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,664 communication professionals. Q 19: Which executives in your organisation or at your clients do you normally advise in their business decisions, either through communicative insights or by helping them to understand the communicative dimension of their jobs? Scale 1 (Never) – 7 (Very often). Percentages based on agreement for scale points 6 (Usually) or 7 (Very often).

Who tells the boss what to do? Profiles of communication practitioners who often advise top executives, heads of divisions/units, and middle managers

		Practitioners advising **top executives** (50.9% of the overall sample)	Practitioners advising **heads of divisions/units** (49.9% of the overall sample)	Practitioners advising **middle managers** (36.7% of the overall sample)	Overall sample
Gender	Female	57.8%	58.9%	65.0%	60.8%
	Male	42.1%	41.0%	34.9%	39.2%
Age	ø	45.9 years	45.4 years	43.6 years	43.8 years
Job experience	Up to 5 years	8.0%	9.5%	14.9%	15.7%
	6 to 10 years	11.8%	11.8%	13.9%	14.5%
	More than 10 years	80.3%	78.6%	71.2%	69.8%
Position	Head of comms / Agency CEO	52.2%	43.7%	32.6%	35.2%
	Unit leader / Team leader	24.1%	26.6%	30.9%	26.3%
	Team member / Consultant	17.5%	23.2%	30.0%	29.7%
Specialised training	Computer or data science, information technology	26.2%	27.4%	28.5%	27.3%
	Certified executive or personal coaching	25.4%	26.5%	27.4%	22.7%
	Strategic decision-making, management concepts	55.3%	53.4%	48.8%	47.0%
	Process analyses, business models, leadership essentials	37.2%	37.4%	36.4%	33.2%

www.communicationmonitor.eu / Zerfass et al. 2021 / n = 1,357 / 1,330 / 979 communication professionals who usually or very often advise the listed people, i.e. who ticked scale points 6 or 7 on item 1/2/3 of Q 19. Q 21, Q 28, Q29, Q30: Demographics, see p. 13-14. Q 32: Have you received specialised training in one or more of the following areas through continuing education courses or during your studies? Percentages based on agreement.

Strategic issues for the profession



Strategic issues for the profession

Building and maintaining trust is a top of mind issue among communication professonals in Europe for the fourth consecutive time in this annual study (Zerfass et al., 2018). This means that trust is expected to dominate the agenda of the profession at least until 2024: 38.9 per cent of respondents named it when being asked about the most important issues for communication management in this period. Gaining trust is perceived as most important by governmental organisations (43.6%) and least important by non-profits. The more operational issue of exploring new ways for creating and distributing content is ranked second by practitioners (32.4%) with similar assessments across sectors. This issue made a big leap in the list; it was ranked sixth last year (Zerfass et al., 2020). Dealing with sustainable development and social responsibility dropped by six points to 31.3 per cent overall. Here again, the study reveals large differences with a high 37.0 per cent support in companies at the top end and 22.5 per cent in governmental organisations at the bottom – which is surprising considering the European Union‘s agenda for a green, digital and circular continent. This paradox has been already noted in previous ECM studies.

Since we have been tracking some of the key issues for the future of the profession since 2007, we can observe trends extending for 15 years (Zerfass et al., 2007). We are reporting longitudinal developments for five issues. The most important one in 2007 was coping with the digital evolution and the social web. From 48.9 per cent in 2007 it even climbed to 54.9 per cent in 2011, but since then it is declining. In 2021 it fell to one of the last ranks with only 21.7 per cent of respondents considering it a key issue for communication management in the next three years. The logical explanation for this decline is that communicating online is an integral part of daily work for communicators across Europe today. They don't see it as a major issue any more. However, strengthening the digital infrastructure to make online and other communications happen and algorithms are considered big challenges in the near future (see also pages 17–29).

A similar development can be seen for the challenge of matching the need to address more audiences and channels with limited resources. It was considered a top three priority by 33.8 per cent of communication professionals in Europe a decade ago (Zerfass et al., 2012) but its trend is going down with 24.4 per cent seeing the relevance in 2021. Again, we interpret this as institutional progress – something that has been described for communication management in general (Grandien & Johanson, 2012), but also applies for dealing with specific challenges.

Trust as well as sustainability and social responsibility – already mentioned above – have experienced turbulent rides. This means that assessments by practitioners in the field have clearly changed over time. Generally speaking, trust-building was always considered important by three or four out of ten communicators, while social and environmental aspects have received considerably less attention for many years between 2012 and 2019. The issue has risen again in importance again during the last two years.

The fifth strategic topic we are following since 2007 is linking business strategy and communication. It was continuously ranked as a top three issue by more than 40 per cent of the respondents until 2016, and performed very strongly at more than 37 per cent until 2019. Surprisingly the topic was valued less relevant in the two following years. Now, creating value through communications and proving it is in the top ranks again with 30.5 per cent focusing on it. Economic turbulences related to the pandemic will probably perpetuate this trend.

Most important strategic issues for communication management until 2024

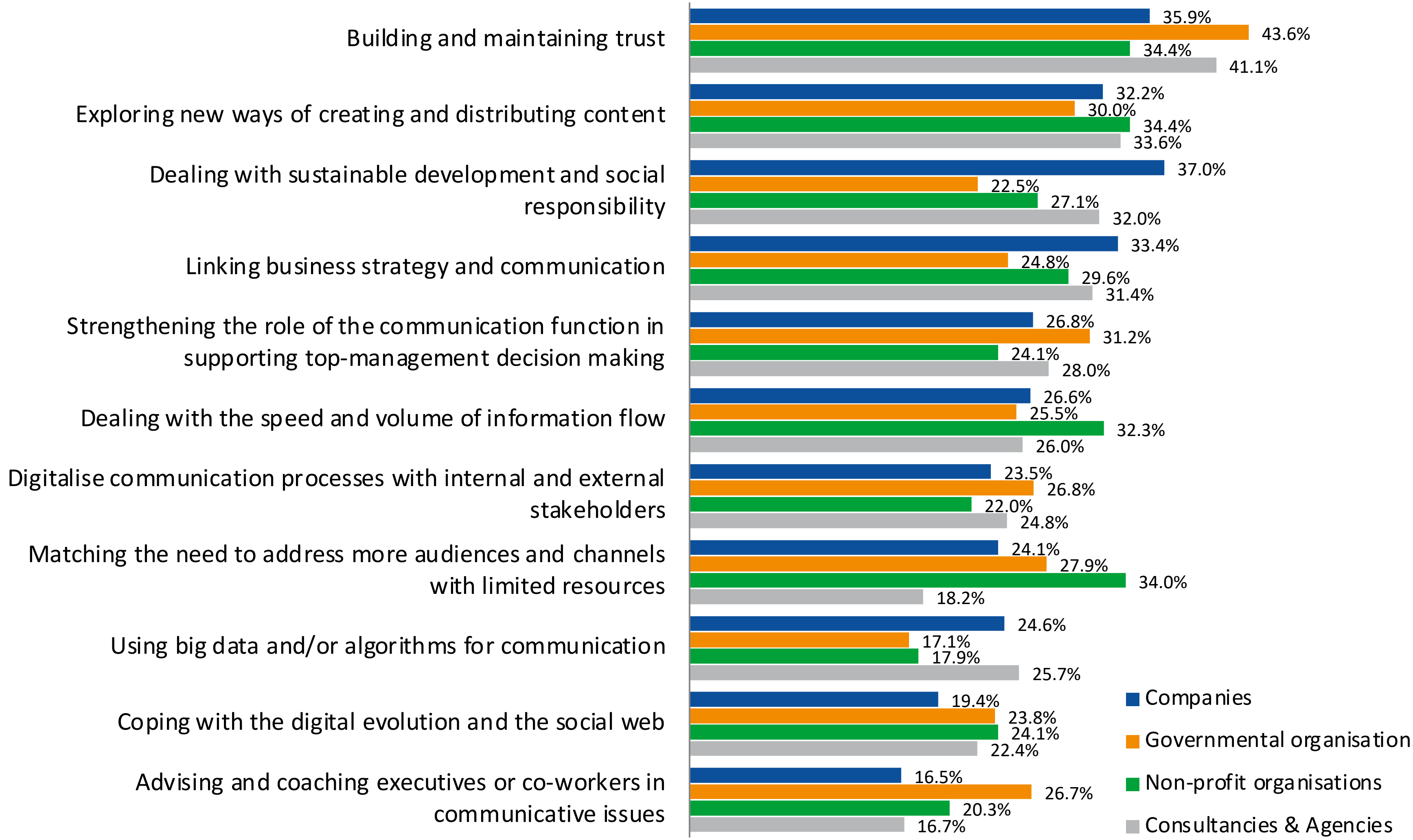
www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,664 communication professionals. Q 14: Which issues will be most important for PR / communication management within the next three years from your point of view? Please pick exactly 3 items. Frequency based on selection as Top-3 issue.

Country-to-country relevance of top three issues for communication management

	Building and maintaining trust	Exploring new ways of creating and distributing content	Dealing with sustainable development and social responsibility		Building and maintaining trust	Exploring new ways of creating and distributing content	Dealing with sustainable development and social responsibility
Germany	32.9%	25.2%	31.4%	Spain	40.0%	31.8%	39.1%
Austria	39.1%	31.3%	36.7%	Portugal	43.5%	34.3%	28.7%
Switzerland	31.3%	18.1%	28.9%	Italy	38.2%	35.6%	41.4%
France	41.3%	41.3%	47.8%	Slovenia	47.7%	35.2%	26.1%
Belgium	45.2%	29.8%	26.9%	Croatia	32.7%	38.2%	27.3%
Netherlands	49.1%	31.3%	23.2%	Serbia	38.5%	38.5%	30.8%
United Kingdom	45.5%	30.7%	39.6%	Bosnia and Herzegovina	43.4%	39.8%	23.0%
Denmark	39.0%	23.4%	31.2%	Turkey	22.7%	47.4%	43.3%
Sweden	40.9%	27.5%	22.2%	Bulgaria	40.4%	33.0%	25.5%
Norway	33.7%	28.8%	36.5%	Romania	41.3%	43.1%	28.7%
Finland	44.8%	18.1%	37.1%	Russia	24.5%	35.8%	22.6%

