

EUROPEAN COMMUNICATION MONITOR 2020

**ETHICAL CHALLENGES, GENDER ISSUES,
CYBER SECURITY, AND COMPETENCE GAPS
IN STRATEGIC COMMUNICATION.
RESULTS OF A SURVEY IN 44 COUNTRIES.**

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ETHICAL CHALLENGES, GENDER ISSUES, CYBER SECURITY,
AND COMPETENCE GAPS IN STRATEGIC COMMUNICATION.
RESULTS OF A SURVEY IN 44 COUNTRIES.

Ansgar Zerfass, Piet Verhoeven, Ángeles Moreno, Ralph Tench & Dejan Verčič

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

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Please contact national EUPRERA researchers at universities in your country listed on page 128 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



This year's European Communication Monitor is published in the midst of the global Covid-19 pandemic. An unprecedented global health crisis affecting individuals, companies and communities across the globe. Partly as a result of a pretty decisive approach from world leaders and a global lock downs, the health crisis is accompanied by an economic setback of a still unknown magnitude which will bring with it its own set of issues.

As communicators, we know that communications always is a key part of any successful strategy execution. In times of radical disruption and uncertainty, it becomes evident for everyone, that as communicators we have an important role to help bring out the facts, facilitate dialogue and create shared meaning that will enable individuals, communities and organisations to respond to the crisis and move forward in a balanced and sustainable way. That role comes with a lot of opportunity to have a real impact, but also an obligation to reflect on our roles, responsibilities, the skills we need to be able to do our job well and the ethical dilemmas we face.

Nobody knows how the current crisis will develop or what the post Covid19 world will look like in terms of how we view the world, interact with each other, live our lives or go to work. I am quite sure that communications will remain a key priority for every community, organisation, corporation and leader who wants to be successful.

This also means that the opportunities and responsibilities we have as communicators will increase and that as a community we should continue to connect, exchange ideas and experience, promote best practice, discuss ethics, develop new skills and learn from each other. This is why the EACD exists. We are a diverse and vibrant community of communicators from all over Europe – and beyond – who are passionate about what we do, with a drive to do it even better and who come together to discuss this through a variety of activities. If you are not already a member – I encourage you to join us!

We are very proud to present this report, a joint project with EUPRERA for more than a decade. It sheds light on some of the key issues and opportunities we are facing as communicators. I hope that you will enjoy digesting the insights and be able to apply them in your strategic communications going forward.

Kim Larsen

*EVP, Head of Group Communications, Brand & Marketing, Danske Bank
Acting President, European Association of Communication Directors*

Introduction



Communication professionals across Europe face challenging times. They try to keep consumers and employees informed and satisfied during a global pandemic that has turned our societies upside down. At the same time, many are working from home, taking care of kids and family members – sometimes even with uncertainty about their own future employment. But every crisis holds opportunities.

Communication leaders need to think about the time after the downturn. Which competencies are needed in the future to ensure that communication departments and agencies get a larger bit of the cake in the next upswing? What type of contribution can communications make in the field of cyber security, a prevalent issue for remote work that is likely to be part of all jobs to a larger extent? Are mobile media really taking off now, or will there be a renaissance of traditional mass media and press relations? And how

can we create a better future for the profession – a future that enables practitioners to deal with ethical challenges of digital technologies and that makes it easier for women to reach the top positions in communication departments and businesses?

The European Communication Monitor 2020 explores these issues, and it identifies longitudinal developments in the field topics. The study provides insights that can stimulate internal debates in communication teams about their future set-up, and the data can be used to benchmark your own position with similar organisations or professionals in the sample.

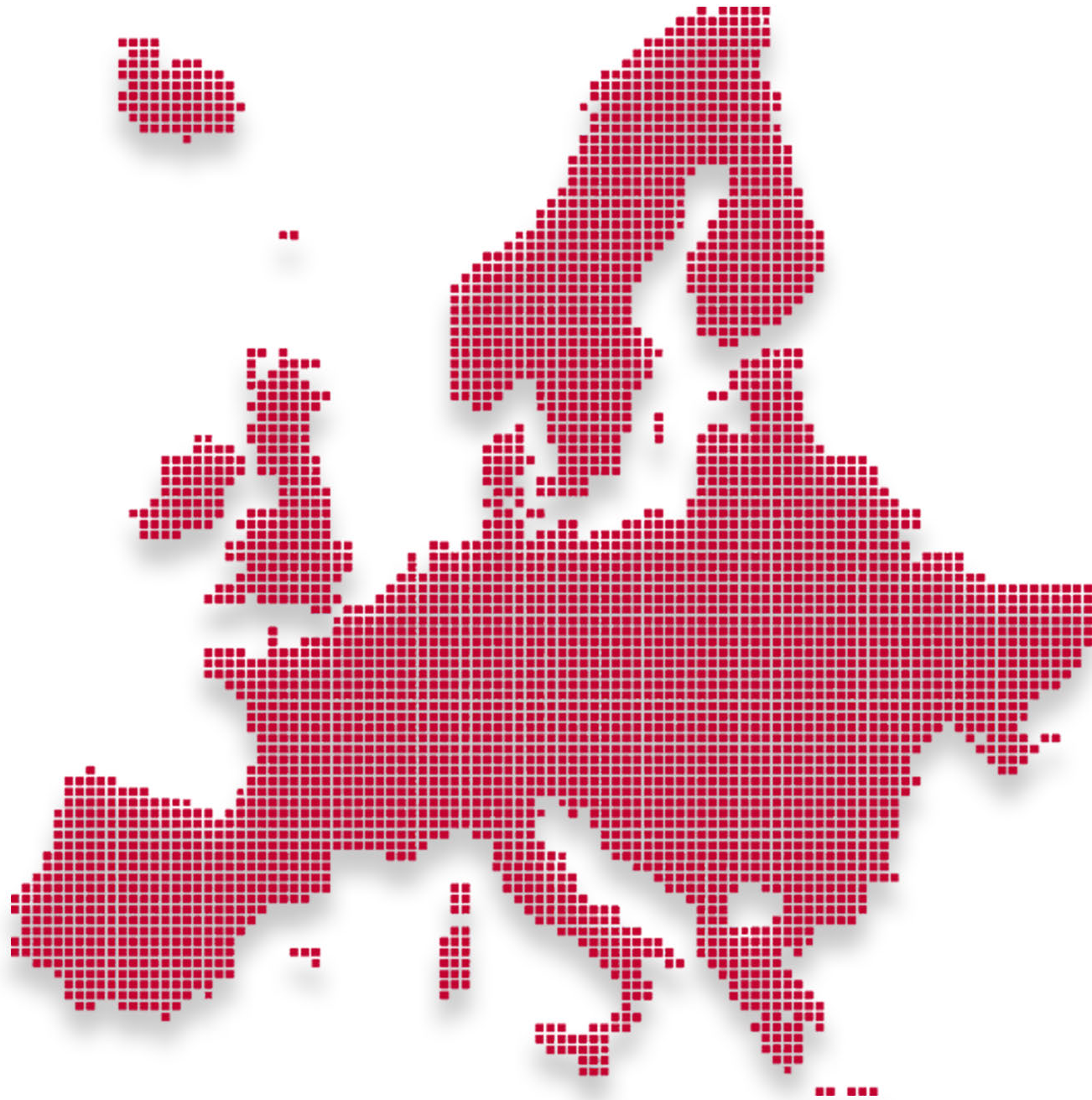
The 14th edition of our annual study is based on responses from 2,324 communication professionals working in companies, non-profits, governmental organisations and agencies from 44 European countries. Detailed analyses are available for 22 countries. This makes the monitor the largest regular study of the field worldwide – and the only truly global research of its kind in conjunction with the North American, Latin American and Asia Pacific Communication Monitors.

On behalf of the research team, I would like to thank all professionals who participated in the survey. The support of our premium partner Cision Insights, digital communications partner Fink & Fuchs, and regional partners NORA in the Nordic countries and CECOMS in Italy made this extensive research possible. Many thanks to all national collaborators at renowned universities across Europe, to Jens Hagelstein and Ronny Fechner, and to the EACD, namely Angela Howarth from the board of directors.

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

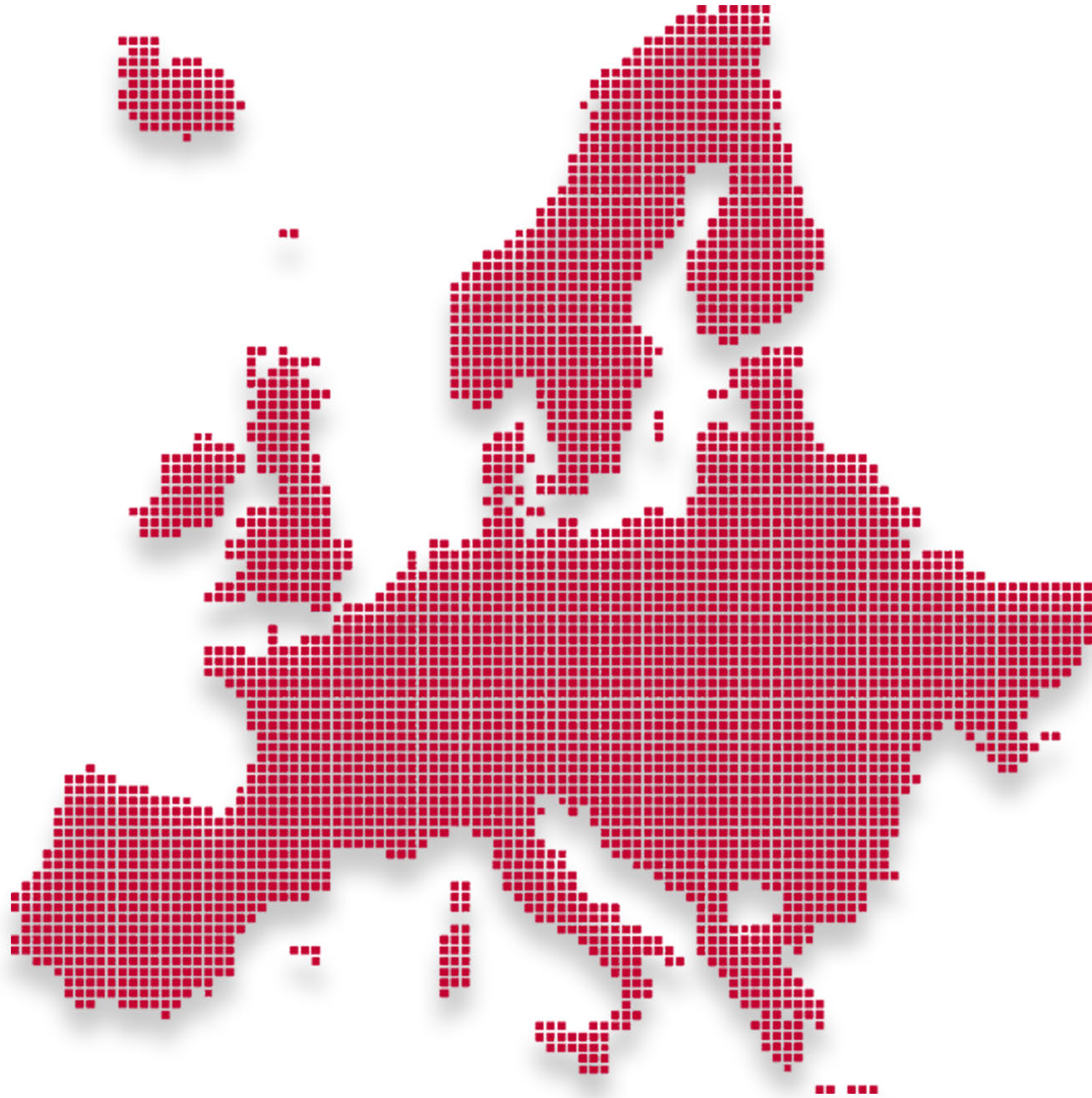
The European Communication Monitor (ECM) 2020 explores current practices and future developments of strategic communication in companies, non-profits and other organisations including communication agencies across Europe. It is the 14th annual edition of a survey that has been conducted since 2007, and part of the Global Communication Monitor series with parallel 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 Insights and Fink & Fuchs as digital communications partner. The Nordic Alliance for Communication & Management hosted by BI Norwegian Business School, Oslo, and the Center for Strategic Communication at IULM University, Milan, support the project as national 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, Piet Verhoeven, Ángeles Moreno, Ralph Tench and Dejan Verčič. A wider board of professors and national research collaborators ensure that the survey reflects the diversity of the field across Europe. This edition is based on responses from 2,324 communication practitioners from 44 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 regarding the professional and his/her organisation, as well as perceptions on developments in the field.

The study explores four constructs. Firstly, developments and dynamics in the field of strategic communication (Falkheimer & Heide, 2018; Holtzhausen & Zerfass, 2015; Nothhaft et al., 2019) and public relations (Tench & Yeomans, 2017) are identified by longitudinal comparisons of strategic issues, communication channels and ethical challenges. To this end, questions from previous ECM surveys (Zerfass et al., 2019, 2017, 2012) have been repeated. Secondly, regional and national differences are revealed by breaking down the results to 22 key countries. Thirdly, a selection of current challenges in the field are empirically tested. The ECM 2020 explores cybersecurity (Schatz et al., 2017) and how communicators and communication units are affected and involved in dealing with it – a topic that has risen in importance due to the massive expansion of remote work in times of the COVID-19 pandemic.

Another area of investigation is communication ethics. The study identifies the frequency of moral challenges and approaches of coping with them generally (Bivins, 2018; Cheney et al., 2011; Parsons, 2016), as well as ethical aspects of digital communication practices specifically (Barbu, 2013; DiStasio & Bortree, 2014). Additional issues explored are the role of women in communications with a specific look on the glass ceiling hindering female practitioners to reach top positions (Dowling, 2017; Topić et al., 2020) and competency development for communicators (Moreno et al., 2017; Tench & Moreno, 2015). Fourthly, statistical methods are used to identify high performing communication departments in the sample (Tench et al., 2017b; Verčič & Zerfass, 2016), and there define which aspects make a difference. Overall, the research design supports a broad range of evaluations which expand the body of knowledge.

Methodology and demographics



Methodology and demographics

The online questionnaire of the European Communication Monitor 2020 consisted of 36 questions. Five of these questions were only presented to professionals working in communication departments. 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 58 communication professionals in 17 European countries. Amendments were made where appropriate and the final questionnaire was activated for five weeks in January/February 2020. More than 11,000 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.

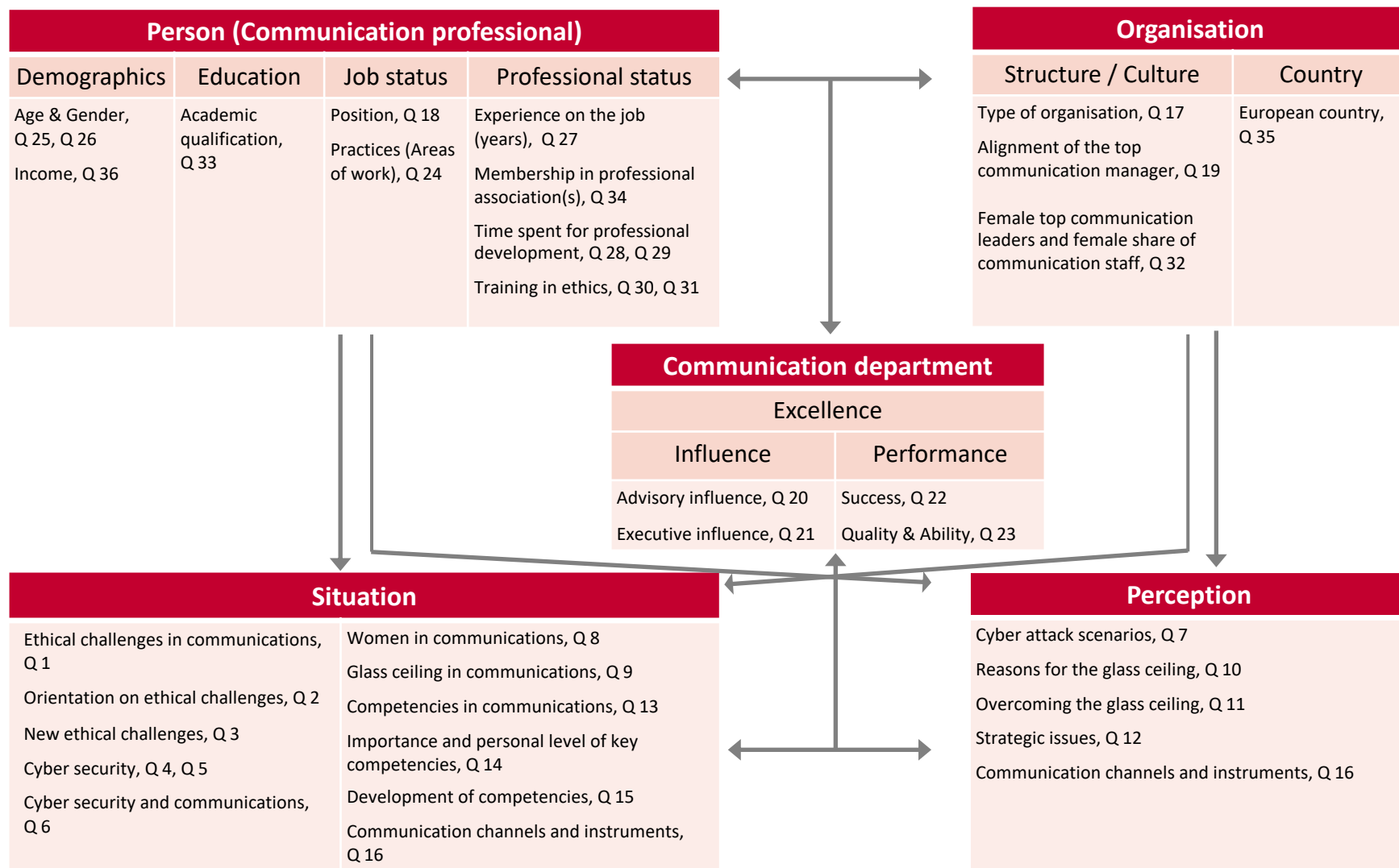
In total 3,999 respondents started the survey and 2,498 of them completed it. Answers from participants who could not clearly be identified as part of the population were deleted from the dataset. This strict selection of respondents is a distinct feature of the ECM and sets it apart from many studies which are based 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 2,324 fully completed replies 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, Kendall rank correlation or Mann-Whitney U Test. 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 and a long tenure in the field. The average age is 43.3 years. Two out of three respondents are communication leaders: 35.7 per cent hold a top hierarchical position as head of communication in an organisation or as chief executive officer of a communication consultancy; 28.1 per cent are unit leaders or in charge of a single discipline in a communication department. 68.6 per cent of the professionals interviewed have more than ten years of experience in communication management. 60.6 per cent of all respondents are female and a vast majority (95.7 per cent) 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 (joint stock companies, 16.9 per cent; private companies, 22.0 per cent; government-owned, public sector, political organisations, 18.7 per cent; non-profit organisations, associations, 10.1 per cent), while 32.3 per cent are communication consultants working freelance or for agencies. Communication professionals from 44 European countries participated in the survey. Detailed insights were calculated for 22 key markets. Most respondents (30.6 per cent) are based in Southern Europe (countries like Italy, Spain, Portugal, Serbia), followed by Western Europe (29.9 per cent; countries like Germany, Austria, Netherlands, Belgium), Northern Europe (20.1 per cent; countries like United Kingdom, Norway, Sweden, Finland), and Eastern Europe (19.4 per cent; countries like Romania, Poland, Russia, the Czech Republic).

Research framework and questions



Demographic background of participants

Position

Head of communication, Agency CEO	35.7%
Unit leader, Team leader	28.1%
Team member, Consultant	29.7%
Other	6.5%

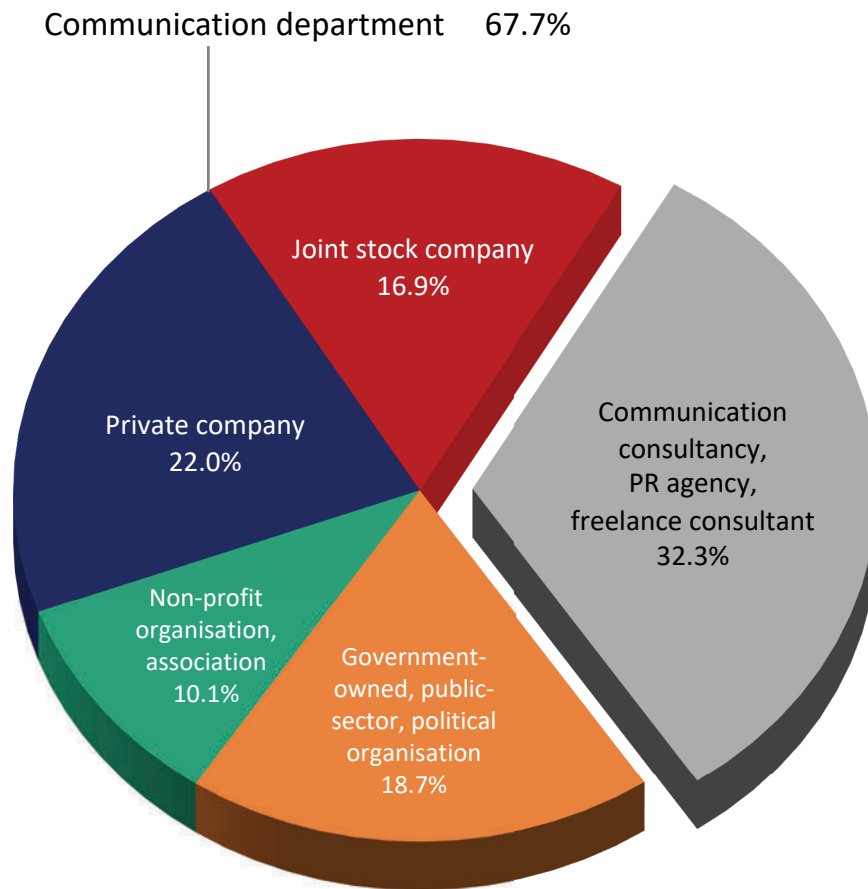
Job experience

More than 10 years	68.6%
6 to 10 years	15.6%
Up to 5 years	15.8%

Alignment of the communication function

Strongly aligned communication department	28.5%
Aligned communication department	57.4%
Weakly aligned communication department	14.1%

Organisation



Personal background of respondents

Gender / Age

	Overall	Head of communication, Agency CEO	Unit leader, Team leader	Team member, Consultant
Female	60.6%	51.4%	60.9%	69.7%
Male	39.4%	48.6%	39.1%	30.3%
Age (on average)	43.3 years	47.4 years	42.9 years	39.3 years

Membership in a professional association

European Association of Communication Directors (EACD)	9.7%
Other international communication association	14.5%
National PR or communication association	51.8%

Highest academic educational qualification

Doctorate (Ph.D., Dr.)	8.3%
Master (M.A., M.Sc., Mag., M.B.A.), Diploma	63.3%
Bachelor (B.A., B.Sc.)	24.1%
No academic degree	4.3%

Countries and regions represented in the study

Respondents are based in 44 European countries and four regions

Western Europe
29.9% (n = 695)



Northern Europe
20.1% (n = 467)



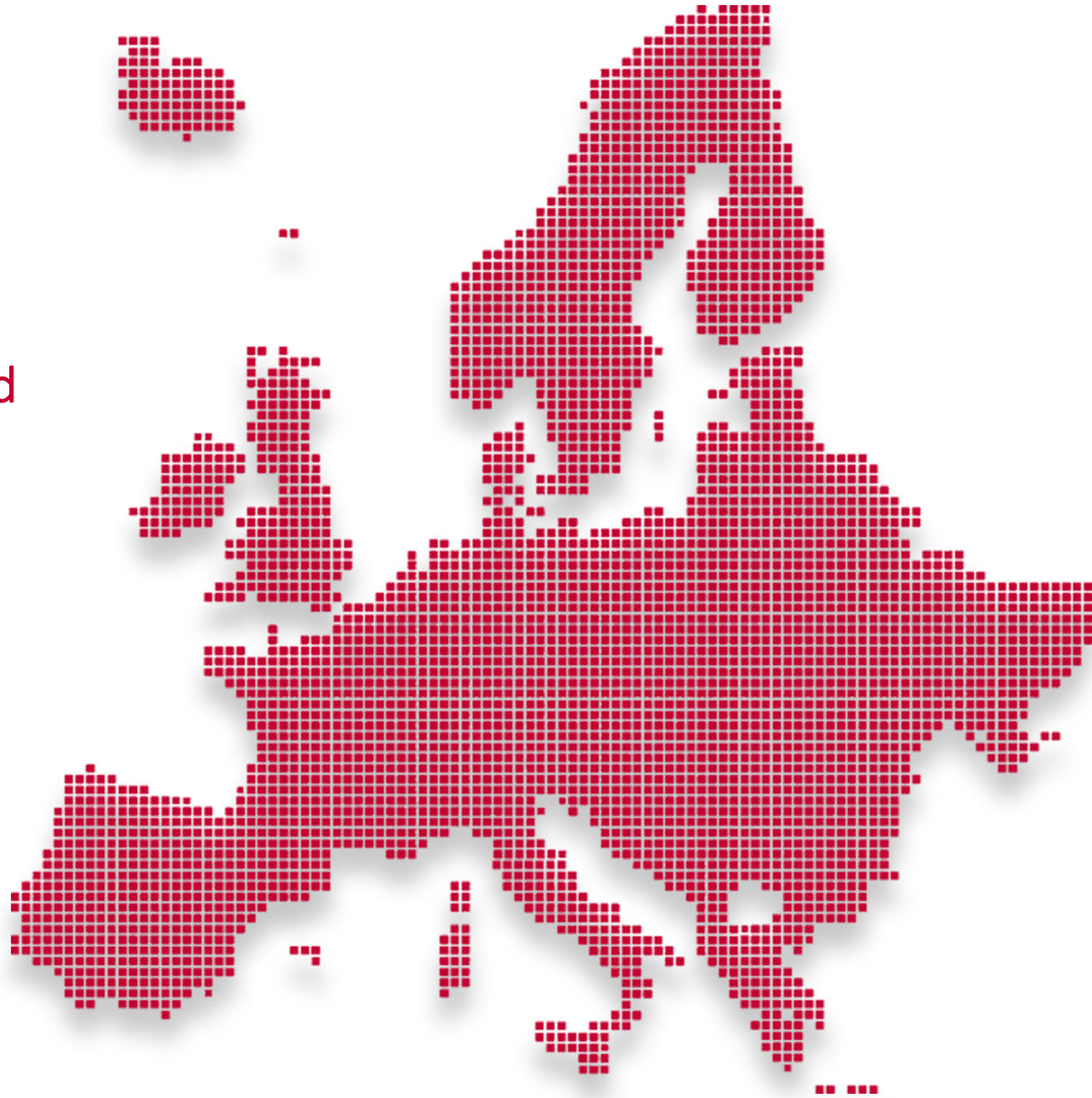
Southern Europe
30.6% (n = 711)



Eastern Europe
19.4% (n = 451)



Ethical challenges and resources for the communications profession



Ethical challenges and resources for the communications profession

Today's globalised and complex world is interconnected in many ways. This makes it difficult to assess the consequences of individual actions. Many activities might be legally acceptable, but challenging from a moral point of view. At first sight, such problems faced by communication practitioners look less relevant than those in other professions, e. g. of medical staff facing too many patients and insufficient resources during a pandemic. But a closer look reveals that strategic communicators influence public opinion building and the construction of reality in mediatised societies to a huge extent (Hepp, 2020; Knoblauch, 2020). Fighting or supporting conspiracy theories and fake news, intentionally or randomly, impact global health issues as well as the economic development of communities and individual organisations. This poses severe ethical challenges to communication professionals, which are explored in this study.

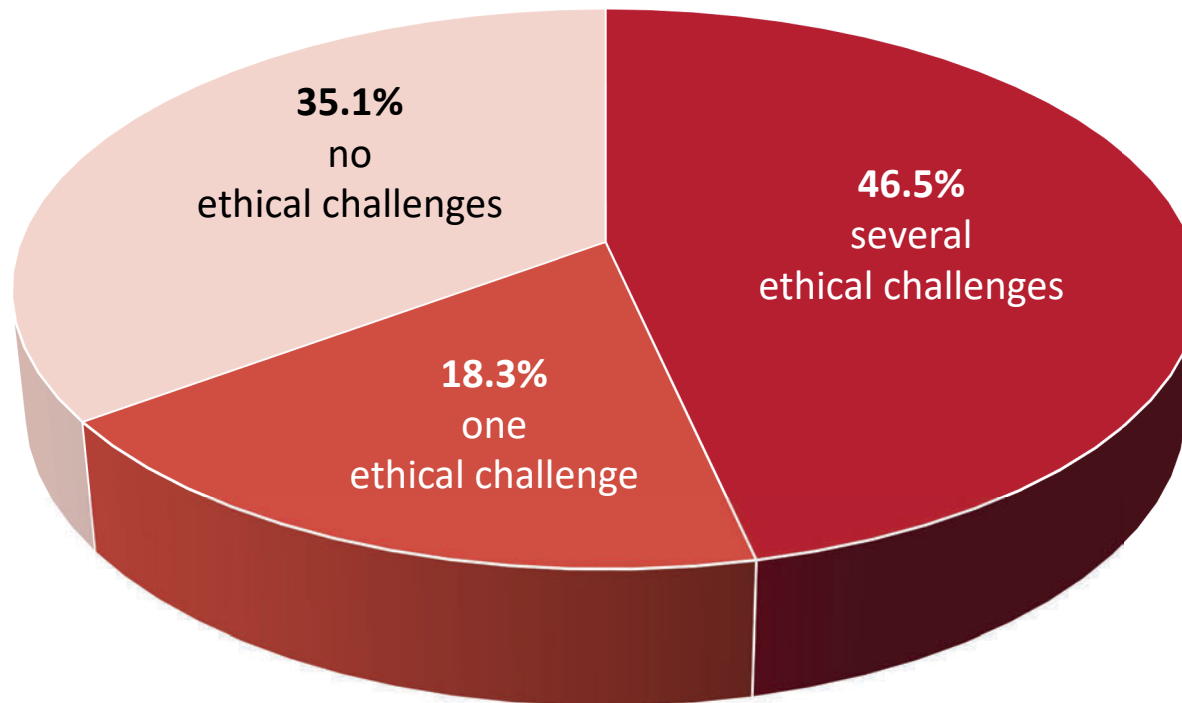
Almost every second practitioner (46.5 per cent) has experienced several ethical challenges in their day to day work during the last 12 months. A smaller portion reports about one issue (18.3 per cent), while 35.1 per cent haven't had any issues during that period. The frequency of moral hazards and the overall share of affected communicators has grown within the last years, as shown by a comparison with previous data (Zerfass et al., 2012). Ethical challenges differ significantly across Europe: The highest portion of practitioners without any ethical issue can be found in the Nordic countries, Belgium and Germany, whereas several ethical challenges were most often reported from Croatia, Portugal, and Poland. Moral issues imply some way of ethical decision-making (Bivins, 2018; Cheney et al., 2011; Farmer, 2018). Practitioners can rely on different resources when weighting alternatives and taking decisions. National and international associations provide codes of ethics, e. g. the Code of Athens, on the macro level of the profession. They are often taught in the classroom, but less relevant in the practice – 57.5 per cent of respondents state they were important for them when dealing with ethical issues. Three out of four (76.5 per cent) rely on ethical guidelines issued by their own organisation (meso level) and a clear majority (86.1 per cent) used personal values and beliefs, for example those based on family tradition, education or religion (micro level). This indicates that current guidelines in the communications field are either not widely known or not focused enough to support practitioners. Again it is interesting to see huge differences between countries regarding the use of professional codes with Finland, Portugal, Croatia and Serbia taking the lead.

Digital technologies offer many opportunities for strategic communications (Freberg, 2017), for example by using social bots (Wiesenberg & Tench, 2020), big data analytics (Wiesenberg et al., 2017), sponsored content (Zerfass et al., 2019), and social media influencers (Enke & Borchers, 2019). Such practices are less institutionalised and rarely covered by codes of conduct compared to traditional media relations or advertising. This study shows that most communication practitioners are challenged by those practices: two out of three (67.6 per cent) state that using bots to generate feedback and followers on social media is extremely or very challenging in terms of ethics. The majority thinks the same for all other practices mentioned above. Less problems are identified when it comes to profiling and targeting audiences and editing entries in public wikis like Wikipedia.

A potential solution for moral dilemmas in the profession are training opportunities in communication ethics. But 40.4 per cent of communication practitioners in Europe have never participated in ethics training. For those who did so, it was mainly during their studies and more than three years ago. The findings indicate that more focused, up-to-date, and regular reflections about ethics are needed.

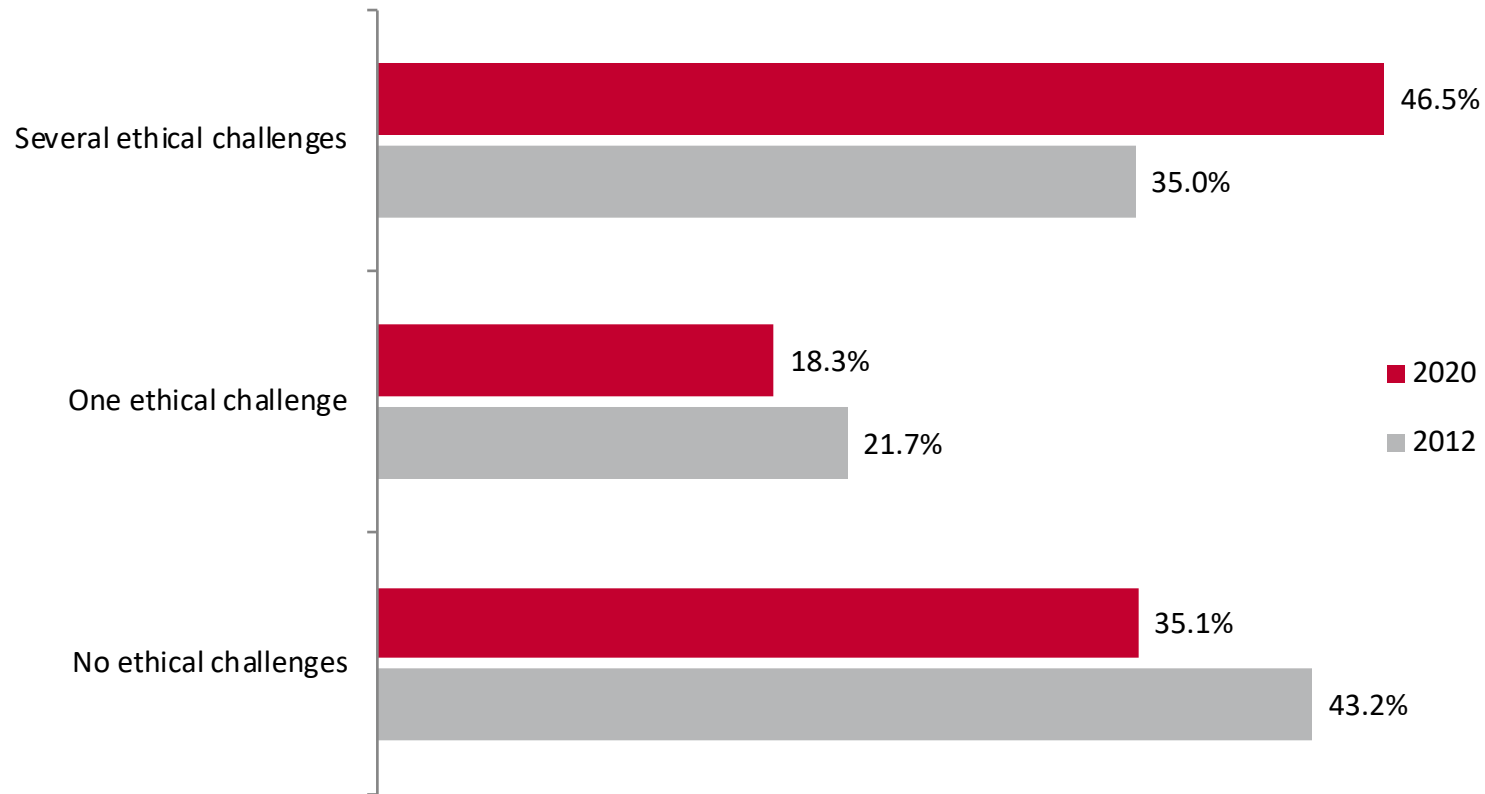
Two out of three communication professionals in Europe encounter ethical challenges in their daily work

Number of ethical challenges encountered in day to day work in the past year



Relevance of ethical challenges has grown compared with past years:
Ethical issues are more common and there are fewer unaffected communicators

Number of ethical challenges encountered by communication professionals in day to day work in the past year



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,143 communication professionals. Q 1: Like anyone else, communication professionals sometimes face situations where particular activities might be legally acceptable, but challenging from a moral point of view. In your day to day work during the past 12 months, have you experienced ethical challenges? No / Yes, once / Yes, several times / Don't know or don't remember. Data for 2012 based on surveying n = 2,137 communication professionals with slightly different question wording; see Zerfass et al. 2012, p. 20.

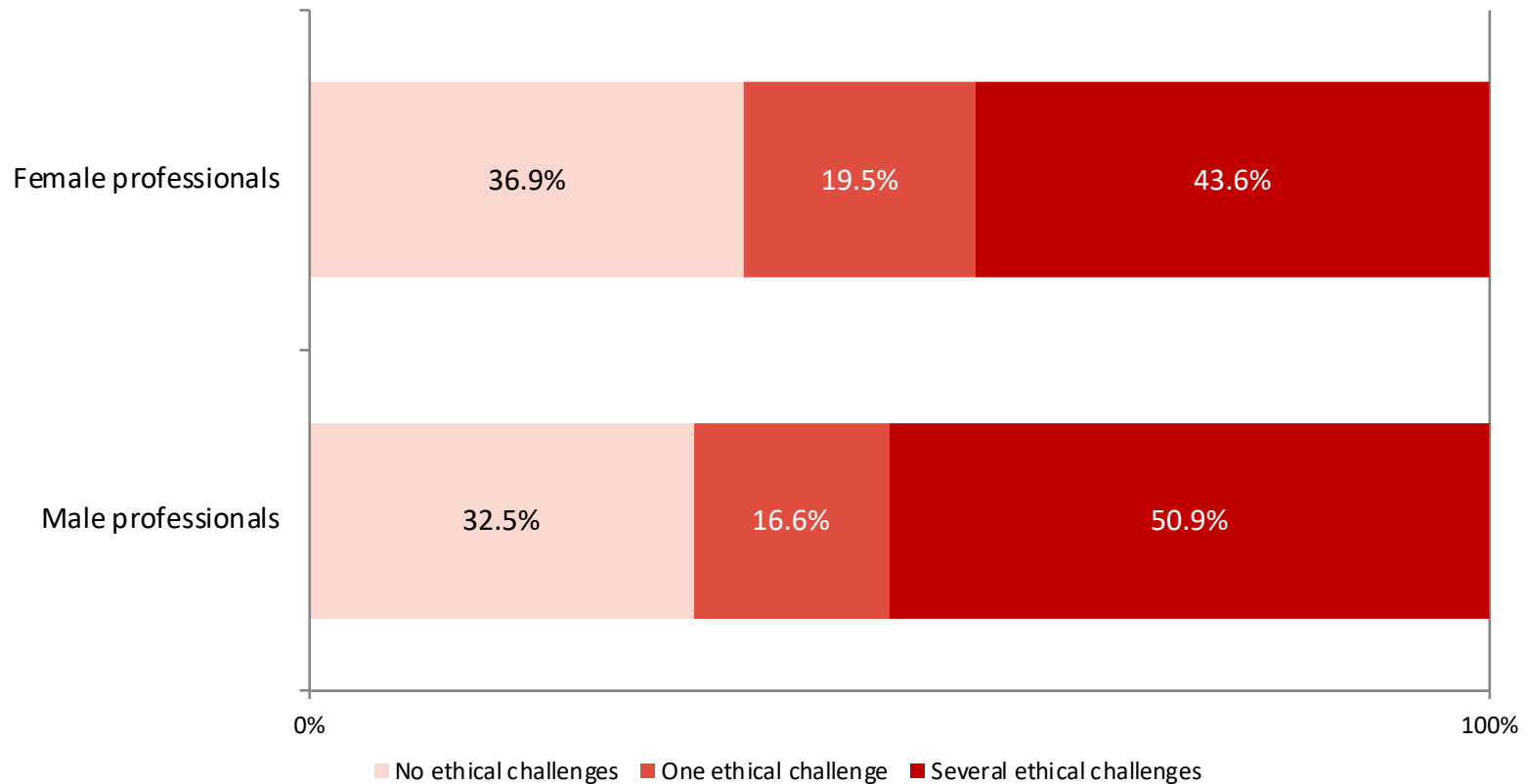
Ethical challenges in communications differ significantly across Europe

	No ethical challenges	One ethical challenge	Several ethical challenges		No ethical challenges	One ethical challenge	Several ethical challenges
Germany	44.4%	15.4%	40.1%	Spain	38.3%	17.0%	44.7%
Austria	36.8%	22.8%	40.4%	Portugal	20.2%	19.0%	60.7%
Switzerland	31.5%	25.8%	42.7%	Italy	39.8%	19.5%	40.7%
France	37.1%	28.6%	34.3%	Greece	30.0%	17.5%	52.5%
Belgium	44.9%	19.4%	35.7%	Slovenia	35.8%	17.9%	46.3%
Netherlands	38.4%	15.2%	46.4%	Croatia	28.0%	9.8%	62.2%
United Kingdom	38.5%	19.8%	41.8%	Serbia	34.9%	9.6%	55.4%
Denmark	51.7%	17.2%	31.0%	Poland	18.6%	22.0%	59.3%
Sweden	44.9%	17.9%	37.2%	Czech Republic	23.9%	19.6%	56.5%
Norway	41.7%	13.1%	45.2%	Romania	26.5%	28.9%	44.6%
Finland	40.8%	19.7%	39.4%	Russia	35.6%	20.3%	44.1%

www.communicationmonitor.eu / Zerfass et al. 2020 / n = 1,888 communication professionals from 22 countries. Q 1: Like anyone else, communication professionals sometimes face situations where particular activities might be legally acceptable, but challenging from a moral point of view. In your day to day work during the past 12 months, have you experienced ethical challenges? No / Yes, once / Yes, several times / Don't know or don't remember. Highly significant differences between countries (chi-square test, $p \leq 0.01$).

Male communication practitioners report significantly more ethical challenges than their female colleagues

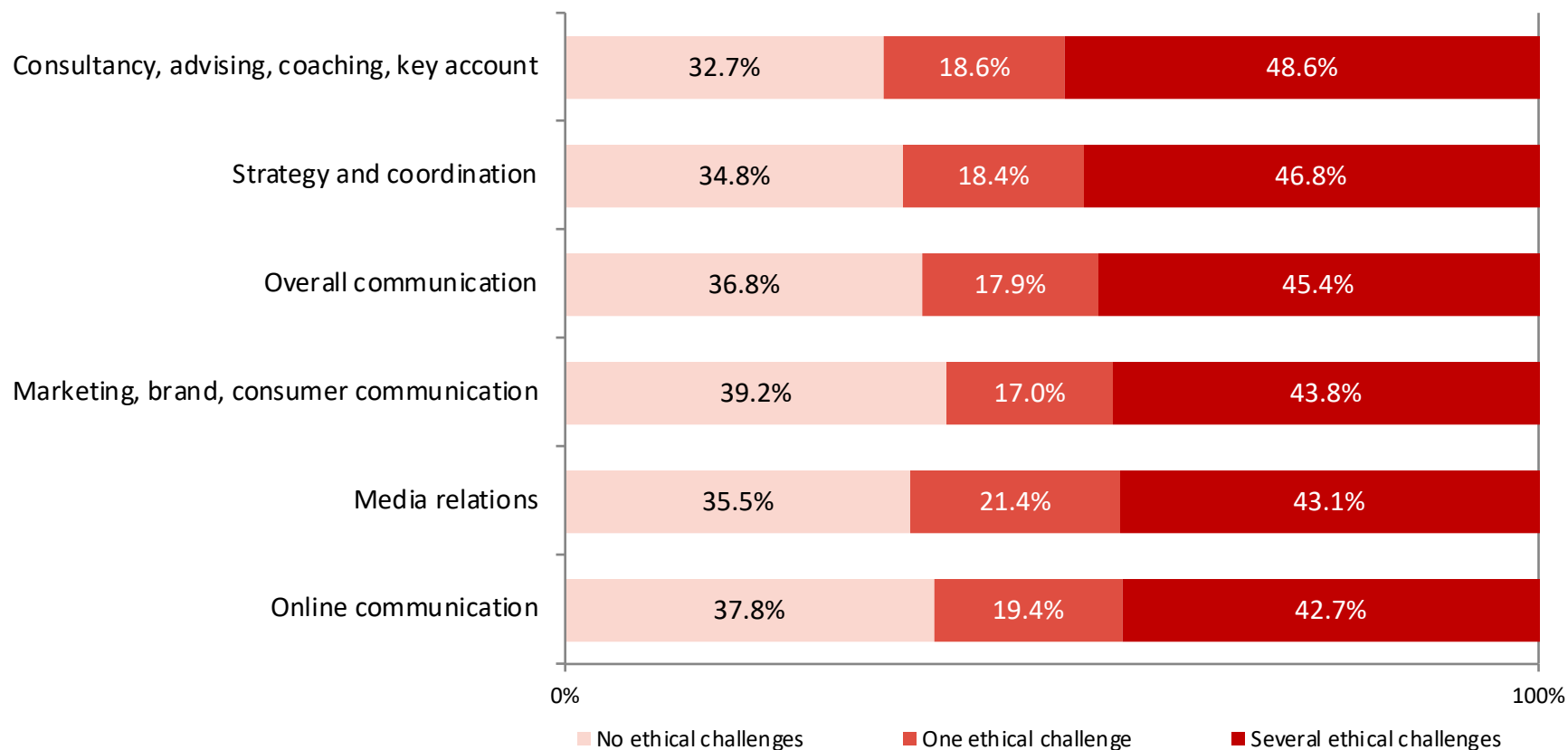
Number of ethical challenges encountered in day to day work in the past year



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,139 communication professionals. Q 1: Like anyone else, communication professionals sometimes face situations where particular activities might be legally acceptable, but challenging from a moral point of view. In your day to day work during the past 12 months, have you experienced ethical challenges? No / Yes, once / Yes, several times / Don't know or don't remember. Highly significant differences between women and men (Mann-Whitney U Test, $p \leq 0.01$).

