

2018 GLOBAL COMMS REPORT:

CHALLENGES AND TRENDS

From talent to traffic, content to consumer activity, this second annual Cision/PRWeek global survey tells the tale of how data and analytics are reinvigorating the comms function and its business-wide impact.

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COMMS HARNESSES ITS TALENTS TO STAY AHEAD

From data to content, results from the second annual PRWeek/Cision global survey reveal that PR has an increased commitment to develop the right talents and relationships.

By Chris Daniels

The job of the PR pro is changing due to the amount and availability of data. In turn, much focus is now placed on identifying the best tools to harness all that intelligence.

This second annual PRWeek/Cision global survey, however, reveals a twist that underscores a rising commitment to getting data right. When the 410 senior-level marcomms leaders who took the survey were asked to identify the areas they need to improve upon most in terms of technology and data, "talent" was tied with "tools" as the top answer at 36 percent. "Tactics" scored 29 percent.

In 2017, 41 percent selected "tools," while 32 percent chose "talent." That closing gap indicates a greater recognition that tools need the proper talent to work optimally.

Data-driven skills required

Catherine Blades, chief brand and comms officer at Aflac, says it is critical to have data-savvy staffers and partners.

"My boss and I get so frustrated with reports that show 'Oh, this popped up,' but the data feels so random," she adds. "You need unicorns who can take that data, translate it, make it relevant and turn it into actionable insights that you can measure against business objectives. I want to show my CEO how we've moved the needle."

Paul Gerrard, VP of strategic comms at Blue Cross Blue Shield Association, puts tools and talent on an equal plane of importance, especially given the rise of "dubious reality."

"There are so many dubious conversations online now," he notes. "An organization can be attacked based on false information. The right talent is vital to analyzing the impact on our corporate reputation of what is being said about us. That helps us determine if and when to get involved."

Margarita Miranda-Abate, who leads communications and patient advocacy for Latin America and Canada at Novartis Oncology, says, "We want to be able to say to someone, 'Explain this data set to me.' The reality is I've

Comms challenges remain

77%

indicate that comms still can do a better job at measuring and proving its impact on business objectives

73%

deem "aligning metrics to revenue or vital business KPIs" as the most difficult challenge facing comms measurement

47%

place competing with paid media for budget among their top three most difficult challenges

got to take this back to my business partners in the organization and explain it to them and why it is important."

Revealing a growing sentiment among many industry leaders, Miranda-Abate notes she is a lot more open to hiring a data person without a PR background. This is of particular relevance in an age of integration because, as she adds, Novartis' data analytics team works cross-functionally, including with policy, marketing and medical teams.

Tony Cervone, SVP of global communications at GM, says with all of his hiring decisions now, regardless of department, an understanding of other disciplines is crucial.

"We're building a team that is intellectually curious, has a good basis in comms and is capable of taking on the analytics side," he notes. "We want them to be complemented by data-analytics people who possess some understanding of PR. It is a marriage between the two."

Working better together

Speaking of marriages, the survey delved into the crucial marketing-comms relationship. Encouragingly, 87 percent report their company's PR and marketing departments work well together. Last year, 81 percent said so.

Blades, who added "brand" oversight to her purview a year ago, exemplifies the rising number of leaders determined to improve cooperation between the two functions.

"The team had been struggling to find its footing," recalls Blades, who joined Aflac in 2014. It went through five CMOs in 10 years. She has since hired a VP of advertising and brand, and is about to hire a VP of marcomms.

"I want to tier out the organization and show people a career path, but also push further that alignment," explains Blades. "We need horsepower behind that integrated vision."

PR can no longer afford an "us versus them" mentality. "This historic inferiority complex around the question, 'Who is more important to a company?'" misses the point," explains Cervone. To become a true partner in the business, we must say, 'We're in this together. Let's share the same business results.' That is how barriers can be broken down."

Of course, Rome wasn't built in a day, so tensions still exist. When queried about their most difficult challenges, 47 percent of respondents placed comms' continuing battles with paid media for budget among their top three.

There remain turf wars, but many leaders see that as a reflection of the pressure PR faces to demonstrate its value to the C-suite the way marketing and advertising do.