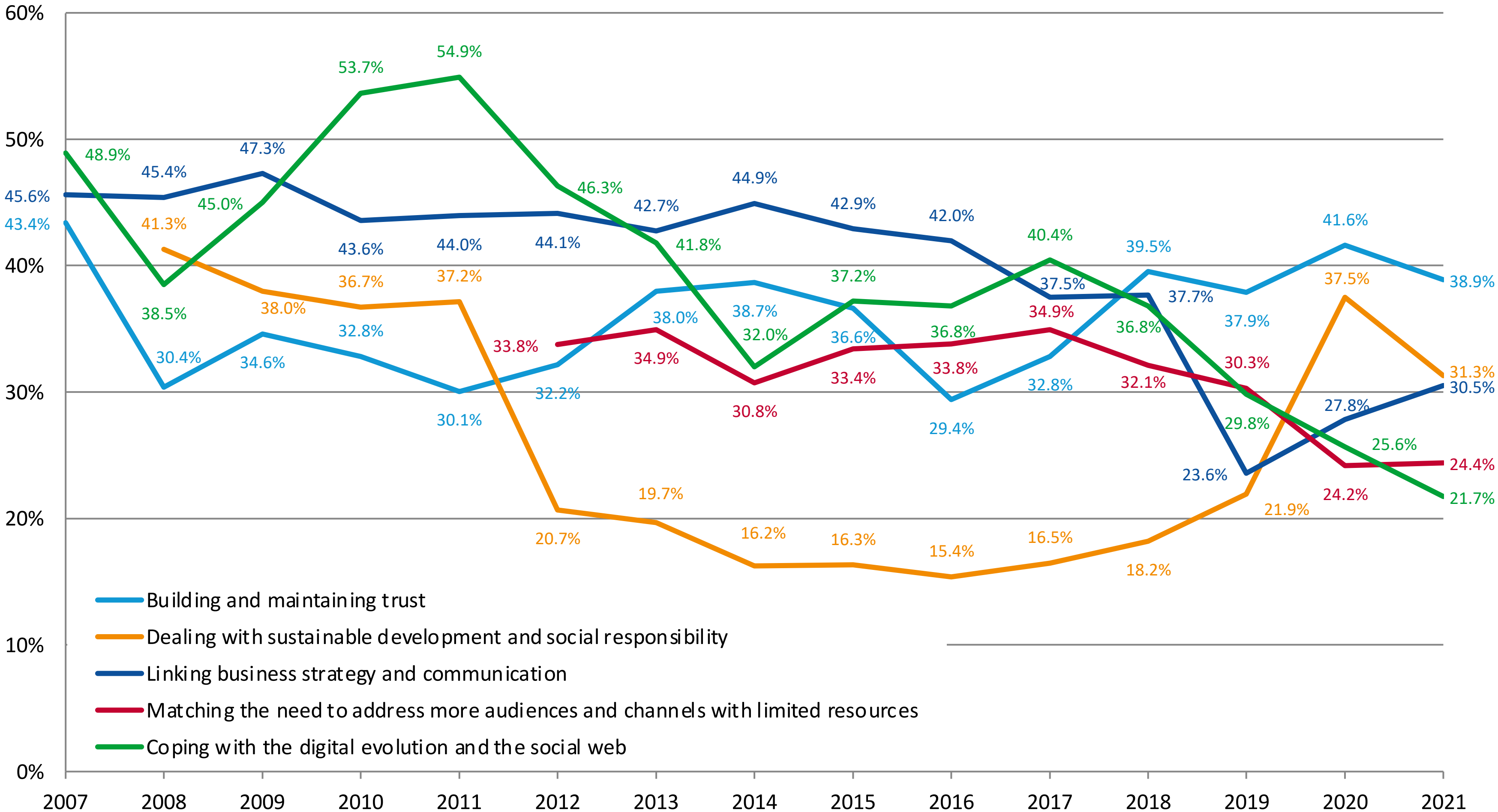
www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,382 communication professionals from 22 countries. Q 14: Which issues will be most important for PR / communication management within the next three years from your point of view? Please pick exactly 3 items. Frequency based on selection as Top-3 issue.

Relevance of strategic issues differs between types of organisations



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,664 communication professionals. Q 14: Which issues will be most important for PR / communication management within the next three years from your point of view? Please pick exactly 3 items. Frequency based on selection as Top-3 issue.

Long-term development of strategic issues for communication management



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,664 communication professionals (Q 14); Zerfass et al. 2020 / n = 2,324 (Q 12); Zerfass et al. 2019 / n = 2,689 (Q 8); Zerfass et al. 2018 / n = 3,096 (Q 6); Zerfass et al. 2017 / n = 3,387 (Q 5); Zerfass et al. 2016 / n = 2,710 (Q 9); Zerfass et al. 2015 / n = 2,253 (Q 5); Zerfass et al. 2014 / n = 2,777 (Q 16); Zerfass et al. 2013 / n = 2,710 (Q 6); Zerfass et al. 2012 / n = 2,185 (Q 9); Zerfass et al. 2011 / n = 2,209 (Q 6); Zerfass et al. 2010 / n= 1,955 (Q 7); Zerfass et al. 2009 / n = 1,863 (Q 12); Zerfass et al. 2008 / n = 1,524 (Q 6); Zerfass et al. 2007 / n = 1,087 (Q 6). Q: Which issues will be most important for communication management/PR within the next three years from your point of view? Pick exactly 3 items. Frequency: selection as Top-3 issue.

Salaries

Salaries

Every year this study collects data on salaries for communication professionals across Europe. Results show a consistent picture for different categories and regions across the continent. Salary bands have remained almost stable since 2009, with variations reflecting overall economic developments, differences in economic status within and between countries, and changes in the composition of respondents in the annual sample.

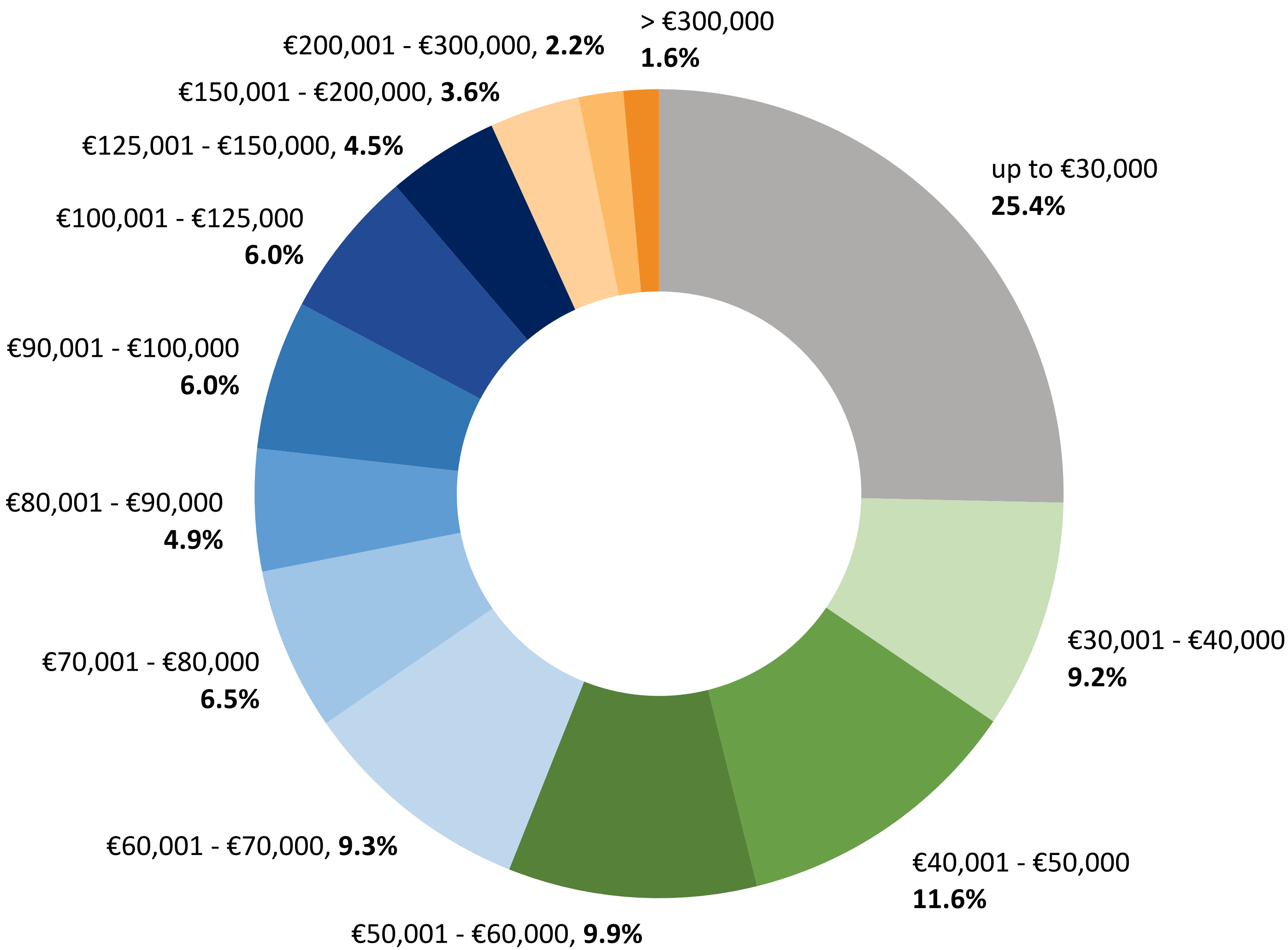
Like in previous editions of the European Communication Monitor, the data reported here covers key variables of gender, organisational position and type of organisation as well as longitudinal evolution and country by country comparisons between salary rates. Results are based on a large sample of up to 2,193 professionals who agreed to disclose their personal income. In 2021, nearly one in five respondents (17.9%) earn more than €100,000 per year. A small top group – only 1.6 per cent of the sample – earns over €300,000, exactly the same percentage as last year. On the other hand, every third respondent (30.7%) makes between €30,001 and €60,000 per year, whilst a quarter (25.4%) earns up to €30,000, which has also not changed much compared to previous years. A similar cohort (26.7%) remains in the middle with an annual income between €50,001 and €100,000.

Compensation differs consistently between ranks as well. Annual salaries for top-level communicators are divided into thirds: top-level communicators earning over €100,000 (32.1%), those earning between €60,001 to €100,000 (30.6%) and the last third earning up to €60,000 (37.2%). Most team leaders and members (34.6 per cent) receive between €30,001 and €60,000 per year, while only 2.8 per cent make over €150,000, compared to 13.9 per cent of top-level communicators' salaries exceeding this amount.

In the previous years, salaries for different types of organisations showed that consultancies and agencies had the most employees in both the lowest and the highest pay ranges (Zerfass et al., 2012; Zerfass et al., 2020). In 2021 the largest share of practitioners reporting the lowest annual income are working in private companies. Those serving in communication departments of joint stock companies have taken the lead for all the salary bands over €80,000. The data are also consistent with longitudinal analysis and literature on the gender pay gap (Topić et al., 2020; Zerfass et al., 2020). Salaries reported by female practitioners are lower compared to male communicators, both for top positions and other hierarchical levels. Not even one out of ten female heads of communications or agency CEOs earns more than €150,000, while the 18.4 per cent of their male peers do.

