EARNED MEDIA RISING

2019 GLOBAL COMMS REPORT

THE PATH TO PROGRESS

While challenges still remain, the third annual PRWeek/ Cision global survey reveals that greater investments in data and some shifts in social and media strategy are helping comms underscore its value to the bottom line

THE STORY GETS STRONGER

New platforms are amplifying brand messages. Traditional media-engagement tactics remain part of the playbook. As evidenced by the third annual PRWeek/Cision Global Comms Report, these factors combine to bolster earned media's prowess to the C-suite.

By Chris Daniels

Maybe every generation of PR pros believes the discipline is more important to companies than it was during the one that came before it. However, this era's sentiment is supported by new data that shows earned media significantly grew its slice of the media-budget pie in 2019.

Its portion was almost on par with paid media, according to the third annual 2019 PRWeek/Cision Global Comms Report. Of the 527 global respondents, on average 34% of the overall media budget goes to earned media, just a tick under the 35% given to paid media. Owned media is allotted the remaining 31%.

Looking at U.S. respondents only, earned media's prevalence is even more apparent. Notably more budget goes to earned (39%) than paid (31%) – the latter which has seen its share growth plateau since 2018 and now sits near owned media, which has 30% of the spend in the U.S.

Hyundai has invested in a software solution that gives more calculated, realistic and, thus, meaningful numbers on media impact. The solution accounts for factors such as a story's timing and placement.

"In the past, we'd place a story on Motortrends.com and say we reached 1.2 million people," adds Trainor. "Now, we might more accurately say we reached 300,000 consumers."

While the number is lower than media impressions, "when you explain why to the C-suite they go, 'Hey, this isn't just some made-up crap and every possible impression added up,'" he explains. "The C-suite is very into math and results. So, they are like, 'Woah, the PR team has traditionally been afraid of numbers, but they are finally talking the language that sales, marketing, finance and everyone else speaks.' A lot of respect comes with that."

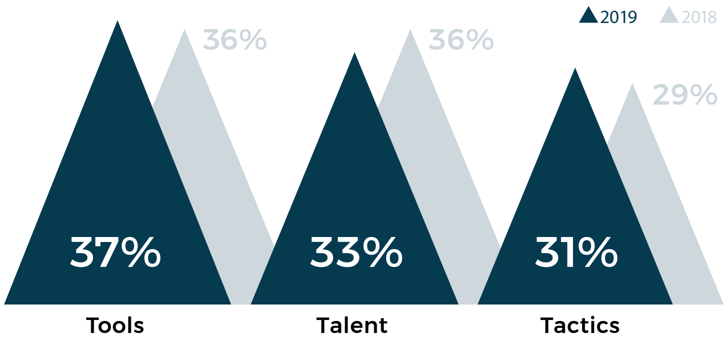
Credible results

In interviews with PRWeek, in-house counsel in the U.S. attribute the results to a number of factors, chief among them the much-needed improvement and adoption of analytical and measurement tools that the PR function is having customised to its specific business needs. This has helped give comms new credibility and respect from the C-suite.

"It drove me crazy that we might generate 800 legitimate media stories from being at an auto show and then stand in front of our executives and say something like, 'We had 28 billion impressions,'" says Jim Trainor, director of comms at Hyundai Motor America. "It was pretty meaningless because nobody could really get their head around the number. They would be like, 'So, is 19 billion impressions crummy?'"

Seeking and seeing improvement

In which of the following areas do you feel you could improve the most in terms of your use of technology and data?



Key takeaway: The year-on-year "Talent" data indicates increased confidence in staff's tech and data capabilities.

Comms drive decisions

Meanwhile, analytics are helping inform corporate decision-making on positioning and issues in which to step in front of or back from.

Johnson & Johnson monitors and analyzes everything being said about the company in the media across 100 different languages. This aggregated content is presented to Ernie Knewitz, VP of global media relations, in a real-time dashboard on his corporate devices.

With roughly 4,000 media stories mentioning J&J every week, the analytics system helps support or inform "a lot of our decision-making," he says. "Data drives decisions. In investments, R&D, marketing, even baseball lineups. It also helps companies understand conversations and where the brand sits in those conversations. That's important to know when shaping messages."

For the third year in a row, respondents say the two biggest challenges in their positions are tightening budgets (21% choosing it as their top challenge, 57% putting it among their top three) and inability to effectively measure comms' impact (20%, 54%).

Megan Tweed, EVP and U.S. head of performance communications at Edelman, says it will take fundamental change management for many comms departments to deal with both challenges.

"One of the biggest things for comms is to reorient itself around audience," she advises. "For years it has been around the media and reporters, with audience being secondary. Marketing has wrapped itself around technology and strategy with the idea of providing a centralised view of the customer. The more that comms can contribute performance data to that view of the audience, the more chance they will see their investment grow and opportunities to play alongside marketing in a very accountable way."

And this doesn't take a huge investment into measurement and analytic tools, Knewitz points out. "Maybe 15%" of his comms budgets goes to this area.