And that is not a bad thing, as such forward thinking has led to a decreased reliance among PR pros on metrics such as impressions and ad-value equivalencies.

"We constantly need to prove ourselves," Miranda-Abate says. "The fight for budget is really about proving our value and getting the rest of the organization to understand we're an integral part of telling the corporate story."

PR teams are certainly putting more resources into such efforts. This year's survey indicates 16 percent spend at least one-fifth of their annual budget on measuring, monitoring and understanding the impact of comms programs. That is up from 11 percent in 2017. Meanwhile, 49 percent devote at least 10 percent of their annual budget to measurement, a slight uptick from the 47 percent who said so last year.

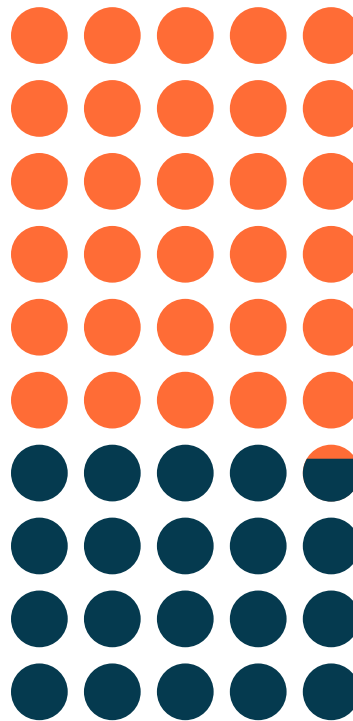
The right channels and influencers

While data is certainly a central focus for comms pros now, the amount of time PR devotes to content — planning, creating and reaching out about it — takes a back seat to nothing. In terms of the channels on which content is shared, this year's survey data reflects an increasing affinity for "modern" channels over "traditional" ones.

Marketing and comms: together or not

63%

of in-house respondents report that comms is part of the marketing function at their brand



37%

of in-house respondents report that comms is independent of marketing at their brand

Content to action

61%

say they have data that gives them a strong sense of how many people actually read the content

80%

have data that gives them a strong sense of how many people clicked the content

43%

have data that gives them a strong sense of what people do after they consume the content

49%

have data that gives them a strong sense of whether there was any real-world behavior driven from the content

When asked to pick the most effective form of content to influence consumer buying behavior, social media easily ranked first, with 54 percent placing it among their top three, as opposed to the 44 percent who did so last year.

Brand websites were put in the top three by 35 percent of this year's respondents (up from 22 percent in 2017), while native ads made the top three among 18 percent of this year's respondents (up 7 percent from last year).

When the focus turned to more "traditional" platforms, the narrative changes. Based on respondents' answers, print features, broadcast features and even traditional ads all fell year-over-year.

In media relations, though, the story isn't totally "new." When asked about their outreach efforts, 54 percent of respondents devote more than half to traditional media, 31 percent devote more than half to social influencers.

"Journalists are critical," Blades adds. "They give credibility to your key target markets."

Gerrard goes a step further by saying traditional media is, in some ways, even more important to brands now.

"A significant number of our audience goes to traditional earned media sources and mixes and matches that with other sources to get their information," he notes.

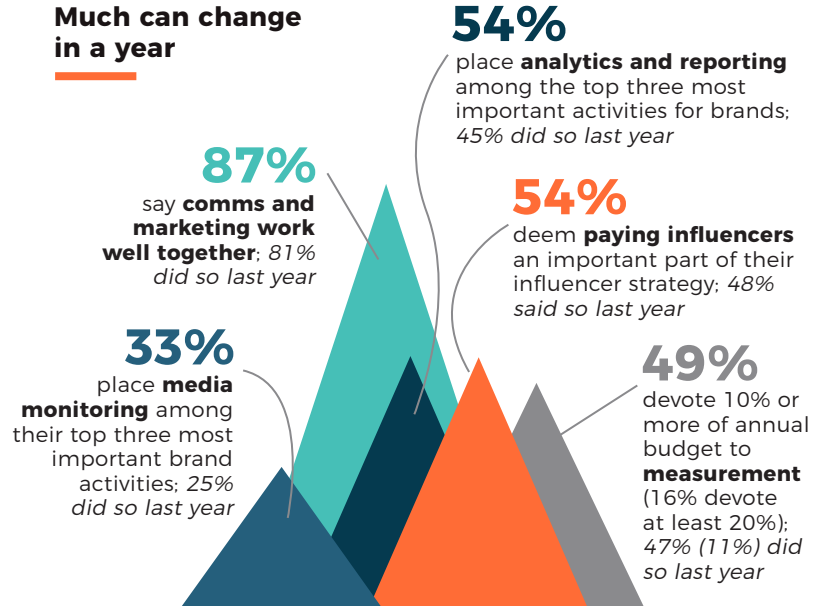
"For all the talk about the rise of social and digital media," continues Gerrard, "it's worth noting traditional media has been evolving by doing some smart things with paid, shared and owned offerings. They are creating digital platforms with interesting and engaging content, from both their own and other sources, and positioning themselves as a curator of trusted content."