Ever since the European Communication Monitor reported salaries across the continent, pay is higher in Northern and Western Europe. Switzerland is, by far, the country where communicators earn most with almost one out of two making more than €150,000 per year. The United Kingdom (17.6%), France (15.9%) and Germany (13.9%) are additional countries with a good share of high salaries. However, there are no respondents in this salary group in Croatia, Serbia, and Bosnia-Herzegovina. Conversely, there are no reported salaries under €30,001 in Switzerland and the Netherlands. These figures reflect the large variation of average salaries and living costs in the 22 countries analysed (Eurostat, 2021). At the same time, a general reduction of income for communication professionals due to the pandemic or shrinking economies drop is not noticeable across Europe so far (DataEuropaEU, 2020).

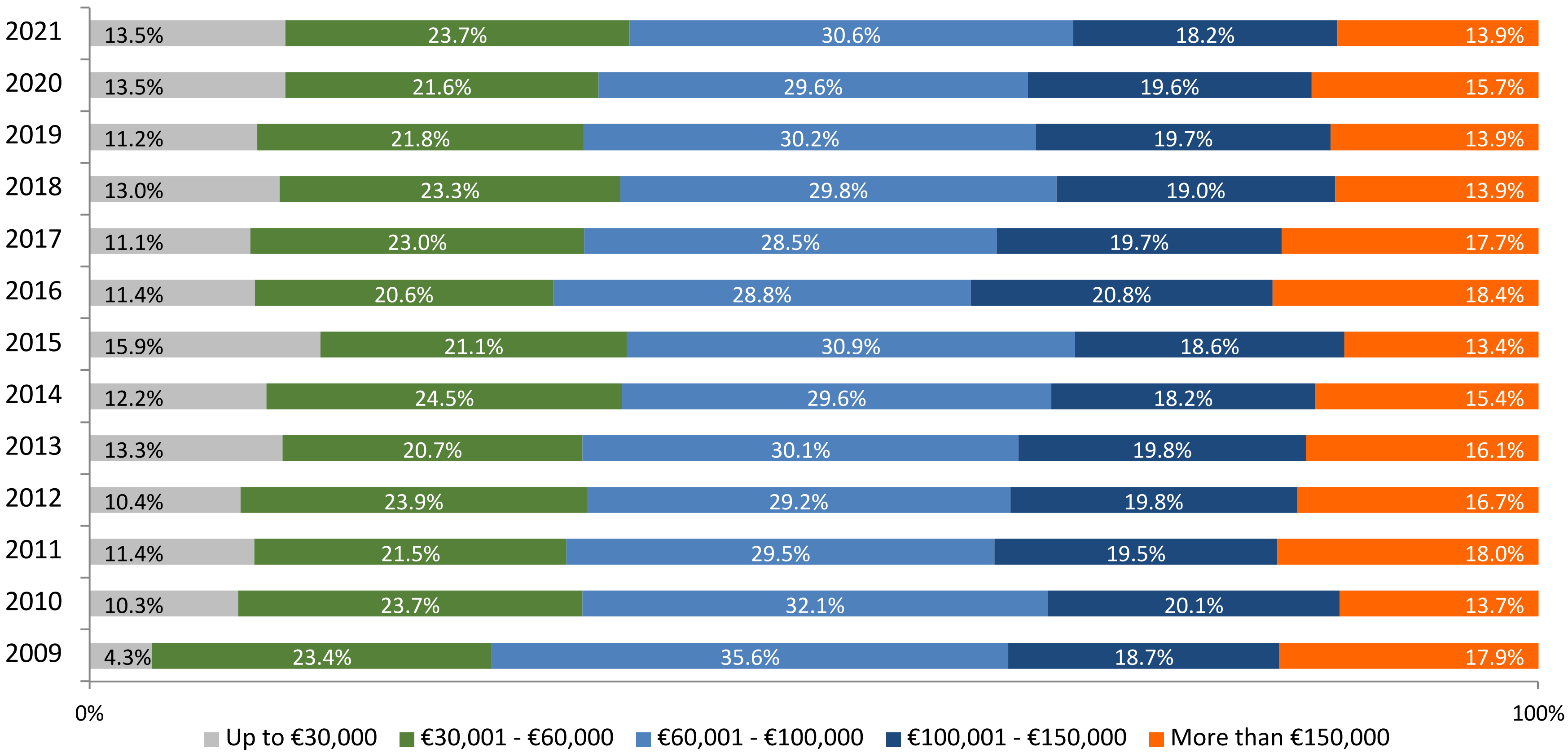
Basic annual salary of communication practitioners in Europe 2021



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,193 communication professionals. Q 37: In which of the following bands does your basic annual salary fall?

Longitudinal tracking of top level communicators' salaries in Europe

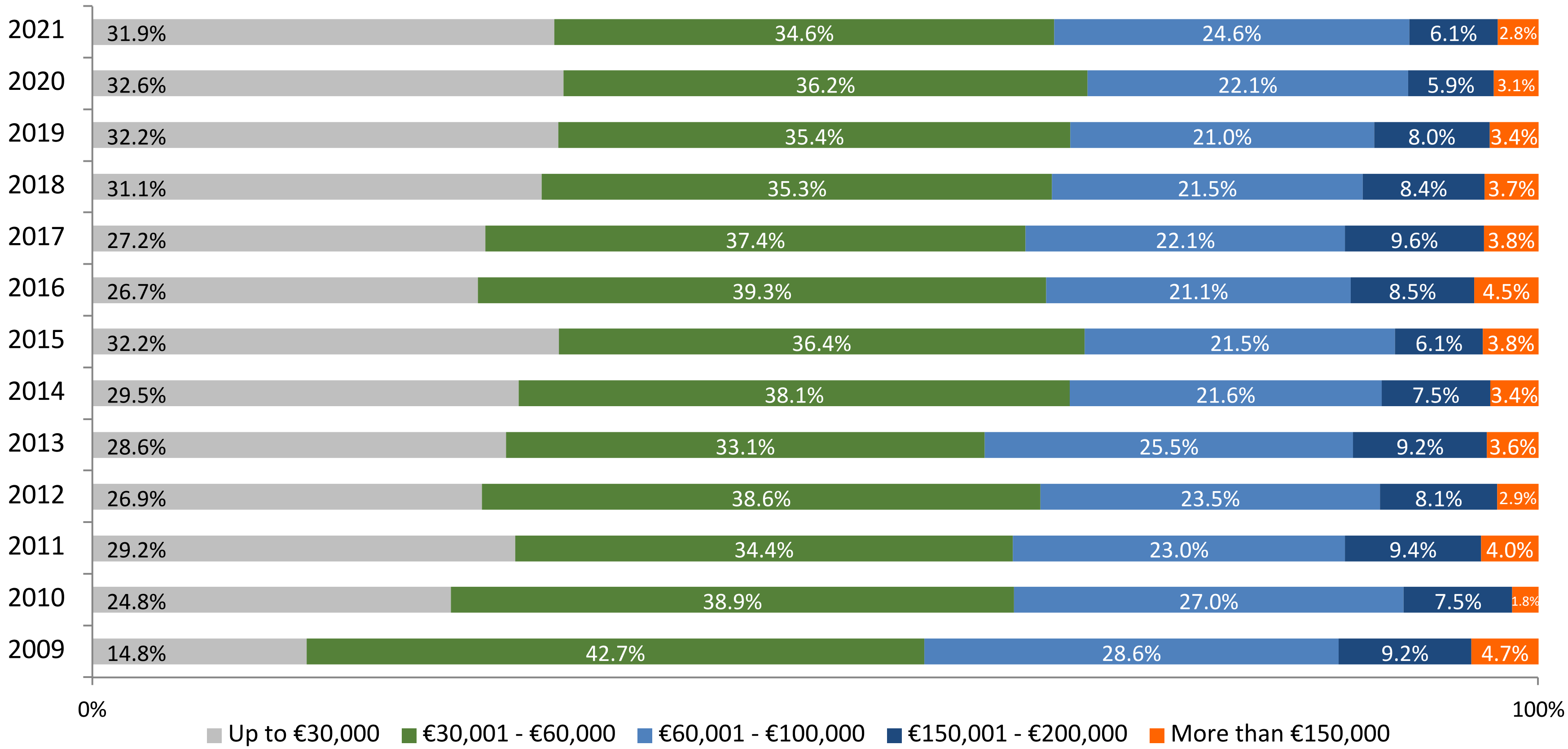
Basic annual salary (Heads of communication departments and agency CEOs)



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 784 heads of communication and agency CEOs (Q 37); Zerfass et al. 2020 / n = 689 (Q 36); Zerfass et al. 2019 / n = 857 (Q 34); Zerfass et al. 2018 / n = 941 (Q 37); Zerfass et al. 2017 / n = 1,099 (Q 31); Zerfass et al. 2016 / n = 860 (Q 32); Zerfass et al. 2015 / n = 828 (Q 33); Zerfass et al. 2014 / n = 966 (Q 41); Zerfass et al. 2013 / n = 970 (Q 17); Zerfass et al. 2012 / n = 798 (Q 39); Zerfass et al. 2011 / n = 887 (Q 20); Zerfass et al. 2010 / n = 809 (Q 19); Zerfass et al. 2009 / n = 951 (Q 17). Q: 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

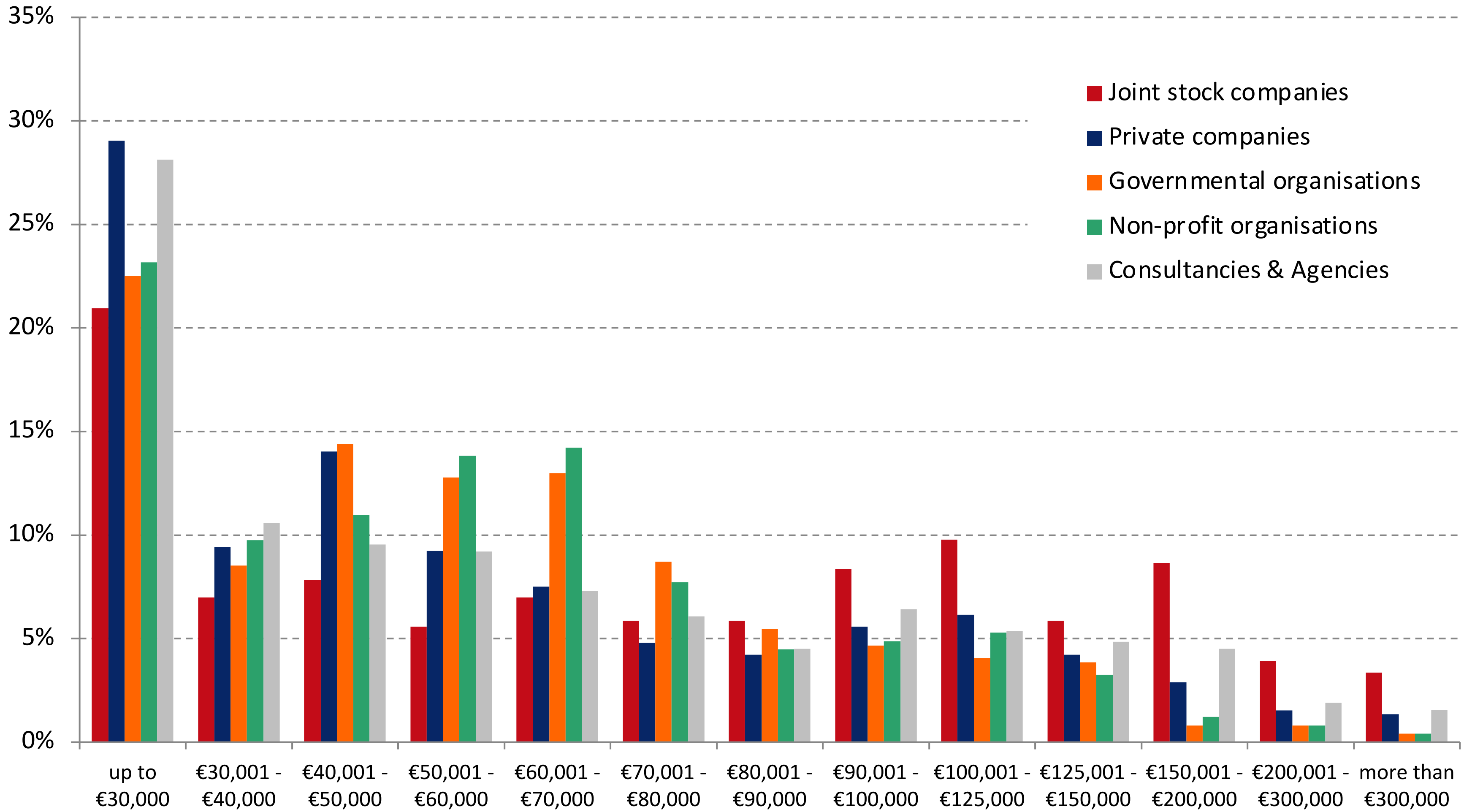
Basic annual salary (Unit leaders, team leaders, team members, consultants)