Instagram comes of age

The 2019 PRWeek/Cision report also ascertains the media channels most important to PR pros – and reveals one getting much more attention this year.

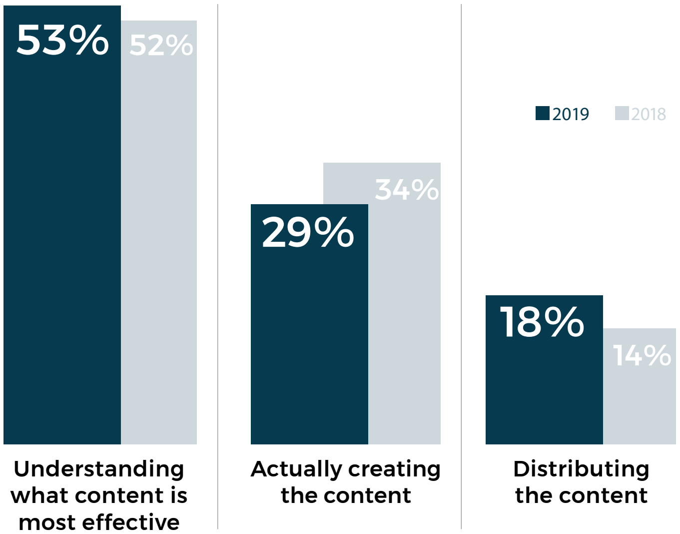
In the past two surveys, global respondents clearly put Facebook and Twitter on top when asked to identify the social channels most vital to their broader content strategy. Very little changed between the first and second year. This year, it's a different story.

While 72% of respondents place Facebook among their top three channels this year and 35% choose it as their top channel – thus still by far the most popular choice – those numbers are notably down from 77% and 44% in 2018.

Meanwhile, Twitter's year-on-year movement is scant, with 55% placing it among their top three channels both years, while only ticking up year on

Not content with distribution

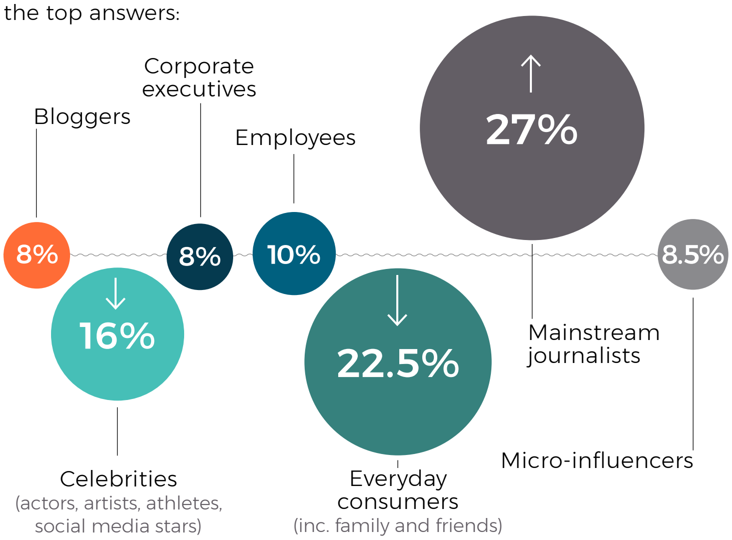
Which of the following is your biggest challenge with content?



Key takeaway: Confidence seems apparent in the ideation and creation of content. However, year on year, content distribution appears to be an increasing struggle.

Who has the most influence?

When asked to select the type of influencer most effective at impacting consumer behaviour, the following represents the top answers:



Three biggest movers from last year:
Celebrities fell from **22%**; everyday consumers fell from **27%**; mainstream journalists increased from **16%**.

ABOUT THE GLOBAL COMMS REPORT

In 2017, inspired by the notable and continuing evolution in how PR is both practiced and perceived, Cision and PRWeek joined forces on an initiative to clearly identify and more deeply understand communicators' use of/interaction with technology, data, measurement, content, and influencers.

An in-depth global survey was distributed to senior-level communicators and marketers in the U.S., Canada, U.K., France, Germany, Sweden, and China (including Hong Kong).

Now in its third year, the **PRWeek/Cision Global Comms Report** highlights challenges and opportunities with tools, talent, tactics, budgets, and more. In the process, the study continues to bring clarity to the areas in which PR is making real progress, as well as where it needs to make more.

year from 13% to 14% in those who chose it as their top channel. All good enough to be the second most popular channel in 2018. Not so this year.

Overtaking it is Instagram, which celebrated its ninth birthday this October and reached 300 million users this past August, representing growth of 50% in the past nine months alone.

Instagram sits among the top three channels of 57% of this year's respondents, up from 45% last year. Meanwhile, 22% choose it as their very top channel, up from 9% last year.