Different communication roles can be more or less demanding in moral terms – but overall the amount of challenges are quite similar

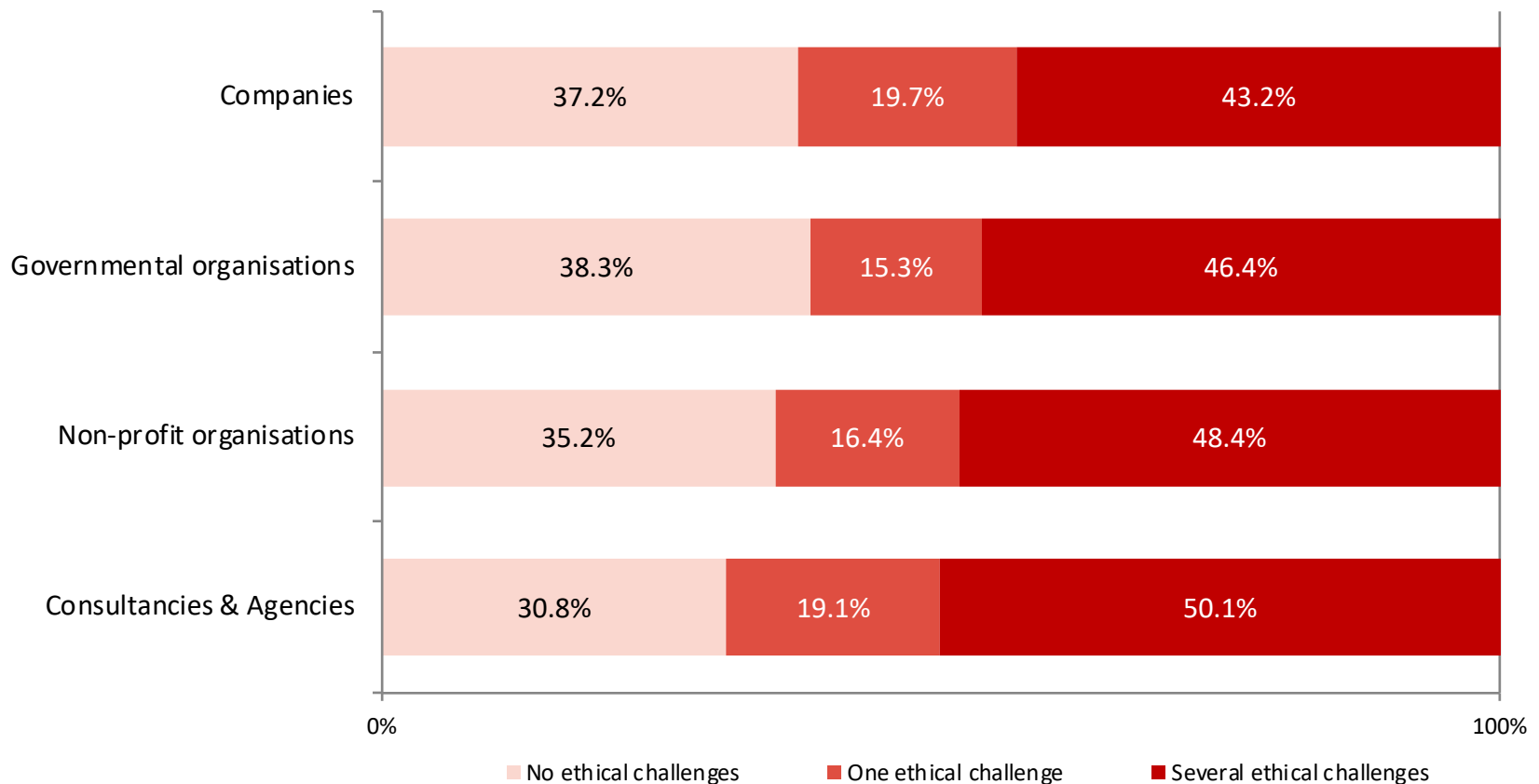
Number of ethical challenges encountered by communication professionals in day to day work in the past year



www.communicationmonitor.eu / Zerfass et al. 2020 / n ≥ 505 communication professionals. Q 1: Like anyone else, communication professionals sometimes face situations where particular activities might be legally acceptable, but challenging from a moral point of view. In your day to day work during the past 12 months, have you experienced ethical challenges? No / Yes, once / Yes, several times / Don't know or don't remember. Q 24: What are the dominant areas of your work? Please pick 3!

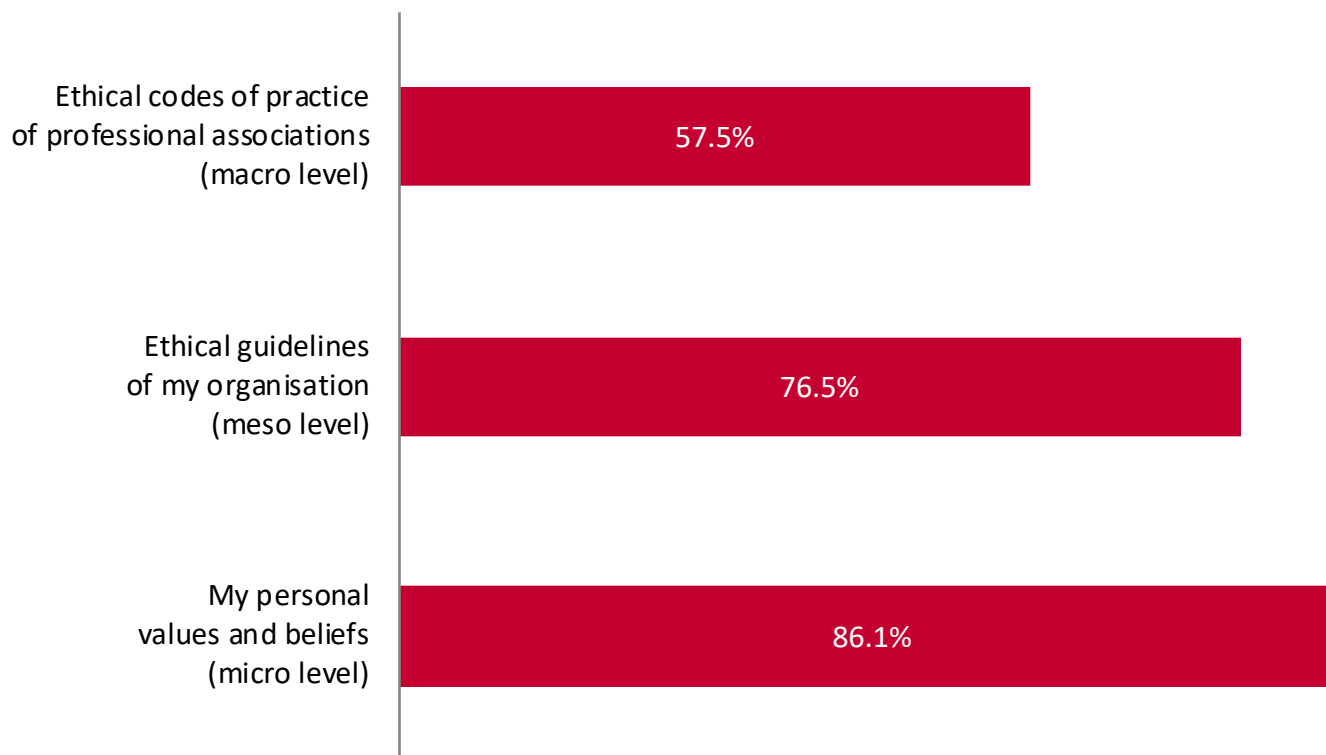
Ethical challenges are most common in consultancies and agencies, compared to other types of organisations

Number of ethical challenges encountered by communication professionals in day to day work in the past year



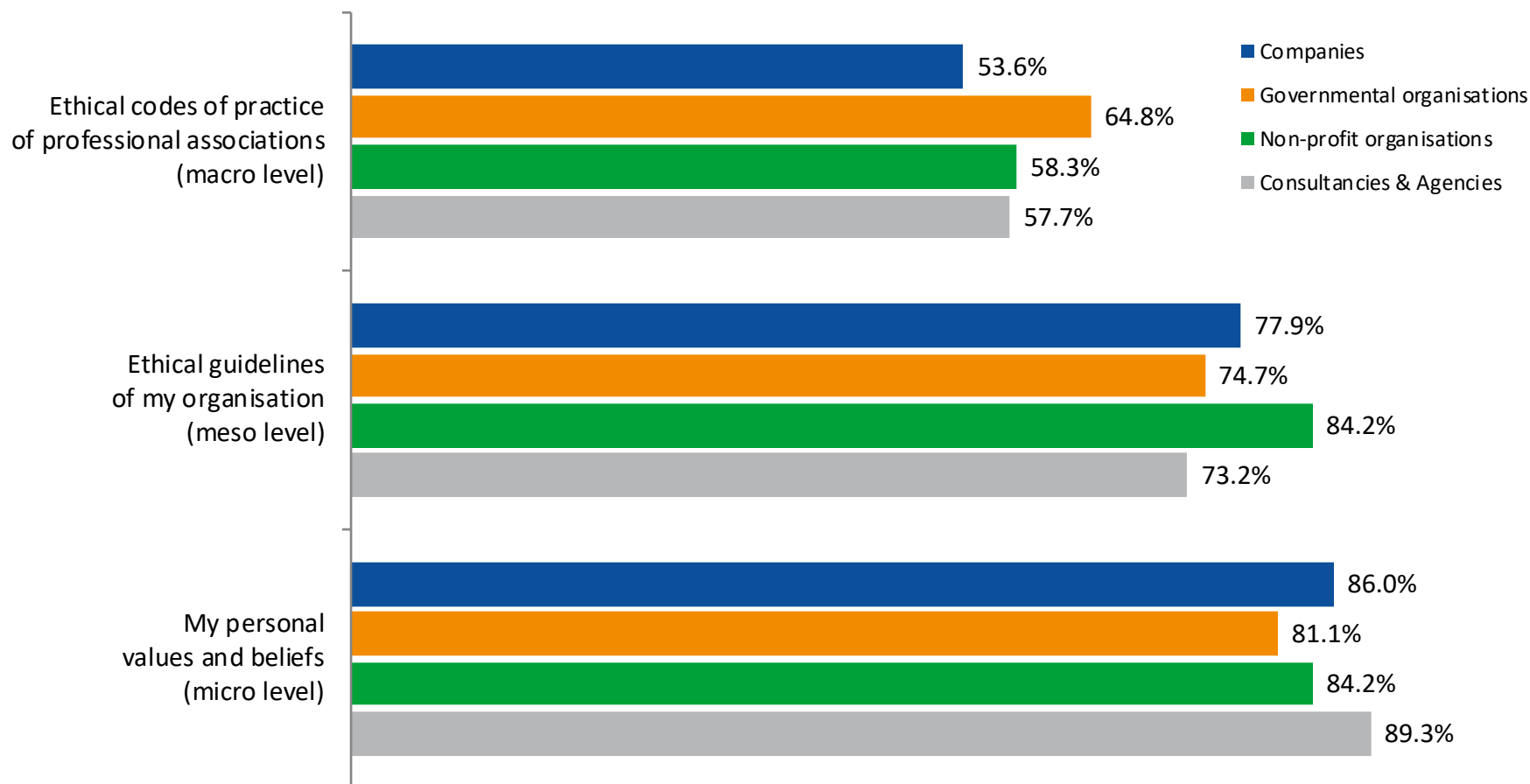
Dealing with ethical challenges: Most communication practitioners rely on personal values; codes promoted by professional associations are least important

Resources used by communication practitioners when dealing with ethical challenges



Practitioners in the public sector use general codes of ethics to a larger extent, while organisational guidelines are most acknowledged in non-profit organisations

Resources used by communication practitioners when dealing with ethical challenges

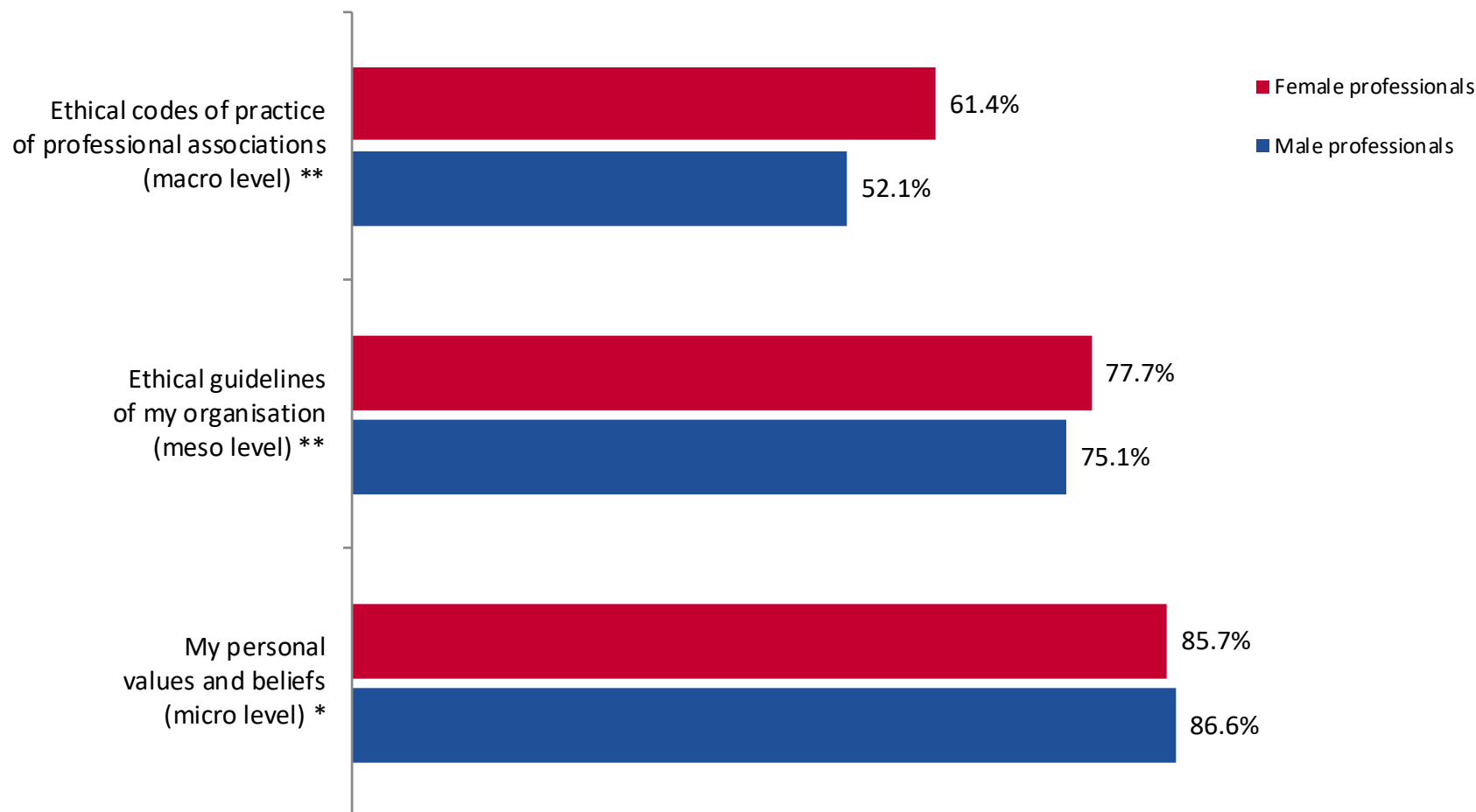


Resources used for dealing with ethical challenges across Europe

	Ethical codes of practice of professional associations (macro level)	Ethical guidelines of my organisation (meso level)	My personal values and beliefs (micro level)		Ethical codes of practice of professional associations (macro level)	Ethical guidelines of my organisation (meso level)	My personal values and beliefs (micro level)
Germany	44.3%	84.8%	89.8%	Spain	51.7%	79.1%	86.2%
Austria	43.0%	70.2%	87.2%	Portugal	73.1%	89.4%	89.6%
Switzerland	42.6%	79.5%	86.9%	Italy	63.5%	85.2%	86.5%
France	50.0%	61.5%	68.2%	Greece	64.3%	75.0%	75.0%
Belgium	50.9%	82.9%	90.6%	Slovenia	60.5%	72.4%	88.4%
Netherlands	30.4%	69.1%	88.4%	Croatia	75.9%	83.3%	89.7%
United Kingdom	46.4%	73.0%	85.7%	Serbia	72.2%	76.9%	92.6%
Denmark	46.2%	90.0%	84.6%	Poland	60.4%	74.2%	93.8%
Sweden	62.8%	69.4%	60.5%	Czech Republic	51.4%	68.2%	100.0%
Norway	66.7%	78.9%	83.3%	Romania	68.3%	70.6%	79.2%
Finland	70.7%	77.4%	82.9%	Russia	50.0%	62.1%	78.9%

Female communicators rely significantly more often on professional codes of ethics and organisational guidelines

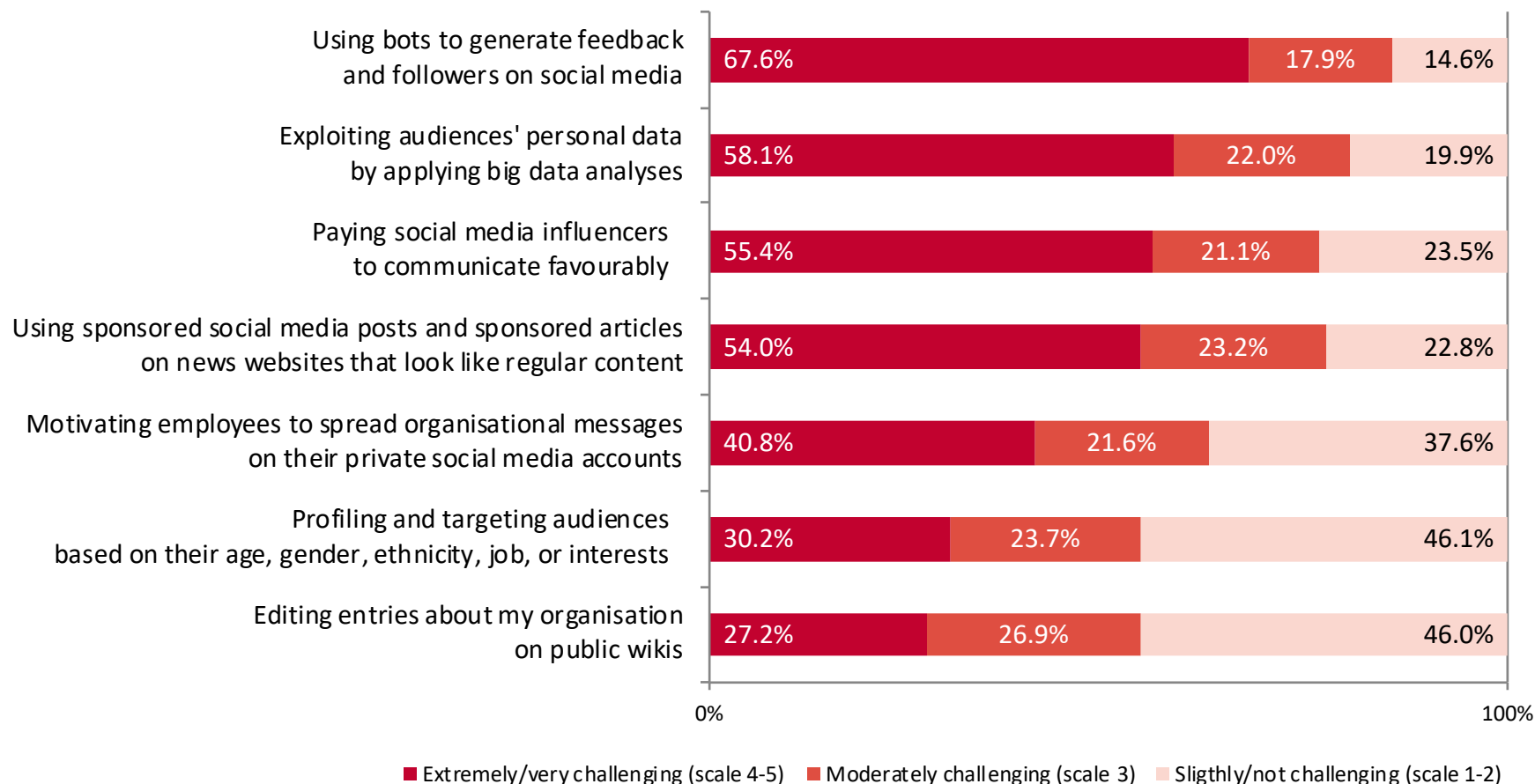
Resources used for dealing with ethical challenges



www.communicationmonitor.eu / Zerfass et al. 2020 / $n \geq 1,021$ communication professionals. Q2: How important were the following resources to you when dealing with ethical challenges? Scale 1 (Not important) – 5 (Very important). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, $p \leq 0.01$). * Significant differences (chi-square test, $p \leq 0.05$).

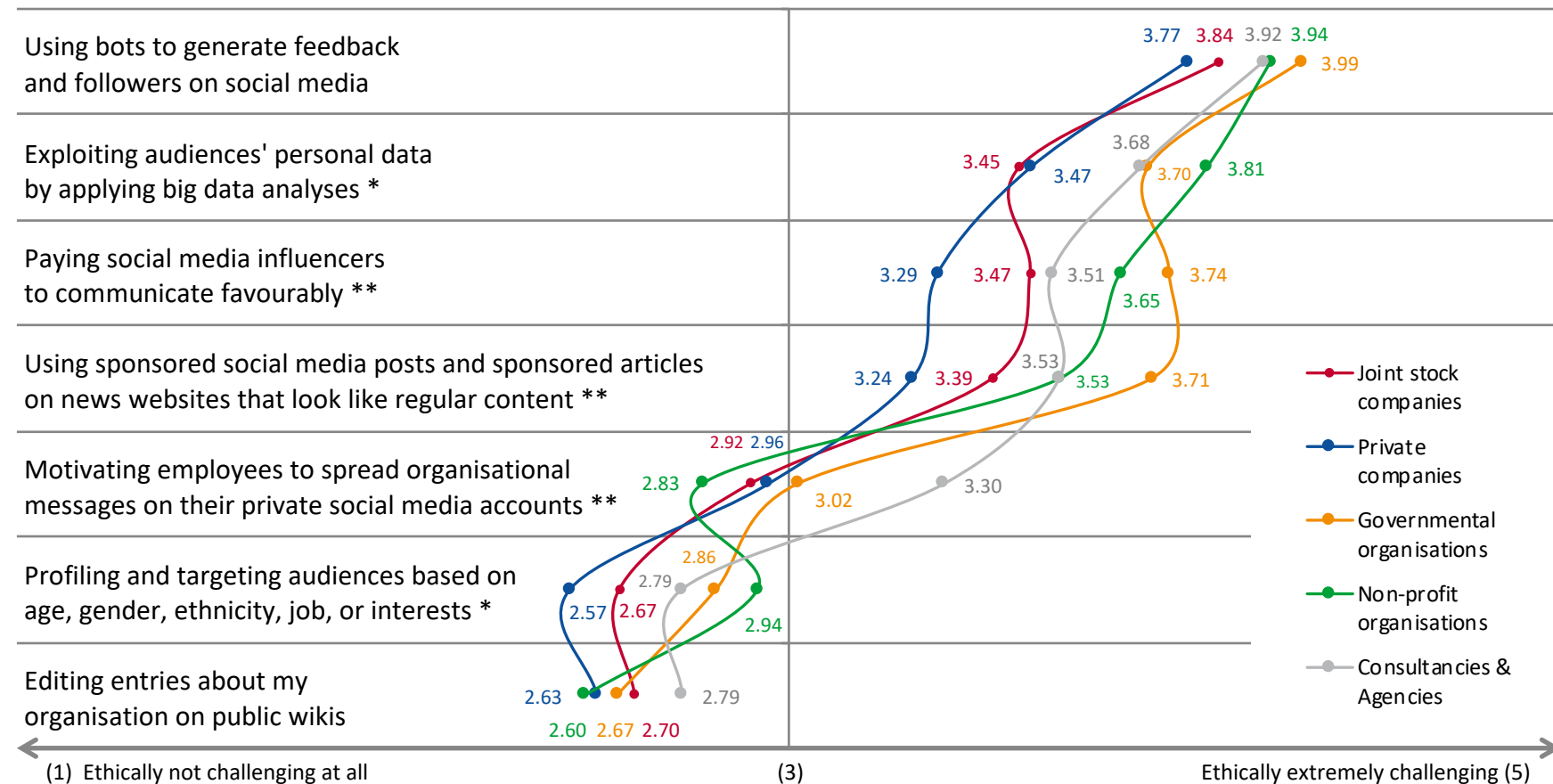
Ethical concerns over communication practices on social media: Four out of five practitioners are worried about using bots and big data analyses

Ethical challenges of current communication practices



Communicators working in governmental organisations and non-profits are more troubled about paying social media influencers and publishing sponsored posts

Ethical challenges of current communication practices

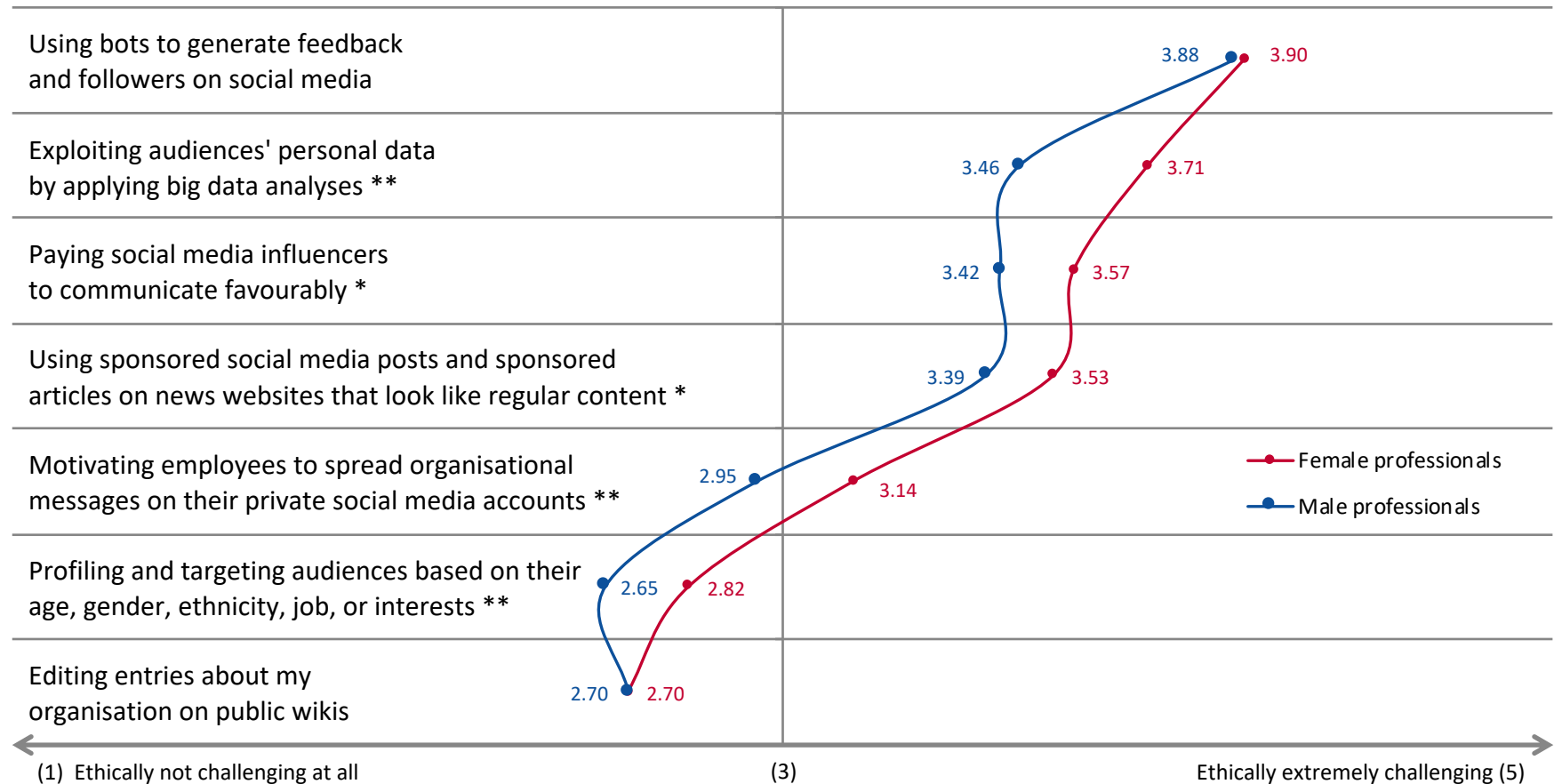


www.communicationmonitor.eu / Zerfass et al. 2020 / n ≥ 2,121 communication professionals. Q3: Strategic communication and public relations are constantly evolving and introducing new ways of communicating with stakeholders. How challenging are the following practices in your opinion in terms of ethics? Scale 1 (Ethically not challenging at all) – 5 (Ethically extremely challenging). Mean values. ** Highly significant differences (ANOVA, $p \leq 0.01$).

* Significant differences (ANOVA, $p \leq 0.05$).

Women working in the field have stronger ethical concerns on almost every addressed social media practice in professional communications

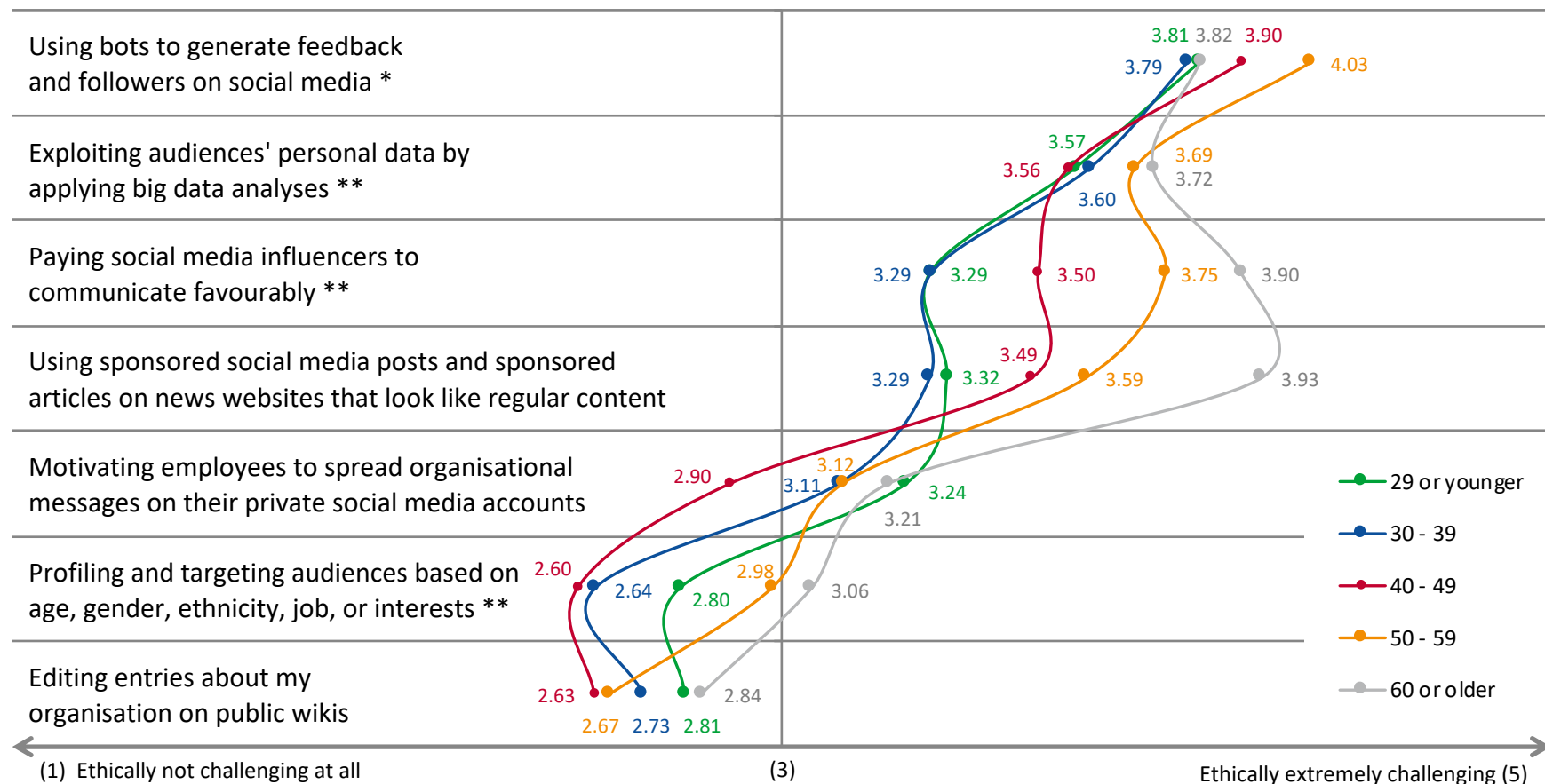
Ethical challenges of current communication practices



www.communicationmonitor.eu / Zerfass et al. 2020 / n ≥ 2,117 communication professionals. Q3: Strategic communication and public relations are constantly evolving and introducing new ways of communicating with stakeholders. How challenging are the following practices in your opinion in terms of ethics? Scale 1 (Ethically not challenging at all) – 5 (Ethically extremely challenging). Mean values. * Highly significant differences (Independent sample T-Test, $p \leq 0.01$). * Significant differences (Independent sample T-Test, $p \leq 0.05$).

Younger communication professionals estimate less moral hazards when paying for social media influencers or sponsored content

Ethical challenges of current communication practices



www.communicationmonitor.eu / Zerfass et al. 2020 / $n \geq 2,121$ communication professionals. Q3: Strategic communication and public relations are constantly evolving and introducing new ways of communicating with stakeholders. How challenging are the following practices in your opinion in terms of ethics? Scale 1 (Ethically not challenging at all) – 5 (Ethically extremely challenging). Mean values. * Highly significant differences (Pearson correlation, $p \leq 0.01$). * Significant differences (Pearson correlation, $p \leq 0.05$).

Deficiencies in developing ethical competences: The majority of communication professionals in Europe has never participated in any formal training or classes

Have you ever participated in training on communication ethics?



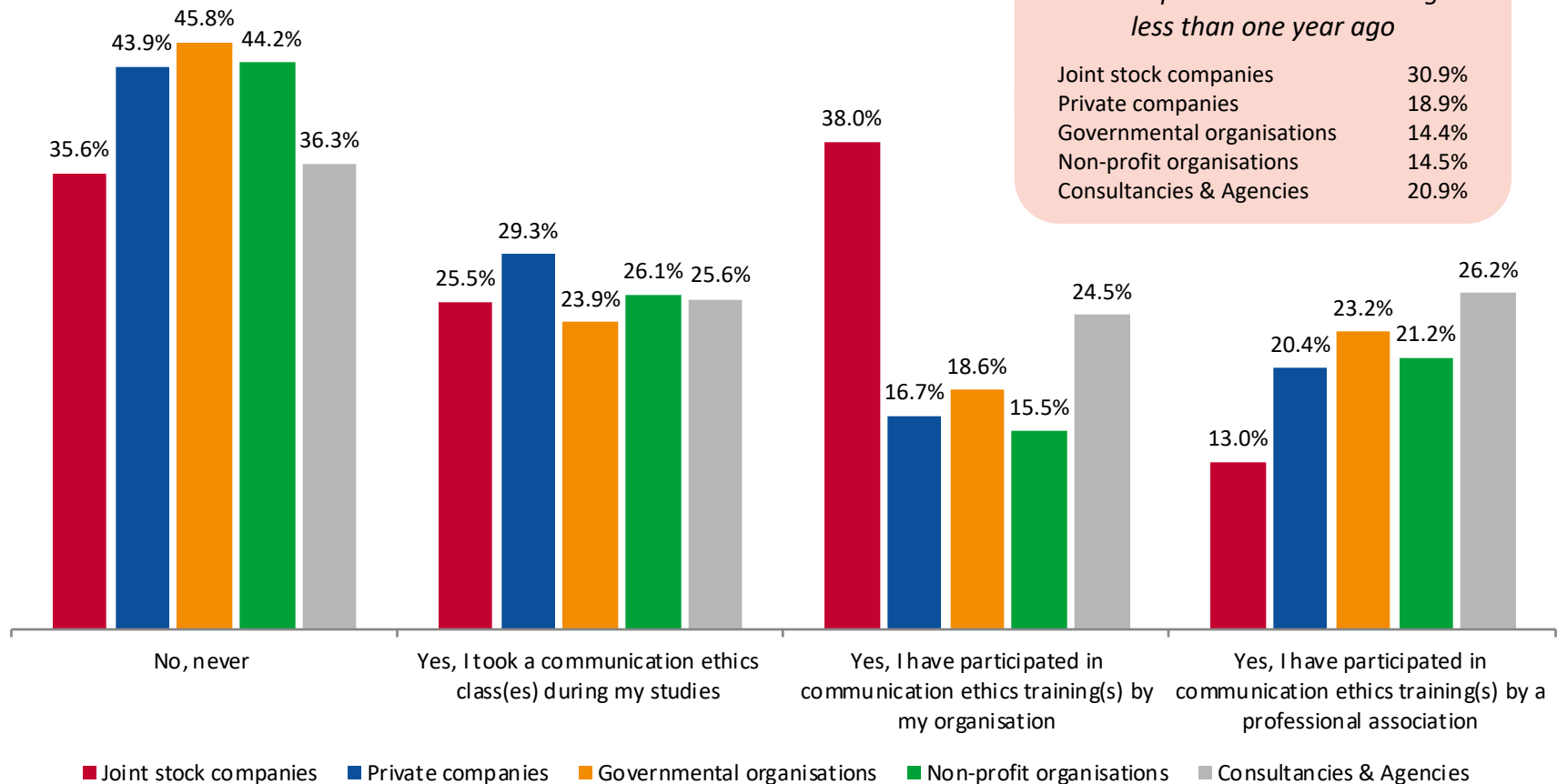
When was the last time you participated in communication ethics training?

Less than 1 year ago	20.3%
1 to 3 years ago	16.9%
More than 3 years ago	24.1%

www.communicationmonitor.eu / Zerfass et al. 2020 / n ≥ 2,020 communication professionals. Q 30: Have you ever participated in trainings on communication ethics? Yes, I have participated in communication ethics training(s) by a professional association / Yes, I have participated in communication ethics training(s) by my organisation / Yes, I took a communication ethics class(es) during my studies / No, never / Don't know or don't remember. Q 31: When was the last time you participated in communication ethics training? Less than 1 year ago / 1 to 3 years ago / More than 3 years ago / I haven't participated in any communication ethics training so far / Don't know or don't remember.

Attending internal ethics training is most common in listed companies – practitioners working there also enjoy the most up-to-date education

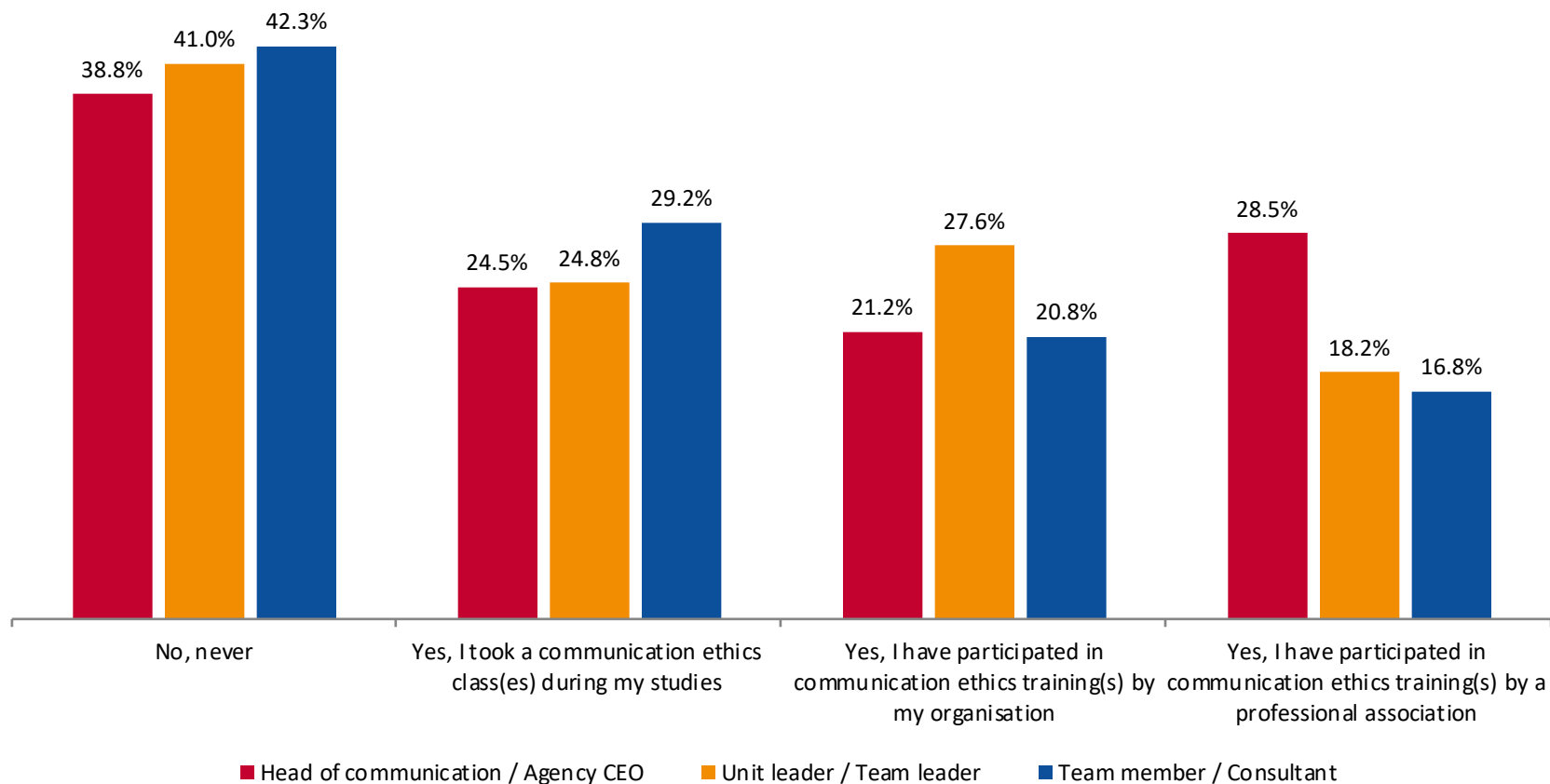
Have you ever participated in training on communication ethics?



www.communicationmonitor.eu / Zerfass et al. 2020 / n ≥ 2,020 communication professionals. Q 30: Have you ever participated in trainings on communication ethics? Yes, I have participated in communication ethics training(s) by a professional association / Yes, I have participated in communication ethics training(s) by my organisation / Yes, I took a communication ethics class(es) during my studies / No, never / Don't know or don't remember. Q 31: When was the last time you participated in communication ethics training? Less than 1 year ago / 1 to 3 years ago / More than 3 years ago / I haven't participated in any communication ethics training so far / Don't know or don't remember.

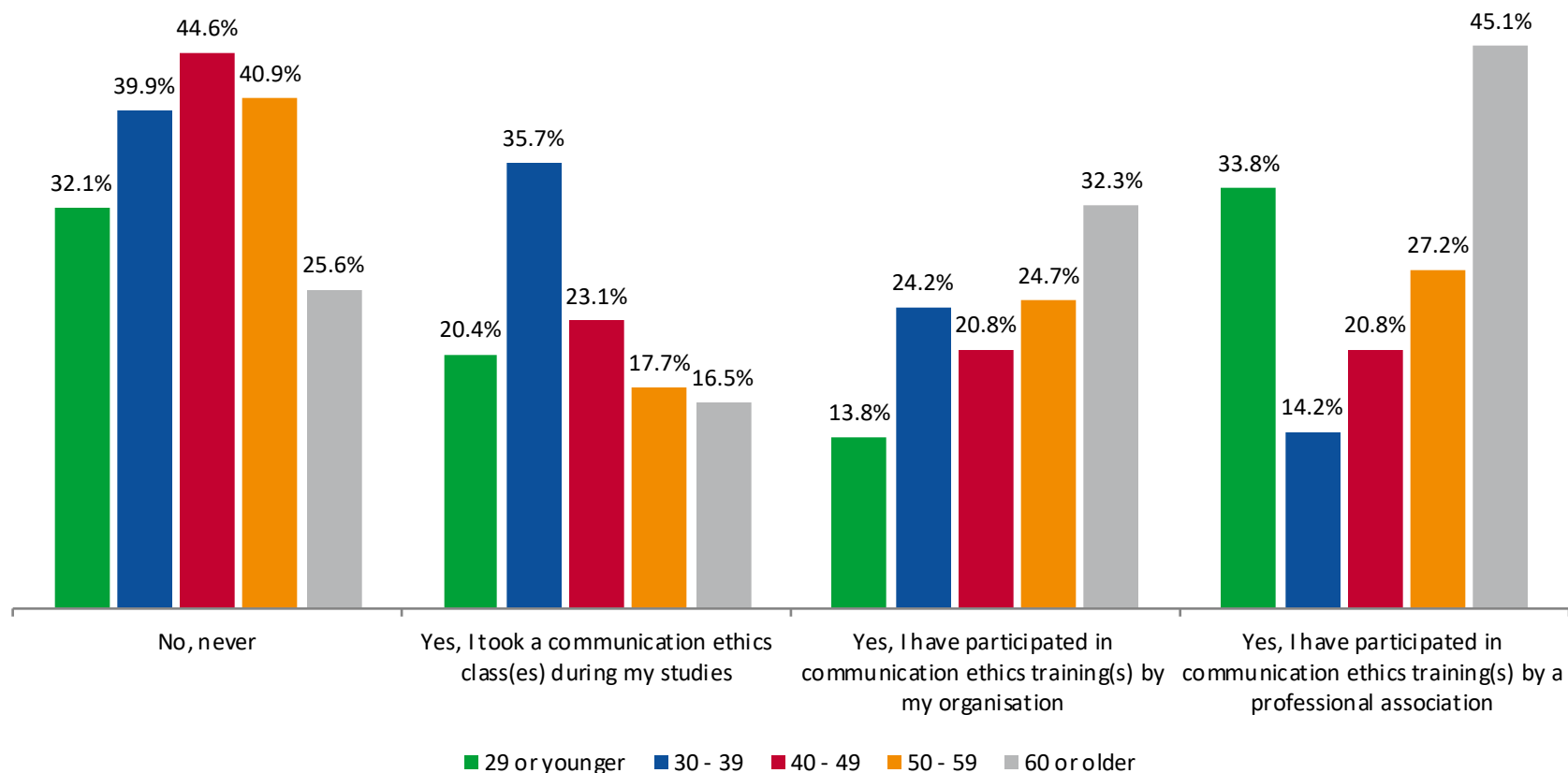
Many more communication leaders have participated in ethics training by professional associations than practitioners on lower levels

Have you ever participated in training on communication ethics?

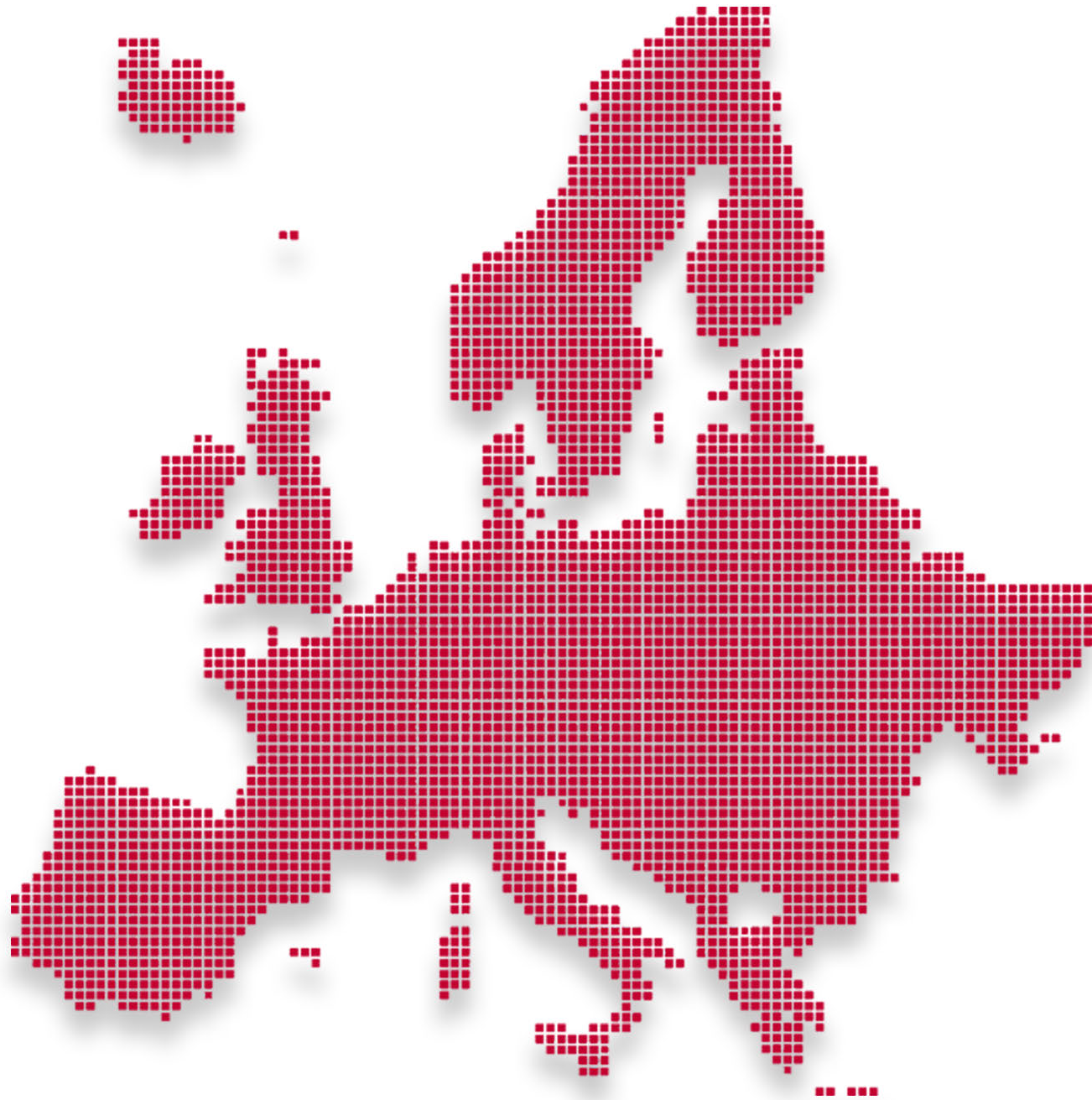


Senior communication professionals (60+) as well as younger colleagues in their 20s are best educated in ethics

Have you ever participated in training on communication ethics?