Cervone agrees that traditional outlets will remain very important for brands, but as part of a broader media strategy. PR pros must factor that a growing number of major media sources are only talking to and reaching an audience with shared political, geographic and socio-economic characteristics. This is creating an increasingly polarized populace on the earned media environment.

"We must not ignore large chunks of our current and potential customers by only measuring what is being said in what used to be 'opinion-leading media,'" he counsels. "If the polarization of the populace goes to its natural next level, we will end up with 50 percent of our audience reading, watching and listening to certain media."

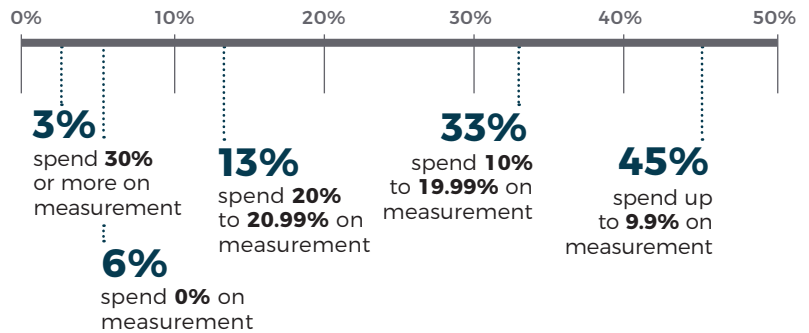
"You can get confirmation bias pretty easily in that kind of environment," adds Cervone. "It will be [interesting] to see who ends up trying to bridge that polarization and create a sense of communication between the two sides. It is so important that we understand who it is certain media are actually talking to, but also the audiences with whom they are not talking." ■

Much can change in a year



The money behind measurement

The following indicates how much our respondents' annual budgets are devoted to measuring/monitoring/understanding the impact of their comms programs:



Brands' preferred social channels

- 77%** placed **Facebook** among their top three channels (with 44% choosing it first)
- 55%** placed **Twitter** among their top three channels (with 13% choosing it first)
- 45%** placed **Instagram** among their top three channels (with 9% choosing it first)
- 28%** placed **LinkedIn** among their top three channels (with 12% choosing it first)
- 19%** placed **YouTube** among their top three channels (with 5% choosing it first)

CHALLENGES FROM EVERYWHERE

The responses offered by the 410 leaders who took this year's Cision/PRWeek survey reflect the numerous challenges PR pros continue to face – and there is no one challenge that broadly dominates.

Globally, **51%** placed tightening budgets among their top three most difficult challenges, followed by “inability to measure impact effectively” (**50%**) and competing with paid media for budget (**47%**)

By country, this is how the above sentiment was expressed:



Local issues

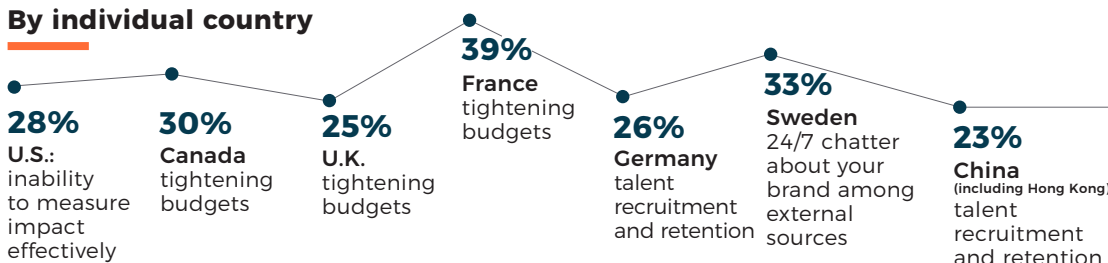
- At **53%**, a higher percentage of U.S. respondents placed “better alignment with other functions” among their three most difficult challenges than any other country.
- At **61%**, a higher percentage of U.K. respondents placed “competing with paid media for budget” among their three most difficult challenges than any other country.
- At **42%**, a higher percentage of French respondents placed “buy-in from the C-suite” among their three most difficult challenges than any other country.
- At **50%**, a higher percentage of Swedish respondents placed “talent recruitment and retention” among their three most difficult challenges than any other country.

Below are the responses chosen as the single-most difficult challenge globally (among seven options given), followed by those chosen in each country surveyed:

Globally



By individual country



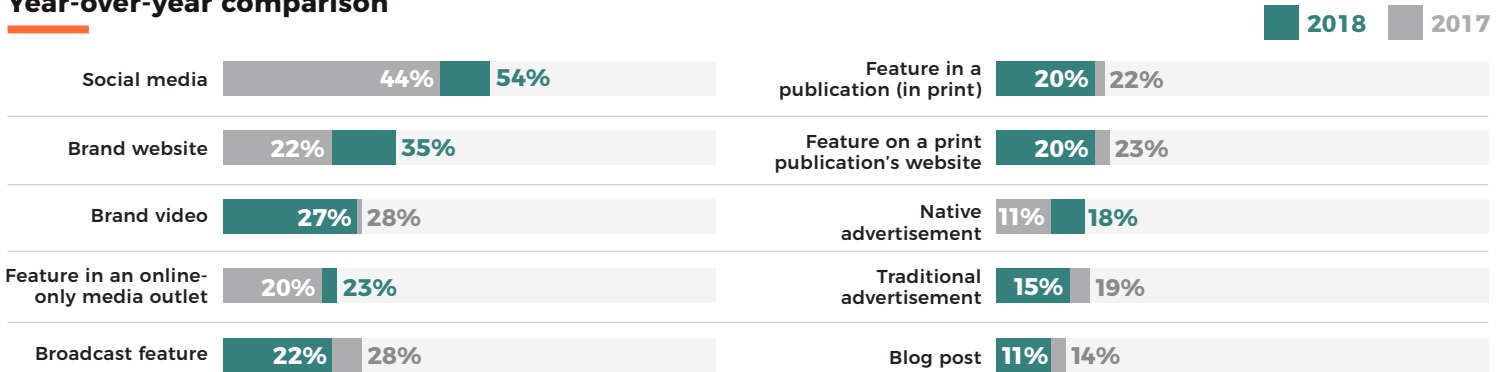
Conclusions

Whether viewed as a top or top-three answer, four of the seven challenges posed to respondents scored highest in at least one nation surveyed. So while the data shows tightening budgets as the toughest challenge overall, there are clearly numerous obstacles comms pros the world over still need help navigating.