Emily Horn, director of corporate communications at HP, says the tech giant has enthusiastically added Instagram to its content mix. HP uses the photo- and video-sharing site "to connect with people about our core brand commitments, such as sustainability and diversity, but also to launch products and drive sales through organic and paid media."

"And the global reach is crucial," she notes, adding that Instagram has become "a primary social platform for HP, especially given our common love of capturing moments and making emotional connections."

Traditional approach still working

While PR pros continue identifying new channels and tools to tell stories, when it comes to media engagement, traditional journalists remain very prominent.

Among respondents, 61% say engagement efforts are focused on traditional journalists/media (up from 58% last year). In turn, 39% are devoted to "newer" influencers (down from 42% in 2018). This finding, along with the 67% of respondents who deem the press release as a major tool for media communications, shows that both traditional media and tactics are alive and well.

Newspaper circulation may be at historic lows and broadcast media fragmented. Still, Knewitz notes that "mainstream reporters have increasingly become opinion leaders and still set the agenda for a lot of public and social discourse. Social media reacts to their coverage. That dialogue often starts with mainstream journalists. You see it in reverse, too, with mainstream reporters covering what is being said on social. There is real synergy between traditional and social media."

Like J&J, Hyundai works with influencers, but keeps a major emphasis on relationships with traditional journalists. That is reflected in how often the carmaker puts out news releases. "We still write five to seven a week," says Trainor. "They serve a lot of purpose."

He notes that thousands of journalists have signed up for the company's news alerts, representing media from Reuters and Bloomberg to *Car and Driver*. Hyundai also makes sure the release includes a lot of snackable content that can be posted on social media, such as video, photos, memes and so on. (This can also help releases stand out, which respondents cite as their biggest challenge with press releases.)

"Even if they just see, as an example, that our Santa Fe vehicle won an award in an alert on their mobile phone from the headline of one of our releases," Trainor points out, "then I've reached them." ■

Noteworthy year-on-year changes

67% of in-house departments report they are part of the marketing function, up from **63%** last year

42% of in-house respondents say "excellent" when asked to describe their department's relationship with the CEO; **36%** did so last year

62% place social media among their top three forms of content most effective at influencing purchase behavior, up from **54%** last year

49% feel they can always effectively identify the right influencers to target on all initiatives. That is down from **54%** last year

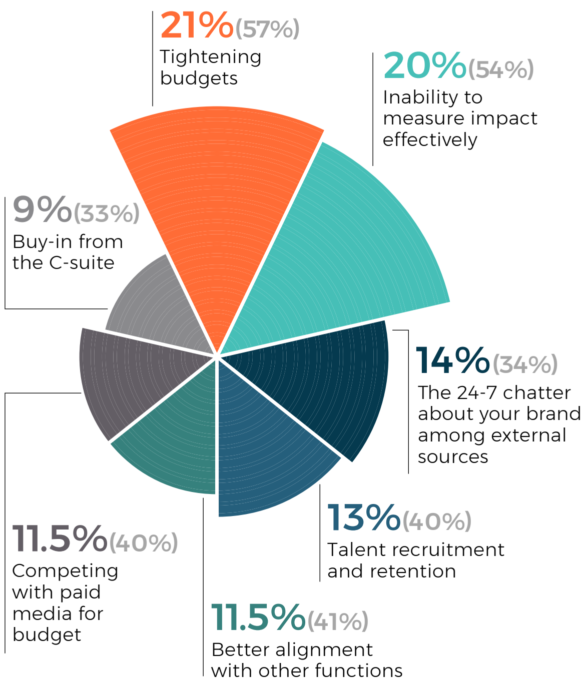
54% make a concerted effort to stay in touch with media/influencers, even when there is no current story to be covered. That is well down from **68%** last year

THE REAL CHALLENGE

From tightening budgets to C-suite buy-in, comms faces numerous challenges as it seeks to perform optimally. ***But which is the biggest one?***

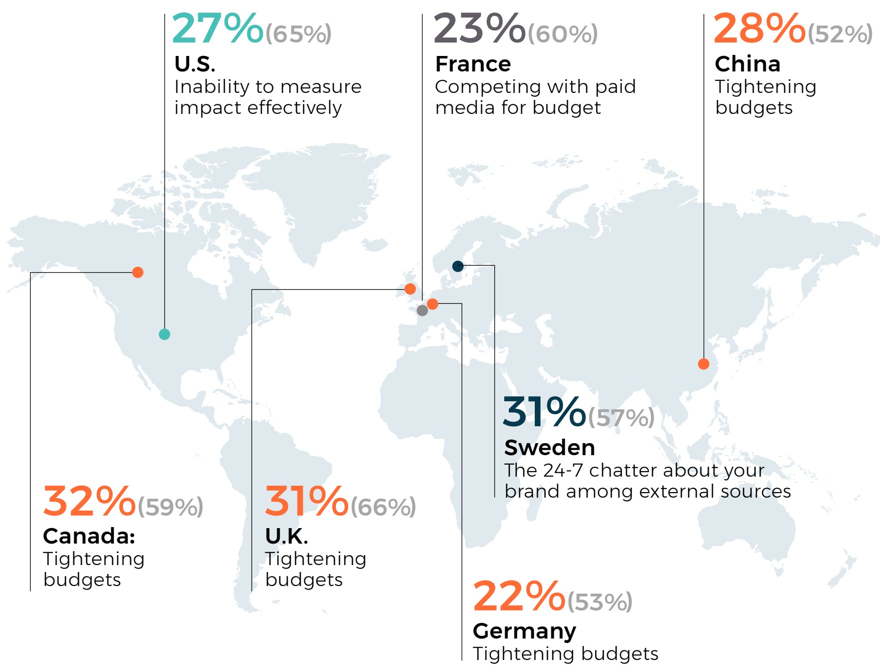
Globally, when asked to identify their single biggest comms challenge:

