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EUROPEAN COMMUNICATION MONITOR

2022

EXPLORING DIVERSITY AND EMPATHIC LEADERSHIP,
COMMTECH AND CONSULTING IN COMMUNICATIONS.
RESULTS OF A SURVEY IN 43 COUNTRIES.

ORGANISED BY:



euprera

EACD

EUROPEAN ASSOCIATION OF
COMMUNICATION DIRECTORS

PARTNERS:

CISION



Fink & Fuchs

EUROPEAN COMMUNICATION MONITOR 2022

EXPLORING DIVERSITY AND EMPATHIC LEADERSHIP,
COMMTECH AND CONSULTING IN COMMUNICATIONS.
RESULTS OF A SURVEY IN 43 COUNTRIES.

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

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

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Please contact national EUPRERA researchers at universities in your country listed on page 108 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.

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Foreword



Our profession remains flexible and adaptable to respond to the ever-challenging times we are all experiencing. A global pandemic, the atrocious invasion of Ukraine, rising energy prices, limited supply chains and a rapidly increasing climate emergency are just some of the challenges we are all facing. Communities, companies and organisations everywhere are feeling the impact of these challenges.

In times of crisis, disruption and distrust, strategic communication is key to uncover the truth, create common ground and a shared understanding where at all possible. And as distrust is growing in society, facts and institutions are being challenged, therefore communicators have an important role to play to keep the truth up front and centre.

This year's European Communications Monitor has investigated topics that impact the future success of our profession. Diversity, equality and inclusion and empathic leadership are all about people and how we operate professionally with humanity and respect. Now that the world has embraced flexible working the future of communications teams is up for debate. Teams are innovating and creating new ways of working – digital transformation is supporting new practices.

I'm proud of our collaboration with EUPRERA and our collective efforts to build a European community of experts.

The EACD is a vibrant community that connects to discuss our professional challenges: regional debates across Europe, working groups, and specific programmes for communication leaders and next-generation leaders. I encourage you to embrace the insights and apply them in your teams and roles from today.

A handwritten signature in blue ink, appearing to read 'Kim Larsen', with a long horizontal flourish extending to the right.

Kim Larsen

*EVP, Global Head of Communication and Brand Experience, ING
President, European Association of Communication Directors (EACD)*

Introduction



We are currently experiencing a turning point in Europe. Many concepts that were considered a given yesterday are now radically questioned: The peaceful coexistence of nations and people in our region, a stable supply of energy and food, the role of politics and media as integrative forces in society, and the ability of economies to drive innovation and sustainable development.

This impacts our field – managing and executing professional communication for organisations – fundamentally. Some trends are quite specific, but others can be observed across Europe and beyond. Therefore, we decided to explore a number of globally visible trends for this edition of the European Communication Monitor. The survey was developed in collaboration with researchers from our partner studies in North America, Latin America and Asia-Pacific, who have joined forces to form the Global Communication Monitor project. Over the next few months, findings will be gathered from around the world on the topics covered in this report. Comparative analyses will add further depth to the findings presented here.

What are the topics explored in this 16th annual edition of the European Communication Monitor, the longest-running and largest empirical study of the communication profession? First of all, we looked at the impact of the controversial debates on diversity, equality and inclusion on the profession. Our data reveal some surprising findings about how communication practitioners follow the discussion and how they contribute to such initiatives for their organisations or clients. Another trend emerging in society is a new approach to leadership that emphasises empathy and responsiveness to employees' feelings and emotions. The survey shows how this is resonating with leaders in our field and how it contributes to engagement and commitment at work.

There is no doubt that motivated teams are more necessary than ever to meet the challenges that communications faces today. Digital technology is here to help. But many organisations struggle as the use of CommTech (Communication Technology) is hampered by various barriers. Our research identifies the most important ones and shows that the profession needs to catch up quickly. Last but not least, we took a closer look at the working practices of communicators in the post-pandemic world, strategic issues for the profession and the increasing need of communication consultancy, prompting calls for new quality standards.

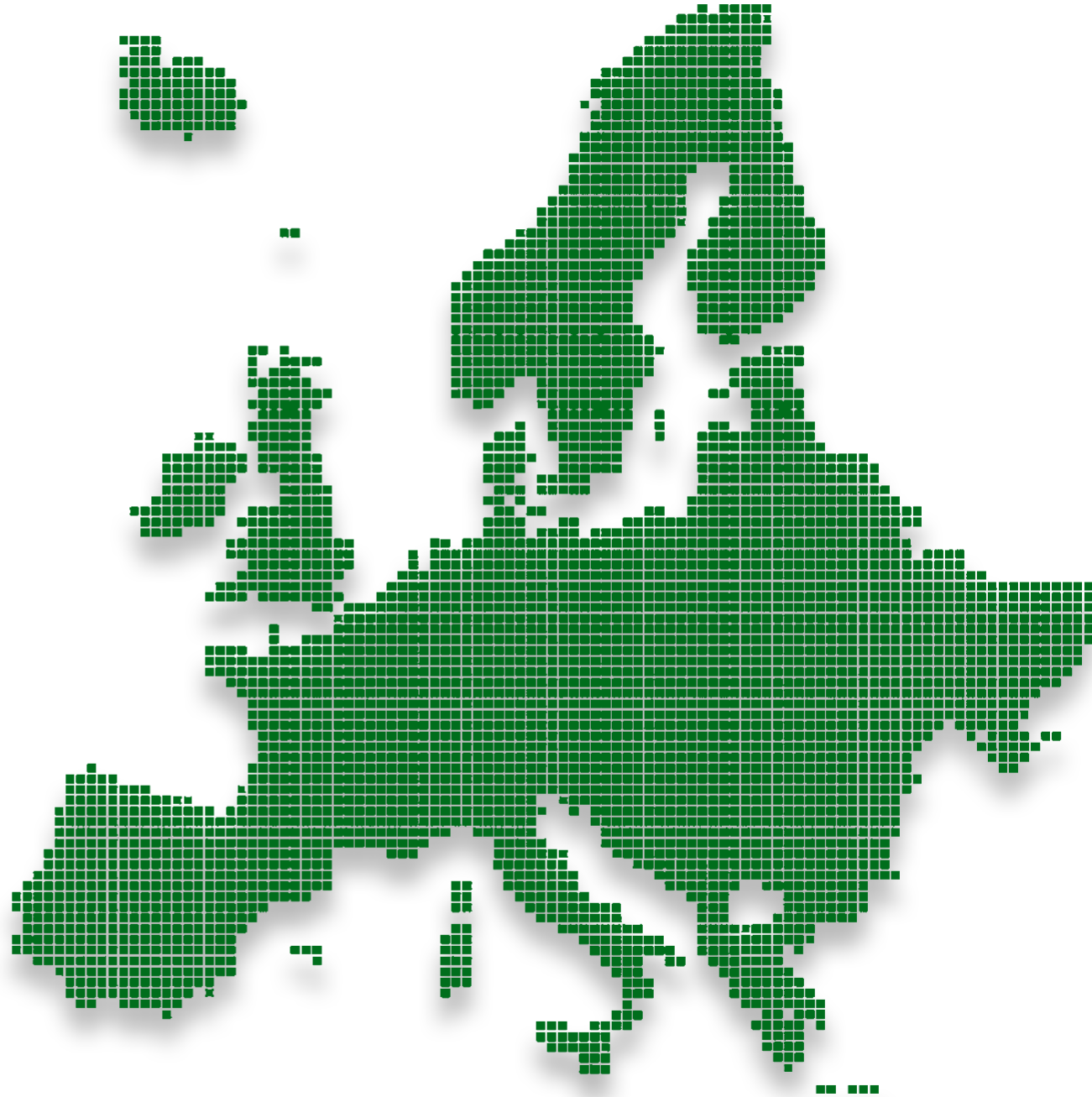
On behalf of the research team, I would like to thank each and every practitioner who participated in the survey during difficult times. Many thanks to our partners Cision, Fink & Fuchs, #NORA and CECOMS for their valuable support. We appreciate the great work done by Jens Hagelstein and Ronny Fechner (Leipzig University), Virginia Villa (EUPRERA) and Angela Howarth (EACD). A large number of trusted academic colleagues at prestigious universities across Europe are supporting this study as national collaborators – thank you all!



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

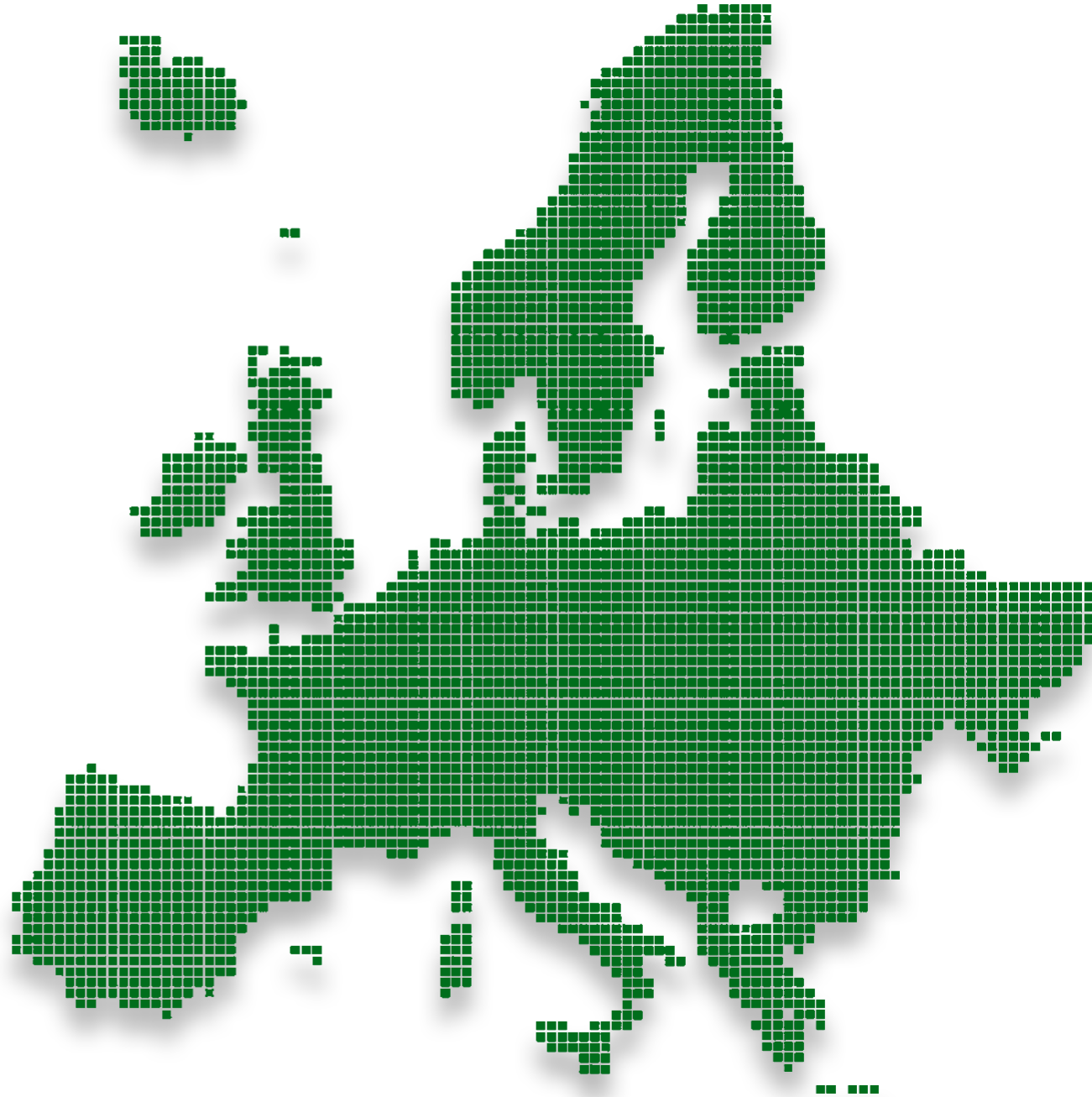
The European Communication Monitor (ECM) 2022 explores current practices and future developments of managing communication in companies, non-profits and other organisations, as well as in communication consultancies and agencies across Europe. It is the 16th annual edition of a survey that has been conducted since 2007 and part of the Global Communication Monitor series with similar surveys in North America, Latin America and Asia-Pacific. A joint project by academia and practice, 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 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 as regional partners.

The ECM is an academic study fulfilling high quality standards of social science research. The study has been designed and executed by a team of renowned university professors representing different country contexts: Ansgar Zerfass, Ángeles Moreno, Ralph Tench, Dejan Verčič and Alexander Buhmann. A wider board of professors and national research collaborators ensure that the survey reflects the diversity of the field and different country contexts. This edition has surveyed communication practitioners from 43 European countries. They have answered a comprehensive questionnaire that collects a variety of independent and dependent variables in a unique research framework (see page 12): personal characteristics of communication professionals; features of the organisation; attributes of the communication department; the current situation of the professional and the organisation; and perceptions on future developments.

The study examines five constructs. First, it empirically examines whether and how two much-discussed developments in societies and organisations resonate in today's communication profession: the desire for recognising diversity, equality and inclusion (DEI) and the trend towards a more empathic leadership style driven by new collaborative practices during the Covid-19 pandemic and demand from younger generations. Second, four current developments in the industry are explored: the digitalisation of communication departments and agencies, particularly the use of CommTech; current working routines based on flexibility and online collaboration tools; strategic issues shaping practitioner thinking; and the dynamics of consulting in communications. Third, longitudinal comparisons are made to track the evolution of strategic issues and salaries across Europe. To this end, questions from previous ECM surveys (Zerfass et al., 2021a, and before) have been repeated. Fourth, regional and national differences are revealed by breaking down the results to 22 key countries. Fifth, statistical methods are used to identify high-performing communication departments in the sample (Tench et al., 2017b; Verčič & Zerfass, 2016) and define which aspects make a difference there.

All research questions and empirical tools used in this study are based on a thorough analysis of the international body of knowledge in strategic communication (Falkheimer & Heide, 2023; Holtzhausen & Zerfass, 2015; Nothhaft et al., 2019), public relations (Tench & Waddington, 2021; Valentini, 2021) and corporate communications (Cornelissen, 2020; Zerfass et al., 2022a). The ECM contributes to the advancement of these disciplines by shedding light on practices and developments in one of the world's most important regions.

Methodology and demographics



Methodology and demographics

The online questionnaire of the European Communication Monitor 2022 consisted of 36 questions. Five of these questions were only presented to professionals working in communication departments and one only to those who work in consultancies and agencies. Instruments used dichotomous, nominal and ordinal response scales. They were based on research questions and hypotheses derived from previous research and literature. The survey used the English language and was pre-tested with 52 communication professionals in 21 European countries. The final questionnaire was active for five weeks in February and March 2022. More than 15,000 professionals throughout Europe were invited with personal e-mails based on a comprehensive database built by the research team over a decade. Additional invitations were sent via national research collaborators and professional associations.

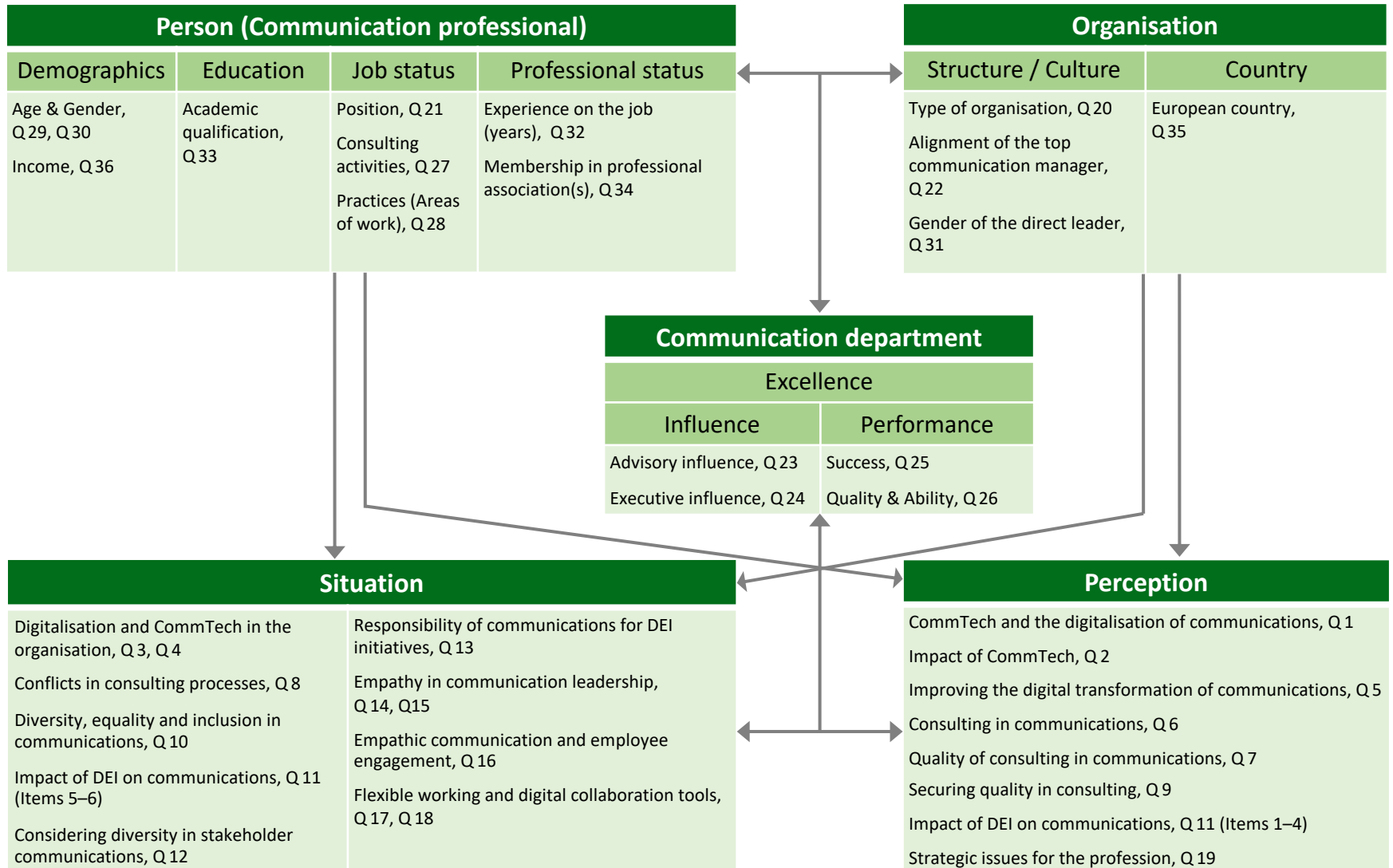
In total 5,126 respondents started the survey and 1,771 of them completed it. Answers from participants who could not clearly be identified as part of the population were deleted from the dataset. This strict selection of respondents is a distinct feature of the ECM and sets it apart from many studies which are based solely on snowball sampling or which include students, academics and people outside of the focused profession or region. The evaluation presented in this report is based on 1,672 fully completed survey questionnaires by communication professionals in Europe.

The Statistical Package for the Social Sciences (SPSS) was used for data analysis. 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 the footnotes. Significant results are marked with * ($p \leq 0.05$, significant) or ** ($p \leq 0.01$, highly significant) in the graphics or tables and also mentioned in the footnotes.

The demographics reveal the high quality of the sample, which is dominated by senior professionals with a sound qualification base and a long tenure in the field. The average age is 44.8 years. Two out of three respondents are communication leaders: 33.4% hold a top hierarchical position as head of communication in an organisation or as chief executive officer of a communication consultancy; 30.7% are unit leaders or in charge of a single discipline in a communication department. 72.3% of the professionals interviewed have more than ten years of experience in communication management. 58.0% of all respondents are female and a vast majority (96.8%) in the sample has an academic degree. More than two thirds hold a graduate degree or even a doctorate.

Two out of three respondents work in communication departments in organisations (16.4% joint stock companies; 21.9% private companies; 19.1% government-owned, public sector, political organisations; 9.6% non-profit organisations, associations), while 33.0% are communication consultants working freelance or for agencies. Practitioners from 43 European countries participated in the survey. Detailed insights were calculated for 22 key markets. Most respondents (31.5%) are based in Southern Europe (countries like Italy, Spain, Portugal, Serbia), followed by Western Europe (27.6%; countries like Germany, Austria, Netherlands, Belgium), Northern Europe (26.3%; countries like United Kingdom, Norway, Sweden, Finland), and Eastern Europe (14.7%; countries like Romania, Poland, Bulgaria, the Czech Republic).

Research framework and questions



Demographic background of participants

Position

Head of communication, Agency CEO	33.4%
Unit leader, Team leader	30.7%
Team member, Consultant	29.1%
Other	6.8%

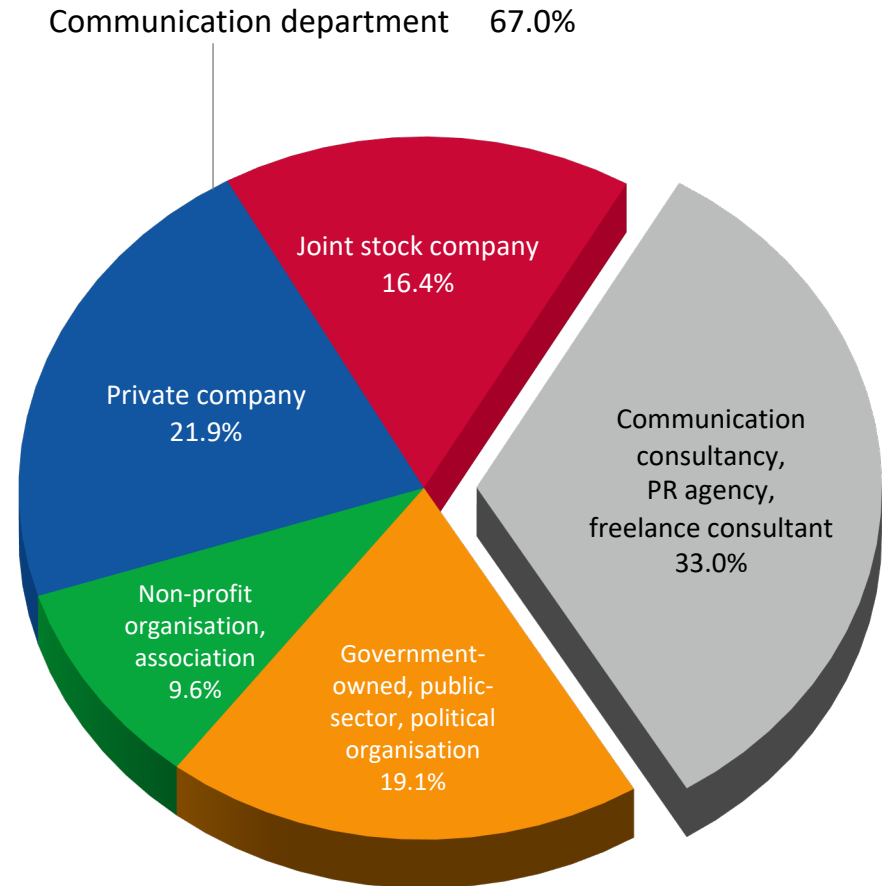
Job experience

More than 10 years	72.3%
6 to 10 years	13.6%
Up to 5 years	14.1%

Alignment of the communication function

Strongly aligned communication department	28.4%
Aligned communication department	56.3%
Weakly aligned communication department	15.3%

Organisation



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,672 communication professionals. Q 20: Where do you work? Q 21: What is your position? Q 32: How many years of experience do you have in communication management/PR? Alignment: n = 1,121 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	58.0%	50.5%	54.1%	70.0%
Male	41.5%	49.5%	45.9%	30.0%
Age (on average)	44.8 years	48.9 years	45.0 years	39.6 years

Membership in a professional association

European Association of Communication Directors (EACD)	8.2%
Other international communication association	14.2%
National PR or communication association	52.0%

Highest academic educational qualification

Doctorate (Ph.D., Dr.)	10.5%
Master (M.A., M.Sc., Mag., M.B.A.), Diploma	63.8%
Bachelor (B.A., B.Sc.)	22.5%
No academic degree	3.2%

Countries and regions represented in the study

Respondents are based in 43 European countries and four regions

Western Europe
27.6% (n = 462)



Northern Europe
26.3% (n = 439)



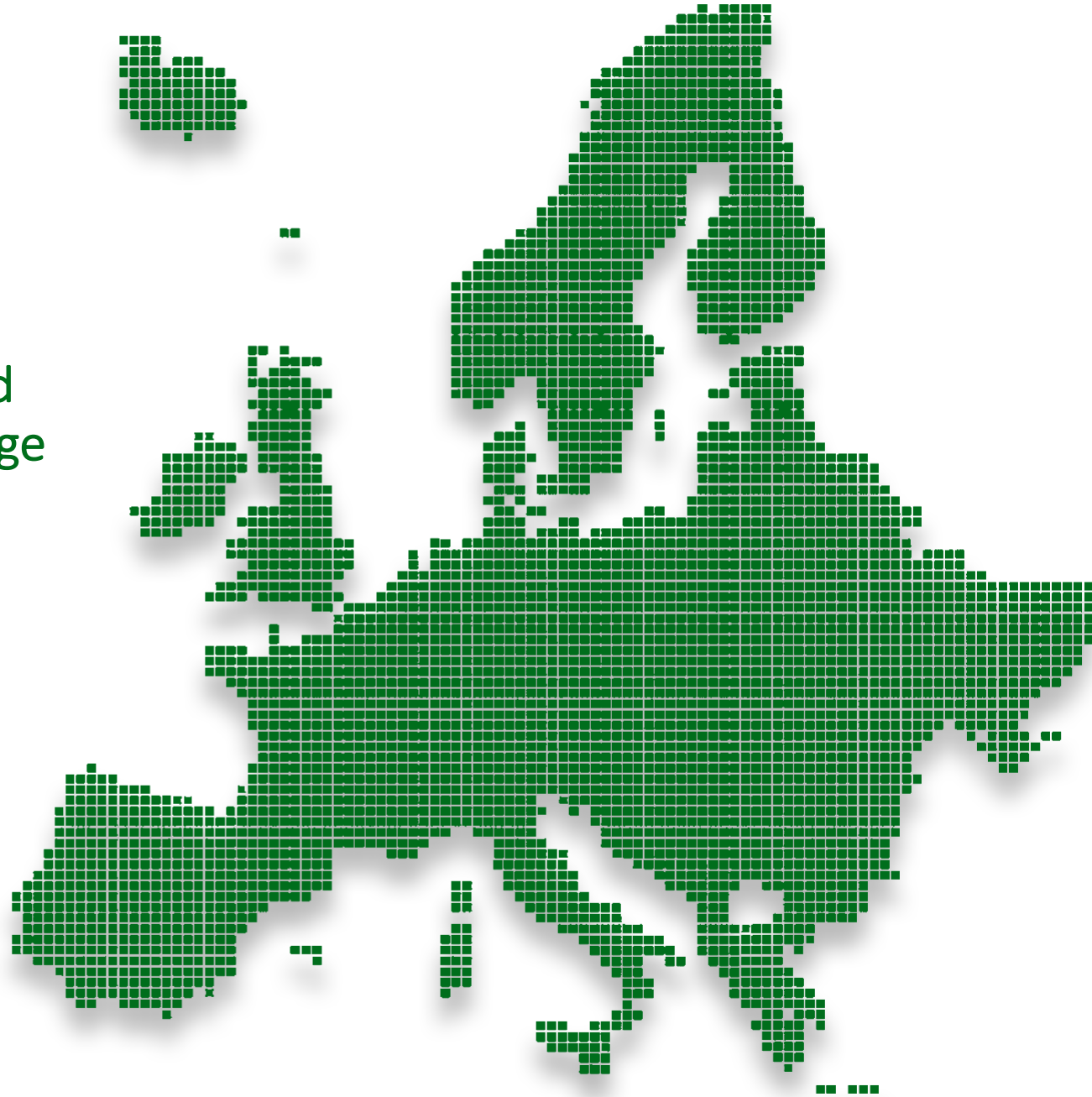
Southern Europe
31.5% (n = 526)



Eastern Europe
14.7% (n = 245)



Diversity, equality and
inclusion as a challenge
for the profession



Diversity, equality and inclusion as a challenge for the profession

Diversity, equality and inclusion (DEI) are concepts influencing organisational policies and communications worldwide. The debate has been expanded from diversity to a broader conception including fair treatment of everybody (equality) and building a culture of being seen, heard, and valued (inclusion) (Bendl et al., 2014; Mor Barak, 2022; Vertovec, 2015). There is also an increasing discussion about the role DEI should play in communications and vice versa (Mundy, 2016). The PR Coalition (2005) grouping 28 main associations in the field stated that public relations had a role to play in championing diversity in organisations and in communities. Professional bodies have enlarged and enriched the debate in the last few years (ICCO, 2022b; IPR, 2021; Spector & Spector, 2018).

This study explores whether and how this rather normative and conceptual debate resonates in the daily practice of communication management in Europe. Results show that only every second practitioner has followed the global trends and discussions (50.7%). About the same number of respondents confirm that the topic is heavily discussed in their country (49.5%). Understandably, only 15.3% of the respondents believe that supporting DEI is a highly relevant topic for the profession in the near future. As DEI is manifested and managed contextually in light of stakeholder expectations and social norms, it is understandable that the issue is more prevalent in Northern and Western Europe. Nevertheless, communication leaders throughout Europe are paying more attention to DEI. 54.9% of department heads and agency leaders have followed relevant global trends and debates about DEI closely.

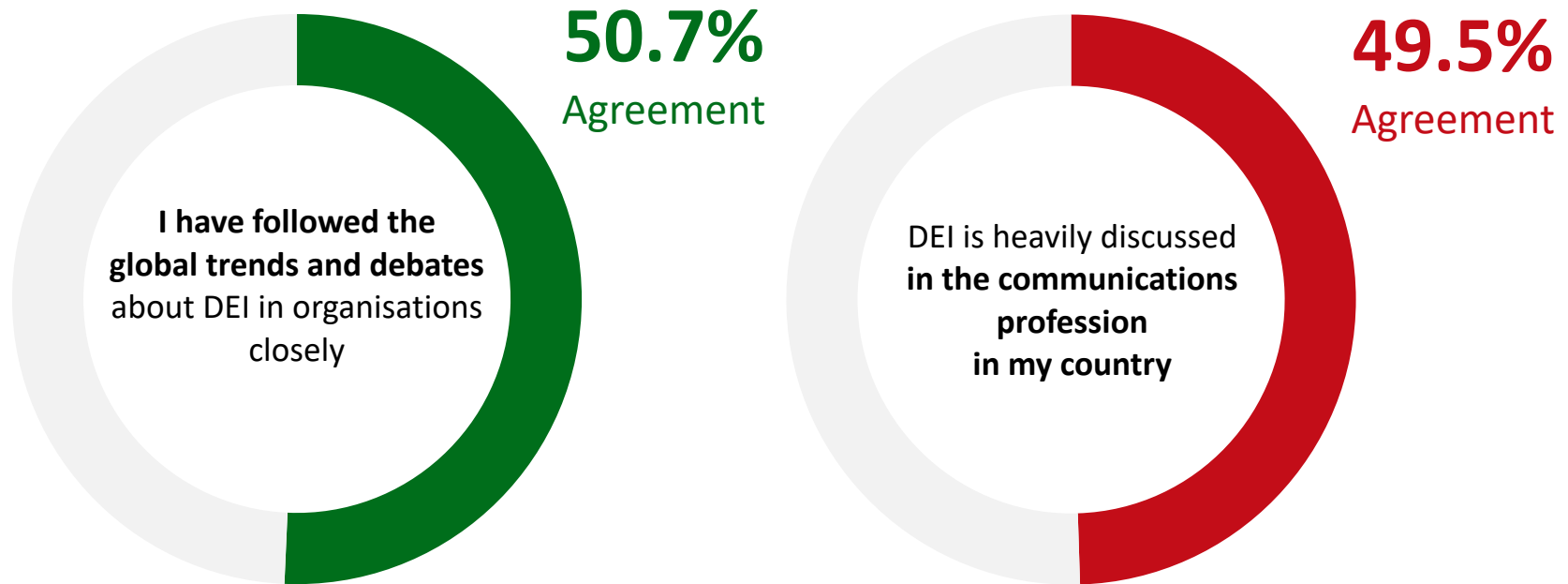
Looking at typical dimensions of diversity (Charta der Vielfalt, 2021), it becomes clear that every second organisation considers age (51.6%), ethnicity (50.9%) and gender (50.5%) when planning and executing communication initiatives. Sociocultural status (39.3%), disabilities (38.1%), worldviews and political opinions (30.9%) and spiritual beliefs (26.7%) are taken into account less often.

In terms of developing a highly inclusive workplace, strategic communication about DEI, especially as part of formal communication, is key to increase the perception of inclusion (Wolfgruber et al., 2021). Most practitioners acknowledge this and state that DEI can impact trust with external (74.6%) and internal (70.7%) stakeholders. They carefully consider DEI factors when producing content (69.4%). But only one third believes in an actual change towards diversity in the communication workforce in the near future (38.7%).

Six out of ten communication departments and agencies are involved in DEI initiatives, but only about three out of ten are responsible for it. Typical mandates include responding to the needs of internal and external publics. The most common responsibilities of communicators are informing internal audiences (45.4%), celebrating DEI internally and externally (45.2%) and developing plans for communication about DEI (42.9%). Breaking down the data by type of organisation, joint stocks companies are clearly ahead in most dimensions, although non-profits are most likely to be involved in creating organisational policies for DEI. Private companies are behind in most dimensions, except on implementing such policies.

The business case for diversity argues that more diversity in organisations leads to more creative and inclusive thinking, provides a competitive edge, heightens an organisation's social license to operate, and creates more success in the marketplace (Herring, 2009). There is much room in the European communications profession to gain these benefits.

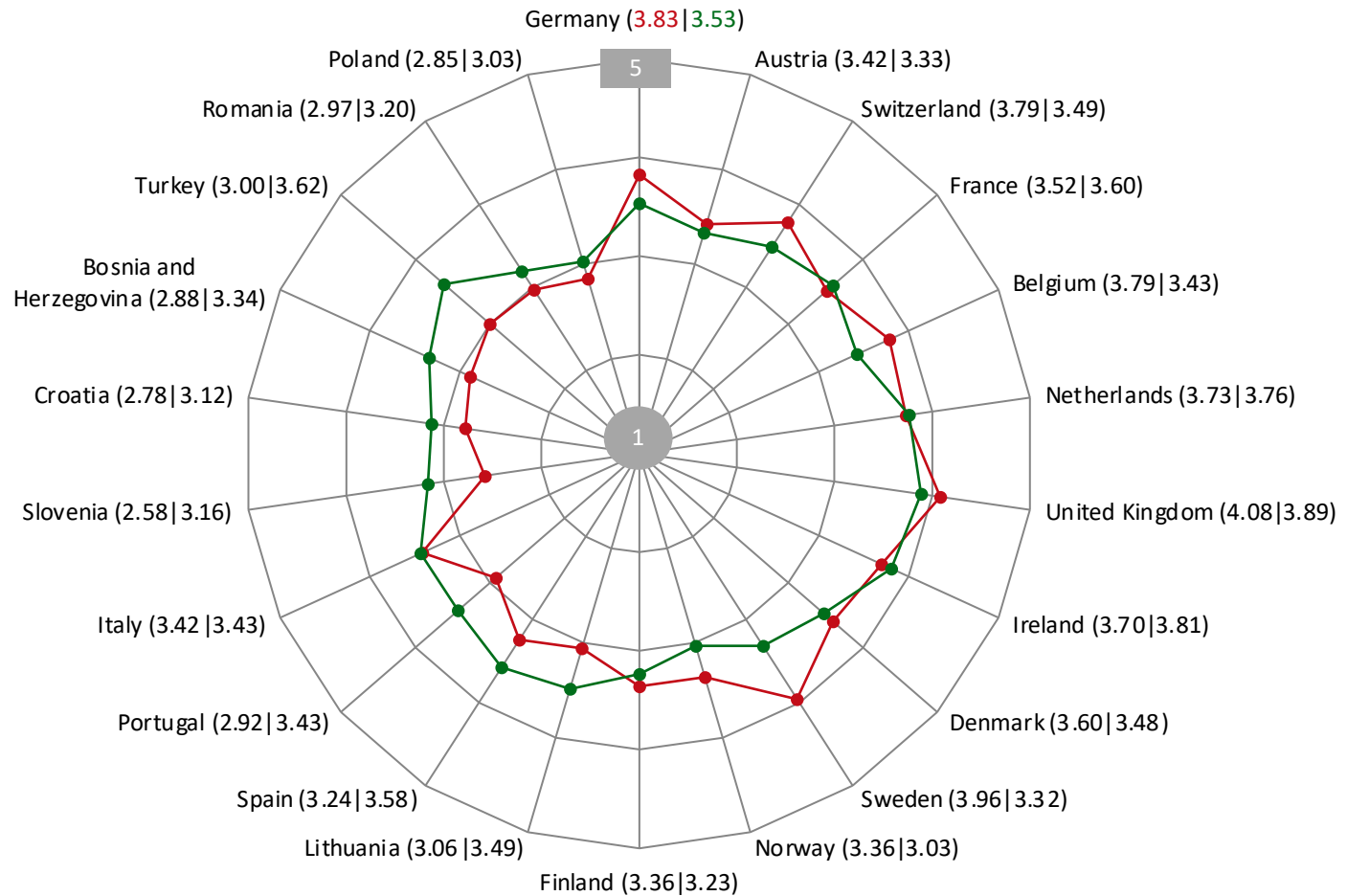
Only every second communication professional in Europe has followed global debates about diversity, equality and inclusion (DEI) and confirms their national relevance



Only 15.3% believe that supporting DEI is among the top three most important issues for communication management within the next three years

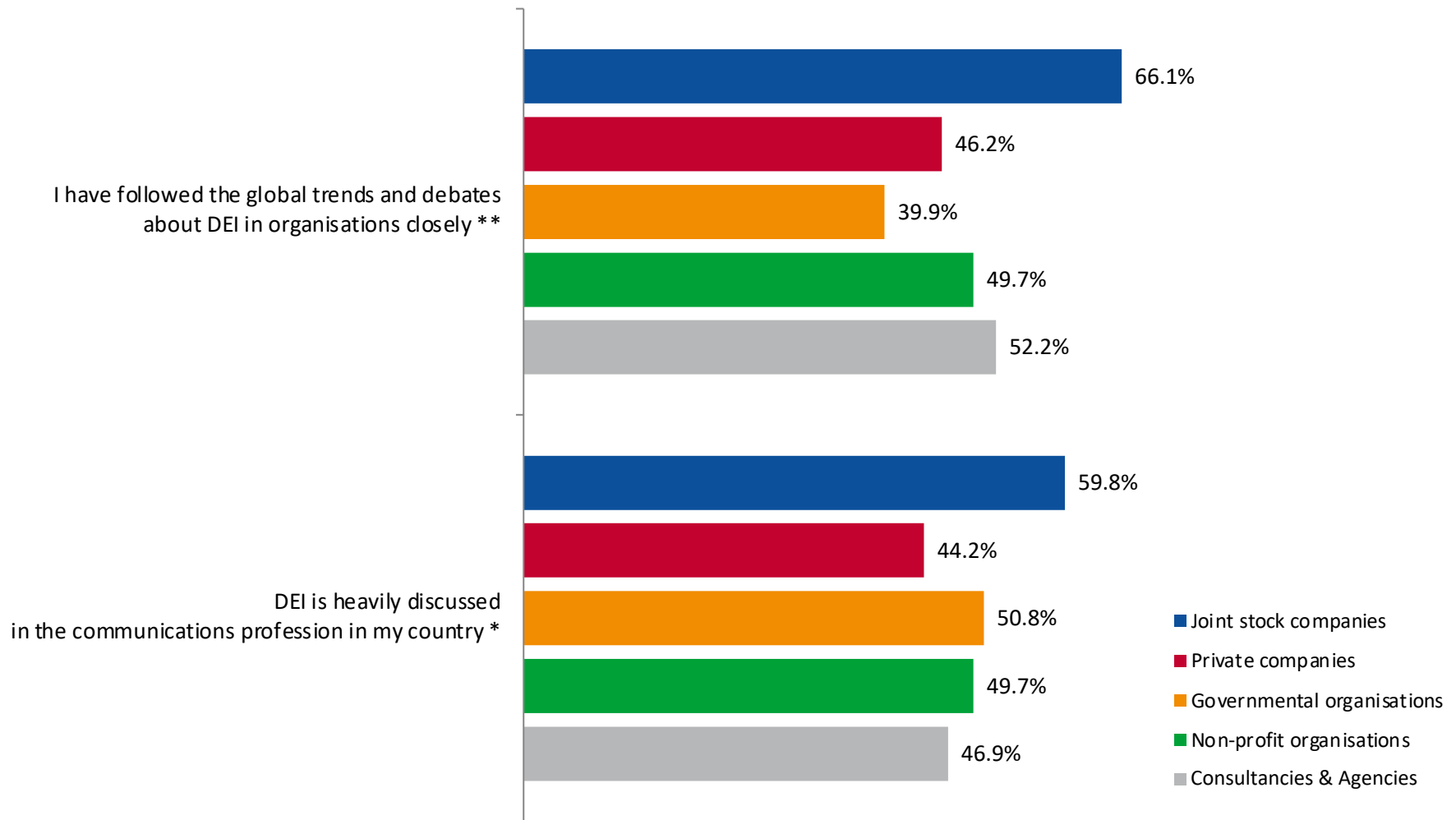
www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,609 communication professionals. Q 10: Diversity, equality, and inclusion (DEI) are concepts influencing organisational policies and communication activities worldwide. The debate on diversity has grown to include more than gender, race, ethnicity, or physical disabilities. Broader issues such as sometimes invisible differences of people regarding age, social background, sexual orientation, or gender identity are also discussed today. Moreover, the debate on diversity has been expanded to fair treatment of everybody (equality) and building a culture of being seen, heard, and valued (inclusion). To what extent do you agree with the following statements? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequencies based on scale points 4-5. Q 19: 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.