CONSUMED BY CONTENT

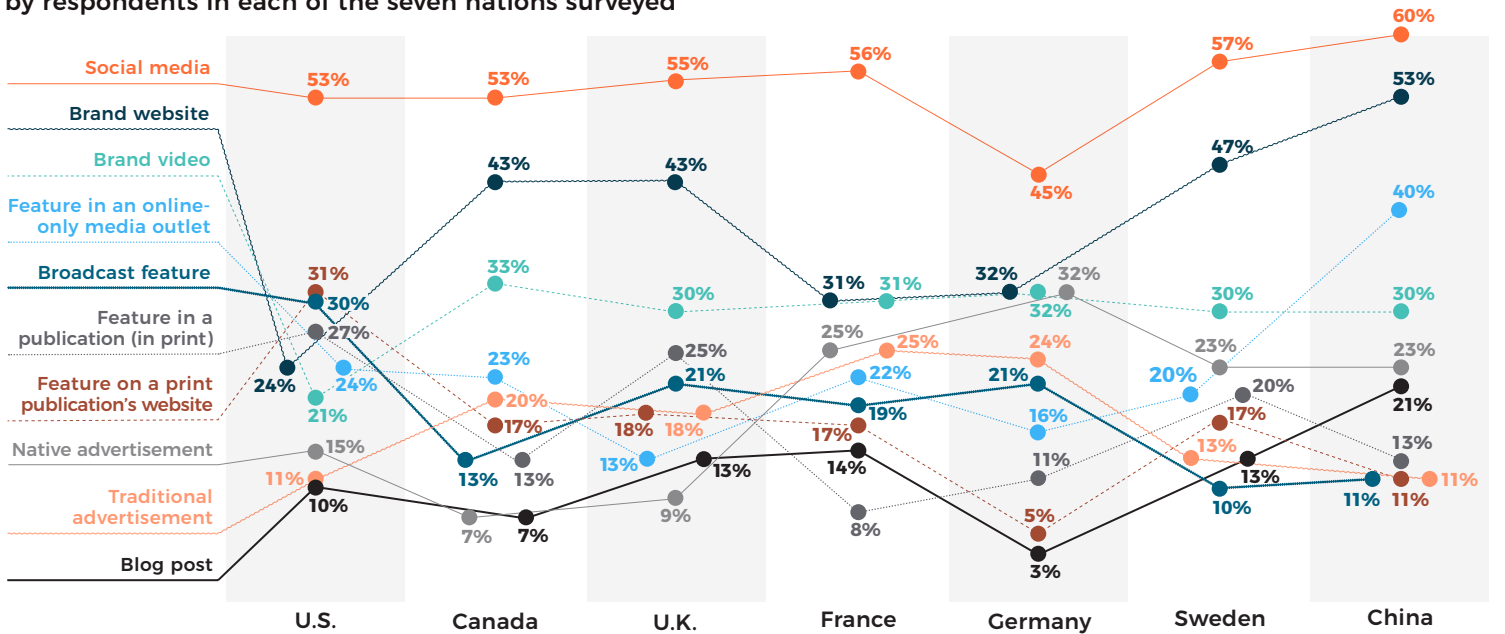
Comms pros devote so much time and resource to content creation. Respondents were given 10 different platforms and asked to identify the three they find most effective at achieving the ultimate result - **influencing consumer-buying behavior**.

Year-over-year comparison



Country-by-country assessment

The following indicates the channels placed among the top three by respondents in each of the seven nations surveyed



Interesting takeaways

At 21%, **brand video** scored notably lower in the U.S. than any other country.

At 25%, **traditional ads** scored higher in France than any other country.

At 21%, **blog post** scored notably higher in China than any other country.

At 32%, **native ads** scored notably higher in Germany than any other country.

Conclusions

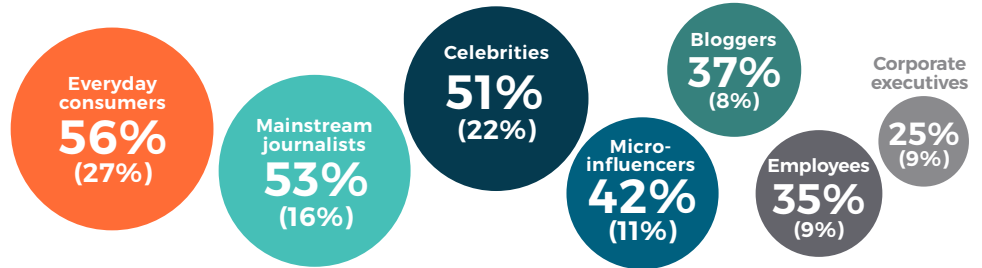
Comms pros seem to be gravitating to more “modern” channels. Social media (+10%), brand websites (+13%), and native ads (+7%) all saw notable year-over-year jumps. Meanwhile, broadcast features (-6%) and traditional ads (-4%) were among the channels to see notable declines from the prior year.