(The numbers in parentheses indicate top-three responses.)

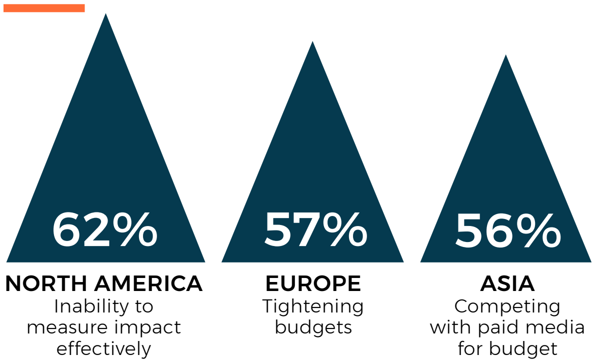


By country, the following represents the single biggest comms challenge:

(The numbers in parentheses indicate top-three responses.)



By region, the following represents the comms challenge that was most often placed in the top three:



What changed in a year

- Not only have **tightening budgets** and **inability to measure impact effectively** remained the two biggest challenges, as they were in 2018, but they seem to be even more so this year.

  Tightening budgets was placed in the top three by **57%** of respondents this year, up from **51%** last year.

  Inability to measure impact effectively was placed in the top three by **54%** this year, up from **50%** last year.

- Last year, **17%** of global respondents chose **talent recruitment and retention** as their single-biggest challenge. That number fell to **13%** this year, indicating more confidence in the comms staffers organisations are hiring and maintaining.

- **Buy-in from the C-suite**, while the least challenging matter both last year and this, did tick up year on year. In 2018, **6%** of respondents chose it as their single-biggest challenge. This year, **9%** did so.

OBSERVATIONS	While **tightening budgets** is the biggest challenge globally, it's noteworthy that, when viewed as responses chosen among the top three, a different challenge is cited in each of the three global regions. Meanwhile, among the seven countries surveyed, four different responses were chosen as the single-biggest challenge.

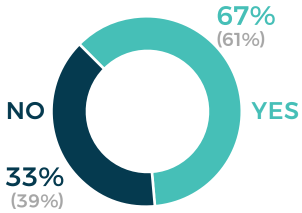
DECIPHERING THE DATA

On these pages, we have clearly established the huge role data and analytics play every day in comms. ***But are our respondents truly gleaning the information they need to impact their business?***

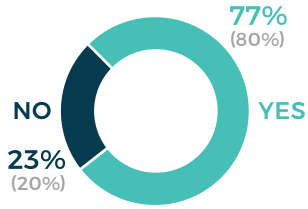
Recognizing consumer activity

Our respondents were asked about their confidence level in gaining information about four specific potential consumer activities facilitated by their earned media content.
(The numbers below indicate those who said they have a strong sense. The numbers in parentheses are last year's responses to the same query.)

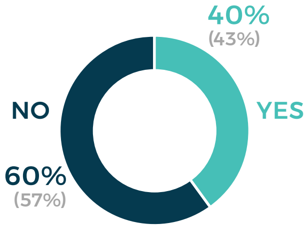
How many people actually read the content?



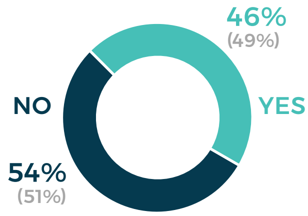
How many people clicked a link within the content?



What people do after they consume the content?

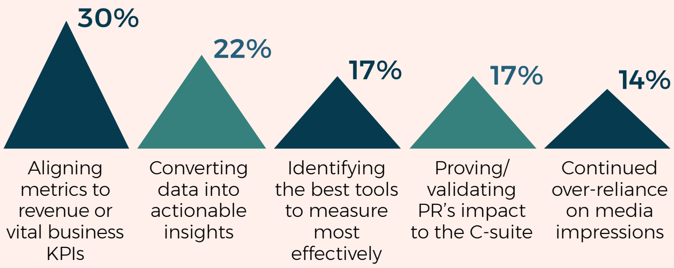


Was there any digital or real-world behavior driven from the content?