DEI is heavily discussed in the UK, Ireland, Sweden, Belgium, Netherlands, Germany and Switzerland, but less prevalent in Southern and Eastern Europe

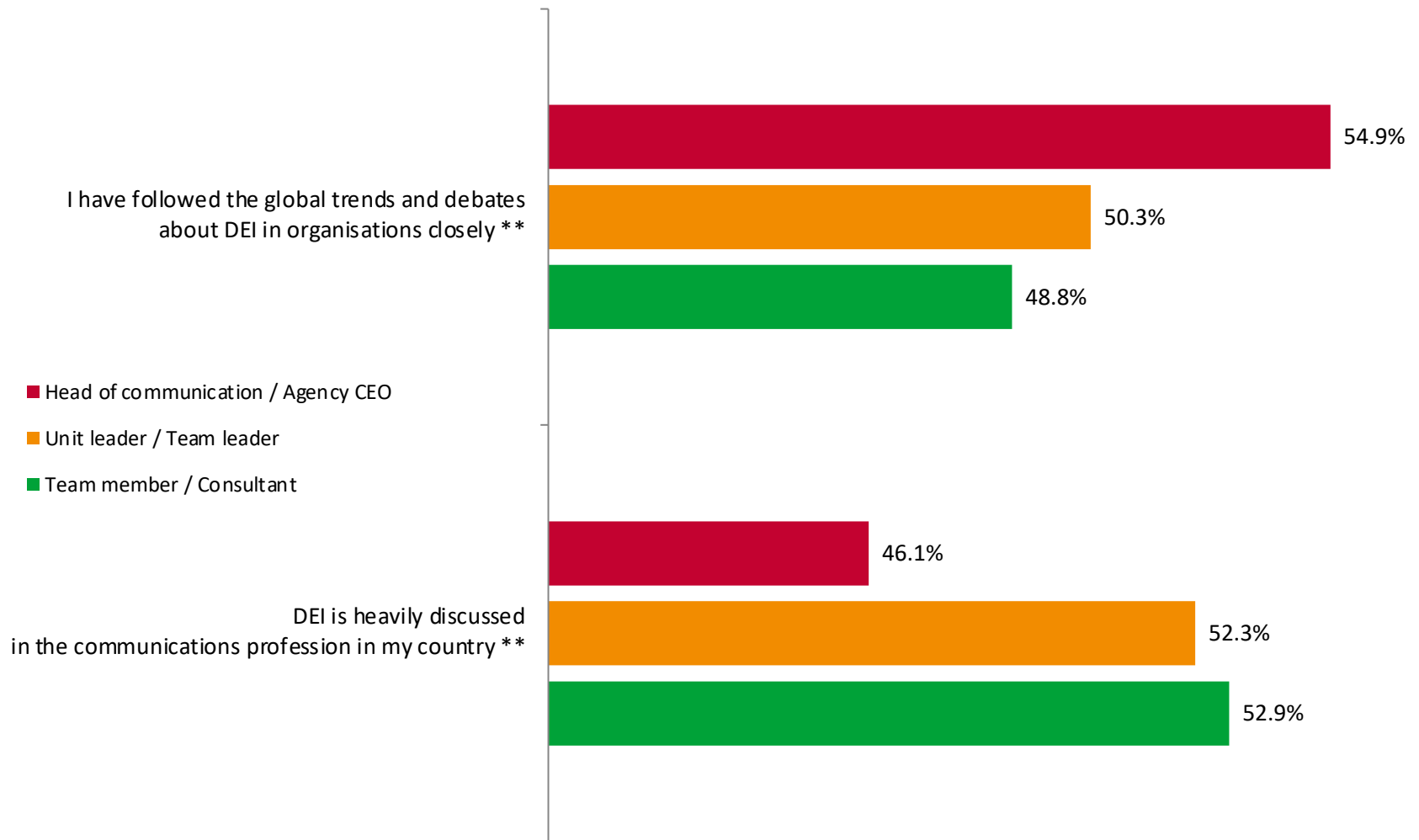


- DEI is heavily discussed in the communications profession in my country
- I have followed the global trends and debates about DEI in organisations closely

Practitioners working in joint stock companies are significantly more aware of the global DEI debate and related discussions within their national communities



Top communicators pay more attention to global debates on diversity and inclusion, while lower-level practitioners assign more importance to national debates



Most communicators fear the risks of losing stakeholder trust by communicating too positively about DEI initiatives, but many are not involved in such programs

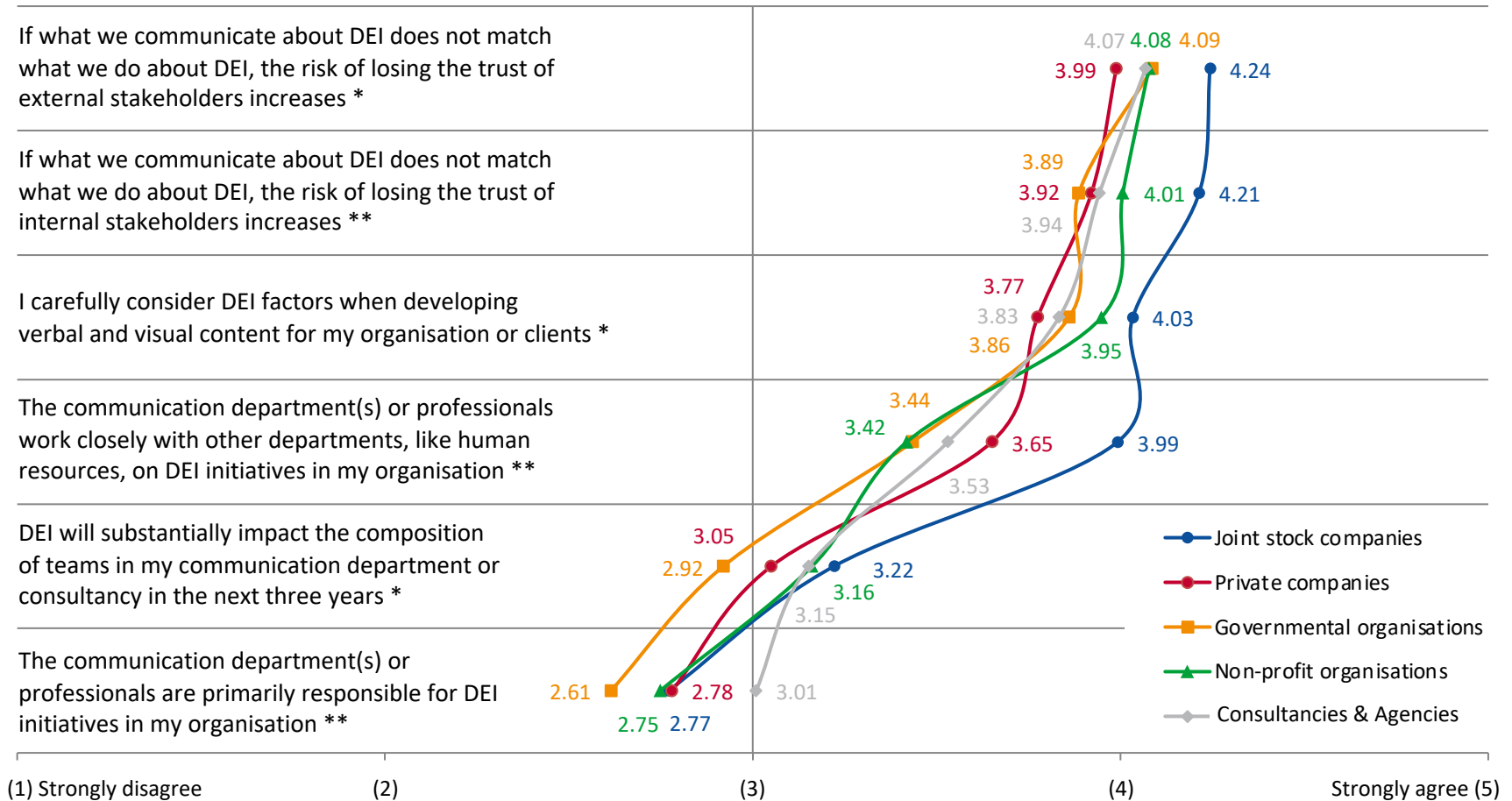
Impact of diversity, equality and inclusion on communications



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,609 communication professionals. Q 11: The debate on diversity, equality, and inclusion in organisations and society might influence communications in different ways. When thinking of your own organisation, how much would you agree with the following statements? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequencies based on scale points 4-5.

Professionals in joint stock companies see a stronger impact of DEI on communications than practitioners working in other types of organisations

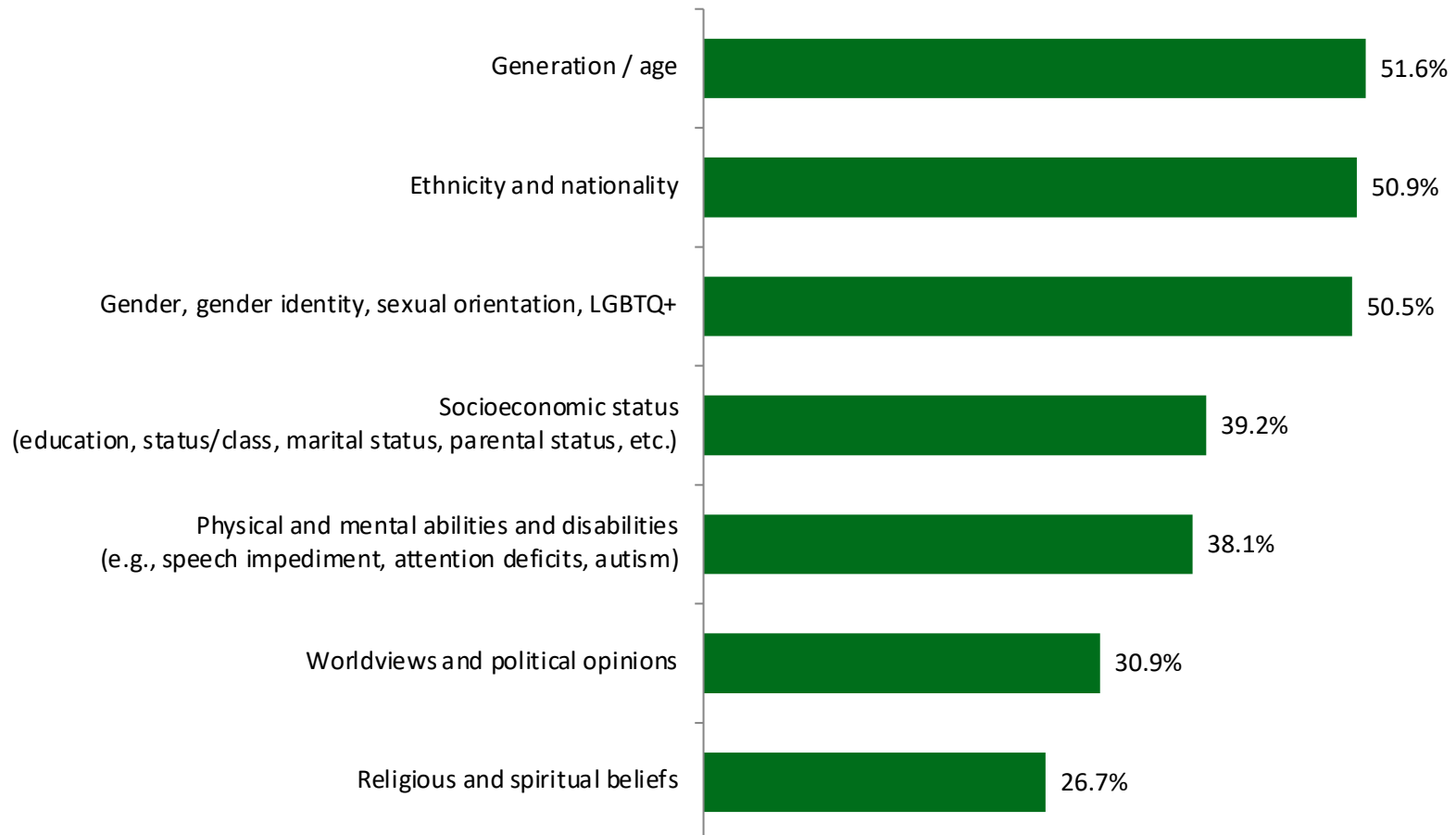
Impact of diversity, equality and inclusion on communications



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,609 communication professionals. Q 11: The debate on diversity, equality, and inclusion in organisations and society might influence communications in different ways. When thinking of your own organisation, how much would you agree with the following statements? Scale 1 (Strongly disagree) – 5 (Strongly agree). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01). * Significant differences (ANOVA, p ≤ 0.05).

Every second organisation recognises diversity in terms of age, ethnicity and gender in its communication activities; other aspects are less common

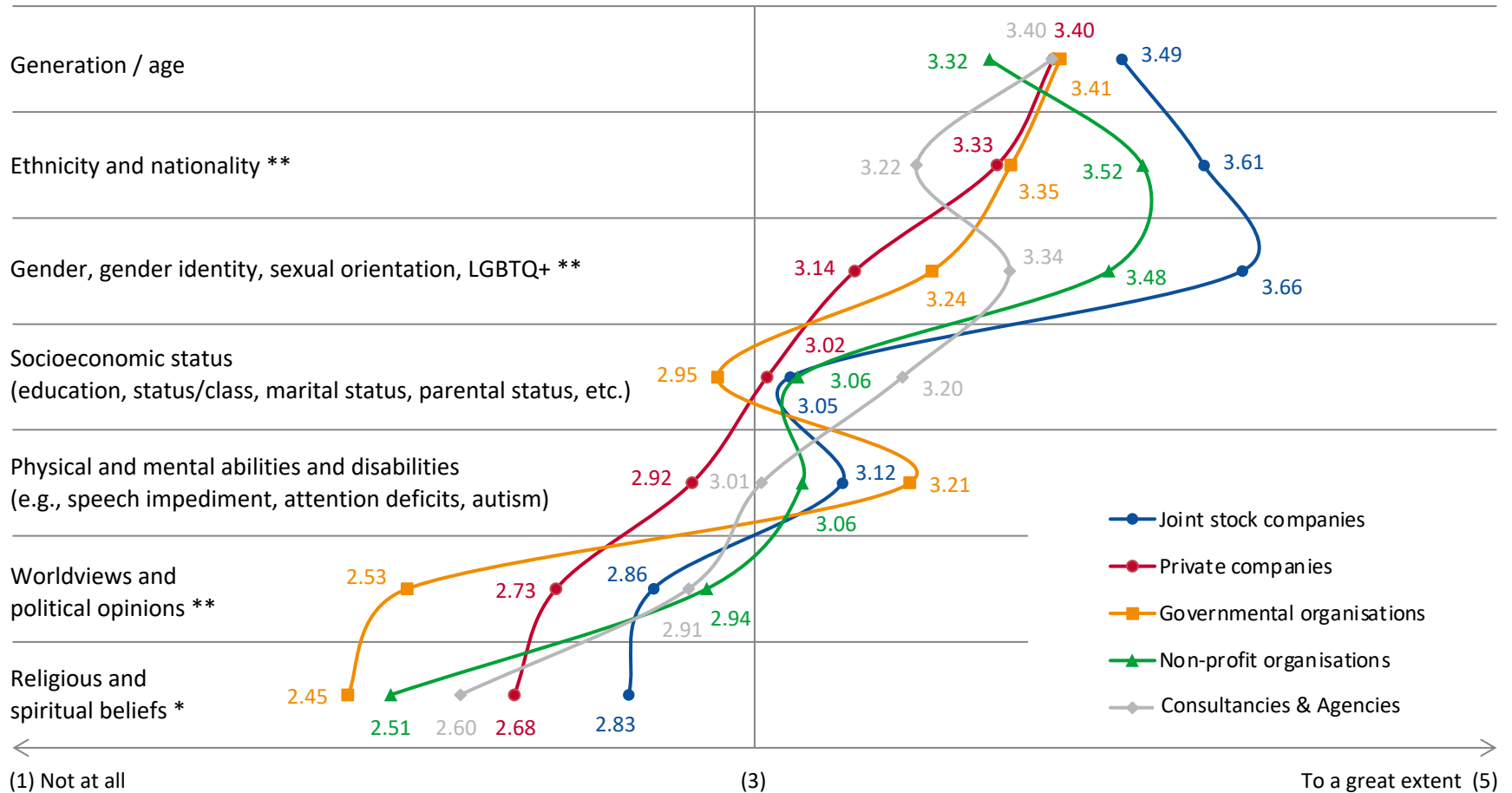
Dimensions of diversity considered in communication initiatives of organisations



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,609 communication professionals. Q 12: Taking care of diversity might impact content creation as well as the selection of channels and platforms in organisational and corporate communications. To what extent are the following dimensions of diversity considered in the communication initiatives of your organisation? Scale 1 (Not at all) – 5 (To a great extent). Frequencies based on scale points 4-5.

Embracing diversity, equality and inclusion in communications means something different depending on the type of organisation

Dimensions of diversity considered in communication initiatives of organisations



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,609 communication professionals. Q 12: To what extent are the following dimensions of diversity considered in the communication initiatives of your organisation? Scale 1 (Not at all) – 5 (To a great extent). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01). * Significant differences (ANOVA, p ≤ 0.05).

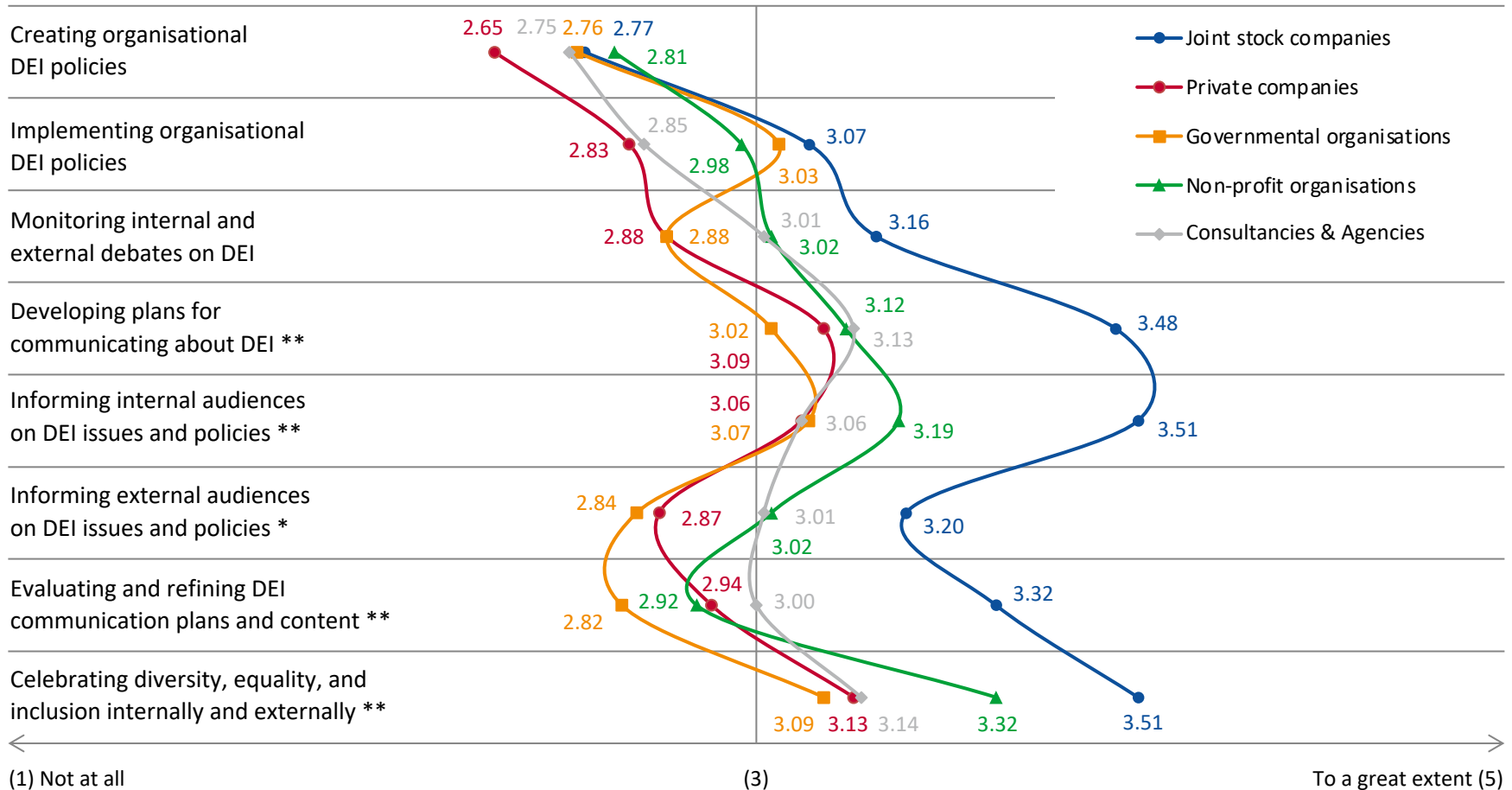
Communication departments and agencies are heavily involved in celebrating and talking about DEI initiatives, but only a third are involved in managing such policies

Responsibilities of communication units for DEI initiatives



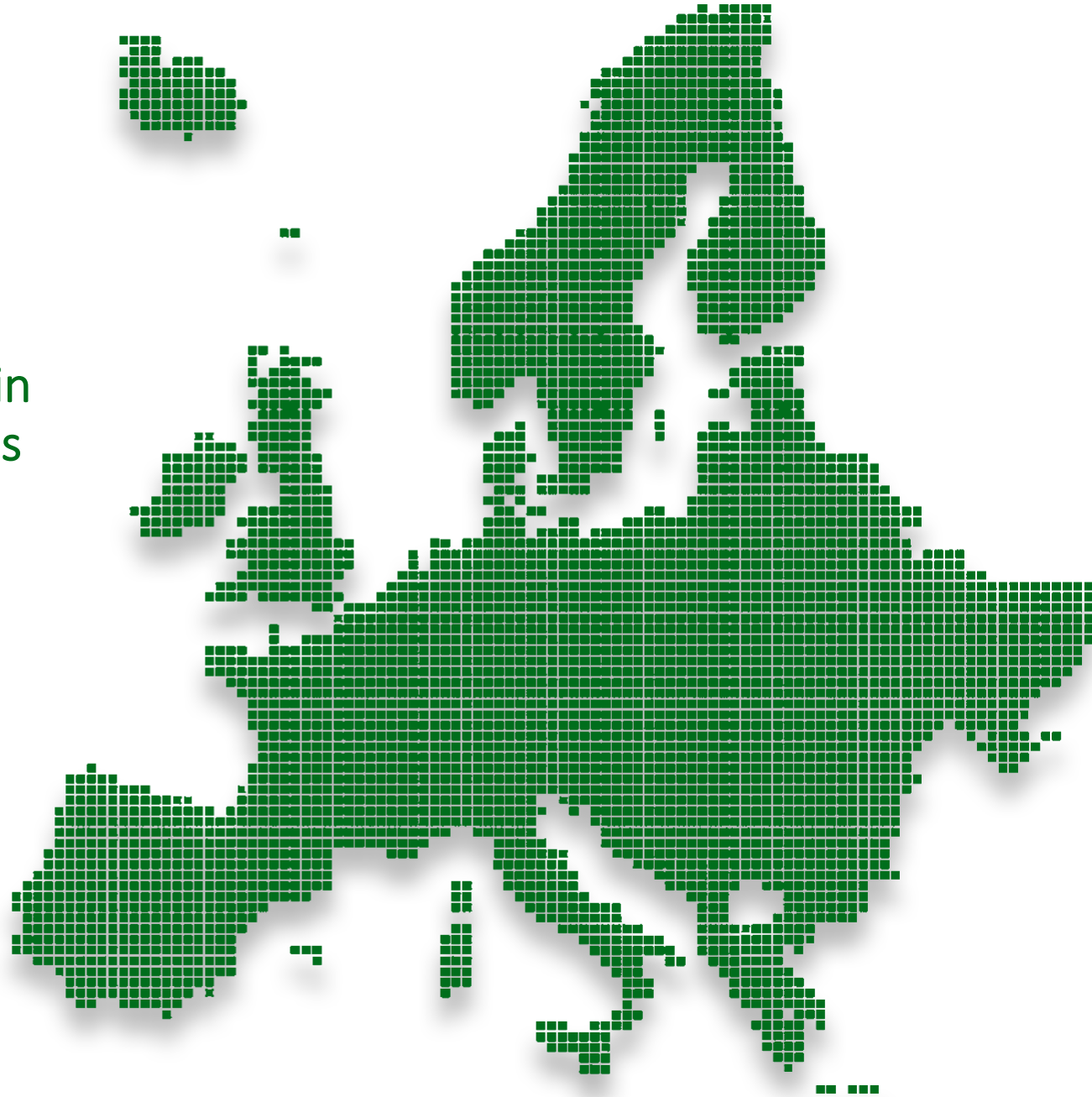
Communication professionals in joint stock companies are more involved in all forms of DEI activities compared to colleagues in other organisations

Responsibilities of communication units for DEI initiatives



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,609 communication professionals. Q 13: To what extent does your department or agency actively engage in establishing or communicating diversity, equality, and inclusion (DEI) policies for your organisation or clients in the following ways? Scale 1 (Not at all) – 5 (To a great extent). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01). * Significant differences (ANOVA, p ≤ 0.05).

Empathic leadership in
communication teams



Empathic leadership in communication teams

During times of crisis, such as the COVID-19 pandemic, there have been arguments that leaders of organisations communicate with greater empathy. Is this also true for communication leaders? This survey explores this phenomenon alongside the effect empathic leadership has on mental health, commitment and wellbeing.

Several theories suggest that the ability to have and display empathy is an important part of effective and servant leadership (Greenleaf, 1970; Spears, 2002). Empathy enables leaders to show individualised levels of consideration to followers (e.g., Avolio & Bass, 1995), to recognise emotion in others (Rubin et al., 2005) and to be aware both of themselves and of the context (Walumbwa et al., 2008). Furthermore, empathic communication enables leaders to connect with and respond to various stakeholders (Dolamore, 2021). They are rated by their subordinates and perceived by bosses as better performers (Sadri et al., 2011).

Empathy refers to ‘standing in the shoes’ of another person and attempting to see the world from that person’s point of view. Empathic leaders demonstrate that they truly understand what followers are thinking and feeling. When a leader shows empathy, it is confirming and validating for the follower. It makes the follower feel unique. We used and adapted the established Emotional Competence Inventory by Boyatzis et al. (2000) to research various dimensions of empathic leadership in this survey.

Results show that three out of four practitioners (73.3%) have experienced empathic traits from communication leaders with the majority of respondents (56.7%) stating this has increased in the last year during the pandemic. The top three ways that leaders show empathy are 1) in caring about the personal well-being of others and showing sensitivity and understanding, 2) identifying team members’ strengths and limitations, and 3) by paying attention with good listening skills. By showing empathy in this way leaders are strengthening their team’s organisational commitment (Meyer & Allen, 1997). The findings also show that communicators overall are committed to their organisations (working for the organisation having a great deal of personal meaning, 68.1%; strong sense of belonging 65.5%; personal attachment to the organisation, 65.2%). Similarly, the respondents are generally highly engaged by their work, as indicated by measures representing the dimensions of vigour, dedication and absorption (Schaufeli & Bakker, 2004).

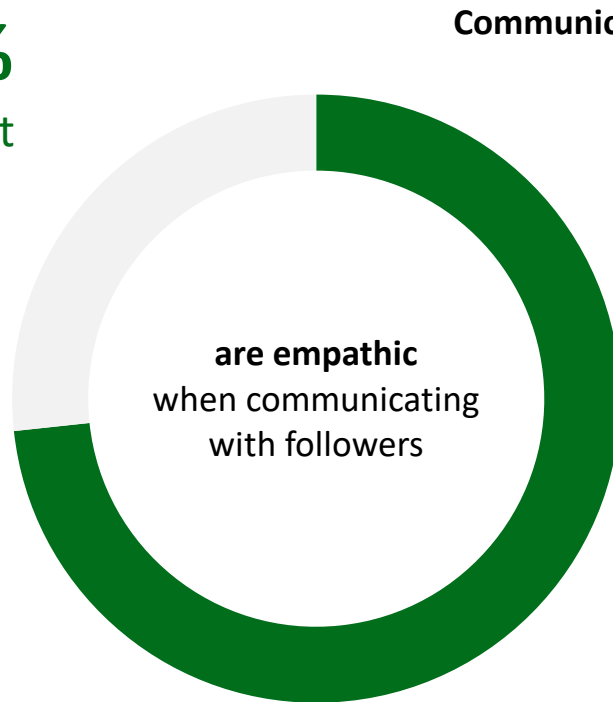
When considering the important dimension of mental health (van Dierendonk et al., 2001) which has been much debated across society during the pandemic years, there is clear evidence that many communicators feel tired from their work (37.0%) but the vast majority feel able to handle their jobs despite the weight of these demands (80.3%). Perhaps the most encouraging figure is that only 1% are at risk of burnout. The type of organisation in which one works also plays a role: Agency employees and consultancy staff report higher engagement, stronger commitment to their organisation and better mental health. When it comes to mental health by gender, women appear more likely to suffer problems and also indicate less commitment to their employers.

The most important takeaway is that practitioners working for an empathic leader in a communication department or agency are significantly more committed and engaged and display better mental health levels. This is a strong argument for developing leadership competencies and team culture in this direction.

Three out of four communication professionals experience their direct leader as empathic – every second says that empathy has increased during the last year

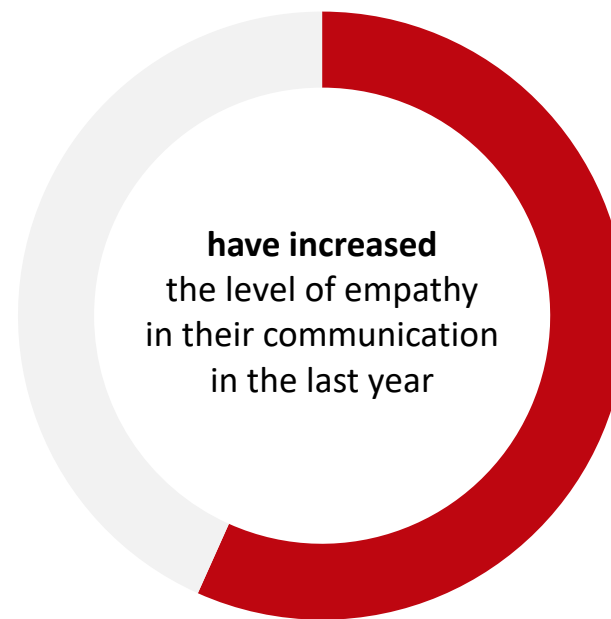
73.3%

Agreement



56.7%

Agreement

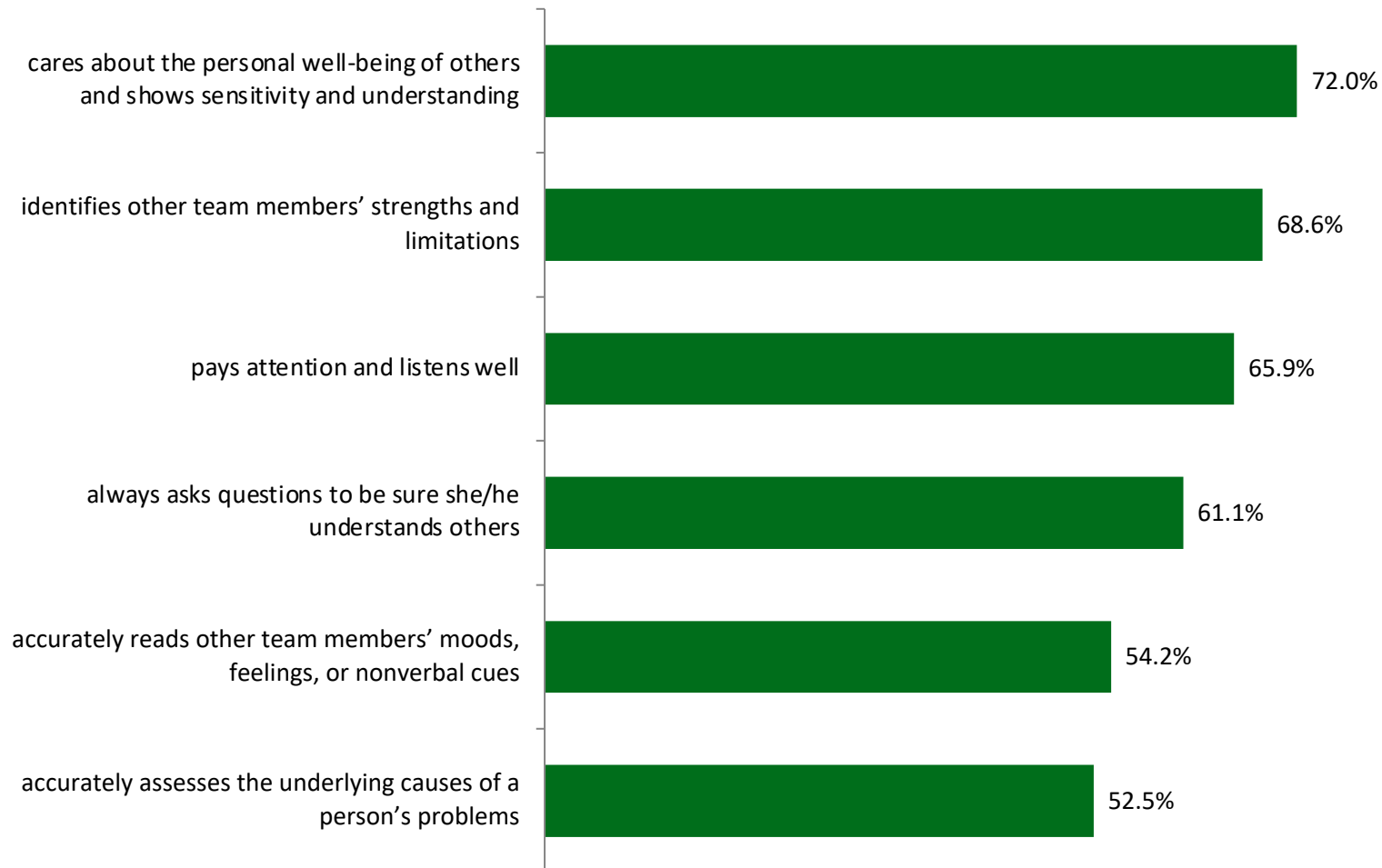


No significant differences between female and male leaders

www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,623 communication professionals. Q 14: During the COVID-19 pandemic and additionally in response to new demands from younger generations, many leaders in organisations have changed their communication styles and humanized the way they interact. Also many heads of communication departments and agencies show empathy when connecting to their teams, i.e. by trying to understand other people's feelings and emotions, and by putting themselves in someone else's shoes and taking an active interest in their concerns. When thinking of your own organisation: To what extent do you agree with the following? Scale 1 (Strongly disagree) – 5 (Strongly agree). Top communicators who do not report to a leader were asked for a self-assessment. Frequencies based on scale points 4-5. Q 31: What is the gender of your direct communication leader / supervisor? / n = 1,289 / 48.7% report to a female and 51.3% to a male leader / Self-assessment results are excluded in the gender comparison.

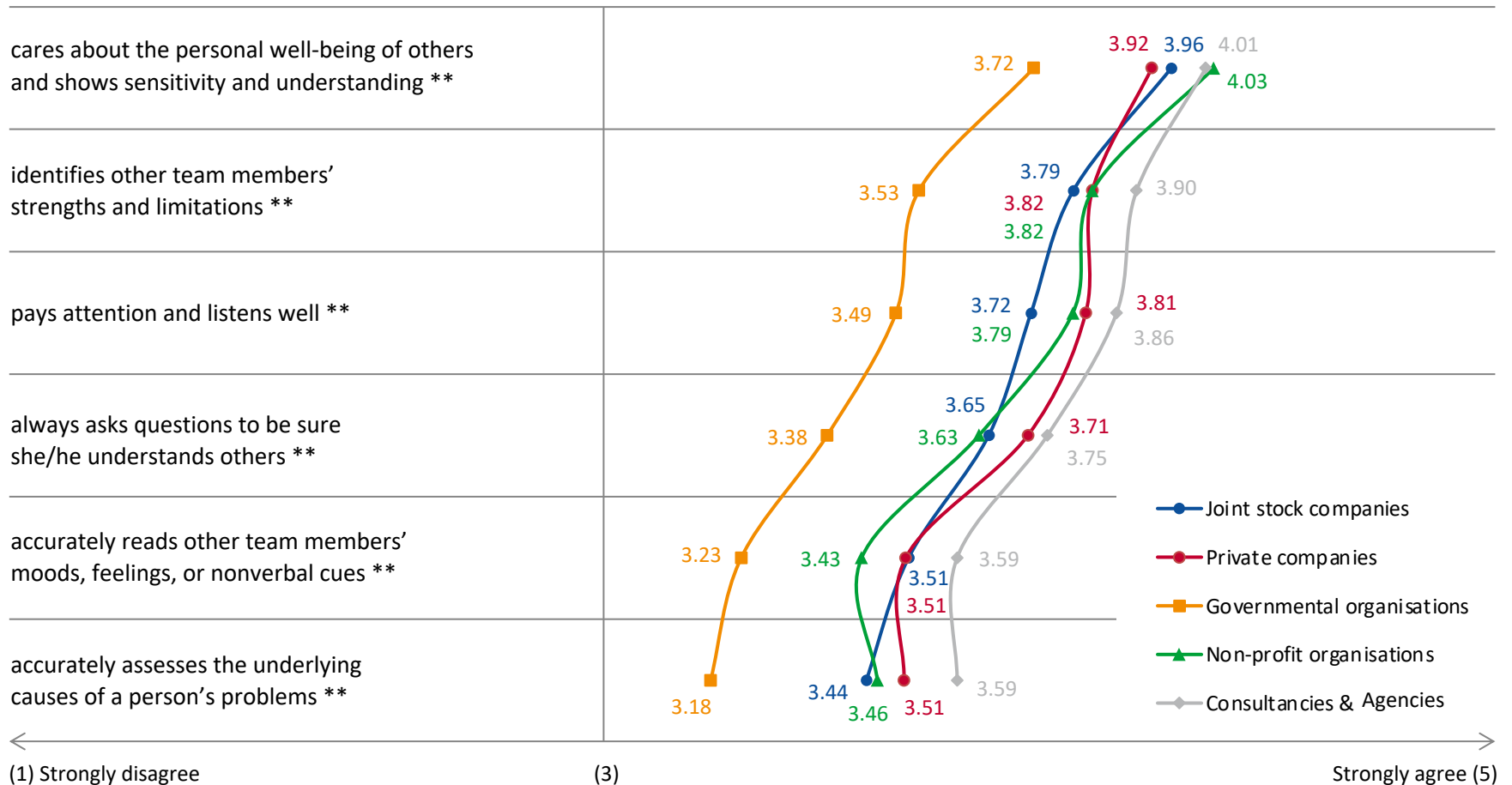
How communication leaders show empathy

The communication leader ...



