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Enhancing trust and securing strategic alignment remain top challenges for the communications and PR profession in Europe / A 15 year study by five universities reveals longitudinal insights / Identifying key areas of action for leaders to drive future success

The 2023 edition of the European Communication Monitor (ECM) has been presented by a research group from leading universities in Germany, the United Kingdom, Slovenia, Norway, and Spain today. The study is known as the world's longest running empirical study on current and future developments in strategic communication and public relations. It is based on surveys of almost 40,000 communication professionals from 50 countries.

The current edition provides unique insights by combining a look back at the most important strategic issues for communication management over 15 consecutive years with a look ahead that identifies five key areas of action for communication leaders. The outlook is based on longitudinal empirical insights from the ECM and current research literature. The authors present theses for communication leaders that stimulate reflection and debate.

The full ECM 2023 Report (PDF, 64 pp.) is available for free at www.communicationmonitor.eu.

Unique insights into a rapidly changing profession that drives our societies

Leaders in business, politics, and education are invited to download and read the European Communication Monitor 2023 report to learn about a profession that shapes today's societies in a profound way.

Today's media reality with 24/7 debates on multiple channels forces businesses, non-profits, and governments alike to invest huge resources into internal and external communications with multiple stakeholders. This is the domain of communication departments and their external supporters like agencies or consultancies. The profession counts hundreds of thousands of practitioners in Europe – there are no reliable statistics, as different terms such as communication management, corporate communications, corporate affairs, organisational communication, public relations, or simply communications are used to denominate this converging field which has long outnumbered journalism in terms of employment.

Original empirical knowledge about the field is rare. Many concepts discussed have been developed in other regions, especially in the United States, without taking into account the cultural, economic, and political diversity on the Old Continent. Also, new trends are often propagated by industry studies that are hardly suitable as a basis for strategic decisions as they do not meet minimum standards of applied research.

The European Communication Monitor (ECM) has closed this gap. It started as a small academic initiative in 2007 and has grown into the largest collaborative research project in the field, now involving 28 leading universities and several partners from practice. It is the largest and longest running transnational study on strategic communication and communication management world-wide with parallel surveys in North America, Latin America and Asia Pacific, coordinated by Professor Ansgar Zerfass under the Global Communication Monitor umbrella.

The ECM is an academic study fulfilling high quality standards of social science research. It has been designed and executed by a changing team of renowned university professors representing different countries, currently: Ansgar Zerfass (Leipzig University, Germany), Dejan Verčič (University of Ljubljana, Slovenia), Ángeles Moreno (University Rey Juan Carlos, Madrid, Spain), Ralph Tench (Leeds Beckett University, UK), and Alexander Buhmann (BI Norwegian Business School, Oslo, Norway). The non-profit project is formally organised by the European Public Relations Education and Research Association (EUPRERA) and the European Association of Communication Directors (EACD), supported by premium partner Cision as well as partners CECOMS, #NORA, and Fink & Fuchs.

What keeps communicators awake at night

The ECM has tracked the rise and decline of key issues rated as important by communicators since 2007. These unique longitudinal insights reveal how communicators across Europe started to pay attention to new developments, how they deprioritised issues after some time (probably due to a better understanding and the development of practices to deal with them), and how some issues took off again or kept their status as a key strategic issue.

The study shows that two issues have been constantly on top of the mind of communicators and they will

continue to stay there at least until 2025: building and maintaining trust and linking business strategy and communication. The trust placed in organisations by their stakeholders is a valuable immaterial resource, which is often based on communication activities. It is not surprising that communicators rate building and maintaining trust as important – but the fact that they continuously prioritise it over multiple other values created by communications confirms that trust is essential for excellent organisations.

Aligning communication management with overarching organisational goals is another perennial issue. Research on future-proofing business models for communication departments; using measurement and evaluation for continuous improvement, and for benchmarking communication practices provide many solutions today, but they have probably not yet arrived in practice.

Stakeholder expectations regarding sustainability and social responsibility have also been a main concern for communicators in Europe. However, they have become less important between 2008 and 2022 and are now again among the top three strategic issues. A similar volatility, but on a higher level, applies to the assessment of challenges and opportunities related to the intensified speed and volume of information flow in a digitalised and globalised world. Last but not least, it is interesting to note that algorithmic communication has already been identified as a key strategic issue by every fourth ECM respondent in 2016 – six years before ChatGPT took off in the last year.