PINPOINTING THE PROBLEM

Respondents had a list of five PR measurement challenges and asked to rank them from most to least difficult:



Comms vs. marketing

The percentages below compare how many communicators and marketers said YES when asked the same four questions as indicated on the left.

How many people actually read the content?

COMMS 64%
MARKETING 75%

How many people clicked a link within the content?

COMMS 72%
MARKETING 88%

What people do after they consume the content?

COMMS 36%
MARKETING 52%

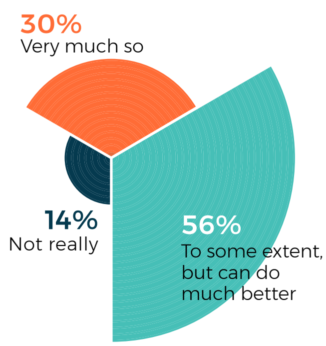
Was there any digital or real-world behavior driven from the content?

COMMS 45%
MARKETING 56%

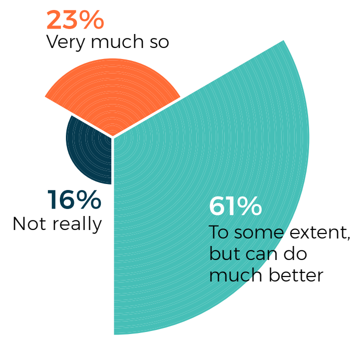
Key takeaway: In all four cases, marketers seem to have a stronger sense than their comms counterparts as to how content impacts consumer activity.

Thinking about your current earned media analytics capabilities, are you.....

Able to measure your brand's share of voice compared to your competition?



Able to identify the business impact of specific outlets where you've received coverage?



OBSERVATIONS

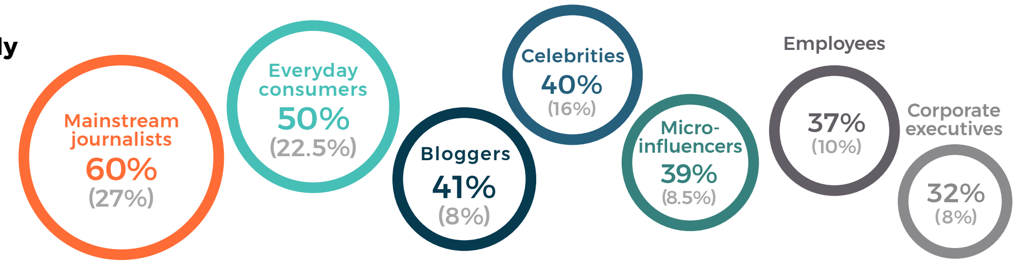
The **30%** who ranked **aligning metrics to revenue or vital business KPIs** as their toughest comms measurement challenge is very much in line with the year-on-year dip in respondents' confidence in knowing what **people do after they consume content** and **whether or not there was any real-world behavior driven from that content**. All combined, this amplifies how great that challenge remains.

SWAY OVER SPENDING

There are various types of influencers who impact how consumers think about products and services and, in turn, their purchasing activity. ***But which influencers have the most powerful voice in this regard?***

Numbers on this page indicate the types of influencers respondents put in their top three in terms of impacting consumer behavior
(Numbers in parentheses indicate the percentage of respondents who chose that type of influencer as their very top choice this year)

Globally



Country by country

	U.S.	Canada	U.K.	France	Germany	Sweden	China
Mainstream journalists	69% (34%)	39% (15%)	48% (23%)	51% (23%)	67% (28%)	46% (11%)	54% (14%)
Everyday consumers (inc. family and friends)	49% (23%)	66% (24%)	55% (23%)	31% (11%)	56% (36%)	46% (20%)	54% (16%)
Bloggers	36% (4%)	59% (15%)	43% (15%)	63% (17%)	22% (6%)	31% (9%)	50% (8%)
Celebrities (actors, artists, athletes, social media stars)	37% (11%)	44% (17%)	32% (11%)	37% (26%)	39% (6%)	46% (20%)	68% (44%)
Micro-influencers	48% (11%)	37% (7%)	28% (3%)	46% (6%)	17% (3%)	37% (17%)	26% (4%)
Employees	34% (9%)	32% (10%)	52% (17%)	43% (11%)	47% (6%)	54% (14%)	16% (8%)
Corporate executives	28% (7%)	24% (12%)	42% (8%)	29% (6%)	53% (17%)	40% (9%)	32% (6%)
	Mainstream journalists as a top answer, scored notably higher in the U.S. than any other country	Everyday consumers as a top-three answer, scored notably higher in Canada than any other country	Celebrities as a top-three answer, scored notably lower in the U.K. than any other country	Bloggers as both a top and top-three answer, scored higher in France than any other country	Corporate executives as both a top and top-three answer, scored notably higher in Germany than any other country	Micro-influencers as a top answer, scored notably higher in Sweden than any other country	Employees as a top-three answer, scored notably lower in China than any other country.