Striking differences in empathic leadership across organisations with governmental organisations clearly lagging behind companies, NGOs and agencies

The communication leader ...



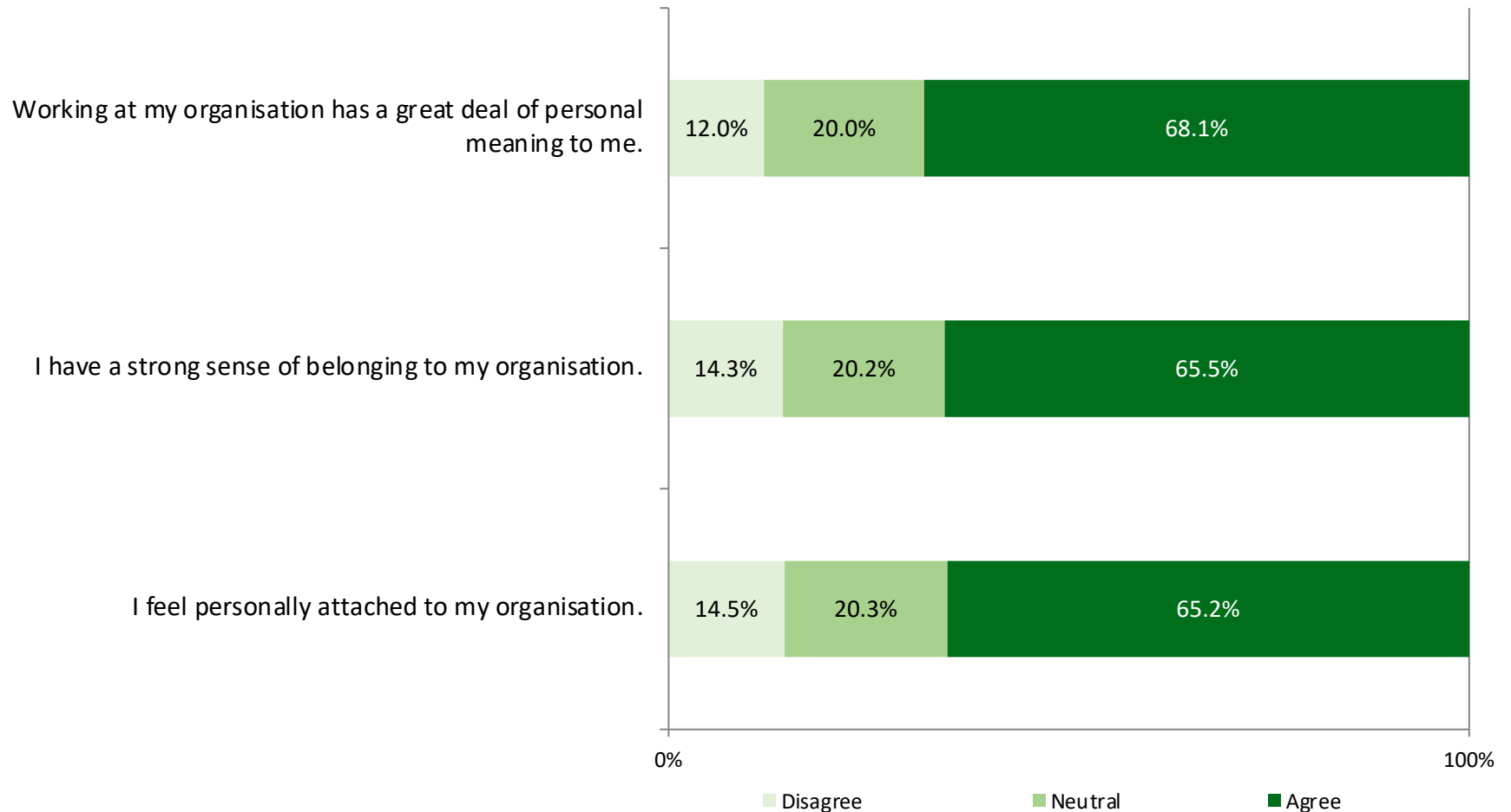
Commitment: Empathic communication leaders strengthen the bond of their team members towards the organisation significantly



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,623 communication professionals. Q 15: And to what extent do you agree with the following? Scale 1 (Strongly disagree) – 5 (Strongly agree). Q 16 (items 8-10): The rise of empathy in communications might impact communication practitioners' work environment. Thinking of your daily work as a communication practitioner, to what extent would you agree with the following? Scale 1 (Strongly disagree) – 5 (Strongly agree). ** Model / predictor highly significant ($p \leq 0.01$). * Predictor significant ($p \leq 0.05$).

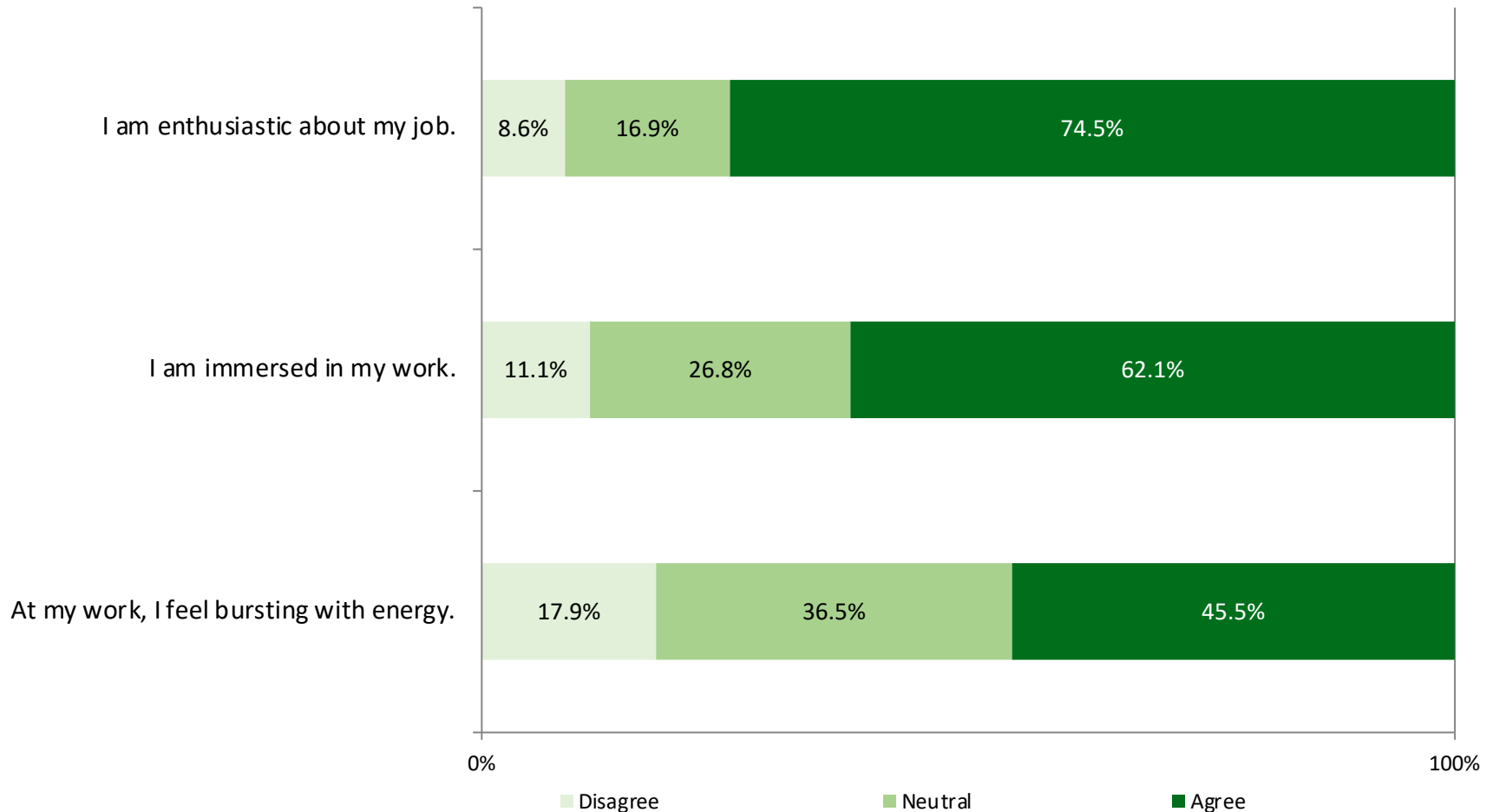
Two out of three communication professionals show strong commitment to the organisation they currently work for

Organisational commitment, measured with three items



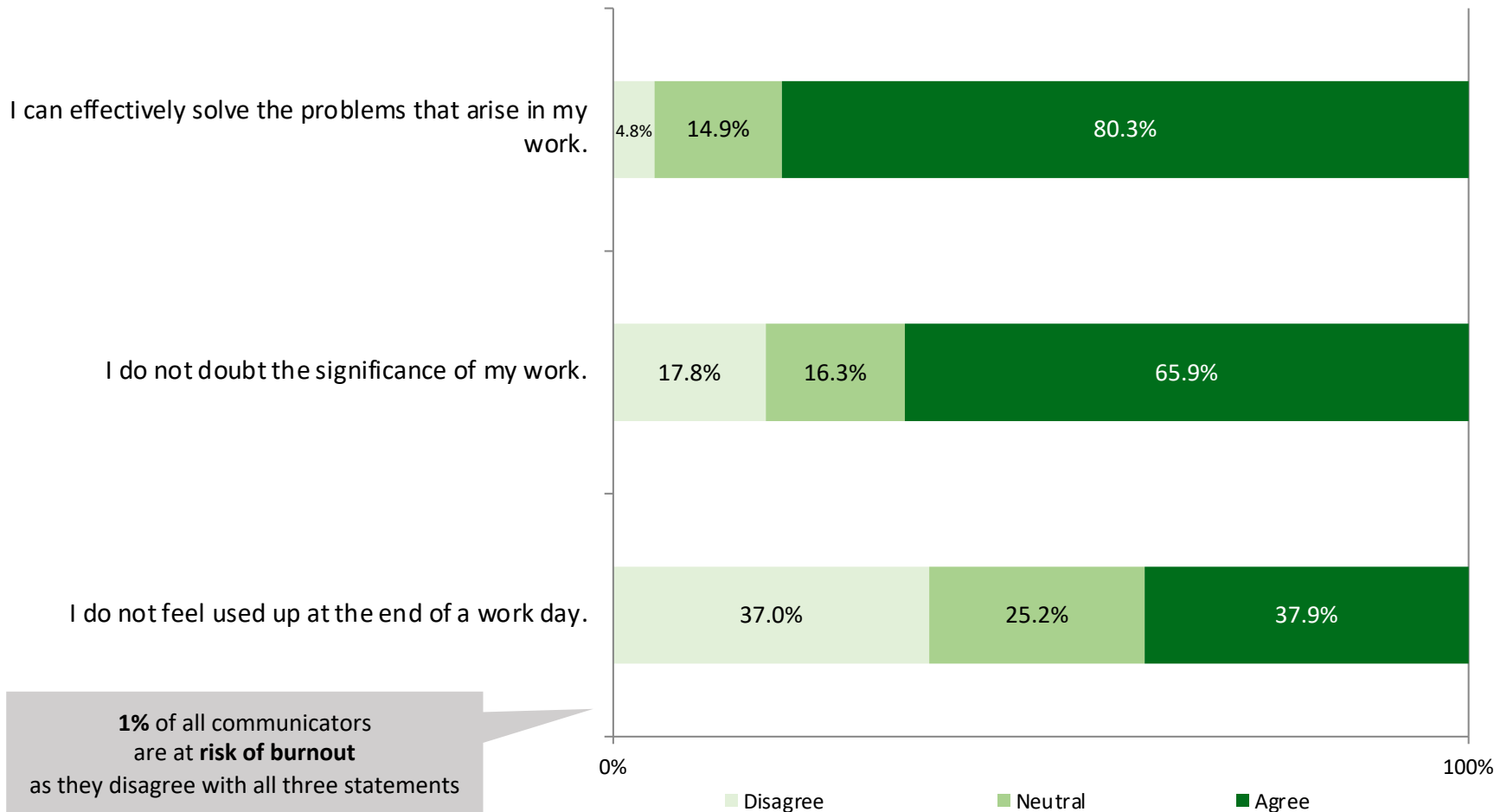
Work engagement among communicators is notably high, but its dimensions are assessed differently

Work engagement, measured with three items



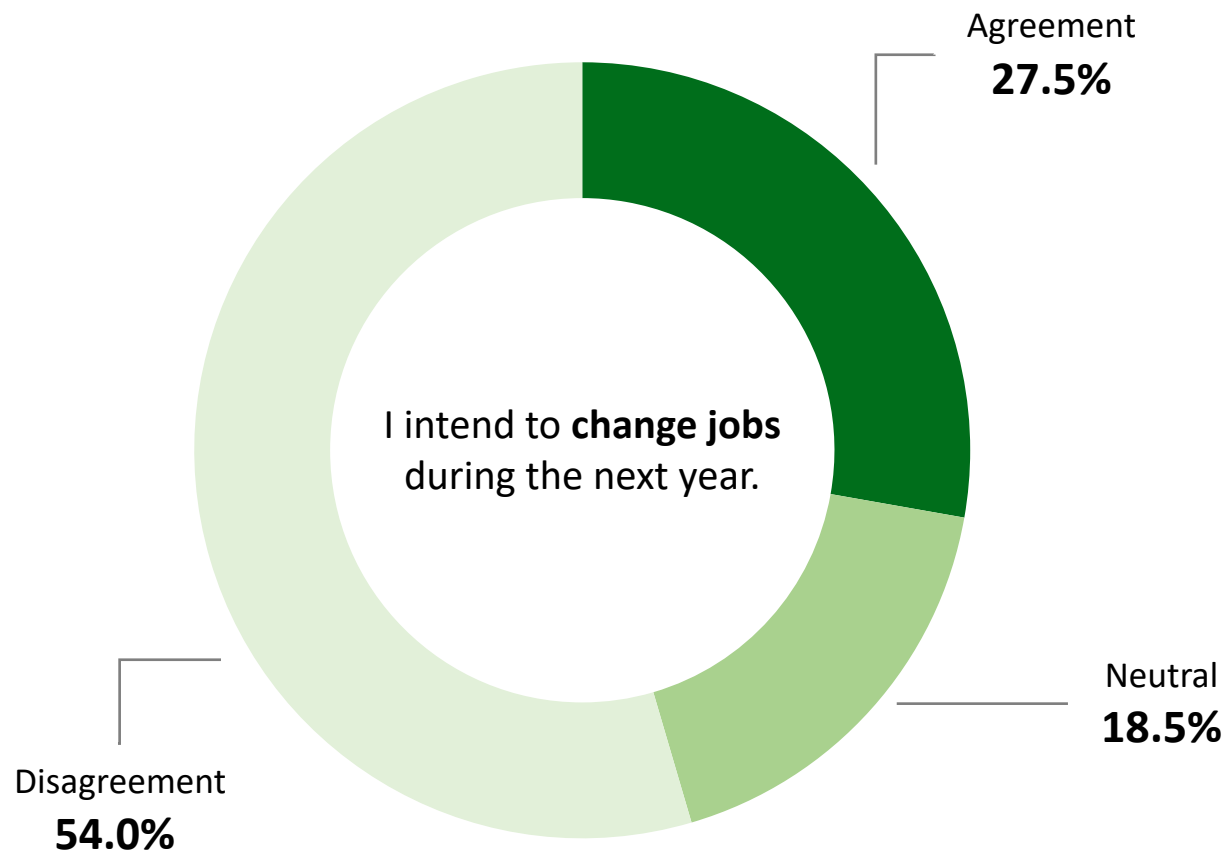
Mental health: Although many communicators feel exhausted by the end of a typical workday, the vast majority find themselves capable to handle their job

Mental health, measured with three items



Turnover intention: More than half of communication professionals are satisfied with their current position, but one out of four plans to apply for a different job

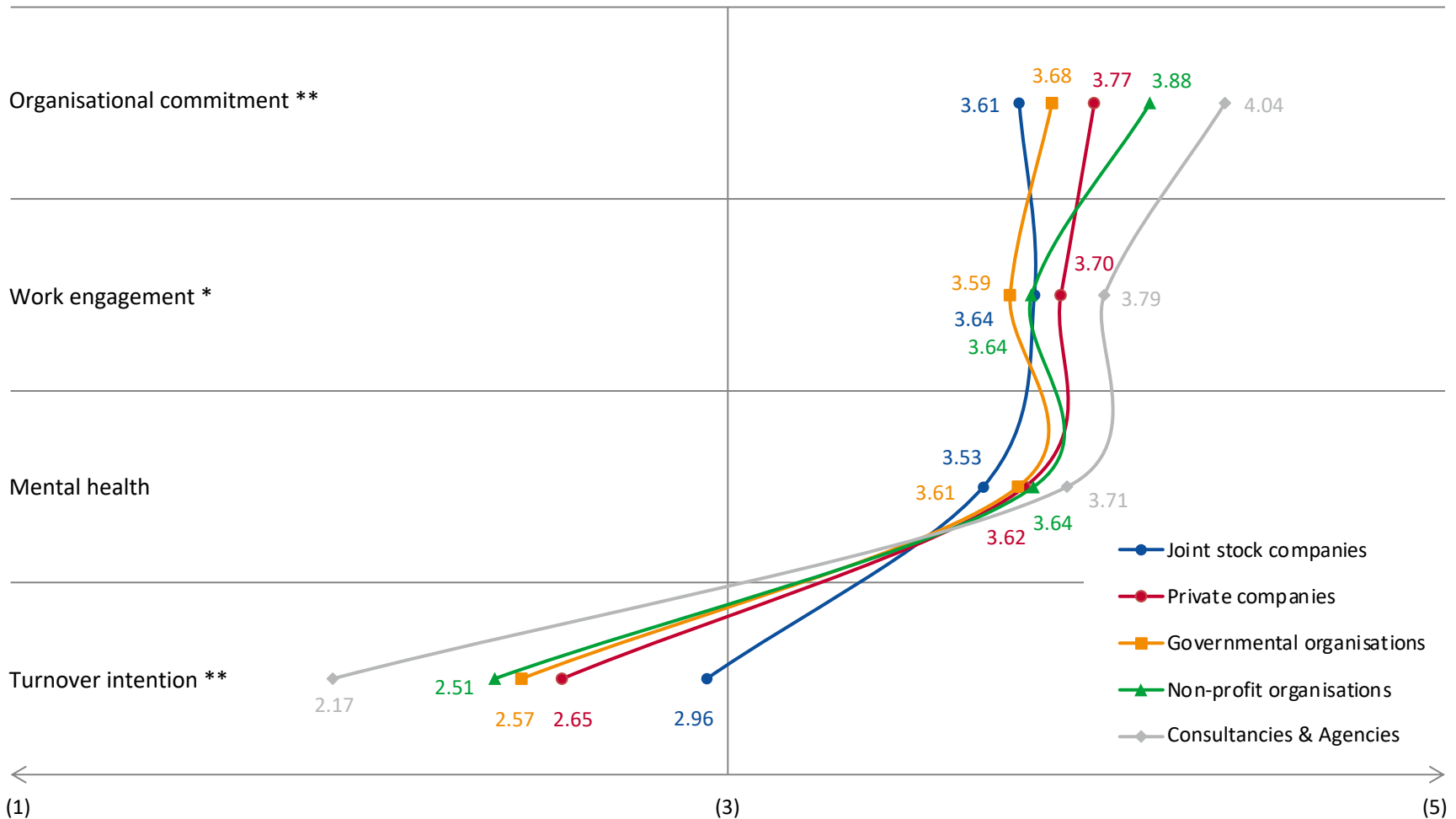
Turnover intention



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,672 communication professionals. Q.16 (item 7): Thinking of your daily work as a communication practitioner, to what extent would you agree with the following? Scale 1 (Strongly disagree) – 5 (Strongly agree).

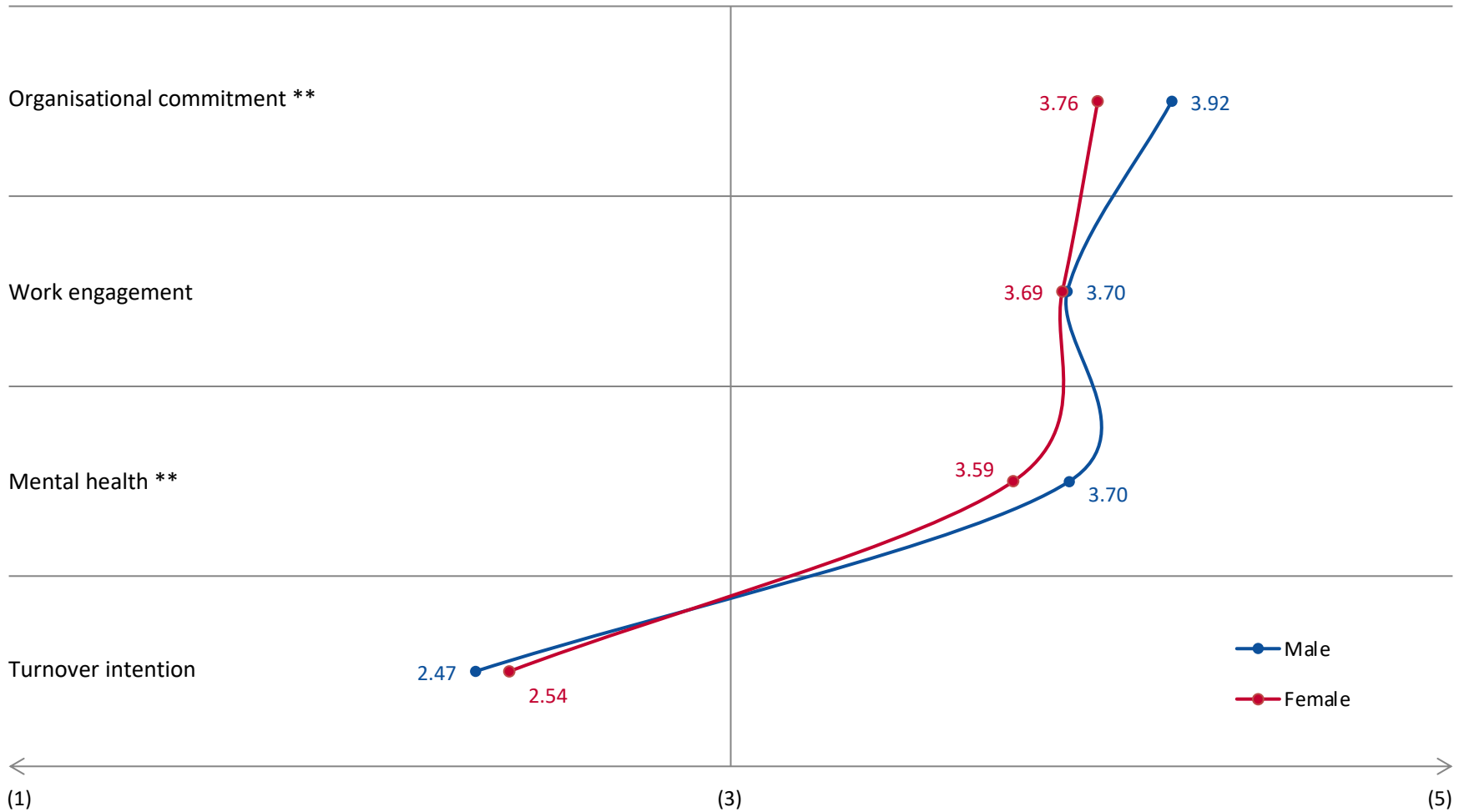
Disagree: scale points 1–2; neutral: scale point 3; agree: scale points 4–5.

Communication professionals working in consultancies and agencies report stronger commitment, higher engagement and better mental health



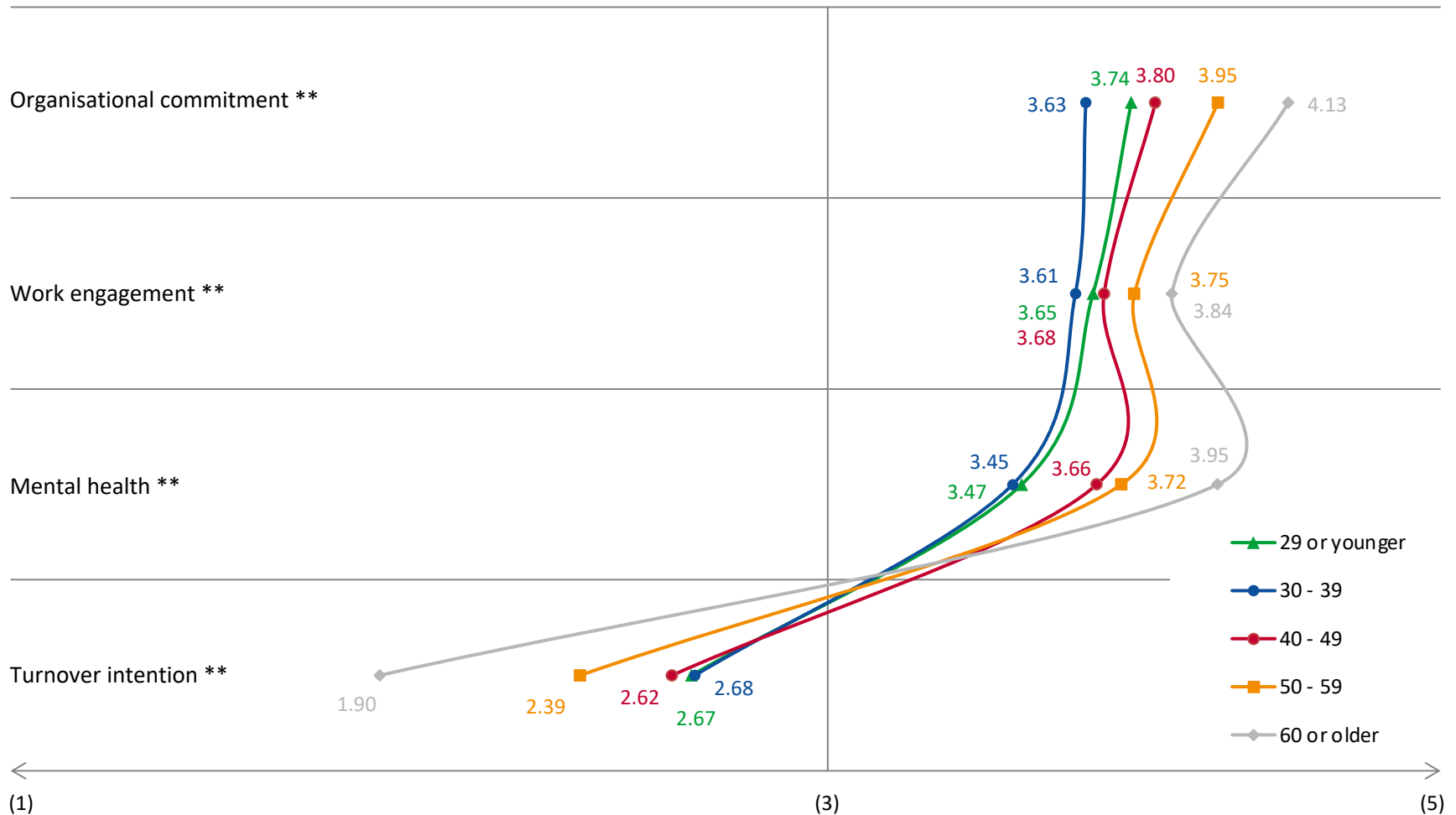
www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,672 communication professionals. Q 16: Thinking of your daily work as a communication practitioner, to what extent would you agree with the following? Scale 1 (Strongly disagree) – 5 (Strongly agree). Mean values of indices. ** Highly significant differences (ANOVA, $p \leq 0.01$). * Significant differences (ANOVA, $p \leq 0.05$).

Female communicators are more likely to suffer from mental health problems and they indicate less commitment to their organisation



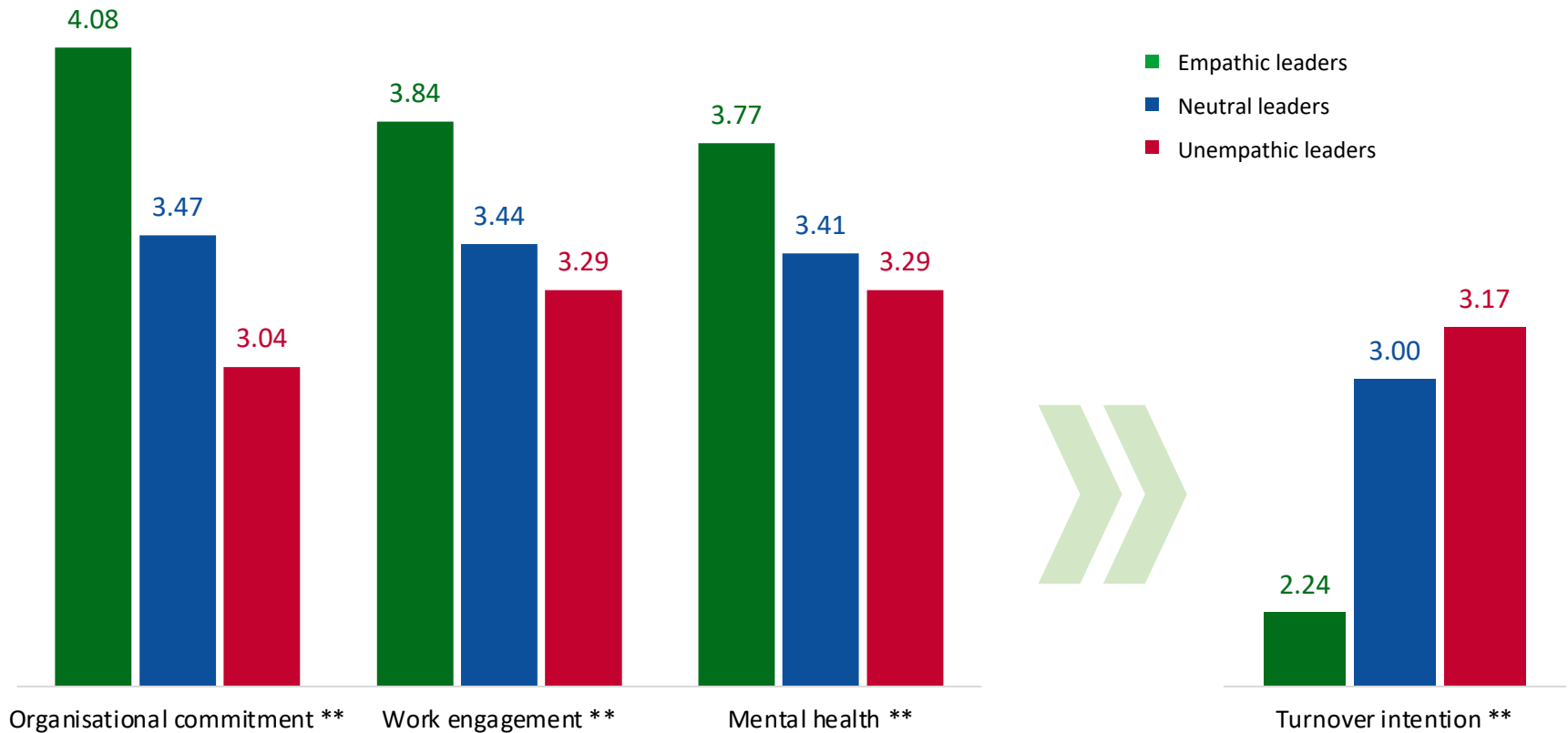
www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,664 communication professionals. Q 16: Thinking of your daily work as a communication practitioner, to what extent would you agree with the following? Scale 1 (Strongly disagree) – 5 (Strongly agree). Mean values of indices. ** Highly significant differences (independent samples T-Test, $p \leq 0.01$).

Younger communications professionals are less satisfied; they articulate lower engagement and higher turnover intentions compared to older colleagues



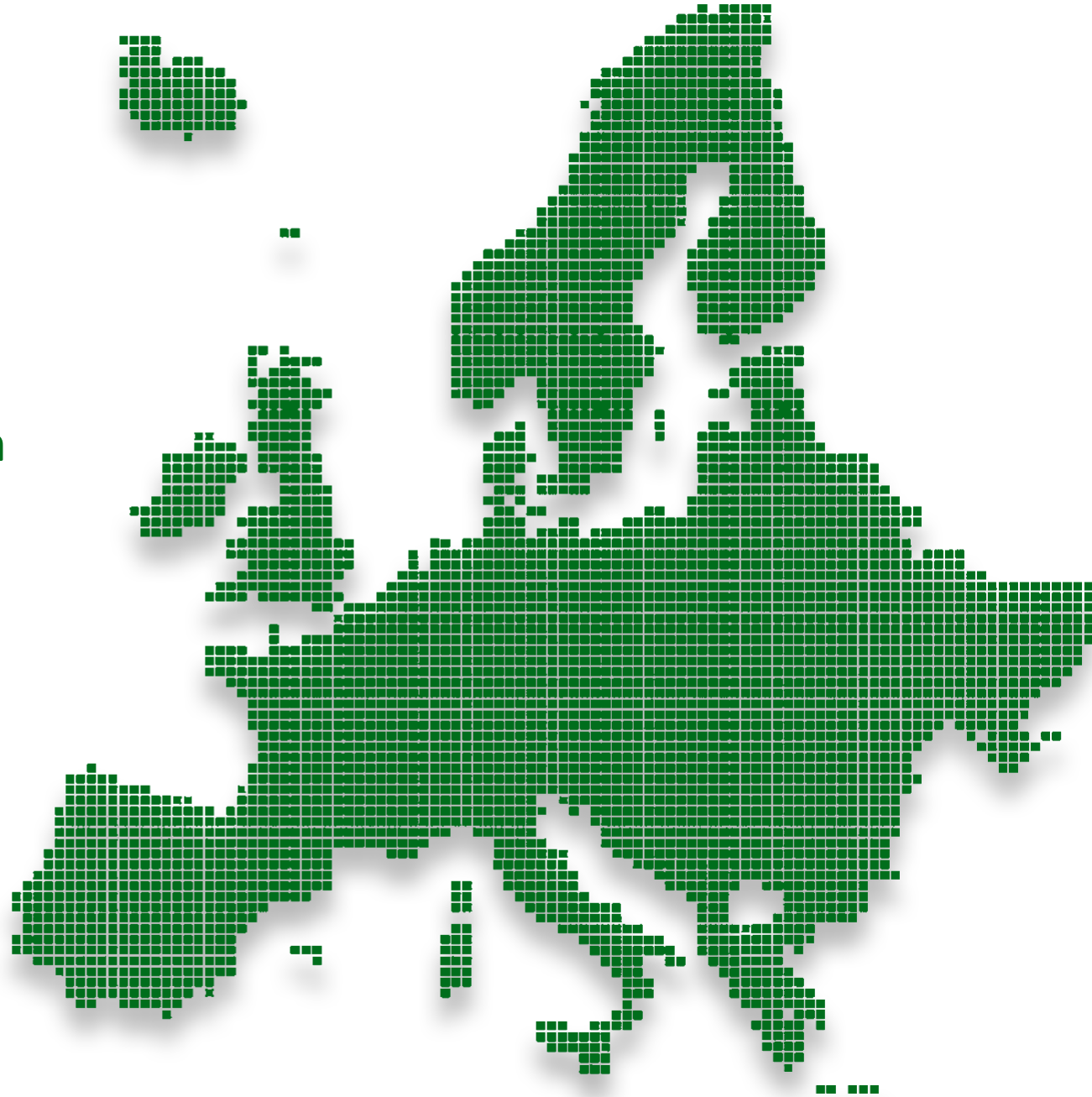
www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,672 communication professionals. Q 16: Thinking of your daily work as a communication practitioner, to what extent would you agree with the following? Scale 1 (Strongly disagree) – 5 (Strongly agree). Mean values of indices. ** Highly significant differences (Pearson correlation, $p \leq 0.01$).

Empathic leadership makes the difference: Significantly better commitment, engagement and mental health levels when working for an empathic leader



www.communicationmonitor.eu / Zerfass et al. 2021 / n = 1,623 communication professionals. Q 16: Thinking of your daily work as a communication practitioner, to what extent would you agree with the following? Scale 1 (Strongly disagree) – 5 (Strongly agree). Mean values of indices. ** Highly significant differences (Kendall rank correlation, $p \leq 0.01$). Sample split in professionals with empathic, neutral and unempathic leaders based on index of all items in Q 15 (index value > 3.50 = empathic leader; $3.50 \geq \text{index value} \geq 2.50$ = neutral leader; index value < 2.50 = unempathic leader).