Key insights and drivers of success for the next decade

The ECM 2023 report identifies five areas that will shape the future of strategic communication and need specific attention, based on the empirical data and current research which has been additionally evaluated. These topics are explained in the full report with references to additional sources. The authors provide three theses for each area that help readers to reflect and discuss potential initiatives in their daily practice.

1) Leverage the potential of advanced tech and data use

Digitalisation is without any doubt the most important trigger and backbone for the rapid transformation of communication departments and consultancies. This transformation goes well beyond new channels and forms of stakeholder communication. It has a fundamental impact on the structures and workflows of communication management and the communication profession as a whole.

Ansgar Zerfass, Professor and Chair of Strategic Communication at Leipzig University, Germany, states: “Never before have communication leaders faced such great opportunities and risks at the same time. CommTech, big data, and services based on artificial intelligence can enhance the efficiency and effectiveness of organisational communication, but they also threaten current business models of communication departments and agencies. Concise transformation strategies adapted to the situation and courageous leadership are necessary to move forward.” He outlines several theses in the ECM 2023 Report:

- Digital technologies, artificial intelligence and big data change everything. Key to communicators’ success is using technology beyond automated messaging for internal advising and improved workflows.
- Vigorously implemented digitalisation strategies increase the digital maturity of communication units. They should focus on redesigning tasks and processes as well as breaking down structural barriers.
- Cyber security is essential: protecting organisational communication infrastructure, implementing analogue back-up routines and preparing for crises triggered by cyberattacks are indispensable.

2) Develop rare competencies and new roles for professionals

Managing and executing strategic communication in a global and mediatised world is a complex task. Few other professions change so quickly. The move towards engagement across multiple media platforms, use and management of large data sets and the rise of generative artificial intelligence (AI) require new competencies. They need to be addressed to enable practitioners to keep up with the sector’s evolution.

“These are difficult times”, says Ralph Tench, Professor and Director of Research for Leeds Business School, Leeds Beckett University in the United Kingdom. “Holding responsibility for managing and delivering strategic communication in our global and mediatised world is challenging. Communication professionals need to ensure they develop the skills to deal with changes to their work and evolving operational environments. The ECM outlines roadmaps for developing the next generation of communicators to be high performing and equipped to meet future business, environmental and social demands.” He argues that leaders should take care of those aspects:

- Communication practitioners lack many of the competencies required to face the challenges and unleash the full potential of digital opportunities. More effective training for use needs to be developed.
- New opportunities for communicators emerge from serving as advisors or consultants in their organisations – two roles that are expected to grow in importance in the coming years.

- Increased investment in training, even for seasoned communications professionals, and new virtual formats are needed to keep communications departments and agencies at the cutting edge.

3) Reach and impact audiences in a hyperconnected world

Globalised media, analogue and digital, have produced a hyperconnected world in which communication is not only connecting people and organisations, but is becoming the very environment in which we live. Reaching and impacting audiences is becoming easier and harder for organisations at the same time. The mediatisation of our lives calls for new ways to understand and manage media and relations with stakeholders.

This has major consequences on several levels, as Dejan Verčič, Professor of Public Relations at the University of Ljubljana in Slovenia, states: “The digitalisation of communications is driving its datafication and strategisation. Social media and social networks, often used via smartphones, shape today’s omnichannel communication. We are witnessing an amalgamation of communication disciplines in organisations, and a hybridisation of formats in the media. Trends towards greater visualisation of content are leading us into a post-literal society enhanced by augmented and virtual realities that will soon multiply into parallel worlds.” His theses derived from current research are:

- There is a clear convergence of importance of all communication channels. Today, effective and efficient stakeholder communication must be conducted omnichannel via all suitable platforms and media.
- The hybridisation of media content exemplified by brand journalism, content marketing and native advertising requires a deeper integration of communication disciplines in organisations.
- The visual turn in strategic communication through advancements in digital media, augmented reality (AR), virtual reality (VR) and parallel worlds (e.g., the Metaverse) calls for new approaches and solutions.

4) Lead and motivate extraordinary communication teams

Excellent communication depends on advanced technology, media, and skilled practitioners – but also on diverse teams that foster collaboration and innovation. The ECM and related studies in other continents have researched these aspects in detail to identify drivers of success.