Cyber security
and communications



Cyber security and communications

We are all becoming more and more reliant on the Internet and digital communication: “The internet and other digital technologies as well as its underlying network and information systems are the backbone of the European Society and the Digital Single Market” (ENISA, 2016, p. 5). This dependency of individuals and organisations is making us all vulnerable to cyber (in)security. Indeed, the World Economic Forum report on global risks revealed that cyber-attacks and data fraud or theft are two of the top five risks CEOs are most likely to face (WEF, 2019). In the global business community cyber security is becoming a common nightmare. As a global insurance group wrote in its Small Business Cyber Risk Report: “Cyber attacks are the new normal” (Hiscox, 2018, p. 3).

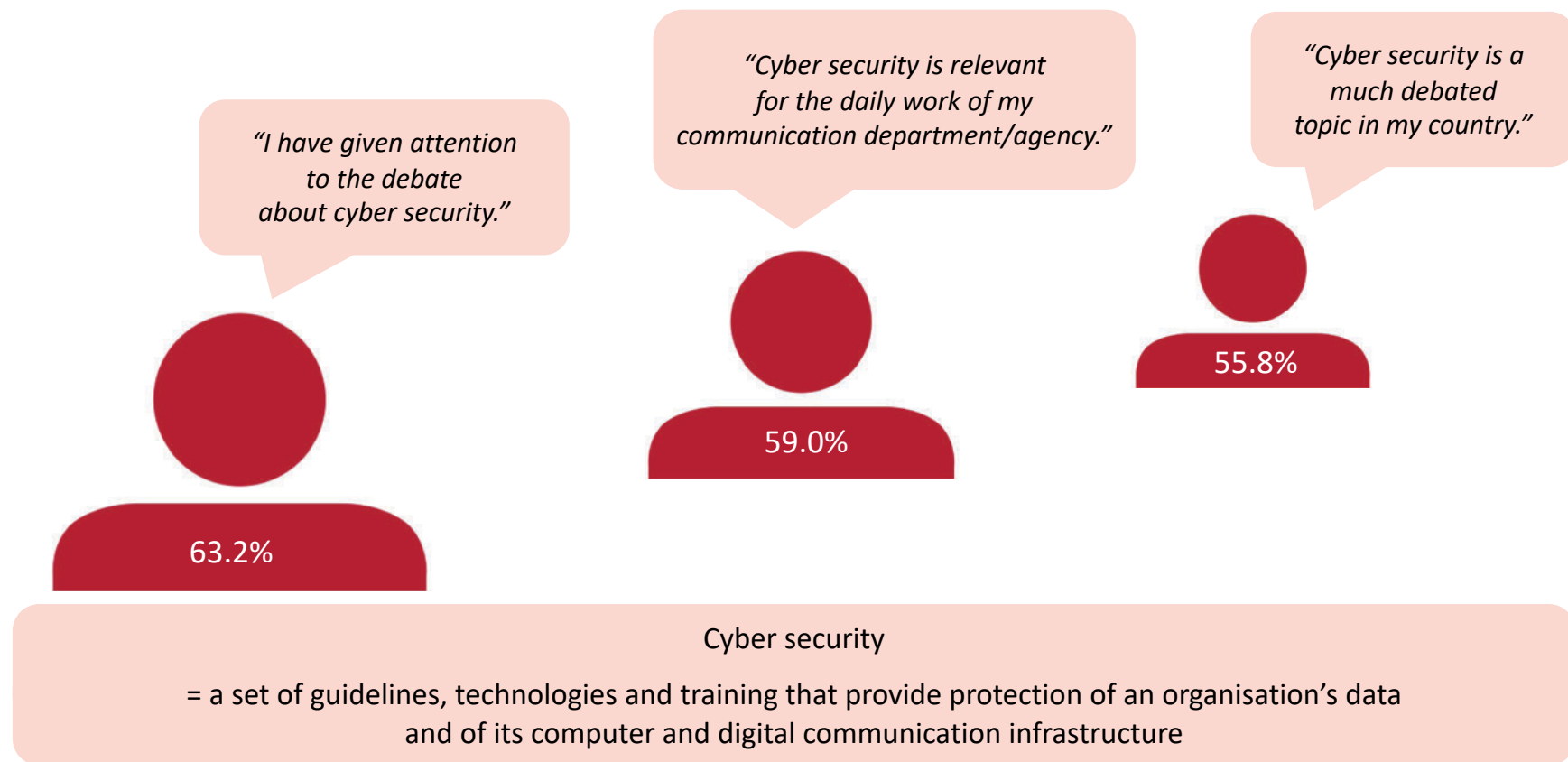
These new realities are recognised by professional communicators in Europe: nearly two thirds of them (63.2 per cent) have given attention to the debate about cyber security, and 59 per cent of them see cyber security as relevant for their daily work in their communication departments or agencies. Practitioners in joint stock companies and governmental organisations express higher awareness for cyber security, while those in private companies, non-profits and consultancies lag behind.

Cyber security – defined as a set of guidelines, technologies and training that provide protection of an organisation’s data and of its computer and digital communication infrastructure (Schatz et al., 2017) – is variously debated across Europe. There is a cyber security divide between Northern and Western Europe on the one side (German professionals agree that cyber security is a much debated topic in their country at 81.9 per cent, in the UK at 80.0 per cent and Denmark at 78.8 per cent) and Southern and Eastern Europe on the other side (with only 20.0 per cent of Croatian professionals agreeing with the same statement, 25.5 per cent in Serbia and 30.2 per cent in Greece). In reality, more than half (54.0 per cent) of communication practitioners in Europe experienced cyber attacks or incidents of data theft in their own organisations – joint stock companies and governmental organisations more often than private companies, non-profits or agencies (with statistically significant differences between countries). More than a quarter (27.4 per cent) of organisations experienced multiple attacks, and nearly a half (46.0 per cent) were not at all exposed to cyber attacks.

A finding by a business consultancy that “training employees to think and act with security in mind is the most underfunded activity in cybersecurity budgets” (Accenture, 2019, p. 8) applies to the communications field as well. Nearly half of communication professionals (45.5 per cent) are often involved in handling cyber security crises and nearly a third of them (31.1 per cent) address cyber security in internal communications. But only a quarter of them are involved in employee cyber security education (26.0 per cent) and even less in developing cyber security guidelines – although nine out of ten cybersecurity issues originate from human error or behaviour, and almost never in the IT department (Kelly, 2017). Therefore, increasing cyber security literacy through education and implementing cyber security technologies (where only 17.7 per cent of communication practitioners are involved) should be priority issues on the professional development agendas for communicators across Europe.

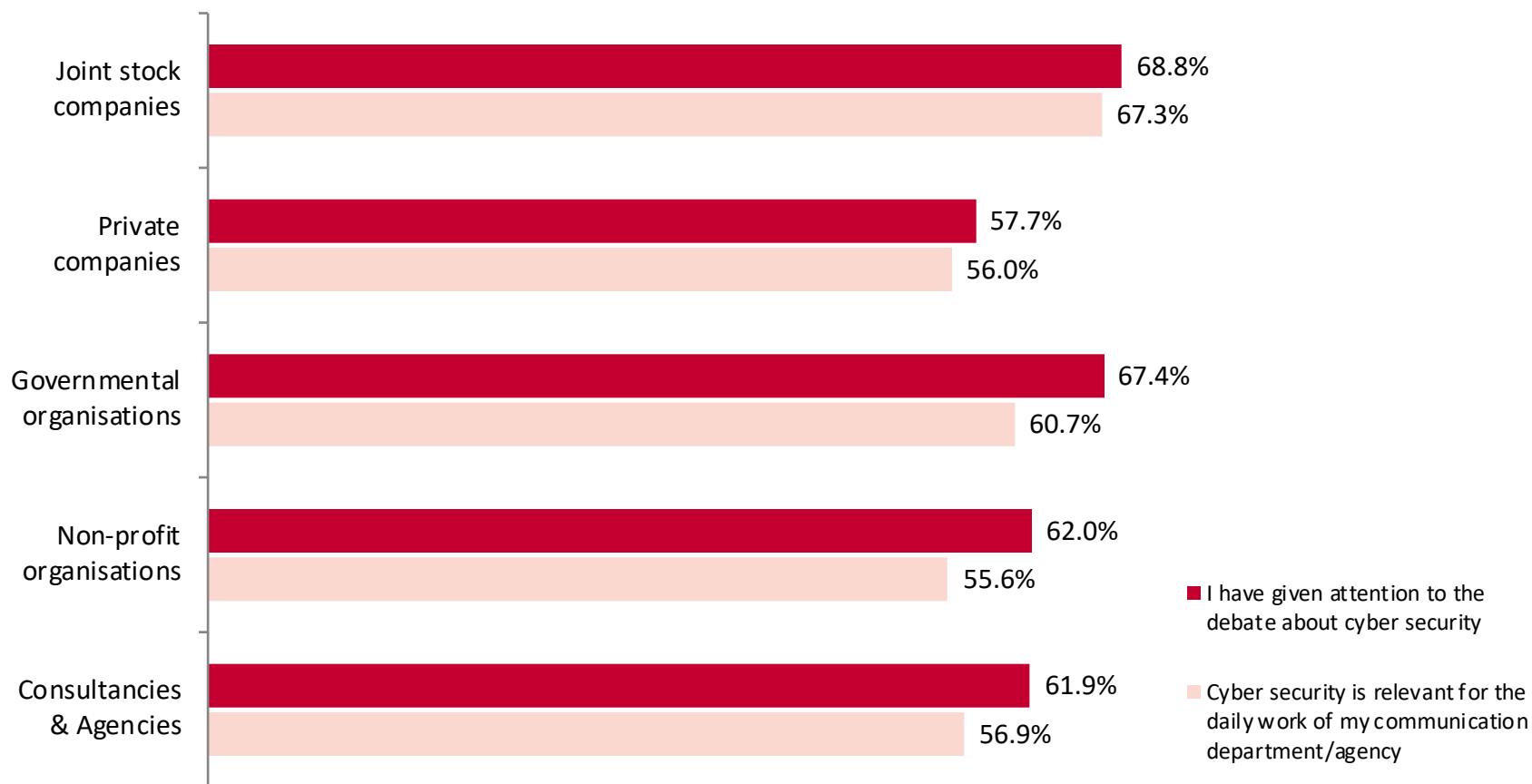
The major concerns for communication departments and agencies in the field of cyber security are that cyber criminals could hack their website and/or social media accounts, close down their digital infrastructure, and to a lesser degree steal data about stakeholders or leak sensitive information. Governmental and public sector entities are more threatened than other types of organisations.

Cyber security – a trending topic in communications across Europe: 6 out of 10 practitioners confirm its relevance for their daily work



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,324 communication professionals. Q4: Organisations are nowadays increasingly threatened by cyber attacks as well as data theft, manipulation and fraud. Thus, cyber security becomes a highly relevant issue in all fields – including communications. We define cyber security as a set of guidelines, technologies and training that provide protection of an organisation's data and of its computer and digital communication infrastructure. Please rate these statements based on your personal experience: ... Scale 1 (Not at all) – 5 (To a great extent). Frequency based on scale points 4-5.

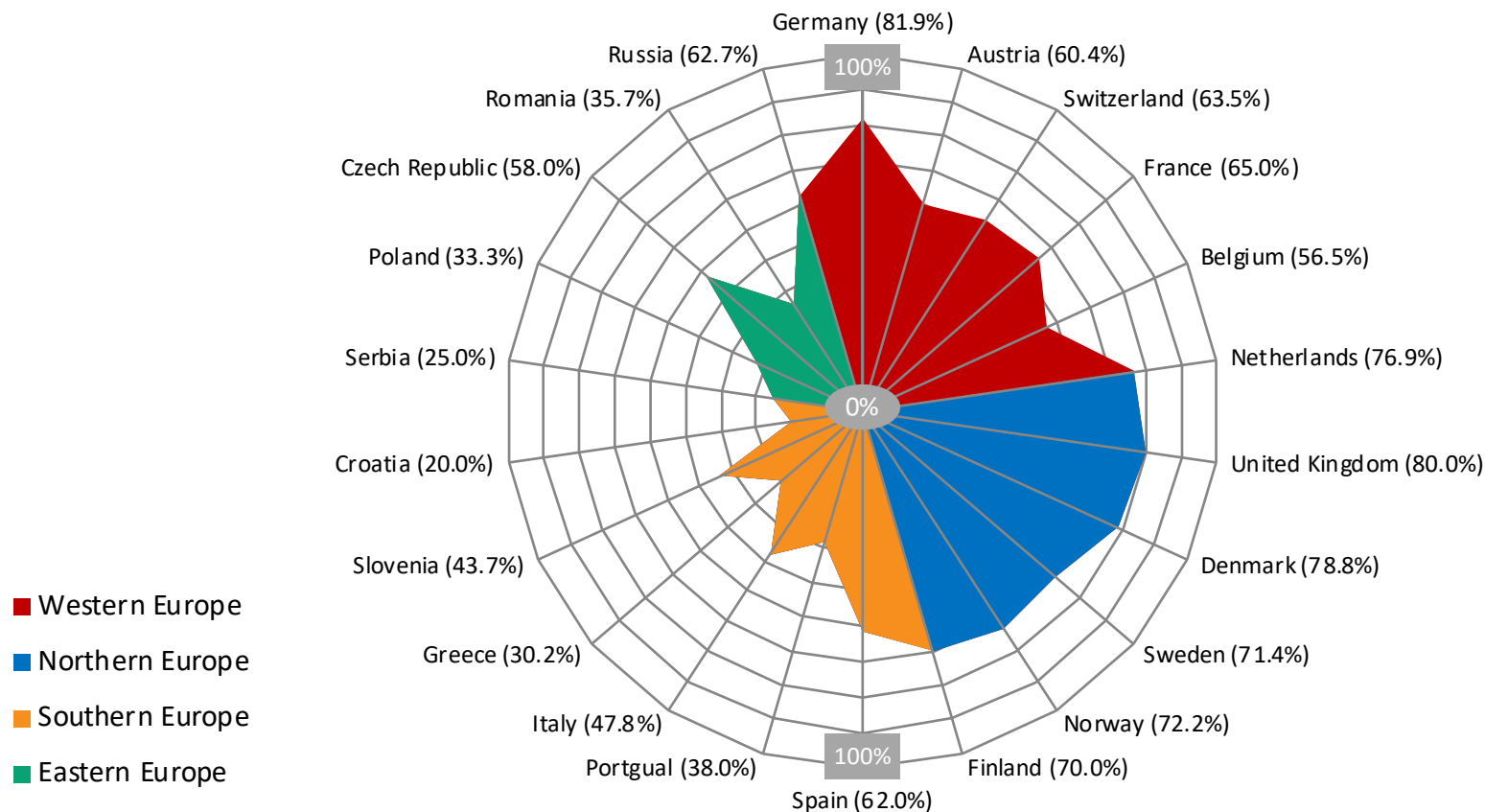
Higher awareness for cyber security issues in communications in joint stock companies and governmental organisations



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,324 communication professionals. Q 4: Organisations are nowadays increasingly threatened by cyber attacks as well as data theft, manipulation and fraud. Thus, cyber security becomes a highly relevant issue in all fields – including communications. We define cyber security as a set of guidelines, technologies and training that provide protection of an organisation's data and of its computer and digital communication infrastructure. Please rate these statements based on your personal experience: ... Scale 1 (Not at all) – 5 (To a great extent). Frequency based on scale points 4-5. Significant differences between various types of organisations (chi-square test, $p \leq 0.05$).

Striking differences across countries: Cyber security is intensively discussed in Western and Northern Europe, but less in Southern and Eastern Europe

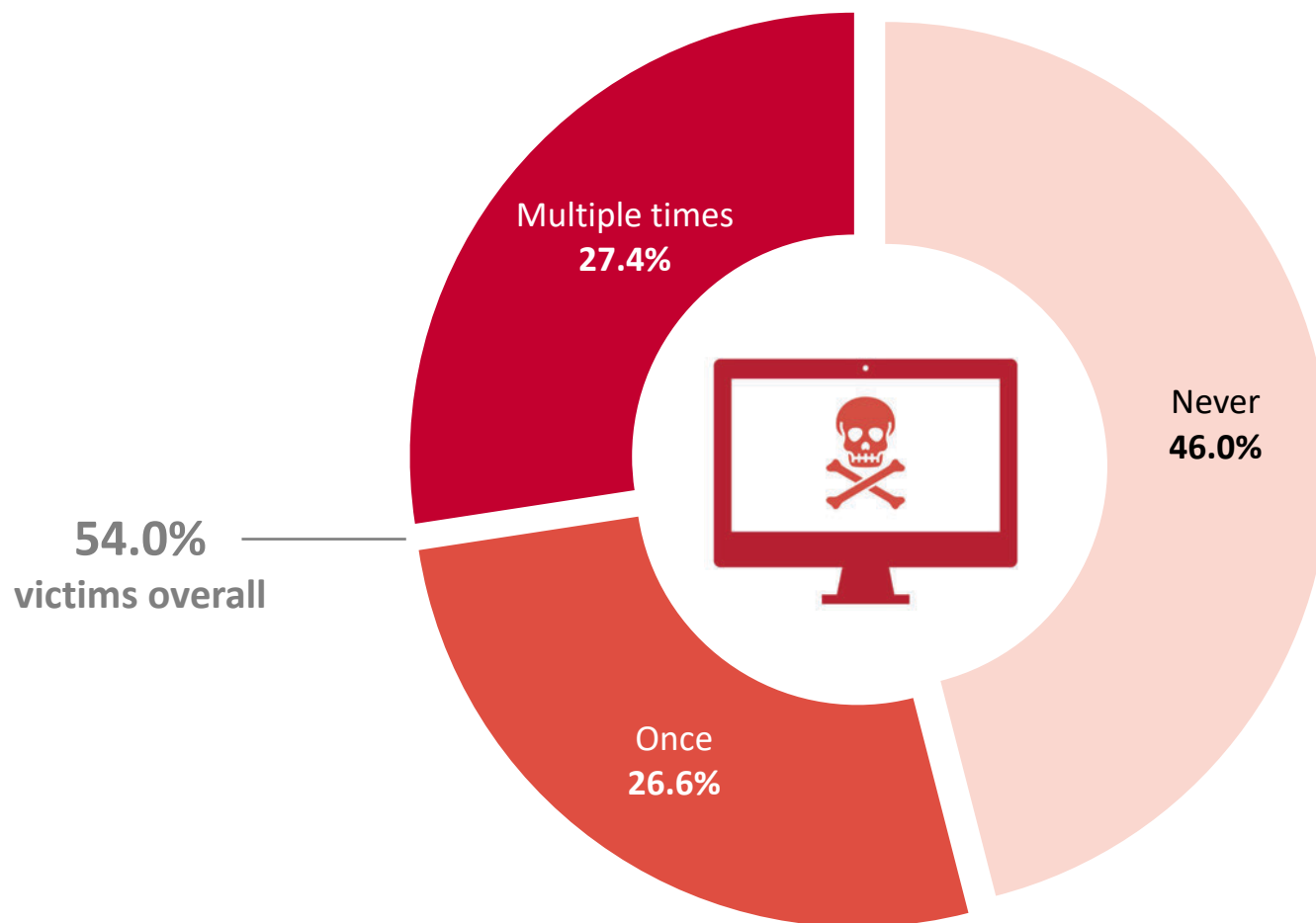
Cyber security is a much debated topic in ...



www.communicationmonitor.eu / Zeffass et al. 2020 / n = 2,048 communication professionals from 22 countries. Q 4: Organisations are nowadays increasingly threatened by cyber attacks as well as data theft, manipulation and fraud. Thus, cyber security becomes a highly relevant issue in all fields – including communications. We define cyber security as a set of guidelines, technologies and training that provide protection of an organisation's data and of its computer and digital communication infrastructure. Please rate these statements based on your personal experience: ... Scale 1 (Not at all) – 5 (To a great extent). Frequency based on scale points 4-5.

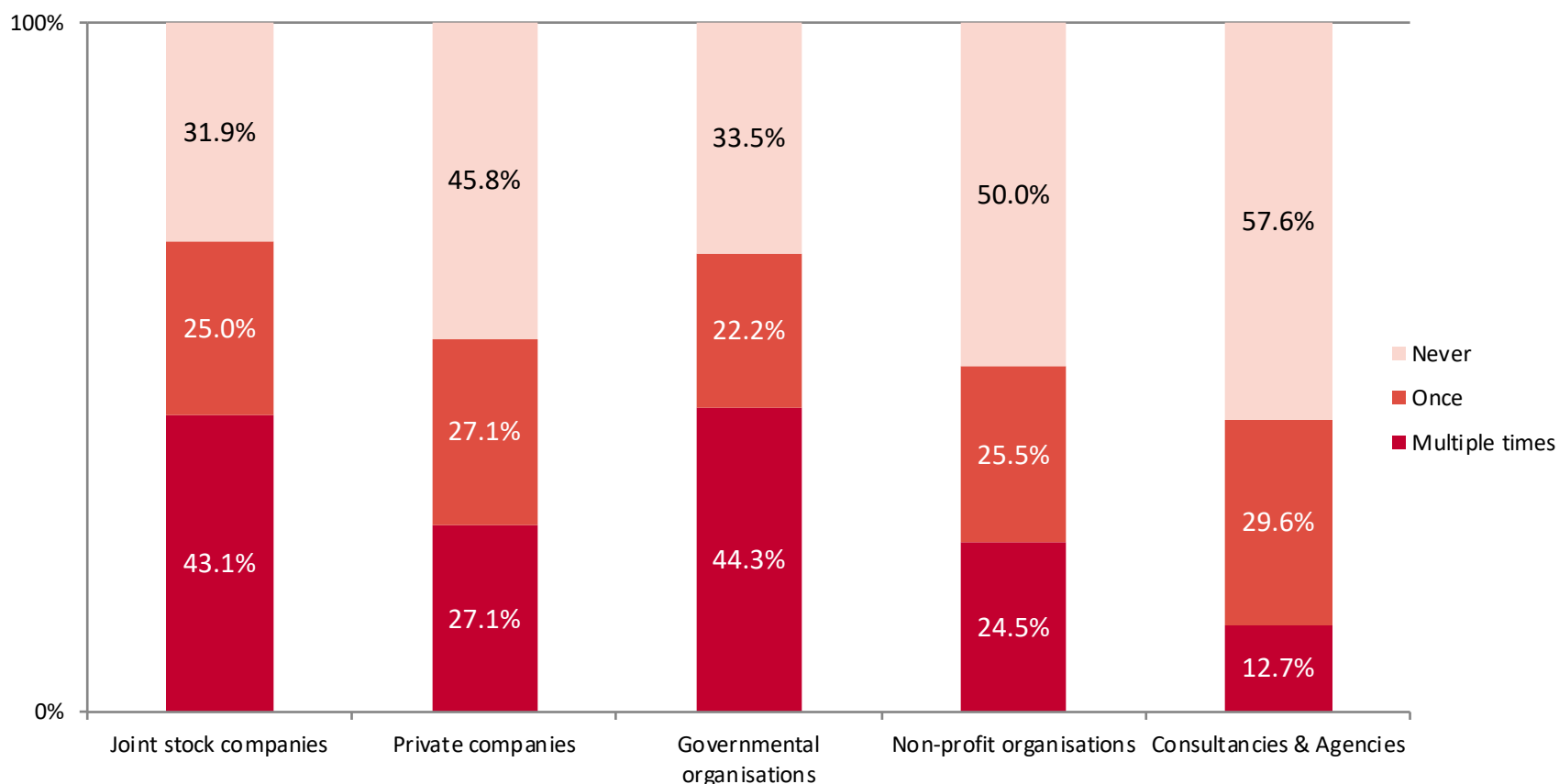
More than half of the communication professionals in Europe have experienced cyber attacks or incidents of data theft in their own organisation

Has your organisation ever been a victim of cyber attacks or data theft?



Cyber criminals are attacking joint stock companies and governmental organisations more frequently

Has your organisation ever been a victim of cyber attacks or data theft?



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 1,809 communication professionals. Q5: Has your organisation ever been a victim of cyber attacks or data theft? No, never / Yes, once / Yes, multiple times / Don't know or don't remember. Highly significant differences between various types of organisations (chi-square test, $p \leq 0.01$).

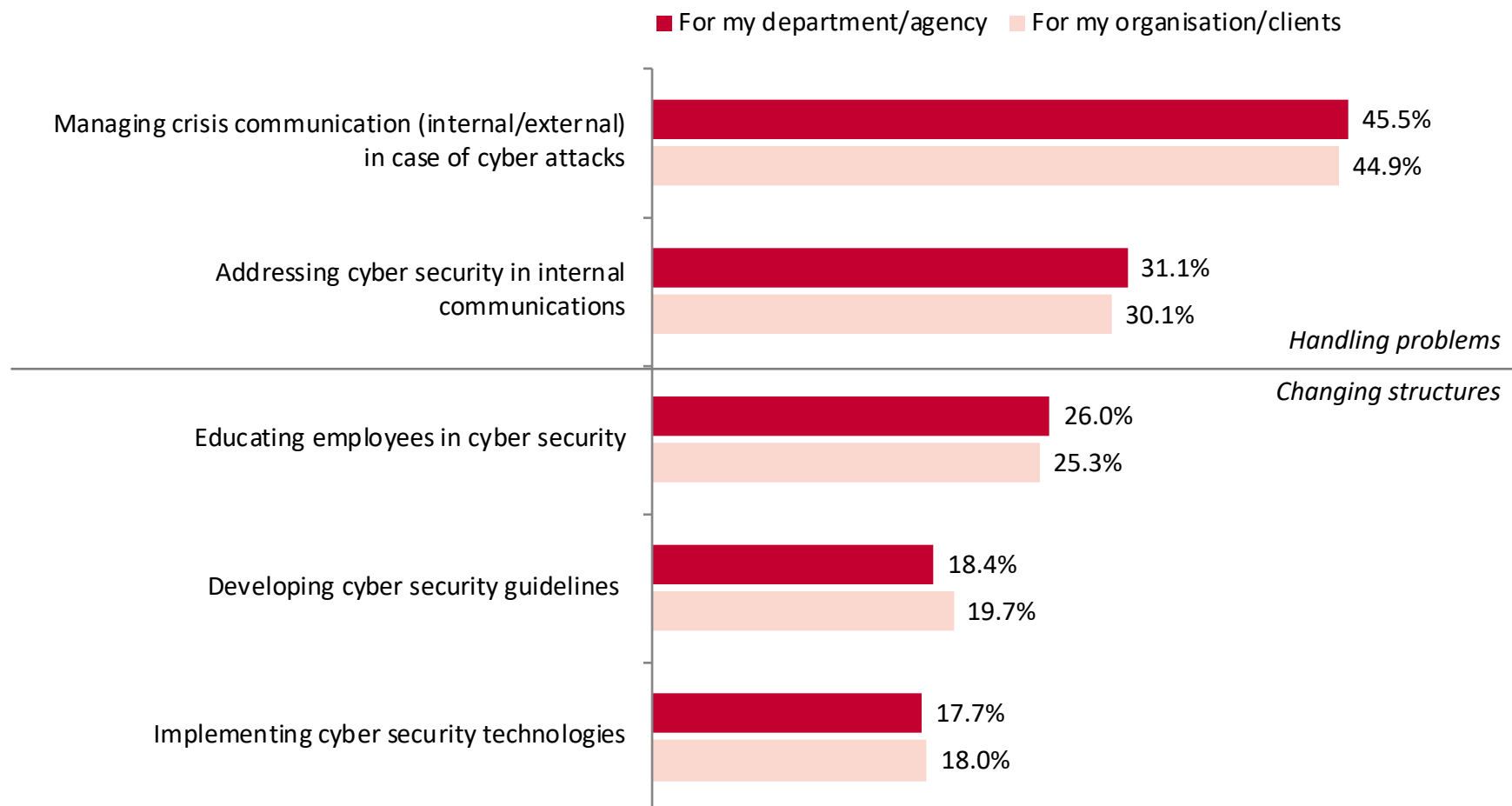
Incidents of cyber attacks and data theft in organisations across Europe

	Never	Once	Multiple times		Never	Once	Multiple times
Germany	37.0%	23.9%	39.1%	Spain	28.4%	36.4%	35.2%
Austria	52.8%	25.9%	21.3%	Portugal	45.8%	35.6%	18.6%
Switzerland	40.5%	24.3%	35.1%	Italy	52.8%	34.9%	12.3%
France	45.9%	16.2%	37.8%	Greece	47.4%	31.6%	21.1%
Belgium	53.3%	20.0%	26.7%	Slovenia	48.3%	17.2%	34.5%
Netherlands	46.7%	30.0%	23.3%	Croatia	40.0%	21.5%	38.5%
United Kingdom	43.0%	25.3%	31.6%	Serbia	44.7%	36.8%	18.4%
Denmark	53.8%	26.9%	19.2%	Poland	54.5%	23.6%	21.8%
Sweden	20.7%	20.7%	58.6%	Czech Republic	53.8%	20.5%	25.6%
Norway	41.4%	22.9%	35.7%	Romania	56.0%	28.0%	16.0%
Finland	50.9%	17.5%	31.6%	Russia	54.3%	26.1%	19.6%

www.communicationmonitor.eu / Zerfass et al. 2020 / n = 1,582 communication professionals from 22 countries. Q5: Has your organisation ever been a victim of cyber attacks or data theft? No, never / Yes, once / Yes, multiple times / Don't know or don't remember. Highly significant differences between countries (chi-square test, $p \leq 0.01$).

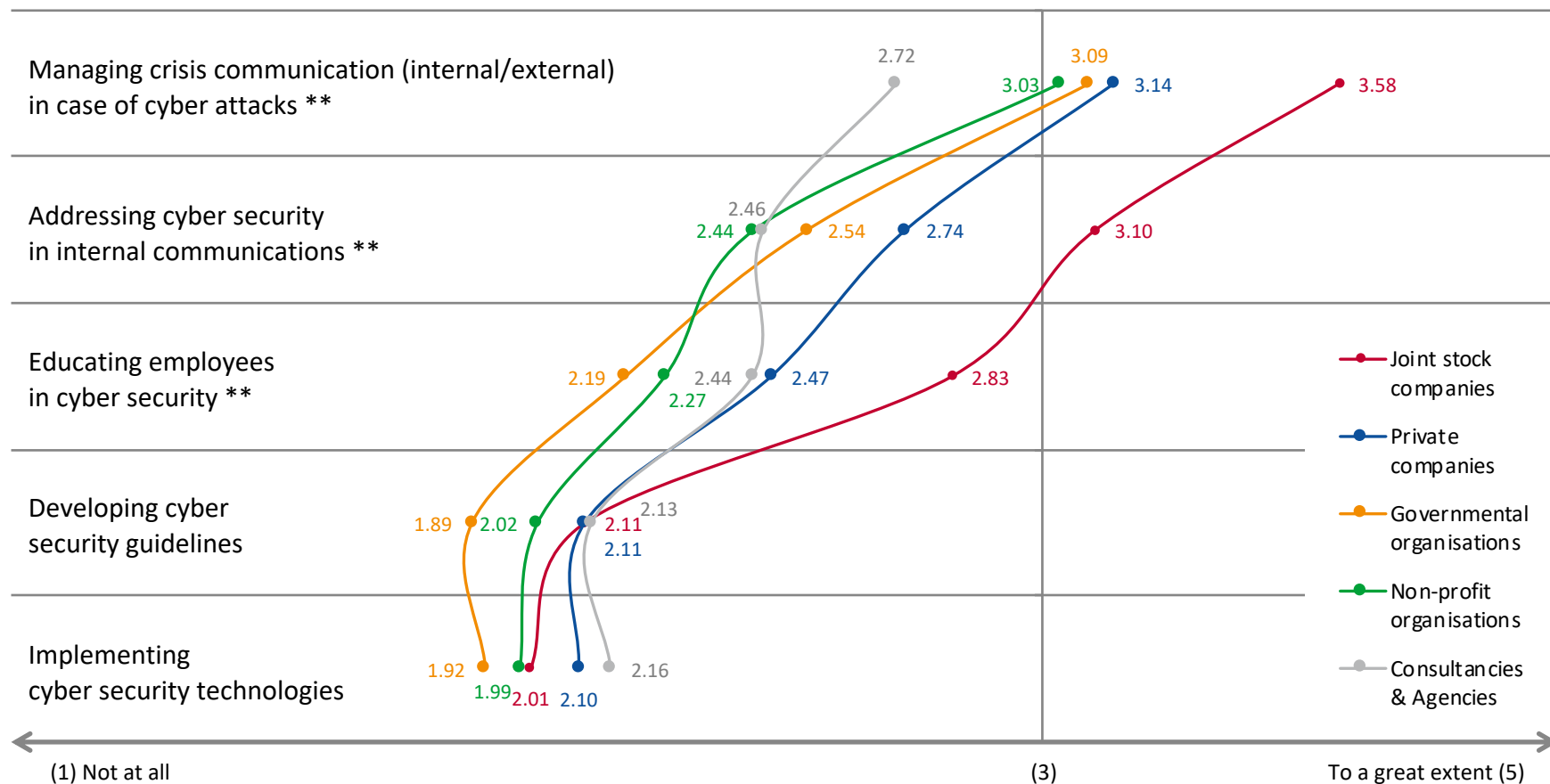
Communication professionals are often involved in handling cyber security issues; but only a minority is helping to build resilience

How communication professionals are engaged in fighting cyber criminality



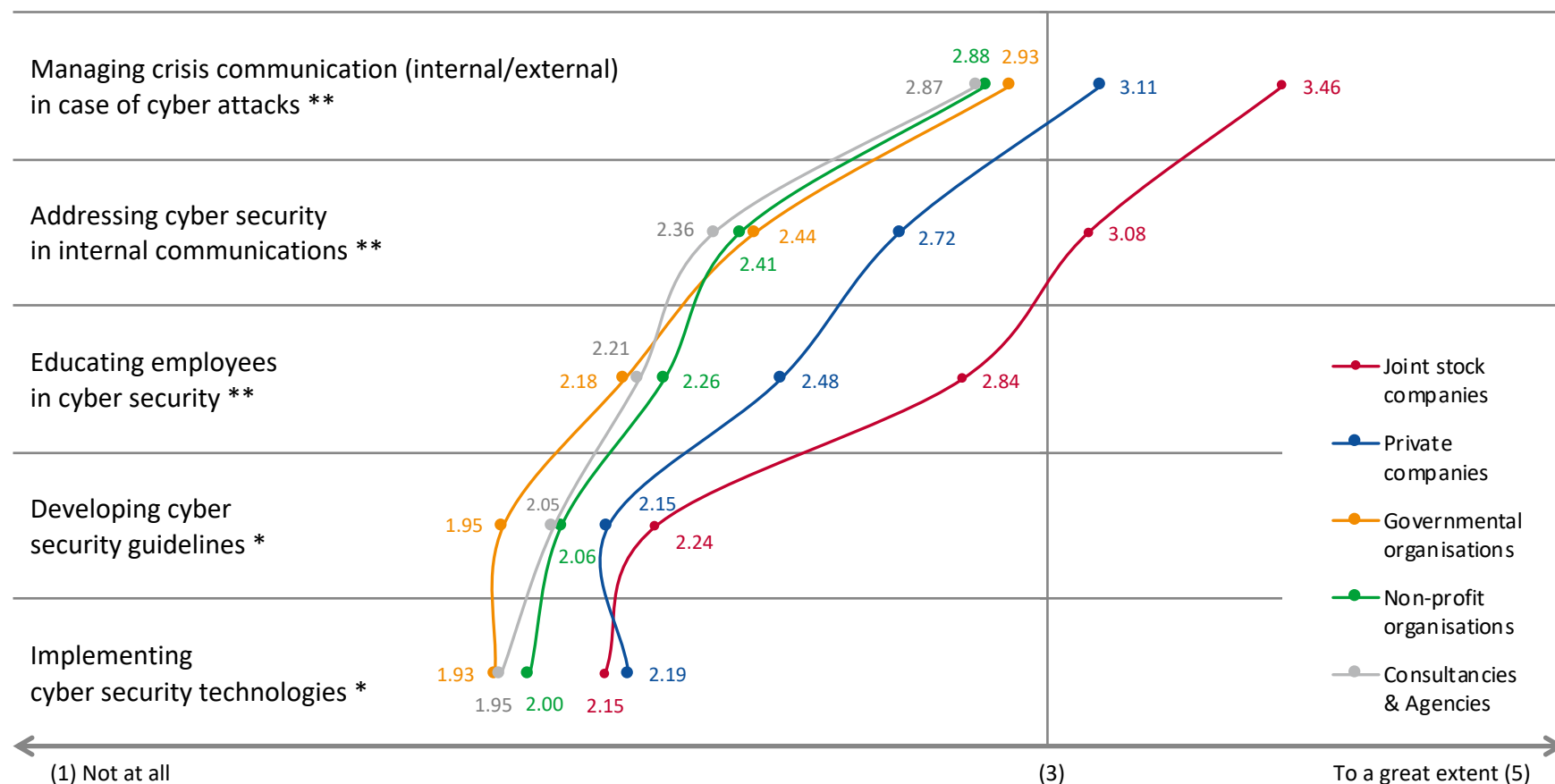
Practitioners working in joint stock and private companies are more actively engaged in cyber security activities for their communication units

How communication professionals are engaged in fighting cyber criminality for their department/agency



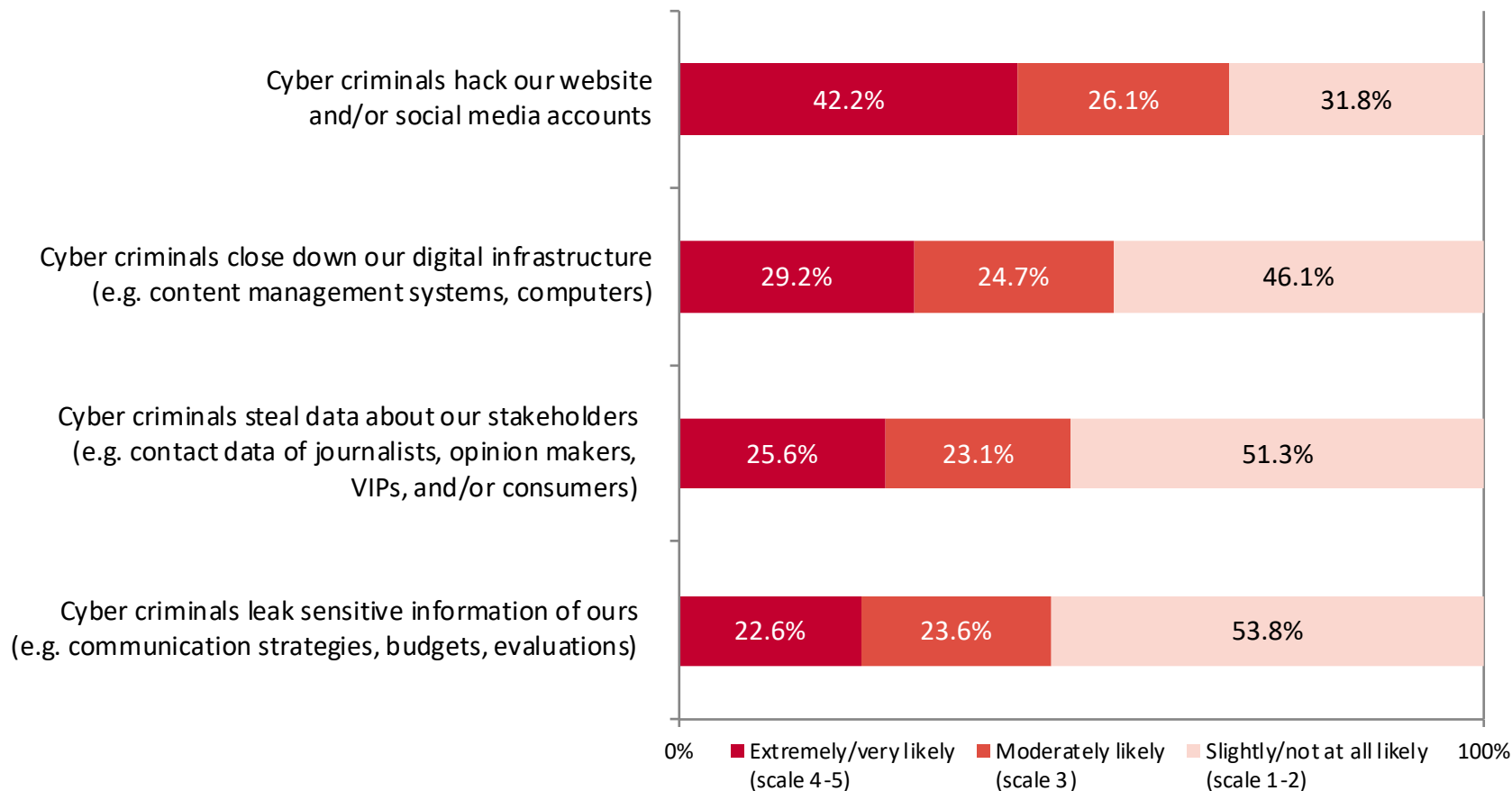
Communicators in joint stock and private companies are also more involved in fighting cyber criminality for their whole organisation

How communication professionals are engaged in fighting cyber criminality for their organisation/client



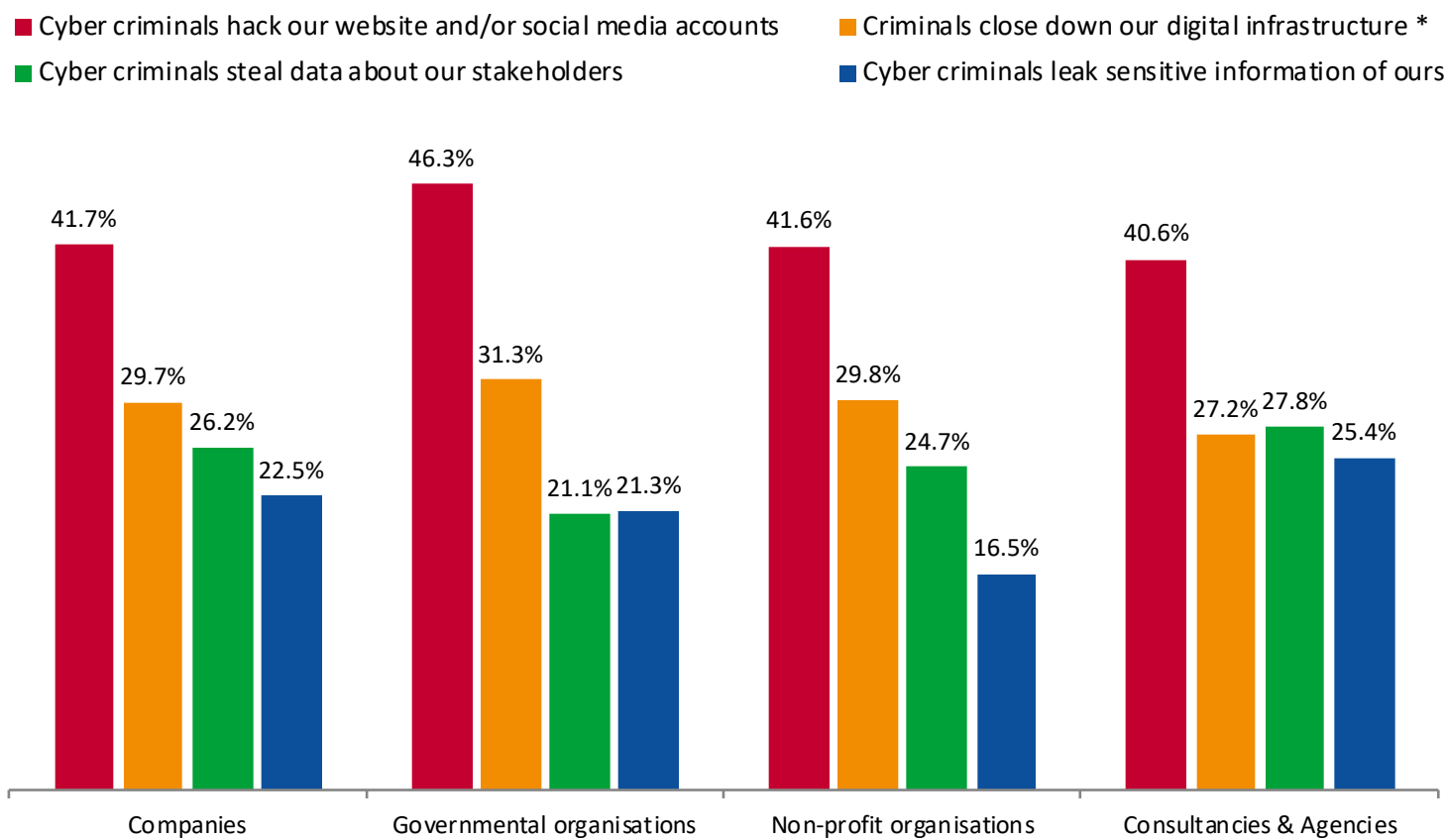
Cyber attacks on communication departments and agencies: Hacked websites and social media accounts are the greatest threat

Estimated probability of different cyber attack incidents



Governmental and public sector organisations are especially concerned about criminal attacks on their online platforms and digital infrastructure

Estimated probability of different cyber attack incidents



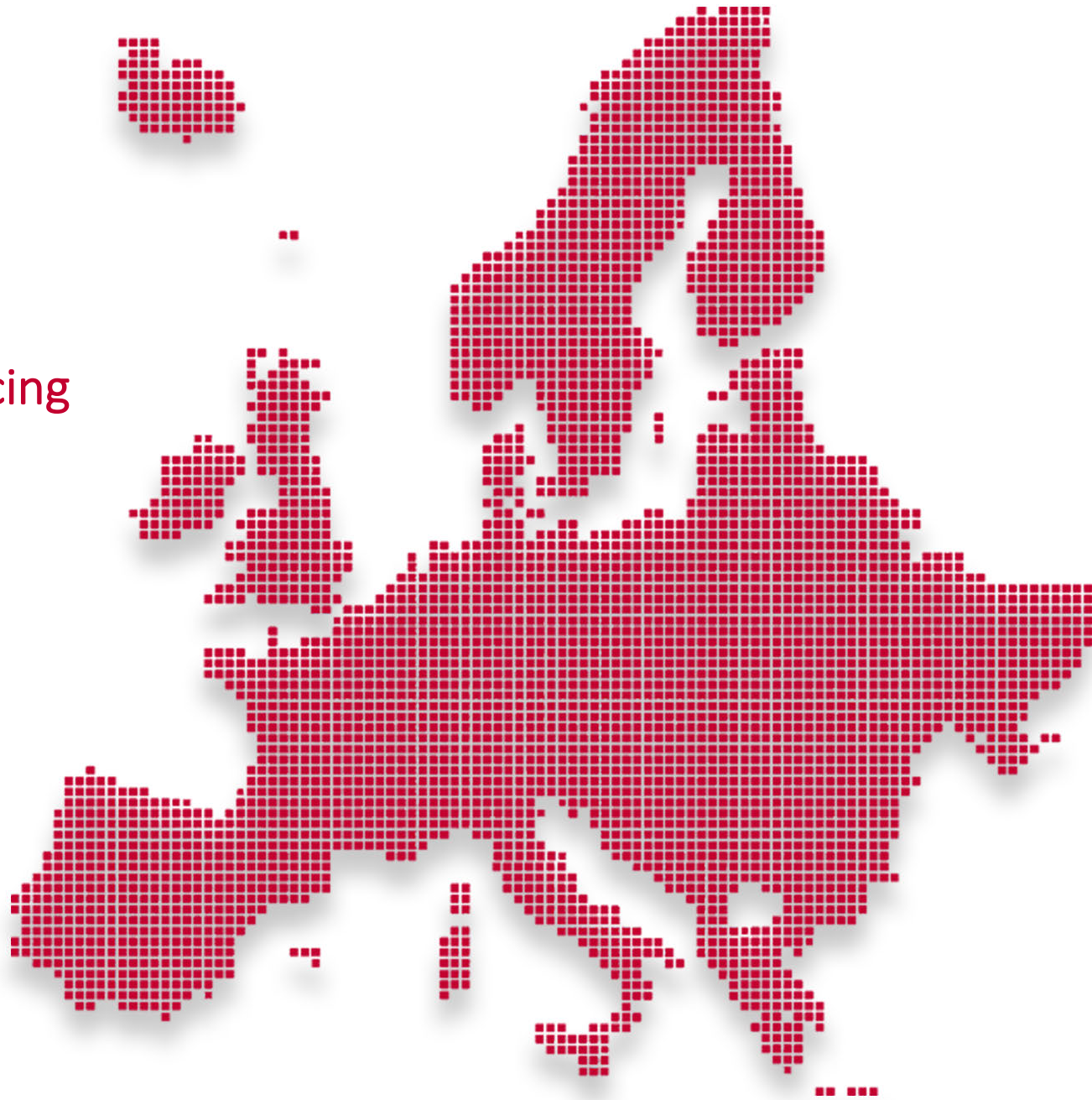
www.communicationmonitor.eu / Zerfass et al. 2020 / n ≥ 2,160 communication professionals. Q 7: Each organisation and each department might get attacked by cyber criminals – also communications, which relies on digital data and infrastructure in many ways. Thinking of your communication department or agency, how likely are the following incidents from your point of view? Scale 1 (Not likely at all) – 5 (Extremely likely). Frequency based on scale points 4-5.
 * Significant differences (chi-square test, $p \leq 0.05$).