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 1,409 communication professionals below the top level of the hierarchy (Q 37); Zerfass et al. 2020 / n = 1,228 (Q 36); Zerfass et al. 2019 / n = 1,266 (Q 34); Zerfass et al. 2018 / n = 1,602 (Q 37); Zerfass et al. 2017 / n = 1,793 (Q 31); 2016 / n = 1,433 (Q 32); Zerfass et al. 2015 / n = 1,067 (Q 33); Zerfass et al. 2014 / n = 1,428 (Q 41); Zerfass et al. 2013 / n = 1,287 (Q 17); Zerfass et al. 2012 / n = 1,013 (Q 39); Zerfass et al. 2011 / n = 927 (Q 20); Zerfass et al. 2010 / n = 879 (Q 19); Zerfass et al. 2009 / n = 817 (Q 17). Q: 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.

Annual salaries in different types of organisation

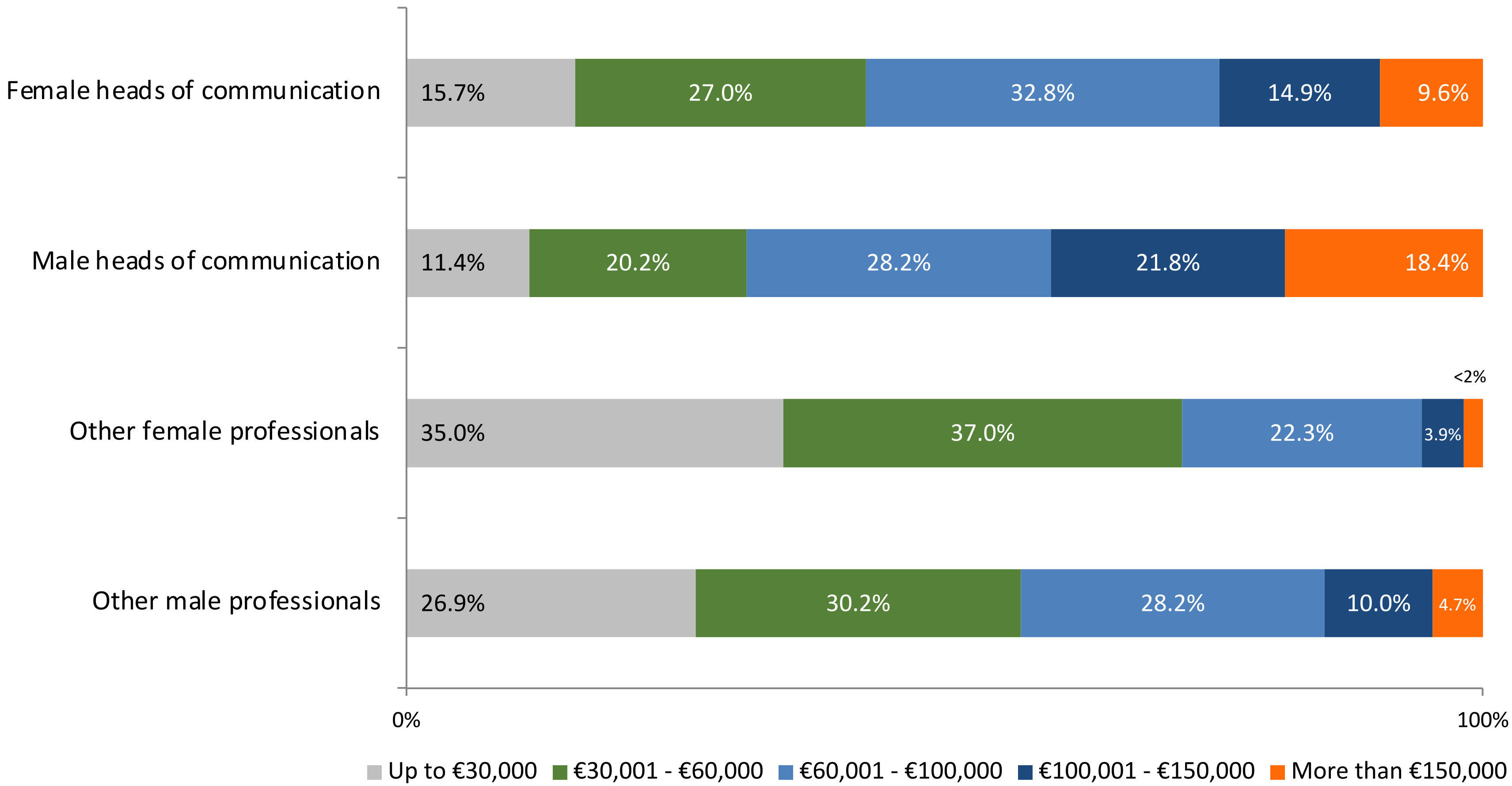
Basic annual salary (all communication practitioners)



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,193 communication professionals. Q 37: In which of the following bands does your basic annual salary fall?

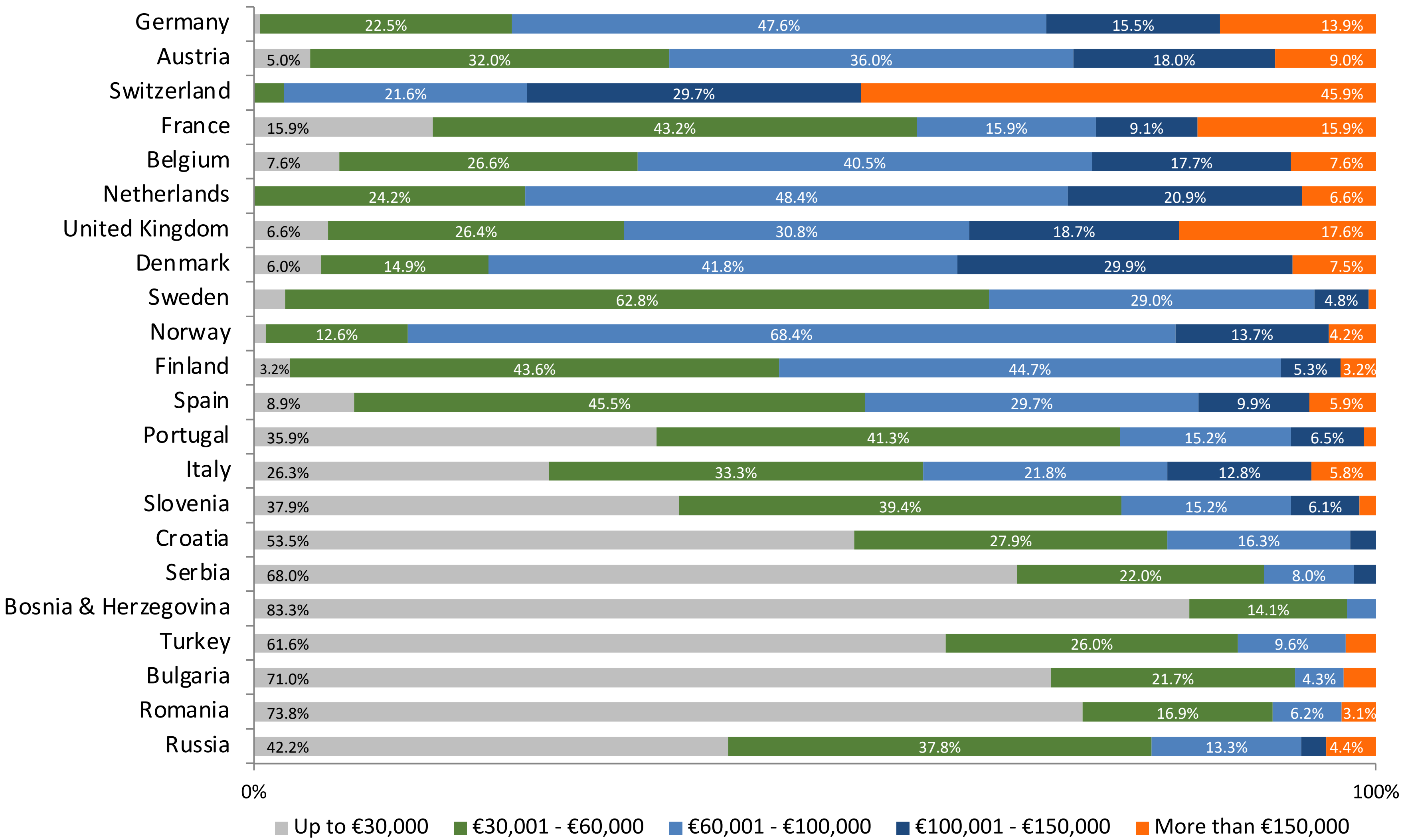
Salary differences between female and male practitioners

Basic annual salary (all communication practitioners)