OBSERVATIONS

The data certainly underscores the impact **mainstream journalists** have over consumer behavior, more than any other type of influencer. However, some year-on-year changes also merit attention. **51%** of last year's global respondents placed **celebrities** among their top three. This year, only **40%** did. Meanwhile, only **25%** of last year's respondents placed **corporate executives** among their top three. This year, **32%** did so.

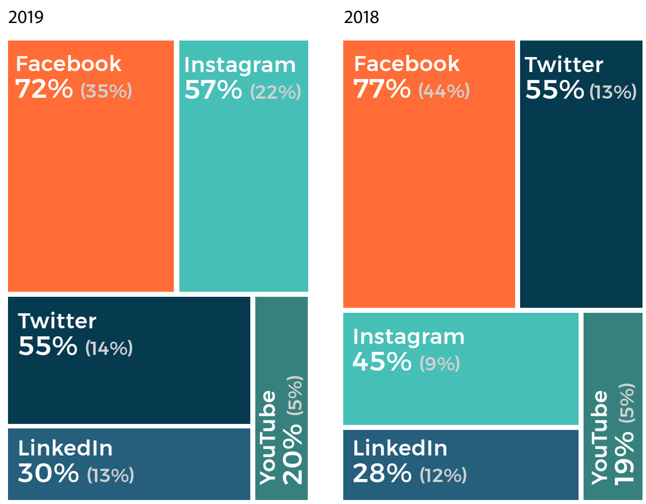
CHANGING THE CHANNEL

The social media channels atop respondents' lists of those most relevant to their broader content strategy have not changed year on year. However, notable movement among those platforms is apparent, as is the fact that certain channels are very popular in some countries, not so much in others.

Global

The percentages indicated on the right reveal how many respondents placed that channel among their top three, with the numbers in parentheses indicating how many respondents cited that channel as their very top choice.

Key takeaway: The big story is the notable rise of Instagram, which passed Twitter (basically flat year on year), and is now second to Facebook (which, while still firmly in the top position, did drop five percentage points year on year).



INSTAGRAM: THENEWSECRETWEAPON

28%

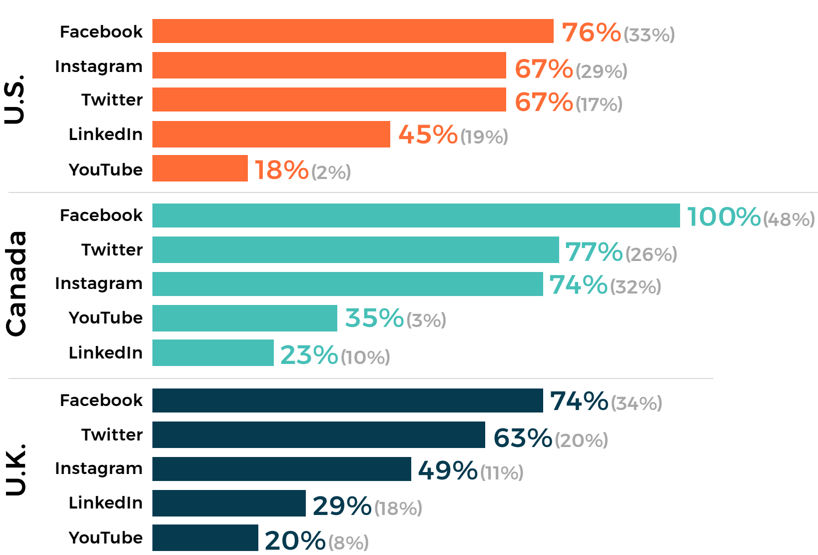
of global respondents who reported adding a new social channel to their content mix in the past year identified Instagram as that platform. Of U.S. respondents to add a new channel in the past year,

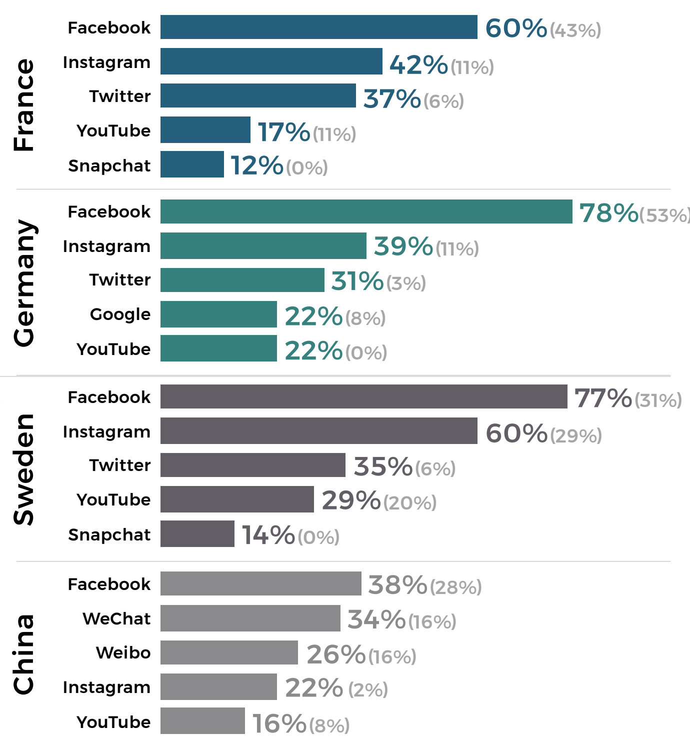
43%

named Instagram.