CommTech and the digital transformation of communications



CommTech and the digital transformation of communications

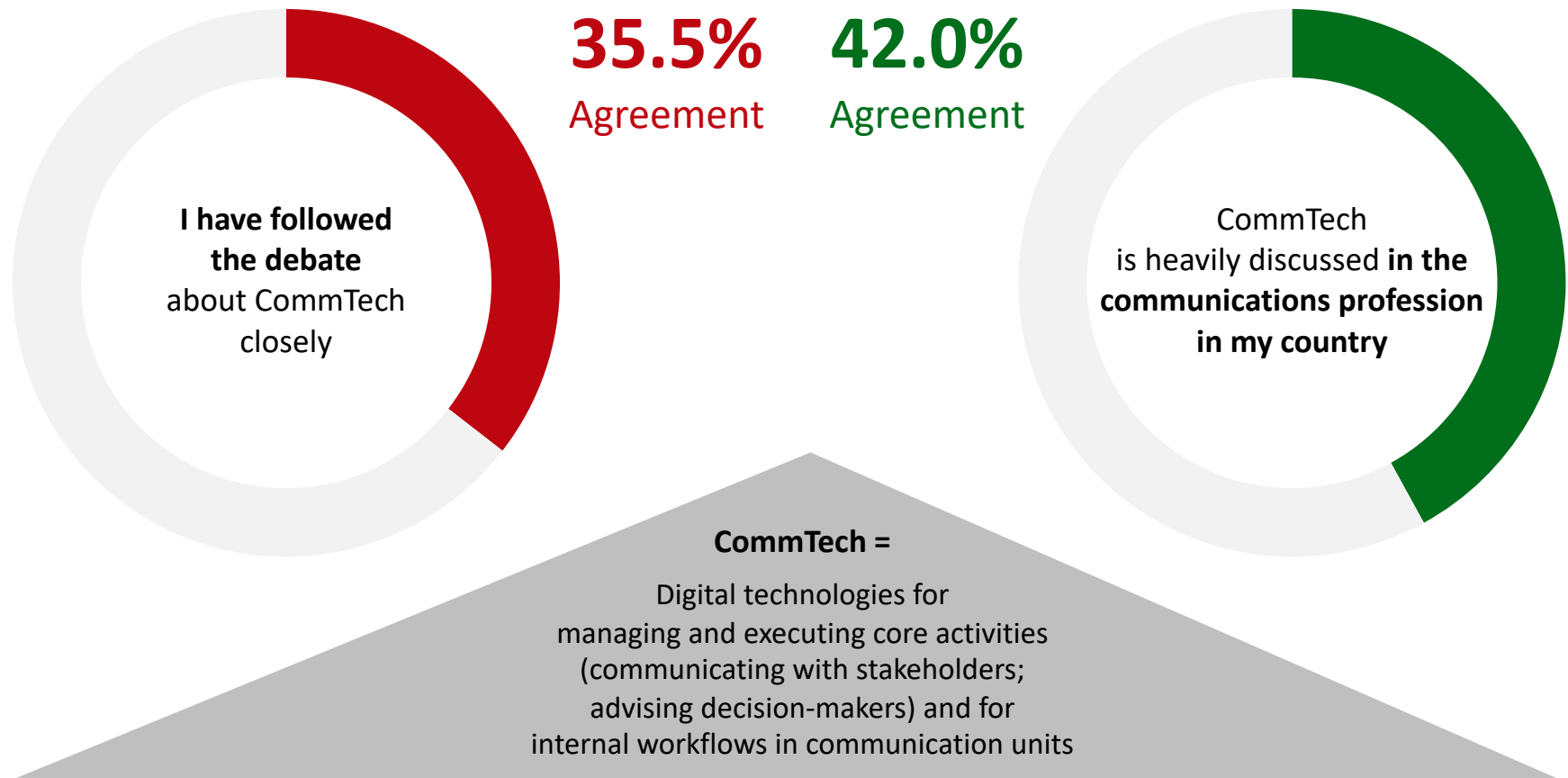
Digitalisation is both a trigger and the backbone for the rapid transformation of communication departments, consultancies and agencies (Luoma-Aho & Badham, 2023). Although this is anything but new, the topic has recently been the subject of intense international discussion in the profession and in academia. Many practitioners are overwhelmed by the plethora of new digital tools, especially software and services, that promise to ease their work with the help of artificial intelligence (Buhmann & White, 2022; Moore & Hübscher, 2022; Zerfass et al., 2020a). Neighbouring disciplines like marketing have long begun to explore the related challenges and opportunities: almost 10,000 different applications are subsumed today under the concept of 'MarTech' (Brinker, 2022). A similar debate on 'CommTech' has been initiated by practitioners (Arthur W. Page Society, 2021; Weiner, 2021) and researchers (Zerfass et al., 2021a). Digital technologies can be used by communication units for their core activities (stakeholder communication, e.g., via social media, chatbots, Avatars; advising internal and external clients, e.g., based on big-data analyses) and for supporting functional workflows (e.g., digital asset management). Generic workflows like team collaboration are supported by cross-functional solutions (MS Teams, Zoom, etc.) (Zerfass & Brockhaus, 2023). Nevertheless, empirical studies show that the communications profession is immature in all dimensions (Brockhaus et al., 2022).

We wanted to find out the reasons for this disappointing situation, assess the current status quo, and identify ways forward. A first, rather surprising finding of this study is that only one third (35.5%) of communication professionals across Europe have followed the debate on CommTech closely and that only a small majority (up to 55.2%) believe that these technologies will change the communication profession, the communication departments or agencies they work for and the way they personally work. But there are huge differences between countries, with no clear regional tendency. Interestingly, communicators who have followed the debate tend to see the benefits of CommTech in all the areas mentioned above. However, when it comes to assessing the risks, there is no significant difference to uninformed practitioners: one third of all respondents think that CommTech has disadvantages for stakeholder communication, internal consultation or workflows.

The reluctance at the individual level of communicators corresponds with a moderate level of digitalisation at the meso level of communication departments and agencies. According to this study, only very few (6.2%) of these units have digitalised all their core activities and established a very advanced use of CommTech. Apart from these innovators, many lag behind in practice and are classified as outsiders, latecomers or late majority by those working there. The biggest challenges in adopting CommTech are not technological issues (e.g., software performance) or human factors (e.g., lack of digital competencies among communicators), but factors that point to deficits within the respective organisations. Frequently, communication tasks and processes are not prepared for digitalisation (38.5%). The most common obstacles mentioned are inflexible structures and cultures, lack of support from IT departments and similar structural barriers (44.7%). However, there are differences between various types of organisations and different countries in Europe.

Looking ahead, this study shows that all players in this field (professional associations, communication departments and agencies, practitioners themselves) should become active and join forces to improve the situation. Creative ideas, convincing cases of application and strategies to motivate team members and (internal) clients to accelerate the path to digitalisation are urgently needed.

Despite the rapid digital transformation of society, the majority of communicators in Europe and their communities pay little attention to CommTech

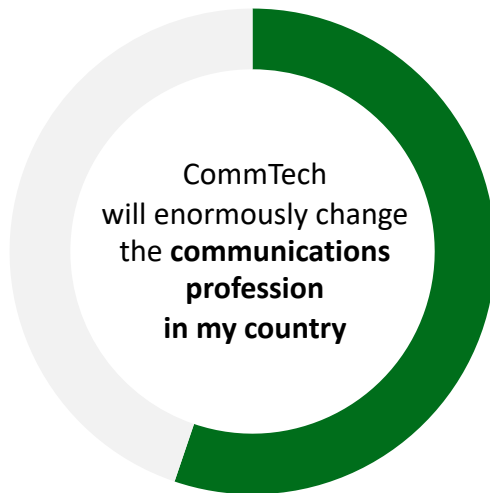


www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,412 communication professionals. Q 1: The digital transformation of communication departments and agencies seems to be a hot topic in the profession today. Industry magazines and practitioners have started to discuss about 'CommTech' to address benefits and challenges. CommTech includes digital technologies for managing and executing core activities (communicating with stakeholders; advising decision-makers) and for internal workflows in communication units. Generally speaking, what is your impression on CommTech? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequencies based on scale points 4-5.

Only a small majority of communications professionals expect CommTech to fundamentally change the profession in their country

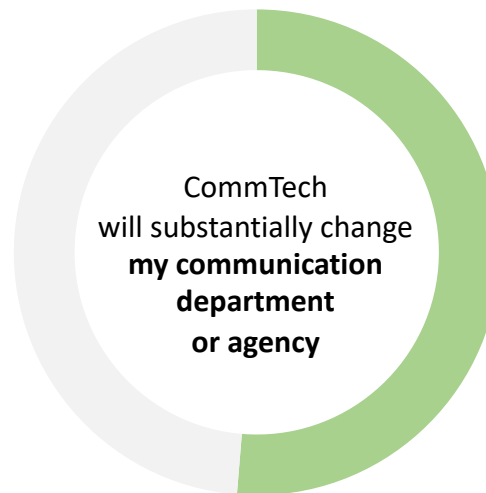
55.2%

Agreement



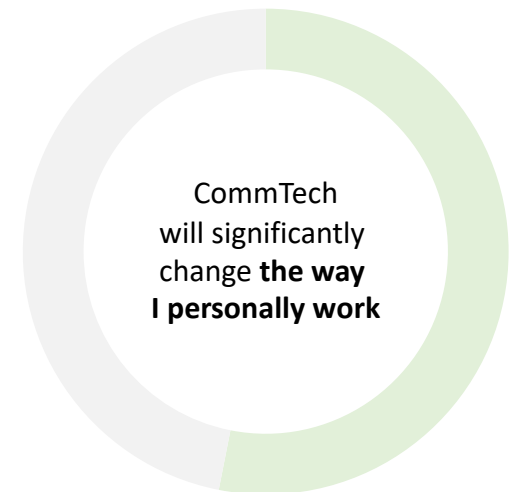
51.3%

Agreement



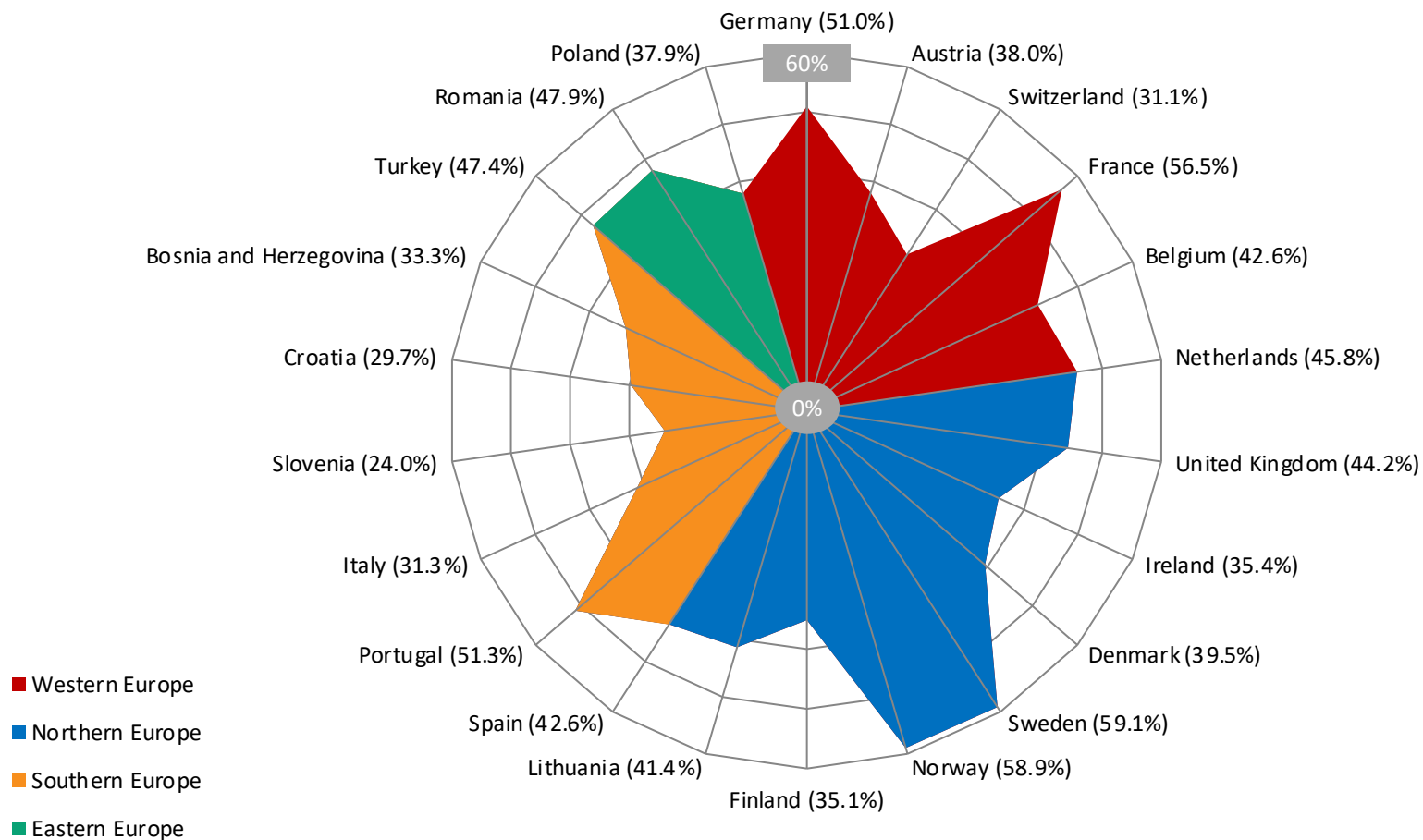
53.1%

Agreement



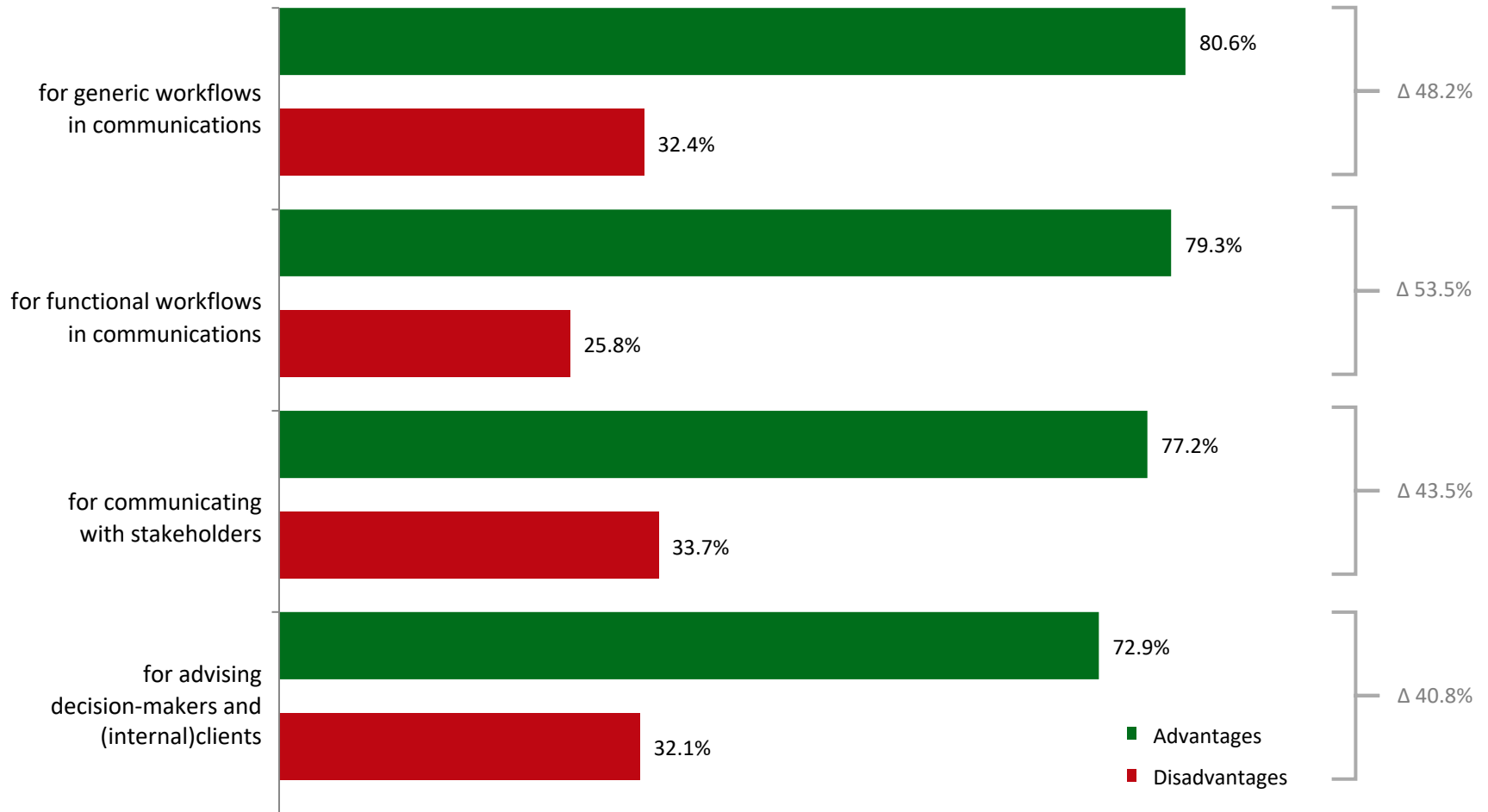
Different assessments of the impact of CommTech on the profession: Communicators in Sweden, Norway, France, Portugal and Germany see greater relevance

Impact on communications profession in the country



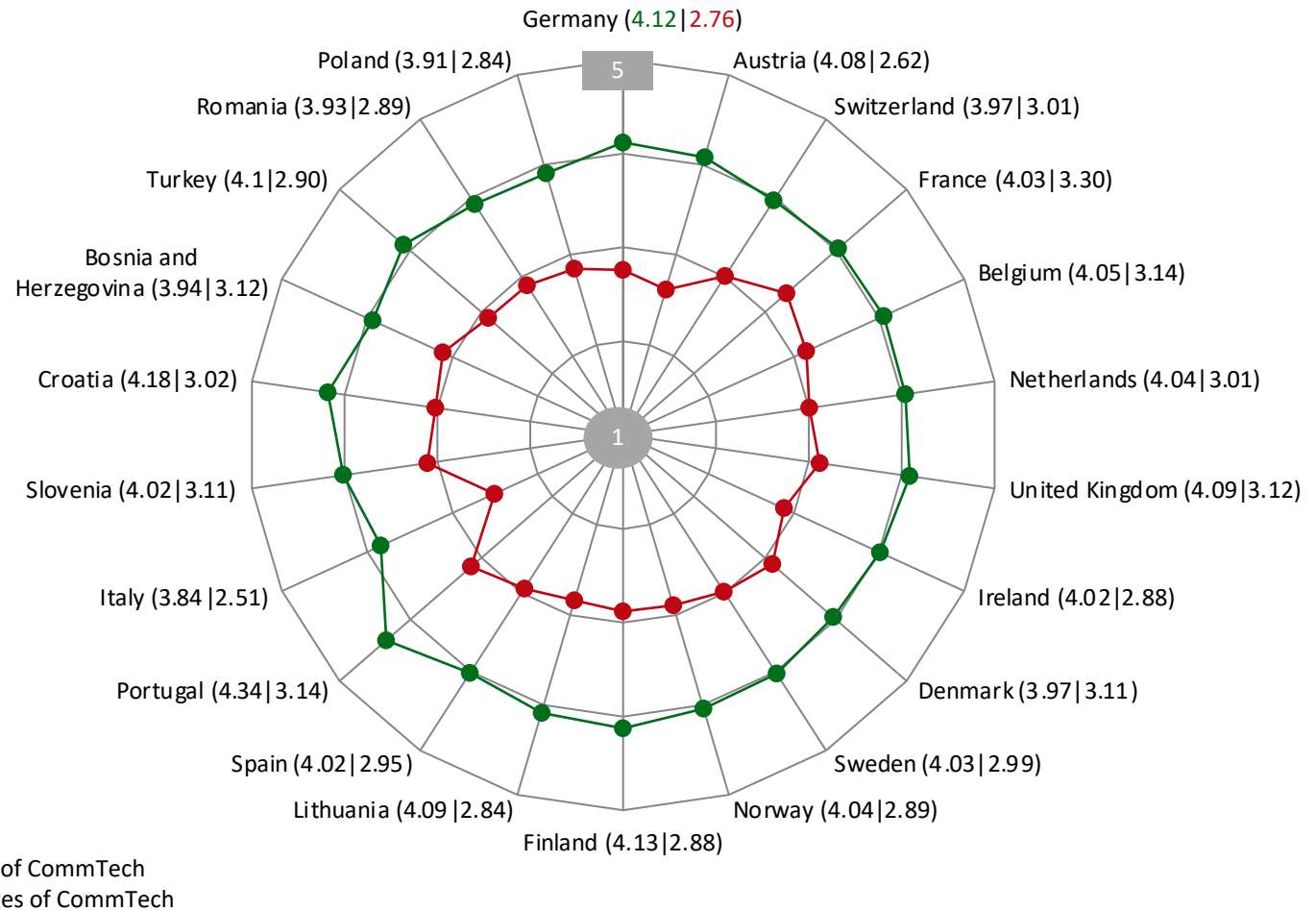
A strong majority of communicators believe that the benefits of using CommTech in different ways clearly outweigh the potential drawbacks and risks

CommTech has advantages / disadvantages ...



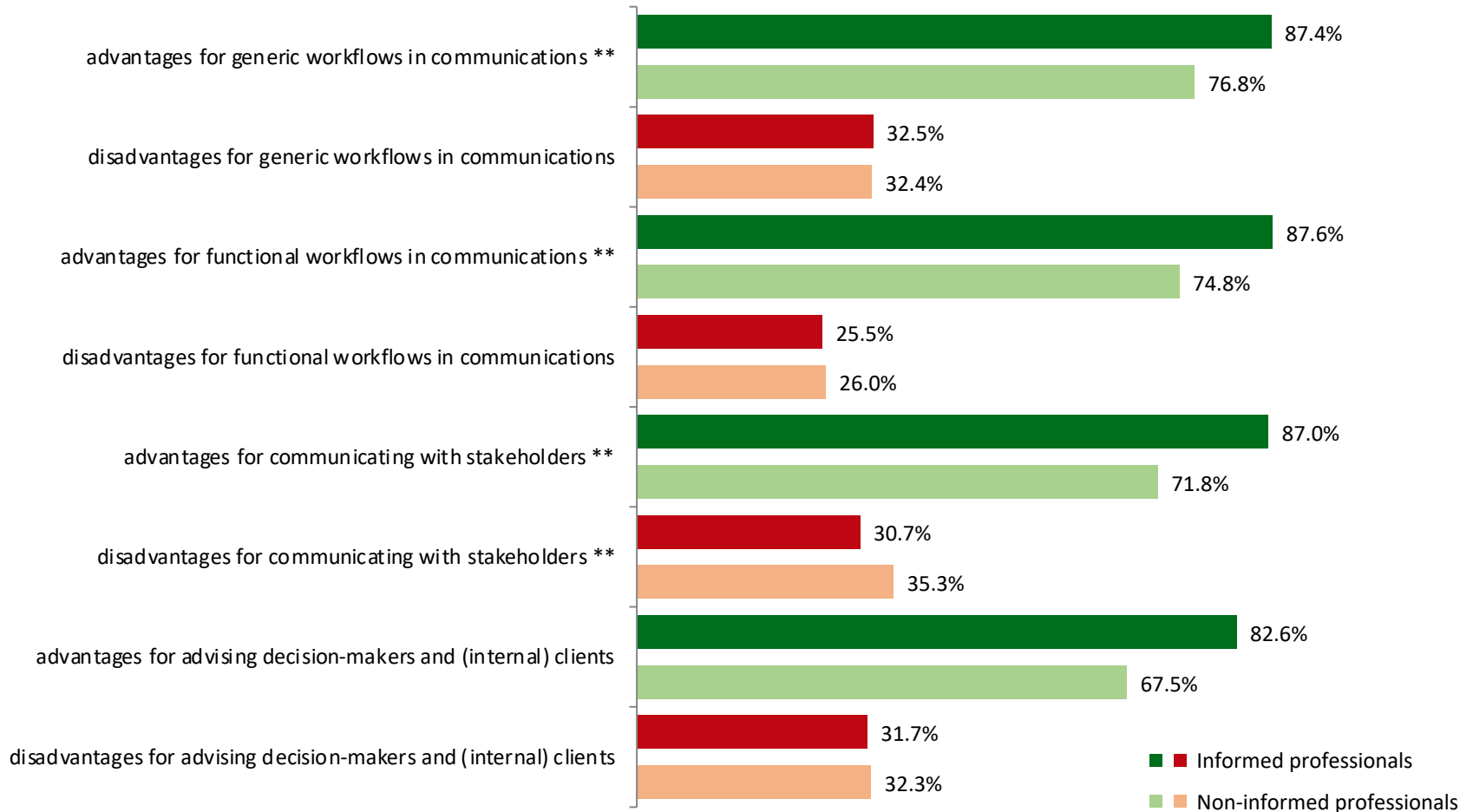
www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,412 communication professionals. Q 2: Digital technologies offer many opportunities for communication departments and agencies. But there are also disadvantages and risks. In your opinion, how will CommTech impact the following activities? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequencies based on scale points 4-5.

Advantages and disadvantages of CommTech are assessed quite similarly by communication practitioners across Europe



Communicators who have followed the debate on CommTech see more potential, while there is no difference in risk assessment to uninformed practitioners

CommTech has ...



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,412 communication professionals. Q2: In your opinion, how will CommTech impact the following activities? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequencies based on scale points 4-5. ** Highly significant differences (chi-square test, p ≤ 0.01). Sample split in informed and non-informed professionals based on Q 1 (item 2).

Status quo of digitalisation in communication departments and agencies: Much room for improvement – only a quarter are advanced

Degree of digitalisation and CommTech use in communication units across Europe



6.2% **Innovators**

Digitalisation of all core activities, highly advanced CommTech use



20.2% **Early adopters**

Digitalisation of almost every core activity, advanced CommTech use



36.7% **Early majority**

Digitalisation of many core activities, above average CommTech use



27.4% **Late majority**

Digitalisation of some core activities, average CommTech use



8.0% **Latecomers**

Digitalisation of a few core activities, below average CommTech use

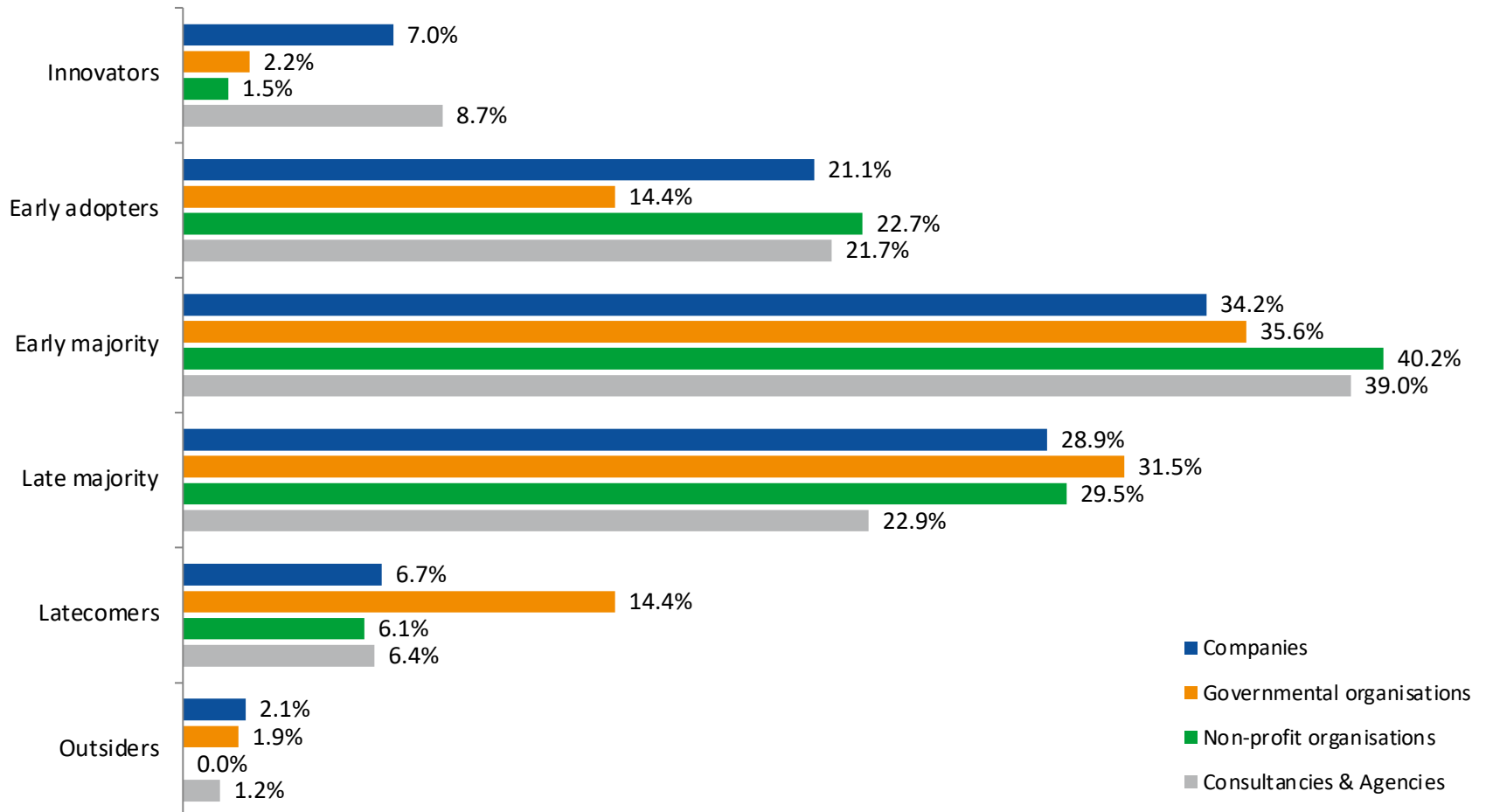


1.6% **Outsiders**

Almost no digitalisation and almost no CommTech use

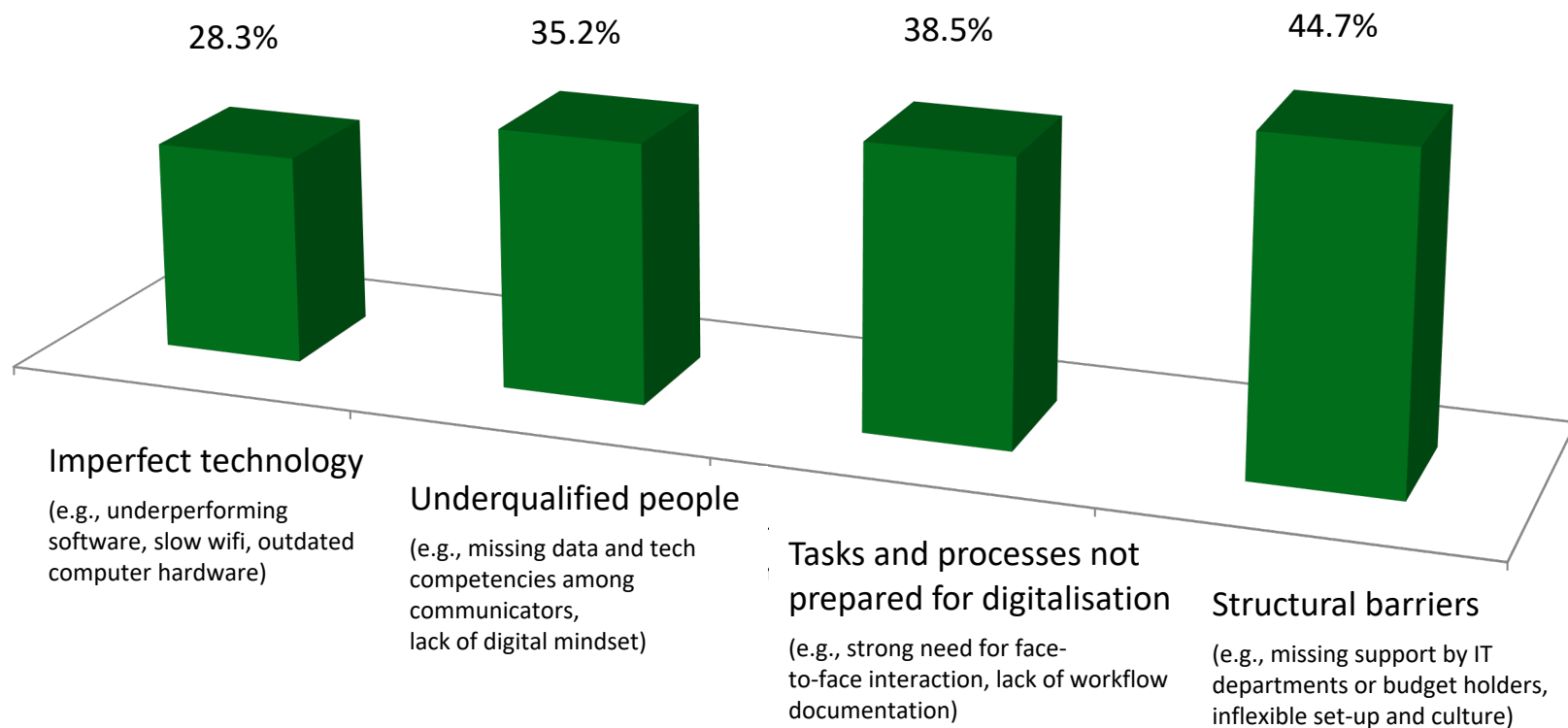
Companies and agencies are at the forefront of digitalisation and CommTech use, while governmental organisations are lagging behind

Degree of digitalisation and CommTech use in communication units across Europe



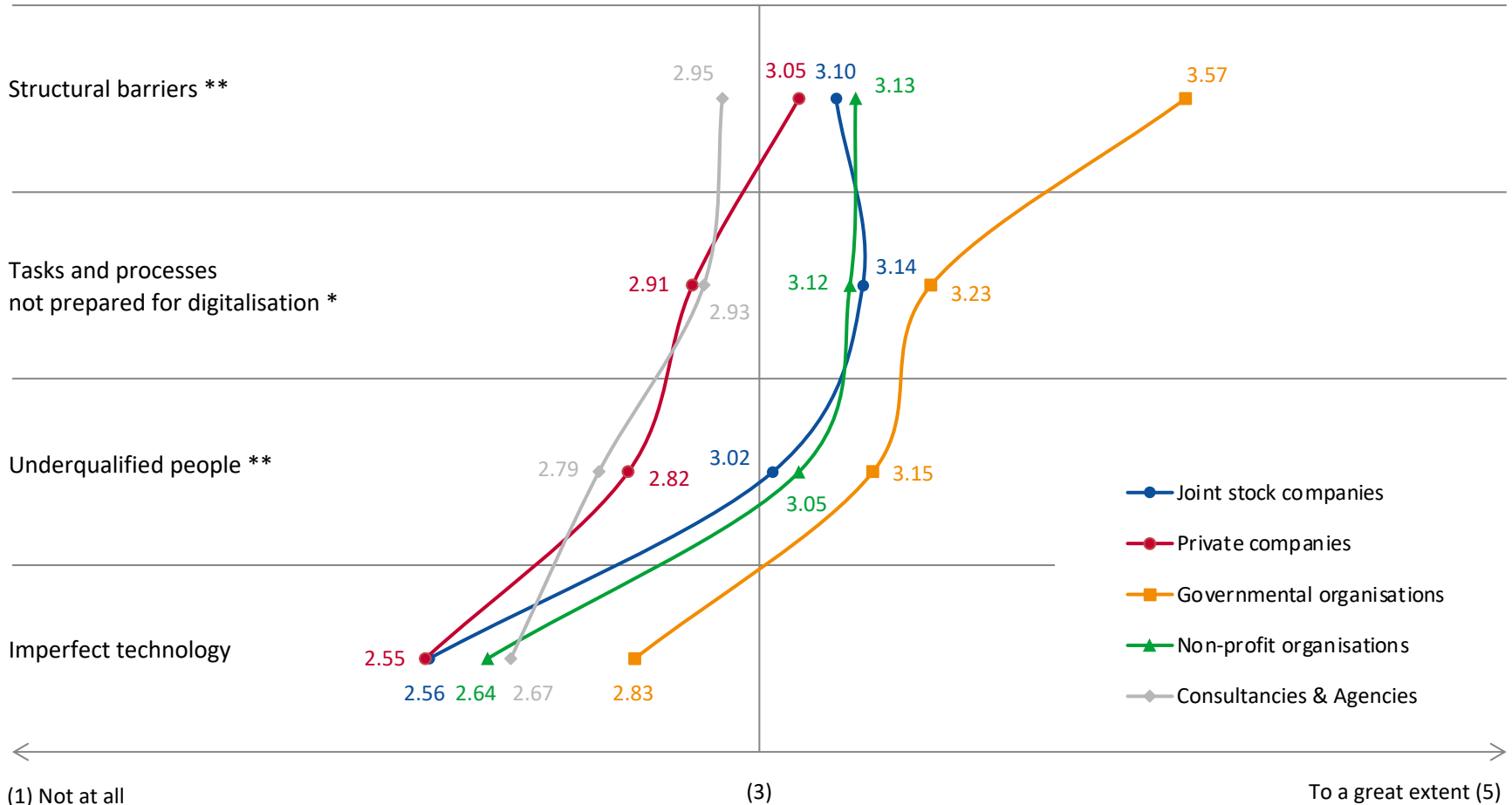
Barriers for implementing CommTech: Organisational structures and processes are more challenging than technological aspects

Challenges of introducing CommTech in communication units



Governmental organisations face higher barriers in all dimensions, while private companies and agencies are better prepared for adopting CommTech

Challenges of introducing CommTech in communication units



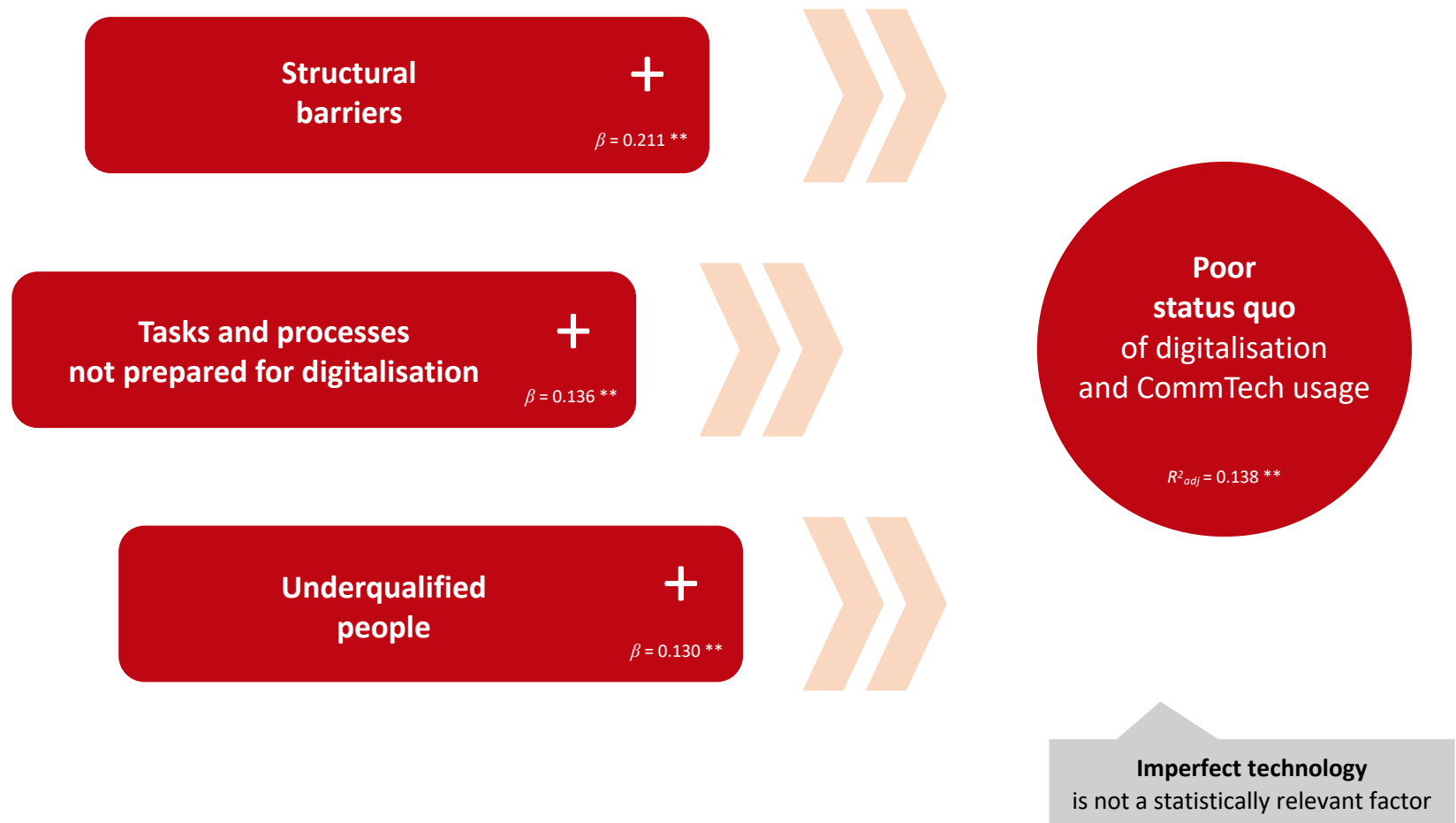
www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,412 communication professionals. Q4: What are the challenges in introducing CommTech in your organisation? Scale 1 (Not at all) – 5 (To a great extent). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01). * Significant differences (ANOVA, p ≤ 0.05).