Anticipation of cyber attacks on communication units across Europe

	Cyber criminals steal data about our stakeholders	Cyber criminals close down our digital infrastructure	Cyber criminals hack our website / social media accounts	Cyber criminals leak sensitive information of ours		Cyber criminals steal data about our stakeholders	Cyber criminals close down our digital infrastructure	Cyber criminals hack our website / social media accounts	Cyber criminals leak sensitive information of ours
Germany	27.2%	31.2%	47.1%	24.7%	Spain	27.2%	31.1%	45.2%	29.0%
Austria	28.9%	28.4%	40.4%	23.0%	Portugal	27.1%	30.1%	32.9%	30.1%
Switzerland	31.1%	40.0%	54.4%	17.8%	Italy	23.1%	21.5%	28.6%	22.8%
France	37.1%	42.9%	47.2%	34.3%	Greece	21.4%	32.6%	33.3%	19.0%
Belgium	31.7%	36.6%	46.6%	25.0%	Slovenia	29.2%	26.2%	47.0%	17.2%
Netherlands	27.0%	32.7%	36.9%	22.5%	Croatia	17.5%	20.3%	34.6%	14.8%
United Kingdom	23.2%	29.5%	52.1%	18.9%	Serbia	21.2%	27.7%	42.5%	22.1%
Denmark	22.6%	20.0%	45.2%	10.0%	Poland	31.7%	28.3%	38.3%	22.4%
Sweden	12.3%	32.9%	44.7%	12.3%	Czech Republic	26.0%	12.0%	40.0%	22.0%
Norway	20.9%	29.4%	43.0%	16.3%	Romania	23.5%	31.1%	38.9%	24.5%
Finland	17.9%	20.5%	44.9%	12.8%	Russia	30.2%	27.8%	39.3%	27.3%

www.communicationmonitor.eu / Zeffass et al. 2020 / n ≥ 1,902 communication professionals from 22 countries. Q 7: Each organisation and each department might get attacked by cyber criminals – also communications, which relies on digital data and infrastructure in many ways. Thinking of your communication department or agency, how likely are the following incidents from your point of view? Scale 1 (Not likely at all) – 5 (Extremely likely). Frequency based on scale points 4-5.

Assessing and advancing
gender equality



Assessing and advancing gender equality

Since the United Nations addressed gender equality as the fifth of 17 Sustainable Development Goals (SDG), business in general and the PR and communication industry in particular, have promoted discussion on the issue. Special reports (i.e. CIPR, 2017; GWPR, 2019) along with particular networks to enhance women's leadership have been established and gained traction. Industry reports and the most recent scientific meta-studies (Place & Vardeman-Winter, 2018; Topić et al., 2020) corroborate that gender inequalities and discriminations still persist in the communications field. Annually the European Communication Monitor monitors female practitioners and gender issues in the profession. This year it evaluates how gender equality achievements are perceived. The study also explores the awareness of the *glass ceiling* and its causes and responsibilities at the individual, organisational and profession level.

Gender issues remain a particular concern in an industry where three out of four departments and agencies in Europe employ more women than men, but still only one out of two leaders are women. Over half of practitioners (55.4 per cent) observe an improvement in gender equality in their country, but disagreement arises when it comes to evaluating how much has actually been done to support female practitioners: every second man (50.1 per cent) believes enough has been done, while most women (45.2 per cent) strongly dispute that. The *glass ceiling* refers to unacknowledged barriers that keep female practitioners from rising in the hierarchy (Dowling, 2017). There are still 32 per cent of European communication practitioners that deny the glass ceiling exists at any level. 42.6 per cent acknowledge the problem at the professional level in their country, but only 22.4 per cent concede it is an issue in their own organisation or department.

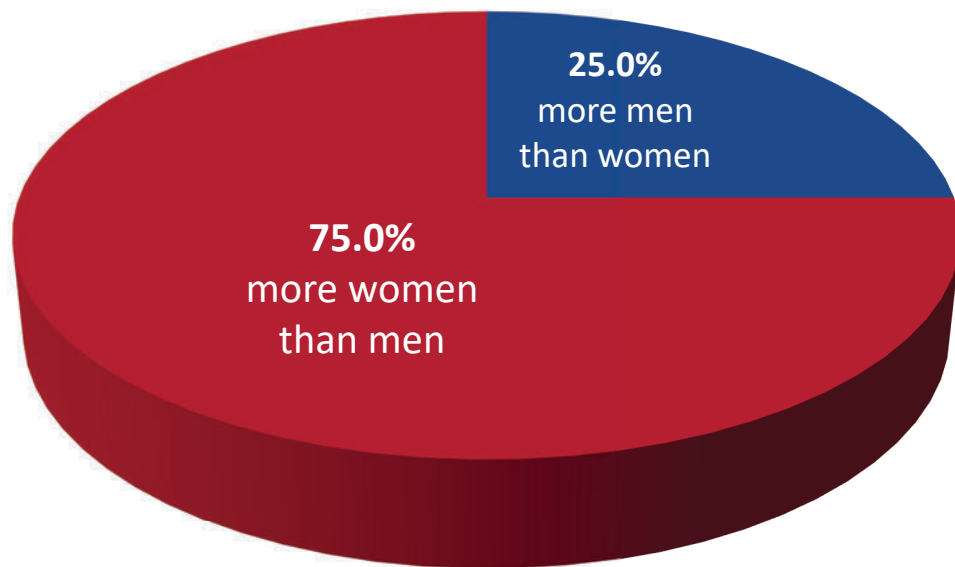
According to previous research, denial occurs in the field (Yeomans, 2019) and is most commonly seen in male practitioners (Zerfass et al., 2014). This study shows that only three out of ten male respondents (29.6 per cent) acknowledge the problem in the profession and only 11.2 per cent accept it is observable in their organisation or department. In contrast every third female practitioner (29.4 per cent) believes they have been personally affected.

When considering factors that perpetuate the glass ceiling, the results corroborate previous research (Catalyst, 2004; GWPR, 2019; Meng & Neill, 2020; Moreno et al., 2020). The majority identify issues at the organisational level: lack of flexibility to take care of family obligations (61.6 per cent) and intransparent promotion policies (57.9 per cent). Barriers at the macro level of the profession are also identified – a lack of networks and programmes for women (39.2 per cent) and too few inspiring female role models (33.9 per cent). Yet, at the individual level a lack of motivation and competences of female practitioners is identified by a small number of respondents (15.4 per cent), less than two out of ten respondents. Because psychological and cognitive differences are not empirically conclusive, gender differences tend to be explained today in educational, social and cultural factors (Mazei et al., 2015; Tench et al., 2017a). Responsibilities for overcoming the glass ceiling are also placed at the organisational level for 65.3 per cent of respondents. Nevertheless, CCOs and agency CEOs tend to attribute shared responsibilities to the professional communities and female employees.

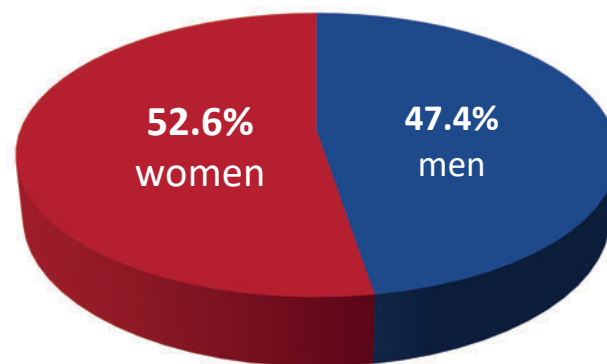
Results of this study reinforce that gender prejudices still exist in the profession in Europe. The main factors for the glass ceiling relate to work-life balance conflicts and interventions are needed firstly from organisations and secondly from professional communities.

Gender issues at work: In 75 percent of communications departments and agencies, women are in the majority, but only every second top communicator is female

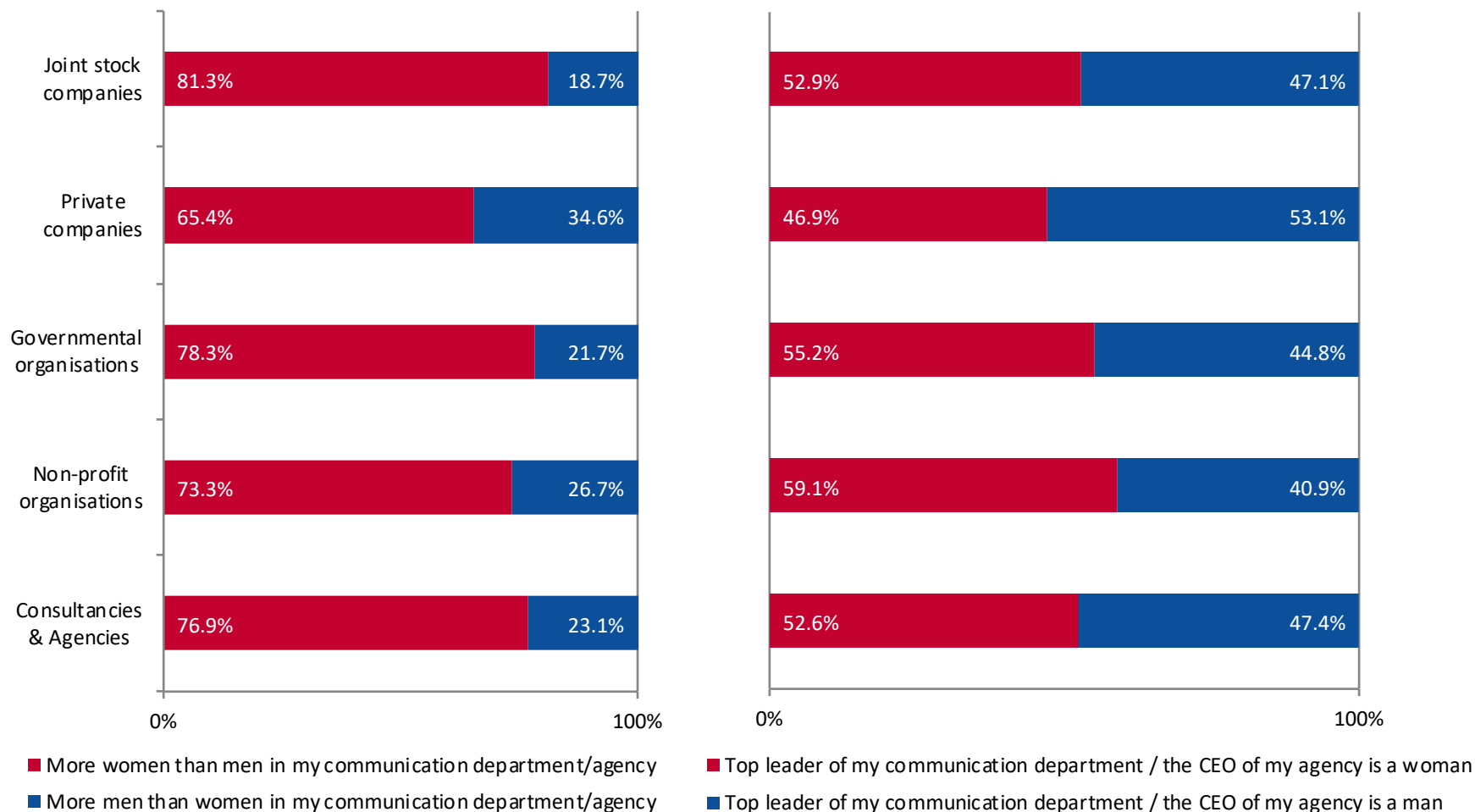
Practitioners working in communication departments and agencies



Top leaders of communication departments and agencies

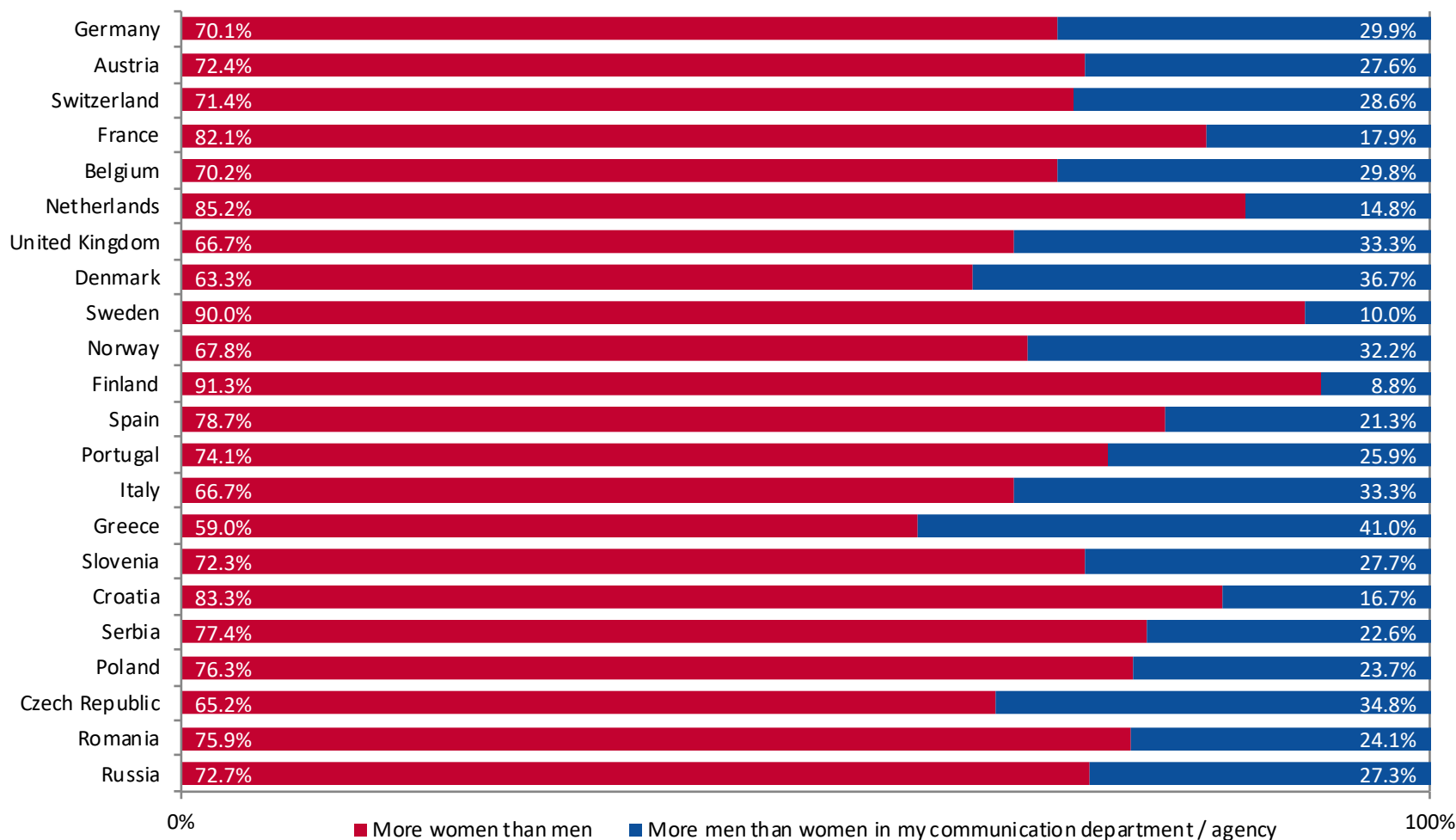


Female communicators are predominant in all types of organisations – female leadership is stronger in non-profits and falling short in private companies



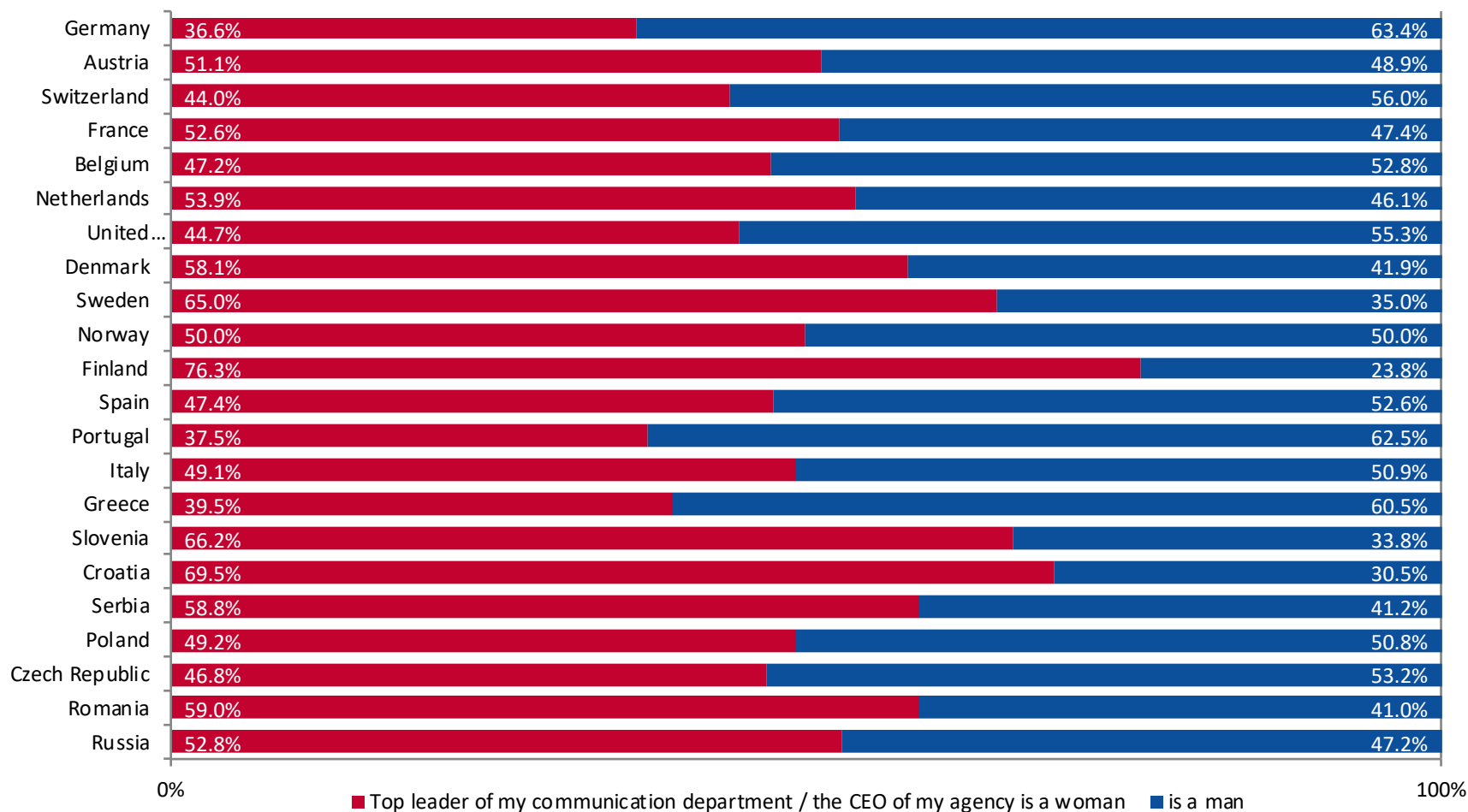
www.communicationmonitor.eu / Zerfass et al. 2020 / $n \geq 2,151$ communication professionals. Q 32: How is the situation regarding women in leading communication positions in your organisation? The top leader of my communication department/the CEO of my agency is a woman / Overall, there are more women than men in my communication department/agency. Scale: Yes / No / N/A. (Highly) significant differences between various types of organisations (chi-square test, $p \leq 0.01$ / $p \leq 0.05$).

Nine out of ten communication departments and agencies in Finland and Sweden are dominated by female professionals, compared to only 59 per cent in Greece



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 1,897 communication professionals from 22 countries. Q32: How is the situation regarding women in leading communication positions in your organisation? The top leader of my communication department/the CEO of my agency is a woman / Overall, there are more women than men in my communication department/agency. Scale: Yes / No / N/A. Highly significant differences between countries (chi-square test, $p \leq 0.01$).

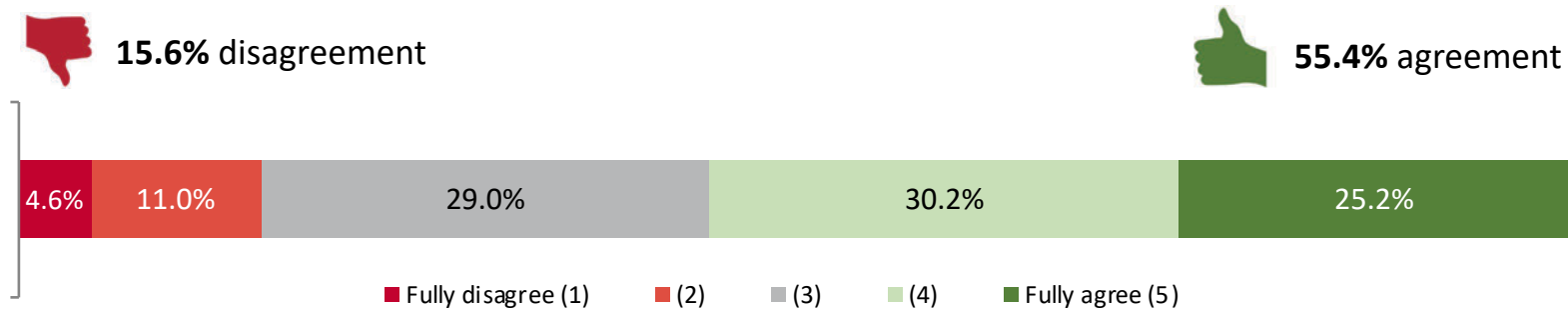
Female leadership in communications is strong in Finland, Sweden, Croatia, and Slovenia, while Germany, Portugal and Greece are lagging behind



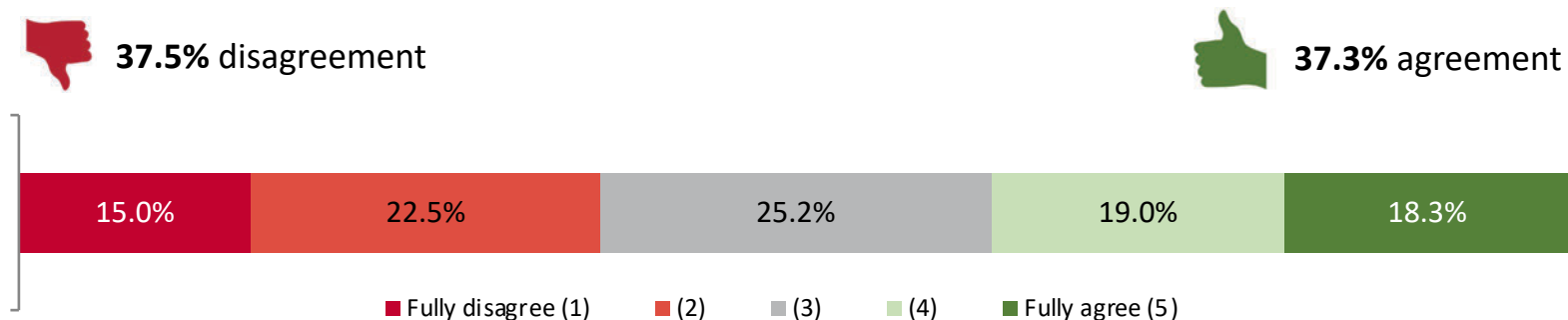
www.communicationmonitor.eu / Zerfass et al. 2020 / n = 1,925 communication professionals from 22 countries. Q 32: How is the situation regarding women in leading communication positions in your organisation? The top leader of my communication department/the CEO of my agency is a woman / Overall, there are more women than men in my communication department/agency. Scale: Yes / No / N/A. Highly significant differences between countries (chi-square test, $p \leq 0.01$).

Most communicators in Europe state that gender equality has improved recently, but they disagree whether enough is being done to support women in the field

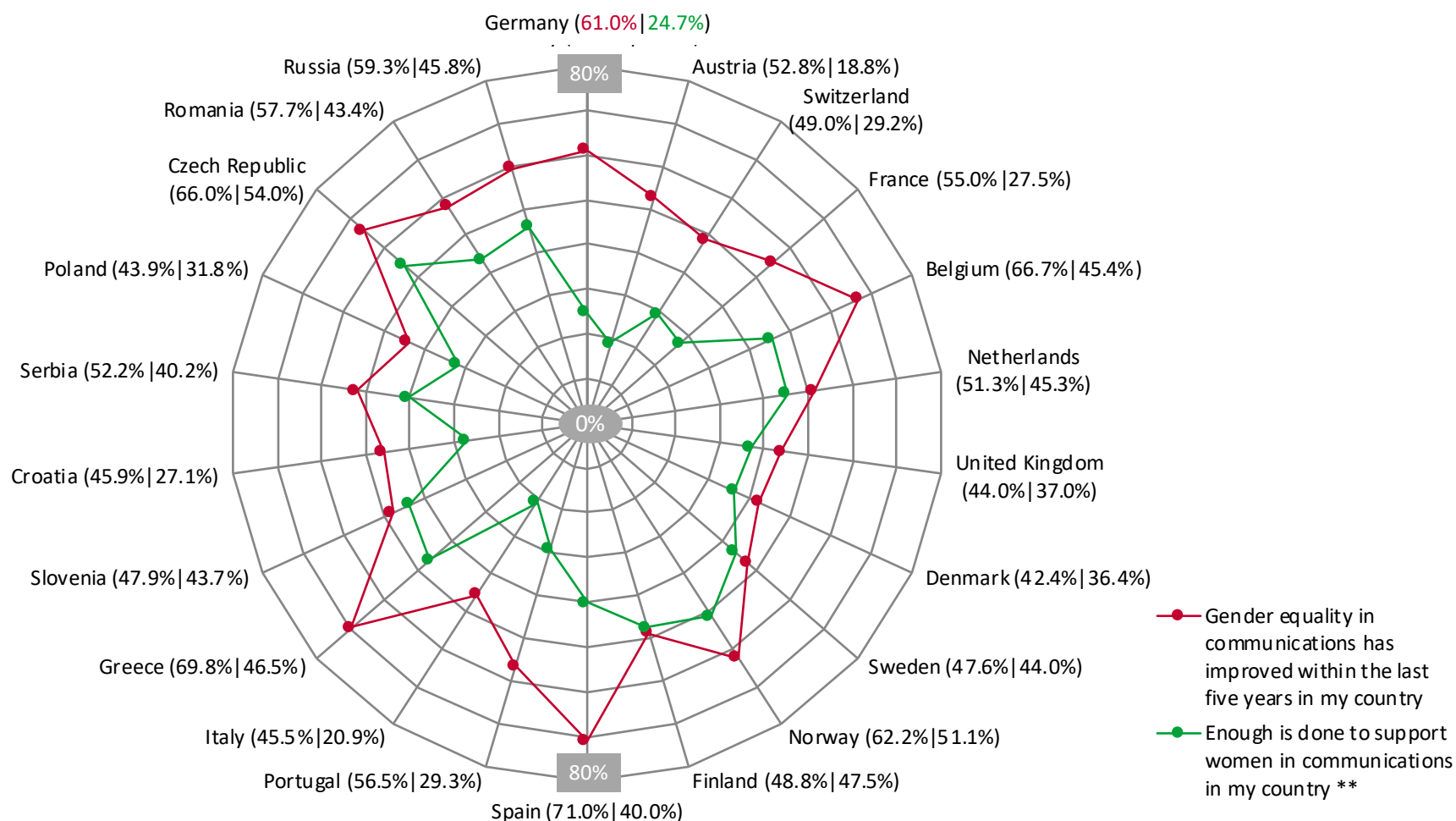
“Gender equality in communications has improved within the last five years in my country.”



“Enough is done to support women in communications in my country.”



Gender equality has improved significantly in Spain, Greece, Belgium, and the Czech Republic; more support is especially asked for in Austria, Italy, and Germany

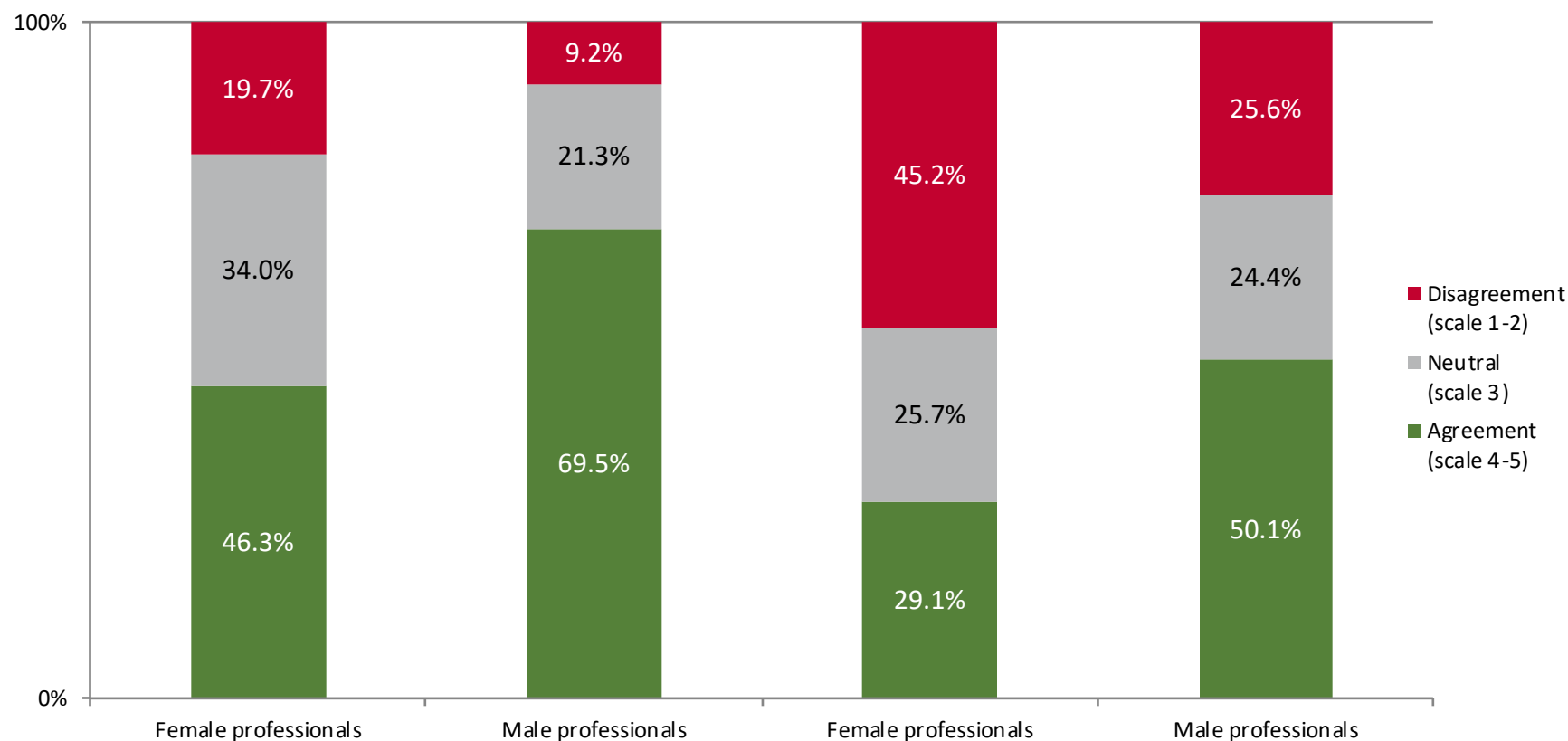


www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,048 communication professionals from 22 countries. Q8: Gender issues are heavily discussed at the moment across all professions – especially the equality of women and men. How would you assess the current situation of women in strategic communication and public relations? Scale 1 (Fully disagree) – 5 (Fully agree). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, $p \leq 0.01$).

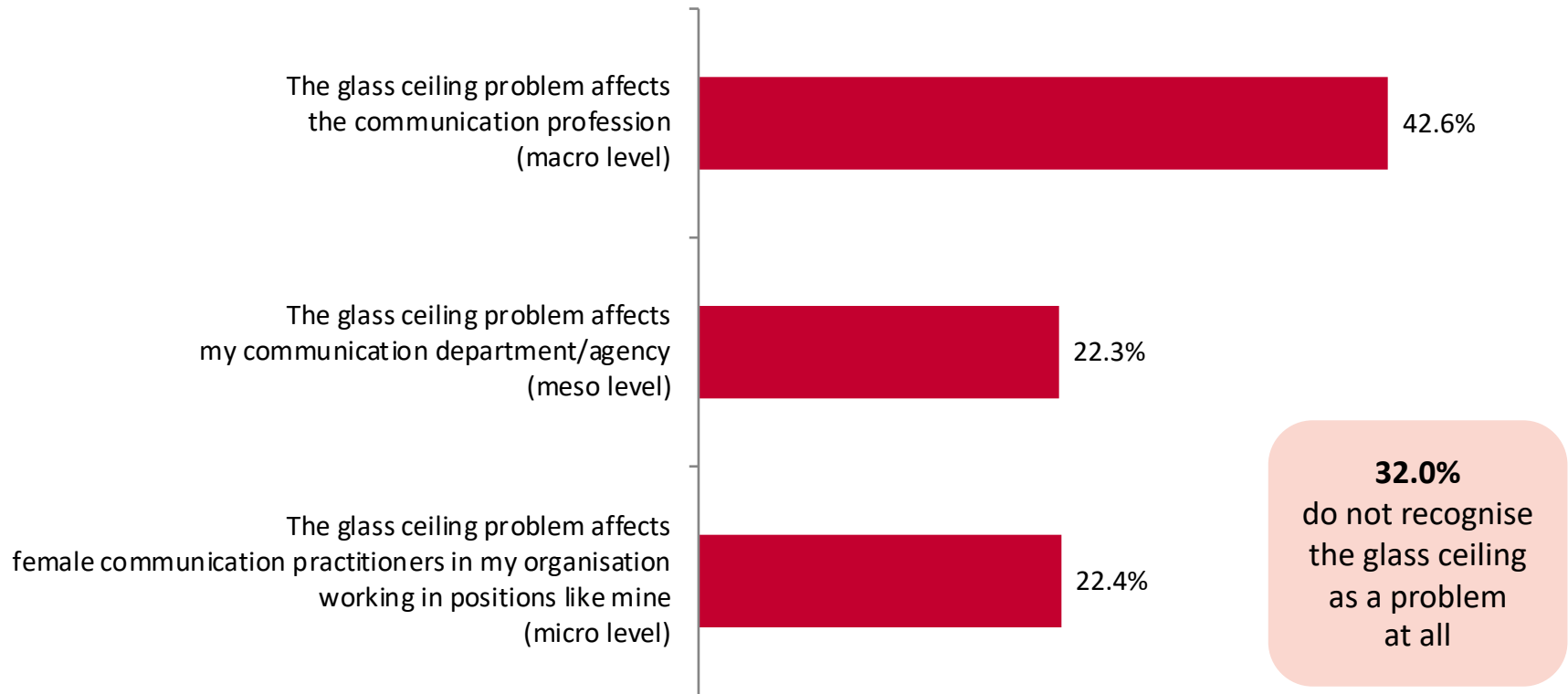
Male respondents assess the current situation of women in the profession more positively than female colleagues; every second believes that there is enough support

*“Gender equality in communications has improved within the last five years in my country.” ***

*“Enough is done to support women in communications in my country.” ***



Four out of ten communication practitioners in Europe believe a glass ceiling problem exists in the profession, but only every fifth reports about it in their own environment

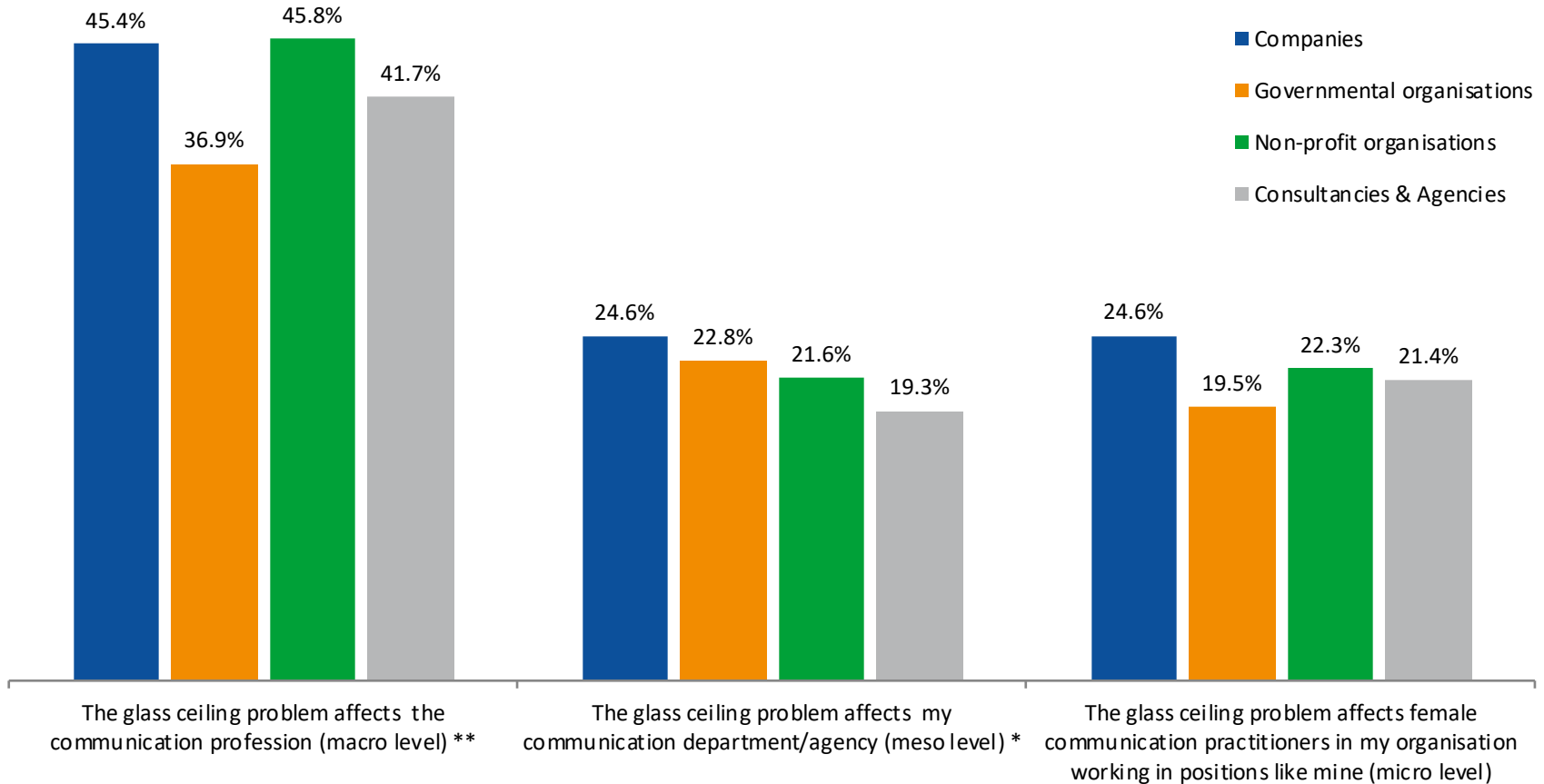


Glass ceiling

= an invisible barrier that keeps female practitioners from rising beyond a certain level in the hierarchy

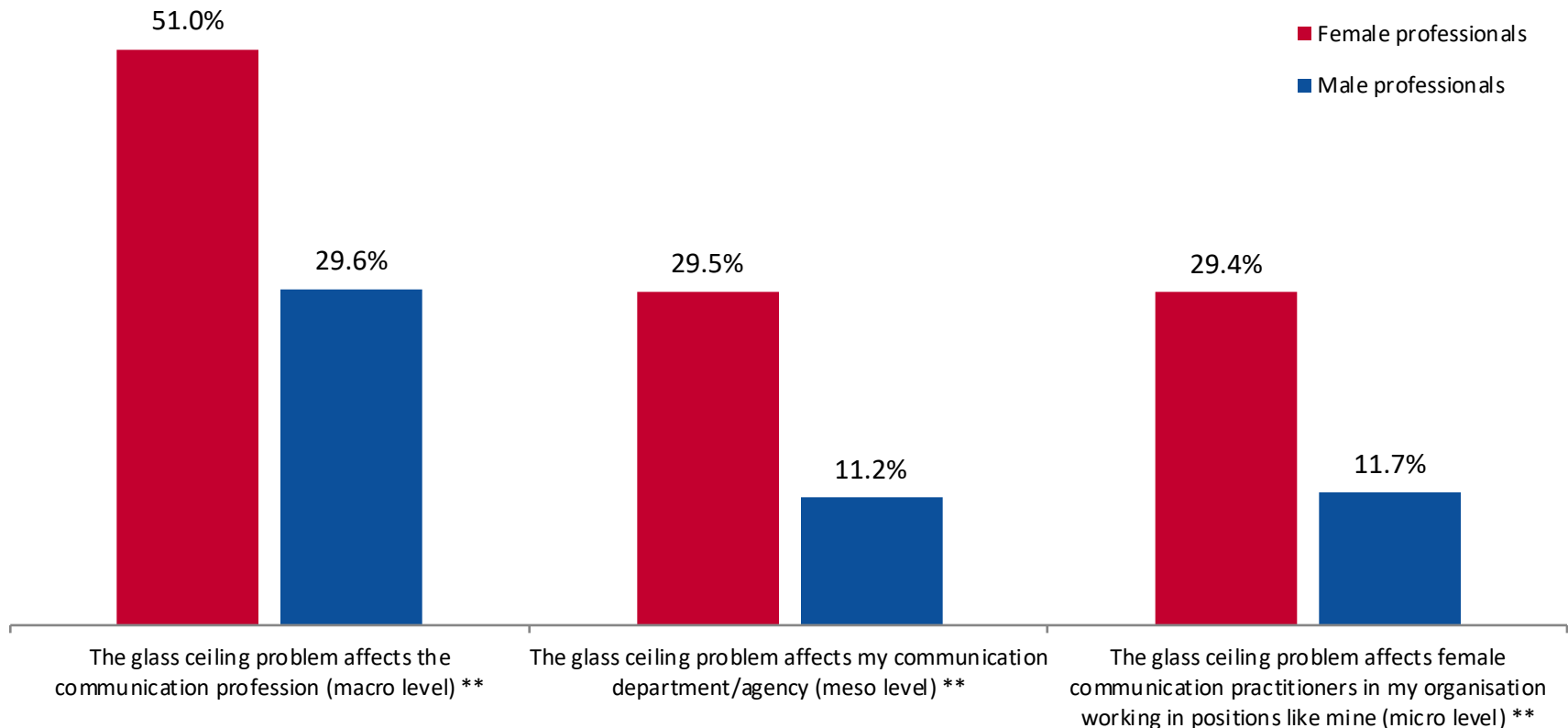
www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,204 communication professionals. Q.9a: In many professions, women are less often found in leading positions. This phenomenon is referred to as the “glass ceiling” – an invisible barrier that keeps female practitioners from rising beyond a certain level in the hierarchy. How do you perceive the situation in the communication profession in your country and in your organisation? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequency based on scale points 4-5. Not recognizing the problem at all = respondents who disagreed with all three items (scale points 1-2).

Significant differences across various types of organisations: The glass ceiling problem is perceived as most relevant in companies



www.communicationmonitor.eu / Zerfass et al. 2020 / $n \geq 2,204$ communication professionals. Q 9a: In many professions, women are less often found in leading positions. This phenomenon is referred to as the “glass ceiling” – an invisible barrier that keeps female practitioners from rising beyond a certain level in the hierarchy. How do you perceive the situation in the communication profession in your country and in your organisation? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, $p \leq 0.01$). * Significant differences (chi-square test, $p \leq 0.05$).

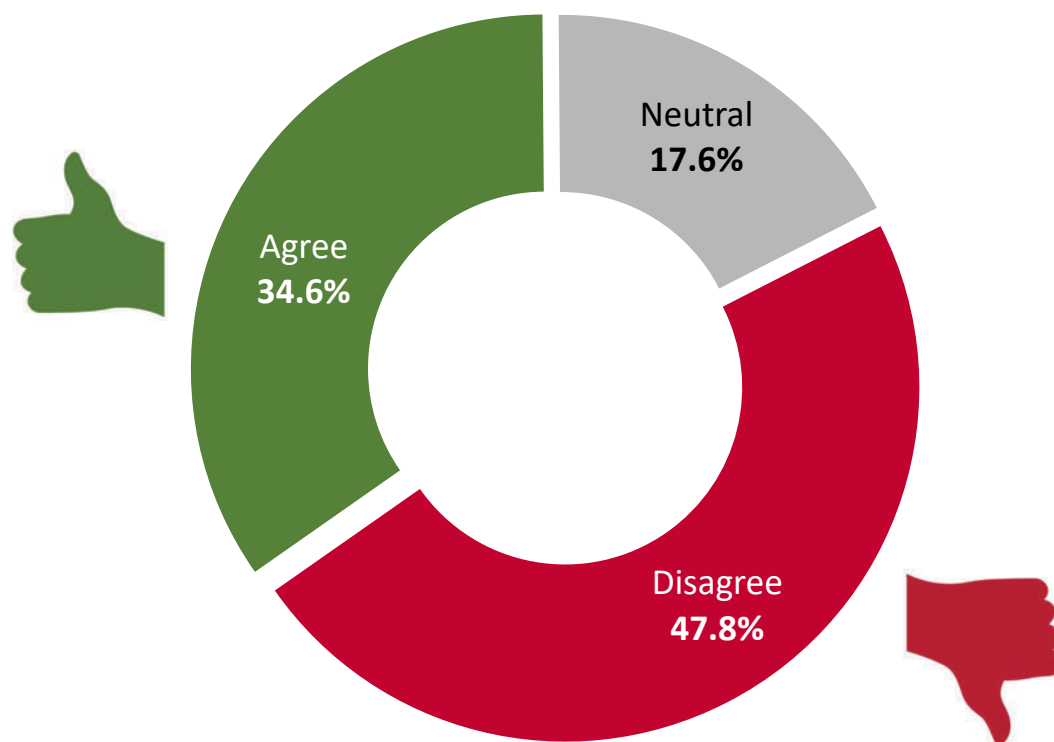
Women working in the communications profession are much more aware of unacknowledged barriers for promotion on the macro, meso, and micro level



www.communicationmonitor.eu / Zerfass et al. 2020 / $n \geq 2,201$ communication professionals. Q.9a: In many professions, women are less often found in leading positions. This phenomenon is referred to as the “glass ceiling” – an invisible barrier that keeps female practitioners from rising beyond a certain level in the hierarchy. How do you perceive the situation in the communication profession in your country and in your organisation? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, $p \leq 0.01$).