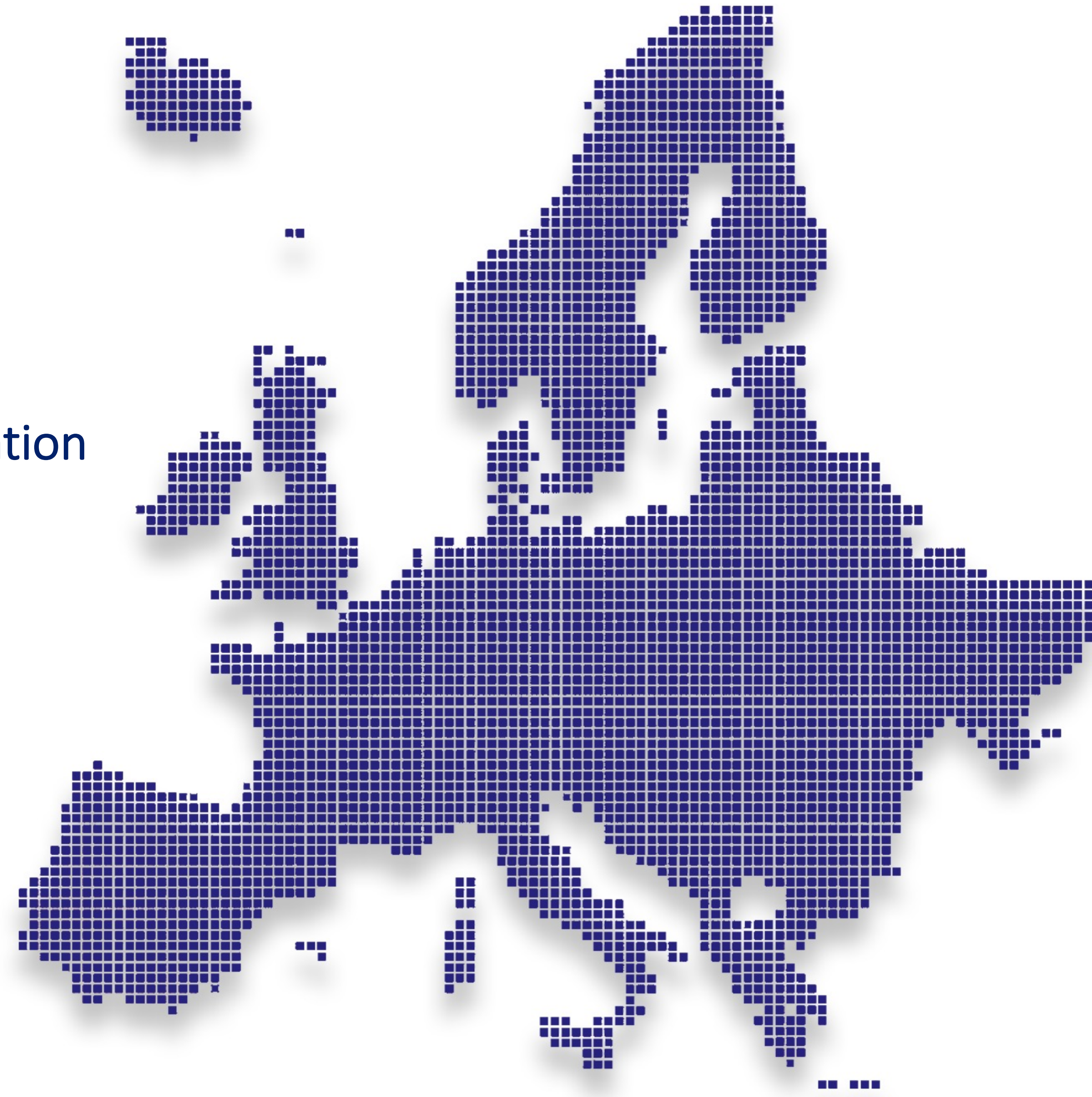
www.communicationmonitor.eu / Zerfass et al. 2021 / n = 2,186 communication professionals. Q 37: In which of the following bands does your basic annual salary fall? Results may be influenced by the distribution of types of organisations and countries among both genders.

Spread of annual salaries for communicators across Europe



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 1,970 communication professionals from 22 countries. Q 37: In which of the following bands does your basic annual salary fall? Values not reported in the graphic are below 3 percent.

Characteristics of excellent communication departments



Characteristics of excellent communication departments

A unique feature of the Global Communication Monitor studies is the identification of high-performing communication departments and their attributes. To this end, the Comparative Excellence Framework for Communication Management (CEF) inspired by business excellence models (Verčič & Zerfass, 2016) is applied. We use statistical analyses to differentiate excellent from non-excellent communication departments. After obtaining the two groups, we look at characteristics on which they differ. Excellence is conceptually based on the internal standing of the communication department within the organisation (influence) and external results of the communication department's activities as well as its basic qualifications (performance). Each of these two components is calculated on the basis of four dimensions (see page 86 for details). Only organisations clearly outperforming in all four dimensions are considered as excellent.

Our data evaluation shows that one quarter of the communication departments can be defined as excellent (25.0%), while the majority (75.0%) do not fall into this category. Governmental organisations have the greatest need to catch up, while excellence is most often found in private companies.

Excellent communication departments differ from others in numerous ways. Many aspects have been identified in the Monitor surveys on different continents and reported in various study reports since 2014 and in two books (Tench et al., 2017; Zerfass et al., 2021). Interestingly, the manifestations for specific dimensions are common across the world (e.g. Álvarez-Nobell, 2021; Macnamara et al., 2021; Meng et al., 2021; Zerfass et al., 2020).

Looking into topics researched in this survey it is notable that excellent communication departments put a stronger emphasis on using big data and algorithms (Δ +2.1%) and on digitalising communication processes (Δ +2.9%). This is meaningful as excellent departments are already ahead in terms of the digital transformation. They are significantly more mature both in digitalising stakeholder communications and in building a digital infrastructure. At the same time, their strategies for transforming technology, people, structure and tasks are all better developed. The strong correlation between such approaches and maturity (see page 29) identifies digitalisation strategies as drivers of excellence. Along this line, excellent departments are more likely to continue using video-conferencing even after the pandemic. To keep it short: Excellence in communication management is characterised by moving ahead in digitalising internal workflows and stakeholder interactions, even if you are already better than the rest.

When asked about the most important strategic issues for the profession, a smaller proportion of practitioners working in excellent departments say that strengthening the role of communications in supporting top-management decision-making (Δ -3.3%), advising and coaching executives (Δ -2.1%), or solving the challenge of addressing more audiences and channels with limited resources (Δ -5.3%) is a top priority within the next three years. This indicates that excellent departments have already reached a higher level in these regards.

Last but not least, this study proves that excellence is not only shaped on the level of communication departments and the overall organisation, but also by individual practitioners (Tench et al., 2017). Professionals working in such teams are better qualified to work in all of the five roles identified in the research. And they are more engaged in coaching or advising executives and middle managers.

Identifying excellent communication departments

The Comparative Excellence Framework uses statistical analyses to identify outperforming organisations, based on benchmarking and self-assessments known from quality management

EXCELLENCE

Communication departments in organisations which outperform others in the field

INFLUENCE

Internal standing of the communication department within the organisation

PERFORMANCE

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

ADVISORY INFLUENCE

(Q 23)

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

EXECUTIVE INFLUENCE

(Q 24)

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

SUCCESS

(Q 25)

The communication of the organisation is (much) more successful compared to those of competing organisations

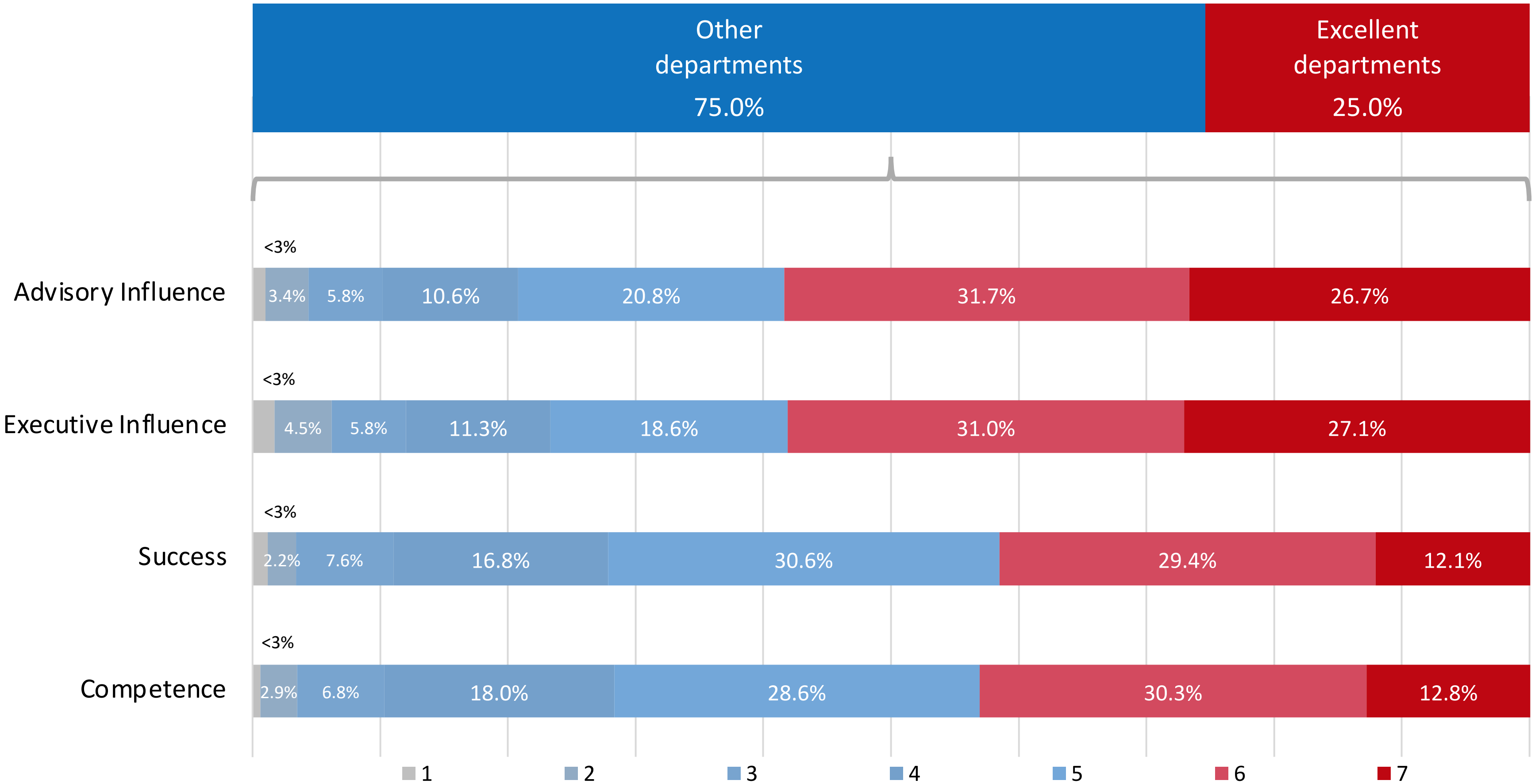
COMPETENCE

(Q 26)