Perceived relevance of key challenges for CommTech implementation in different European countries

Challenges of introducing CommTech in communication units

	Structural barriers	Tasks and processes not prepared for digitalisation	Under-qualified people	Imperfect technology		Structural barriers	Tasks and processes not prepared for digitalisation	Under-qualified people	Imperfect technology
Germany	49.7%	42.7%	42.0%	34.4%	Finland	52.6%	26.3%	36.8%	22.8%
Austria	50.7%	36.6%	32.4%	23.9%	Lithuania	34.5%	34.5%	17.2%	10.3%
Switzerland	44.4%	42.2%	31.1%	24.4%	Spain	41.0%	37.7%	31.1%	19.7%
France	47.8%	30.4%	47.8%	43.5%	Portugal	41.0%	43.6%	59.0%	30.8%
Belgium	42.6%	46.8%	25.5%	23.4%	Italy	40.6%	40.6%	34.4%	26.0%
Netherlands	49.2%	45.8%	47.5%	30.5%	Slovenia	54.0%	48.0%	46.0%	24.0%
United Kingdom	48.1%	40.4%	44.2%	50.0%	Croatia	29.7%	29.7%	24.3%	21.6%
Ireland	49.2%	47.7%	38.5%	26.2%	Bosnia and Herzegovina	41.0%	23.1%	33.3%	33.3%
Denmark	36.8%	39.5%	28.9%	28.9%	Turkey	45.6%	35.1%	29.8%	40.4%
Sweden	56.1%	34.8%	33.3%	27.3%	Romania	28.7%	33.0%	21.3%	28.7%
Norway	48.2%	37.5%	35.7%	17.9%	Poland	34.5%	34.5%	17.2%	20.7%

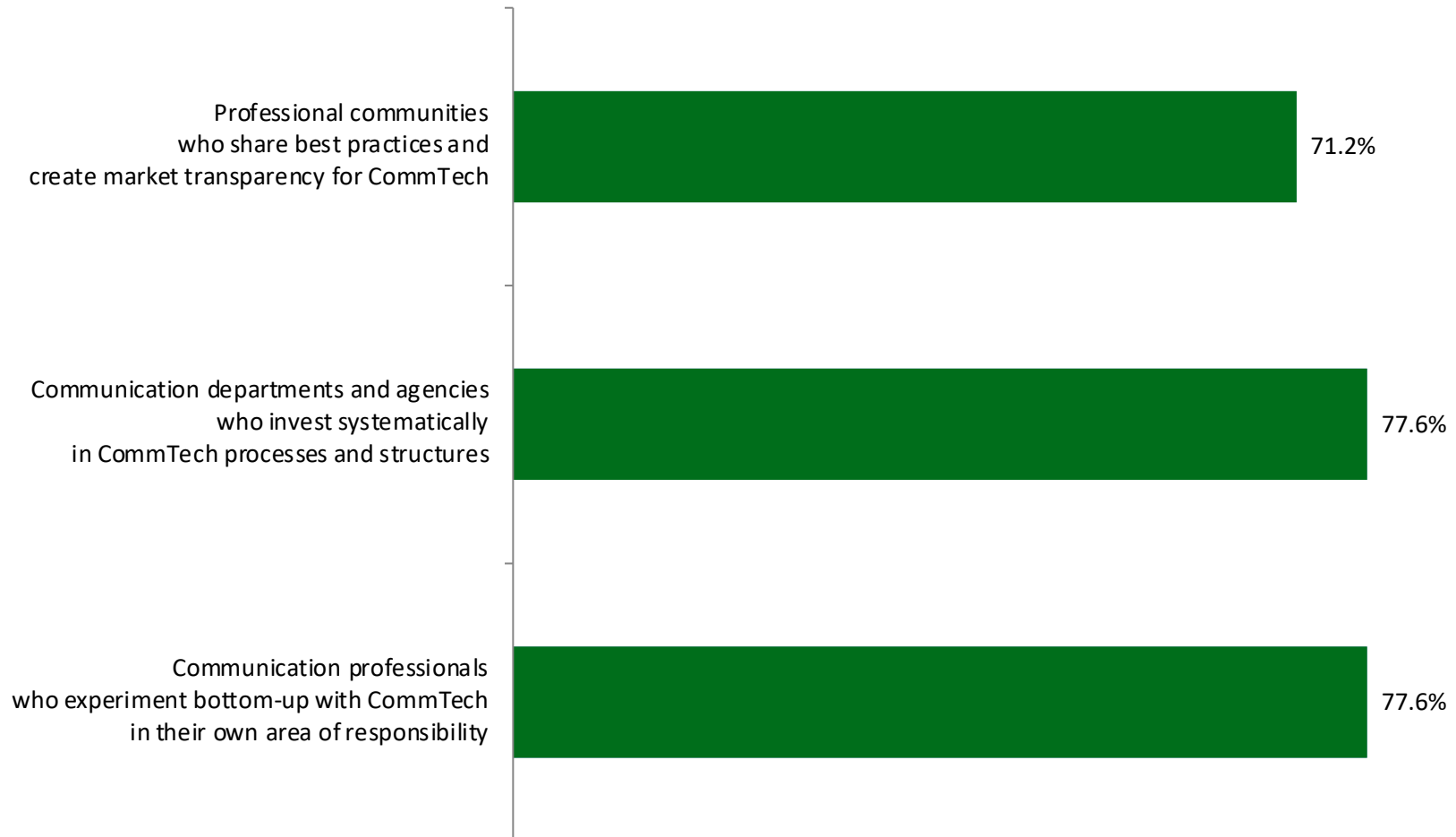
Structural barriers, inadequate tasks and processes, and underqualified staff hinder the digitalisation and CommTech adoption in communication units



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,412 communication professionals. Q3: How would you describe your department or agency in terms of digitalization and the use of CommTech; to which group does it belong? Please award 0 to 5 stars. Q4: What are the challenges in introducing CommTech in your organisation? Scale 1 (Not at all) – 5 (To a great extent). ** Model / predictor highly significant ($p \leq 0.01$).

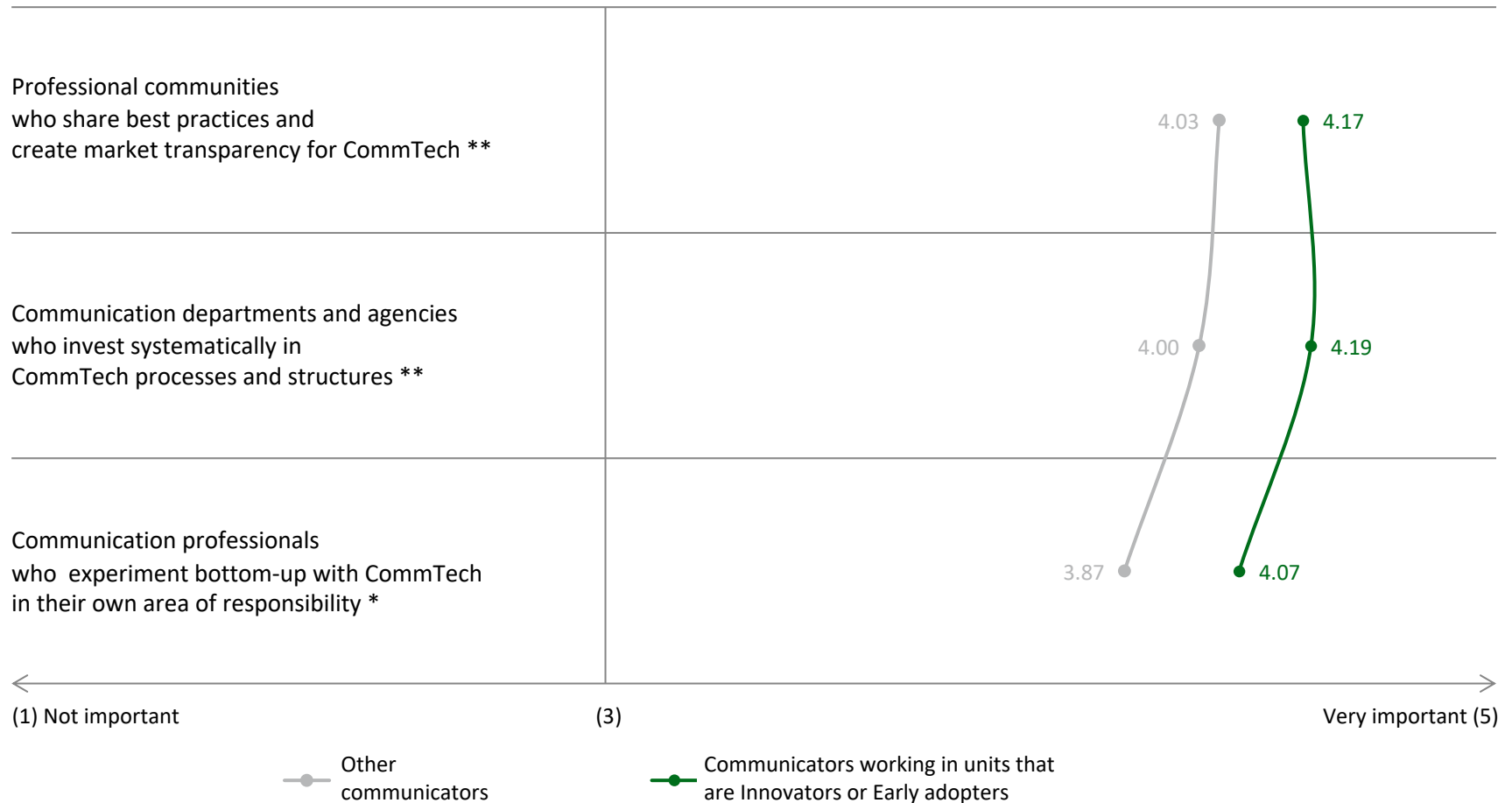
Unlocking the full potential of CommTech: Communicators think that they themselves, their organisations and the profession as a whole must take action

Importance of different actors in the field



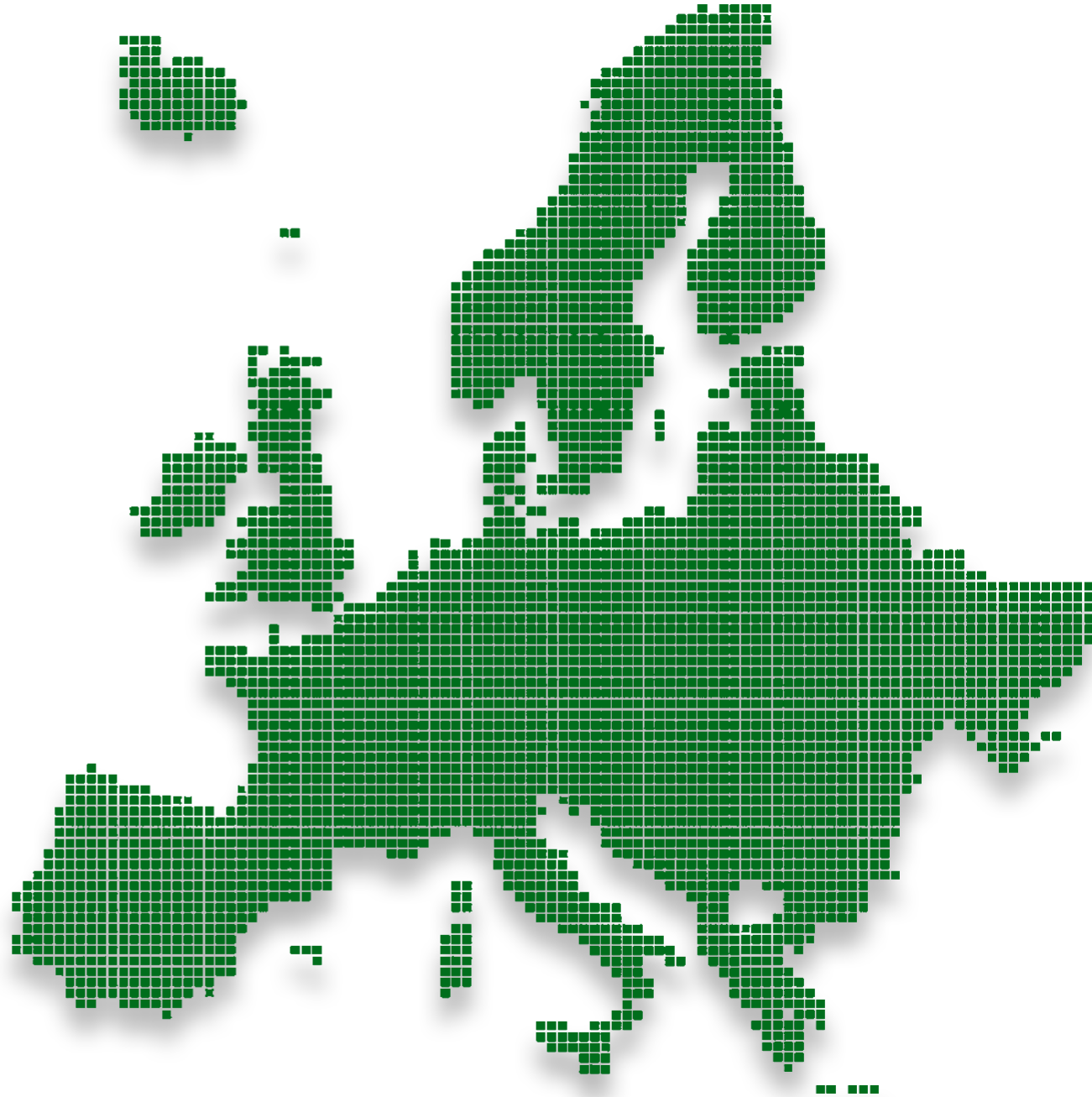
Communicators working in technologically more advanced units see even more need to support digitalisation on all levels

Importance of different actors in the field



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,412 communication professionals. Q5: In your opinion, who is important for unlocking the full potential of CommTech? Scale 1 (Not important) – 5 (Very important). Mean values. ** Highly significant differences (independent samples T-Test, $p \leq 0.01$). * Significant differences (independent samples T-Test, $p \leq 0.05$). Sample split in Innovators & Early adopters and other professionals based on Q3.

External consulting in
communications:
Complexity, quality
and trends



External consulting in communications: Complexity, quality and trends

Organisations are constantly introducing new communication activities to meet the demands of stakeholders and the changing media landscape. Many are also optimising their structures and processes for communications to improve effectiveness. These challenges are manifold and can require external support from consultants. While communication consulting is growing fast, it is rarely thoroughly studied (Frandsen et al., 2013; Hoffjann et al., 2021; Verčič et al., 2018). Consulting in communications is also an anxious and insecure industry encroached by traditional management consultancies and growing competition (Engwall & Kipping, 2013; von Platen, 2018). Our study explored current developments in this important area of professional practice.

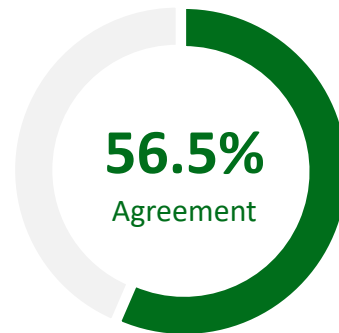
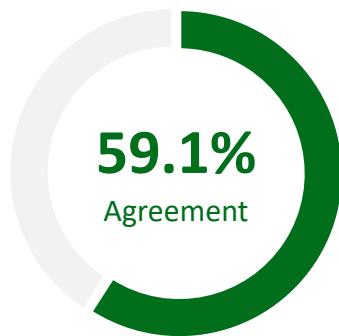
The majority of communication professionals in Europe believe that the need for external consulting (1) on stakeholder communications and (2) on structure and processes for communications in organizations are increasing (59.1% and 56.5% respectively). Yet, at the same time, 63.9% of the respondents perceive the consulting industry becoming increasingly diversified and complex and 60.1% state that securing the quality of external consulting is getting more and more difficult. This complexity and insecurity is driving initiatives for quality improvements in the profession like the CMS III standard propagated by agency associations (ICCO, 2022a).

A previous edition of the European Communication Monitor discovered how conflicting relations between consultants and clients can be and how differently both sides see reasons for dissatisfaction or even failure (Zerfass et al., 2015). Clients as well as consultants need specific competencies to be able to productively work together and produce quality results (Ennsfellner et al., 2014). The consulting process can be modelled as an underlying client-consultant relationship upon which advice is generated in several steps (Zerfass et al., 2022b): the input phase covers prerequisites like available structures and people; the throughput phase includes the realisation of consulting; while the output and outcome phase materialises (or not) in direct and long-term results (Donabedian, 1980; McLeod & Schapper, 2020). Such models have been developed originally for medical services and have since been adopted in many disciplines, including communications (Bentele & Nothhaft, 2004). It is interesting to note that our respondents see the major sources of conflicts experienced by clients and consultants in the input phase (weak governance, leadership, or internal processes, 50.2%; lack of competent people and know-how; 44.1%) and throughput (poor project coordination; 46.4%).

When asked about what is the most important dimension to secure the quality of consulting processes, our respondents put people and know-how of clients and consultants at the top spot (89.9% mentioning this as important or very important), followed by project coordination between both sides in the second place (87.7%). A strong majority of communication professionals in Europe support the idea of quality standards for communication consulting: 67.8% agree with the statement that the profession needs overarching standards for consultants to assess and secure the quality of consulting in communications and 60.7% agree that the profession needs also standards for clients; while a quarter of the respondents see no need for such controls. There is stronger support for quality standards of all kinds among consultancies/agencies (76.0%) and companies (74.2%) than there is among governmental organisations (71.9%) and non-profits (67.4%). There are also significant differences across Europe, with 87.8% of respondents from Portugal supporting quality standards for consultants and/or clients as one extreme and 65% of respondents from Denmark rejecting them on the other side.

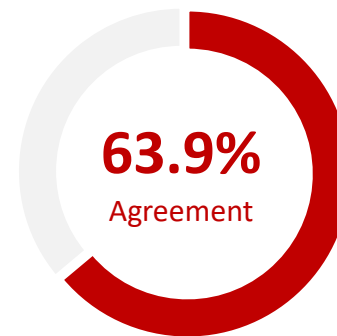
External consulting in communications is getting more relevant, diverse and complex, while ensuring quality is increasingly difficult

The need for external consulting on stakeholder communications is increasing

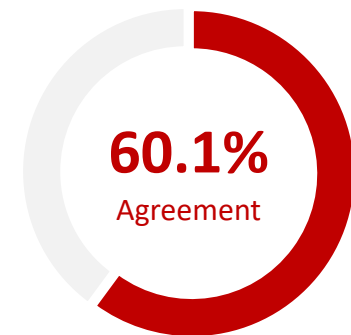


The need for external consulting on structures and processes for communications in organisations is increasing

The consulting industry is becoming increasingly diversified and complex



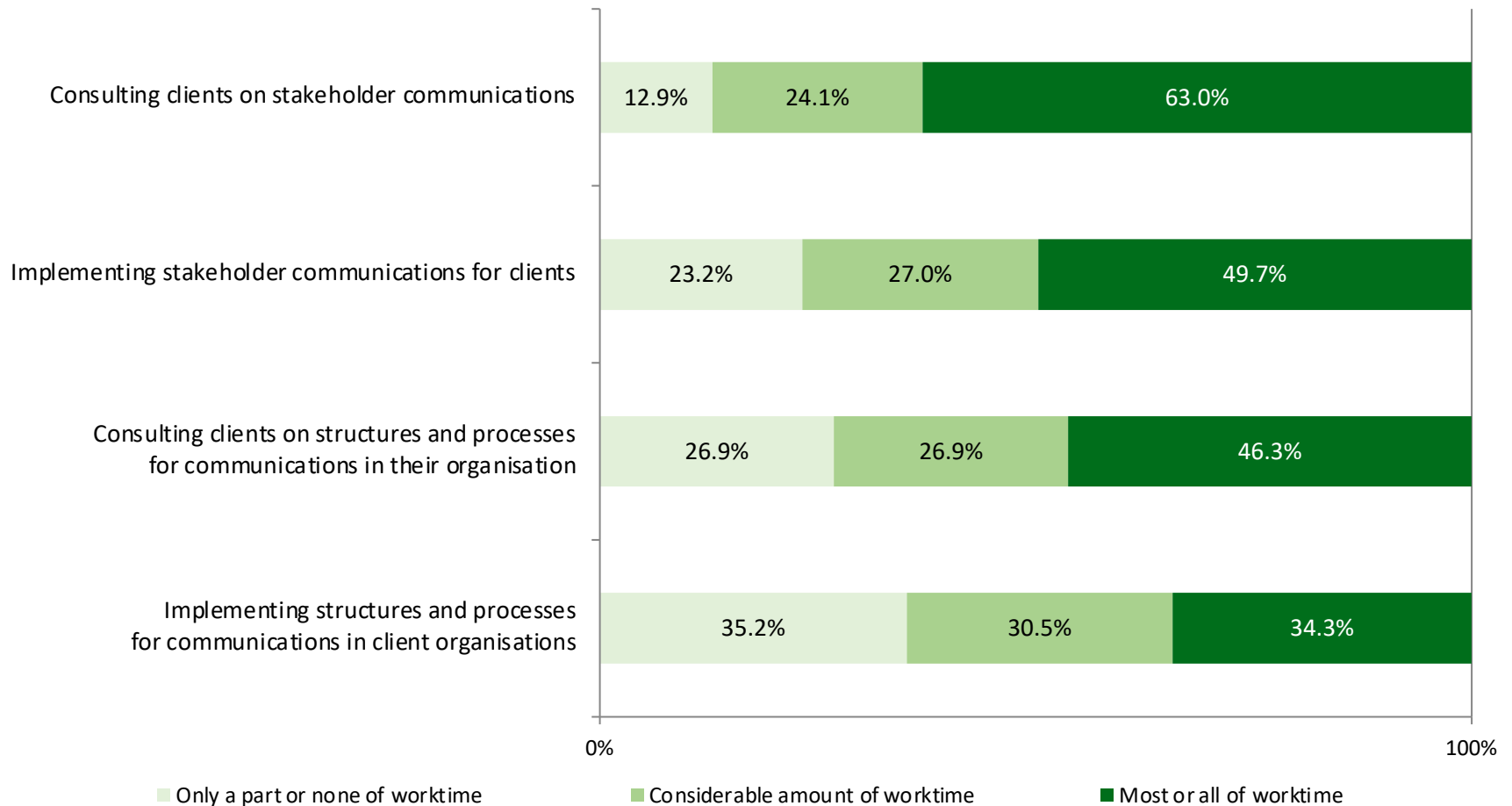
Securing the quality of external consulting gets more and more difficult



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,558 communication professionals. Q 6: Organisations are constantly introducing new communication activities to meet the demands of stakeholders and the changing media landscape. Many are also optimizing their structures and processes for communications to improve effectiveness. These challenges are manifold and can require external support from consultants. How do you assess the current situation of external consulting in communications? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequencies based on scale points 4-5.

Consultancies and agencies are characterised by a close combination of consulting and implementation as well as between central fields of action

Typical activities of communication practitioners working in consultancies and agencies

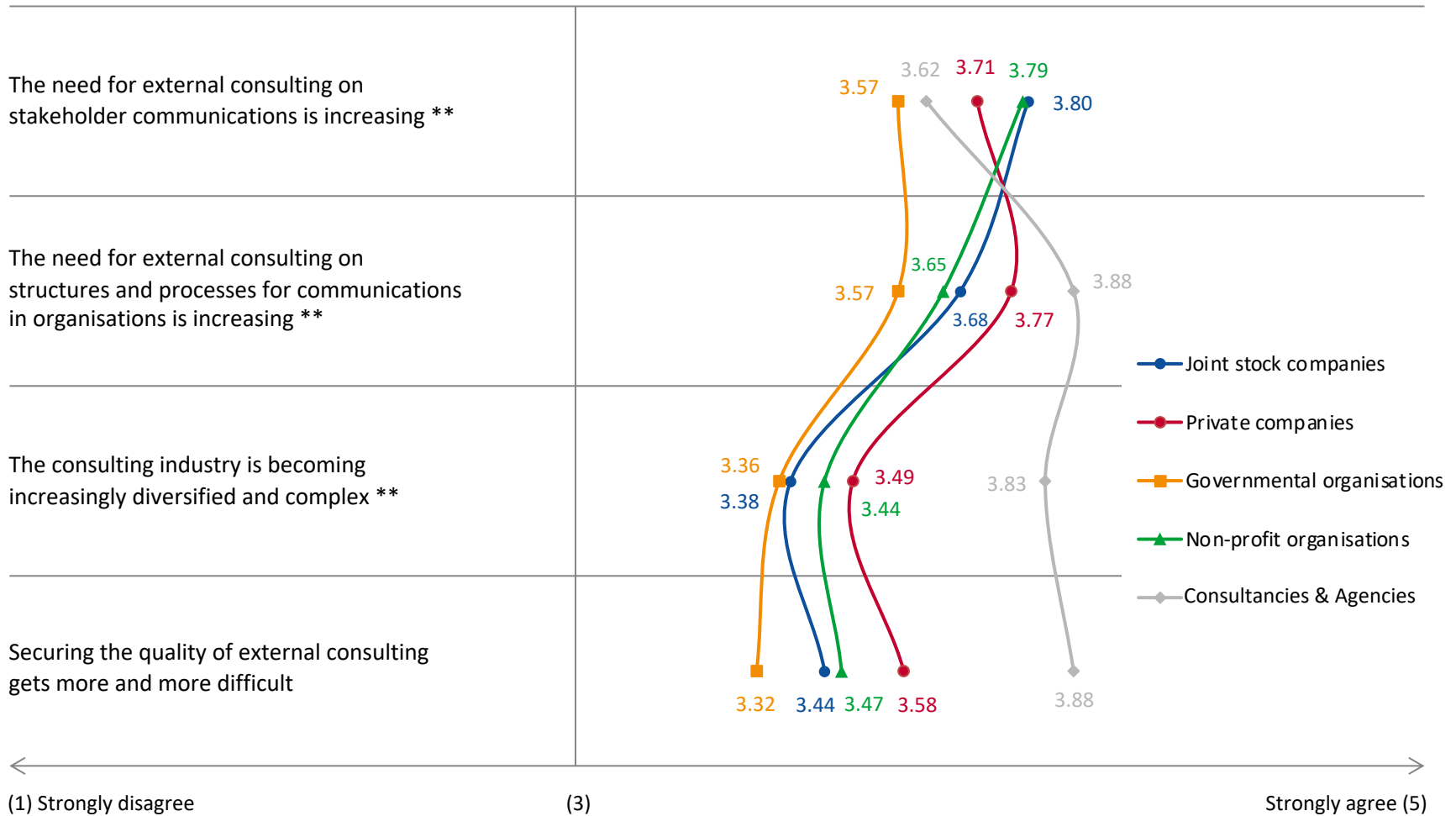


www.communicationmonitor.eu / Zerfass et al. 2022 / n = 551 communication professionals working in consultancies and agencies. Q 27: Please consider your own activities in a typical week: How much of your worktime is usually devoted to these tasks? Scale 1 (None of my worktime) – 5 (All of my worktime).

Diverging perspectives on external consulting in communications across Europe

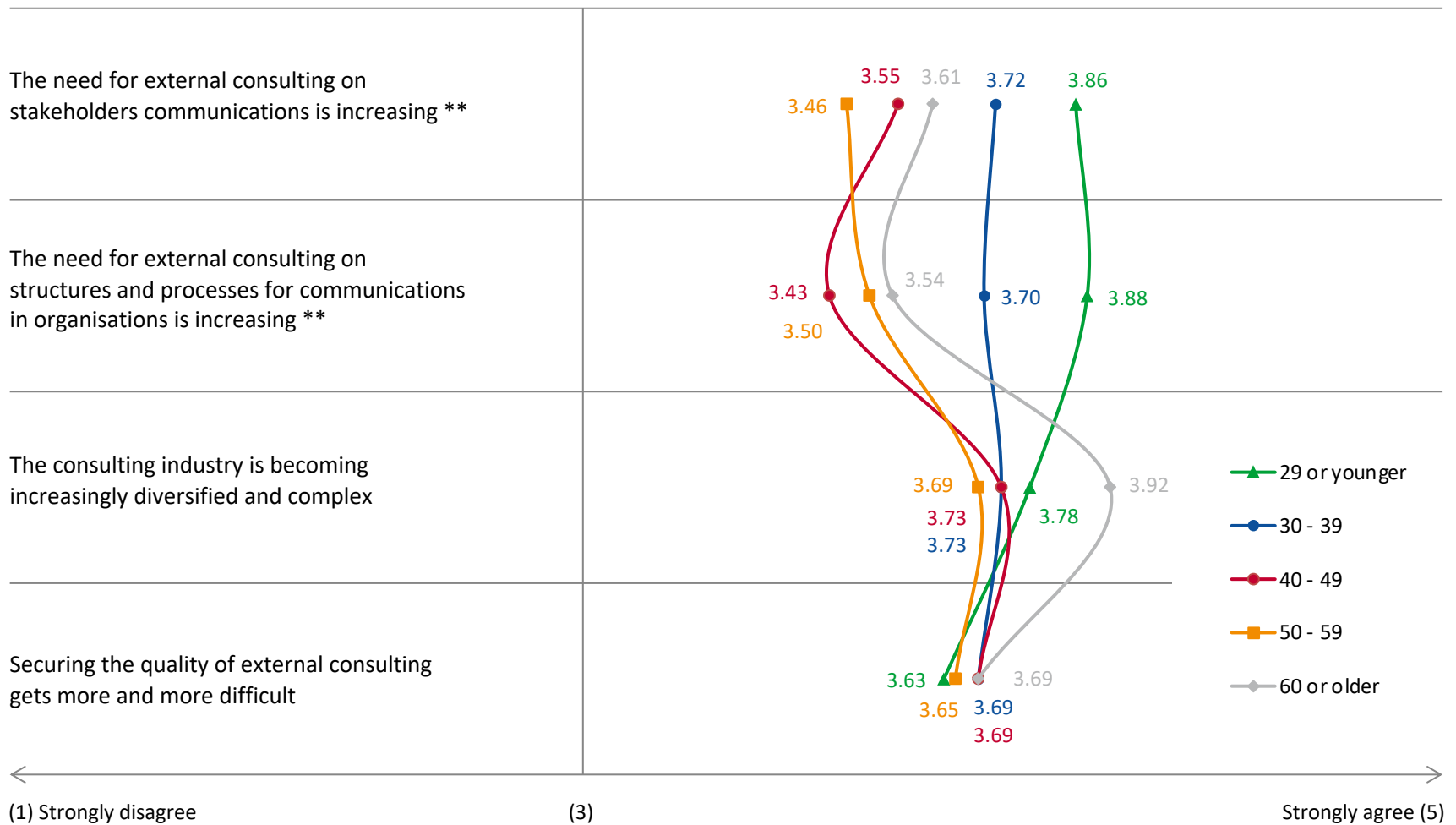
	Need for consulting on stakeholder communications is increasing	Need for consulting on structures and processes is increasing	Consulting industry is becoming increasingly diversified and complex	Securing quality of external consulting gets more and more difficult		Need for consulting on stakeholder communications is increasing	Need for consulting on structures and processes is increasing	Consulting industry is becoming increasingly diversified and complex	Securing quality of external consulting gets more and more difficult
Germany	55.4%	60.2%	65.7%	62.0%	Finland	46.2%	30.8%	47.7%	52.3%
Austria	53.8%	52.6%	66.7%	52.6%	Lithuania	62.1%	65.5%	55.2%	44.8%
Switzerland	46.8%	42.6%	74.5%	63.8%	Spain	72.3%	58.5%	64.6%	49.2%
France	54.5%	63.6%	77.3%	72.7%	Portugal	67.3%	77.6%	69.4%	59.2%
Belgium	69.2%	59.6%	61.5%	63.5%	Italy	64.0%	57.9%	67.5%	68.4%
Netherlands	54.4%	54.4%	45.6%	59.6%	Slovenia	63.0%	55.6%	61.1%	61.1%
United Kingdom	62.1%	53.4%	63.8%	60.3%	Croatia	60.5%	60.5%	76.7%	60.5%
Ireland	80.0%	66.7%	69.3%	62.7%	Bosnia and Herzegovina	60.4%	60.4%	66.7%	68.8%
Denmark	42.5%	37.5%	55.0%	62.5%	Turkey	70.8%	73.8%	63.1%	61.5%
Sweden	36.9%	43.1%	49.2%	55.4%	Romania	65.5%	59.3%	73.5%	61.1%
Norway	29.2%	36.9%	60.0%	49.2%	Poland	67.6%	64.7%	70.6%	50.0%

Common assessment of the need for consulting by in-house communicators and external providers, but quite different perspectives on market developments



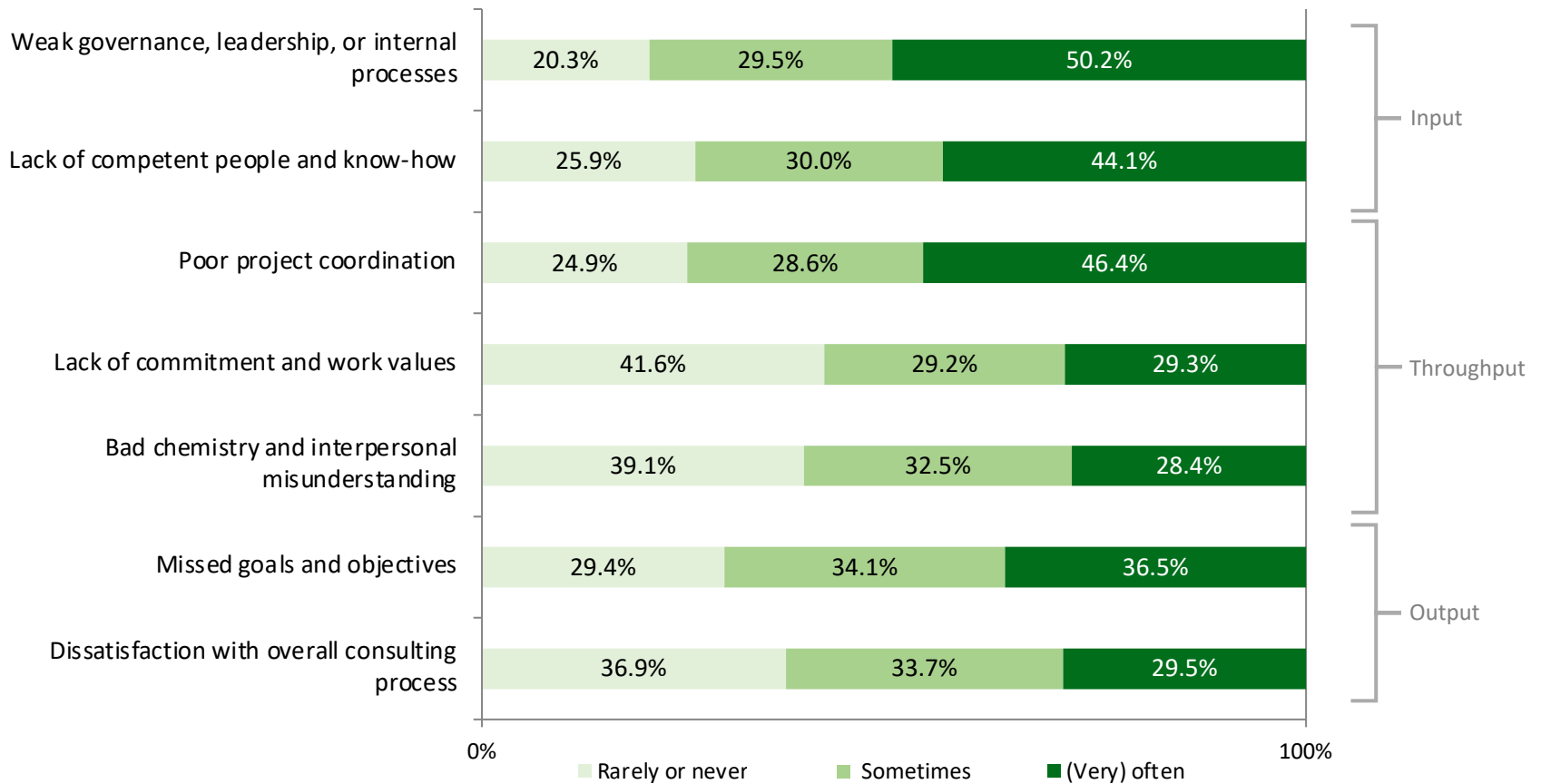
www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,558 communication professionals. Q 6: How do you assess the current situation of external consulting in communications? Scale 1 (Strongly disagree) – 5 (Strongly agree). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01).

Younger communicators predict an increasing need for consulting more often; the quality issue is equally relevant in all age groups



Conflicts in consulting processes have manifold reasons and occur in different phases – weak governance and leadership is a bad starting point

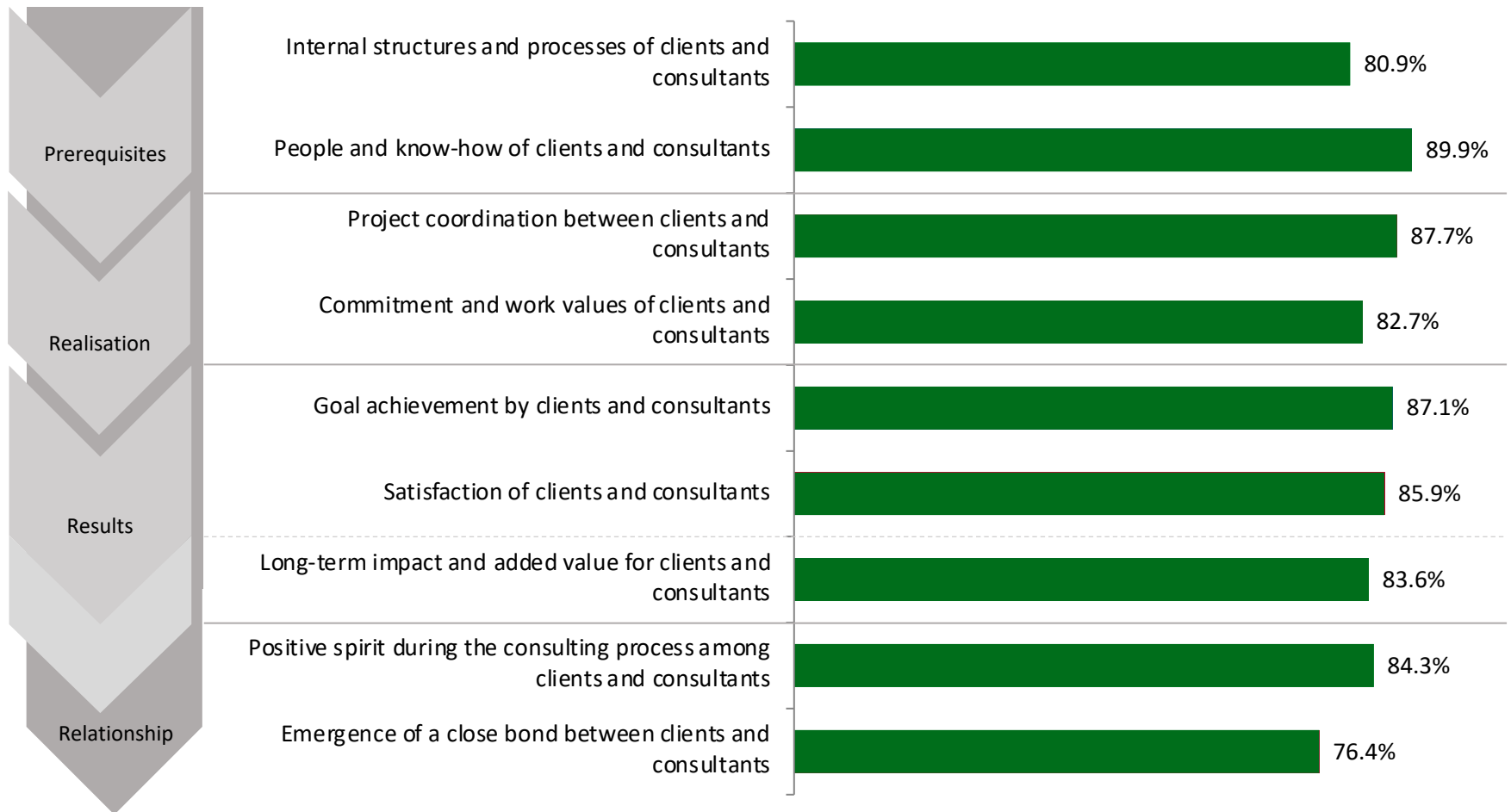
Sources of conflicts experienced by clients and consultants



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,487 communication professionals. Q8: Consulting does not always run smoothly – conflicts between consultants and clients may arise at different stages and decrease the overall quality of consulting. Based on your own professional experience as a client or consultant: How often have you been confronted with the following sources of conflict? Scale 1 (Never) – 5 (Very often).