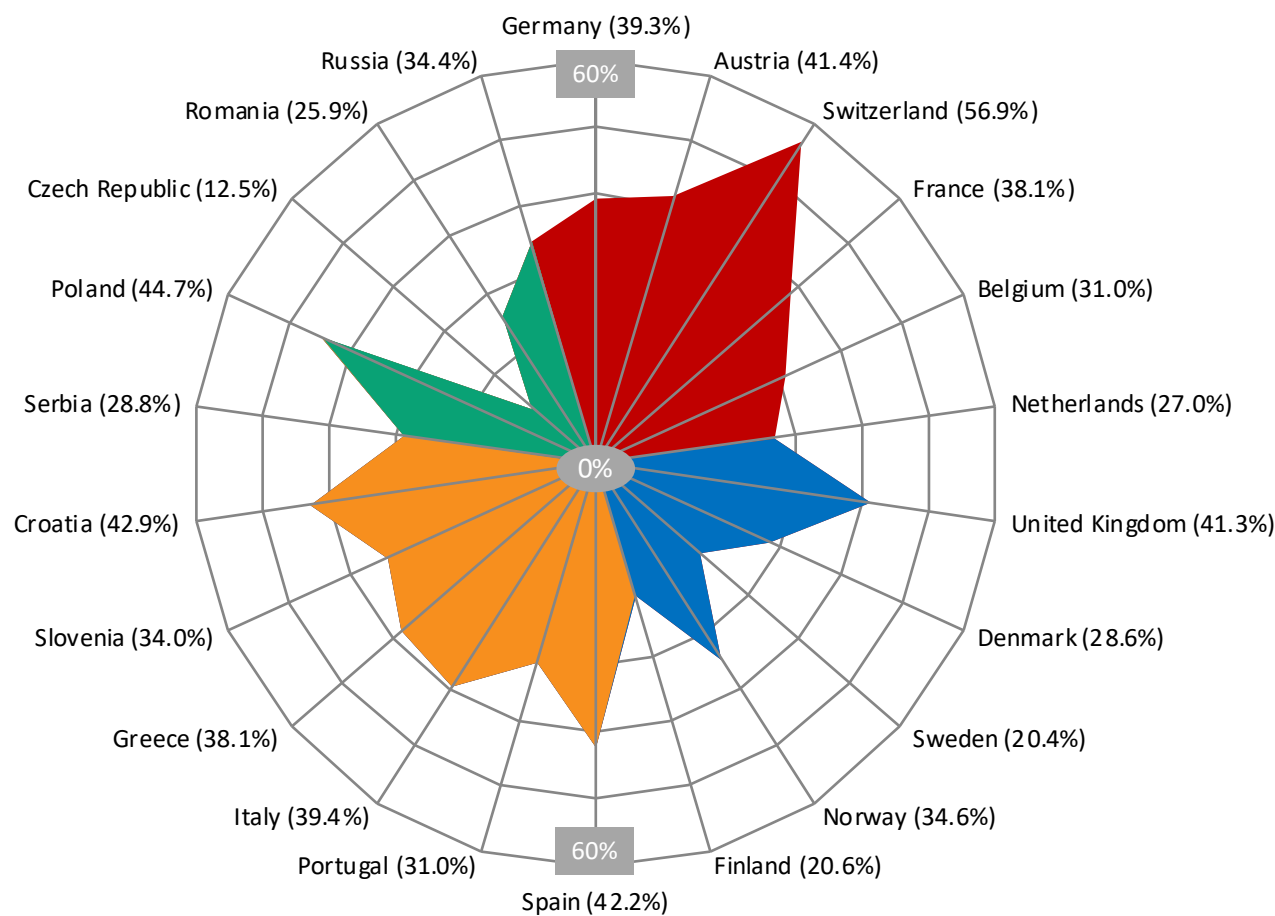
Every third female communication practitioner in Europe states that she is personally affected by an invisible barrier keeping her from rising to another career level

The glass ceiling problem affects me personally



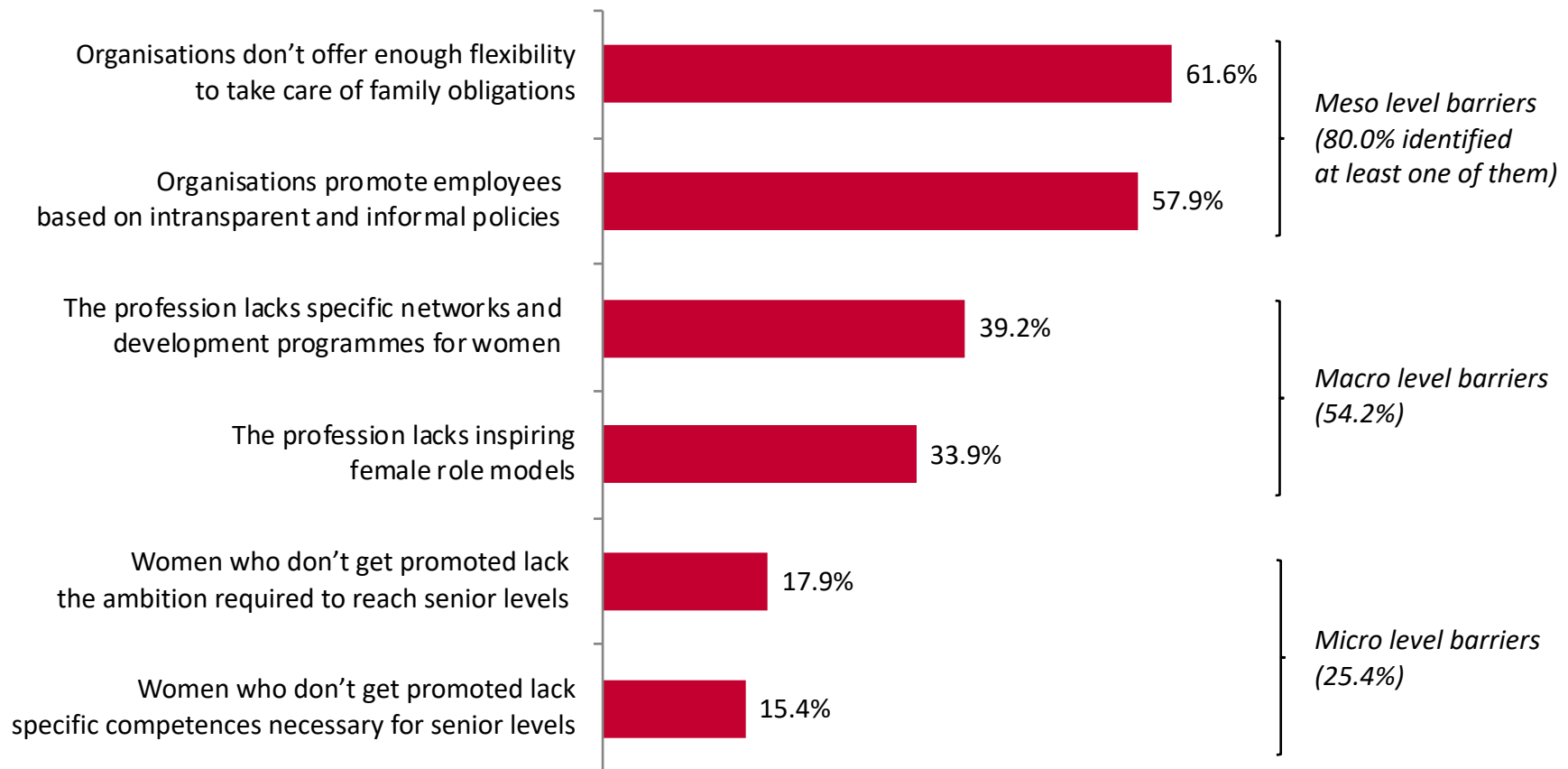
The personal impact of the glass ceiling problem is assessed quite differently across Europe

The glass ceiling problem affects me personally



Factors hindering women from reaching top positions in communications: Organisational barriers are most important

Reasons for the glass ceiling in the communications profession



Assessment of reasons for the glass ceiling problem in Western/Northern Europe

	Women who don't get promoted lack specific competences necessary for senior levels	Women who don't get promoted lack the ambition required to reach senior levels	Organisations promote employees based on intransparent and informal policies	Organisations don't offer enough flexibility to take care of family obligations	The profession lacks specific networks and development programmes for women	The profession lacks inspiring female role models
Germany	13.3%	12.4%	62.9%	63.8%	30.5%	28.6%
Austria	17.7%	32.9%	68.4%	77.2%	50.6%	40.5%
Switzerland	9.1%	18.2%	58.2%	69.1%	45.5%	41.8%
France	8.7%	4.3%	52.2%	43.5%	34.8%	39.1%
Belgium	11.4%	11.4%	54.5%	54.5%	36.4%	31.8%
Netherlands	6.5%	8.7%	69.6%	45.7%	37.0%	30.4%
United Kingdom	7.7%	7.7%	75.0%	63.5%	25.0%	26.9%
Denmark	0.0%	10.0%	50.0%	50.0%	40.0%	60.0%
Sweden	8.3%	4.2%	54.2%	33.3%	25.0%	29.2%
Norway	5.9%	17.6%	67.6%	29.4%	50.0%	20.6%
Finland	10.7%	14.3%	60.7%	42.9%	35.7%	25.0%

www.communicationmonitor.eu / Zerfass et al. 2020 / n = 962 communication professionals from 22 countries. Q 10: What are the factors that hinder women from reaching top positions in strategic communication and public relations in your country? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequency based on scale points 4-5.

Assessment of reasons for the glass ceiling problem in Southern/Eastern Europe

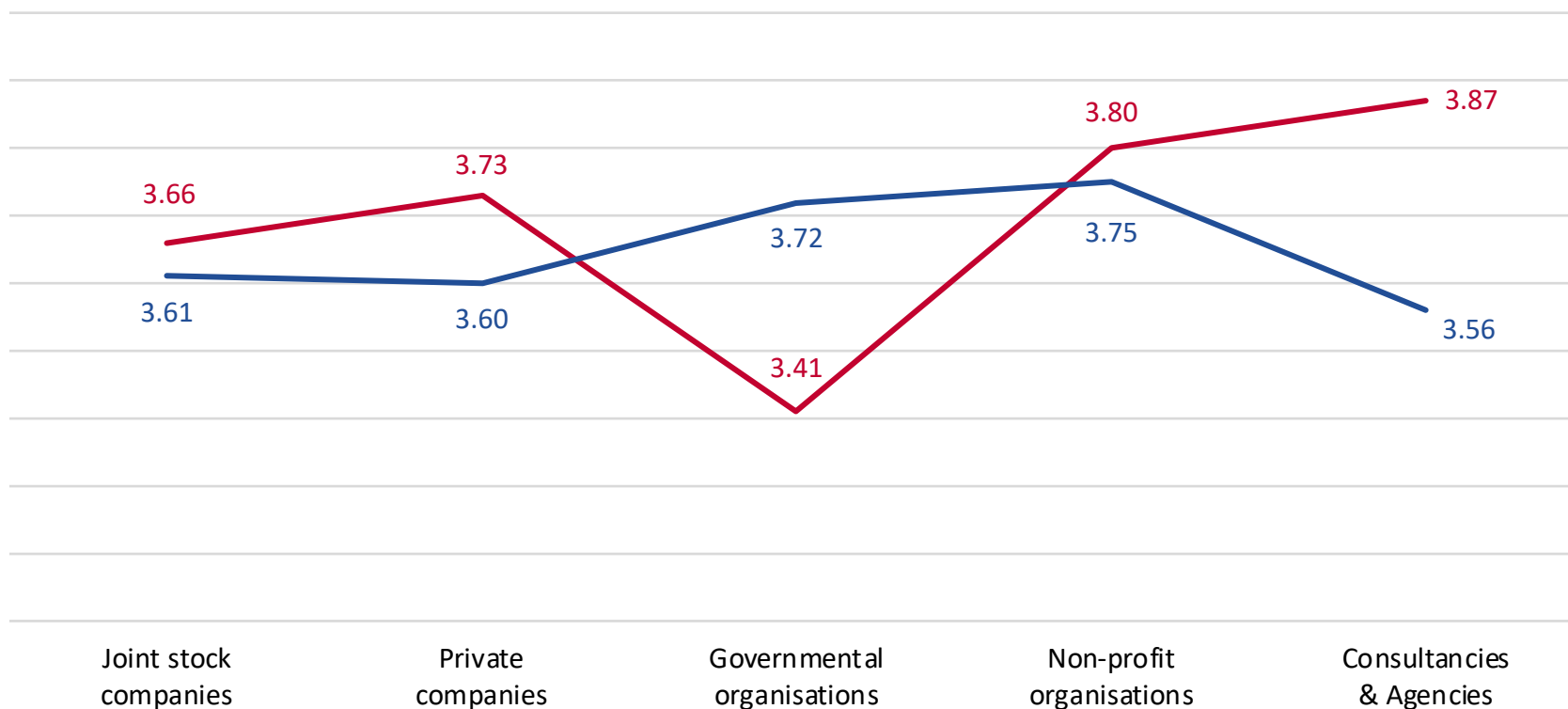
	Women who don't get promoted lack specific competences necessary for senior levels	Women who don't get promoted lack the ambition required to reach senior levels	Organisations promote employees based on intransparent and informal policies	Organisations don't offer enough flexibility to take care of family obligations	The profession lacks specific networks and development programmes for women	The profession lacks inspiring female role models
Spain	15.8%	26.3%	59.6%	73.7%	43.9%	36.8%
Portugal	11.1%	11.1%	64.4%	60.0%	40.0%	26.7%
Italy	10.1%	17.4%	56.5%	75.4%	50.7%	42.0%
Greece	17.6%	11.8%	52.9%	70.6%	47.1%	29.4%
Slovenia	16.7%	16.7%	41.7%	61.1%	27.8%	30.6%
Croatia	15.9%	9.1%	65.9%	59.1%	38.6%	36.4%
Serbia	22.5%	22.5%	52.5%	75.0%	42.5%	42.5%
Poland	13.3%	10.0%	63.3%	63.3%	26.7%	46.7%
Czech Republic	21.4%	42.9%	50.0%	64.3%	35.7%	42.9%
Romania	29.5%	26.1%	35.2%	59.1%	43.2%	30.7%
Russia	36.4%	40.9%	59.1%	59.1%	36.4%	36.4%

www.communicationmonitor.eu / Zeffass et al. 2020 / n = 962 communication professionals from 22 countries. Q 10: What are the factors that hinder women from reaching top positions in strategic communication and public relations in your country? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequency based on scale points 4-5.

Governmental organisations offer more flexibility than companies and agencies, but they are equally intransparent and informal in their promotion policies

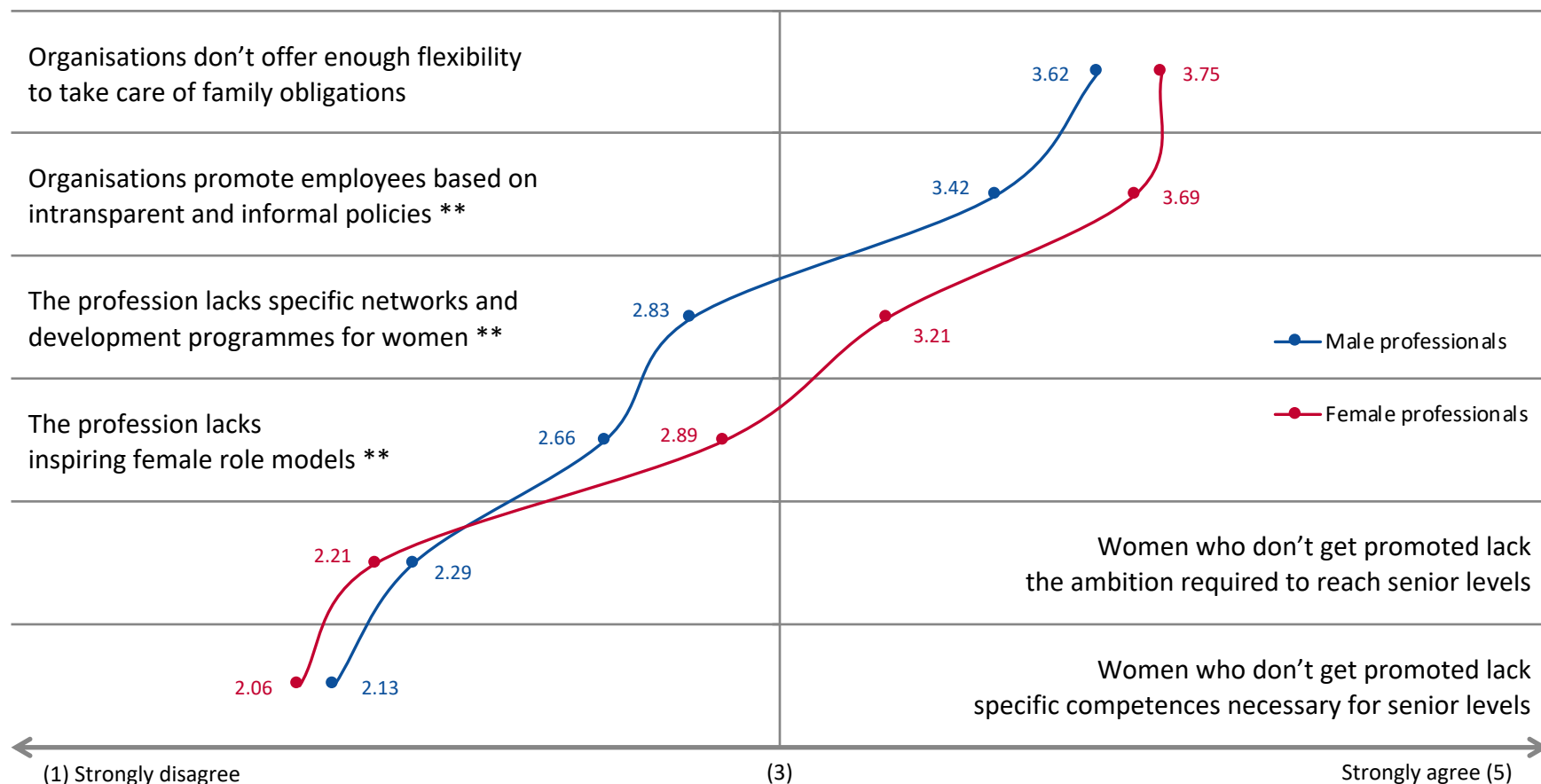
Organisational factors which hinder women from reaching top positions in communications

- Organisations don't offer enough flexibility to take care of family obligations **
- Organisations promote employees based on intransparent and informal policies



Female practitioners report stronger barriers on the organisational and professional level, while men blame individual characteristics of women more often

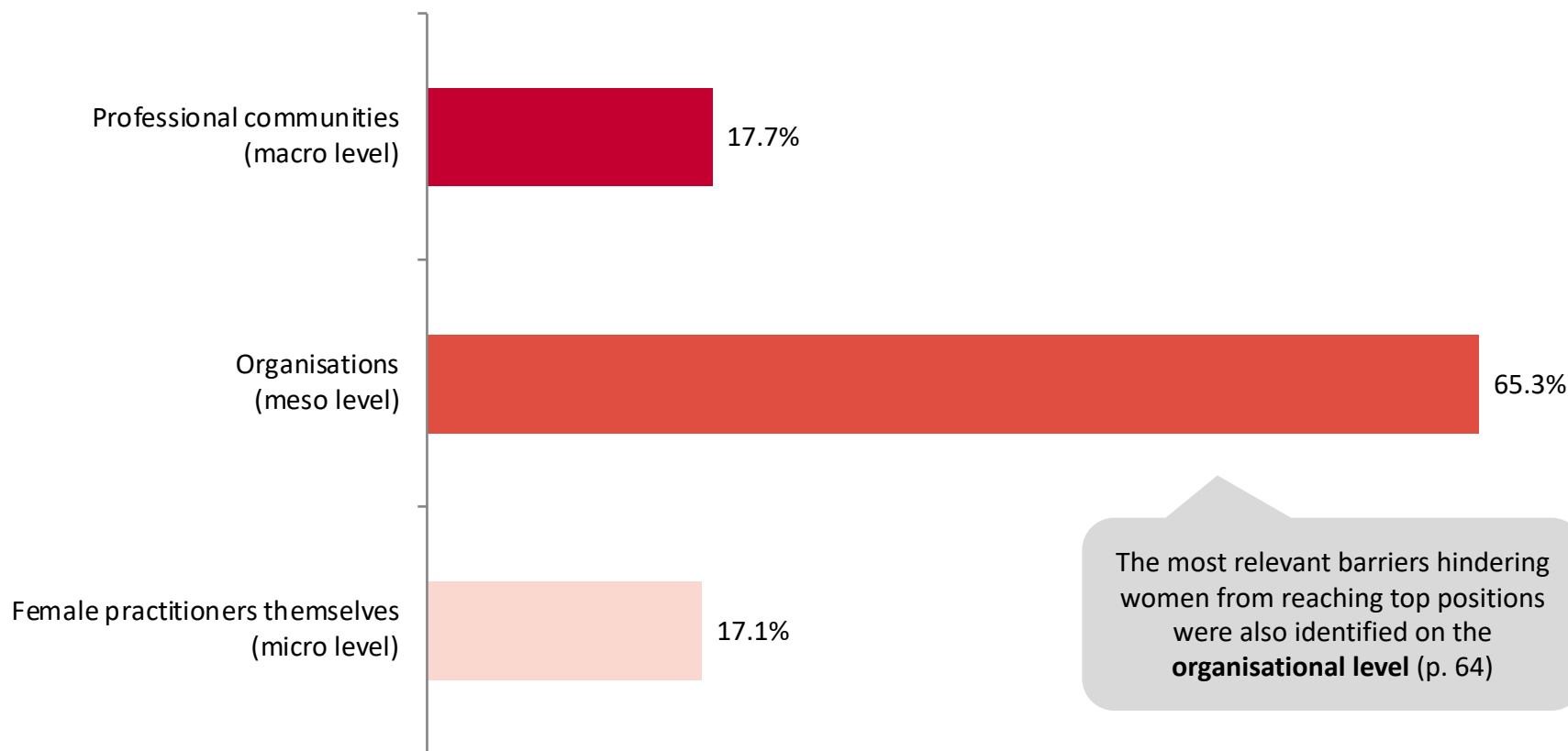
Factors assumed to hinder women from reaching top positions in communications



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 1,083 communication professionals. Q 10: What are the factors that hinder women from reaching top positions in strategic communication and public relations in your country? Scale 1 (Strongly disagree) – 5 (Strongly agree). Mean values. ** Highly significant differences (ANOVA, $p \leq 0.01$). * Significant differences (ANOVA, $p \leq 0.05$).

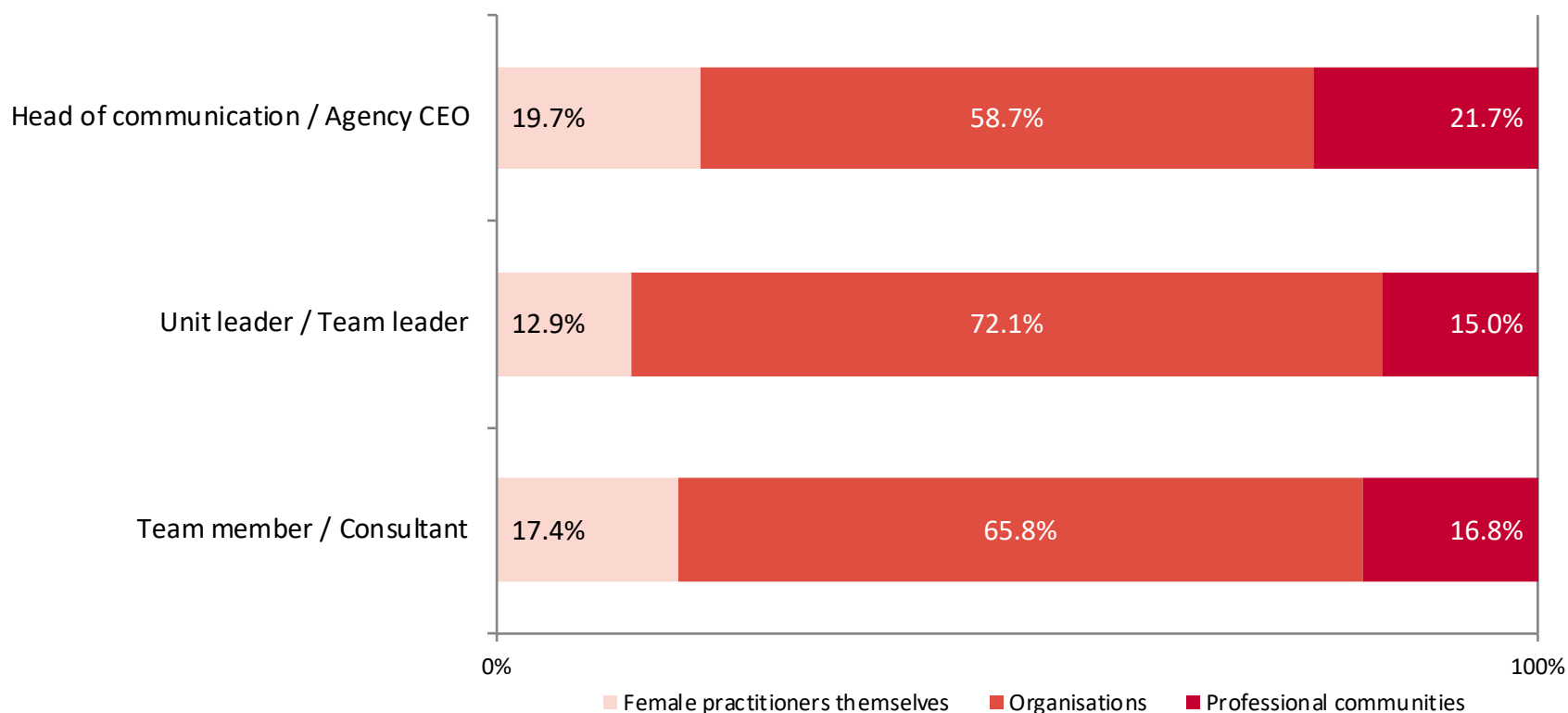
Overcoming the glass ceiling in communications: A clear majority of European practitioners believe that organisations have the greatest influence on the issue

Agents assumed to be most capable to change the current situation of women in communications



Communication leaders stress the self-responsibility of female practitioners and the stewardship of professional associations more often

Agents assumed to be most capable to change the current situation of women in communications



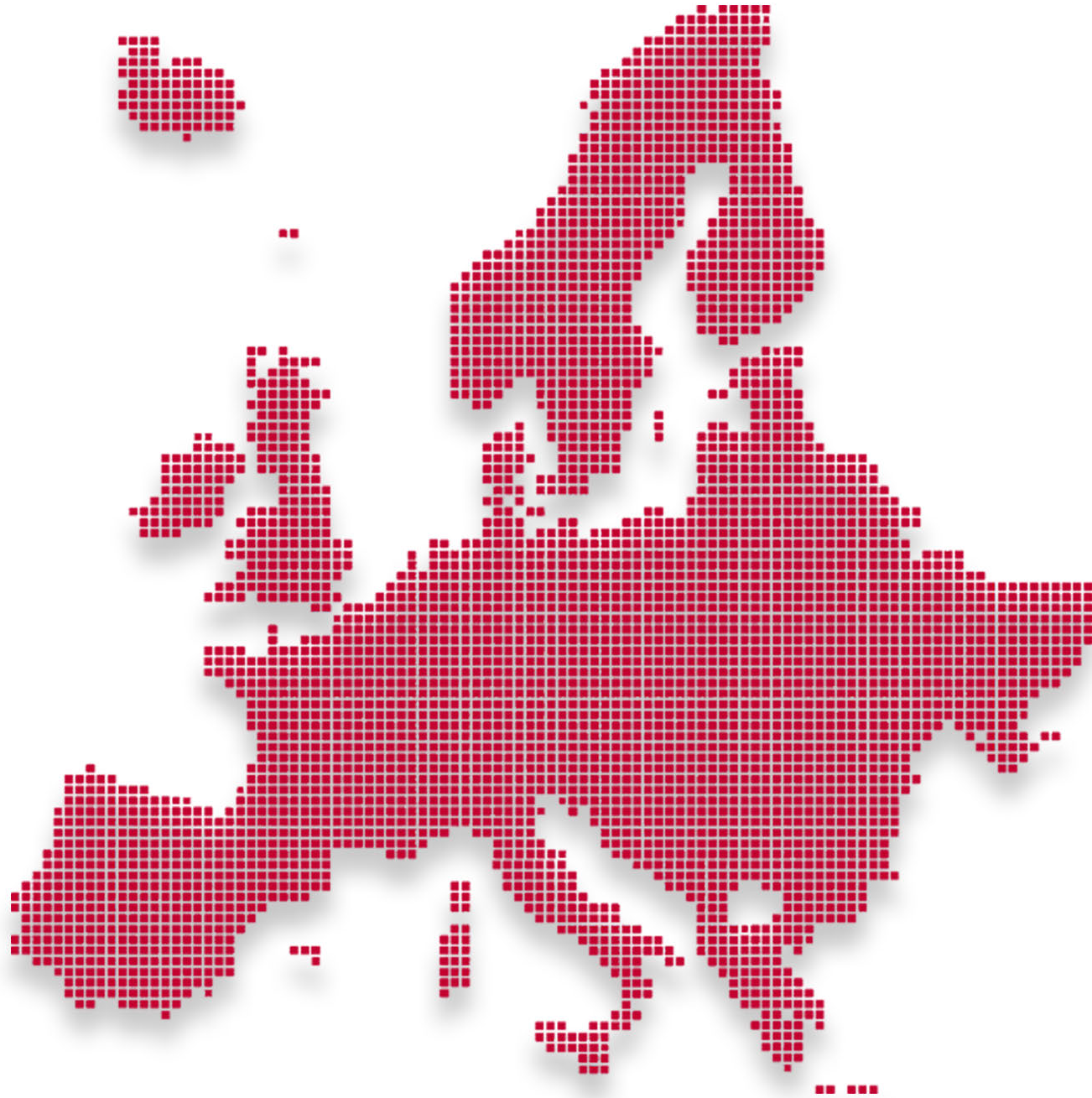
www.communicationmonitor.eu / Zerfass et al. 2020 / n = 1,049 communication professionals. Q 11: And who do you think is most capable of changing the current situation of women in communications? Female practitioners themselves (e.g. by enhancing their competencies and motivation) / Organisations (e.g. by changing structures and cultures) / Professional communities (e.g. by uniting and supporting female practitioners). Highly significant differences between hierarchical levels (chi-square test, $p \leq 0.01$).

Perceived capability of different agents to break the glass ceiling in Europe

	Professional communities (macro level)	Organisations (meso level)	Female practitioners themselves (micro level)		Professional communities (macro level)	Organisations (meso level)	Female practitioners themselves (micro level)
Germany	8.4%	72.9%	18.7%	Spain	12.1%	75.9%	12.1%
Austria	7.5%	78.8%	13.8%	Portugal	15.6%	73.3%	11.1%
Switzerland	3.6%	85.7%	10.7%	Italy	22.9%	65.7%	11.4%
France	21.7%	69.6%	8.7%	Greece	16.7%	66.7%	16.7%
Belgium	22.9%	64.6%	12.5%	Slovenia	21.6%	56.8%	21.6%
Netherlands	16.3%	67.3%	16.3%	Croatia	11.4%	61.4%	27.3%
United Kingdom	18.2%	76.4%	5.5%	Serbia	34.1%	43.9%	22.0%
Denmark	30.0%	40.0%	30.0%	Poland	6.3%	62.5%	31.3%
Sweden	4.0%	88.0%	8.0%	Czech Republic	0.0%	57.1%	42.9%
Norway	28.6%	60.0%	11.4%	Romania	26.7%	48.9%	24.4%
Finland	14.3%	82.1%	3.6%	Russia	24.0%	44.0%	32.0%

www.communicationmonitor.eu / Zerfass et al. 2020 / n = 990 communication professionals from 22 countries. Q 11: And who do you think is most capable of changing the current situation of women in communications? Female practitioners themselves (e.g. by enhancing their competencies and motivation) / Organisations (e.g. by changing structures and cultures) / Professional communities (e.g. by uniting and supporting female practitioners).

Strategic issues
and communication
channels



Strategic issues and communication channels

In 2018 building and maintaining trust became the most important strategic issue for the communication profession (Zerfass et al., 2018) and it remains in the top spot in the European Communication Monitor for the third consecutive year. 41.6 per cent of respondents believe that it will stay at that position for the next three years. This topic is disproportionally strong for governmental organisations in which 49.2 per cent of communicators see trust as the most relevant issue for the near future. In second position among all practitioners is dealing with sustainable development and social responsibility (37.5 per cent). The third most important issue is dealing with the speed and volume of information flow (34.9 per cent). It is interesting to note that dealing with sustainable development and social responsibility is much more relevant for non-profits (43.6 per cent) and companies (40.0 per cent) than for governmental organisations (32.4 per cent).

A longitudinal analysis from 2007 (Zerfass et al., 2007) to 2020 shows a turbulent sea of waves with issues changing their positions through the years: while coping with digital evolution and the social web was at an all time high at 54.9 per cent in 2011, it is at less than half of that value in 2020. Dealing with sustainable development and social responsibility has been high and in second position in 2008 (just before the financial crisis really hit) at 41.3 per cent, it fell to only 15.4 per cent in 2016, to start rising in 2017 to return back to the second spot in 2020 again at 37.5 per cent. This shows that communicators have learnt to deal with many issues, but they may rise again.

When asked about their perception of the importance of different communication channels and instruments for addressing stakeholders, gatekeeper and audiences in 2020 (and comparing with future expectations for 2023), practitioners put social media and social networks at the top (by 87.6 per cent), followed by online communication via web-sites, e-mails and intranets (82.1 per cent), face-to-face communication (82.1 per cent), spreading news via online mass media (80.0 per cent), and mobile communication (phone/ tablet apps, mobile websites) named by 75.3 per cent. The biggest winner in the next three years should be mobile communication (85.7 per cent of respondents believe in a high importance then), while the biggest loser is media relations with print newspapers/magazines (with a drop of 23.7 points – while 55.2 per cent of practitioners rate this instrument important nowadays, only 31.5 per cent predict this for 2023).

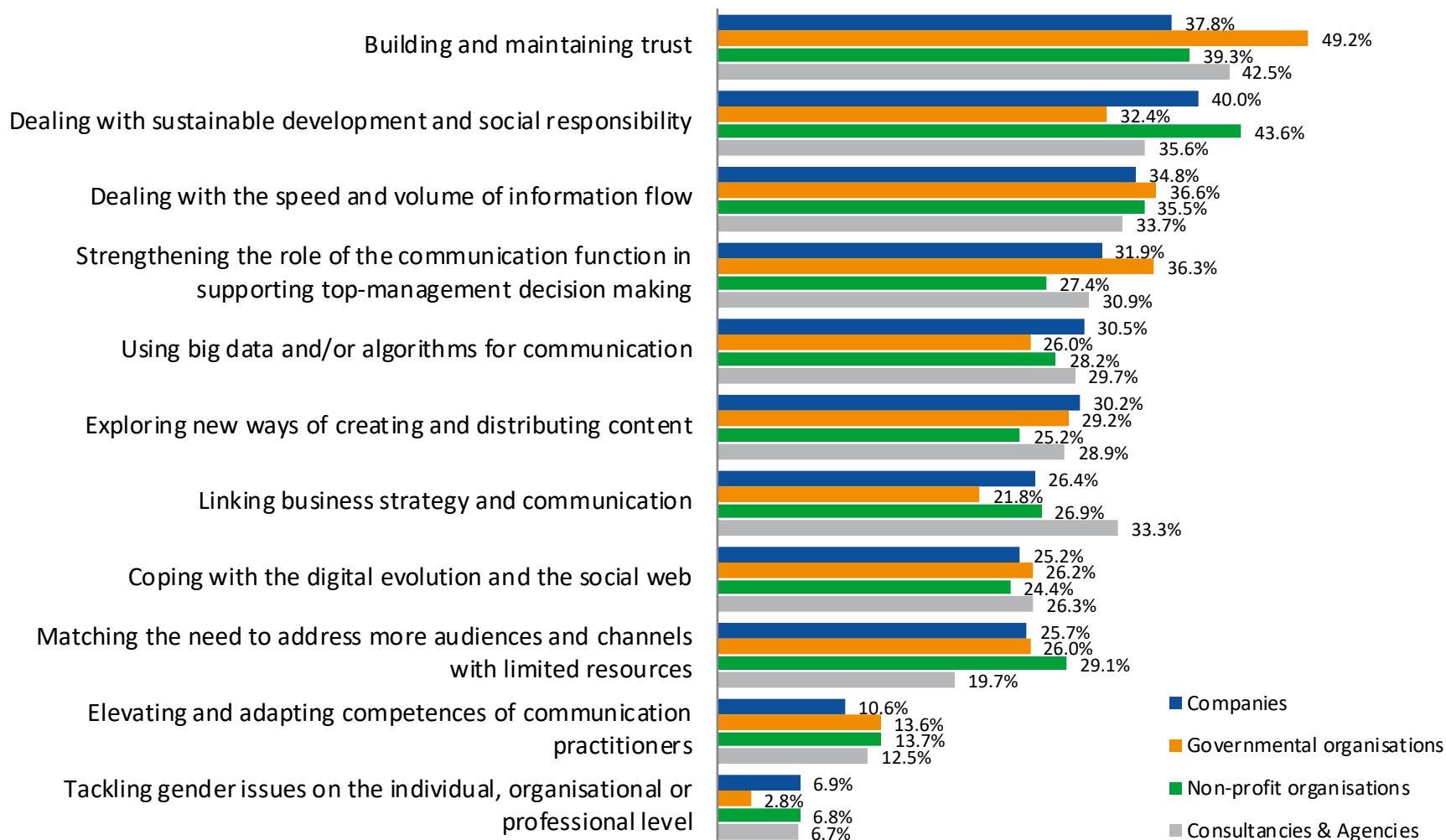
Looking at trends from 2007 to 2020, we can see that social media and social networks have clearly gained in importance (from little over 10 per cent in 2007 to nearly 90 per cent in 2020), while using traditional mass media as intermediaries is losing in relevance. If we look back to predictions practitioners gave three years ago and what actually is happening today, we can see that social media were rightly predicted to be very high (by 93.1 per cent), slightly higher than they are assessed today (87.6 per cent). Face-to-face communication was expected to be lower (by 5.7 per cent) than it is rated today (82.1 per cent). Mobile communication, however, did not gain as much importance as expected – this has to be taken into account when interpreting the current positive predictions for this channel.

Nevertheless, it is important to note that the ECM 2020 survey was executed just before COVID-19 locked practically the whole of Europe down and moved the majority of administrative, creative and managerial work to digital platforms and pushed the O2O economy (on-line to off-line; see Xiao & Dong, 2015) into the centre of urban survival in Europe. Effects on digital and mobile communications are inevitable, and the real impact has to be measured in the next monitor studies.

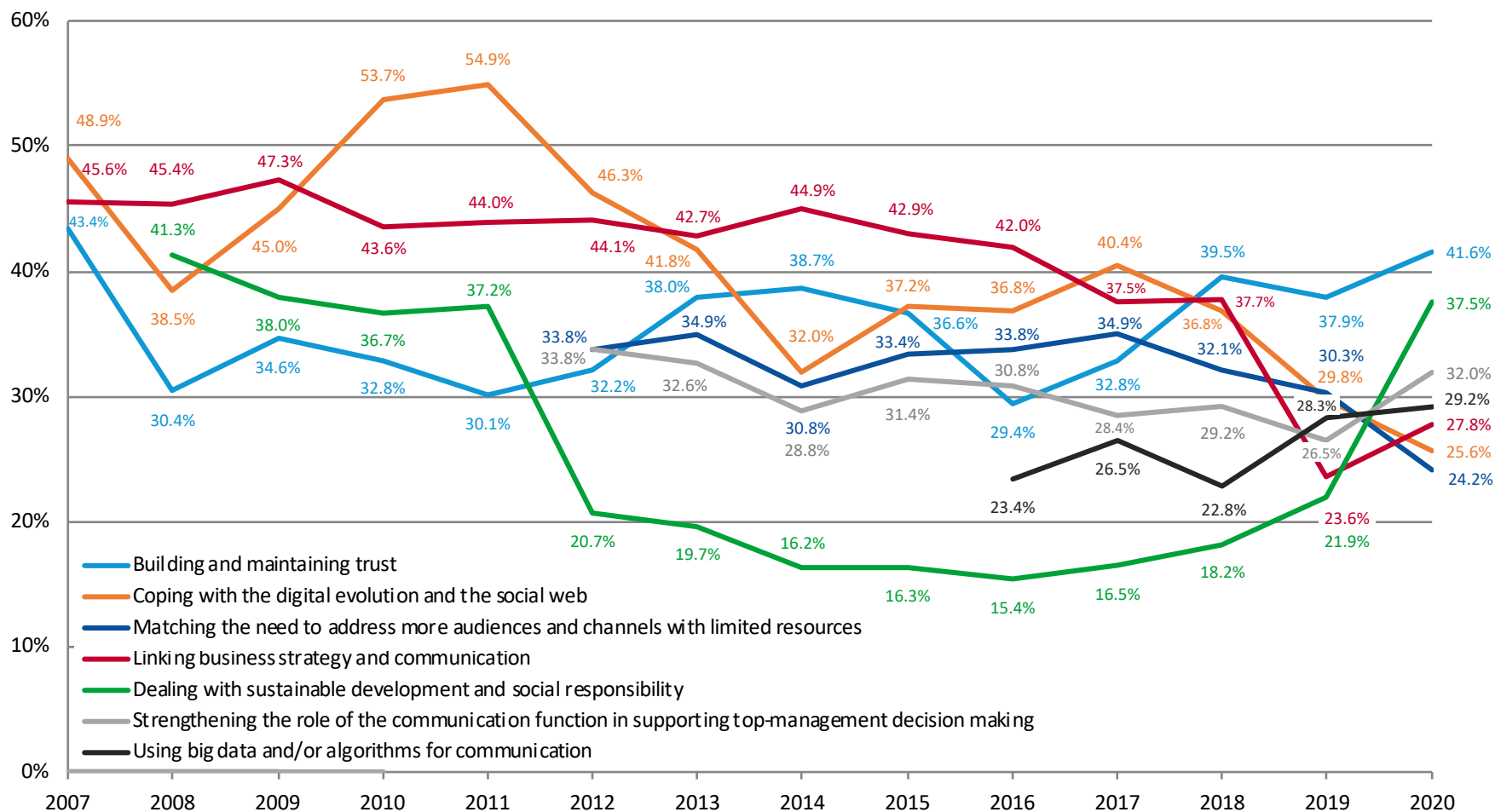
Most important strategic issues for communication management until 2023



Relevance of strategic issues differs between types of organisations



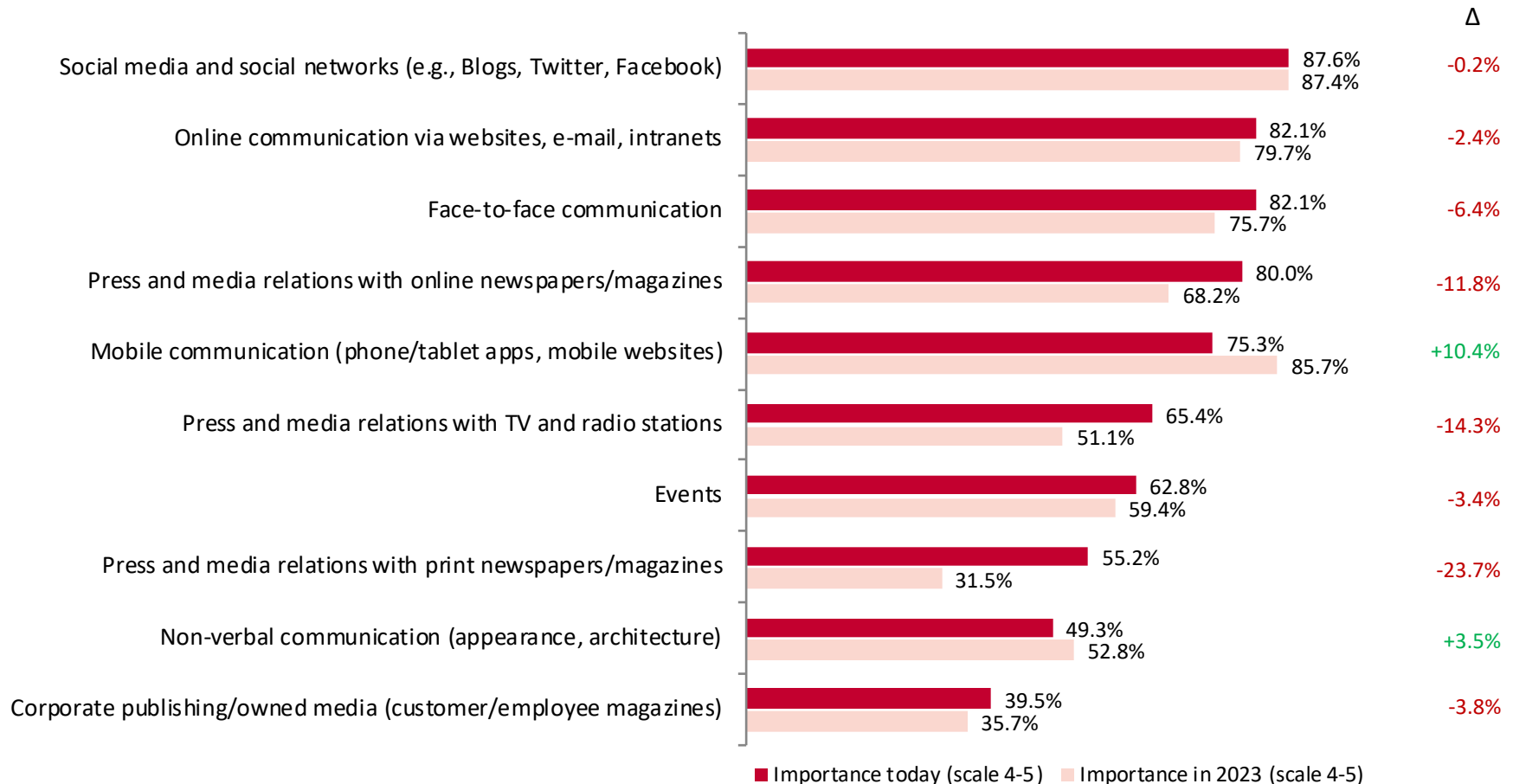
Long-term development of strategic issues for communication management



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,324 communication professionals (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? Please pick exactly 3 items. Percentages: Frequency based on selection as Top-3 issue.