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

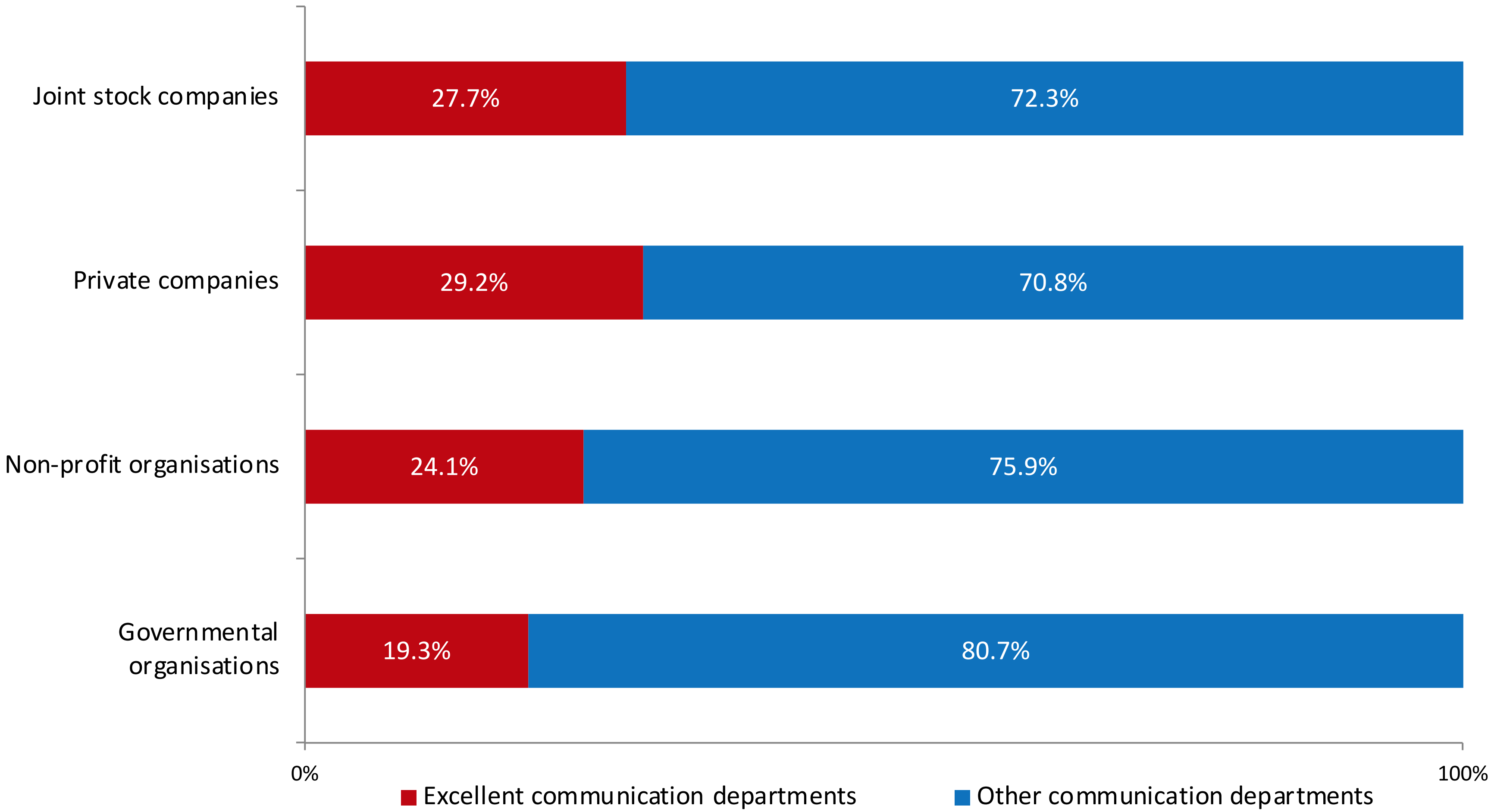
www.communicationmonitor.eu / Zerfass et al. 2021 / Only organisations outperforming in all four dimensions (scale points 6-7 on a 7-point-scale) will be considered as "excellent" in the benchmark exercise comparing distribution and characteristics of organisations, departments and communication professionals. For a description of the framework and method see Verčič and Zerfass (2016) as well as Tench et al. (2017).

Excellent communication departments in the sample



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 1,929 communications professionals in communication departments. Advisory influence, Q 23: In your organisation, how seriously do senior managers take the recommendations of the communication function? Scale 1 (Not seriously at all) – 7 (Very seriously). Executive influence, Q 24: How likely is it, within our organisation, that communication would be invited to senior-level meetings dealing with organisational strategic planning? Scale 1 (Never) – 7 (Always). Success, Q 25: In your opinion, how successful is the communication of your organisation compared to competitors? Scale 1 (Not successful at all) – 7 (Very successful). Competence, Q 26: How would you estimate the quality and ability of the communication function in your organisation compared to those of competitors? Scale 1 (Much worse) – 7 (Much better). Percentages: Excellent communication departments based on scale points 6-7 for each item.

Excellence in different types of organisation



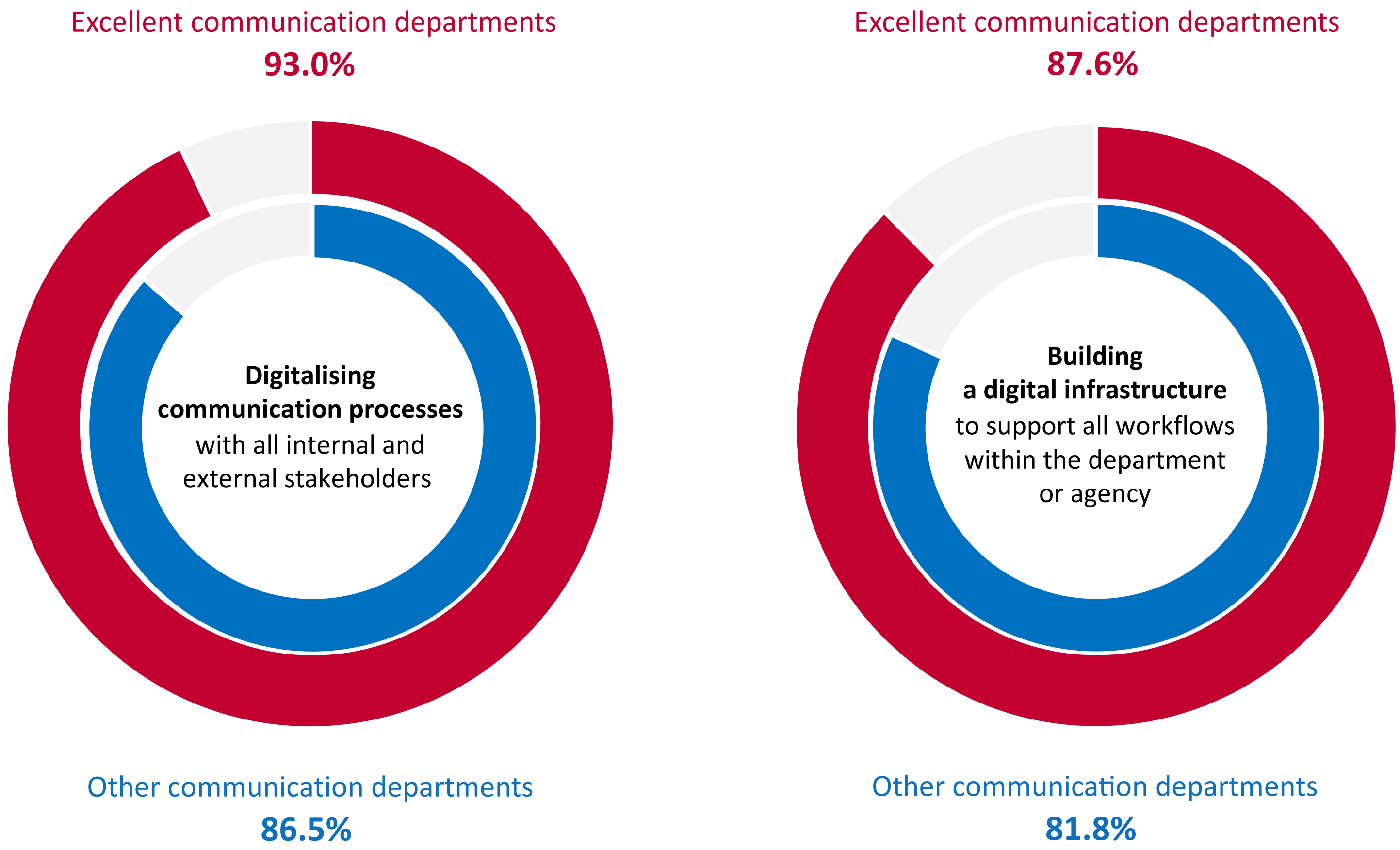
www.communicationmonitor.eu / Zerfass et al. 2021 / n = 1,929 communication professionals in communication departments. Advisory influence, Q 23: In your organisation, how seriously do senior managers take the recommendations of the communication function? Executive influence, Q 24: How likely is it, within our organisation, that communication would be invited to senior-level meetings dealing with organisational strategic planning? Q 25: In your opinion, how successful is the communication of your organisation compared to competitors? Q 26: How would you estimate the quality and ability of the communication function in your organisation compared to those of competitors? Scale 1 – 7. Percentages: Excellent communication departments based on scale points 6-7 for each question.

Excellent communication departments are less concerned with the need to deal with limited resources or to strengthen internal influence

www.communicationmonitor.eu / Zerfass et al. 2021 / n = 1,929 communication professionals in communication departments. Q 14: Which issues will be most important for PR / communication management within the next three years from your point of view? Please pick exactly 3 items. Frequency based on selection as Top-3 issue.