POWERFUL VOICES

There are so many types of influencers who can impact what consumers think, want and eventually buy. But whose voice is most powerful and, thus, might be the best partner for brands to work with? The following provides some insights....

Globally

Numbers on this page indicate the types of influencers respondents put in their top three in terms of impacting consumer behavior (*numbers in parenthesis indicate those who were chosen as their top answer*):



Country by country

	U.S.	Canada	U.K.	France	Germany	Sweden	China
Everyday consumers (inc. family and friends)	61% (38%)	50% (27%)	61% (25%)	39% (14%)	50% (13%)	63% (27%)	53% (13%)
Mainstream journalists	61% (21%)	47% (10%)	40% (7%)	58% (19%)	42% (11%)	43% (20%)	58% (11%)
Celebrities (actors, artists, athletes, social media stars)	46% (15%)	50% (30%)	45% (16%)	61% (33%)	58% (11%)	50% (10%)	68% (49%)
Micro-influencers	54% (11%)	47% (10%)	48% (15%)	19% (3%)	39% (24%)	27% (10%)	19% (2%)
Bloggers	35% (3%)	40% (7%)	45% (19%)	53% (11%)	29% (8%)	30% (10%)	32% (4%)
Employees	31% (6%)	40% (10%)	37% (13%)	42% (6%)	37% (13%)	53% (17%)	26% (4%)
Corporate executives	12% (5%)	27% (7%)	24% (3%)	28% (14%)	45% (21%)	33% (7%)	43% (17%)
	U.S. Mainstream journalists scored higher here than any other country	Canada Smallest gap between top and bottom answer among all countries surveyed	U.K. Largest gap between top two answers among all countries surveyed	France Bloggers scored higher here than any other country	Germany Corporate executives scored higher here than any other country	Sweden Employees scored higher here than any other country	China Celebrities scored higher here than any other country

Conclusions

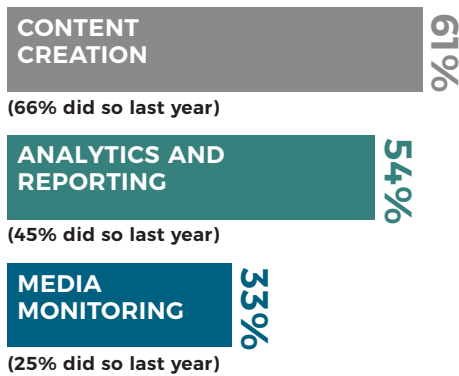
Globally, everyday consumers have the most influence, but mainstream journalists and celebrities are close behind. Celebrities, in fact, are the top group in three nations surveyed (and tied for first in a fourth market). Most significant: each country shows unique sentiments on the various influencer groups, which means they all merit brand attention and respect.

TACTICAL EYE

A key survey goal was to discover how communicators' day-to-day jobs were evolving tactically. Are PR pros truly measuring more? What is the status of their relationships with various influencers? Find out below:

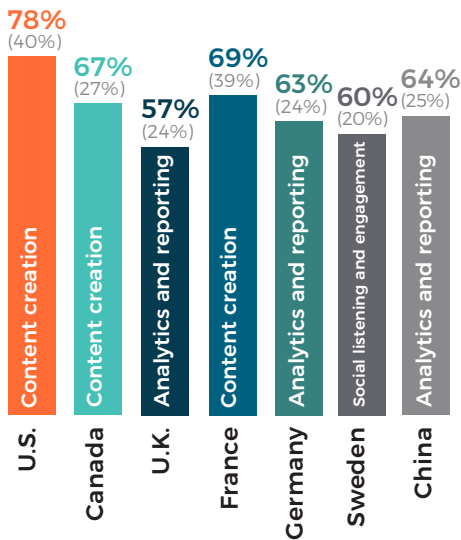
Globally

Percentages below indicate respondents who put that activity among their three most important:



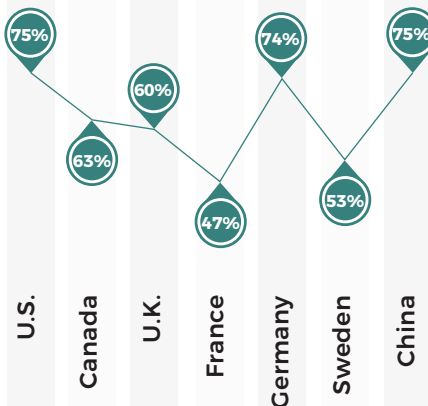
Country-by-country

Below we highlight brand activities ranked in the top three by the most respondents in each country (Percentage of those who ranked each brand activity first in each country is in parenthesis)



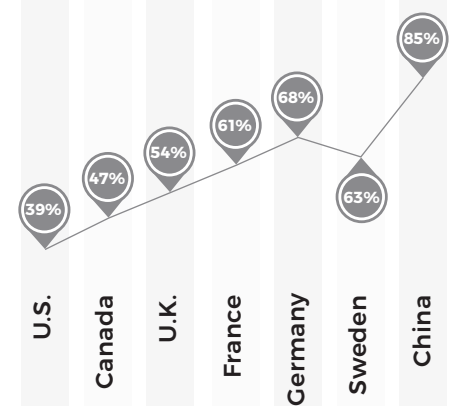
MEDIA RELATIONS

Globally, 68% make a concerted effort to stay in touch with the media even when there is no current story to be covered

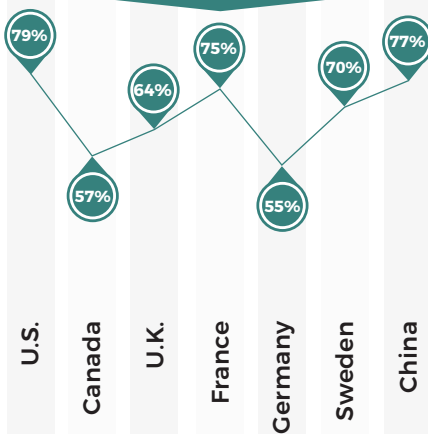


INFLUENCER RELATIONS

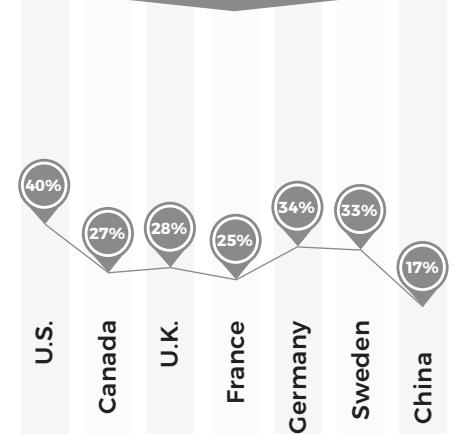
Globally, 54% say paying influencers is an important part of their influencer strategy



Globally, 71% consider traditional journalists among the most important audiences for their content



Globally, 32% say "very much" to describe specific effort devoted to target and build relationships with key influencers



Conclusions

Content creation remains vital to brands, but media monitoring, analytics, and reporting have risen in importance. Traditional journalists remain a key audience for PR pros. Meanwhile, influencers are certainly top of mind for brands, whether as paid partners or more time being devoted to building those relationships.

WHAT DATA IS DOING FOR YOU

The preceding pages have clearly established how data has become a huge part of our respondents' daily lives. Below we dig deeper into the availability of certain types of data and its effectiveness in improving key comms functions.

THE FULL BENEFIT

Do you have adequate resources to fully capitalize on all the benefits of technology and data? The following reflects those who answered "very much"