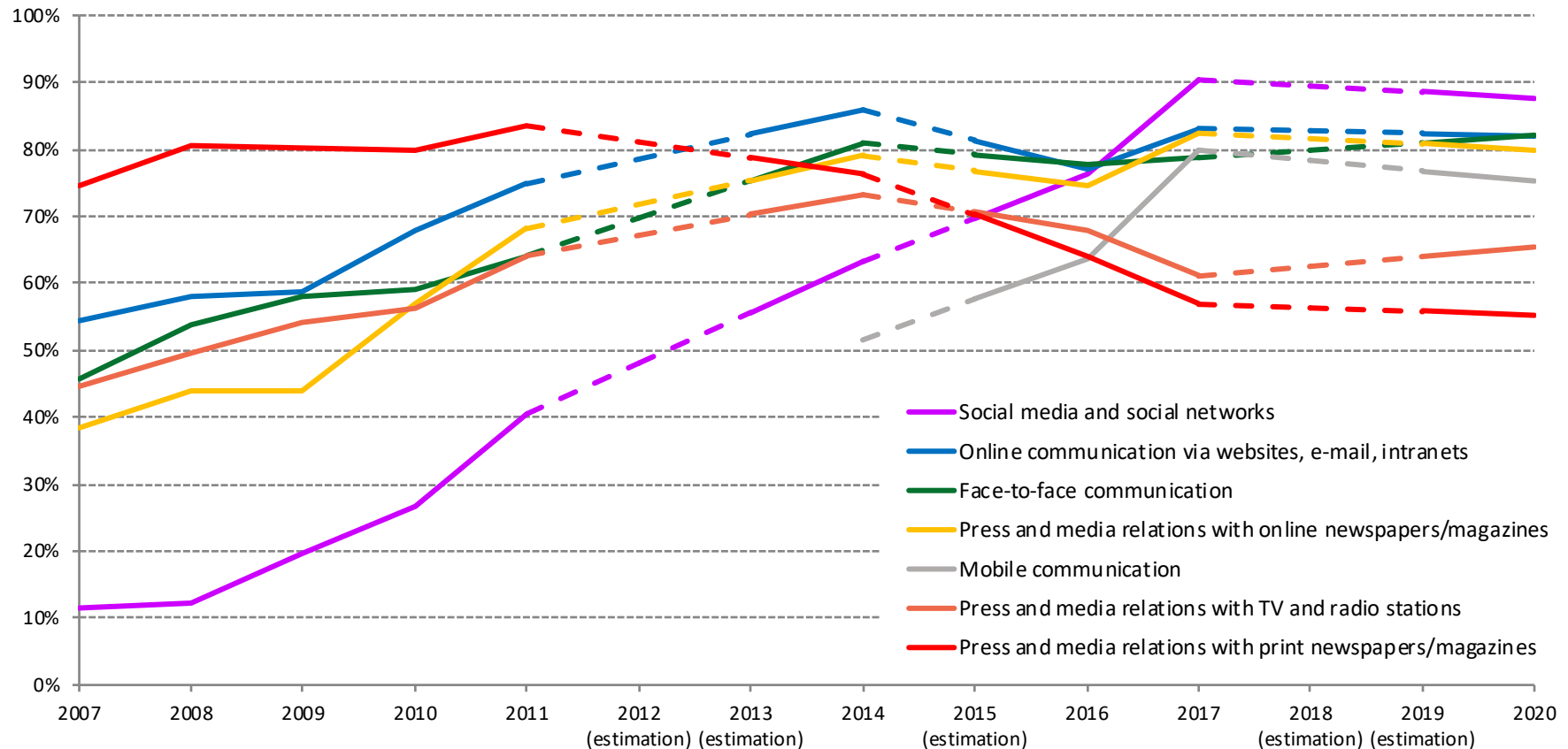
Importance of communication channels and instruments today and in the future: Mobile communication is advancing fast; media relations is on the downturn

Perceived importance for addressing stakeholders, gatekeepers and audiences in 2020 and in 2023



Longitudinal analysis: Social media and social networks have clearly gained in importance, while media relations with print, TV, and radio outlets are declining

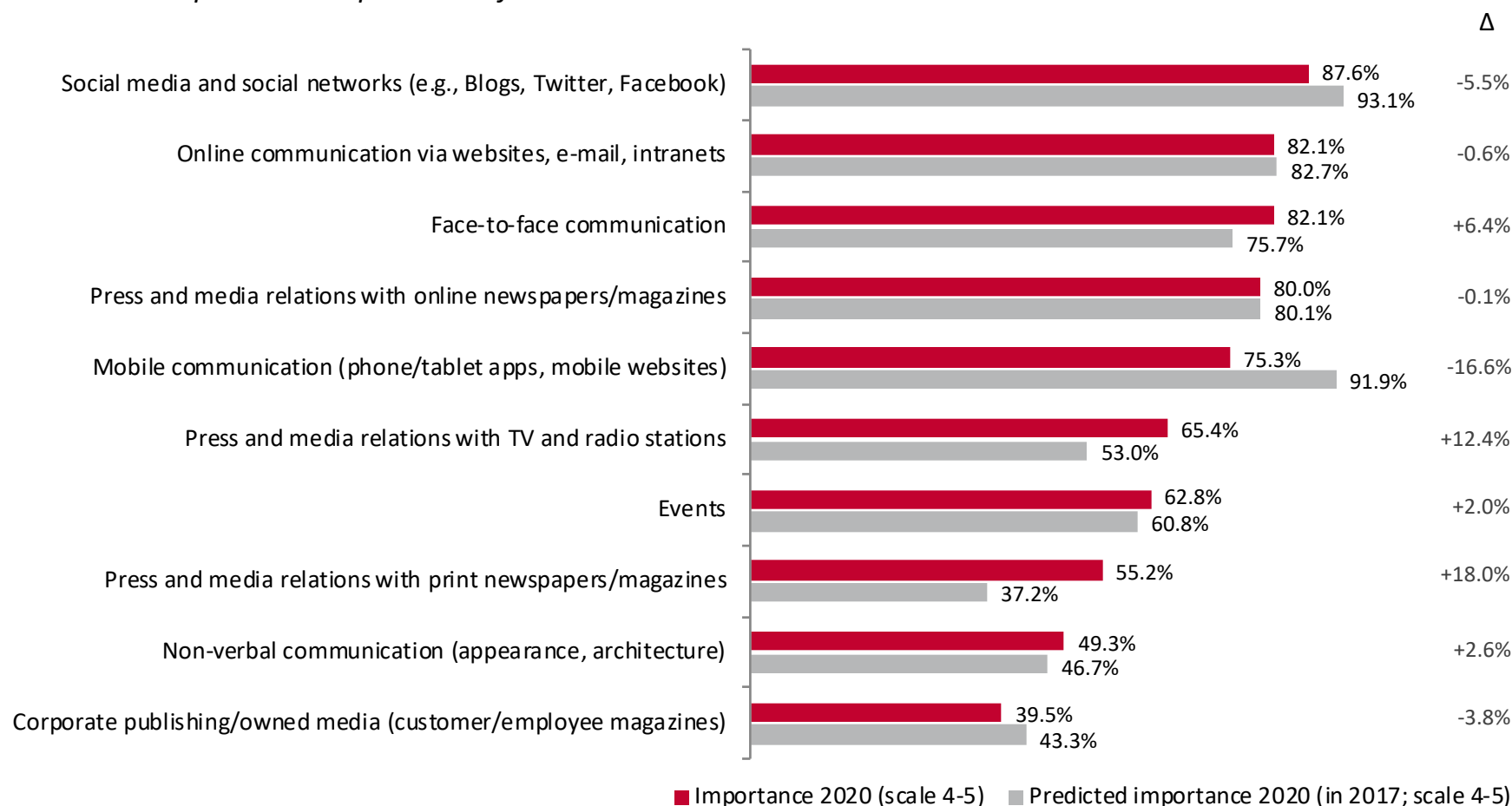
Perceived importance of communication channels for addressing stakeholders, gatekeepers and audiences



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,286 communication professionals (Q 16); Zerfass et al. 2017 / n = 3,268 (Q6); Zerfass et al. 2016 / n = 2,583 (Q 12); Zerfass et al. 2014 / n = 2,666 (Q 24); Zerfass et al. 2011 / n = 2,125 (Q 11); Zerfass et al. 2010 / n = 1,900 (Q 6); Zerfass et al. 2009 / n = 1,806 (Q 5); Zerfass et al. 2008 / n = 1,542 (Q 3); Zerfass et al. 2007 / n = 1,087 (Q 4). Q: You are almost done – one last question before we move on to the background and socio-demographics! How important are the following methods in addressing stakeholders, gatekeepers and audiences today? In your opinion, how important will they be in three years? Scale 1 (Not important) – 5 (Very important). Frequency based on scale points 4-5. Estimation = No data collected in these years; figure shows extrapolated values.

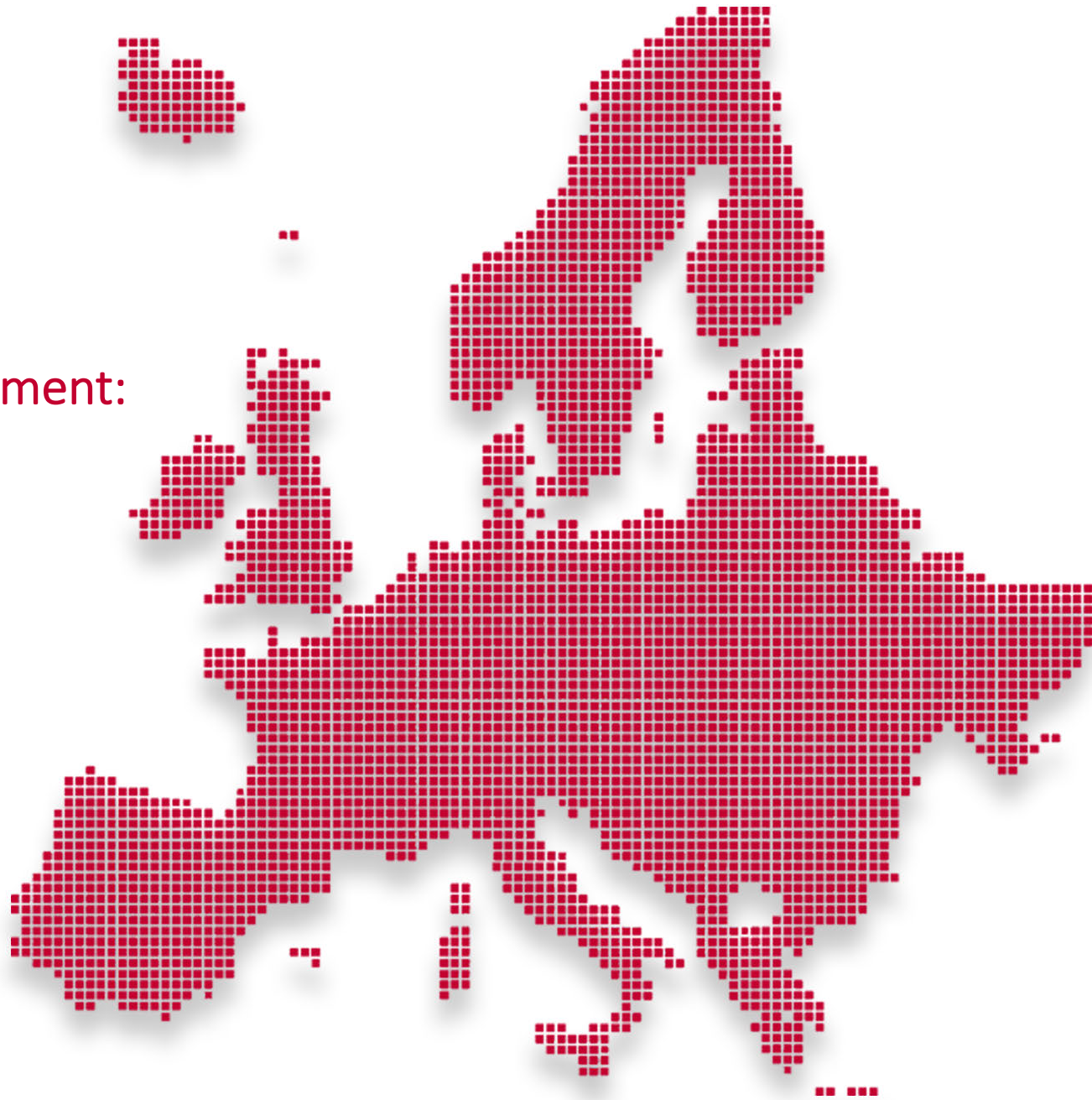
However, the shift towards social media and online communication has not been as strong as estimated in previous studies – and press relations is still better off

Perceived and predicted importance of communication channels and instruments in 2020



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,286 communication professionals (Q 16); Zerfass et al. 2017 / n = 3,239 (Q6). Q: You are almost done – one last question before we move on to the background and socio-demographics! How important are the following methods in addressing stakeholders, gatekeepers and audiences today? In your opinion, how important will they be in three years? Scale 1 (Not important) – 5 (Very important). Frequency based on scale points 4-5.

Competency development:
Status quo and
future needs



Competency development: Status quo and future needs

Skills, knowledge and personal attributes lead to broader competencies which have been identified as drivers of success for communication departments (Tench et al., 2017b; Tench & Moreno, 2015). For communication professionals, competencies are the foundational abilities that are both specific to communication such as data handling and those that are relevant to organisational success more generally, such as management skills (Jeffrey & Brunton, 2011; Tench & Topić, 2018).

Almost half of respondents (43.3 per cent) in this study agree that competencies are intensively discussed in their country, highlighting their importance to communicators across the continent. Reflecting this, most practitioners (80.9 per cent) believe in the need for constant improvement. But the importance of building competencies varies by experience and location. Experienced communication professionals are more aware of the need to develop competences, whilst one quarter of practitioners in their 20s report only little or moderate need for competency development. The awareness for competency development is strongest in Western and Northern Europe.

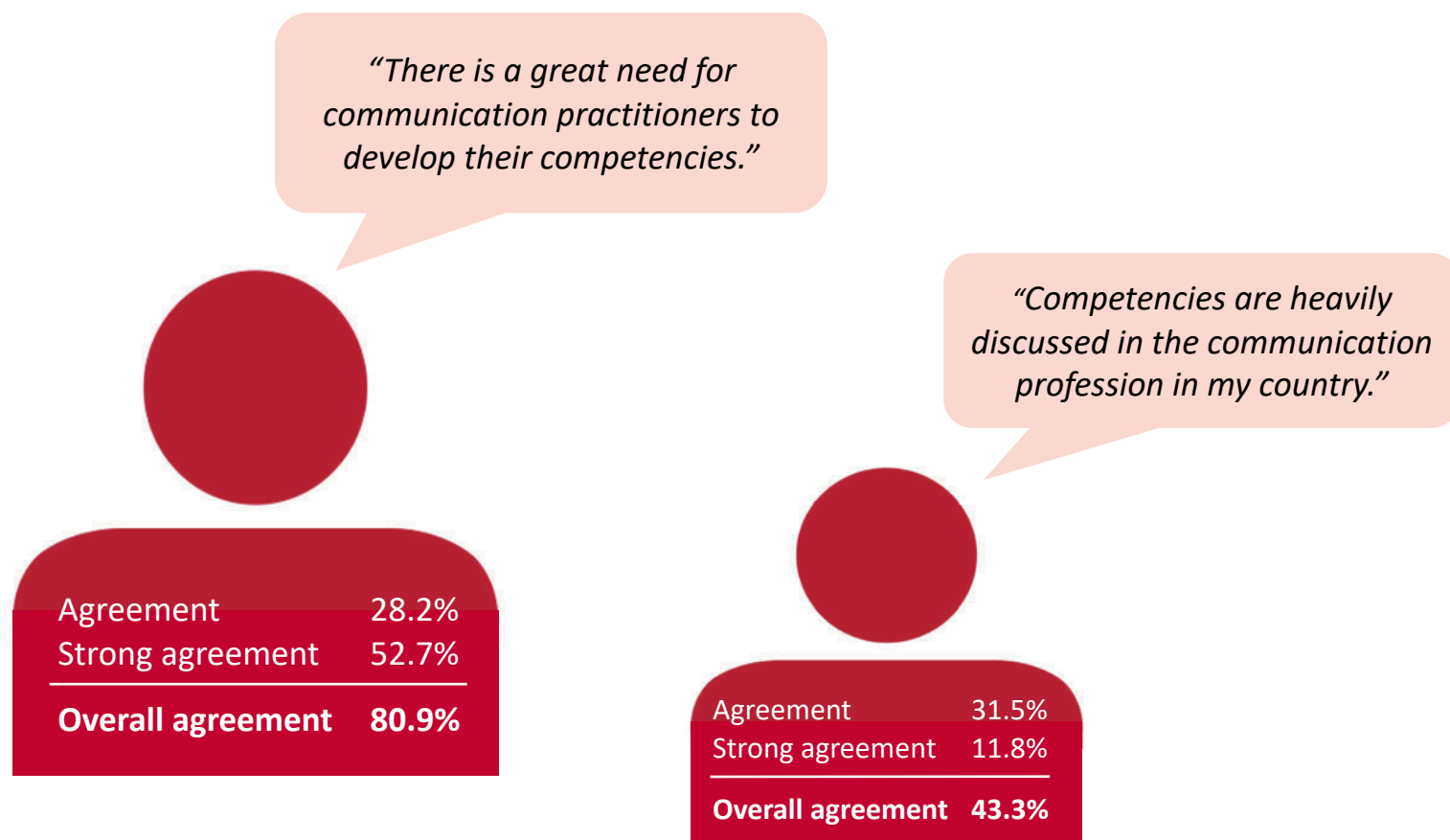
The need for development in communication is assessed similarly across all ranks. However, there are discrepancies between perceived importance of competencies and current qualification level of individuals. For instance, 68.5 per cent of practitioners report that technological competence is important, but only 50.6 per cent report a highly developed competence in this area. Despite data handling being an important skill for all communicators, a lack of data competencies is particularly striking across all levels, with 50.6 per cent of communicators in Europe under-skilled in this key area.

Communication leaders are skilled in business, management and communication skills, exceeding their subordinates across these areas. Younger professionals report the greatest skill in handling technology. Gender disparities in competencies exist, with female practitioners confident in their communication and management competencies, whilst male practitioners rate their business and technology skills significantly higher.

Competencies vary between organisation type. Practitioners working in governmental organisations and non-profits rate their business competencies significantly lower than those working in other sectors. Online communicators have the highest technology and data competencies of all practitioners, but lack business skills compared to those working in other areas.

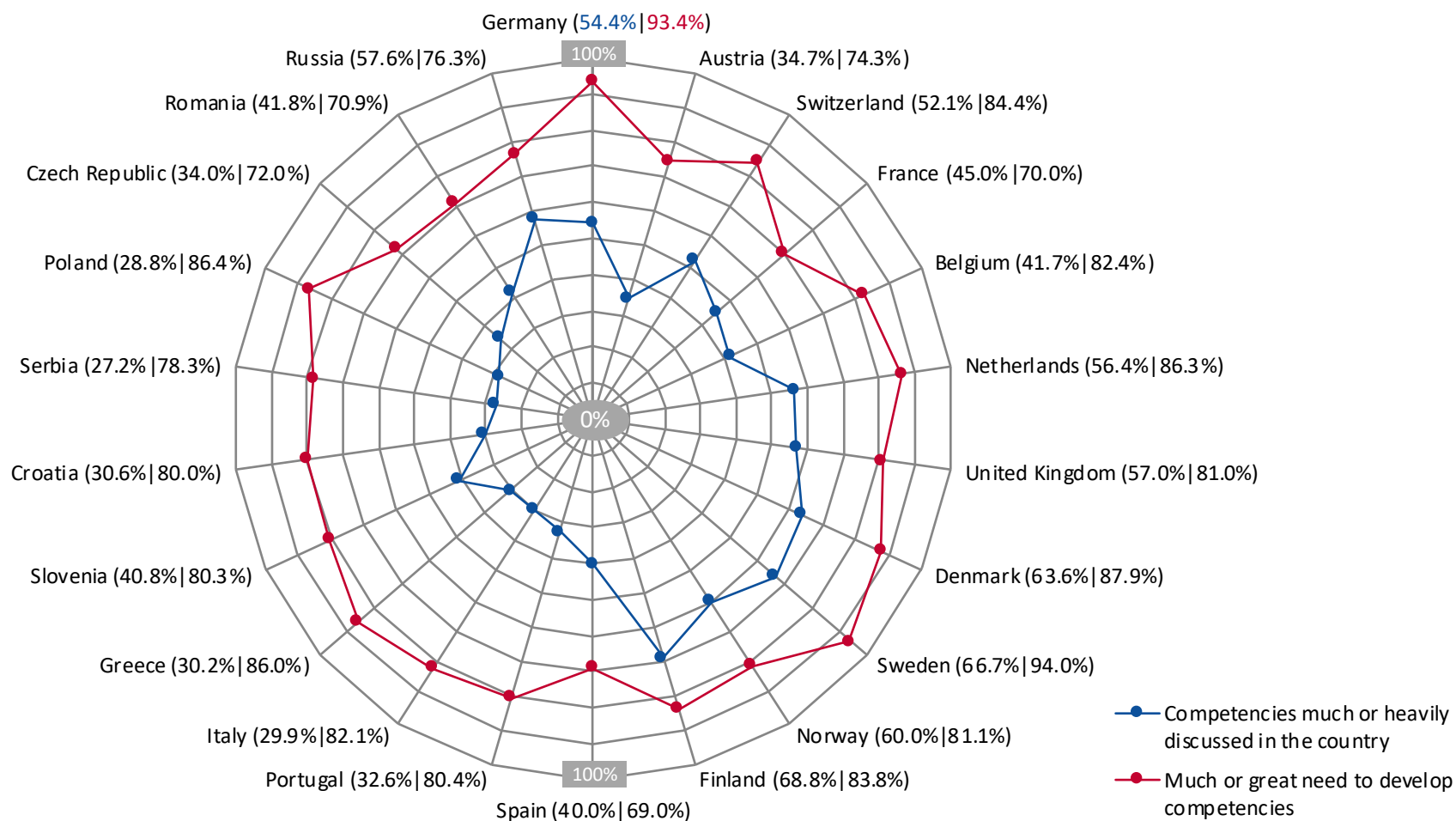
Closing competence gaps correlate with the educational efforts of communication practitioners, thus time spent training is an important consideration (Moreno et al., 2017). Across Europe, communication professionals have completed an average of 19 training days per year in 2019, with 10 of those taking place in the practitioner's free time (weekends, holidays or evenings). Personal development time is greatest for those working in consultancies and agencies, but lowest amongst those working in joint stock companies. Differences exist between practitioner age groups, with younger professionals (29 years or younger) investing over eight weeks of work and leisure time in further study, compared to only two weeks for those between 40–49. In terms of who should be responsible for further competency development, most practitioners (84.4 per cent) report that individuals should invest in their own development, but many (82.9 per cent) plead for development programmes at the organisational level.

Competency development in the communications profession: Four out of five practitioners in Europe believe in the need for constant improvement



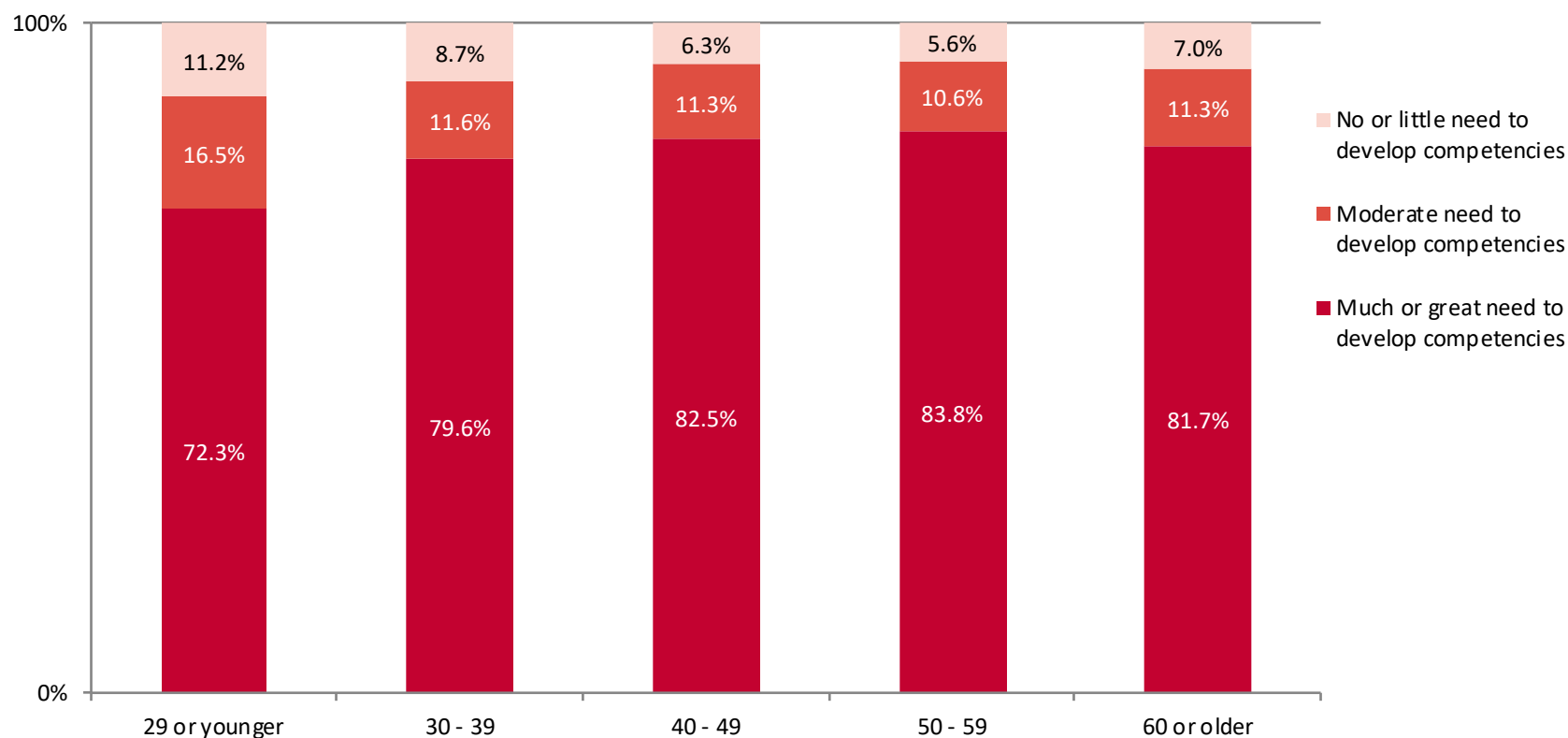
www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,324 communication professionals. Q 13: Practitioners working in strategic communication and public relations need a broad set of skills and knowledge to fulfill their tasks. How do you assess the current situation regarding competencies in communications? First scale 1 (Competencies are not at all discussed in the communication profession in my country) – 5 (Competencies are heavily discussed in the communication profession in my country); second scale 1 (There is no need at all for communication practitioners to develop their competencies) – 5 (There is a great need for communication practitioners to develop their competencies). Frequency based on scale points 4-5.

Competency development is more intensively discussed in Western and Northern Europe, but training needs are prevalent across the continent



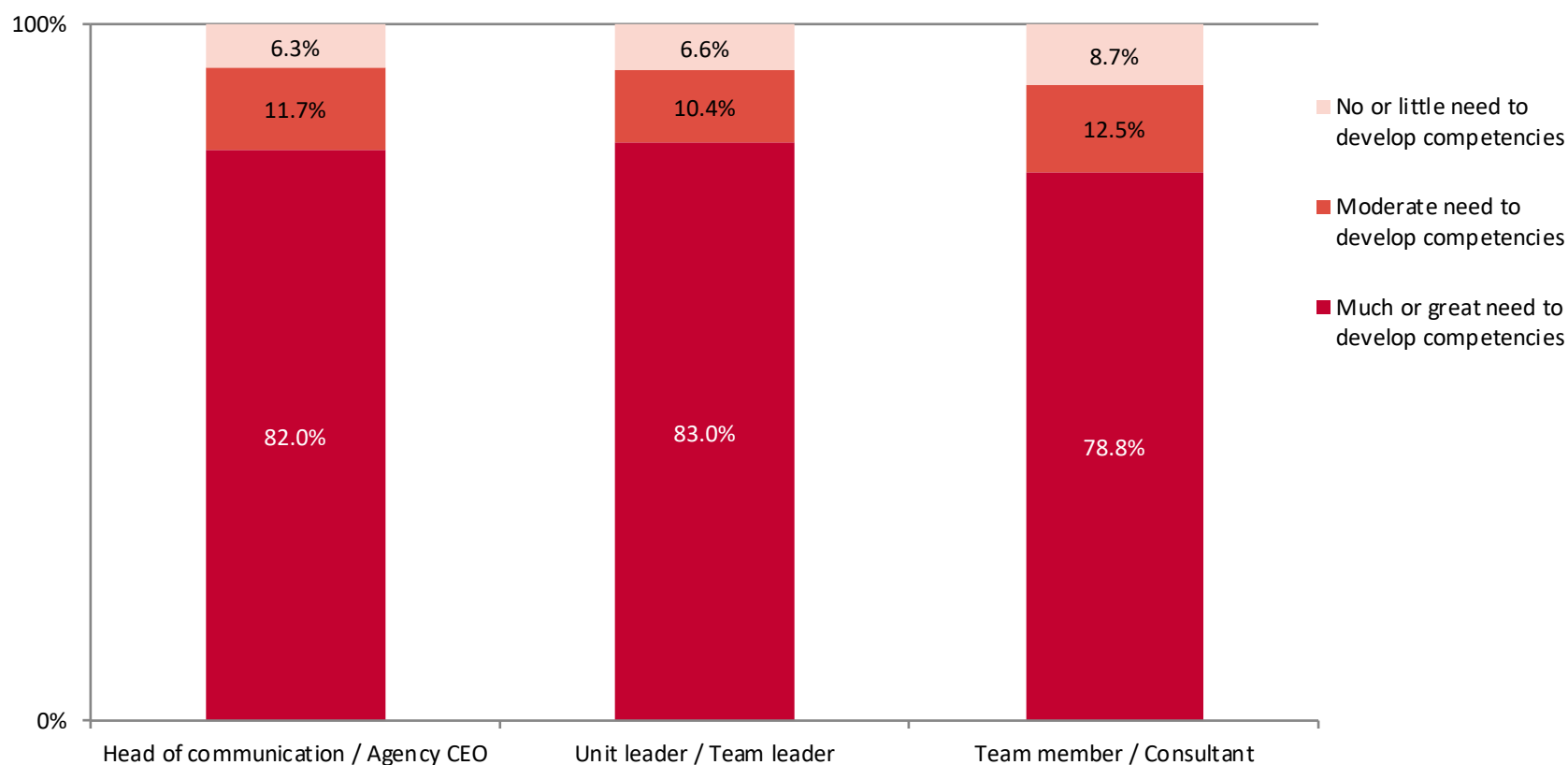
www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,048 communication professionals from 22 countries. Q 13: Practitioners working in strategic communication and public relations need a broad set of skills and knowledge to fulfill their tasks. How do you assess the current situation regarding competencies in communications? First scale 1 (Competencies are not at all discussed in the communication profession in my country) – 5 (Competencies are heavily discussed in the communication profession in my country); second scale 1 (There is no need at all for communication practitioners to develop their competencies) – 5 (There is a great need for communication practitioners to develop their competencies).

Seasoned communication professionals are more aware of the need to advance skills and knowledge – one quarter of practitioners in their 20s see no strong need



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,324 communication professionals. Q 13: Practitioners working in strategic communication and public relations need a broad set of skills and knowledge to fulfill their tasks. How do you assess the current situation regarding competencies in communications? First scale 1 (Competencies are not at all discussed in the communication profession in my country) – 5 (Competencies are heavily discussed in the communication profession in my country); second scale 1 (There is no need at all for communication practitioners to develop their competencies) – 5 (There is a great need for communication practitioners to develop their competencies). Highly significant differences between age groups (chi-square test, $p \leq 0.01$).

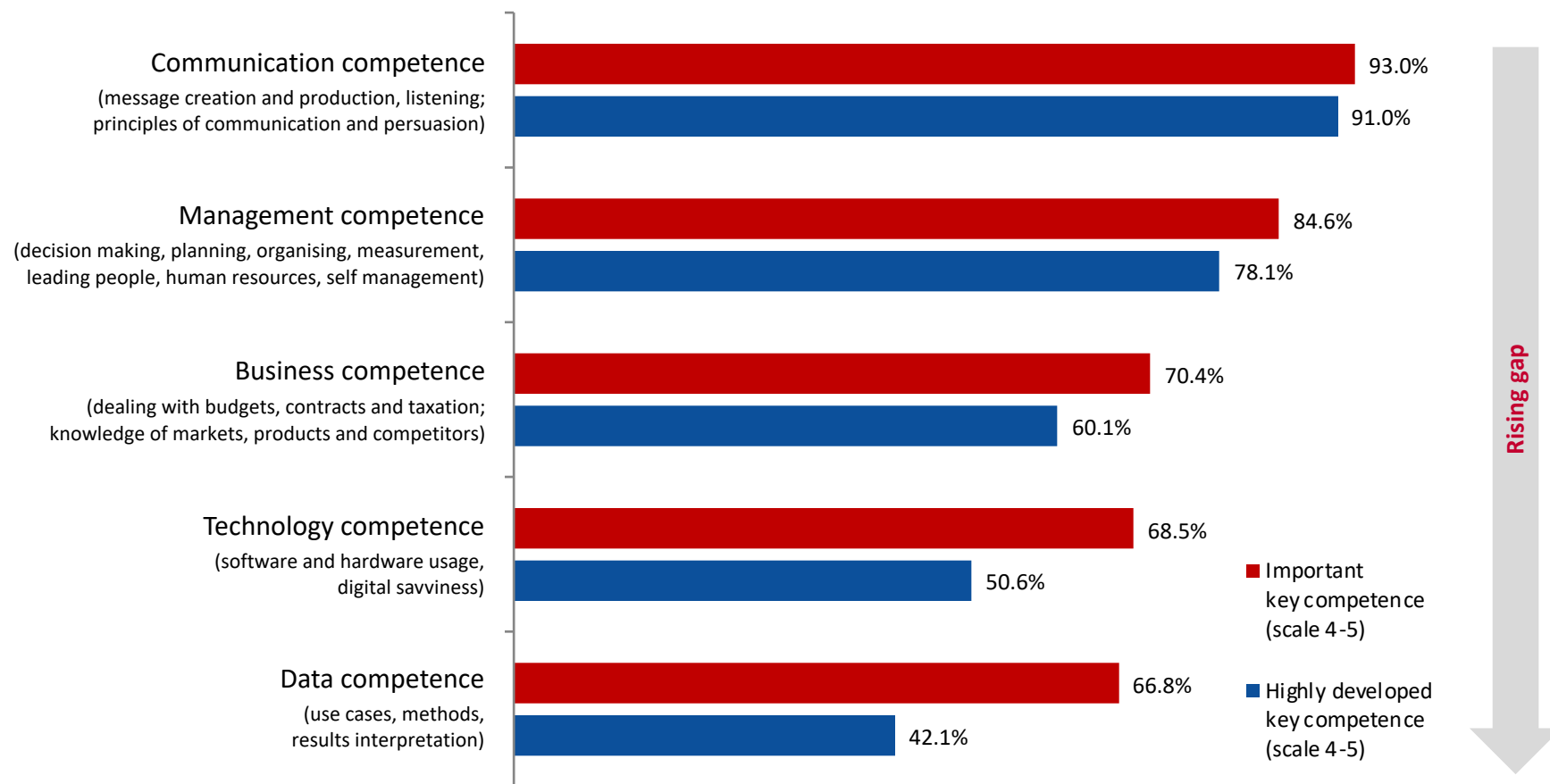
Development needs in communications are assessed as similar across all ranks – no significant differences between leaders and followers



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,172 communication professionals. Q 13: Practitioners working in strategic communication and public relations need a broad set of skills and knowledge to fulfill their tasks. How do you assess the current situation regarding competencies in communications? First scale 1 (Competencies are not at all discussed in the communication profession in my country) – 5 (Competencies are heavily discussed in the communication profession in my country); second scale 1 (There is no need at all for communication practitioners to develop their competencies) – 5 (There is a great need for communication practitioners to develop their competencies).

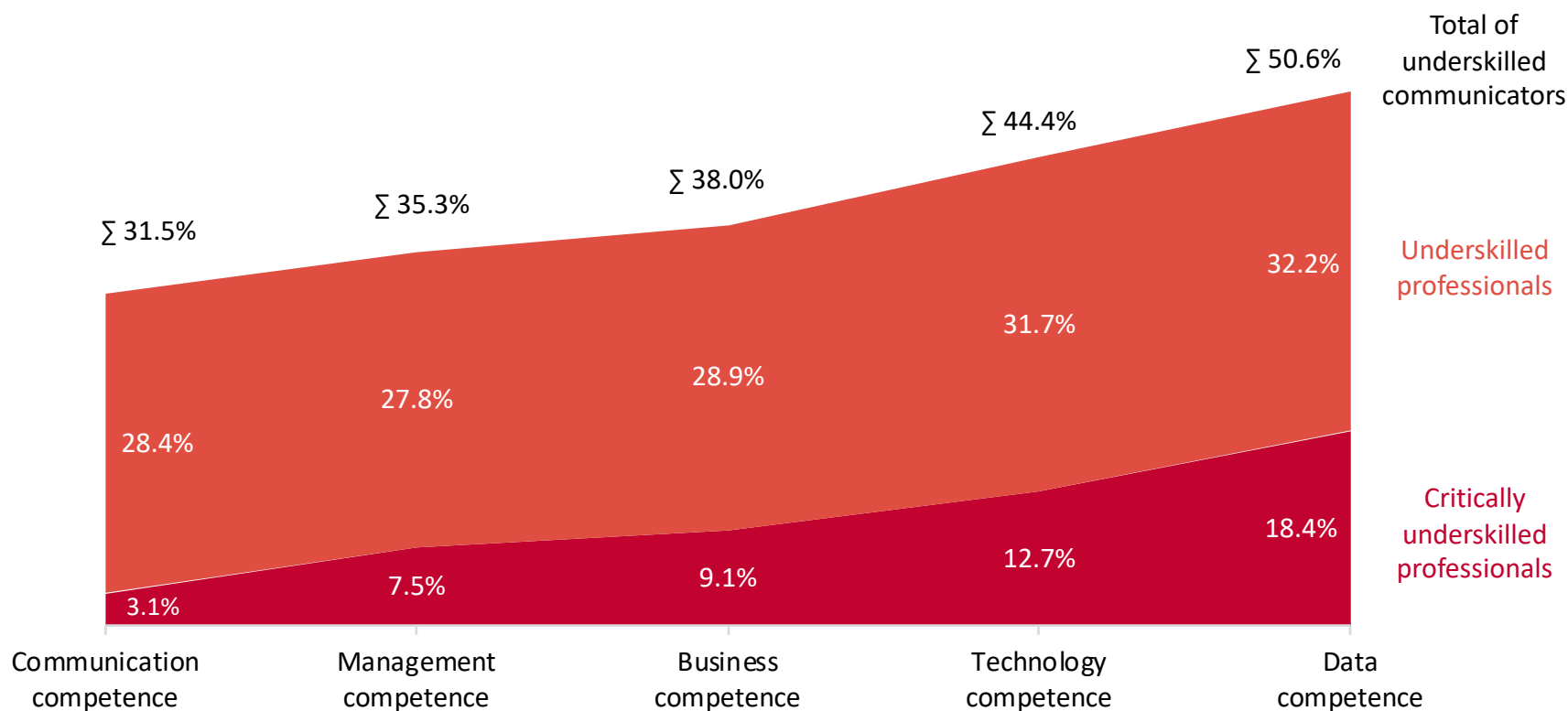
Key competencies of communication professionals in Europe: Large gaps between perceived importance and personal qualification level

Importance of competencies vs. personal assessment of competencies by practitioners



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,306 communication professionals. Q 14: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Frequency based on scale points 4-5.

Lack of competencies among communication professionals: Every second lacks data competencies and every third management skills



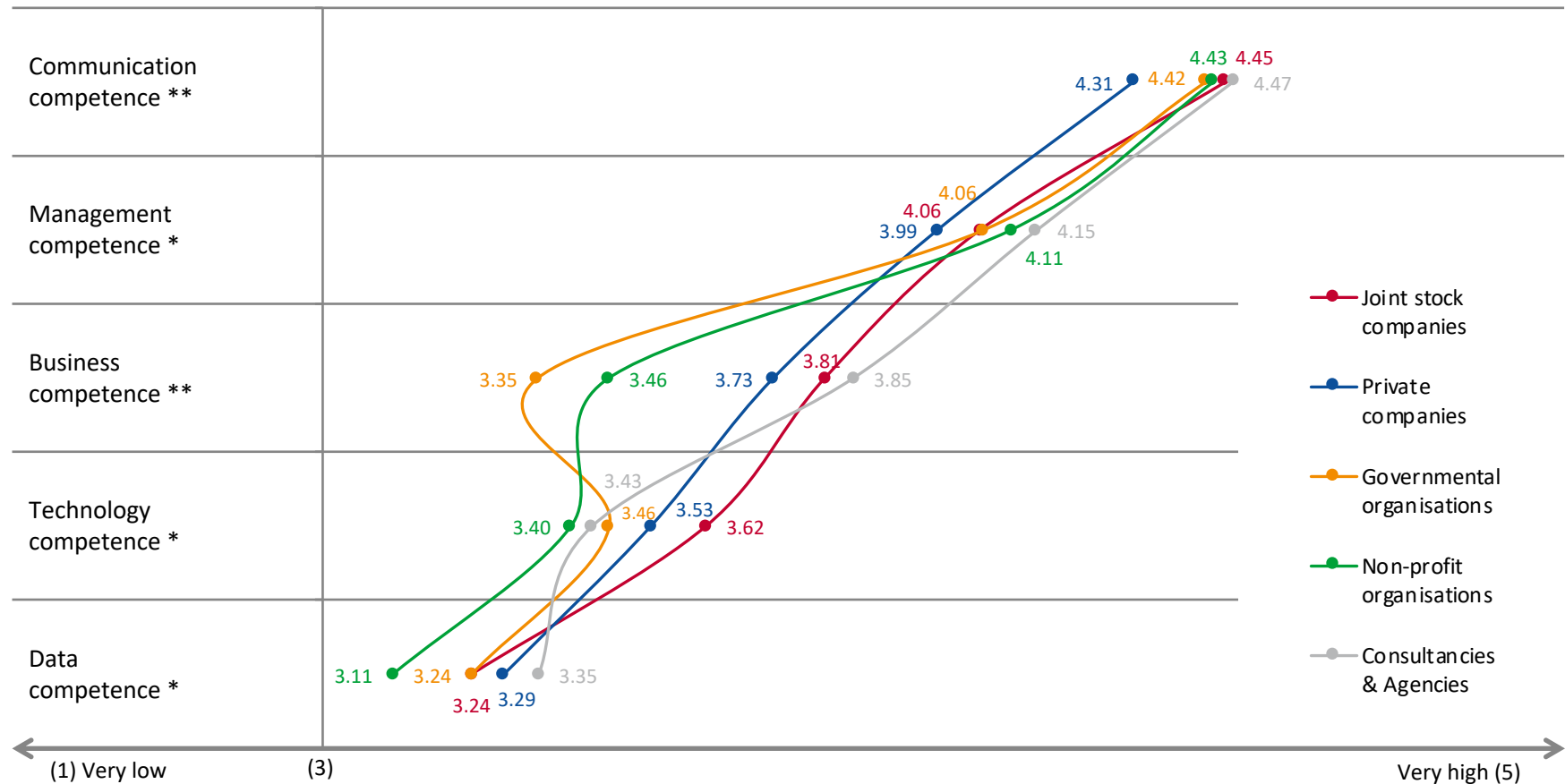
How the amount of underskilled professionals has been calculated

Underskilled professionals = those who perceive the importance of a competence 1 scale point higher than their personal level (e. g. importance = 5 “very high”, but personal level = 4 “above average”). Critically underskilled professionals = those who perceive the importance of a competence 2 or more scale points higher than their personal level (e. g. importance = 4 „above average”, but personal level = 2 “below average”).

www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,306 communication professionals. Q 14: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Mean values.

Practitioners working in governmental organisations and non-profits rate their business and data competencies significantly lower

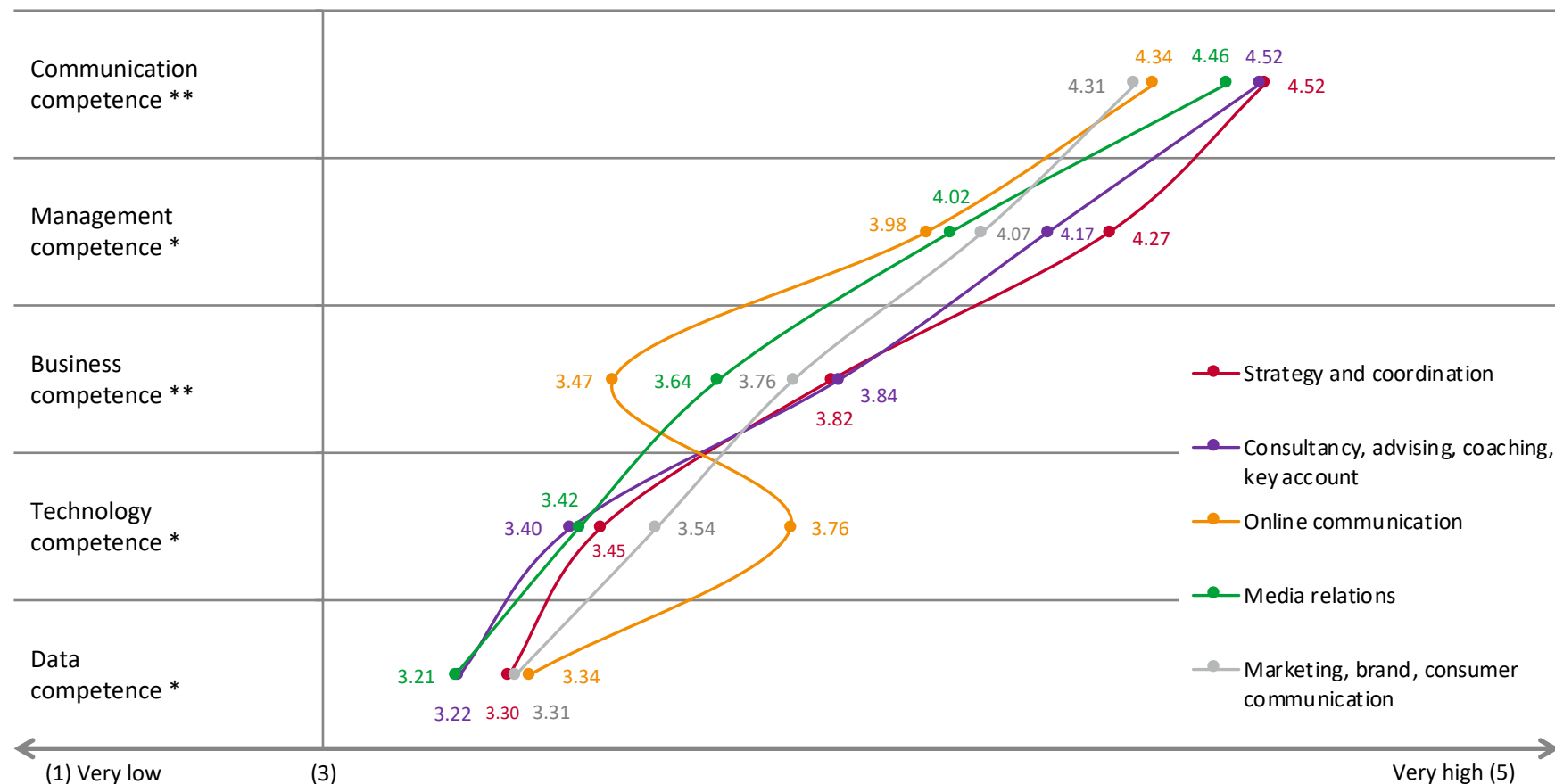
Personal assessment of competency levels by communication professionals



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,306 communication professionals. Q 14: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Mean values. ** Highly significant differences (ANOVA, $p \leq 0.01$). * Significant differences (ANOVA, $p \leq 0.05$).

Online communicators stand out with their technology and data competencies, but have a clear need to catch up on business skills

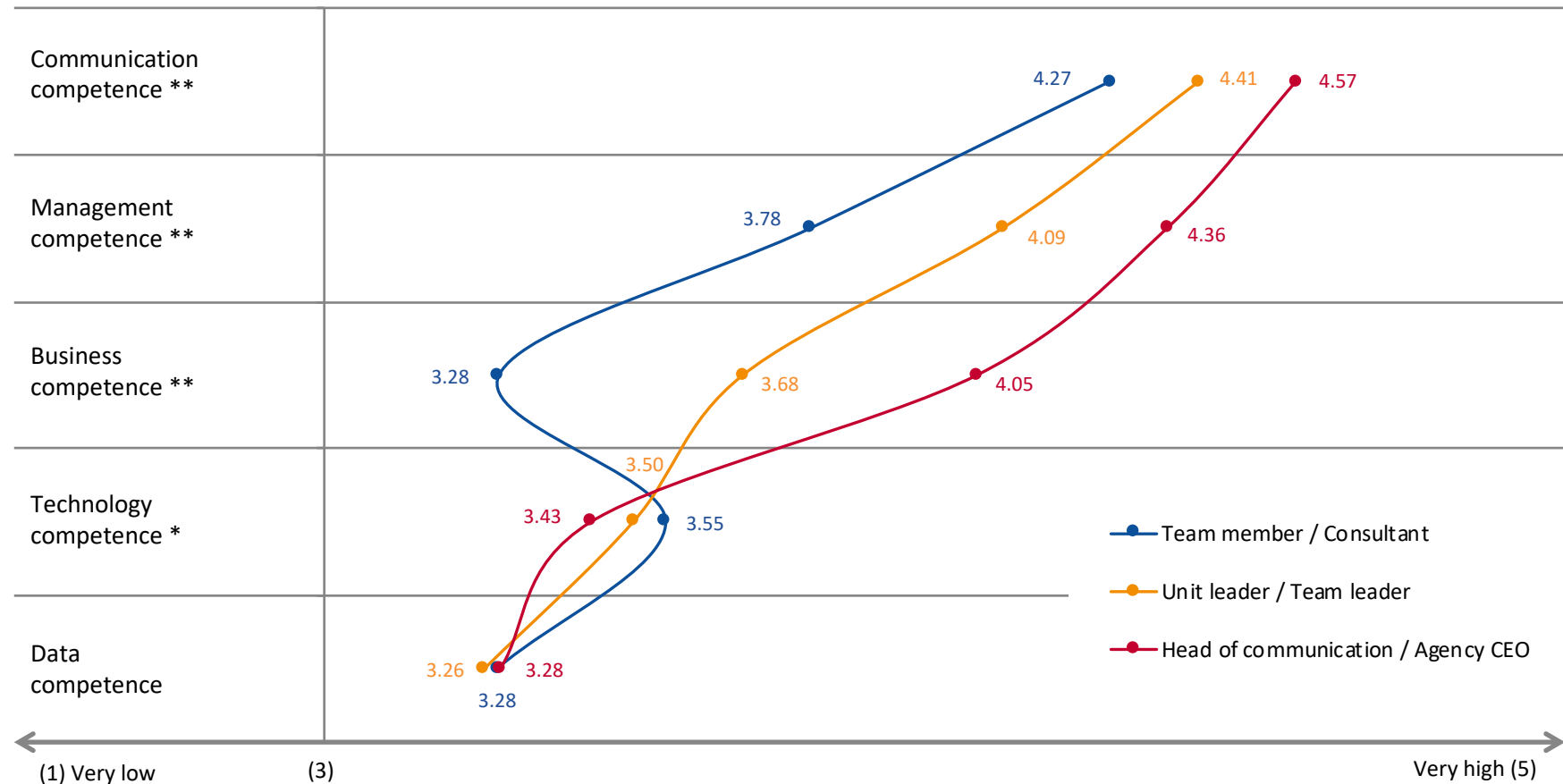
Personal assessment of competency levels by communication professionals



www.communicationmonitor.eu / Zerfass et al. 2020 / $n \geq 547$ communication professionals. Q14: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Mean values. ** Highly significant differences (ANOVA, $p \leq 0.01$). * Significant differences (ANOVA, $p \leq 0.05$).