Country by country

The following percentages indicate how many respondents in each country placed that channel among their top three, with the numbers in parentheses indicating how many respondents cited that channel as their very top choice....





OBSERVATIONS	**Instagram**'s rise is clearly evident on a country-by-country basis, too. Last year, **Twitter** outpaced Instagram in 4 of the 7 countries surveyed. This year, Twitter only outpaces it in two (Canada and the U.K.). As for **LinkedIn**, last year it was a top-five channel in all countries surveyed except for China. This year, it only makes the top five in three countries (U.S., Canada, U.K.).

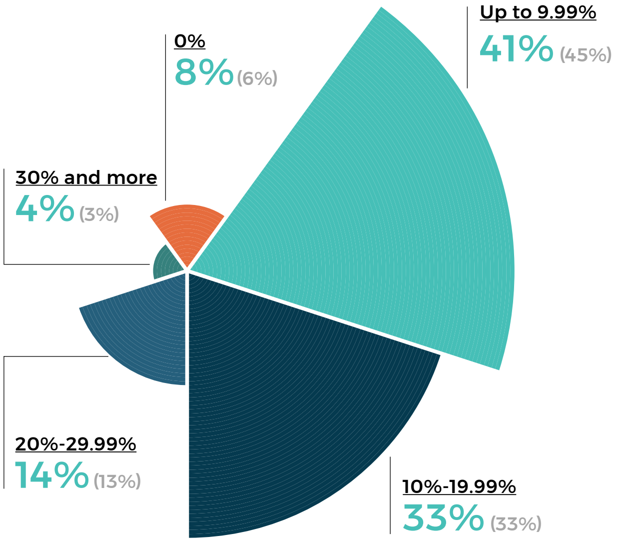
WHERE THE MONEY GOES

Whether it's devoting the necessary resources to data and analytics or determining your brand's stance on paying influencers, comms teams today have numerous financial decisions to make that their predecessors did not.

Financial commitment

What percentage of your annual budget does your company devote to measuring/monitoring/understanding the impact of its comms programs?

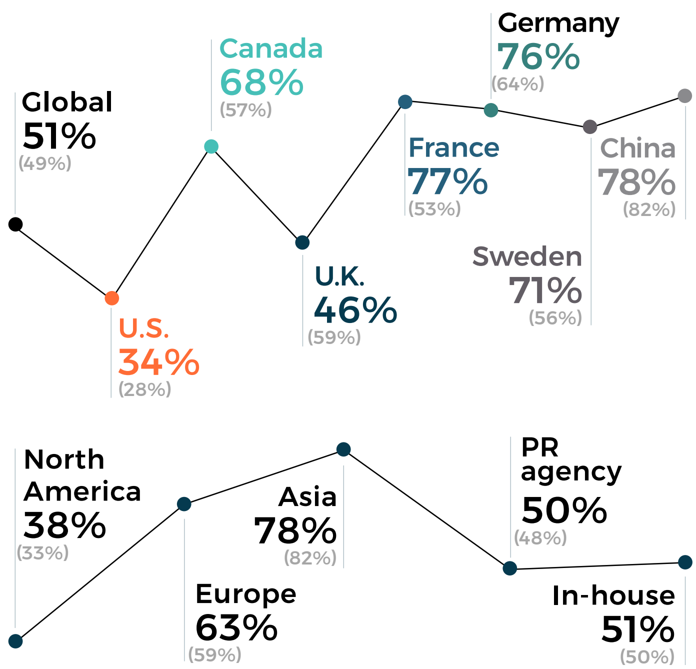
(The numbers in parentheses indicate last year's percentages.)



Double-digit devotion

The following indicates the percentage of respondents who devote at least 10% of their annual budget to measuring their comms programs.

(The numbers in parentheses indicate last year's percentages.)



This year, **18%** of respondents devote

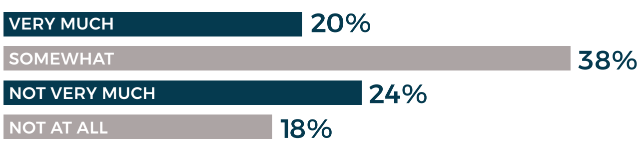
20% or more

of their annual budgets to measurement. That's up from **16%** last year.