Quality in communication consulting: A multidimensional construct

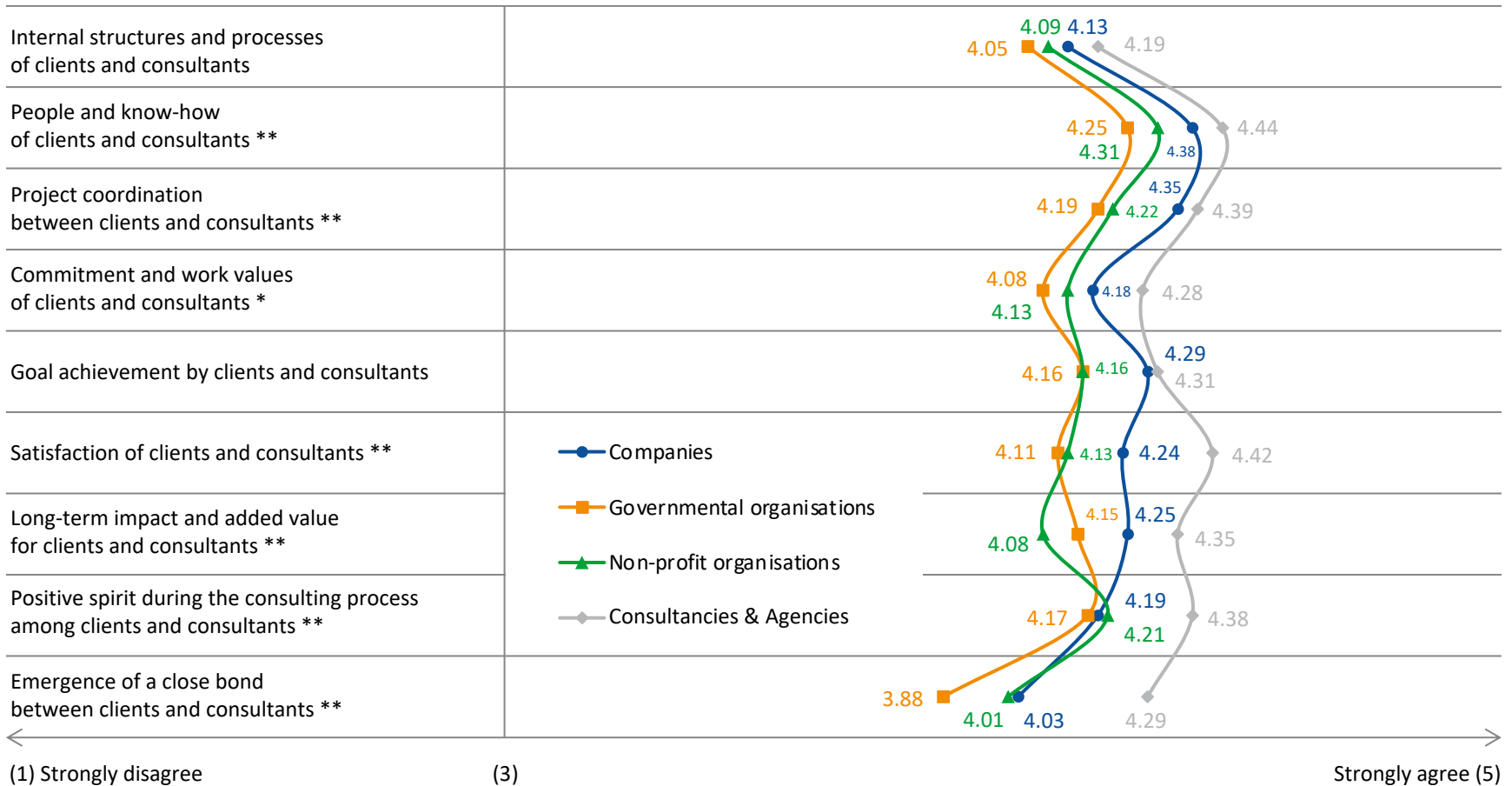
Importance of various factors to secure the quality of consulting processes



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,558 communication professionals. Q 7: Communication consulting can be defined as the process by which consultants help or enable organisations to solve challenges related to their communication activities and/or their structures and processes for communications. What is, in your opinion, important to secure the quality of such consulting processes? Scale 1 (Not important) – 5 (Very important). Frequencies based on scale points 4-5.

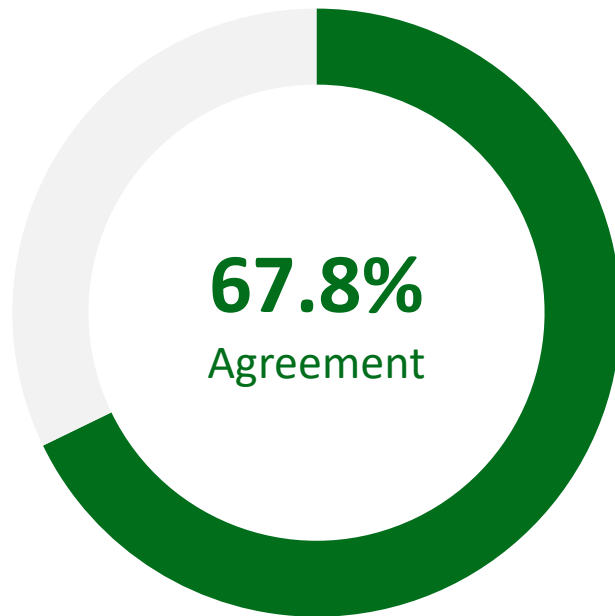
Communication consultancies and agencies assess all dimensions of consulting quality higher than their clients working in other organisations

Importance of various factors to secure the quality of consulting processes

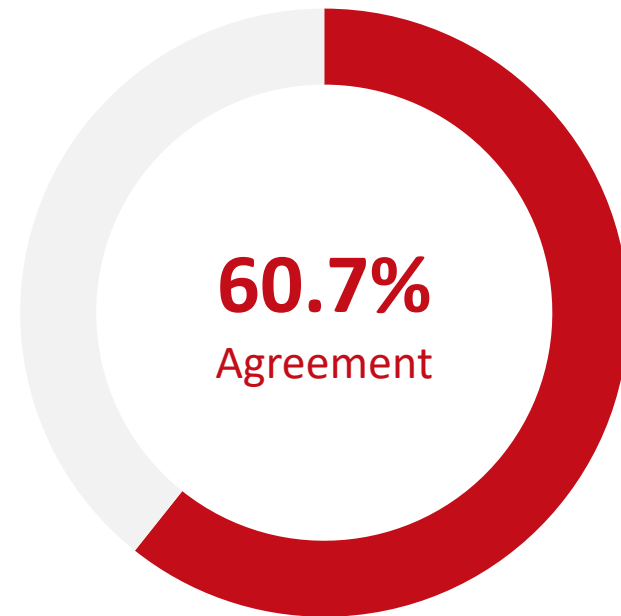


www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,558 communication professionals. Q 7: What is, in your opinion, important to secure the quality of such consulting processes? Scale 1 (Not important) – 5 (Very important). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01). * Significant differences (ANOVA, p ≤ 0.05).

Quality standards for consulting in communications:
A clear majority of practitioners in Europe support the approach

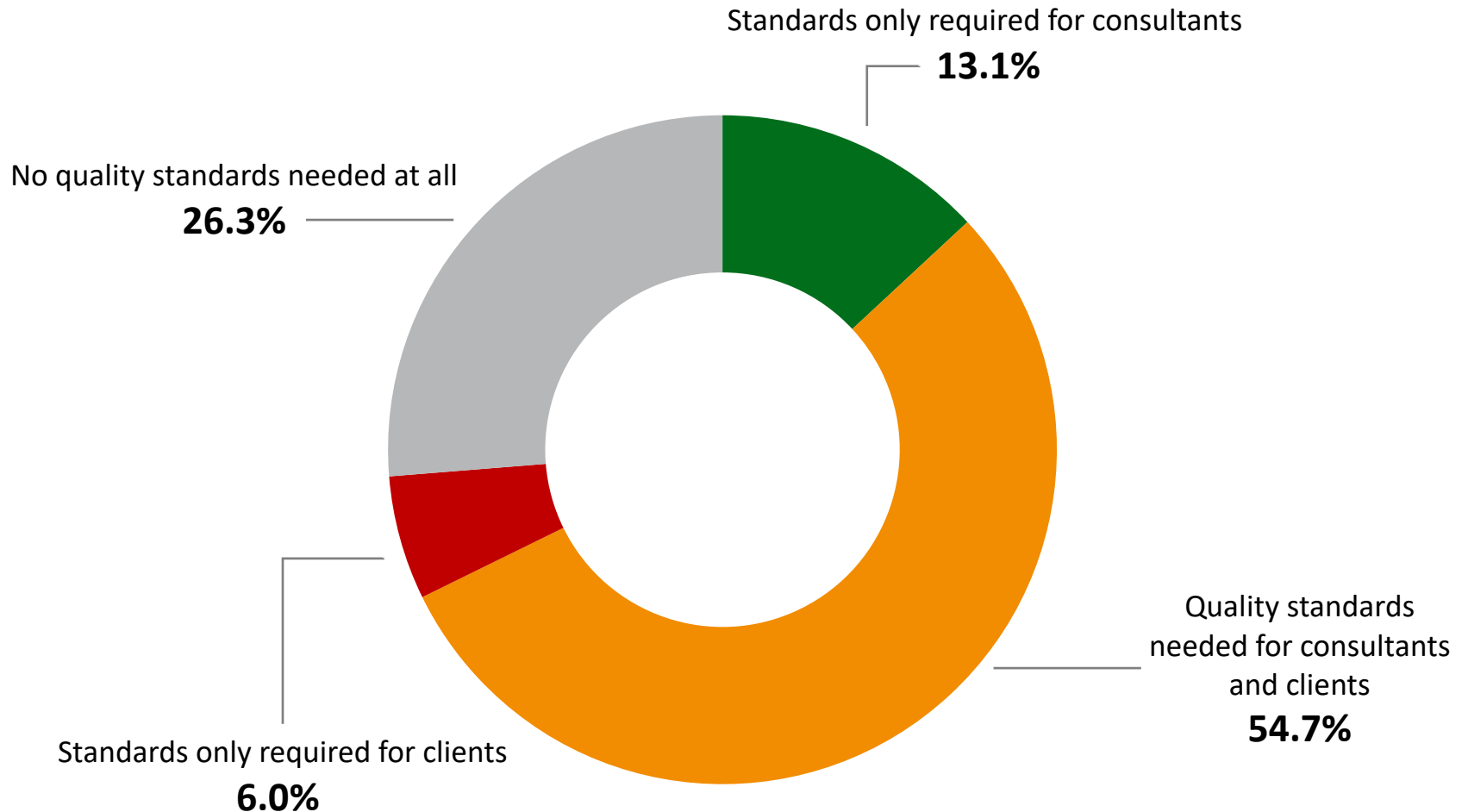


The profession needs overarching **standards for consultants** to assess and secure the quality of consulting in communications

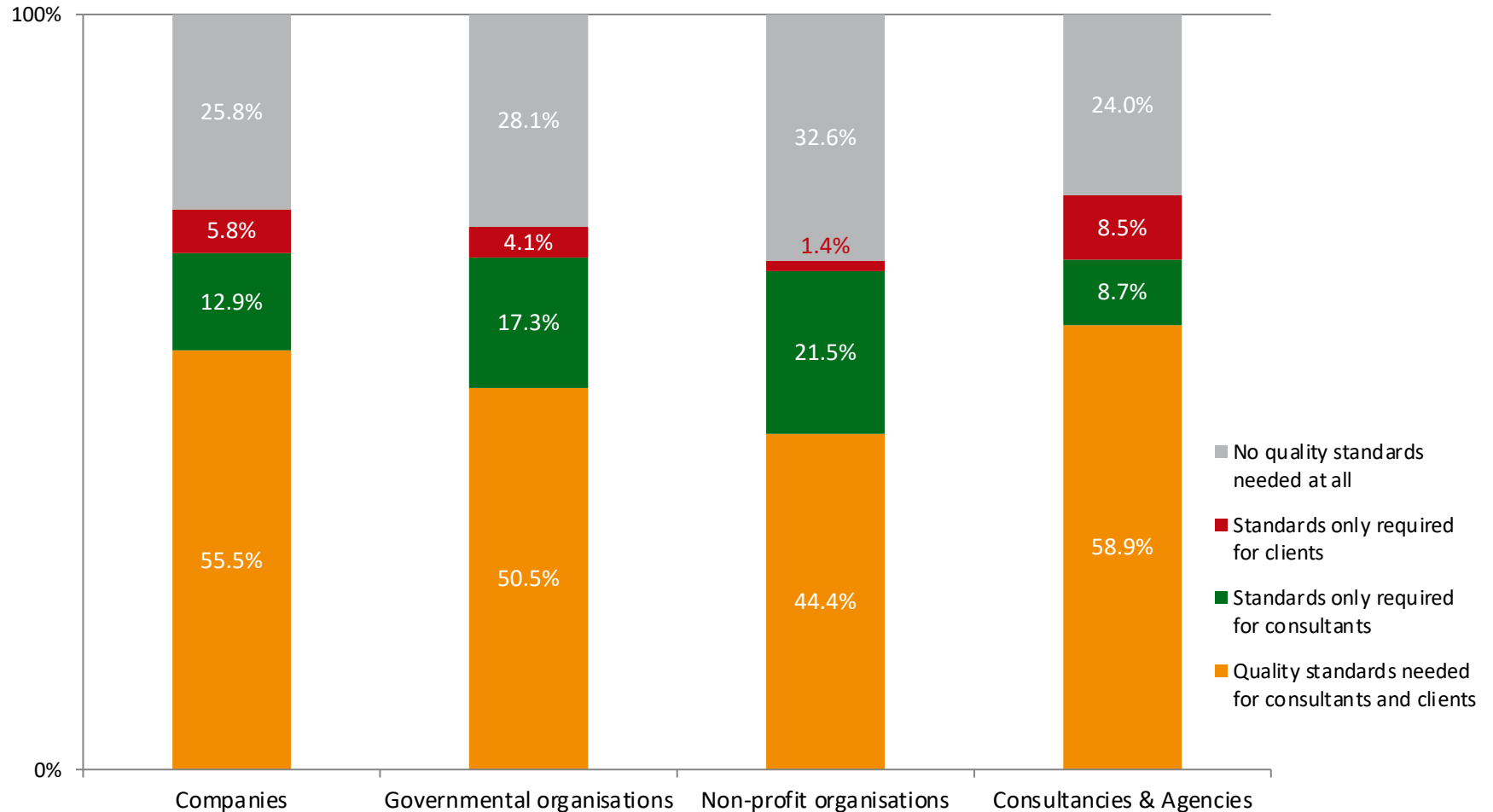


The profession needs overarching **standards for clients** to assess and secure the quality of consulting in communications

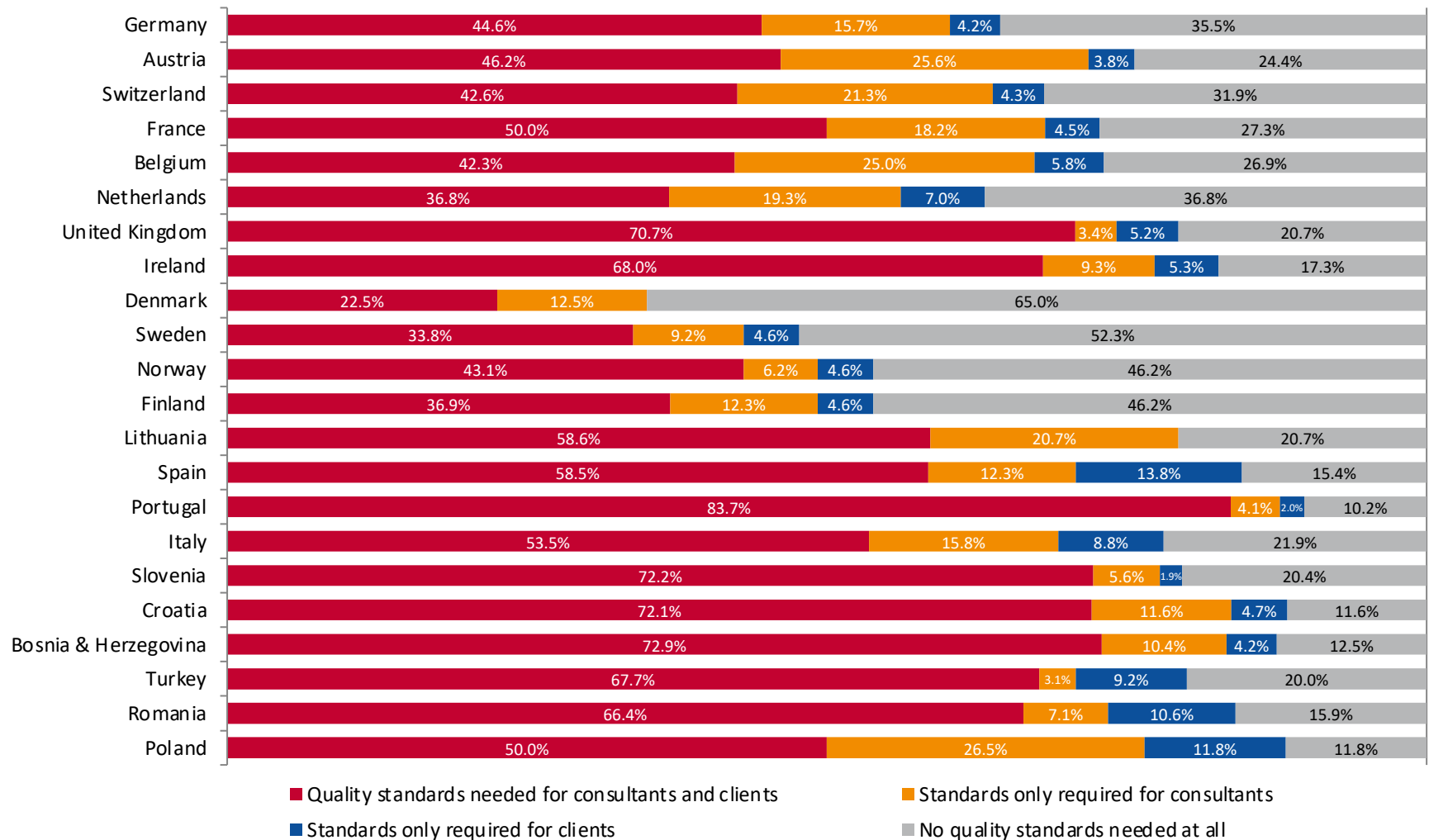
Most communicators would like to see quality standards for both consultants and clients, but a quarter think that none of these standards are necessary



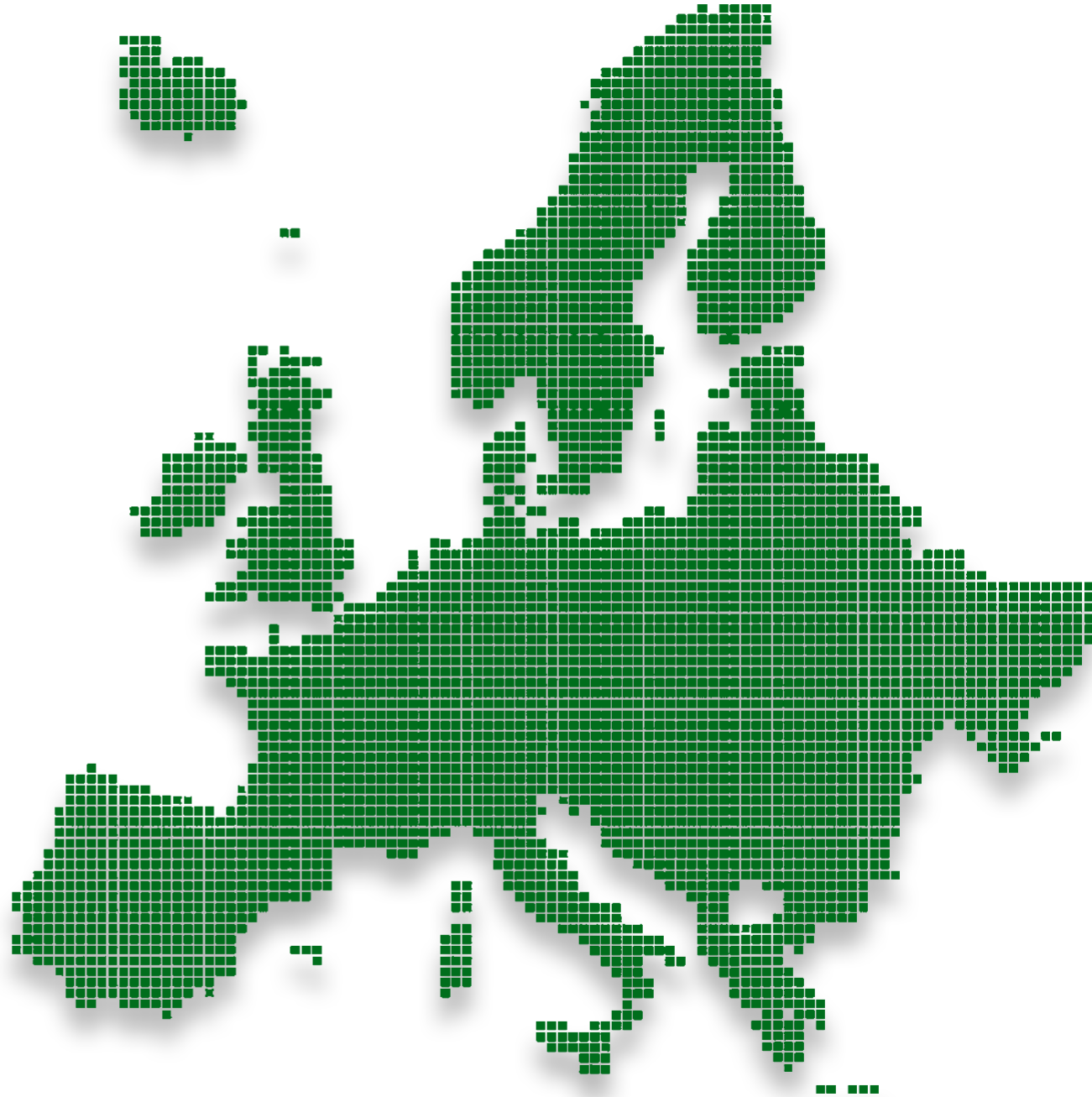
Stronger plea for quality standards by consultancies and agencies; non-profits are least convinced and rarely see the need to appeal to clients



Quite different assessments of quality standards in communication consulting across Europe



Strategic issues
and work practices
in the profession



Strategic issues and work practices in the profession

Since 2007 we have been annually tracking key issues for the future of the communications profession across companies, governmental organisations, non-profit organisations as well as in consultancies and agencies (Zerfass et al., 2007, 2021). This allows us to observe trends in the trajectory of different issues over time and conduct nuanced analyses distinguishing between trends in different types of organisations.

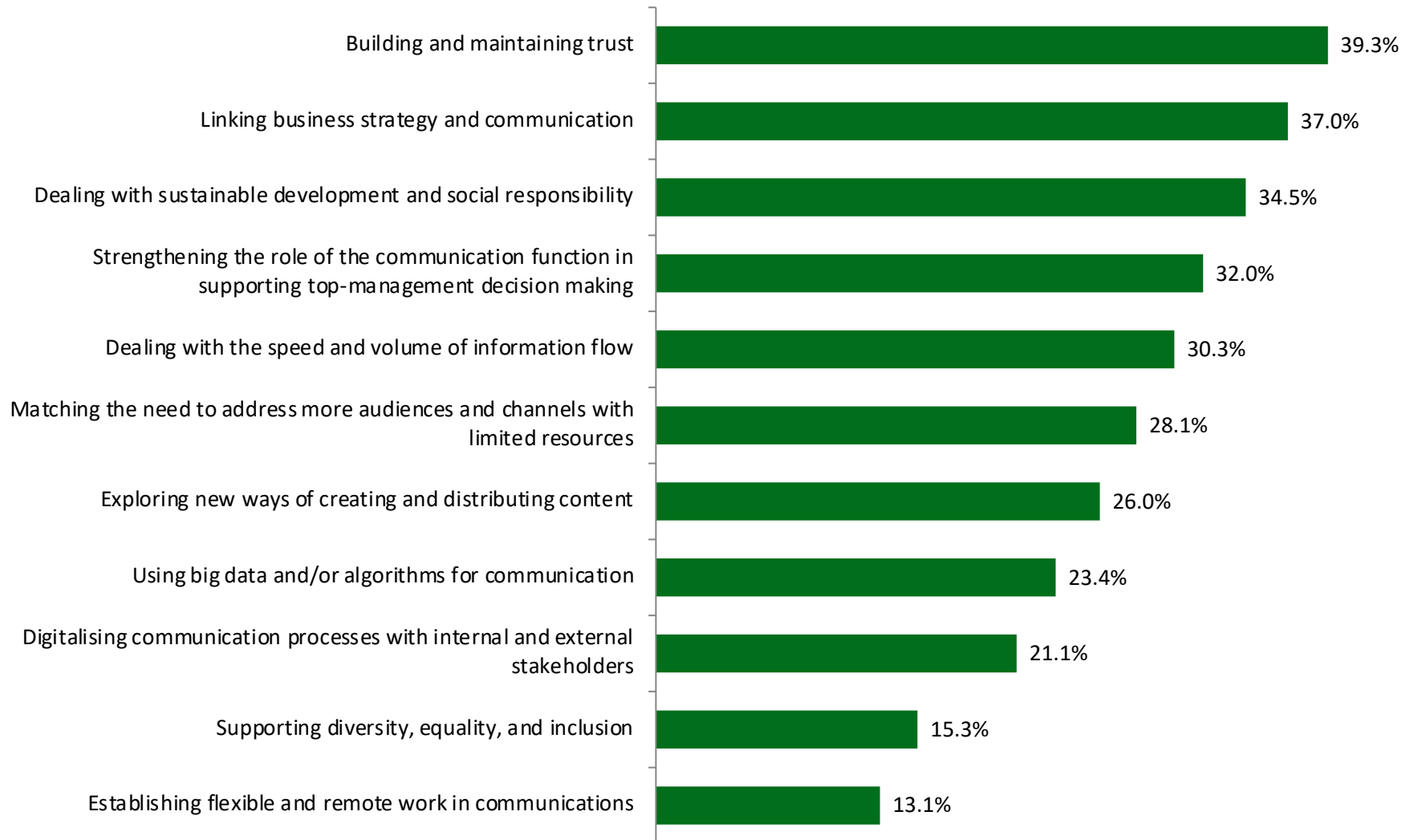
In 2022, supported by 39.3% of the respondents, building and maintaining trust is still the top issue among communication professionals in Europe – for the fifth consecutive year. Hence, we can expect trust to keep dominating the professional agenda at least until 2025. However, this importance plays out differently across organisational types. Gaining trust is perceived as most important in governmental organisations (44.7%) as well as in consultancies and agencies (40.7%). It is seen as least important in the context of non-profits (32.5%) – where five other issues on the list rank higher than this one. This comparatively low relevance of the otherwise ‘top issue’ of trust mirrors recent longitudinal research based on the Edelman Trust Barometer (Edelman, 2022) that shows an increase in global trust in the nonprofit sector, effectively rebutting any assumption of a global crisis of trust extending into the nonprofit sector (Chapman et al., 2021).

Ranked second is linking communication with business strategy (37.0%). This topic, after dominating the strategic debate for a whole decade since the inception of the ECM studies in 2007, started a noticeable decline to the bottom of the list between 2016 and 2019. It has regained its position as a top strategic issue over the past three years – especially in corporations (38.8%) as well as for consultancies and agencies (39.4%). As forecasted in last year's report (Zerfass et al., 2021a), the economic turbulences related to the pandemic have indeed seemingly perpetuated this trend, as evidenced in a 7-point jump from last year – the steepest incline among all strategic issues between 2021 and 2022.

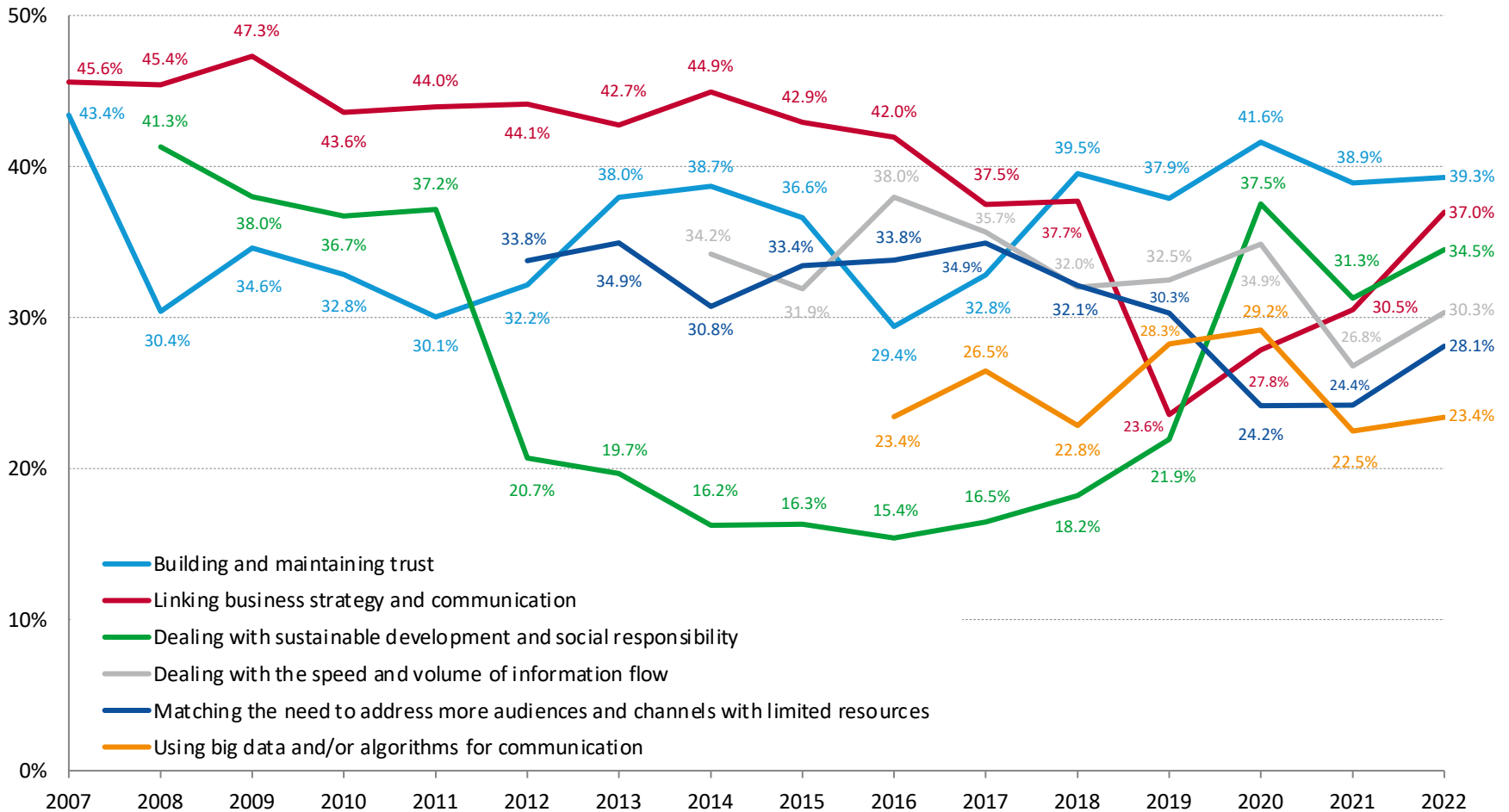
Another strong trend over recent years has been sustainable development and social responsibility, now ranked third (34.5%). While dropping three points compared to last year's report, the issue has shown a steady overall upward trend since the introduction of the United Nations' sustainable development goals (SDGs) in 2015 and now, in 2022, is in fact the most important issue for the corporate sector (39.5%). This is in line with research that shows that corporate communications now tends to invoke the SDGs in relation to core business activity (El Alfy et al., 2020). Still among the top 10 issues, but lower on the list across all organisations, are digital trends, such as using data and/or algorithms for communication (23.4%) and digitalising communication with stakeholders (21.1%).

These strategic issues relate closely to another key theme in this study: remote work practices in communication departments and agencies. Catharised by the pandemic, flexible and remote work as well as real-time collaboration are now well established in the profession. This has increased the use of digital tools like video-conferencing during the typical workdays of practitioners (see also Zerfass et al., 2021a) – now used always or often by a strong majority of communicators (80.7%). However, the profile of digital and remote work practices differs significantly across Europe with, for example, stronger tendencies for remote work and videoconferencing in Northern Europe compared with a stronger emphasis on using instant messaging for work among communicators in Southern European countries.

Most important strategic issues for communication management until 2025: Contribution to trust, sustainability and strategic goals/decisions have top priority

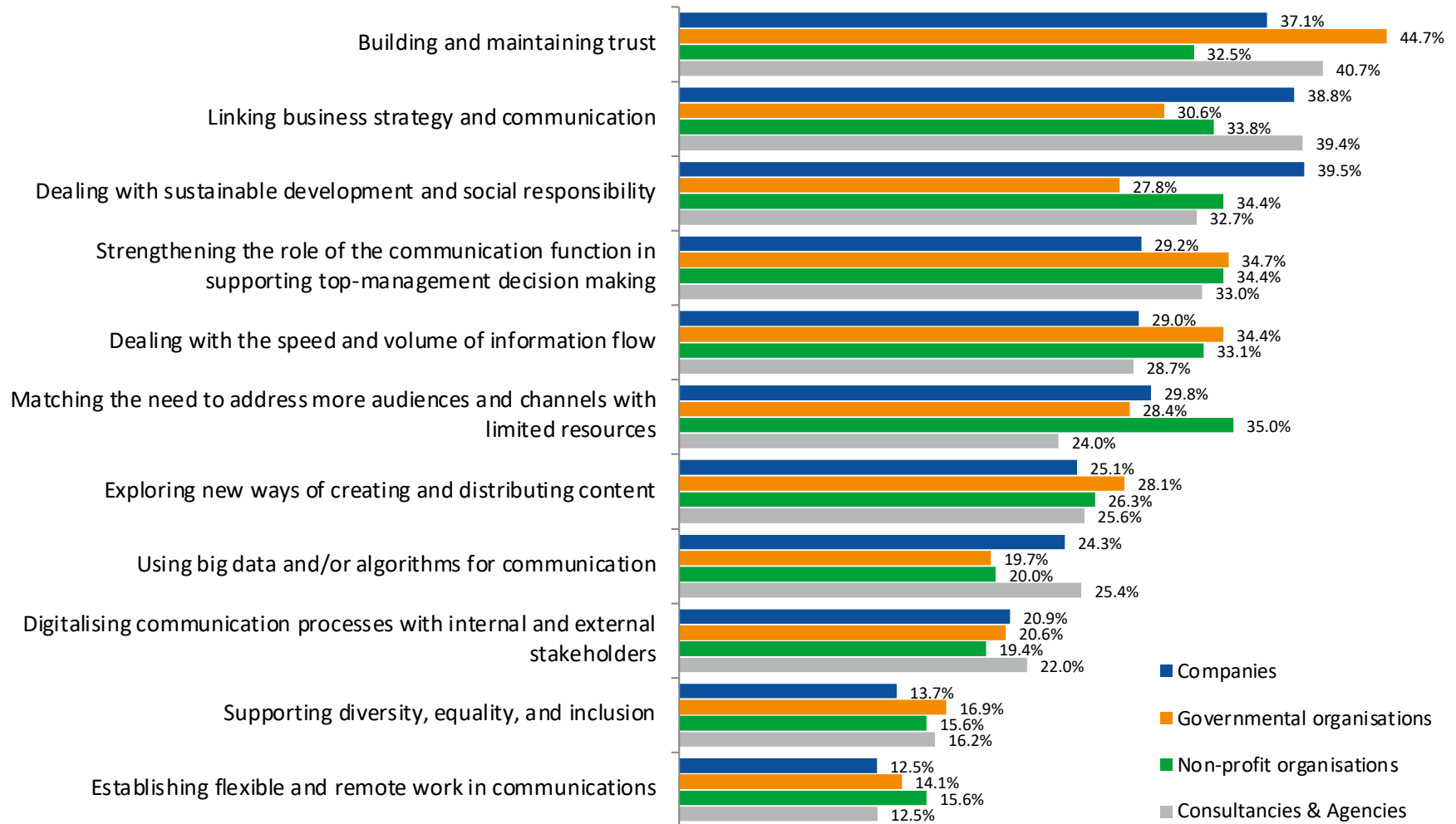


Long-term development of strategic issues for communication management



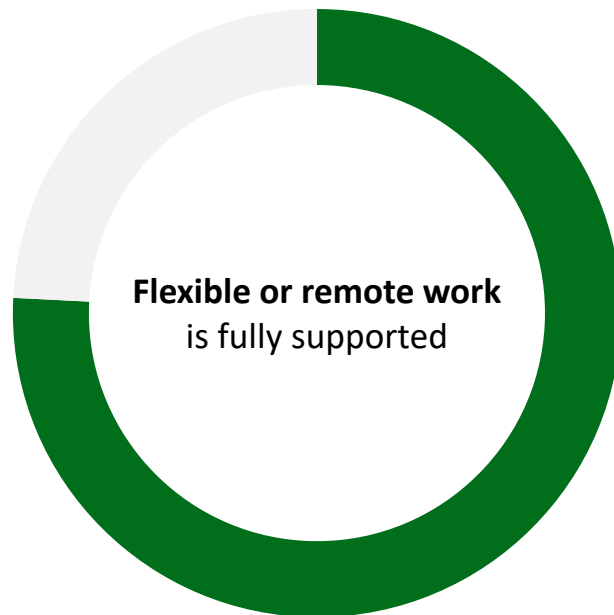
www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,672 communication professionals (Q 19); Zerfass et al. 2021a / n = 2,664 (Q 14); Zerfass et al. 2020 / n = 2,324 (Q 12); Zerfass et al. 2019 / n = 2,689 (Q 8); Zerfass et al. 2018 / n = 3,096 (Q 6); Zerfass et al. 2017 / n = 3,387 (Q 5); Zerfass 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.