Leaders are confident about their business, management and communication skills – but do not view themselves as better than subordinates in handling data

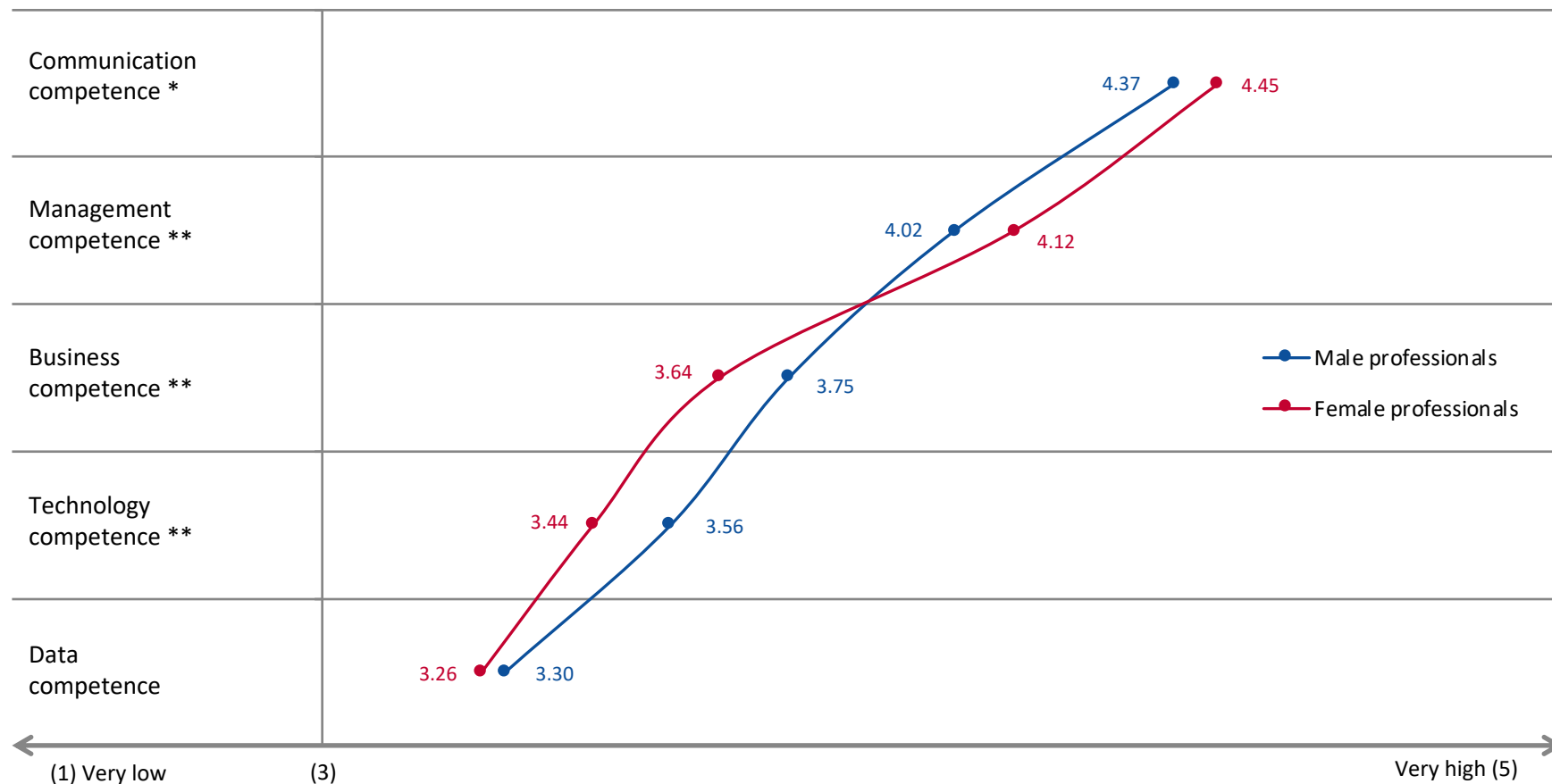
Personal assessment of competency levels by communication professionals



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,158 communication professionals. Q 14: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Mean values. ** Highly significant differences (ANOVA, $p \leq 0.01$). * Significant differences (ANOVA, $p \leq 0.05$).

Female practitioners believe in their communication and management skills, while men rate their business and technology competencies significantly higher

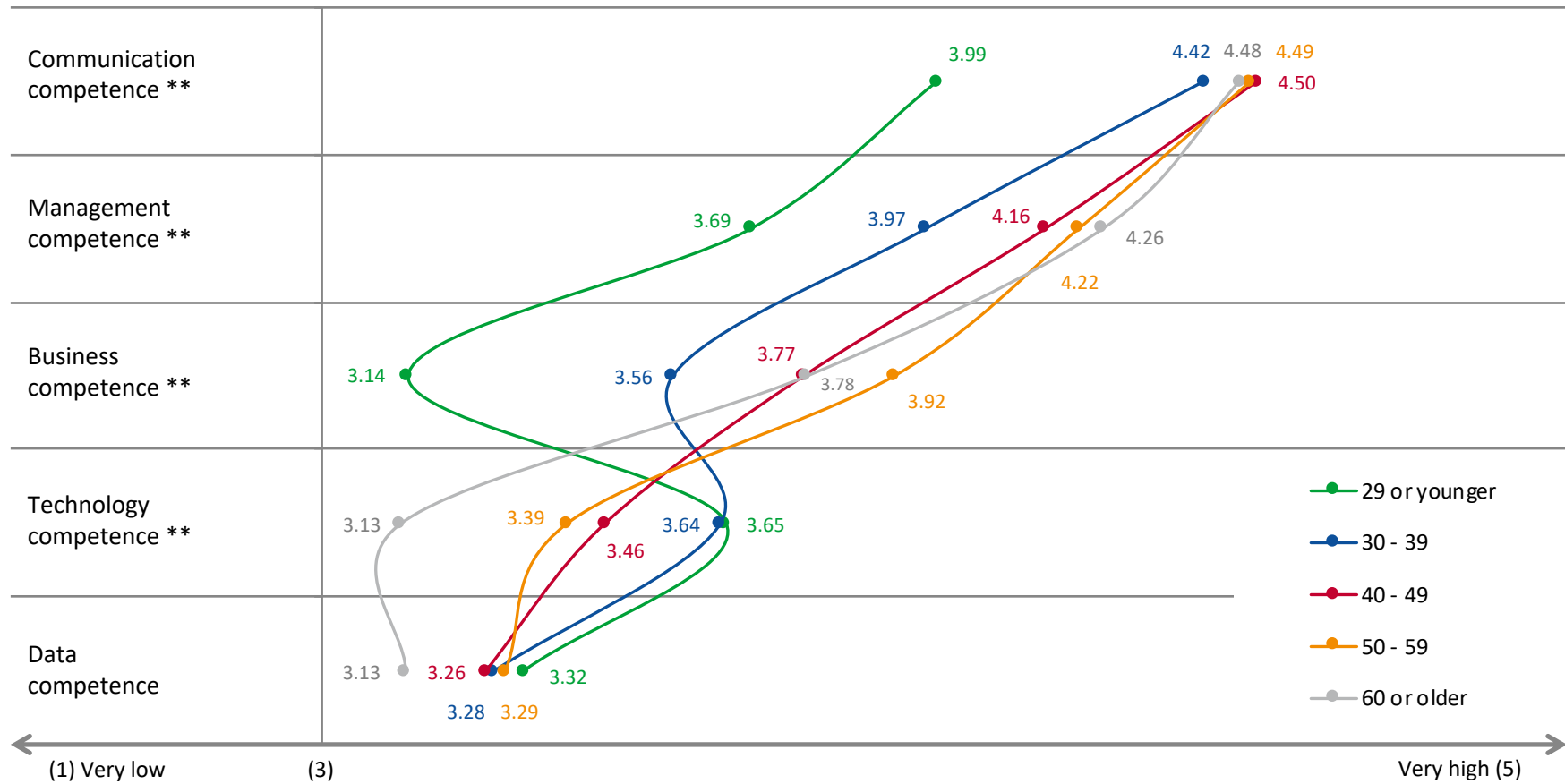
Personal assessment of competency levels by communication professionals



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,302 communication professionals. Q 14: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Mean values. ** Highly significant differences (ANOVA, $p \leq 0.01$). * Significant differences (ANOVA, $p \leq 0.05$).

Younger professionals are capable in handling technology and data, but are clearly lagging behind in terms of communication, management, and business skills

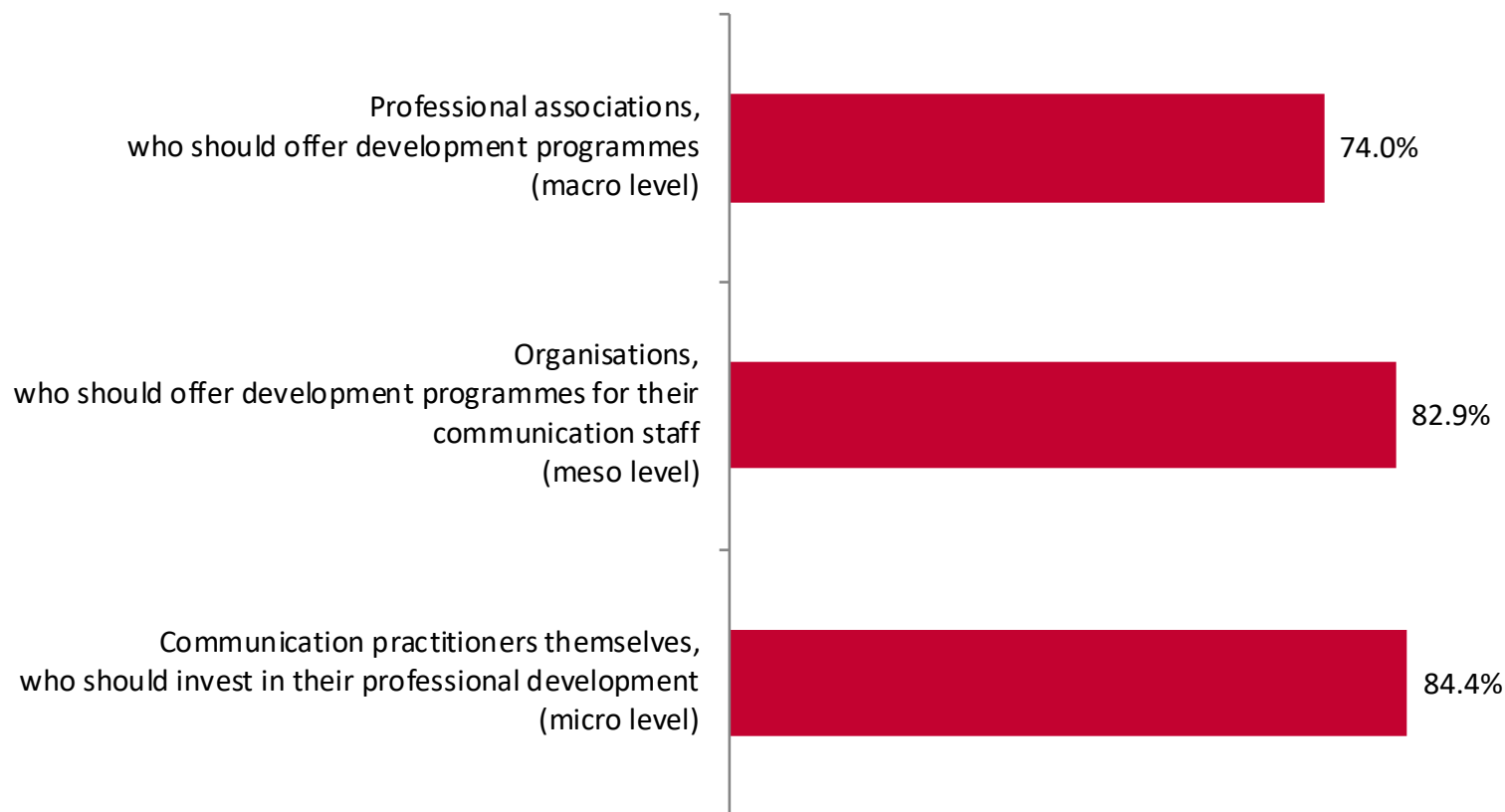
Personal assessment of competency levels by communication professionals



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,306 communication professionals. Q 14: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Mean values. ** Highly significant differences (Pearson correlation, $p \leq 0.01$).

Competency development in communications: Most practitioners believe it is their own responsibility and that of their organisations

Responsibility for the further development of competencies in the communications profession



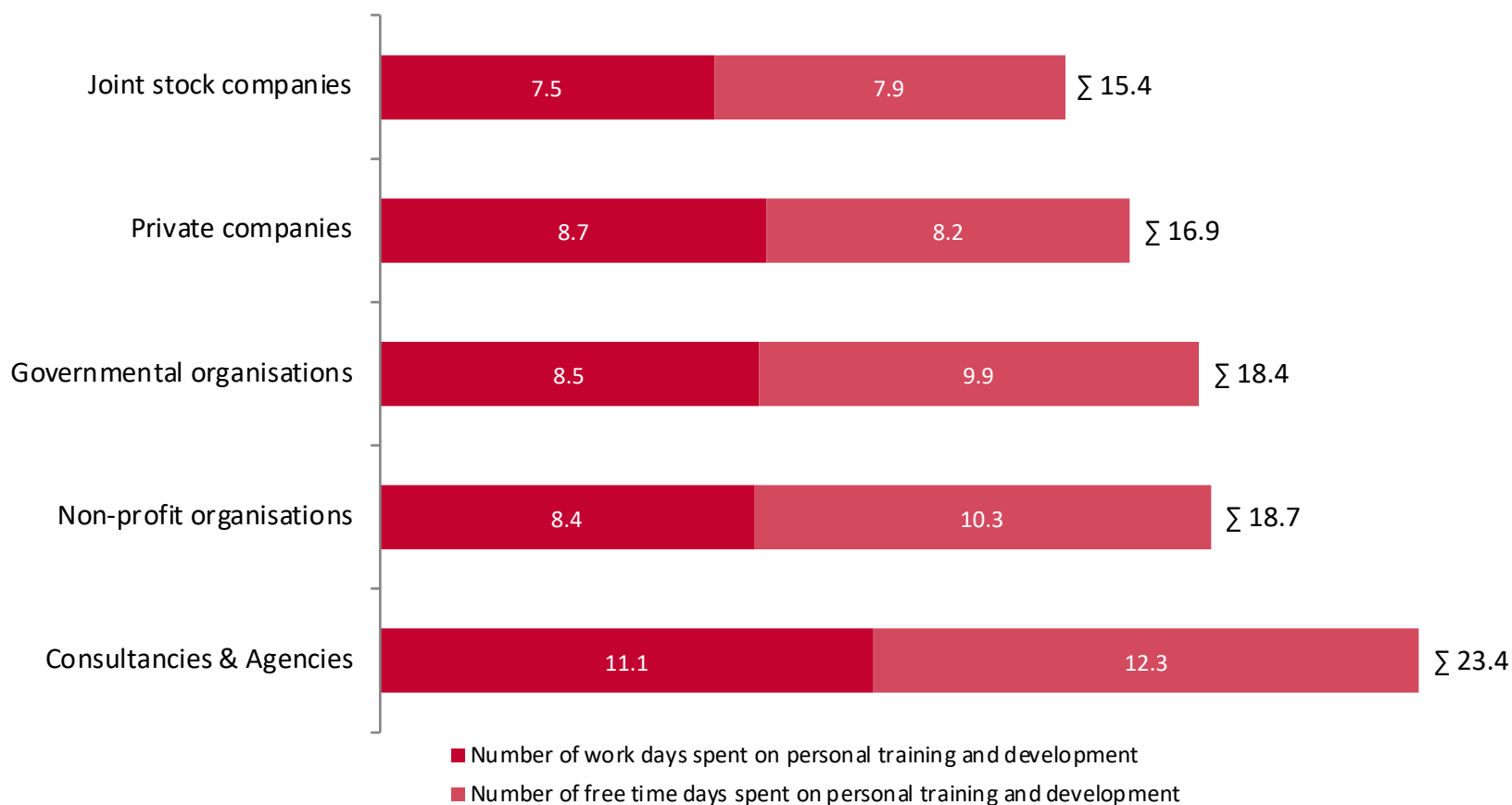
Practice of competency development in Europe: Communication professionals have completed an average of 19 training days per year

Full days spent on personal training and development in 2019



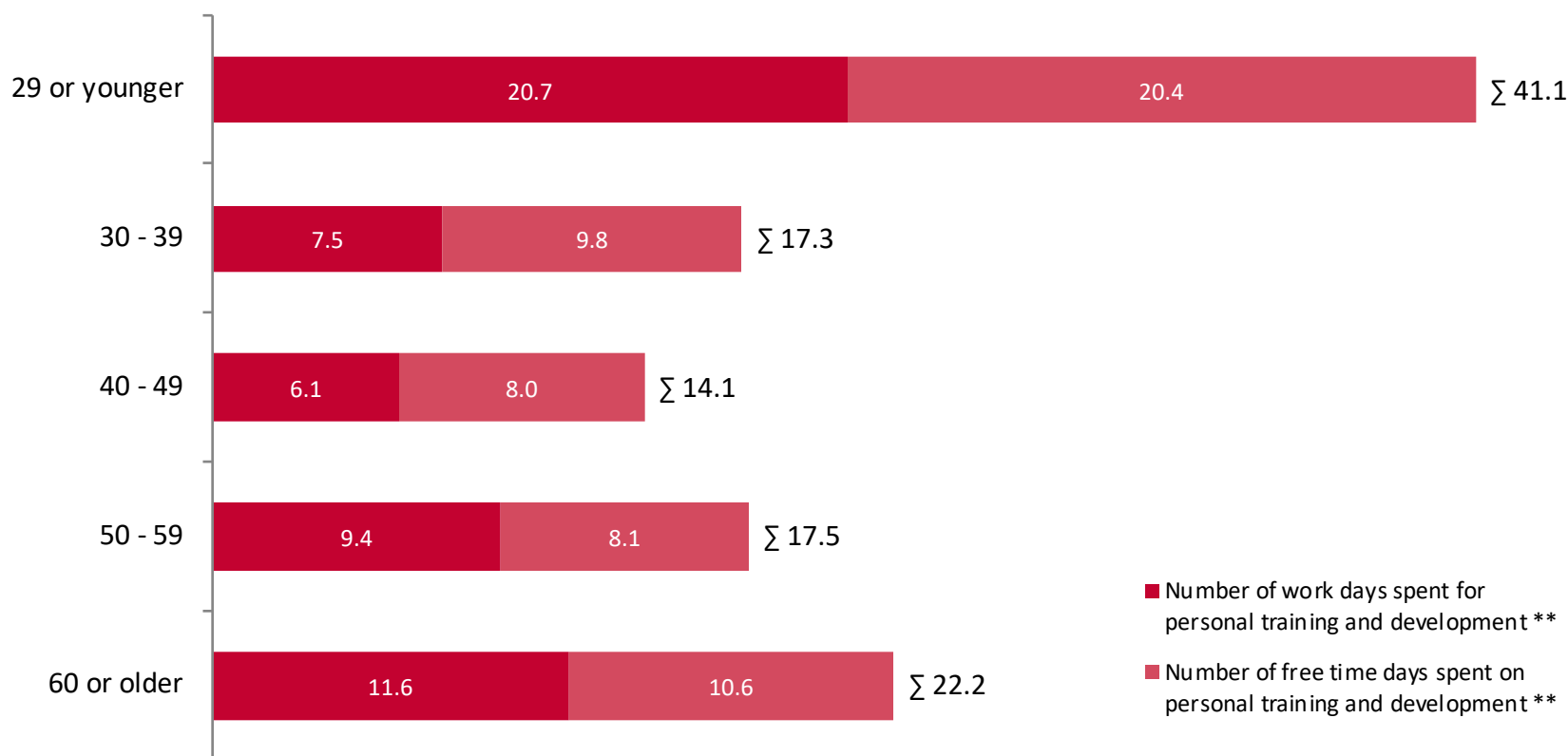
Communication professionals in consultancies and agencies spend more time on personal development than their colleagues in other types of organisations

Average number of full days spent by communication practitioners for personal training and development

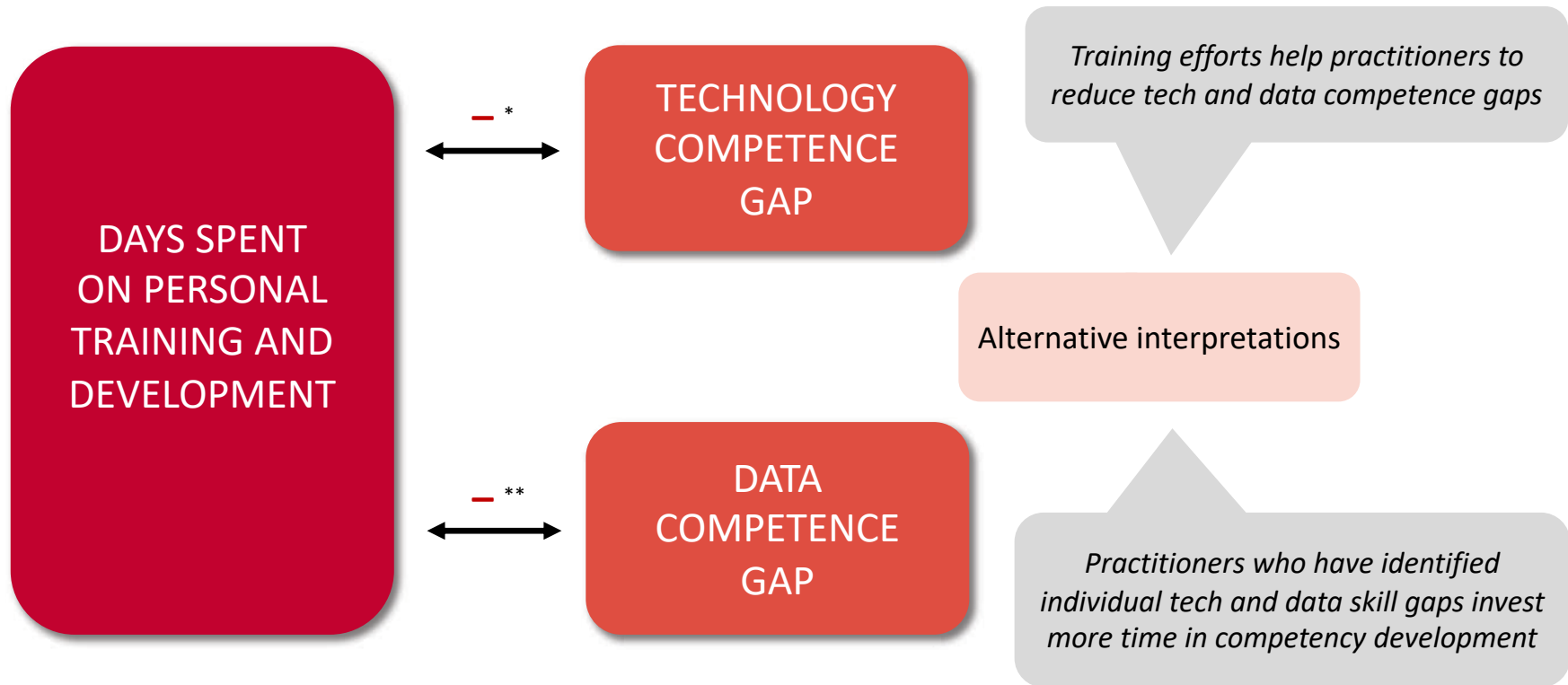


Younger professionals invest eight weeks of work and leisure time in further education per year – many of them will probably study part-time to advance skills

Average number of full days spent by communication practitioners for personal training and development

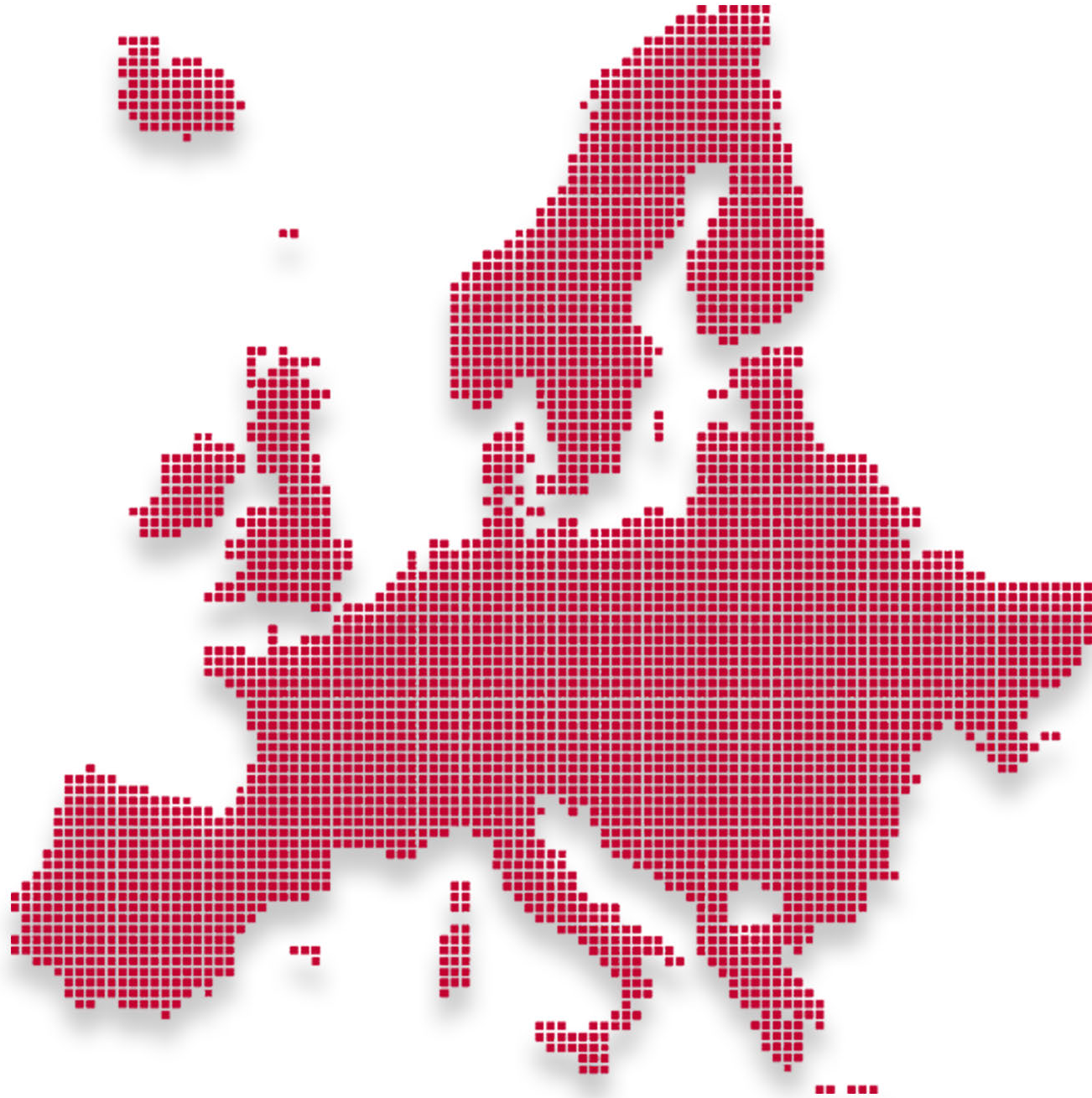


Educational efforts of communication practitioners correlate with the closing of competence gaps in handling data and technology



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 1,875 communication professionals. Q 14: (...) How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Competence gap: Difference between perceived importance and personal assessment of technology / data competence, values ranging from - 4 to + 4. Q 28: In 2019, how many days have you spent on personal training and development in any fields (including further education / studying while working; add part-time to full days). ** Highly significant correlation (Pearson correlation, $p \leq 0.01$). * Significant correlation (Pearson correlation, $p \leq 0.05$).

Salaries



Salaries

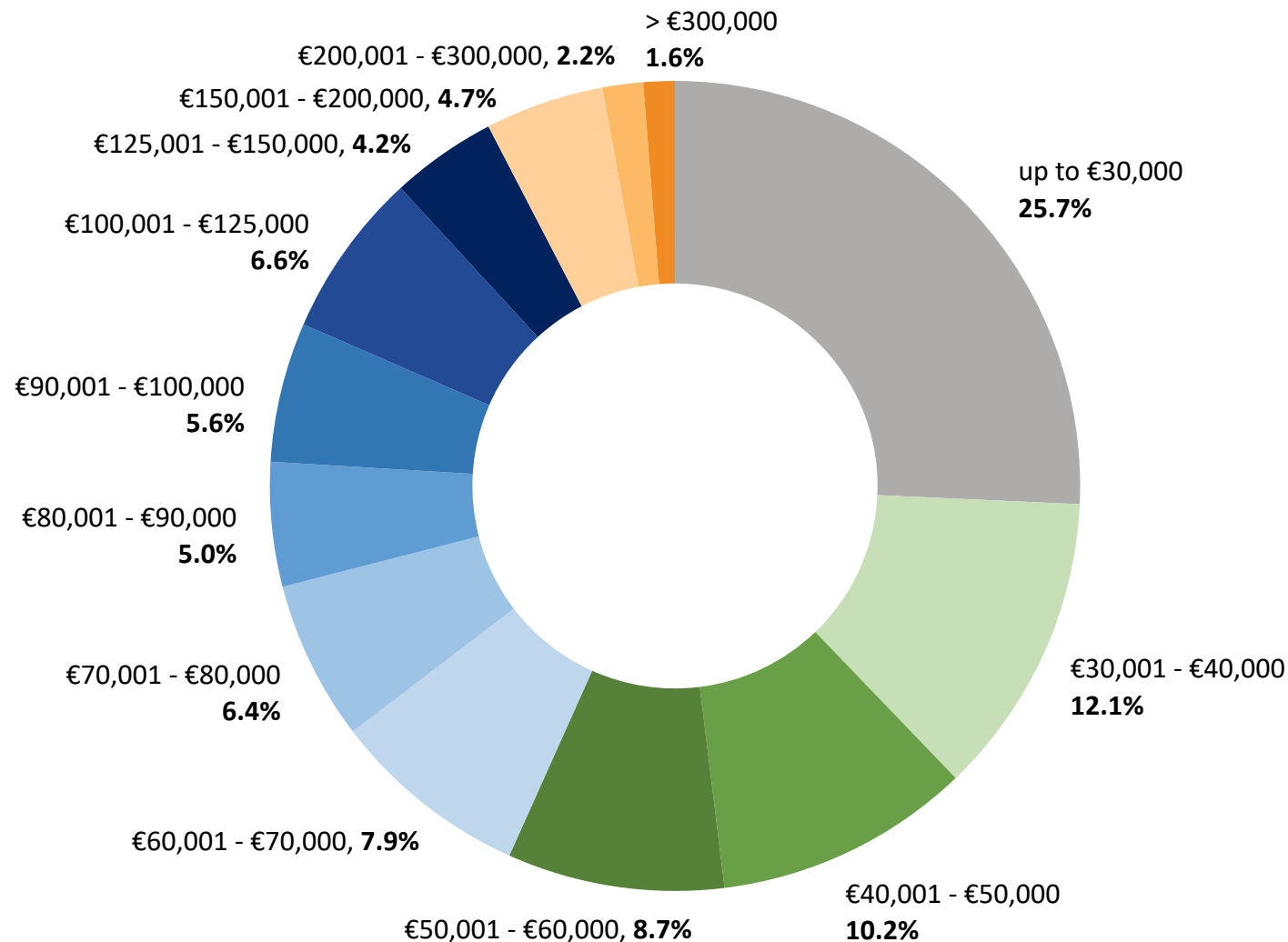
Data on salaries for communication professionals have been collected by the European Communication Monitor since 2009. Over that time, salaries have remained stable, especially for the top earners, with variations reflecting differences in economic status within and between countries, and changes in the composition of respondents in the annual sample. Many countries in Europe now require large employers to publish their gender pay gaps (what they pay male and female employees for the same job or role). Each year we report these findings we discuss familiar pay differences that are reflected in other sectors of society. This is despite communications being a female dominated industry which has generated gender discussions and debate in the literature (Place & Vardeman-Winter, 2018; Tench et al., 2017a; Toth & Aldoory, 2017) as well as in national professional associations across Europe.

In the 2020 ECM, almost one in five (19.3 per cent) respondents earn between €100,001 and €300,000. Whilst 1.6 per cent earn over €300,000 per year, a difference of only 0.8 per cent since 2009 (Zerfass et al., 2009). Conversely, every third respondent (31 per cent) is earning between €30,001 and €60,000 per year, whilst over a quarter (25.7 per cent) earns up to €30,000, which is almost the same portion like in 2019 (Zerfass et al., 2019). Remuneration differs somewhat between ranks. Over a third (35.3 per cent) of top-level communicators earn over €100,000, whilst just nine per cent of communicators on other hierarchical levels are in this bracket. Most team leaders and members (36.2 per cent) earn between €30,001 and €60,000 per year, with only 3.1 per cent earning over €150,000, compared to 15.7 per cent of top-level communicators' salaries exceeding this amount. Longitudinal tracking of communicators' salaries reveals that the proportion of top-level earners has not changed much over time.

Remuneration between organisation type has remained relatively stable. Consultancies and agencies offered top salaries in the 2012 ECM but were also the largest provider of the lowest salaries (under €30,000 per year) (Zerfass et al., 2012). A similar pattern was evident this year. Agencies offer the highest number of salaries over €300,000 per year but also the greatest proportion of salaries under €30,000. The data reveals a clear gender divide. Salaries reported by female practitioners are lower compared to male communicators, both for top positions and other hierarchical levels. There are 20.5 per cent male communication heads and agency CEOs who make more than €150,000, but only 10.7 per cent of female leaders in the same salary band. There are also 17.3 per cent women compared to 9.6 per cent men who earn up to €30,000.

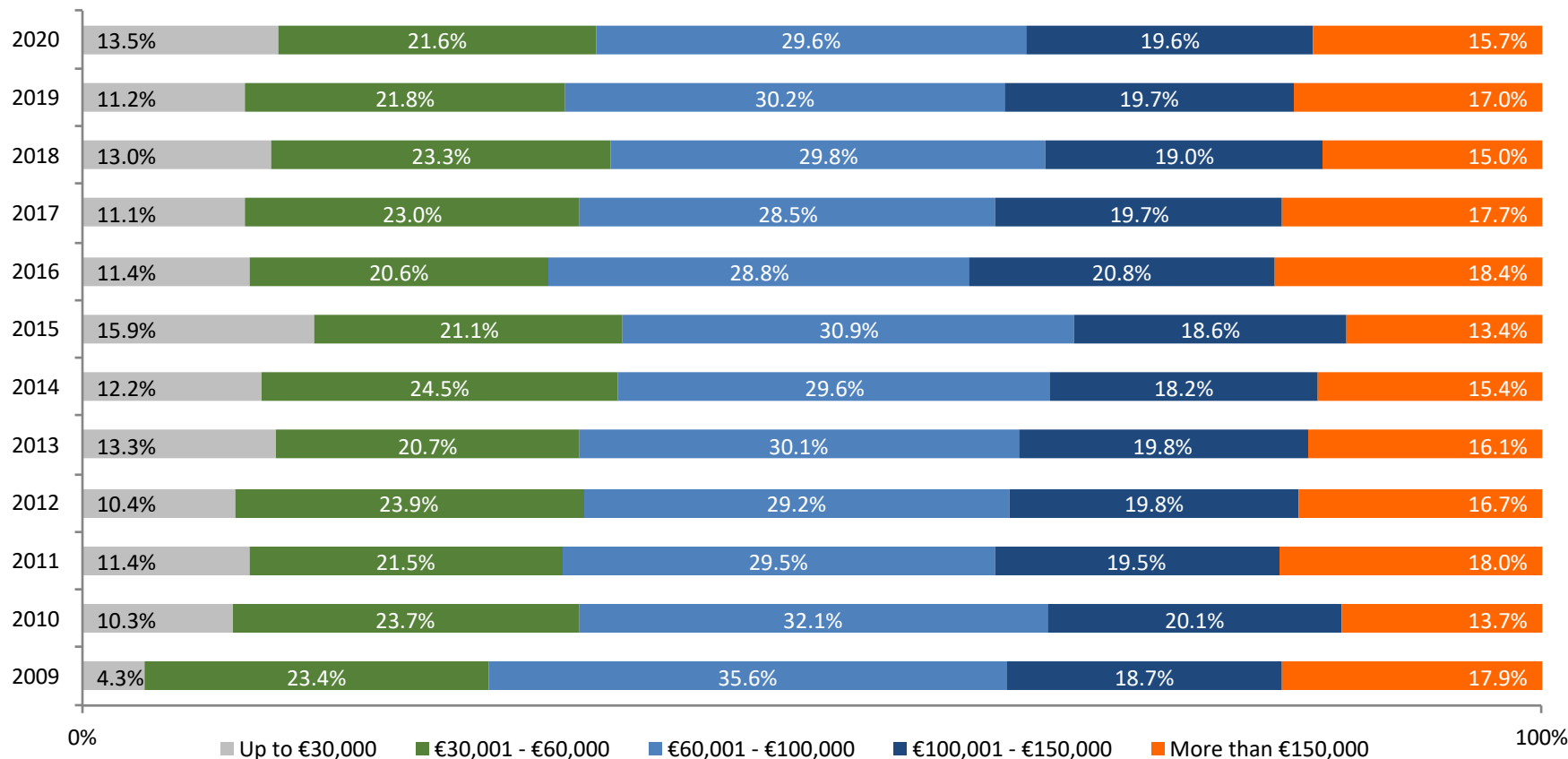
Reflecting the different levels of development across Europe, and the results of previous ECM annual reports, the highest paid practitioners work in North and Western Europe, whilst the lowest paid work in East and Southern Europe. Almost half (45.5 per cent) of communication professionals in Switzerland earn more than €150,000 per year, similar to what been reported last year (Zerfass et al., 2019). However, there are no responders in this salary group in Greece, Slovenia, Serbia or the Czech Republic. Conversely, over 73.8 per cent of practitioners in Croatia, and 70.3 per cent in Serbia earn up to €30,000 per year, compared to no responders in this group in Switzerland, the Netherlands or Norway. As always these figures have to be put in context. The average annual income in the 22 key countries analysed differs a great deal (EUROSTAT, 2020), as are the costs of living, further education etc.

Basic annual salary of communication practitioners in Europe 2020



Longitudinal tracking of top level communicators' salaries

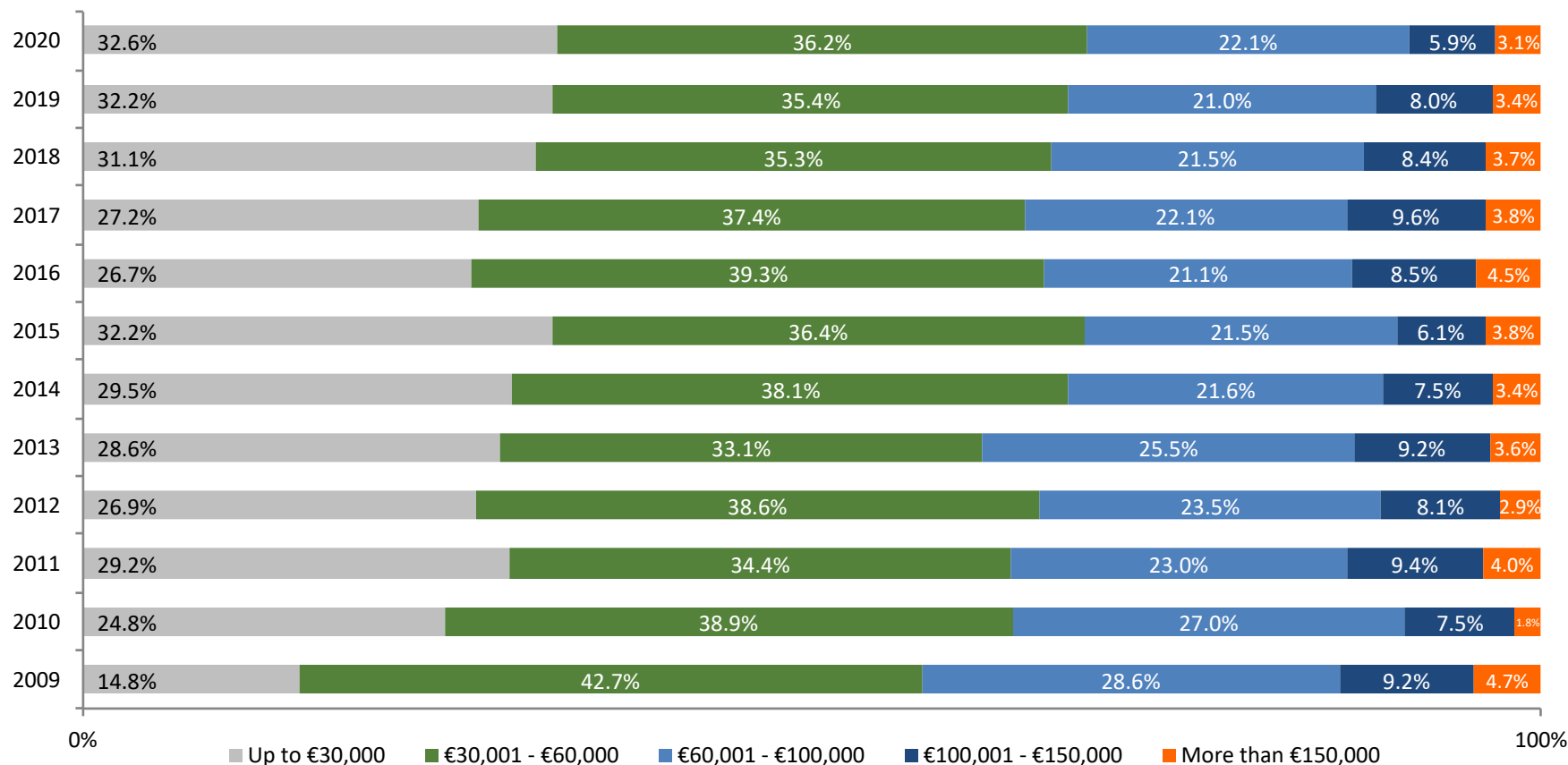
Basic annual salary (Heads of communication departments and agency CEOs)



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 689 heads of communication and agency CEOs (Q36); 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

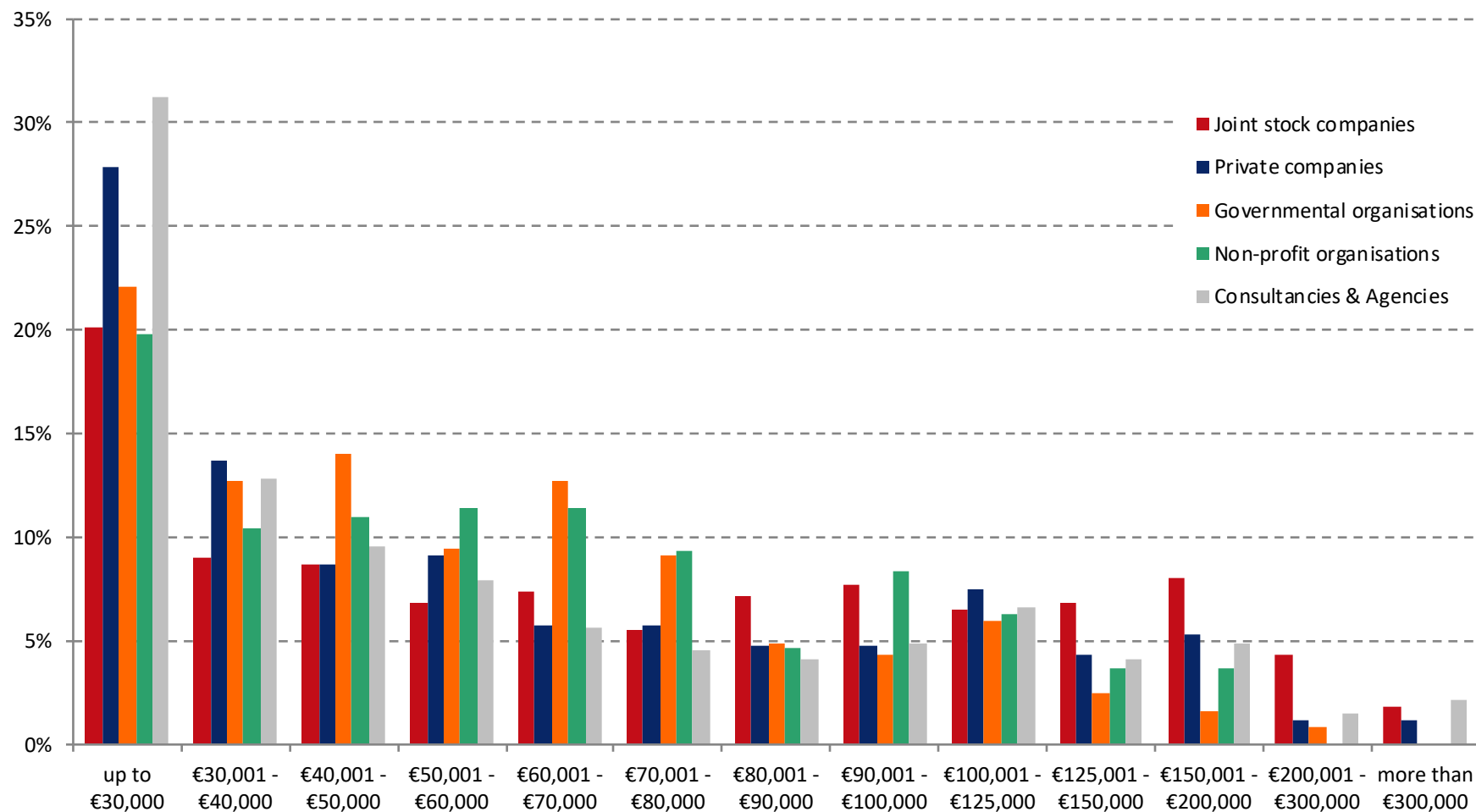
Basic annual salary (Unit leaders, team leaders, team members, consultants)



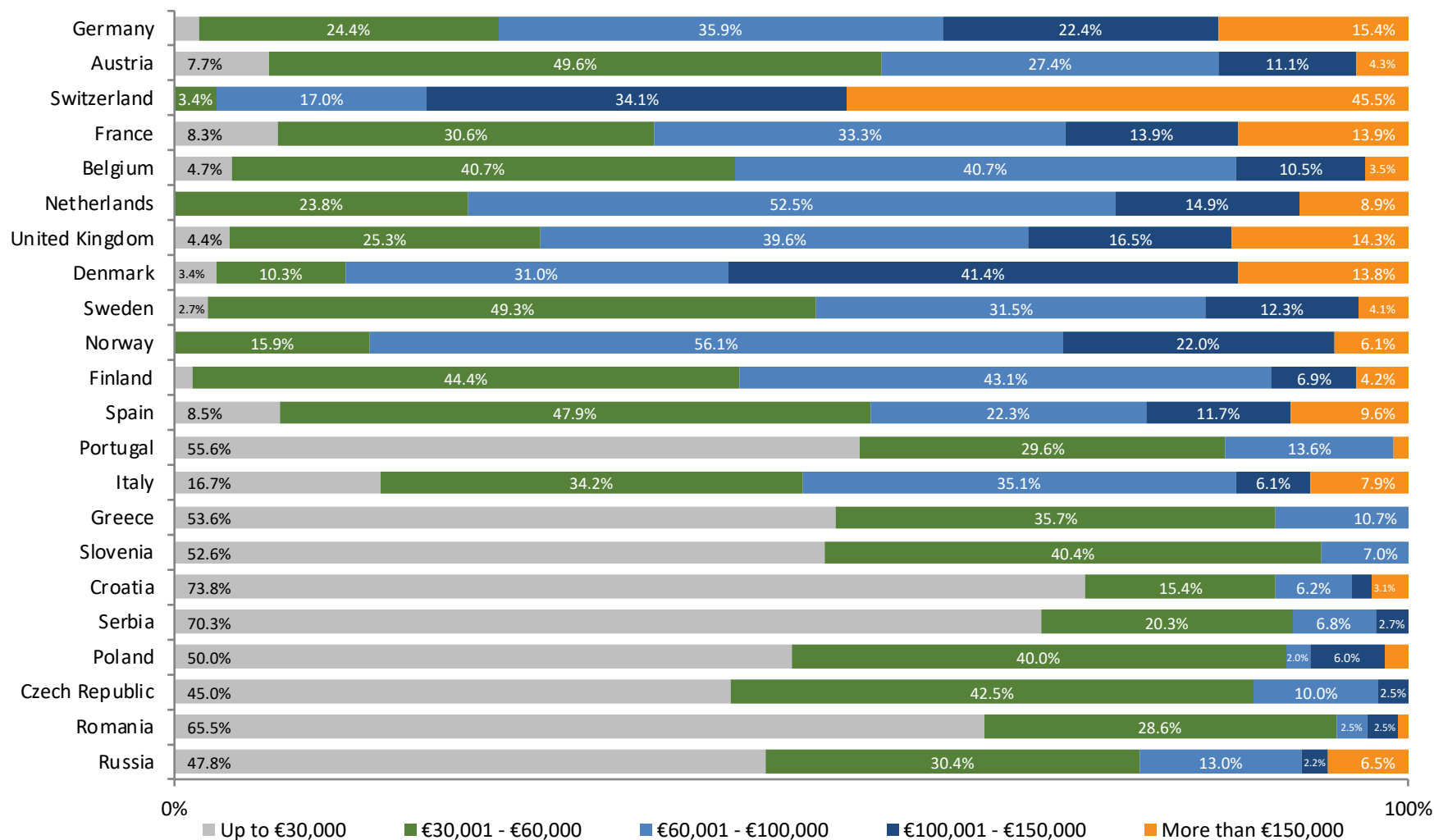
www.communicationmonitor.eu / Zerfass et al. 2020 / n = 1,228 communication professionals below the top level of the hierarchy (Q36); Zerfass et al. 2019 / n = 1,266 (Q 34); Zerfass et al. 2018 / n = 1,602 (Q 37); Zerfass et al. 2017 / n = 1,793 (Q 31); 2016 / n = 1,433 (Q 32); Zerfass et al. 2015 / n = 1,067 (Q 33); Zerfass et al. 2014 / n = 1,428 (Q 41); Zerfass et al. 2013 / n = 1,287 (Q 17); Zerfass et al. 2012 / n = 1,013 (Q 39); Zerfass et al. 2011 / n = 927 (Q 20); Zerfass et al. 2010 / n = 879 (Q 19); Zerfass et al. 2009 / n = 817 (Q 17). Q: In which of the following bands does your basic annual salary fall? Results might be influenced by varying numbers and regional/hierarchical background of respondents in annual surveys.