Ángeles Moreno, Professor of Public Relations and Communication Management at University Rey Juan Carlos, Madrid, Spain, states: “Leadership makes a difference in communication. Educating, mentoring and promoting leadership skills should be a priority to retain the talent into collaborative, committed and DEI inclusive teams to advocate these changes for organisations and clients”. She highlights the following theses:

- Communication leaders should reinforce inclusive leadership based on shared power and collaborative decision-making to nurture a supportive team culture.
- Job satisfaction resulting from interesting tasks, career opportunities, and appreciation by superiors is a key driver for commitment among communicators – leveraging this must be a priority.
- Combining the experiences and skills of diverse colleagues will enable communication departments and agencies to support organisations’ diversity, equality, and inclusion initiatives with solid expertise.

5) Build relationships in times of misinformation and distrust

Trust in the media and other institutions has been declining across Europe during the last decade. While the rise of social media has opened up dynamic spaces for meaningful and interactive stakeholder engagement, it has also spawned new challenges for strategic communication. As content on social networking sites is shared in real-time and with little ability for editorial filtering or fact-checking, misinformation is now a common occurrence in digital online environments.

“Mis- and disinformation pose seminal challenges within our increasingly digitalised information societies”, says Alexander Buhmann, Associate Professor of Corporate Communication at BI Norwegian Business School, Oslo, Norway. “Tackling the various forms of information disorder is now a priority issue for many, including strategic communicators who are looking to build and maintain trust. As new platforms and AI-driven tools are set to further exacerbate these challenges, the search for ways to achieve purpose-driven and authentic stakeholder engagement will occupy practitioners and researchers alike.” His theses are:

- Social media platforms have created an environment in which misinformation thrives – communicators should use contemporary digital tools to monitor and challenge information disorder.
- Authenticity, emotional engagement, and storytelling are key to effective communication in a post-truth society, especially when stakeholders are highly involved, such as in crises.
- More investment in concrete and applicable ethics guidelines is needed as the shift to autonomous forms of communication assisted by AI brings new challenges for building and maintaining trust.

Study will be relaunched in 2024 with a new research design

The ECM 2023 Report concludes the successful phase of this transnational study based on a broad quantitative research design. The research project will recommence in 2024 with a new, more focused and advanced research design to be announced later this year.

Press contact for interviews and more information

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About the survey organiser

European Public Relations Education and Research Association (EUPRERA)

The mission of EUPRERA, an autonomous organisation with nearly 500 members from 40 countries, is to enhance and promote innovation in the knowledge, research, education and practice of strategic communication. Through its membership of universities and other research associations and bodies, EUPRERA is a global leader on high profile transnational research projects and networks. More than 200,000 scholars and practitioners can potentially be reached through its extended communication channels and partnership arrangements.

www.euprera.org

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Graphic 1

Caption: **ECM 2023 Report – available for free at www.communicationmonitor.eu**

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Graphic 2

Caption: **What keeps communicators awake at night:**

The five most important strategic issues for communication management since 2007

Source: European Communication Monitor 2023

WHAT KEEPS COMMUNICATORS AWAKE AT NIGHT

THE FIVE MOST IMPORTANT STRATEGIC ISSUES FOR COMMUNICATION MANAGEMENT IN EUROPE SINCE 2007

Building and maintaining trust

- Continuously rated as important by communication managers in Europe since 2007
- Peaking as the most relevant issue each year since 2018

Linking business strategy and communication

- #1 strategic issue in the first ten years of the European Communication Monitor
- Sudden drop in 2019 as operational issues became more important, but now on the rise again

Dealing with sustainable development and social responsibility

- Prioritised by less than one-fifth of practitioners between 2013 and 2018
- On a steady rise again since then and among the top three since 2020

Dealing with the speed and volume of information flow

- Always on the agenda since 2014 with a rather volatile history
- Reflects the ongoing challenge to keep up with new technologies

Using big data and/or algorithms for communication

- Already identified as an important strategic issue in 2016
- Since then constantly assessed as highly relevant by every fourth communicator in Europe

Source: www.communicationmonitor.eu (European Communication Monitor 2023; survey of almost 40,000 professionals in 50 countries from 2007–2022)