Relevance of strategic issues differs between types of organisations: Companies are focused on strategic alignment; non-profits fear limited resources



Current work practices in communications: Flexible approaches are well established, but not all departments and agencies are able to collaborate online and in real time

75.8%
Agreement



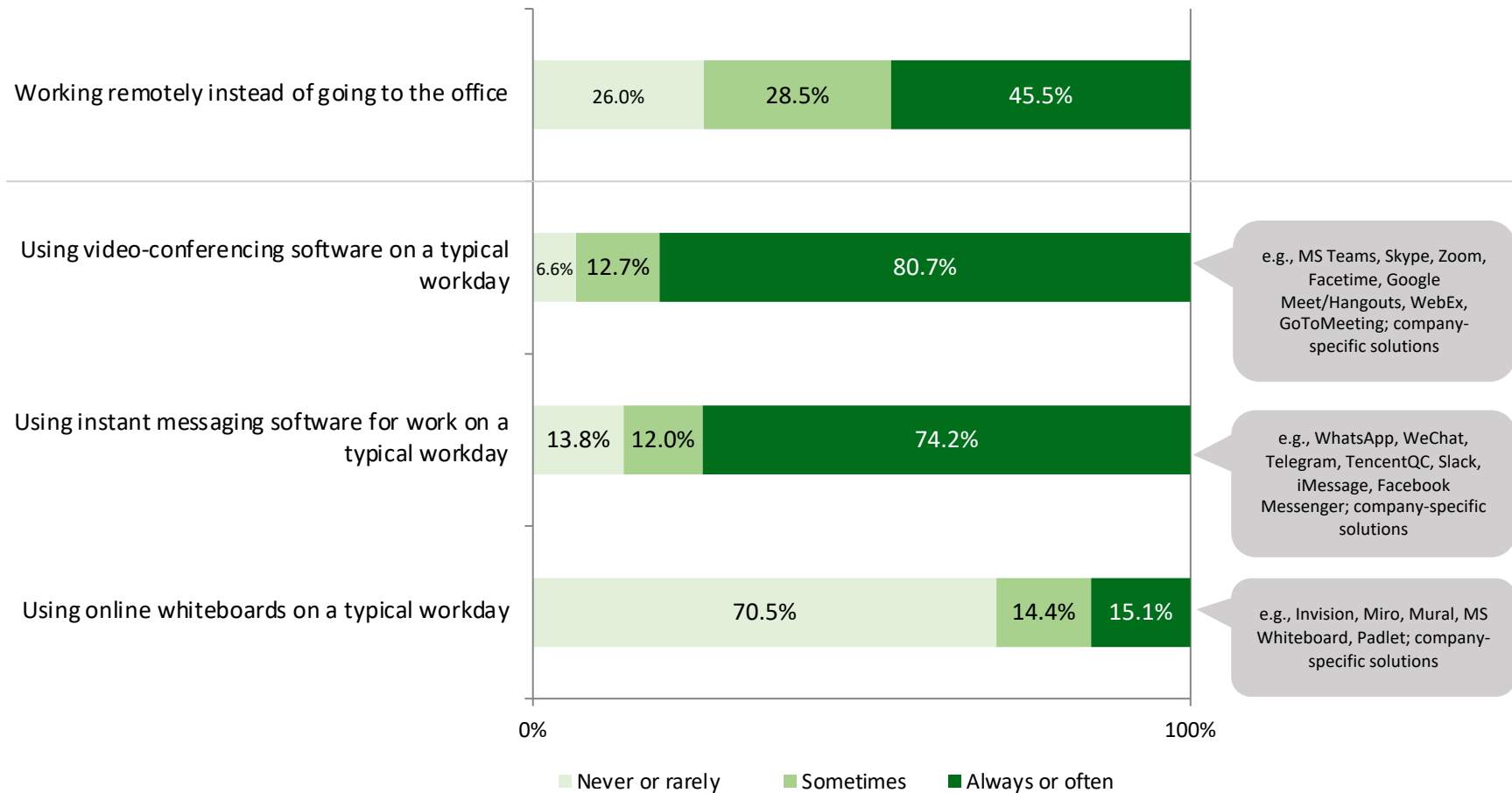
71.8%
Agreement



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,672 communication professionals. Q 17: Many communication departments and agencies now encourage flexible work (either in the office or from another place) or remote work (e.g., from home). This has increased the use of real-time collaboration tools like video conferencing or instant messaging for team interaction and for connecting with internal and external stakeholders. How would you describe the overall situation in your communication department or agency? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequencies based on scale points 4-5.

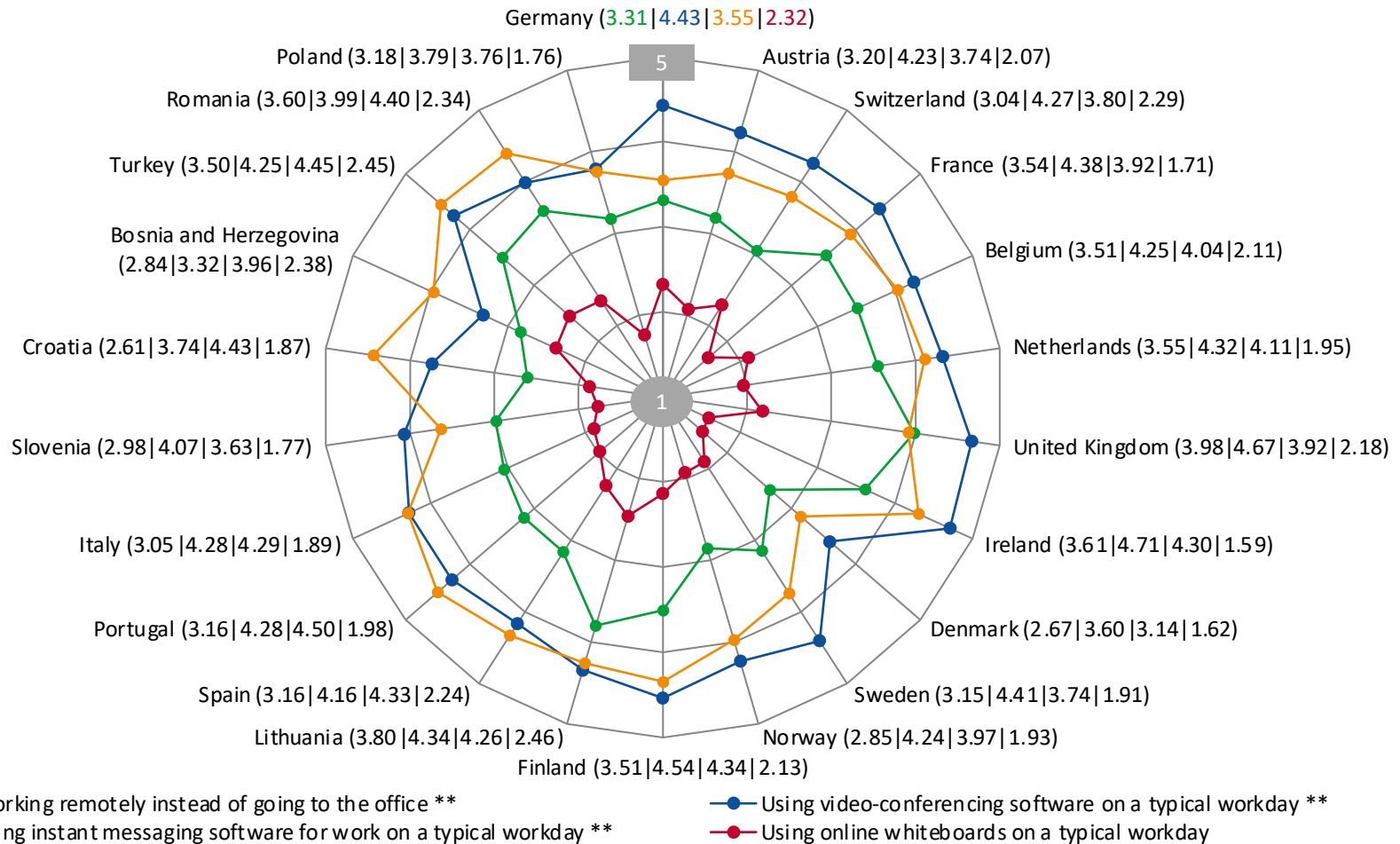
Every second communicator works regularly from home even when offices are open – the majority use video-conferencing; digital whiteboards are less common

Personal work situation of communication practitioners in Europe



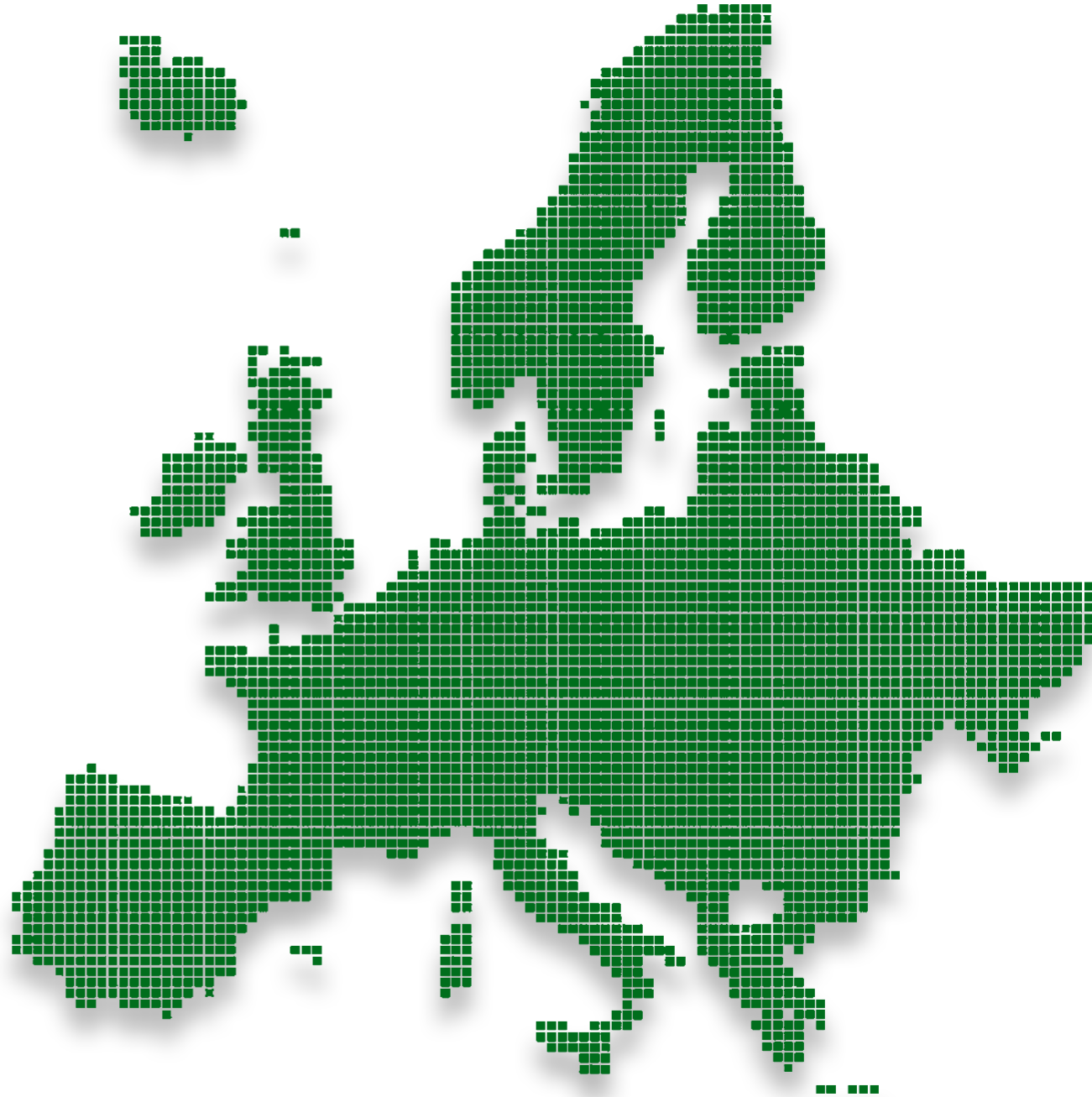
Work practices in the communications profession differ significantly across Europe

Personal work situation of communication practitioners



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,483 communication professionals from 22 countries. Q 18: Please tell us about your personal work situation when offices are open (i.e., if there are no closures due to a pandemic, extreme weather etc.). Scale 1 (Never) – 5 (Always). Mean values. ** Highly significant differences (ANOVA, p ≤ 0.01).

Salaries



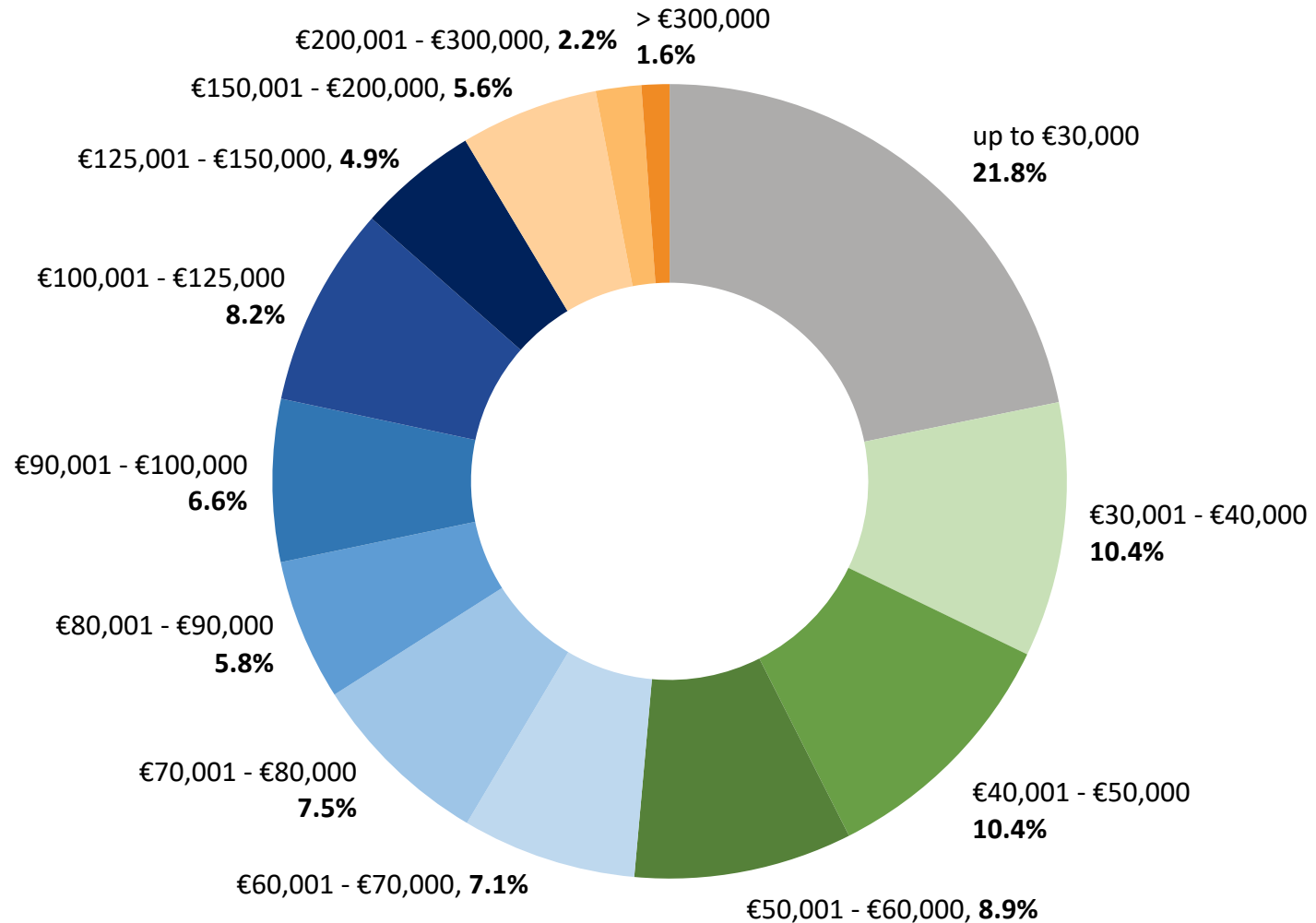
Salaries

Every year the ECM tracks data on salaries for communication professionals across Europe. Results show a rather stable picture for different categories and regions across the continent 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 ECM, 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 sample of up to 1,408 professionals who agreed to disclose their personal income. In 2022, nearly one in four respondents (22.5%) earn more than €100,000 per year. A very small group (81.6% of the sample) earns over €300,000 – the same percentage as the last two years. On the other hand, close to every third respondent makes between €30,001 and €60,000 per year, whilst 21.8% earns up to €30,000, which has remained nearly unchanged compared to previous years. A cohort of 35.7% remains in the middle income bracket, making between €50,001 and €100,000 annually. Compensation differs consistently between ranks as well. Annual salaries for top-level communicators are divided into thirds: those earning over €100,000 (40.7%, up from 32.1% in last year), those earning between €60,001 to €100,000 (30.0%, remained almost identical) and the last third earning up to €60,000 (29.3%, down from 37.2% last year). Most team leaders and members (35.3%) receive between €30,001 and €60,000 per year, while only 4.1 % make over €150,000, compared to 17.6% of top-level communicators' salaries exceeding this amount.

In most 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., 2020b). Last year the largest share of practitioners reporting the lowest annual income were working in private companies (Zerfass et al., 2021a), in 2022 it is employees in joint stock companies. Further, while the relative number of communicators in private companies gradually decreases from €80,000 and higher, joint stock companies have increasing numbers of employees earning between €90,000 and up to €200,000. This mirrors salary data from recent years. Interestingly, salaries in non-profit organizations in the brackets between €90,000 and €125,000 have more than doubled compared to 2021. Salary differences between female and male practitioners are consistent with longitudinal analysis and literature on the gender pay gap (Topić et al., 2020; Zerfass et al., 2020b). Salaries reported by female practitioners are lower compared to male communicators, both for top positions and other hierarchical levels. About one out of ten female heads of communications or agency CEOs earns more than €150,000, while almost one in four of their male peers do.

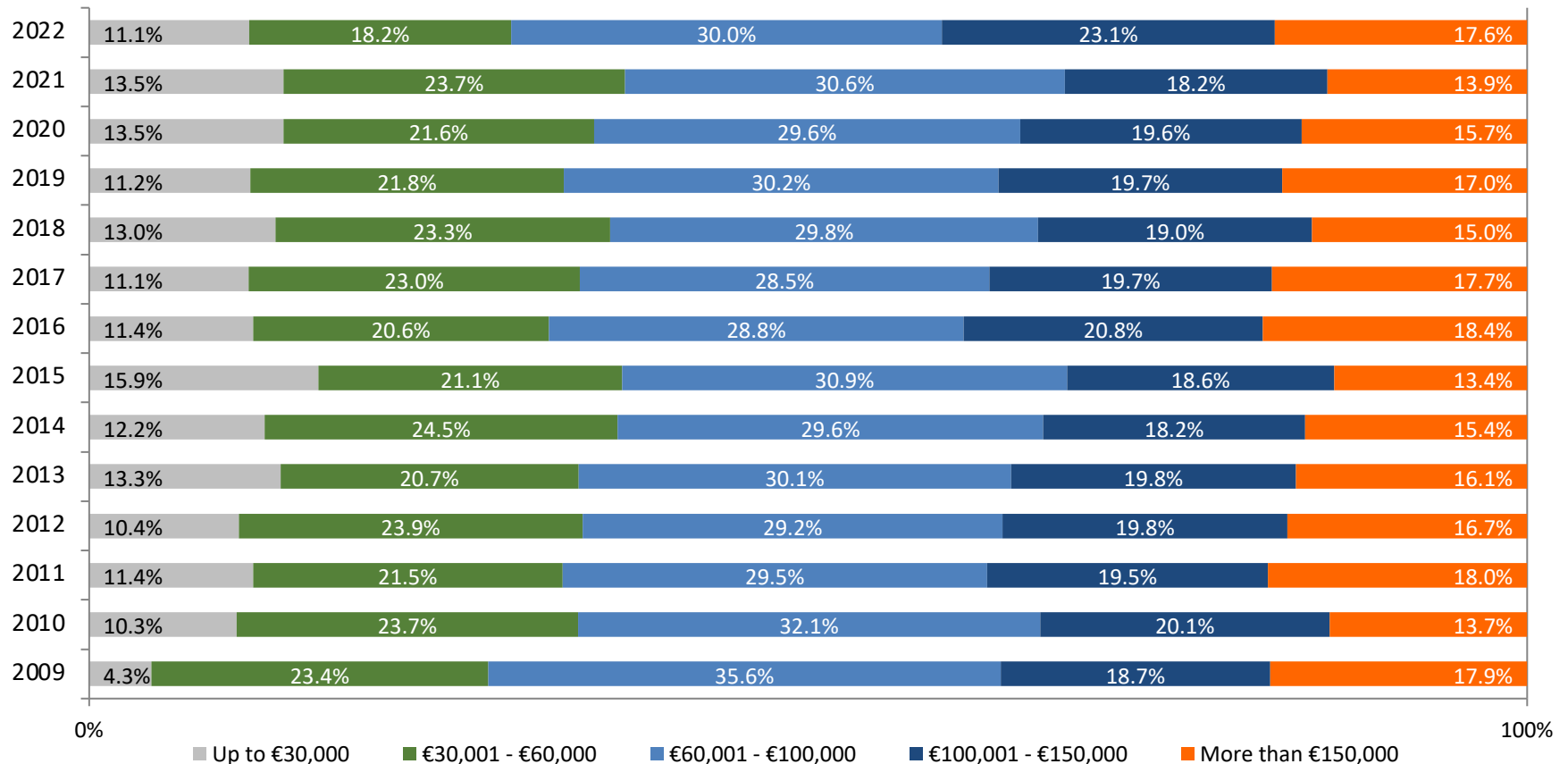
Ever since the ECM reported salaries across the continent, pay is higher in Northern and Western Europe. Switzerland is, by far, the country where communicators earn most with one out of two making more than €150,000 per year. The United Kingdom (31.1%), France (14.3%) and Germany (13.1%) are additional countries with a good share of high salaries. These figures reflect the large variation of average salaries and living costs in the 22 countries analysed (Eurostat, 2021). Like last year, a general reduction of income for communication professionals due to the pandemic (DataEuropaEU, 2020) or shrinking economies is not noticeable across Europe.

Basic annual salary of communication practitioners in Europe 2022



Longitudinal tracking of top level communicators' salaries in Europe

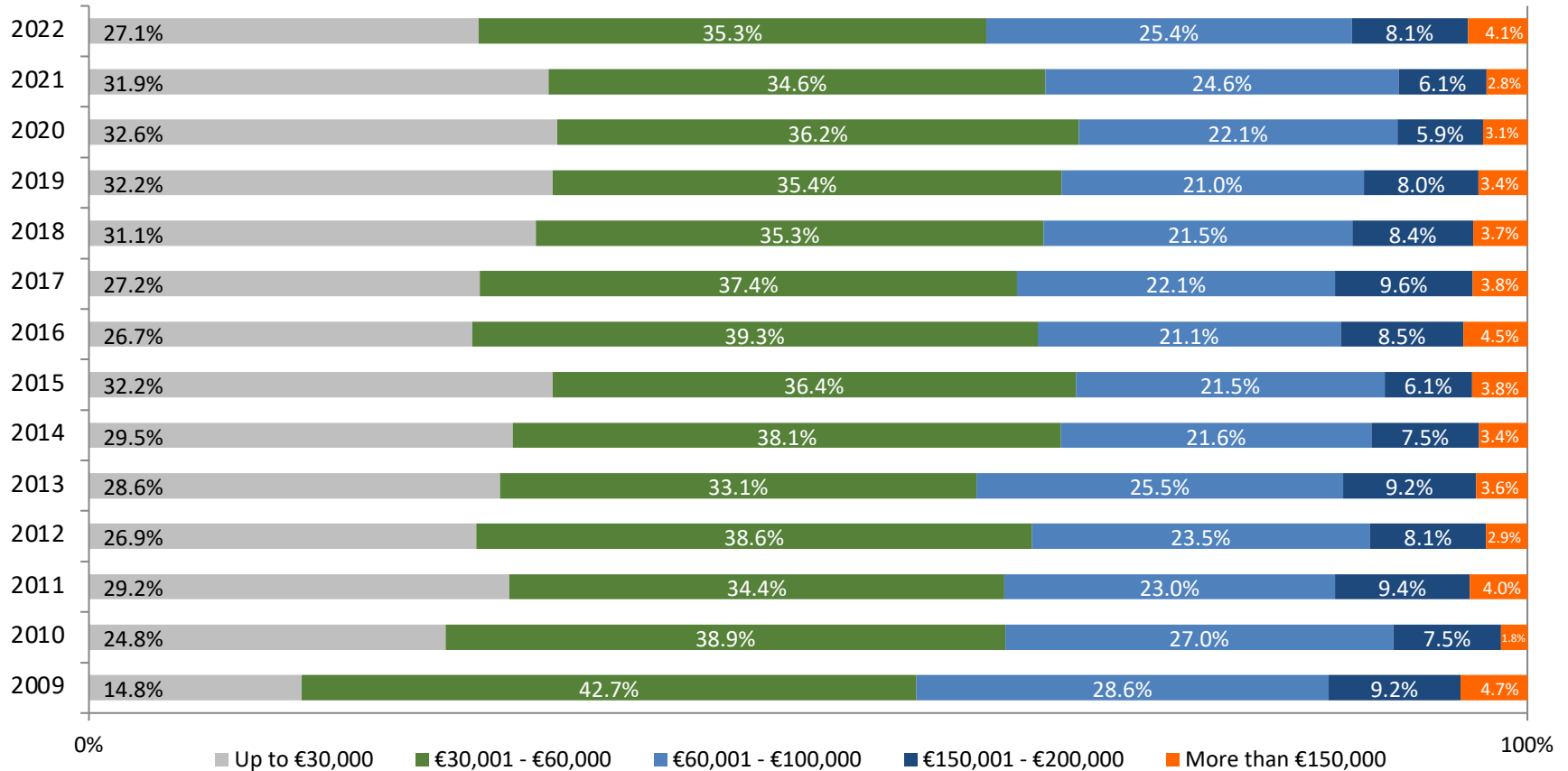
Basic annual salary (Heads of communication departments and agency CEOs)



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 467 heads of communication and agency CEOs (Q 36); Zerfass et al. 2021a / n = 784 (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

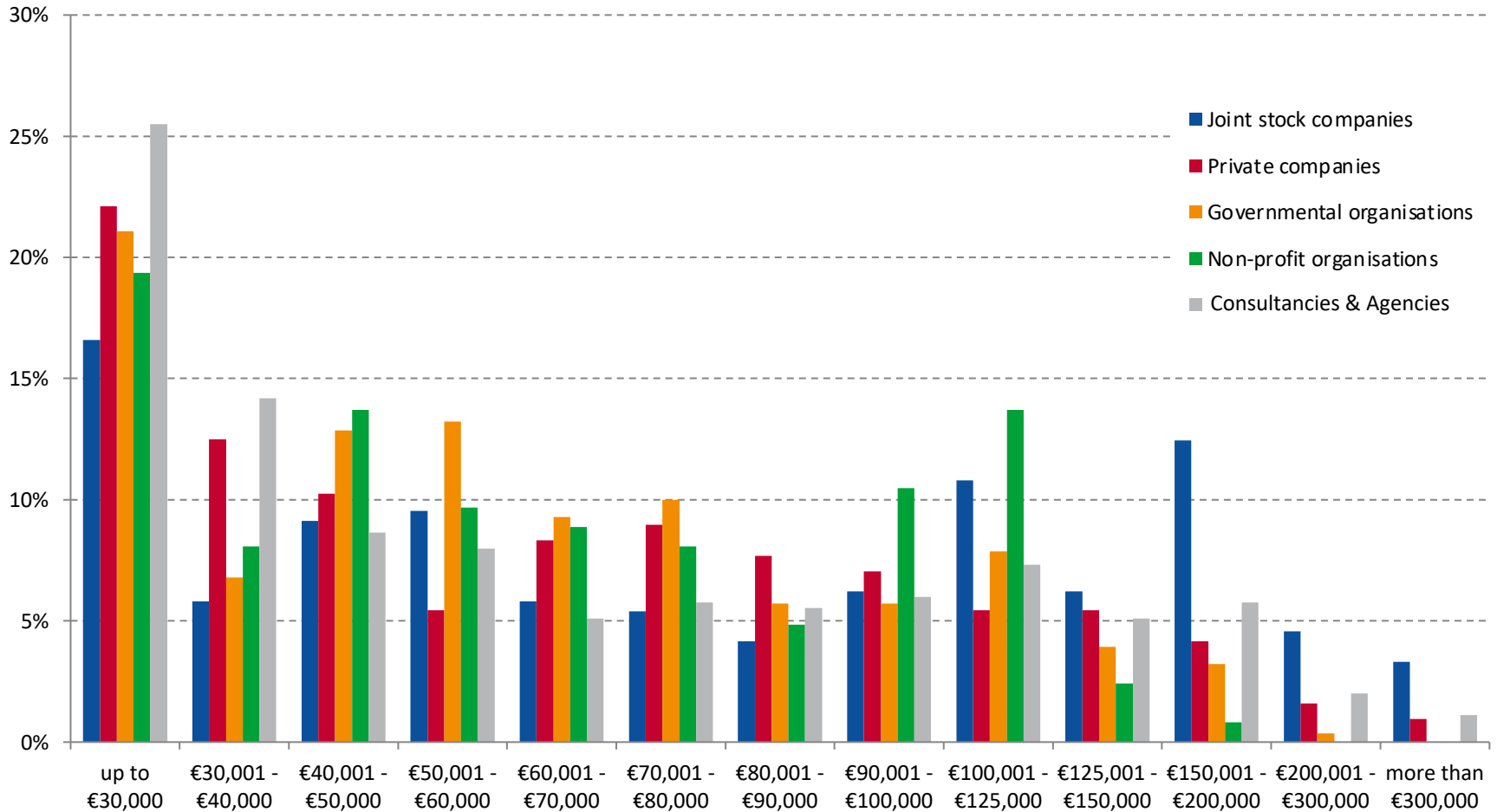
Basic annual salary (Unit leaders, team leaders, team members, consultants)



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 941 communication professionals below the top level of the hierarchy (Q 36); Zerfass et al. 2021a / n = 1,409 (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.

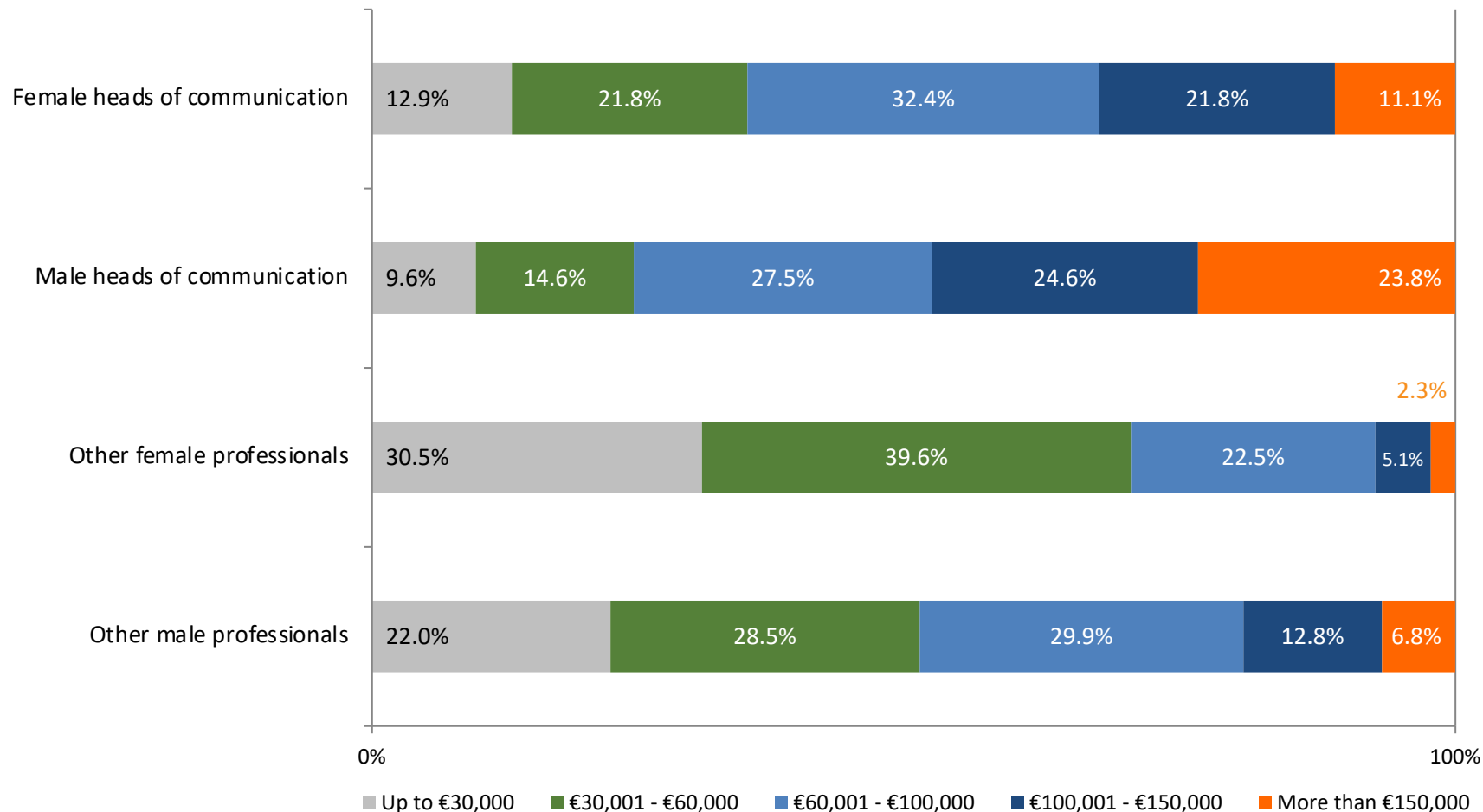
Annual salaries in different types of organisations

Basic annual salary (all communication practitioners)

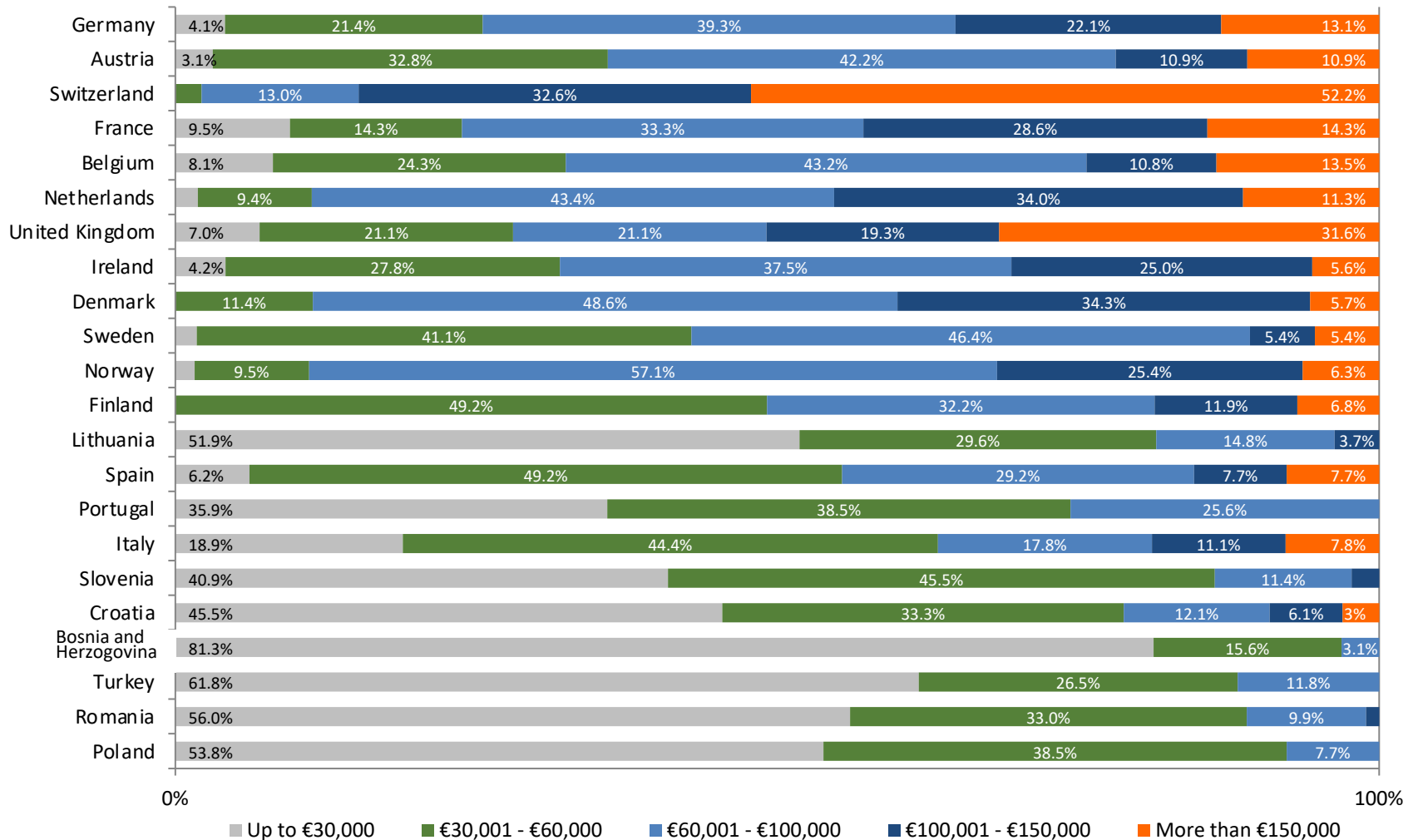


Salary differences between female and male practitioners

Basic annual salary (all communication practitioners)

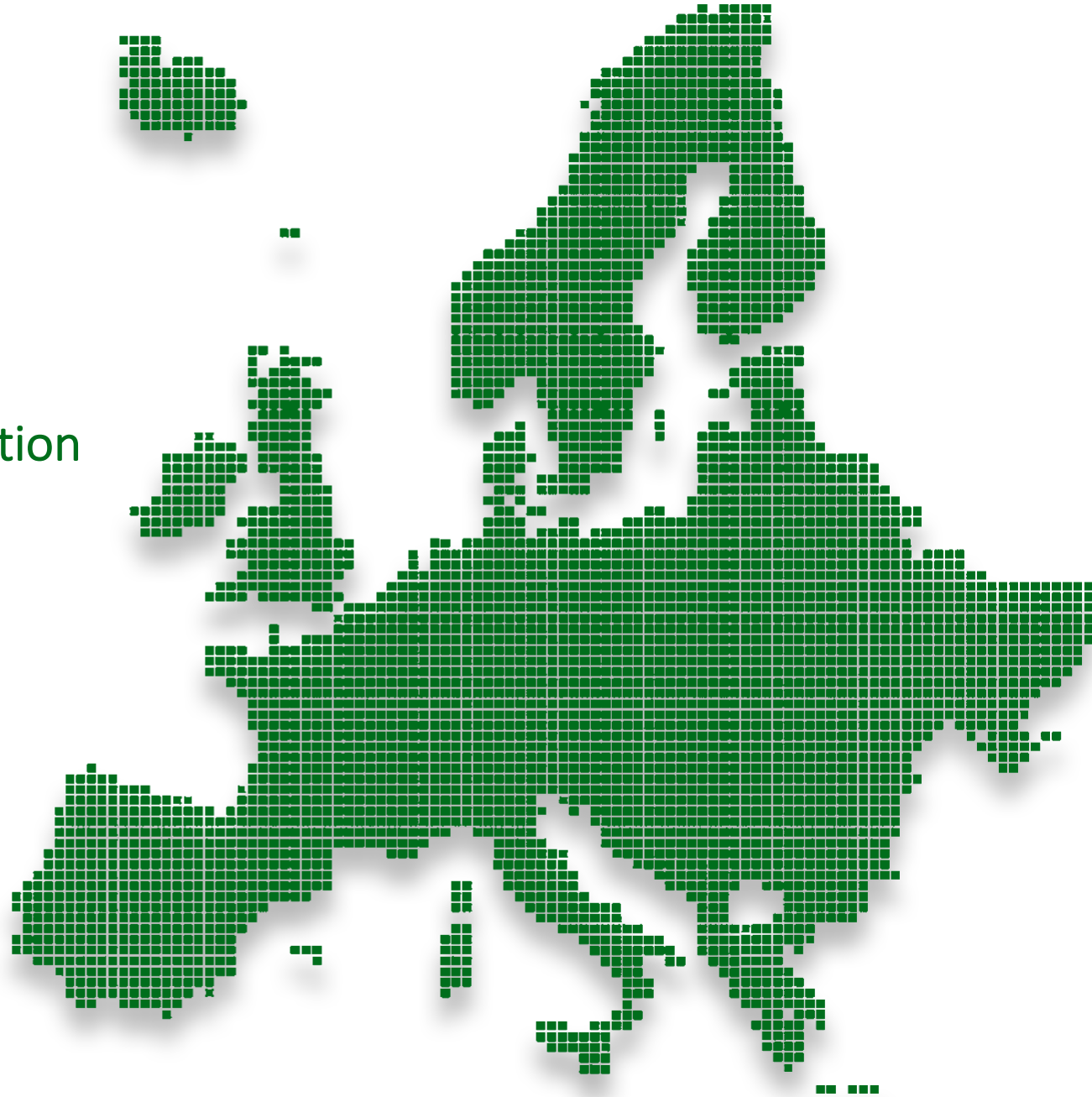


Spread of annual salaries for communicators across Europe



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,189 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 European Communication Monitor and parallel studies in the global monitor series 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 (Tench et al., 2017; Verčič & Zerfass, 2016) is applied (see page 90 for details).