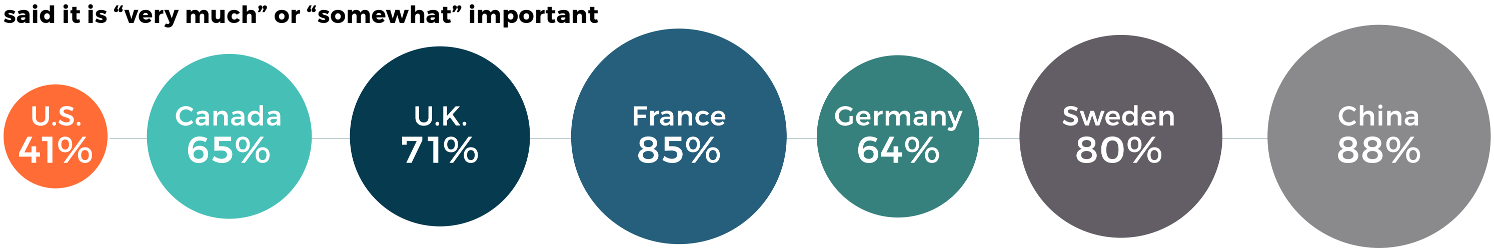
20%

Paying influencers

Is it an important part of your strategy?



The below indicates, country by country, those who said it is "very much" or "somewhat" important



OBSERVATIONS	Year over year, by almost all accounts, **brands are devoting a higher percentage of their annual budgets to measurement**. Even in the U.S., where the percentage of those devoting at least **10%** of their annual budget is lowest, it is still up six percentage points from last year. Meanwhile, **58%** of global respondents pay influencers to a notable degree, up from **54%** last year. However, the practice is far less popular in the U.S. than in any other country surveyed.

KEY TAKEAWAYS

Throughout these pages, the **2019 PRWeek/Cision Global Comms** report shared data that underscores where the comms industry has made real progress in its use of data, technology, measurement and content – and where more progress still needs to be made. **Below we highlight 10 of the study's most interesting findings.**

34% of global respondents' overall media budget goes to **earned media**, up from **26%** last year. **35%** is given to **paid media**, with **owned media** allotted the remaining **31%**. **In the U.S., 39%** of the overall media budget goes to **earned media**.

57% place **tightening budgets** among their top three biggest challenges, with **21%** naming it their top challenge. **Inability to effectively measure comms** is not far behind, as **54%** place it among their top three biggest challenges, **20%** cite it as their top one.

67% of **in-house communications departments** note they are **part of the marketing function**, up from **63%** last year. Additionally, **42%** of in-house respondents say **"excellent"** when asked to describe their **relationship with the CEO**, an increase of six percentage points from last year.

61% report their engagement efforts are focused on **traditional journalists/media**, up from **58%** last year. Meanwhile, **39%** of their efforts are devoted to **"newer" influencers**, down from **42%** last year. Meanwhile, **67%** suggest the **press release** remains a major media-communications tool.

57% name **Instagram** among their top three **most important social channels** in terms of their **broader content strategy**, with **22%** citing is as their very top such platform. Those numbers represent a 12-percentage-point and 13-percentage-point year-on-year increase, respectively.

60% admit a **lack of confidence** in knowing **what people do after they consume their brand's earned media content**. Simultaneously, **54%** do not have a strong sense of whether or not there was any **digital or real-world behavior driven from their brand's earned media content**.

30% select **aligning metrics to revenue or vital business KPIs** as their **single-most-difficult PR measurement challenge** among a list of five options. **Converting data into actionable insights** is next at **22%**.

60% choose **mainstream journalists** among their top three **most powerful influencers in terms of impacting consumer behavior**, with **27%** picking them as the most powerful such influencer. This sentiment is strongest in the **U.S.**, at **69%** and **34%**, respectively.

51% devote at least **10%** of their annual budget to **measuring/monitoring/understanding the impact of their comms programs**, with **18%** of them spending at least **20%** of their annual budgets on this. Both numbers represent year-on-year increases.

58% say "very much" (**20%**) or "somewhat" (**38%**) when asked if **paying influencers** is an important part of their strategy. When viewed country by country, the practice is most prevalent in **China** and **France**, where **88%** and **85%**, respectively, say "very much" or "somewhat."

Methodology

PRWeek partnered with Cision on this survey, which was sent via email to both communications and marketing professionals in seven countries around the world: The U.S., Canada, U.K., France, Germany, Sweden, and China (including Hong Kong). A total of 527 senior-level professionals, from both agencies and in-house, completed the online survey, conducted by Bovitz, between July 11 and August 12, 2019. Results are not weighted and are statistically tested at confidence levels of 90% and 95%.

About Cision

Cision Ltd (NYSE: CISN) is a leading global provider of earned media software and services to public relations and marketing communications professionals. Cision's software allows users to identify key influencers, craft and distribute strategic content, and measure meaningful impact. Cision has over 4,000 employees with offices in 22 countries throughout the Americas, EMEA, and APAC. For more information about its award-winning products and services, including the Cision Communications Cloud®, visit www.cision.co.uk and follow Cision on Twitter @CisionUK.

About PRWeek

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