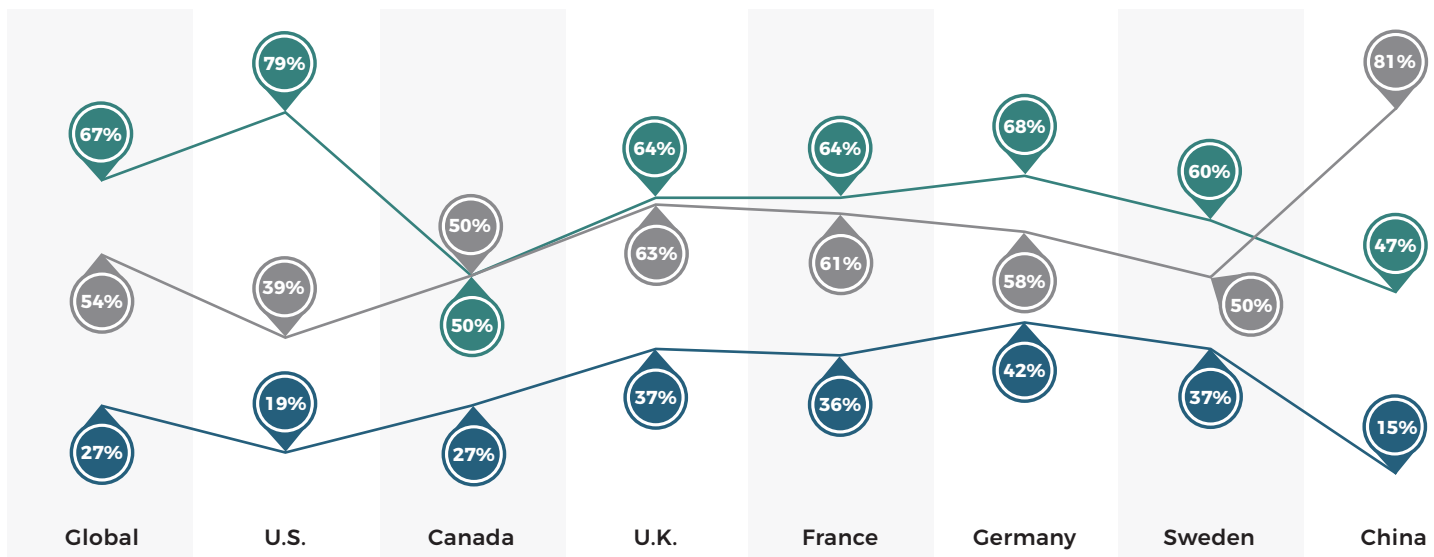
PROVING BOTTOM-LINE IMPACT

The following numbers reflect those who still struggle with a lack of data to properly prove the financial impact of their earned media efforts

IMPACT AND INFLUENCE

Can you always identify the right influencer to target with your initiatives and, in turn, impact customer behavior? These figures reflect those who said yes

By country, this is how the above sentiments were expressed:



Traffic assessment

In your end-audience analysis, are you able to ascertain how much traffic your content netted from each influencer with which you partnered? These figures reflect those who answered, "Yes, we are able to get that specific data."

Global	57%	France	71%
U.S.	46%	Germany	67%
Canada	59%	Sweden	52%
U.K.	57%	China	70%

Conclusions

While better in some countries than others, most respondents still have far to go to fully take advantage of all technology and data benefits. This challenge is particularly evident when it comes to proving comms' bottom-line impact. That said, the results do reflect an increasing ability to use data to link comms efforts to certain consumer activities.



Methodology

PRWeek partnered with Cision on this survey, which was sent via email to both comms and marketing pros in seven countries around the world: The U.S., Canada, U.K., France, Germany, Sweden, and China (including Hong Kong). A total of 410 senior-level professionals, from both agencies and in-house, took the online survey, conducted by Bovitz, between June 27 and August 9, 2018. 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 19 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.com and follow Cision on Twitter @Cision.



About PRWeek

PRWeek epitomizes the modern business publishing brand, spanning online, print, events, and social media, incorporating a paid-for content strategy and gated website. Launched in November 1998, it is the essential title for PR pros.

PRWeek reflects an industry playing a more pivotal role than ever, not only in the marketing strategies of companies, brands, and organizations, but also within boardrooms and in the C-suite. In the transparent world epitomized by social media, corporate reputation is crucial. Executives need timely, authoritative, insightful content to navigate this landscape – that's where PRWeek comes in.

Breaking news, analysis, and opinion fuels PRWeek's content. And the brand extends into the iconic PRWeek Awards, annual conferences, roundtables, webcasts, and virtual forums. For more, visit prweek.com.

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Cision's earned media management platform allows you to effectively target key influencers, craft strategic campaigns and monitor and analyze the results. With the Cision Communications Cloud® you can finally prove the impact of your media campaigns on your company's business outcomes.

Now that's modern communication.

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