Annual salaries in different types of organisation

Basic annual salary (all communication practitioners)



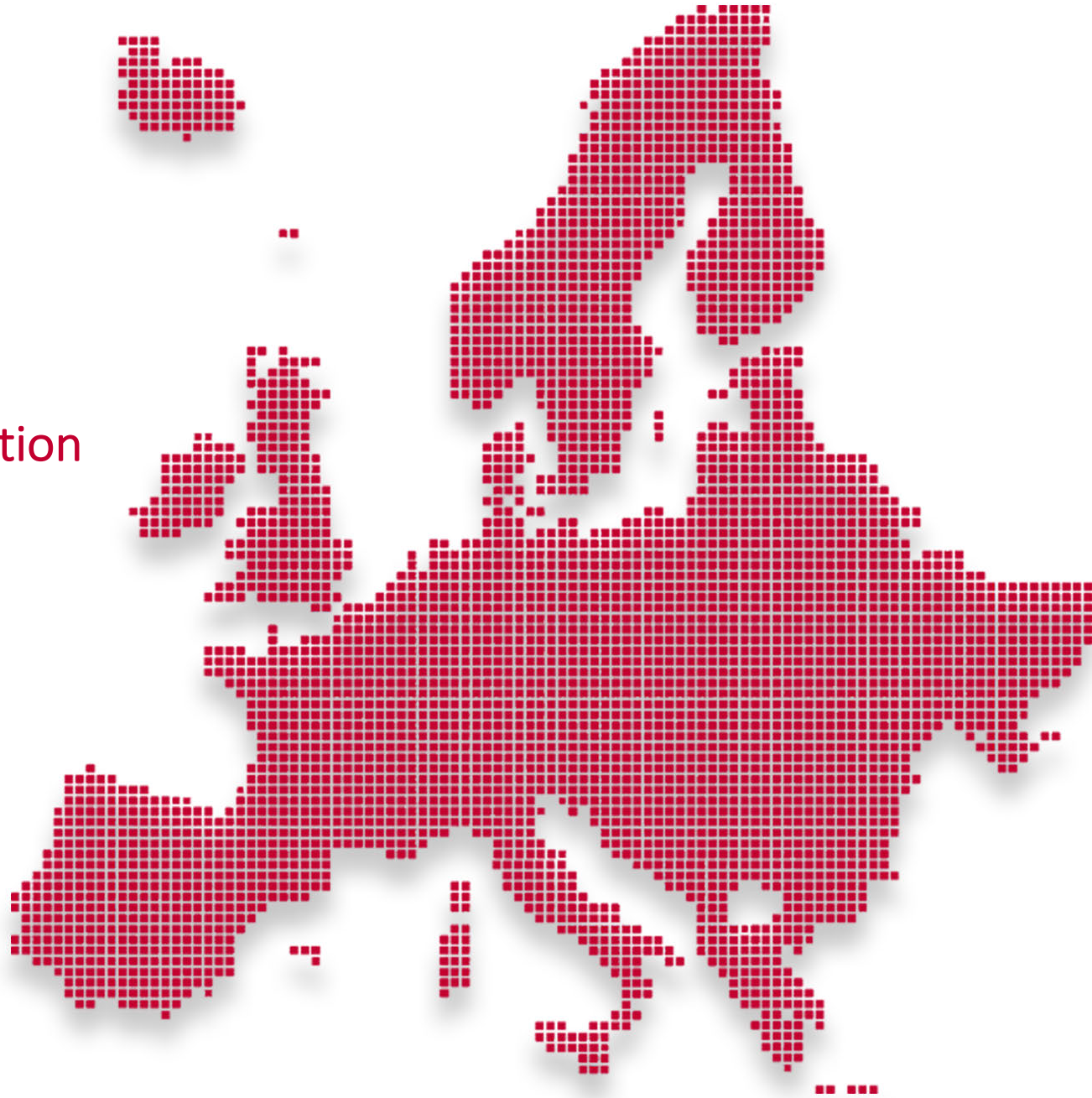
Spread of annual salaries for communicators across Europe



Annual salaries in different European countries

	Up to €30,000	€30,001 - €60,000	€60,001 - €100,000	€100,001 - €150,000	More than €150,000		Up to €30,000	€30,001 - €60,000	€60,001 - €100,000	€100,001 - €150,000	More than €150,000
Germany	1.9%	24.4%	35.9%	22.4%	15.4%	Spain	8.5%	47.9%	22.3%	11.7%	9.6%
Austria	7.7%	49.6%	27.4%	11.1%	4.3%	Portugal	55.6%	29.6%	13.6%	-	1.2%
Switzerland	-	3.4%	17.0%	34.1%	45.5%	Italy	16.7%	34.2%	35.1%	6.1%	7.9%
France	8.3%	30.6%	33.3%	13.9%	13.9%	Greece	53.6%	35.7%	10.7%	-	-
Belgium	4.7%	40.7%	40.7%	10.5%	3.5%	Slovenia	52.6%	40.4%	7.0%	-	-
Netherlands	-	23.8%	52.5%	14.9%	8.9%	Croatia	73.8%	15.4%	6.2%	1.5%	3.0%
United Kingdom	4.4%	25.3%	39.6%	16.5%	14.3%	Serbia	70.3%	20.3%	6.8%	2.7%	-
Denmark	3.4%	10.3%	31.0%	41.4%	13.8%	Poland	50.0%	40.0%	2.0%	6.0%	2.0%
Sweden	2.7%	49.3%	31.5%	12.3%	4.1%	Czech Republic	45.0%	42.5%	10.0%	2.5%	-
Norway	-	15.9%	56.1%	22.0%	6.1%	Romania	65.5%	28.6%	2.5%	2.5%	0.8%
Finland	1.4%	44.4%	43.1%	6.9%	4.2%	Russia	47.8%	30.4%	13.0%	2.2%	6.5%

Characteristics of excellent communication departments



Characteristics of excellent communication departments

Since 2014, the European Communication Monitor has strived to identify excellent communication departments and explore why such departments are outstanding. Comparisons are possible thanks to the Comparative Excellence Framework (CEF), which was developed by the authors of the monitor studies (Verčič & Zerfass, 2016; Tench et al., 2017b). The CEF is based on four key attributes: advisory influence, executive influence, success and competence. Using the framework, departments in the sample are divided into two tiers: outstanding communication units (labelled excellent) and others to identify the differences between both. Excellence is calculated as a common consequence of internal standing of the communication department within the organisation (i.e. influence) and external results of the communication department's activities and its basic qualifications (i.e. performance). Influence is composed of advisory influence (conceptualised as senior managers taking recommendations of the communication function seriously and very seriously) and executive influence (conceptualised as communication function being likely or very likely invited to senior-level meetings dealing with organisational strategic planning). Performance is composed of success (the communication of an organisation being more or much more successful compared to those of other organisations) and competence (conceptualised as the quality and ability of the communication function being better or much better compared to those of competing organisations).

One in five (21.2 per cent) communication departments in the ECM 2020 outperformed on all four dimensions of the CEF. Whilst this number is slightly lower compared to previous monitor studies, the proportion of excellent communication departments has remained relatively stable since 2014. Joint stock companies are most likely to have excellent communication departments (23.6 per cent), whilst government organisations are the least likely (16.8 per cent). The factors that make excellent communication departments different from others are numerous. Practitioners working in excellent communication departments utilise ethical guidelines by professional associations more often when dealing with moral hazards. Practitioners also report fewer problems with gender inequalities, a trend that has been apparent since the ECM 2014 when a higher level of gender equality in organisations with excellent communication departments was reported (Zerfass et al., 2014). Female professionals working in excellent communication departments also report being less affected (21.9 per cent) by a glass ceiling problem hindering their career plans, compared to those in other departments (39 per cent). Therefore excellent communication departments report less problems with gender inequalities at all levels (macro – profession, meso – department / agency and micro – individual level), which is in line with findings in the ECM 2014 report (Zerfass et al., 2014).

Excellent communication departments are more aware of cyber security issues and take care of them in their daily work. Their organisations are less often attacked by cyber criminals, with almost every second (46.4 per cent) never having experienced a cyber attack, compared to 38 per cent of the rest. Excellent communication departments are also contributing stronger to cyber security activities in their organisations, such as education of employees and managing crisis communication. Last but not least, excellent departments emphasise the need to build and maintain trust, explore new ways of content creation and distribution, and deal with the speed and volume of information flow to a higher extent when key issues for the field in the near future are discussed.

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

(Q20)

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

EXECUTIVE INFLUENCE

(Q21)

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

SUCCESS

(Q22)

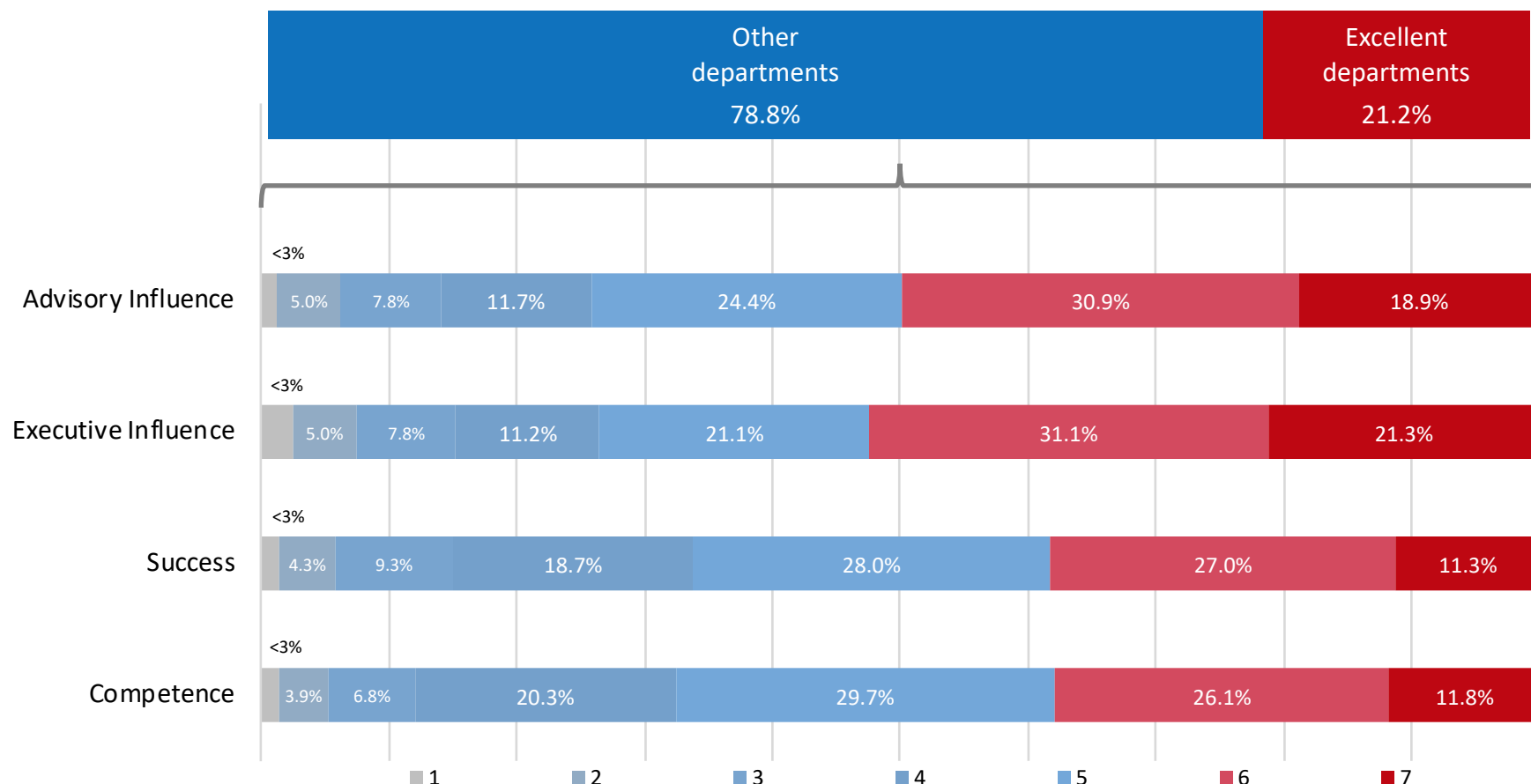
The communication of the organisation is (much) more successful compared to those of competing organisations

COMPETENCE

(Q23)

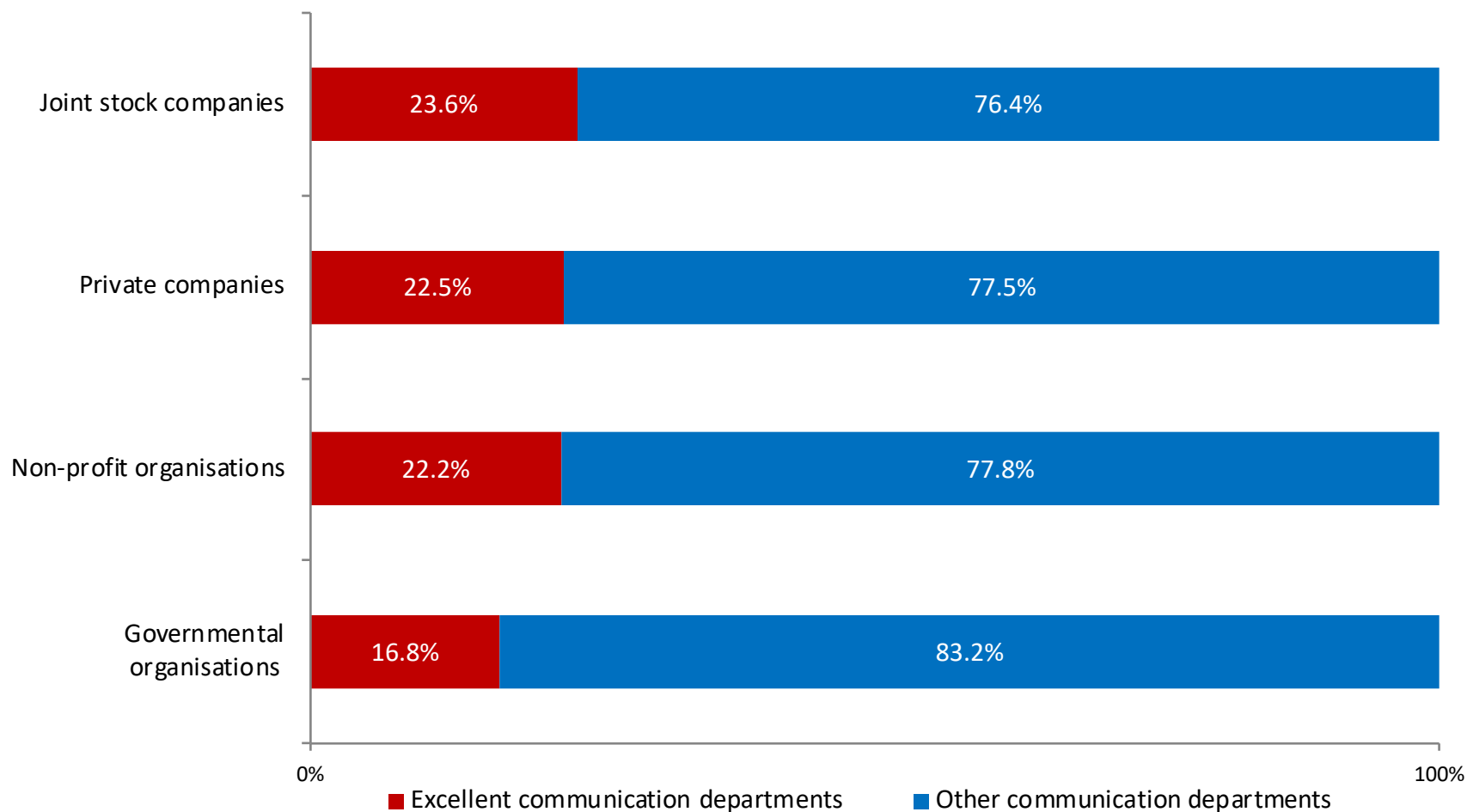
The quality and ability of the communication function is (much) better compared to those of competing organisations

Excellent communication departments in the sample



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 1,574 communications professionals in communication departments. Advisory influence, Q 20: 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 21: 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 22: 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 23: How would you estimate the quality and ability of the communication function in your organisation compared to those of competitors? Scale 1 (Much worse) – 7 (Much better). Percentages: Excellent communication departments based on scale points 6-7 for each item.

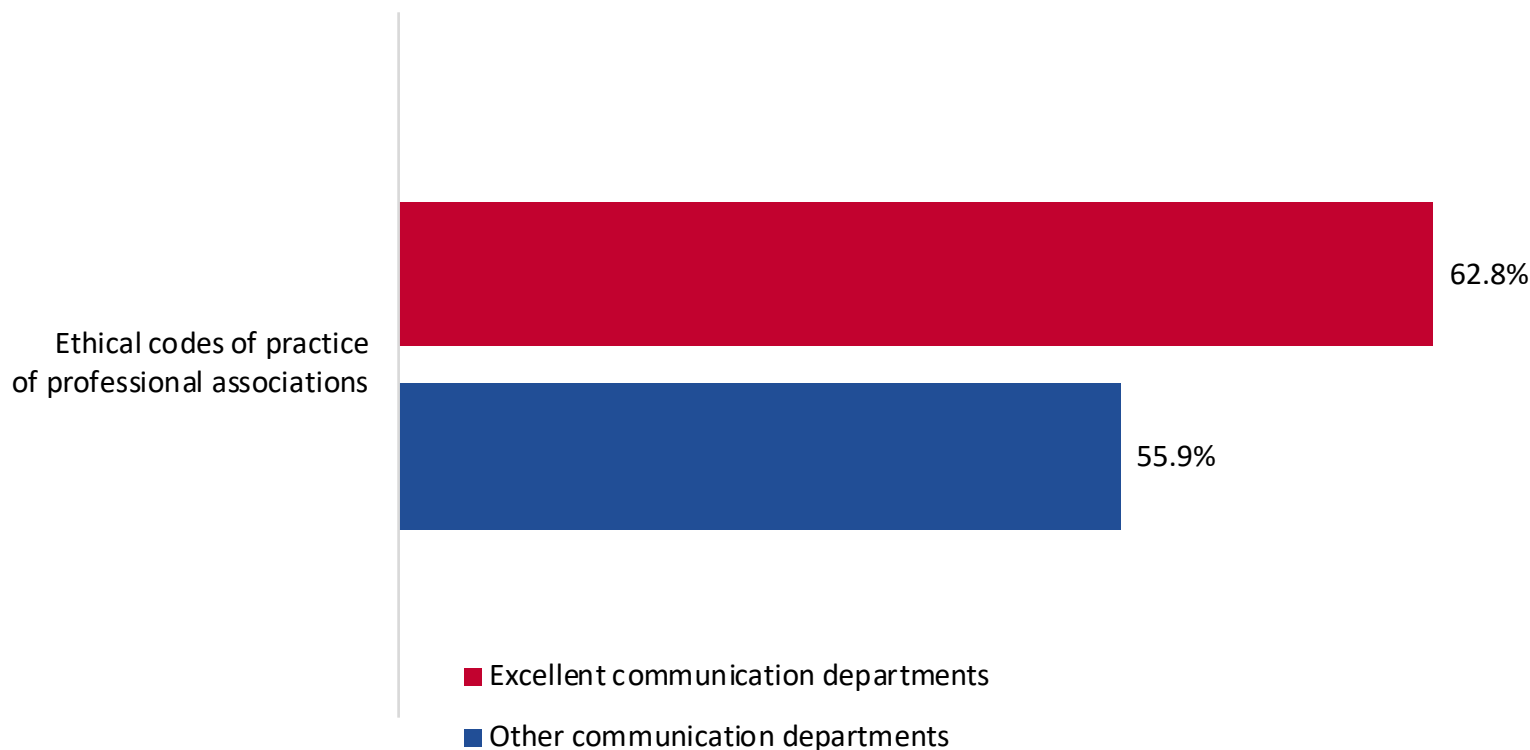
Excellence in different types of organisation



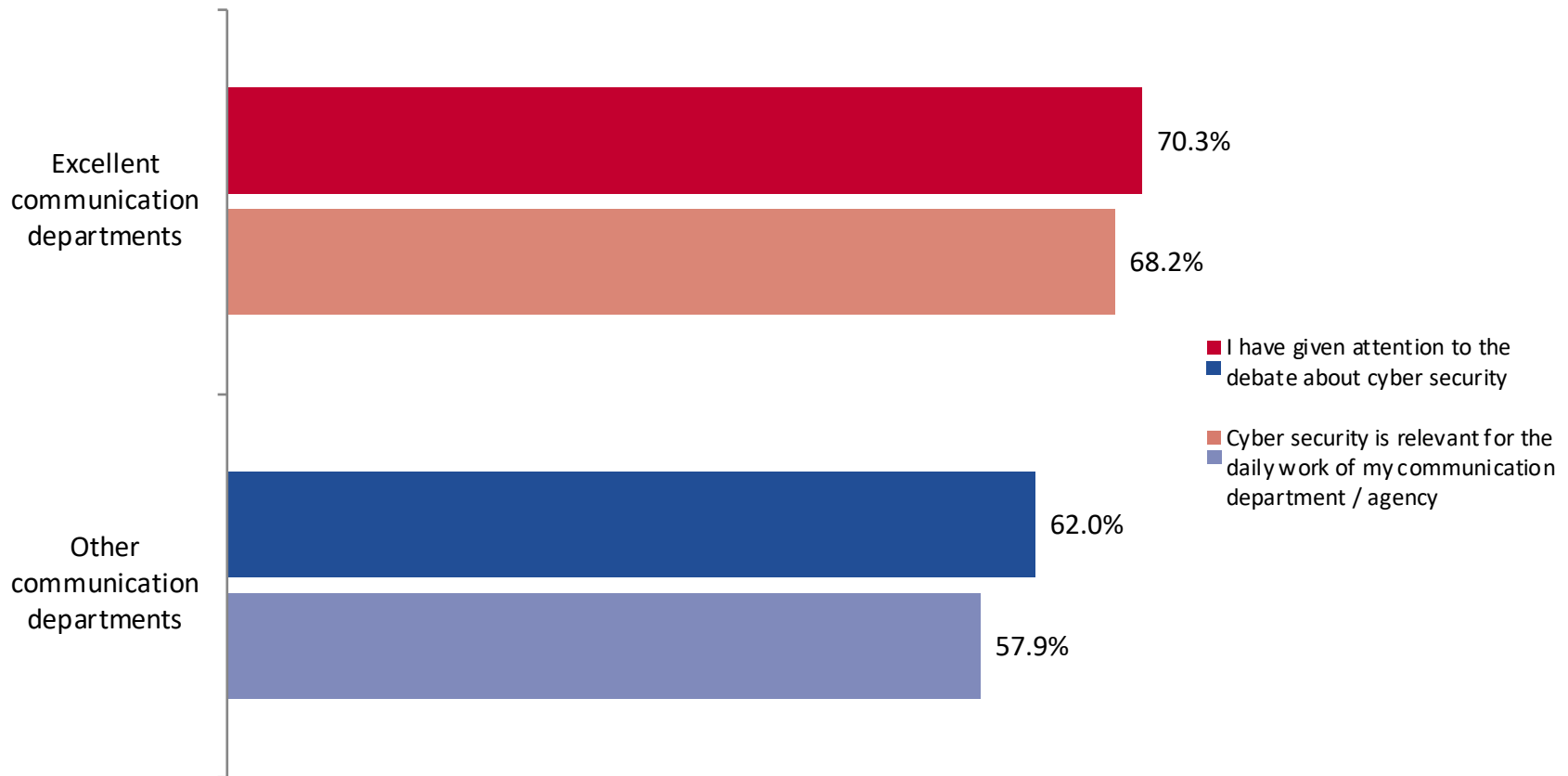
www.communicationmonitor.eu / Zerfass et al. 2020 / n = 1,574 communication professionals in communication departments. Advisory influence, Q 20: In your organisation, how seriously do senior managers take the recommendations of the communication function? Executive influence, Q 21: How likely is it, within our organisation, that communication would be invited to senior-level meetings dealing with organisational strategic planning? Q 22: In your opinion, how successful is the communication of your organisation compared to competitors? Q 23: How would you estimate the quality and ability of the communication function in your organisation compared to those of competitors? Scale 1 – 7. Percentages: Excellent communication departments based on scale points 6-7 for each question.

Communicators working in excellent departments utilise ethical guidelines by professional associations more often when dealing with moral dilemmas

Resources used for dealing with ethical challenges



Excellent communication departments are more aware of cyber security issues and take care of them in their daily work

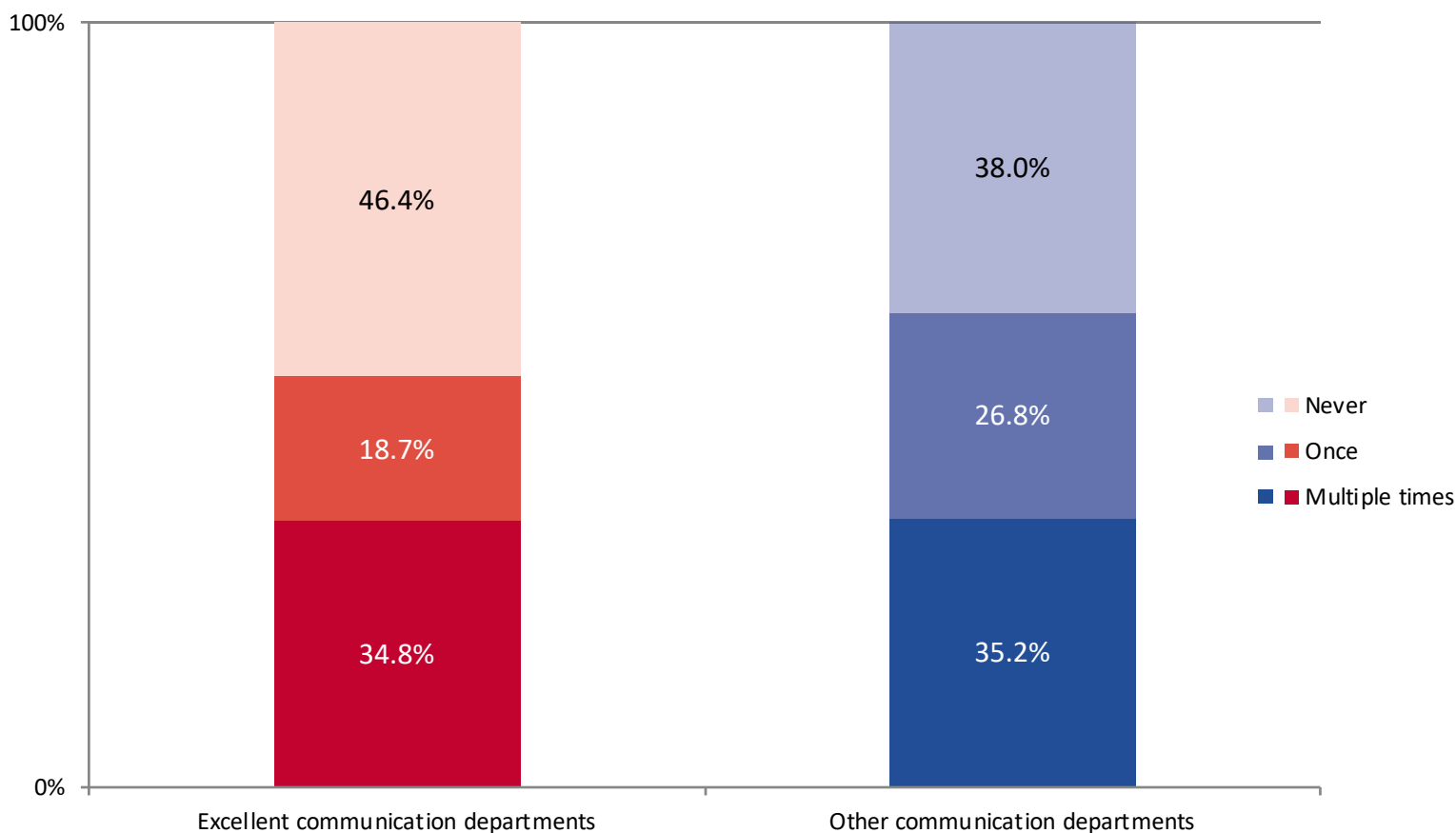


www.communicationmonitor.eu / Zerfass et al. 2020 / n = 1,574 communication professionals in communication departments across Europe.

Q4: Organisations are nowadays increasingly threatened by cyber attacks as well as data theft, manipulation and fraud. Thus, cyber security becomes a highly relevant issue in all fields – including communications. We define cyber security as a set of guidelines, technologies and training that provide protection of an organisation's data and of its computer and digital communication infrastructure. Please rate these statements based on your personal experience: ... Scale 1 (Not at all) – 5 (To a great extent). Frequency based on scale points 4-5. (Highly) significant differences between excellent and other communication departments (chi-square test, $p \leq 0.01$ / $p \leq 0.05$).

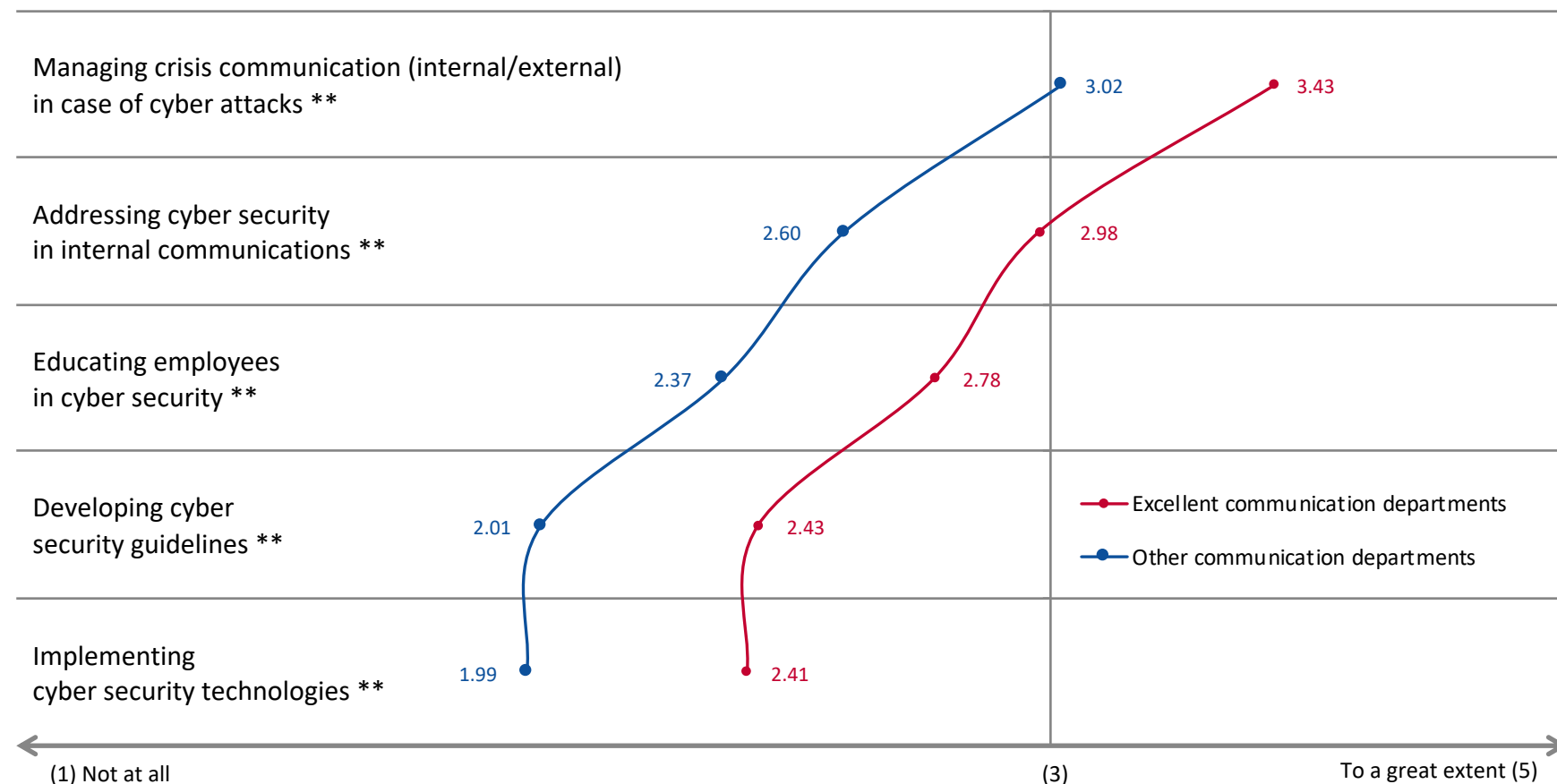
Excellent departments experience less attacks on their organisations by cyber criminals

Has your organisation ever been a victim of cyber attacks or data theft?

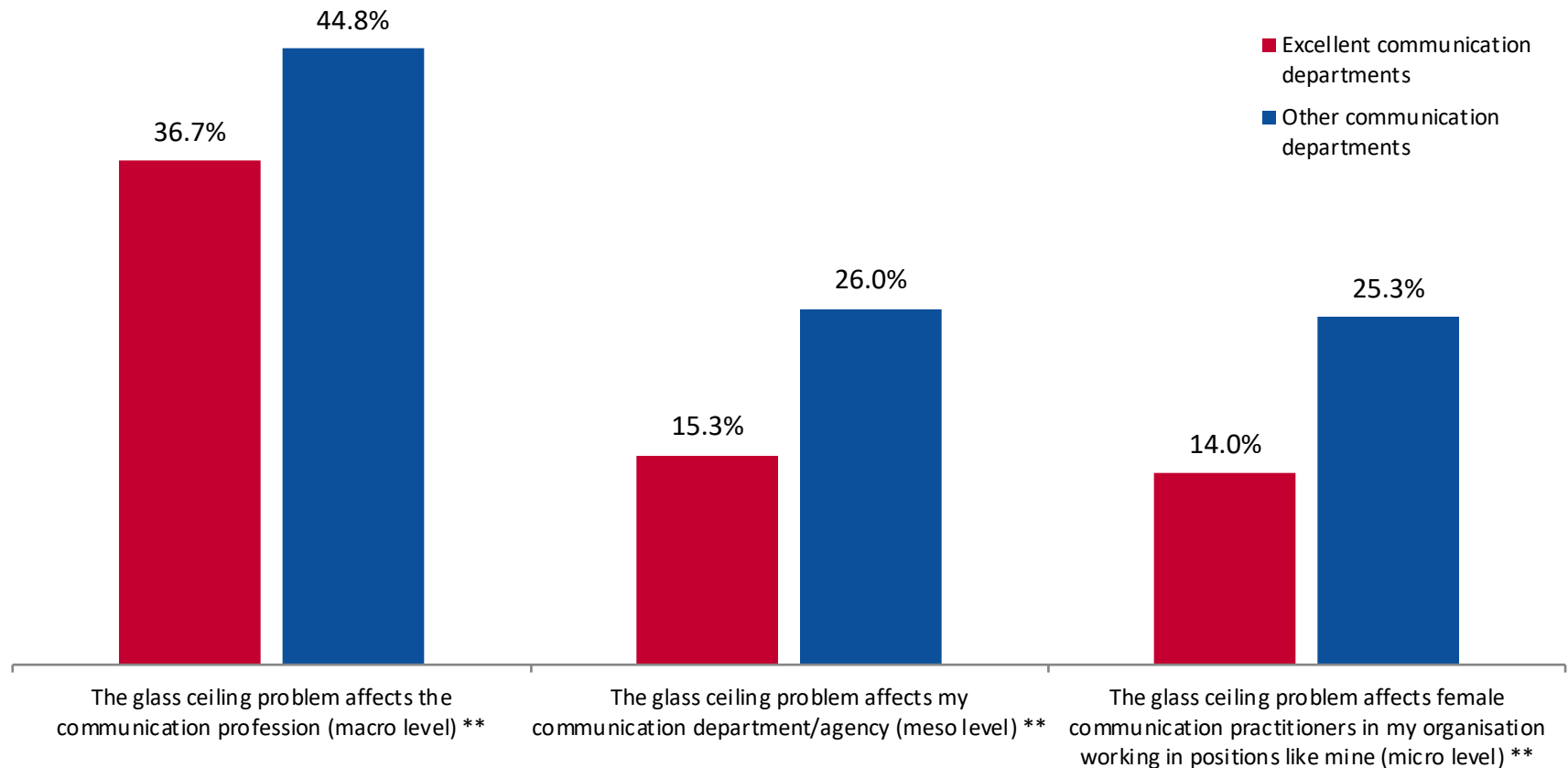


Excellent communication departments are contributing much more to cyber security activities in their organisations

How communication professionals are engaged in fighting cyber criminality for their organisation



Communication practitioners working in excellent departments report less problems with gender inequalities

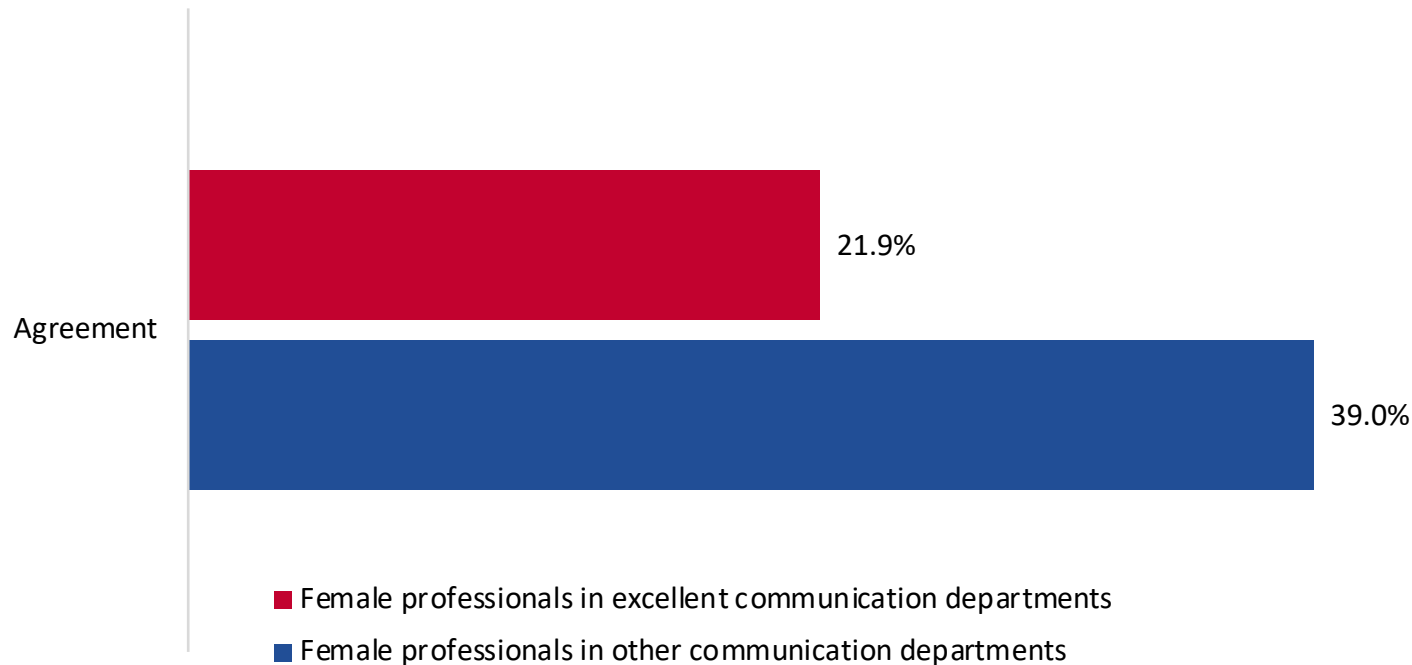


www.communicationmonitor.eu / Zerfass et al. 2020 / $n \geq 1,486$ communication professionals in communication departments across Europe.

Q 9a: In many professions, women are less often found in leading positions. This phenomenon is referred to as the “glass ceiling” – an invisible barrier that keeps female practitioners from rising beyond a certain level in the hierarchy. How do you perceive the situation in the communication profession in your country and in your organisation? Scale 1 (Strongly disagree) – 5 (Strongly agree). Frequency based on scale points 4-5. ** Highly significant differences (chi-square test, $p \leq 0.01$).

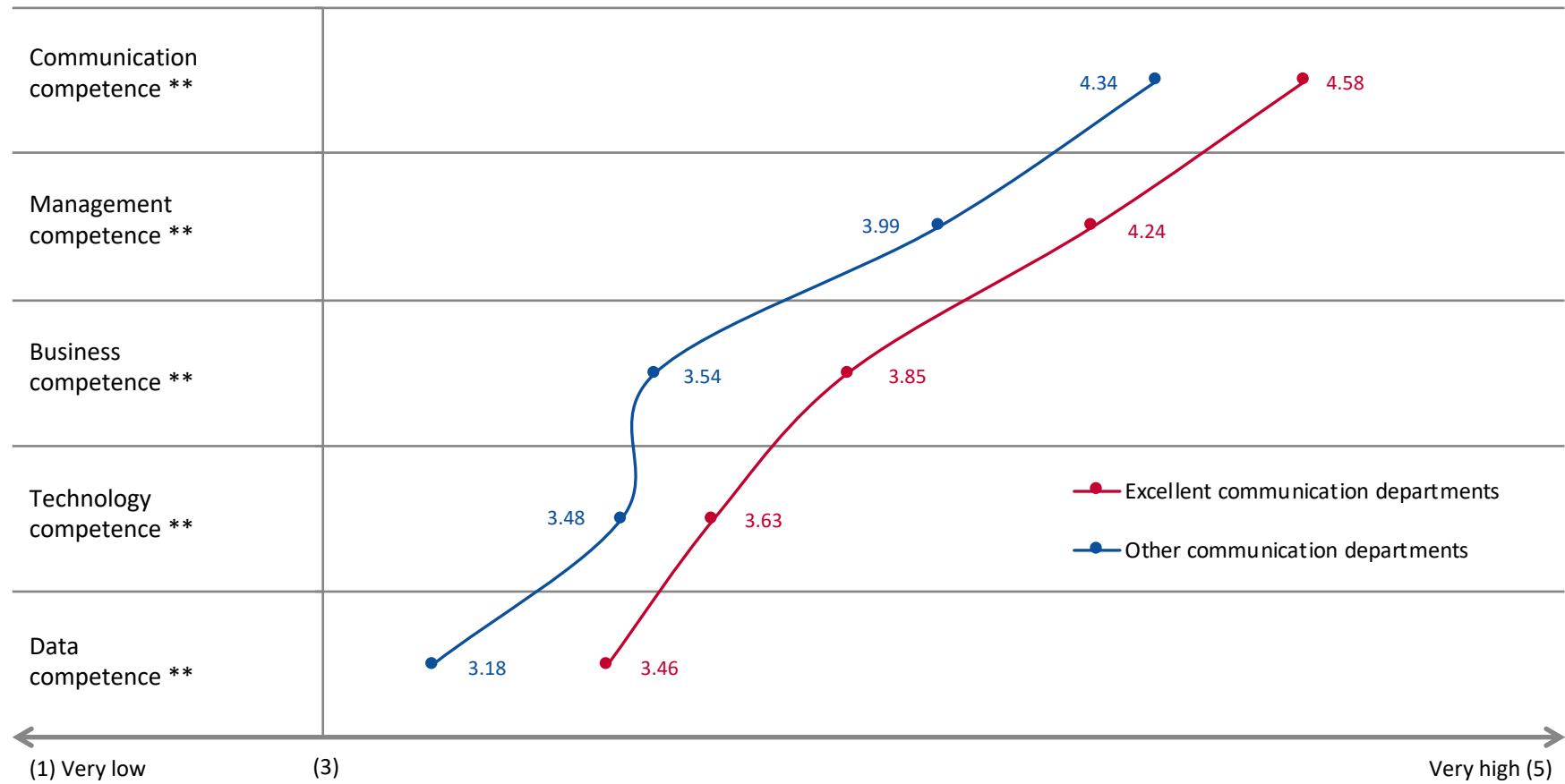
Female professionals working in excellent communication departments are less affected by a glass ceiling problem hindering their career plans

The glass ceiling affects me personally



Practitioners in excellent departments report significantly higher levels of competencies in all dimensions

Personal assessment of competency levels by communication professionals



www.communicationmonitor.eu / Zerfass et al. 2020 / n = 1,562 communication professionals in communication departments across Europe. Q 14: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Mean values. ** Highly significant differences (independent samples T-Test, $p \leq 0.01$).

Smaller skills gap in excellent communication departments – probably because more time is invested in training and personal development

	All communication departments	Other communication departments	Excellent communication departments
	<i>Share of (critically) underskilled practitioners in key competence fields</i>		
Communication competence	31.5 %	35.5 %	25.5 %
Management competence	35.3 %	37.3 %	34.8 %
Business competence	38.0 %	41.0 %	32.4 %
Technology competence	44.4 %	44.9 %	42.0 %
Data competence	50.6 %	53.9 %	47.4 %
	<i>Full days spent on personal training and development per year</i>		
Work time spent on personal training / development	9.1 days	8.0 days	9.4 days
Free time spent on personal training / development	10.0 days	8.6 days	10.1 days
Overall training days in 2019	19.1 days	16.6 days	19.5 days

www.communicationmonitor.eu / Zerfass et al. 2020 / n = 2,306 communication professionals. Q 14: Competencies are based upon knowledge, skills and personal attributes. Some of them might be more important than others. How important are the following competencies for communication practitioners in your opinion? And how do you rate your personal level in each case? Scale 1 (Very low) – 5 (Very high). Mean values. See p. 87 for calculation of skill gaps and share of (critically) underskilled practitioners / n = 1,875 communication professionals. Q 28: In 2019, how many days have you spent on personal training and development in any fields (including further education / studying while working; add part-time to full days)? Q 29: And how many of these days were your free time that you have invested (weekends, holidays, evenings, ...)?

Excellent departments emphasise the need to explore new ways of content creation and distribution as a top three issue for the field in the near future



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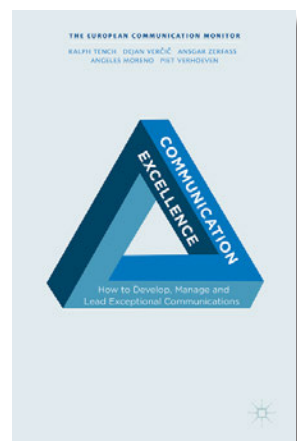
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