Statistical analyses are used to differentiate excellent from non-excellent communication departments. After obtaining the two groups, differences in characteristics are analysed. 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 components is calculated on the basis of four dimensions. Only organisations clearly outperforming in all four dimensions are considered as excellent. Our data show that close to one quarter of the communication departments can be considered excellent (22.6%), while the majority (77.4%) do not fall into this category. This is consistent with previous studies in Europe and in other regions.

Excellent communication departments differ from others in numerous ways. Many aspects have been identified in the Global Communication Monitor surveys on different continents. Interestingly, the manifestations for specific dimensions are common across the world, as shown in our compilation and interpretation of key insights for Europe and Asia-Pacific (Tench et al., 2017; Zerfass et al., 2021b).

Looking into topics researched in this survey, it is notable that excellent communication departments clearly put a stronger emphasis on some issues: They are not only significantly more often involved in communicating diversity, equality and inclusion initiatives and anticipate a greater impact of DEI, but they also are more often in charge of developing DEI policies for their organisations. Further, leaders of excellent communication departments engage significantly stronger in all dimensions of empathic leadership. Accordingly, communication practitioners working in excellent departments show stronger commitment, engagement and mental health and they are, at the same time, less likely to quit their job.

When it comes to dimensions of digital transformation, excellent communication departments are clearly ahead of others, driving innovation and early adoption of CommTech and digital infrastructure. Conversely, the challenges for implementing CommTech are generally perceived as less severe in excellent departments. Relatedly, also flexible and remote work, as well as the use of digital real-time collaboration tools, are much more established than in other communication departments.

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)

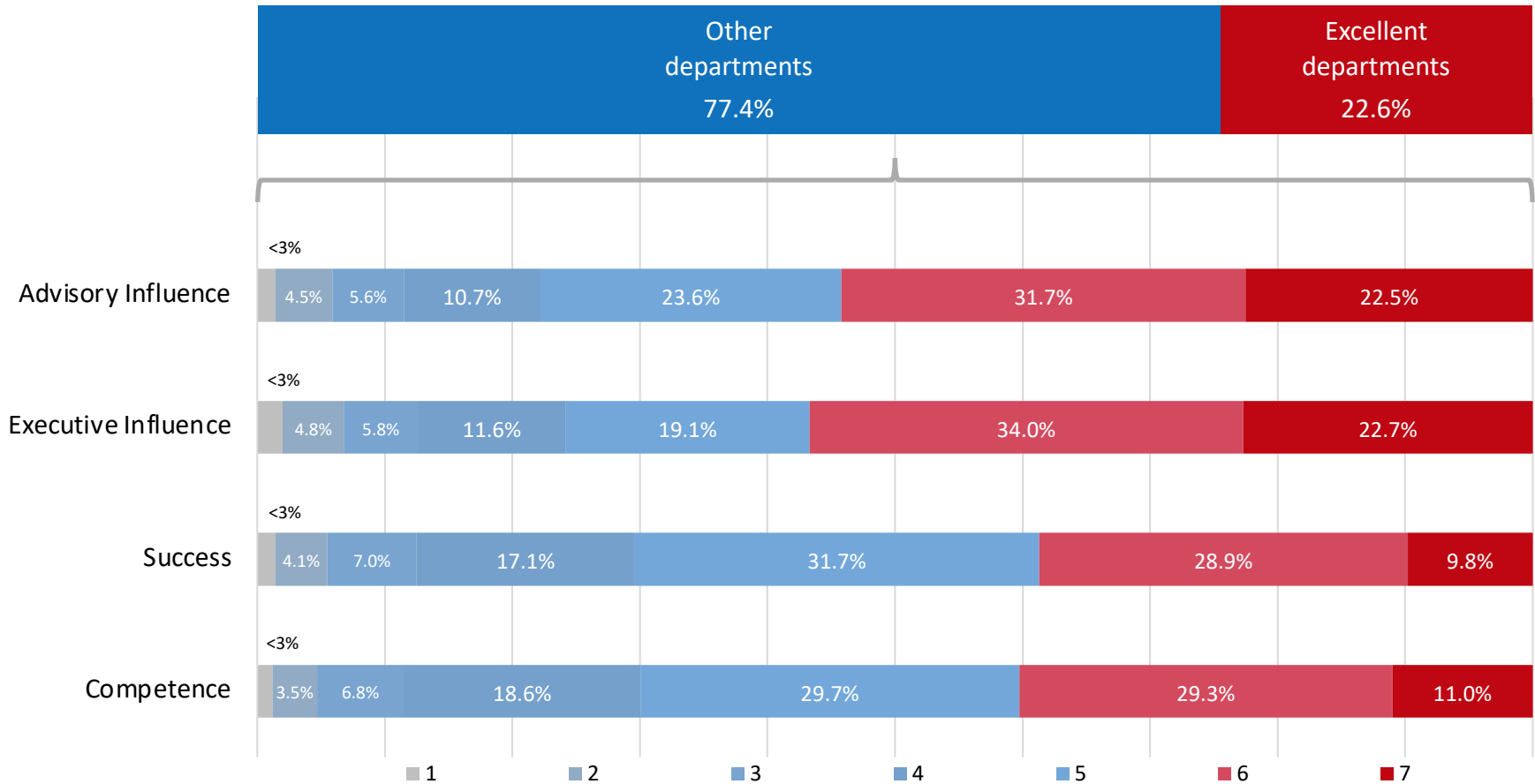
The communication of the organisation is (much) more successful compared to those of competing organisations

COMPETENCE

(Q 26)

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

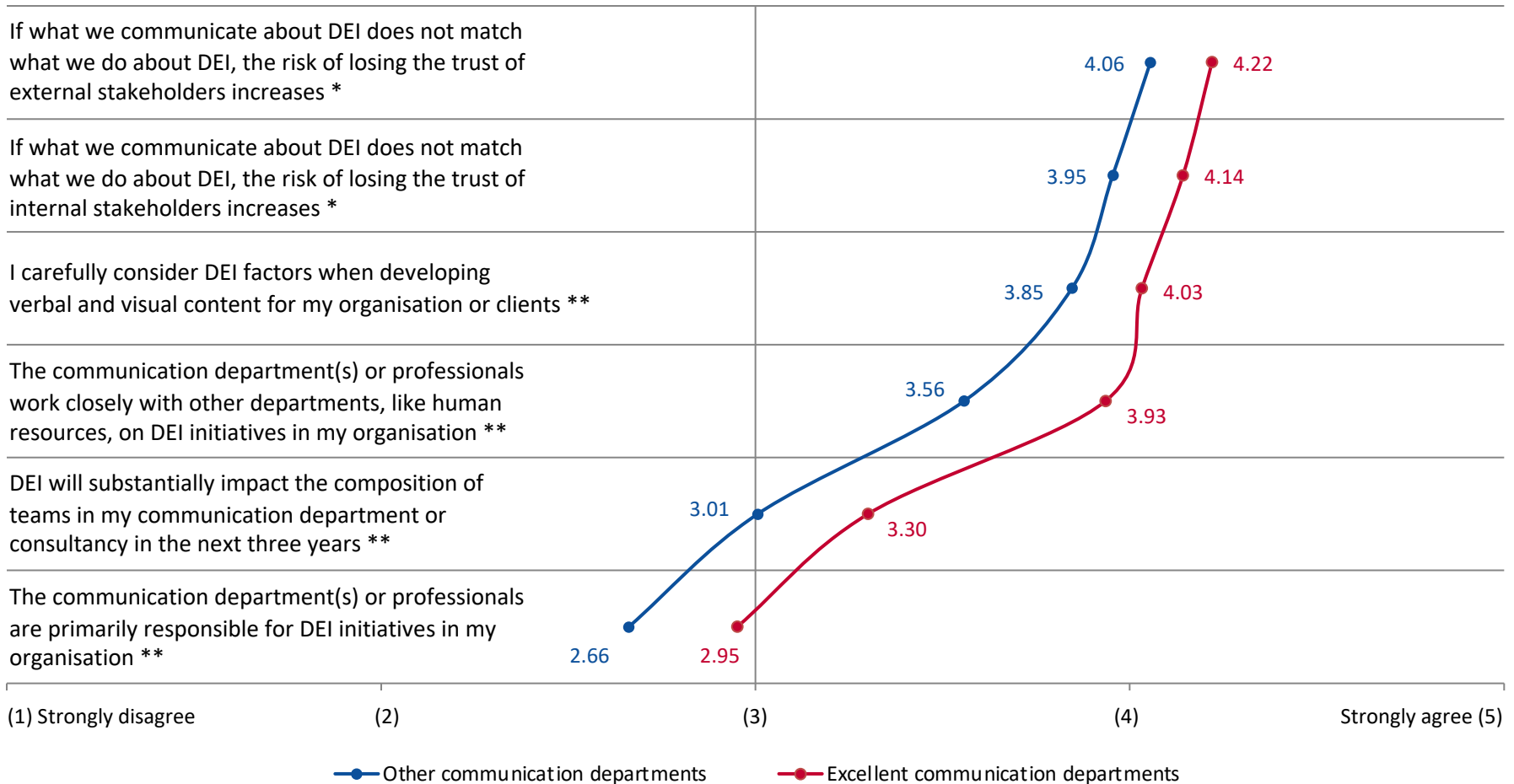
Excellent communication departments in the sample



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,121 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.

Excellent communication departments are significantly more often involved in diversity, equality and inclusion initiatives and anticipate a greater impact

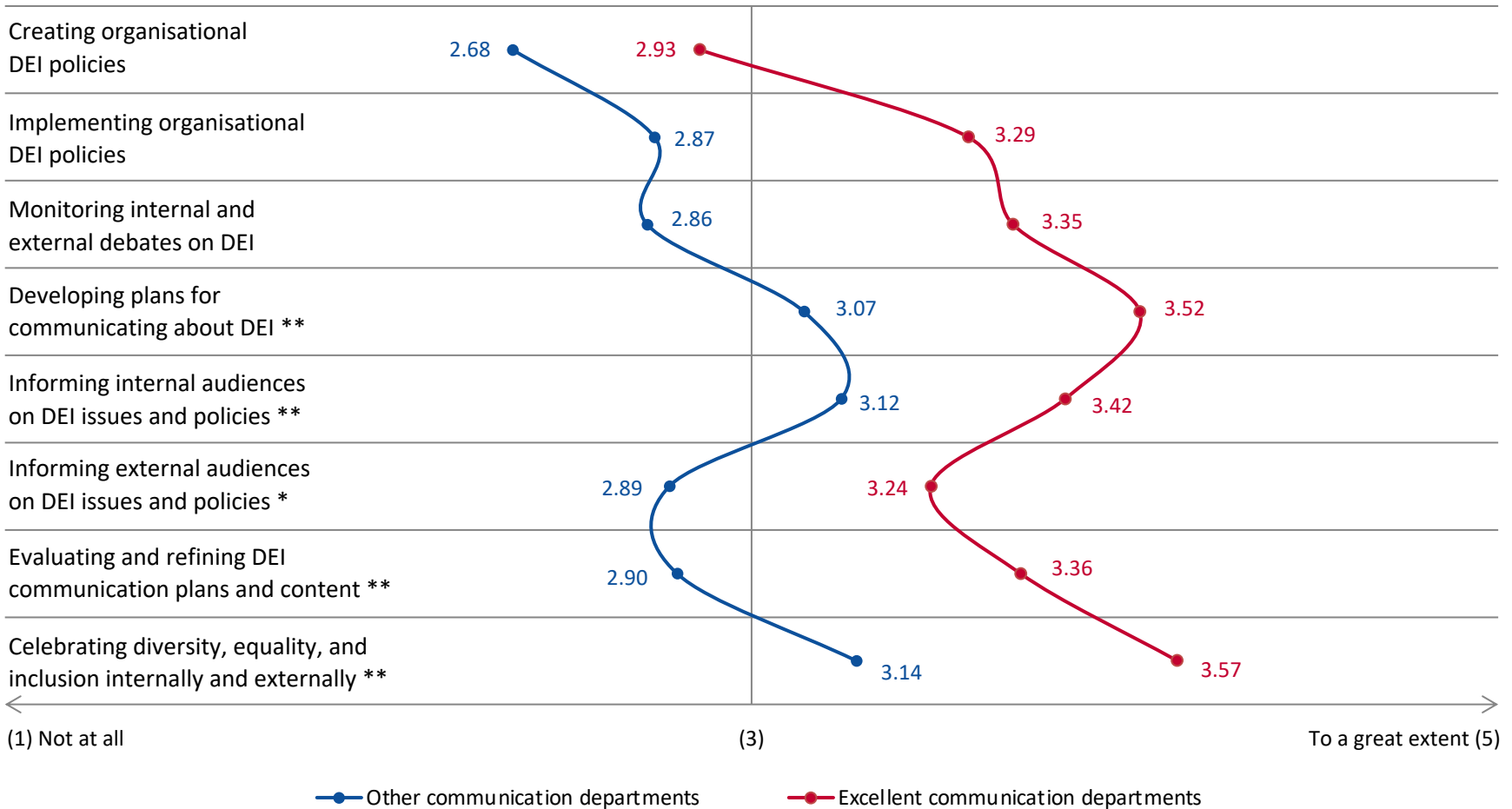
Impact of diversity, equality and inclusion on communications



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,082 communication professionals in communication departments. Q11: The debate on diversity, equality, and inclusion in organisations and society might influence communications in different ways. When thinking of your own organisation, how much would you agree with the following statements? Scale 1 (Strongly disagree) – 5 (Strongly agree). Mean values. ** Highly significant differences (independent samples T-Test, $p \leq 0.01$). * Significant differences (independent samples T-Test, $p \leq 0.05$).

Excellent communication departments are more often in charge of developing DEI policies, but they are also more active in communicating them

Responsibilities of communication units for DEI initiatives

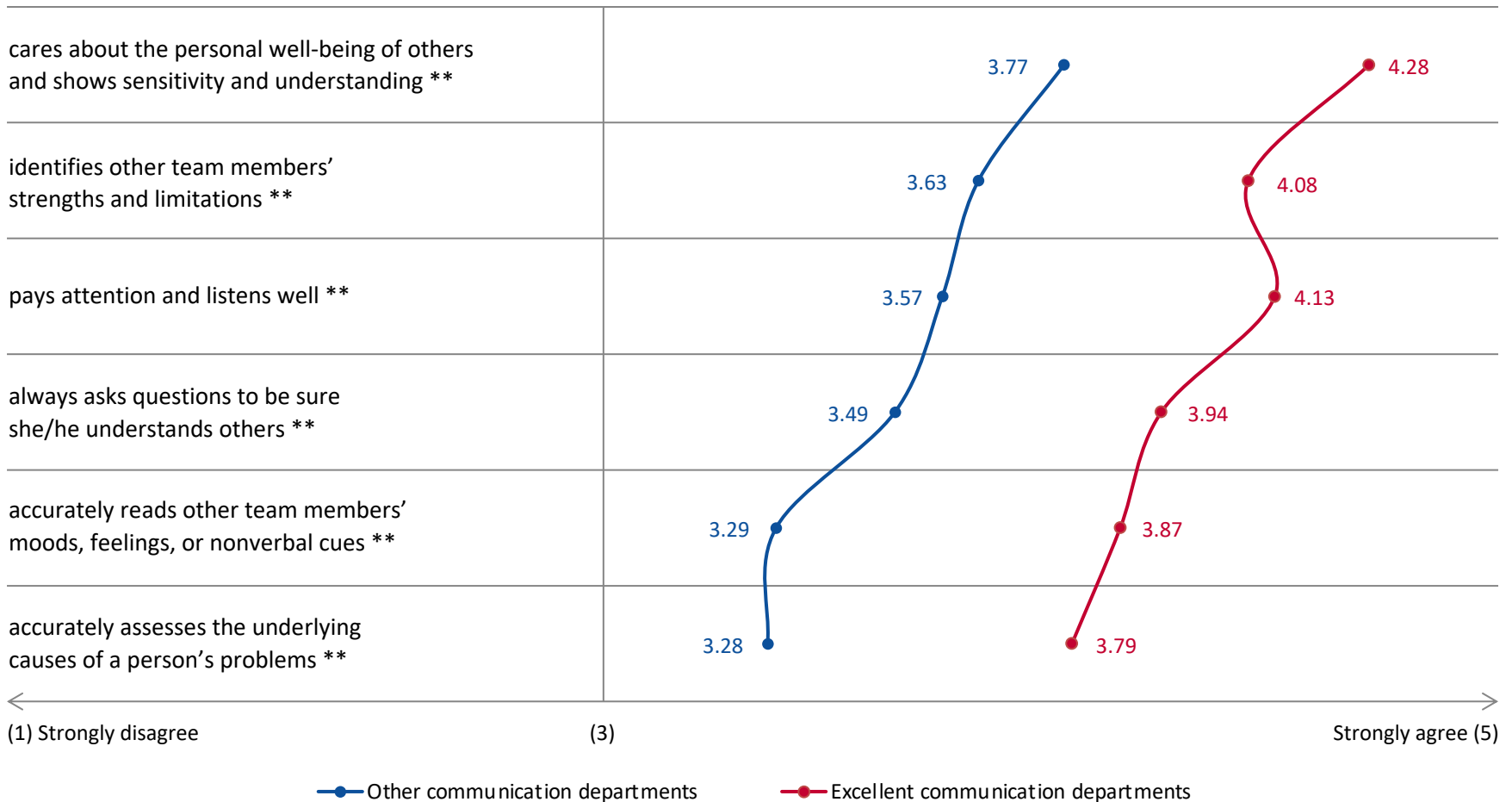


www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,082 communication professionals in communication departments. Q13: To what extent does your department or agency actively engage in establishing or communicating diversity, equality, and inclusion (DEI) policies for your organisation or clients in the following ways? Scale 1 (Not at all) – 5 (To a great extent). Mean values. ** Highly significant differences (independent samples T-Test, p ≤ 0.01).

* Significant differences (independent samples T-Test, p ≤ 0.05).

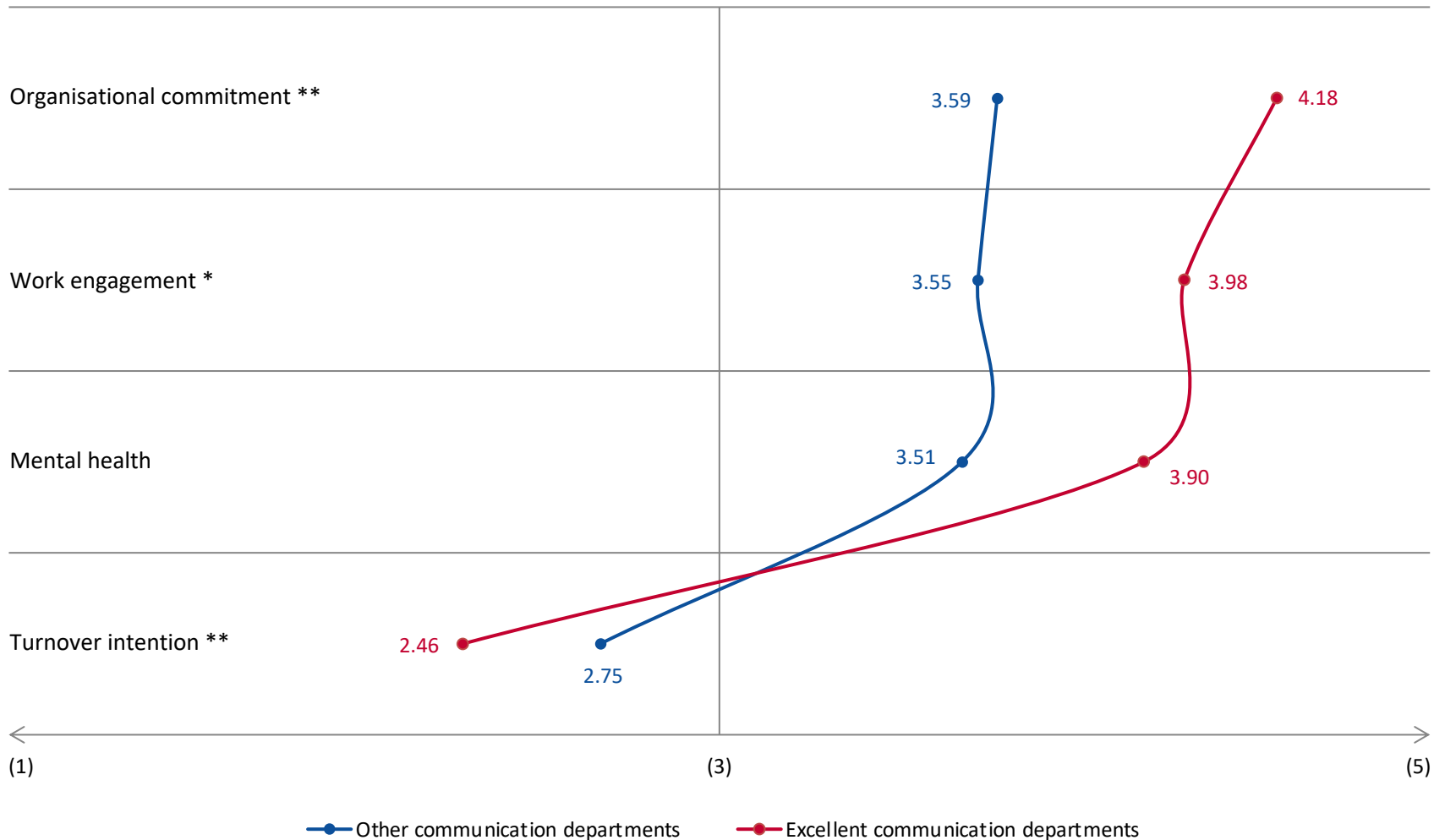
Leaders of excellent communication departments engage more powerfully in all dimensions of empathic leadership

The communication leader ...



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,090 communication professionals in communication departments. Q15: And to what extent do you agree with the following? Scale 1 (Strongly disagree) – 5 (Strongly agree). Mean values. ** Highly significant differences (independent samples T-Test, $p \leq 0.01$).

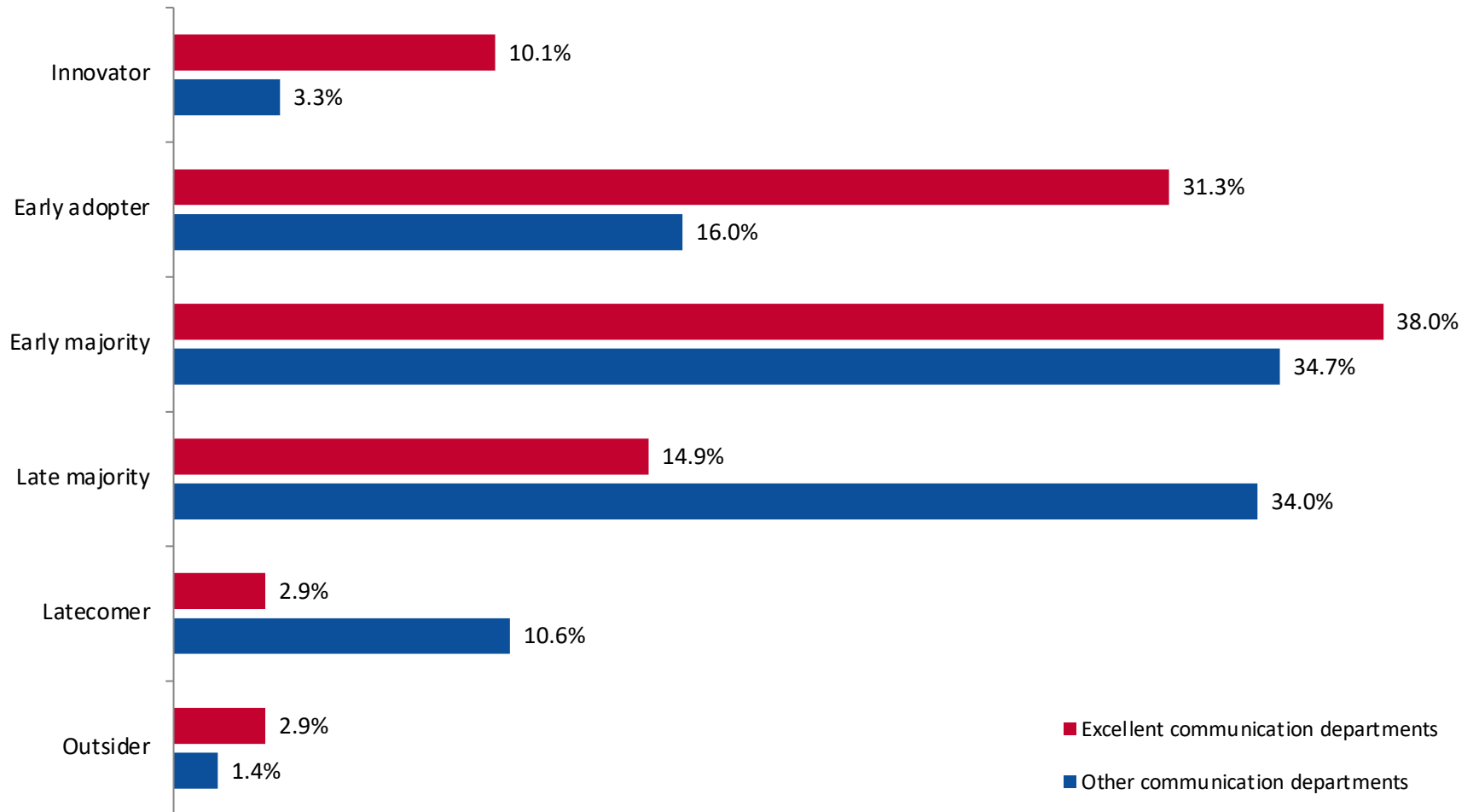
Communication practitioners working in excellent departments show stronger commitment, engagement and mental health; they are less likely to quit their jobs



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,121 communication professionals in communication departments. Q 16: Thinking of your daily work as a communication practitioner, to what extent would you agree with the following? Scale 1 (Strongly disagree) – 5 (Strongly agree). Mean values of indices. ** Highly significant differences (independent samples T-Test, p ≤ 0.01). * Significant differences (independent samples T-Test, p ≤ 0.05).

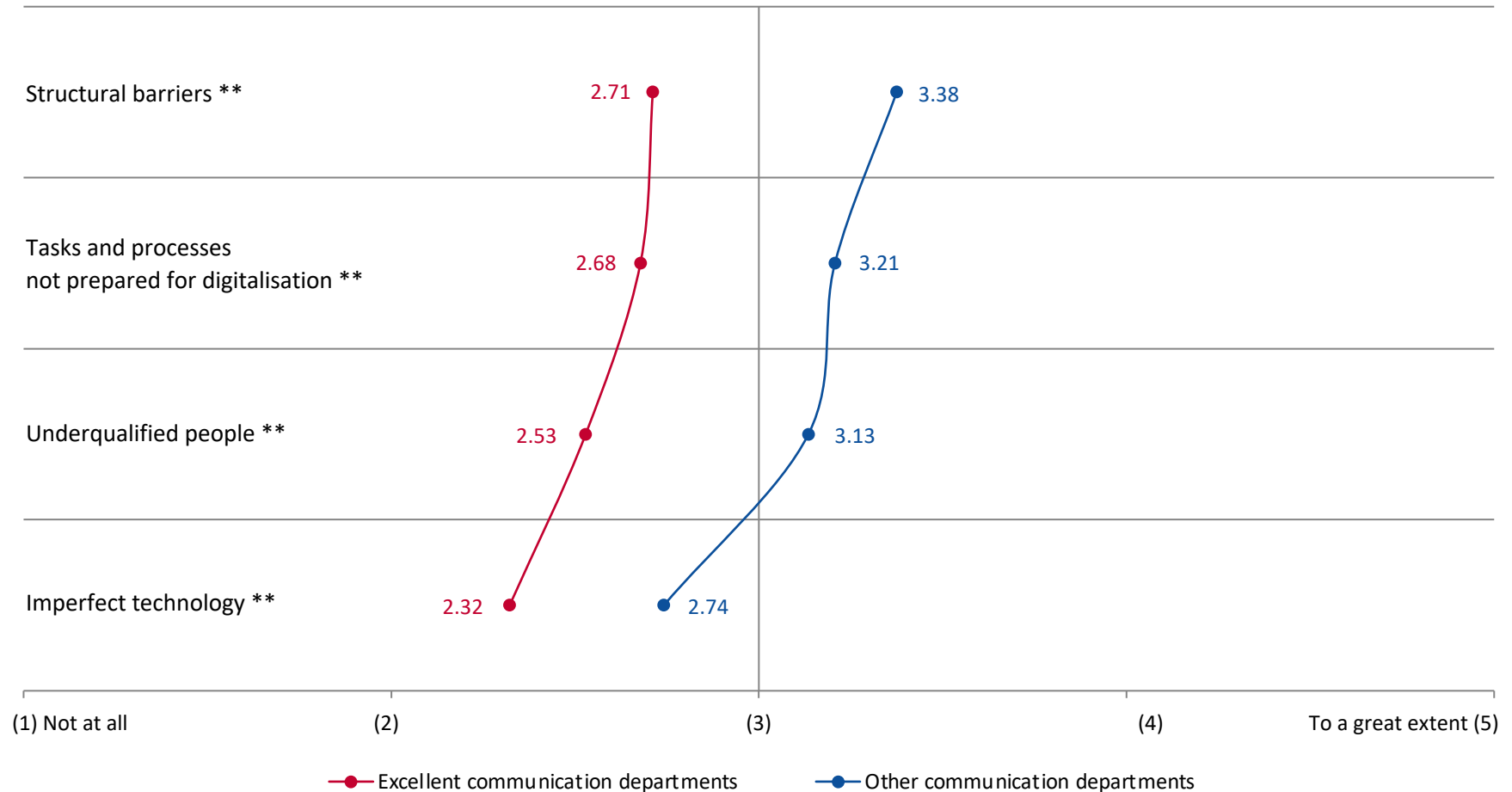
Excellent communication departments are clearly ahead of others regarding digital transformation

Degree of digitalisation and CommTech use in communication units

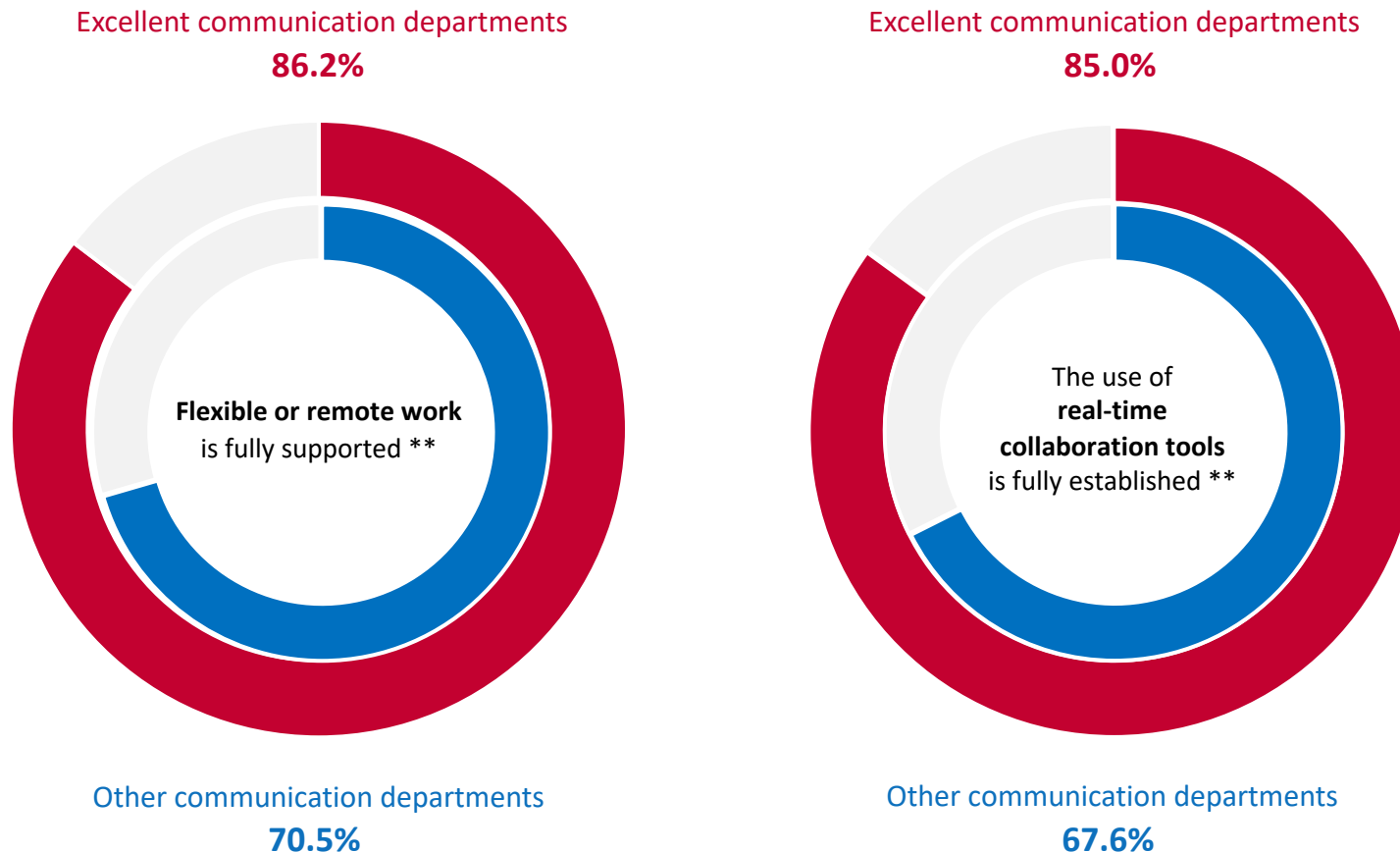


The barriers for implementing CommTech are generally lower in excellent departments

Challenges of introducing CommTech in communication units



Flexible and remote work, as well as the use of real-time collaboration tools, are much better established in excellent communication departments

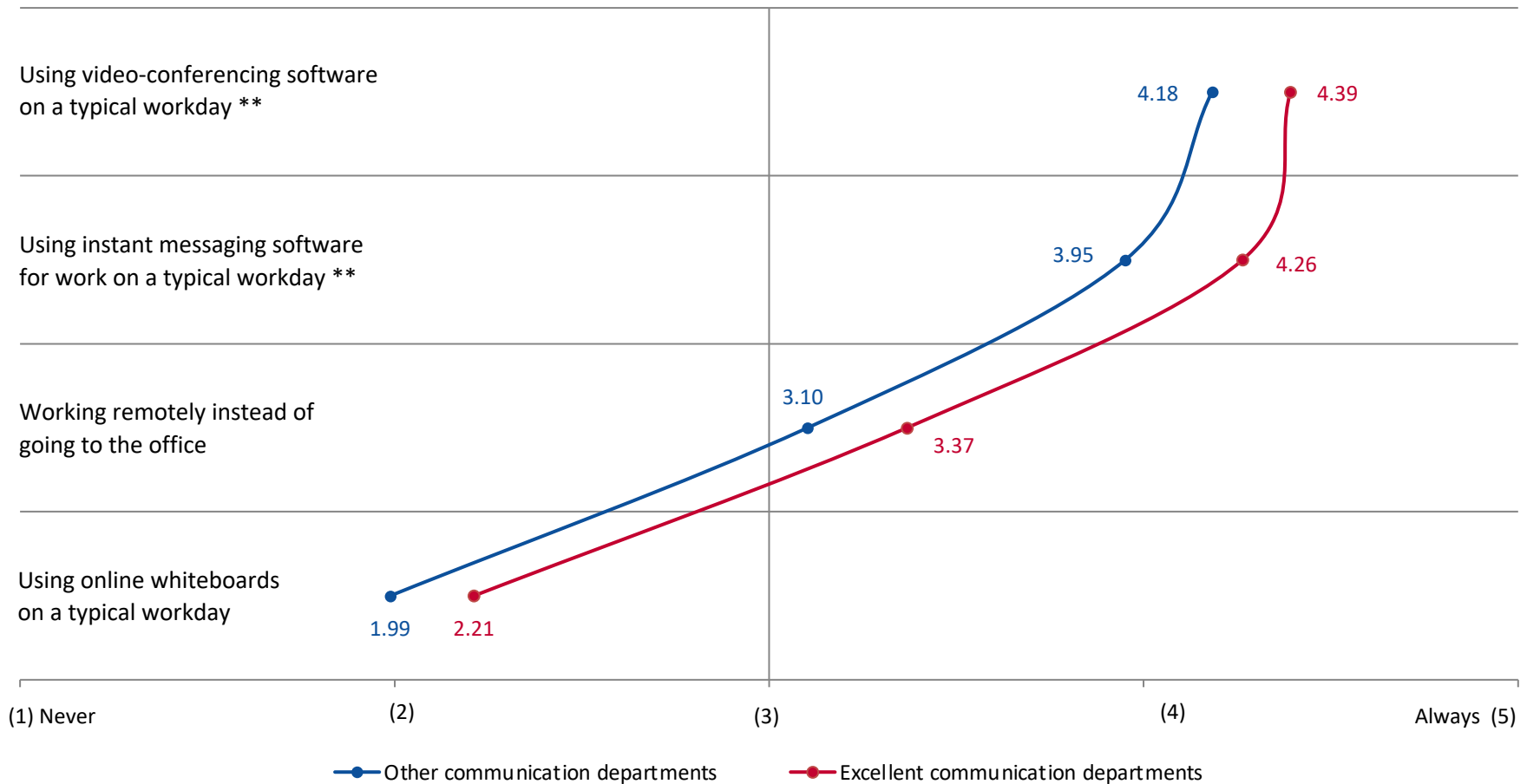


www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,121 communication professionals in communication departments. Q17: How would you describe the overall situation in your communication department or agency? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequencies based on scale points 4-5.

** Highly significant differences (chi-square test, $p \leq 0.01$).

Communication professionals in excellent departments work more often remotely and use digital collaboration tools to a greater extent

Personal work situation of communication practitioners



www.communicationmonitor.eu / Zerfass et al. 2022 / n = 1,108 communication professionals in communication departments. Q18: Please tell us about your personal work situation when offices are open (i.e., if there are no closures due to a pandemic, extreme weather etc.). Scale 1 (Never) – 5 (Always). Mean values. ** Highly significant differences (independent samples T-Test, $p \leq 0.01$).

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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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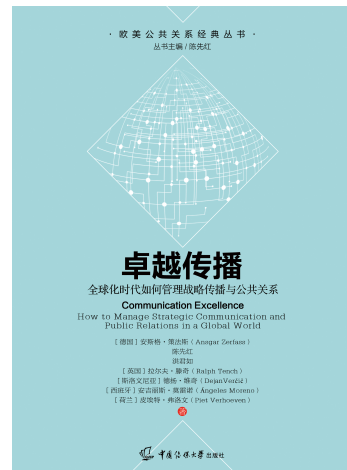
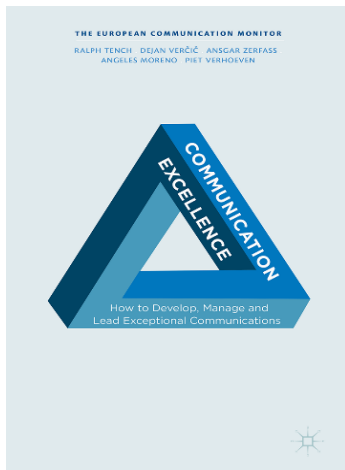
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