Excellent communication departments emphasise the importance of digitalising communication processes and building a digital infrastructure

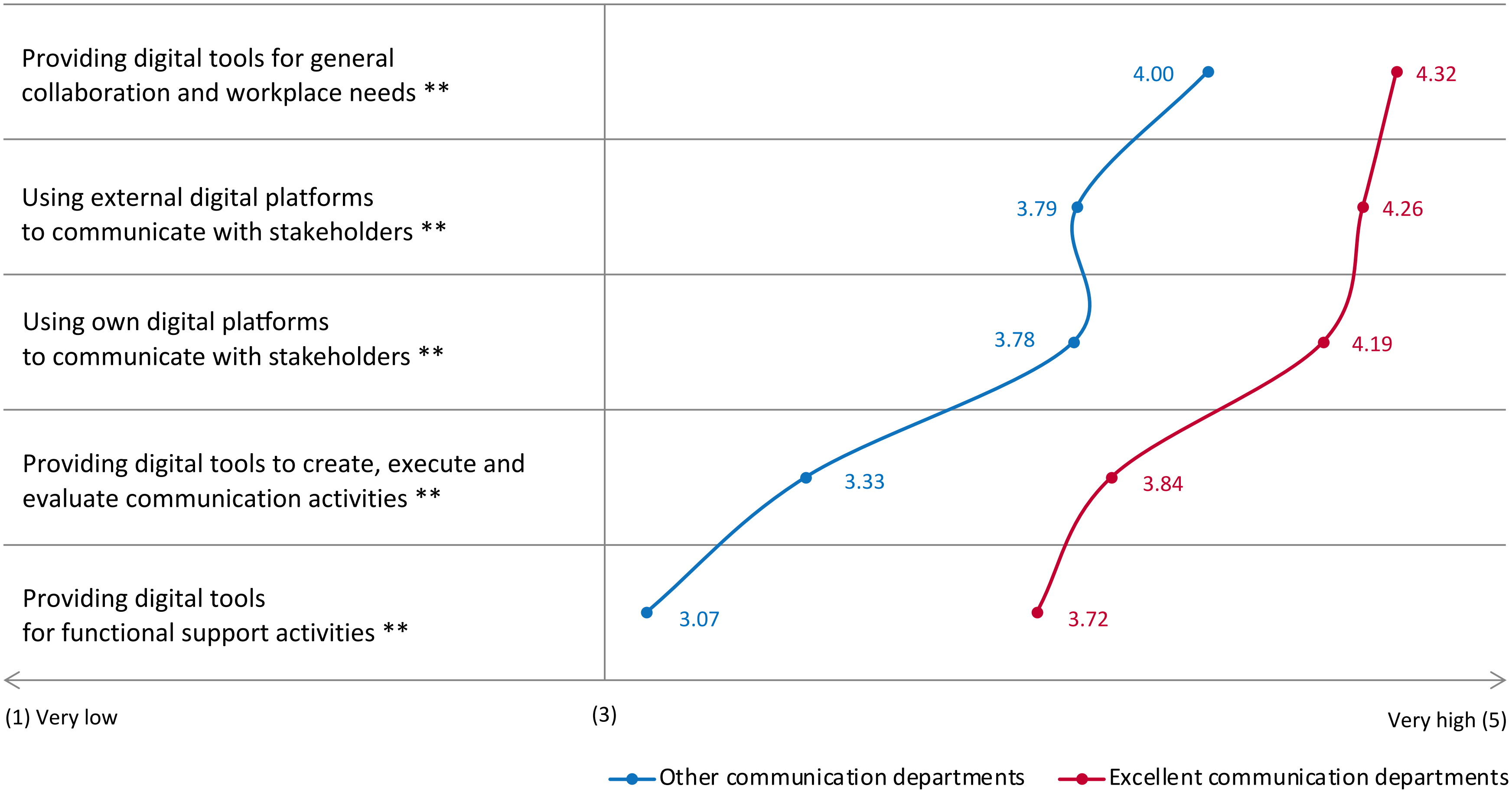
Importance of digitalising stakeholder communications and building a digital infrastructure



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 1,929 communication professionals in communication departments. Q 1: How important are the following aspects for the success of your communication department or agency? Scale 1 (Not important) – 5 (Very important). Frequencies based on scale points 4-5.

Excellent communication departments are more capable and effective in providing digital tools and infrastructure and in using digital platforms

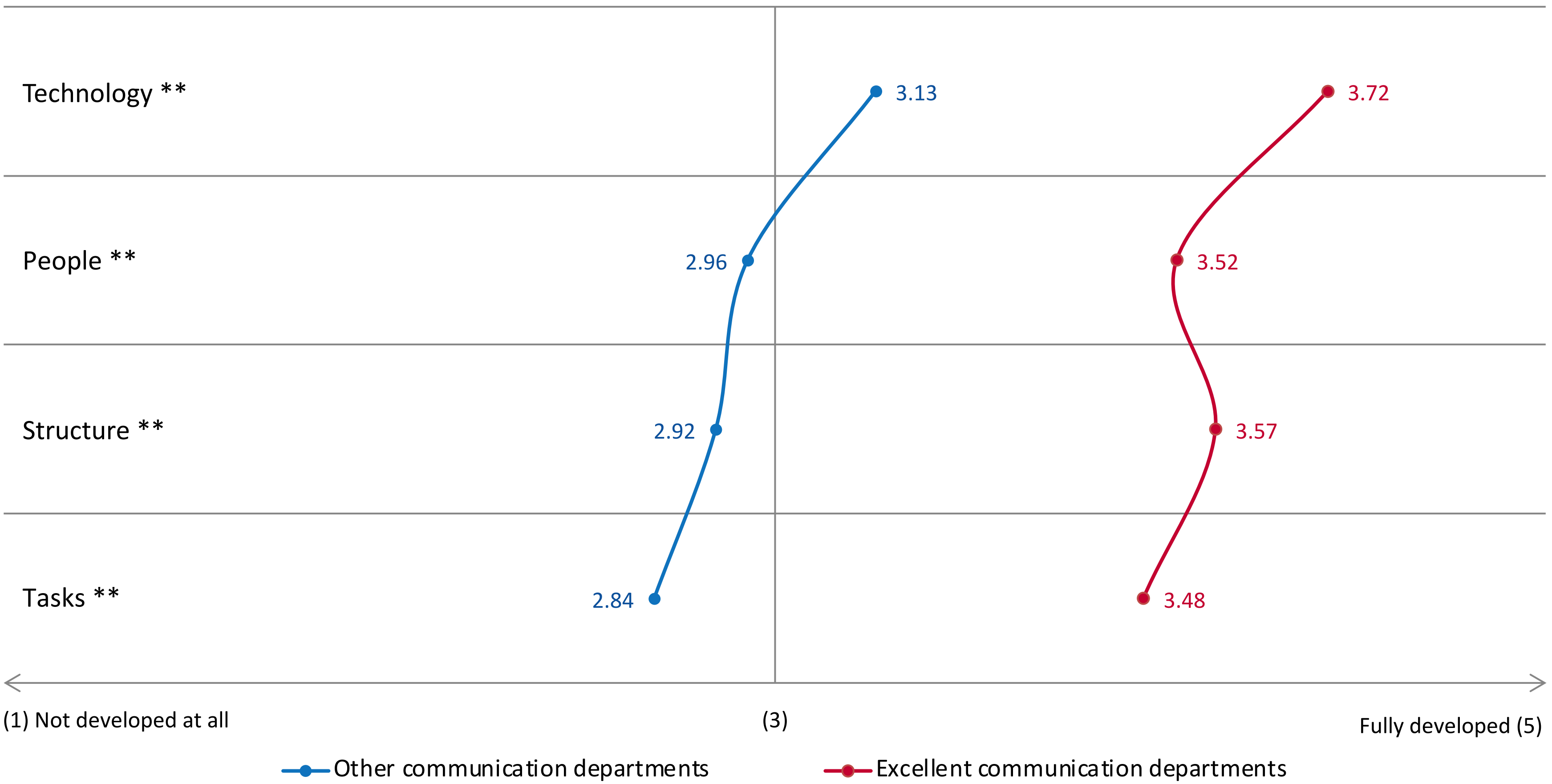
Maturity (capability and performance) in digitalising stakeholder communications and digital infrastructure



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 1,929 communication professionals in communication departments. Q 2: How do you assess the current level of maturity (capability and performance) of your communication department / agency in the following dimensions? Scale 1 (Very low) – 5 (Very high). Mean values. ** Highly significant differences (independent samples T-Test, p ≤ 0.01).

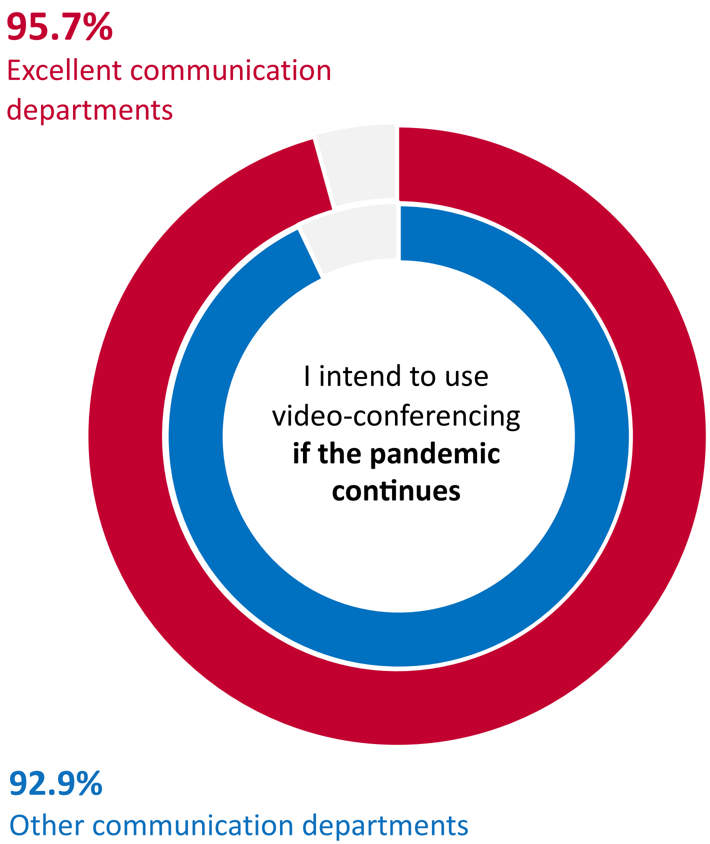
Excellent communication departments have better developed strategies and approaches for digitally transforming themselves in all key dimensions

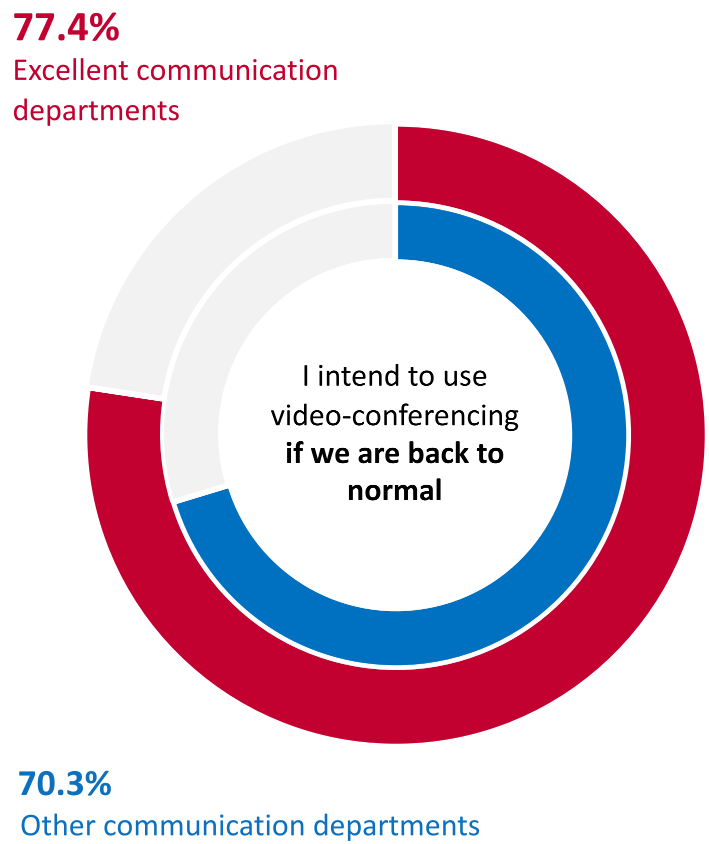
My communication department / agency has digitalisation strategies and approaches for …



www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 1,777 communication professionals in communication departments. Q 3: Introducing digitalisation and digital infrastructure is a change process. Some communication departments and agencies have developed strategies and approaches for this, which are formally documented and communicated in the team. How would you describe the situation in your organisation? Scale 1 (Not developed at all) – 5 (Fully developed). Mean values. ** Highly significant differences (independent samples T-Test, p ≤ 0.01).

Excellent departments plan to use video-conferencing to a greater extent – regardless of whether the pandemic continues or whether we are back to normal

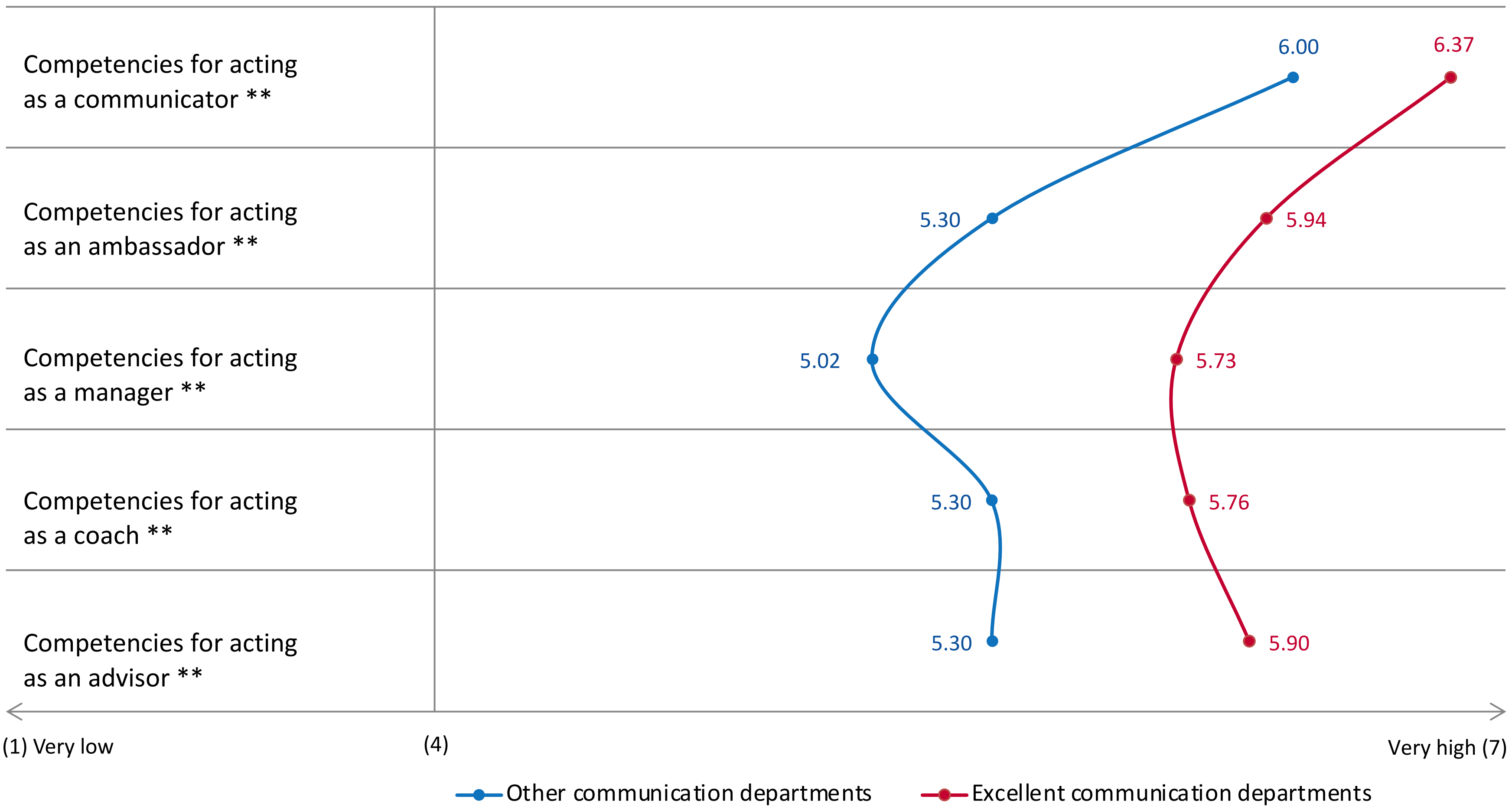




www.communicationmonitor.eu / Zerfass et al. 2021 / n ≥ 1,866 communication professionals in communication departments. Q 13: Generally speaking, to what extent do you agree with the following statements? Scale 1 (Strongly disagree) – 7 (Strongly agree). Frequencies based on scale points 5-7.

Professionals in excellent departments stand out with their skills and knowledge for fulfilling all different roles in communications

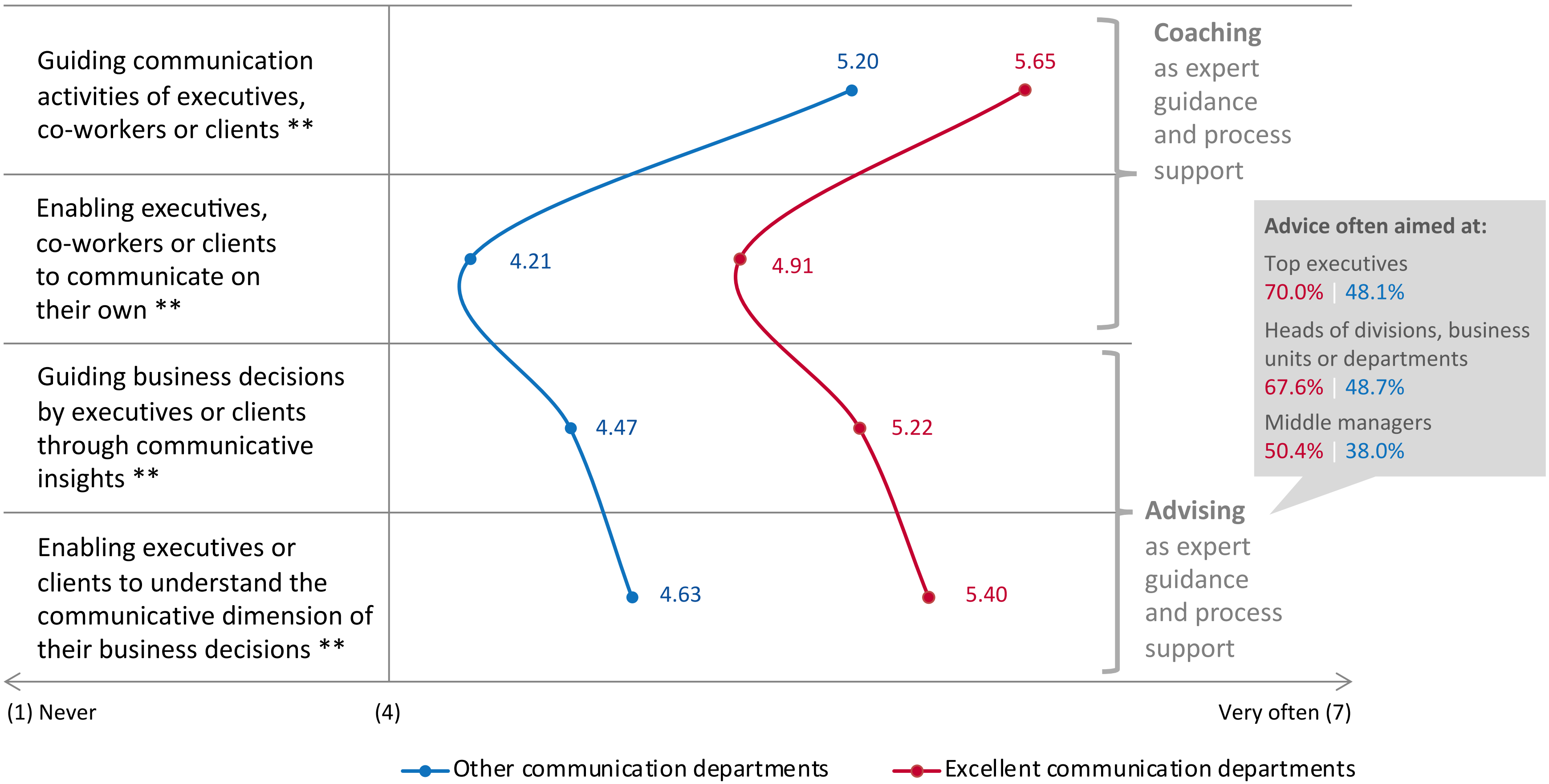
Competencies for different roles



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 1,929 communication professionals in communication departments. Q 16: Different roles require particular knowledge, skills, and personal attributes. How do you rate your competencies for the following roles? Scale 1 (None of my worktime) – 7 (All of my worktime). Mean values. ** Highly significant differences (independent samples T-Test, p ≤ 0.01).

Communication practitioners in excellent departments are more often engaged in guiding and enabling executives and colleagues at all levels of the hierarchy

Coaching and advising practices



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 1,825/1,765 communication professionals in communication departments. Q 18: When thinking about your roles as advisor or coach, how often do you perform the following activities? Scale 1 (Never) – 7 (Very often). Mean values. ** Highly significant differences (independent samples T-Test, p ≤ 0.01). Q 19: Which executives in your organisation or at your clients do you normally advise in their business decisions, either through communicative insights or by helping them to understand the communicative dimension of their jobs? Scale 1 (Never) – 7 (Very often). Percentages based on agreement for scale points 6 (Usually) or 7 (Very often).

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Note: Reports for all previous European Communication Monitor Studies are available for download at www.communicationmonitor.eu; some of them are cited in this report in footnotes for charts depicting longitudinal results (Zerfass et al., 2007 … 2021). Reports cited in chapter texts are fully listed above.

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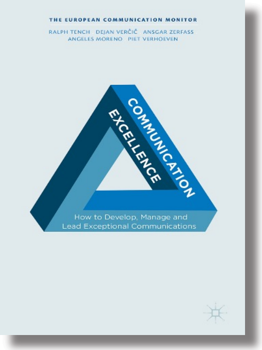

Communication excellence – How to develop, manage and lead exceptional communications
by Ralph Tench, Dejan Verčič, Ansgar Zerfass, Ángeles Moreno & Piet Verhoeven
Palgrave Macmillan, London, 247 pp., ISBN 978-3-319-48859-2

Communication excellence – How to manage strategic communication and public relations in a global world (in Chinese language)
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